
PeopleSoft Campus Solutions 9.2: Recruiting and Admissions

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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.

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.

<i>Typographical Convention</i>	<i>Description</i>
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 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.

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 psft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

Follow Us

<i>Field or Control</i>	<i>Description</i>
	YouTube
	Twitter@PeopleSoft_Info.
	PeopleSoft Blogs
	LinkedIn

Chapter 1

Getting Started with Recruiting and Admissions

Recruiting and Admissions Overview

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

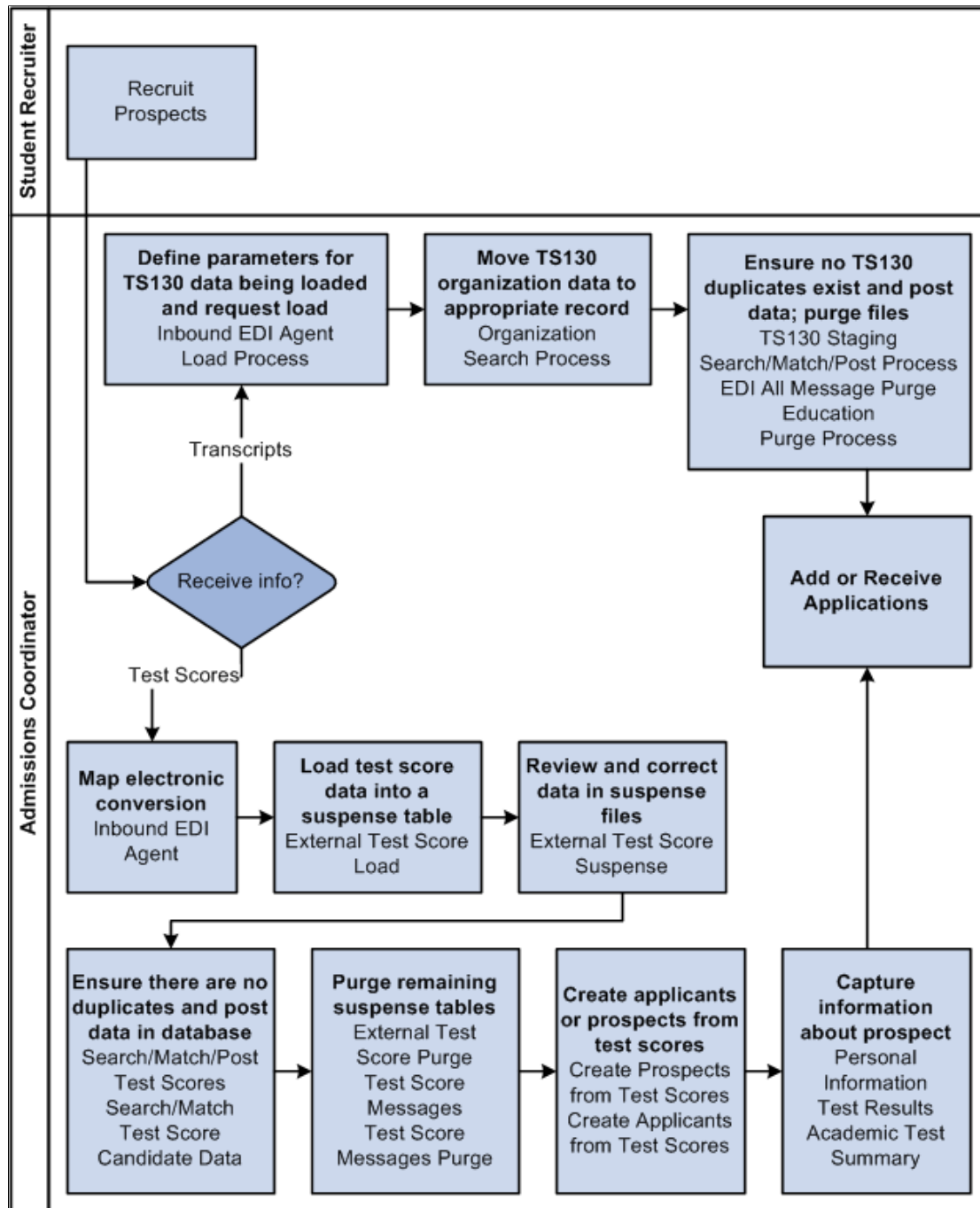
With this application, you can:

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

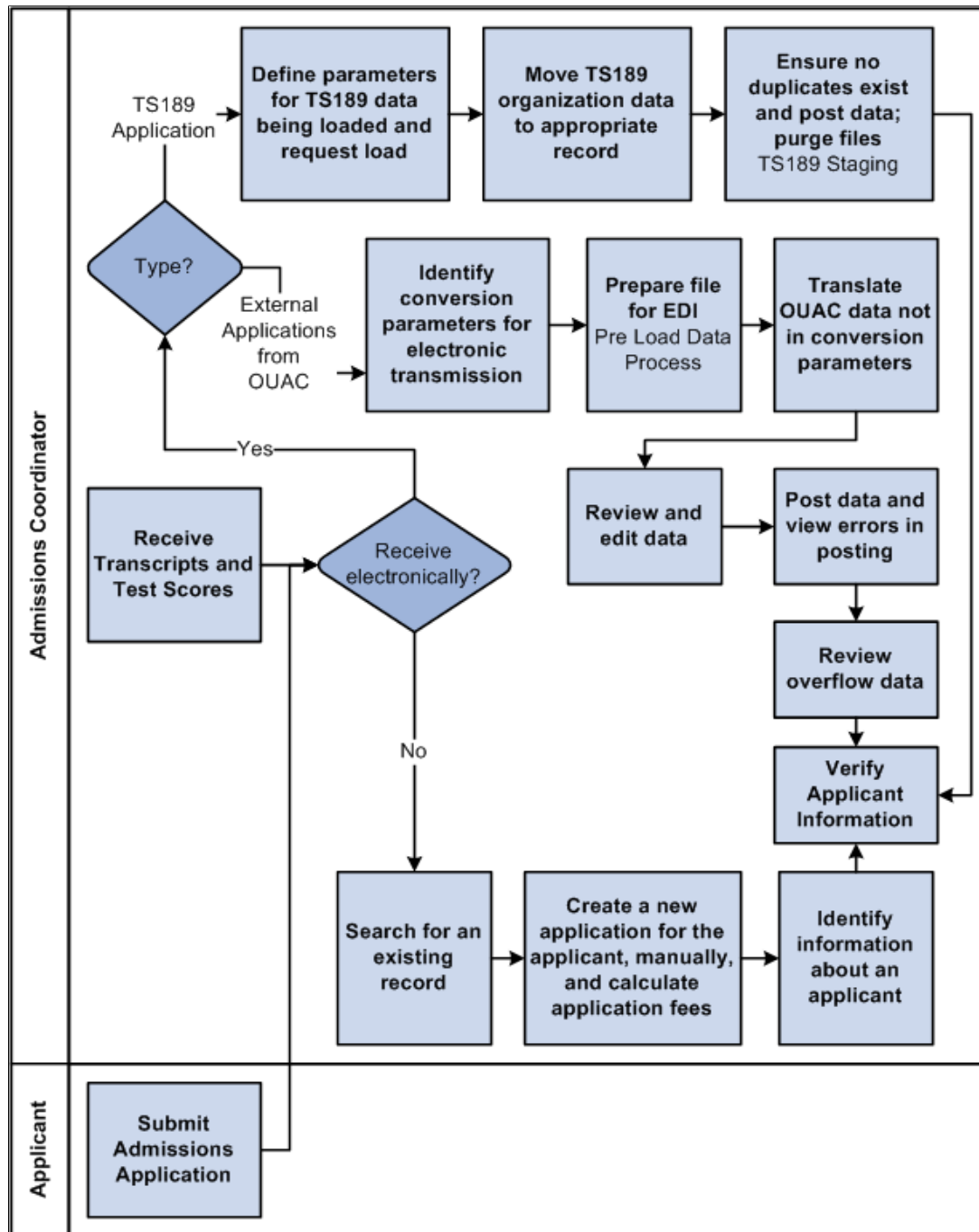
Recruiting and Admissions Business Processes

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

This diagram illustrates the receive transcripts and test scores business process.



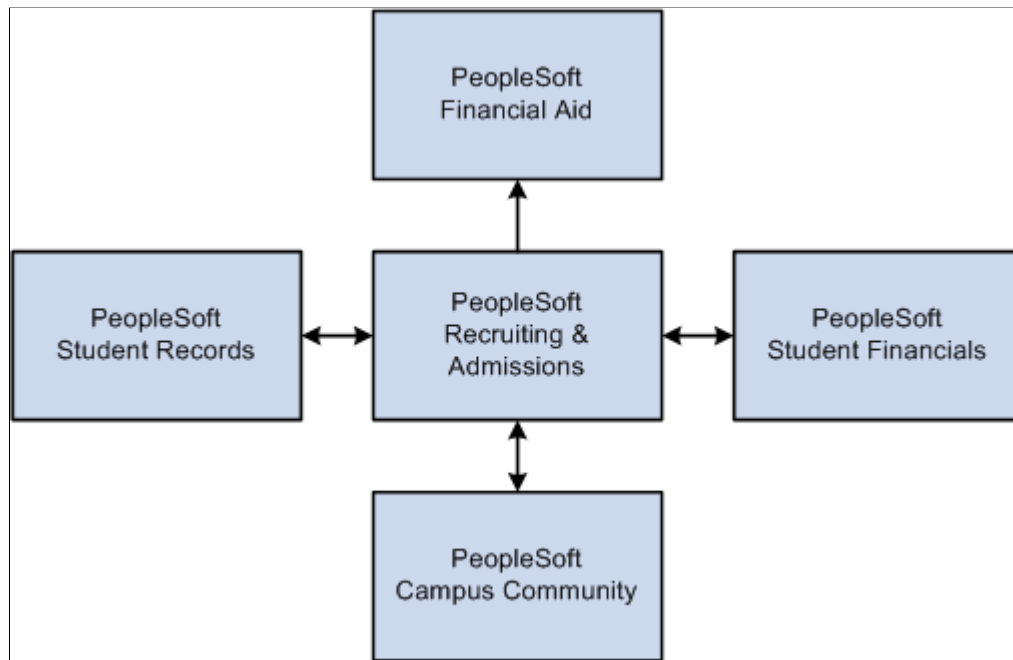
This diagram illustrates the add or receive applications business process.



Recruiting and Admission Integrations

Recruiting and Admissions integrates with these PeopleSoft applications:

This diagram illustrates that PeopleSoft Recruiting and Admissions integrates with PeopleSoft Campus Community, PeopleSoft Student Records, PeopleSoft Student Financials and PeopleSoft Financial Aid.



We discuss integration considerations in the implementation topics in this documentation.

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

PeopleSoft Campus Community

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

PeopleSoft Student Financials

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

PeopleSoft Student Records

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

Recruiting and Admissions Implementation

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

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

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

<i>Component</i>	<i>Component Interface</i>	<i>References</i>
CRS_MAJOR_CODE	SAD_CRS_MAJOR_CODE	See Defining and Reviewing External Data Setup Tables .

Other Sources of Information

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

See product documentation for *PeopleTools: Component Interfaces*

See product documentation for *PeopleTools: Setup Manager*

Additional Information for Getting Started with Recruiting and Admissions

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

See *Campus Solutions Application Fundamentals*

See *Campus Community Fundamentals*

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

Chapter 2

Building Your Recruiting Structure

Setting Up Your Recruiting Structure

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

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

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

- Set up region codes.
- Set up region trees.
- Activate region trees.
- Set up recruiting categories.
- Set up recruiting centers.
- Set up AAWS application fee waiver basis codes.
- Set up application processing centers.
- Map academic shifts to admit terms.

Pages Used to Set Up Your Recruiting Structure

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Region Table	REGION_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Prospect/ Applicant Recruiting > Region Table	Define the geographic regions that your academic institution uses for recruiting and admissions.

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

Setting Up Region Codes

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

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

Setting Up Region Trees

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

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

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

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

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

Entering Regions in the Region Table Page

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

Setting Up Postal Codes on the Region Postal Code Table Page

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

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

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

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

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

Defining a Region Tree for Recruiting and Admissions

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

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

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

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

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

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

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

Delivered Region Tree Examples

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

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

This is an example of part of the delivered GLAKE region tree.

The screenshot displays the 'Tree Manager' interface. At the top, it shows the following details: SetID: GLAKE, Last Audit: Valid Tree, Effective Date: 01/01/1900, Status: Active, and Tree Name: REGION Recruiting Regions. Below this, there are links for 'Save As', 'Close', 'Tree Definition', 'Display Options', and 'Print Format'. A navigation bar includes 'Collapse All', 'Expand All', 'Find', and pagination controls showing 'First Page', '8 of 8', and 'Last Page'. The tree structure is as follows:

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

See product documentation for *PeopleTools: Tree Manager*

Related Links

[Setting Up Region Codes](#)

[Understanding Adding Prospects](#)

Activating Region Trees

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

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

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

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

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

Setting Up Recruiting Categories

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

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

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

Field or Control	Description
Recruitment Group	<p>Assign the recruiting category to a recruitment group. Values are <i>Academic</i>, <i>Alumni</i>, <i>Athletics</i>, <i>Music</i>, <i>Region</i>, and <i>Special</i>. Recruitment groups are delivered with your system as translate values. You can modify these translate values.</p> <hr/> <p>Important! Do not change or delete the translate value <i>Region</i>. It is required for automated region and recruiter assignment.</p> <hr/>
Move to Application	Select to copy this recruiting information to the application record when the prospect who is assigned to this category becomes an applicant.
Academic Career Indicator	Select to limit the recruiting category to one career. For example, you can create a recruiting category called <i>EXTV</i> for those prospects who are currently business executives and define it so that it is only available to your <i>BUSN</i> (graduate business) academic career. Enter the career to which you want the category limited in the Academic Career field.

Field or Control	Description
Academic Career	If you want this category to be available for only <i>one</i> academic career, select the Academic Career Indicator check box and enter the career here. If you want this recruiting category to be available to <i>all</i> careers, clear the Academic Career Indicator check box and leave this field blank. This field determines the recruiting categories that appear in the Recruiting Category field on the Application Recruiters and Prospect Recruiters pages. Define academic careers on the Academic Career Table page.

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

Setting Up Recruiting Centers

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

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

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

Related Links

[Defining Recruiters](#)

"Understanding Recruiting and Admissions Security" (Campus Solutions Application Fundamentals)

Setting Up AAWS Application Fee Waiver Basis Codes

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

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

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

See [Reviewing and Editing Staged Admission Application Transactions](#)

Setting Up Application Processing Centers

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

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

Application Center Table

Academic Institution: PSUNV PeopleSoft University

Application Center: UGRD

Find | View All First 1 of 1 Last

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

*Description: Undergraduate

Short Description: Undergrad

Academic Career: Undergraduate

Application Fee Code: APP2 Undergraduate Application Fees

Deposit Fee Code:

Calculate Deposit Fee in Batch:

Student FTP Server ID:

CRM FTP Server ID:

AAWS Application Fee and Waiver Processing

Application Fee Required? Yes No

SF Merchant ID: AWTNCC AAWS HP Credit Card

SF eCheck Merchant ID:

When is Fee Payment Required?

At Application Submission

Pay Later

Allow Application Fee Waiver? Yes No

Valid Waiver Basis Codes: Customize | Find | View All | First 1 of 1 Last

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

Application Fee Waiver Process:

Require Manual Reconciliation

Allow to Post

App Fee Status Waived

App Fee Status Waiver Request

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

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

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

AAWS Application Fee and Waiver Processing

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

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

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

Field or Control	Description
Application Fee Waiver Process	<ul style="list-style-type: none"> If you select Require Manual Reconciliation, an administrator must approve or deny the waiver in the Application Transactions staging component before the application can be posted to core production. If you select Allow to Post, the application can be posted to core production and the administrator assesses the waiver request in the Application Maintenance component. <p>If your school allows waivers but automatically grants the waiver without review or assessment, you can select App Fee Status Waived as the Allow to Post option. When the application is posted, the Fee Status field value in Application Maintenance is set to <i>Waived</i>.</p> <p>If your school requires waiver requests to be assessed, select App Fee Status Waiver Request as the Allow to Post option. When the application is posted, the Fee Status field value in Application Maintenance is set to <i>Waiver</i>.</p>

Related Links

[Reviewing and Editing Staged Admission Application Transactions](#)

[Payment Integration Web Service Operations](#)

"Setting Up Application Fees" (Student Financials)

"Generating Direct to GL Entries" (Student Financials)

"Using the SSF_EPAYMENT_TRANS Web Service" (Student Financials)

[Defining Recruiters](#)

[Entering Application Program Data](#)

"Understanding Recruiting and Admissions Security" (Campus Solutions Application Fundamentals)

Mapping Academic Shifts to Admit Terms

Access the Academic Shift Mapping page (**Set Up SACR > Product Related > Recruiting and Admissions > Applicants > Academic Shift Mapping**).

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

Academic Shift Mapping

Academic Institution:	PSUNV	PeopleSoft University
Acad Career:	UGRD	Undergraduate
Academic Program:	LAU	Liberal Arts Undergraduate
Campus:	MAIN	Main Hacienda Campus
Term:	0730	2014 Fall

		Find	First	1	1-2 of 2	Last
*Academic Shift:	day shift		Total Seats:	40	+ -	
*Academic Shift:	Night		Total Seats:	20	+ -	

Use this page to map academic shifts to admit terms.

If the Use Shift by Admit Term check box is selected on the Academic Institution 3 page, only the values defined here for the particular admit term are available in the Academic Shift field on various pages in Admissions and Student Records.

The Total Seats field is informational only.

Related Links

"Setting Additional Institution Defaults and Options" (Campus Solutions Application Fundamentals)

"Defining Academic Shifts" (Campus Solutions Application Fundamentals)

Defining Recruiters

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

This section lists prerequisites and discusses how to:

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

Prerequisites

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

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

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

Related Links

"Using Search/Match" (Campus Community Fundamentals)

"Adding an Individual to Your Database" (Campus Community Fundamentals)

Pages Used to Identify Recruiters

Page Name	Definition Name	Navigation	Usage
Recruiters	RECRUITERS	Student Recruiting > Student Recruiters > Create/Update Recruiters > Recruiters	Designate a person as a recruiter or to update a recruiter's information.
Recruiter Categories	RECRUITER_RCR_CAT	Student Recruiting > Student Recruiters > Create/Update Recruiters > Recruiter Categories	Assign recruiting categories to recruiters. This aids in recruiter assignment. You also assign recruiting categories to prospects and applicants, enabling you to match appropriate recruiters to prospective students.
Recruiter Regions	RECRUITER_REGIONS	Student Recruiting > Student Recruiters > Create/Update Recruiters > Recruiter Regions	Link recruiters at the career level to specific geographic regional assignments. You can also use this page to exclude recruiters from certain regions or external organizations. For example, you can assign a recruiter to the Texas region, but <i>exclude</i> him or her from Abilene and Waco. You also link prospects and applicants to geographic regions, enabling you to match appropriate recruiters to prospective students.
Recruiter Centers	RECRUITER_CENTERS	Student Recruiting > Student Recruiters > Create/Update Recruiters > Recruiter Centers	Link a recruiter to the appropriate recruiting and application centers, which is beneficial for grouping and reporting purposes. You can link prospects to recruiting centers and applicants to application centers.

Page Name	Definition Name	Navigation	Usage
Recruiter Programs	RECRUITER_PROGRAMS	Student Recruiting > Student Recruiters > Create/Update Recruiters > Recruiter Programs	Link recruiters to academic programs and academic plans.

Designating Recruiters

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

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

Field or Control	Description
Recruiter Type	Select a recruiter type for this person. Values are <i>Alumni</i> , <i>Faculty</i> , <i>Staff</i> , and <i>Student</i> . Recruiter types are delivered with your system as translate values. You can modify these translate values.
Recruiter Role	<p>Select one or more recruiter roles for this person. In our example, John Chavez is both an evaluator and an interviewer. Add as many recruiter roles as are relevant to this person. A recruiter can recruit for more than one career. Add the recruiter again, only select the relevant academic career when prompted.</p> <p>Recruiter roles are delivered with your system as translate values. You can modify these translate values.</p>

Assigning Recruiters to Recruiting Categories

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

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

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

Field or Control	Description
Category	Enter the appropriate recruiting categories for this recruiter. Define categories on the Recruiting Category Table page. In the preceding page example, this recruiter is assigned to the <i>High Test Scores</i> and <i>Region</i> recruiting categories.
Group	The group to which this category belongs.
Assignment Stage	For each category, select the appropriate stage of recruiting in which this recruiter is involved. Values are <i>Applicant</i> , <i>Prospect/Applicant</i> , and <i>Prospect</i> . For track and field, basketball, and region, our example recruiter looks at prospects and applicants. Values for this field are delivered with your system as translate values. You can modify these translate values.

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

Linking Recruiters to Geographic Regions

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

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

Recruiters | Recruiter Categories | **Recruiter Regions** | Recruiter Centers | Recruiter Programs

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate
Recruiter ID: ADREC1 Chavez, John Joseph

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active
Recruiter Type: Staff

Find | View All First 1 of 1 Last

*Stage: Prospect/Applicant
 *Region: CCOAST CA Central Coast
 *Include/Exclude: Exclude

Find | View All First 1 of 1 Last

External Org ID 000010041 Seaside High School Include/Exclude Include

Field or Control	Description
Stage	Select the stage of recruitment in which this recruiter is involved for this region. Values are <i>Applicant</i> , <i>Prosp/Apppl</i> (prospect/applicant), and <i>Prospect</i> . Stage values are delivered with your system as translate values. Any modifications to these values require a substantial programming effort.
Region	Select a region for this recruiter. This can be a region where this person recruits, or a region where this person does <i>not</i> recruit. Define regions on the Region Table page.
Include/Exclude	<p>Choose whether to <i>Include</i> the recruiter in or <i>Exclude</i> the recruiter from this region. If you select <i>Include</i>, the recruiter can be assigned to prospects or applicants in any school in that region. If you select <i>Exclude</i>, the recruiter can not be assigned to prospects or applicants in any school in that region.</p> <p>Note: First add the regions where this person recruits. Then, if you must exclude the person from certain areas, add those rows last.</p>

Field or Control	Description
External Org ID (external organization ID)	<p>If you want a recruiter to recruit at a school in a region from which he or she is excluded (for example, include a school in an excluded region), or if you do not want a recruiter to recruit at a school in a region in which he or she is included (for example, exclude a school from an included region), enter the external organization ID of the school you are including or excluding. All schools within the postal code range of the selected region are available.</p> <hr/> <p>Note: Be aware that you can only exclude or include a school (in the External Org ID field) from a region if the Region value entered is at the <i>lowest level region node</i> on your region tree. If the region value is at any other level, you cannot access the External Org ID field.</p> <hr/>
Include/Exclude	The display-only Include/Exclude field (next to the External Org ID field) automatically contains the opposite value of that entered in the Include/Exclude field (below the Region field).

An Example of Including and Excluding Regions and Schools

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

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

Associating Recruiters with Recruiting and Application Centers

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

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

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

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

Related Links

"Understanding Recruiting and Admissions Security" (Campus Solutions Application Fundamentals)

Linking Recruiters with Academic Programs and Academic Plans

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

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

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

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

Chapter 3

Setting Up Prospects

Setting Up Admission Installation Defaults

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

This section discusses how to set up admission installation defaults.

Page Used to Set Up Admission Installation Defaults

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

Setting Up Admission Installation Defaults

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

This example illustrates the fields and controls on the Installation Defaults - AD page. You can find definitions for the fields and controls later on this page.

Installation Defaults - AD

From Prospect to Application

☒ Copy Data

Matching Criteria

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

Data to Copy

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

From Application to Prospect

☐ Update Data

Create Prospect if no Match

☐ Create Prospect

Recruiting Status

Referral Source

Appl on File Warning Criteria

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

Student Response

☒ Free Form Institution

Academic Interest

☒ Use Priority

Last School Attended

☒ Warn for Last School Attended

Intl Student Health Coverage

☐ Display on Appl Data Page

External Course Entry

☒ Duplicate Course Warning

New Features

☒ Fluid Self Service

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

From Prospect to Application

Field or Control	Description
Copy Data	Select this check box if you want prospect information copied to the application record. Clear this check box if you don't want prospect information copied to a new application.

Matching Criteria

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

See "Entering User Defaults" (Campus Solutions Application Fundamentals)

Data to Copy

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

- Recruiting categories.
- Last school attended and graduation date.

- Financial aid, housing, admit type, and academic level and load.

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

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

See [Adding Prospects Through the Create/Update Prospects Component](#).

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

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

From Application to Prospect

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

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

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

Create Prospect if no Match

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

Field or Control	Description
Create Prospect	Select this check box to create a retroactive prospect record for an applicant. You must have selected the Update Data check box. When you save the new application, the system automatically creates a prospect record. The new record contains the following data from the application: admit term, admit type, campus, academic level, academic load, academic program, academic plan and sub-plan, recruiting status, application number, status date, last school attended, graduation date and region. Recruiting center comes from your user defaults. Additionally, the application number appears on the Prospect Program Data page in the Create/Update Prospects component, and the Applied field is selected on the Prospect Career Data page in the Create/Update Prospects component. The system only creates a prospect if a recruiting center is defined in your user defaults.
Recruiting Status and Referral Source	If you selected the Create Prospect check box, enter a recruiting status and a referral source on the new prospect record. Recruiting status values are delivered with your system as translate values. You can modify these translate values. Define referral sources on the Referral Source Table page.

Appl on File Warning Criteria

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

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

Field or Control	Description
Institution, Career, Program, Admit Term	<p>If an application for this person exists with the same institution, career, program, and admit term as the application that you are saving, a warning message appears.</p> <p>If the system detects a potential duplicate when you save an application, you get a warning such as the following:</p> <p>"An application with Career (UGRD), Program (LAU), Admit Term (0450) and Institution (PSUNV) already exists.</p> <p>If you would like to create a new application with the same Career, Program, Admit Term and Institution click the OK button, otherwise click the Cancel button."</p>

Student Response

Field or Control	Description
Free Form Institution	<p>Select this check box to allow your users to enter a free-form institution name on the Student Response page and to allow students to enter a free form name on the self-service Accept Admissions page. If you want users to select from a list of external organizations that your institution has, clear this check box.</p> <p>You can use the Student Response page to capture reasons why a prospect or applicant chose or rejected your institution. This is important information that your institution might want to track and report on. Your institution has the option of allowing end users to enter the free-form name of a school when they capture data on the Student Response page. You might want to enable this option (on the Installation Defaults - AD page) because a student can choose to attend an institution that is not loaded as an external organization in your system.</p> <p>See Updating Applications.</p>

Academic Interest

<i>Field or Control</i>	<i>Description</i>
Use Priority	<p>Select this check box to enable the Academic Interest Priority feature. To disable the Academic Interest Priority feature for your institution, clear this check box.</p> <p>The Academic Interest Priority feature enables you to capture and view a prospect's or applicant's academic interest priority ranking level. For example, pre-law could be their first level academic interest priority and technology could be their second level academic interest priority. This feature can help in your enrollment management, recruiting efforts, and reporting program evaluation. If you enable this feature, the Priority field becomes active on the Academic Interests page.</p> <p>See Prerequisites for Tracking Supporting Prospect and Applicant Information</p>

Last School Attended

<i>Field or Control</i>	<i>Description</i>
Warn for Last School Attended	<p>Select this check box to have the following warning message appear: "The Last School Attended will not be automatically added to the academic history record."</p> <p>This message appears if you enter a value in the Last School Attended field on the Prospect School/Recruiting page or the Application School/Recruiting page at the time of updating a prospect or applicant record. You should use the External Education page to update an applicant's or prospect's academic history.</p> <p>The warning message does not appear if you enter a value in the Last School Attended field on the Prospect School/Recruiting page or the Application School/Recruiting page at the time of prospect or applicant creation.</p>

External Course Entry

<i>Field or Control</i>	<i>Description</i>
Duplicate Course Warning	<p>Select this check box to warn the user that a duplicate external course has been entered in the Education component. The following message appears: "Warning - Duplicate row for Subject (Subject) and Course Nbr (Course Number) in Organization (Ext Org ID) (14200, 456)".</p> <p>A duplicate course is defined as the same school subject and course number for an external organization.</p>

New Features

<i>Field or Control</i>	<i>Description</i>
Fluid Self Service	<p>Select to indicate that Fluid features for Admissions self service have been adopted. By default, this check box is deselected.</p> <p>This check box is for informational purposes only.</p>

See:

- "Managing Applications Using PeopleSoft Fluid User Interface" (Campus Self Service)
- "Understanding PeopleSoft Fluid User Interface Homepages" (Campus Solutions Application Fundamentals)

Setting Up Admit Types

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

This section discusses how to set up admit types.

Page Used to Set Up Admit Types

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

Setting Up Admit Types

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

<i>Field or Control</i>	<i>Description</i>
Academic Career	Select the academic career to which this admit type is related if you want this type available for <i>only</i> that career. Do <i>not</i> select an academic career if you want this admit type available for <i>all</i> careers.
Readmit Processing Required	Select this check box if the admit type requires you to admit a person into an existing student record (for example, a person applies to reenter a program they were previously studying at your institution). When this admit type is entered on an application record, the system populates an existing program record rather than create a new record when the person matriculates.

Setting Up Referral Sources

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

This section discusses how to set up referral sources.

Page Used to Set Up Referral Sources

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

Setting Up Referral Sources

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

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

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

Related Links

[Setting Up Admission Installation Defaults](#)

Setting Up School Types

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

This section discusses how to set up school types.

Page Used to Set Up School Types

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

Setting Up School Types

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

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

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

<i>Field or Control</i>	<i>Description</i>
(AUS) DEEWR Credit Basis	<p>Enter the value to be reported for DIISRTE Element 561 Credit-Basis, if the school type is assigned to manual course credits processed for the student. (DIISRTE - Department of Industry, Innovation, Science, Research and Tertiary Education - was previously DEEWR, and before that, was DEST.)</p> <p>This field appears only if the DEST, HECS, Centrelink, TAC (Department of Education, Science and Training, Higher Education Contribution Scheme, Centrelink, Tertiary Admissions Centre) check box is selected on the SA Features page.</p>
(AUS) DEEWR Provider Type VET	<p>Enter the value to be reported for DIISRTE Element 564 Provider Type, if the school type is assigned to manual course credits processed for the student.</p> <p>This field is optional. If the school type is not used for VET related study, you do not have to enter a value.</p> <p>This field appears only if the DEST, HECS, Centrelink, TAC check box is selected on the SA Features page.</p>

Related Links

[Setting Up Admission Installation Defaults](#)

"Defining Organization Groups and Contacts" (Campus Community Fundamentals)

"Creating or Loading External Organization Codes" (Campus Community Fundamentals)

"Setting Up Organization Types" (Campus Community Fundamentals)

Setting Up Extracurricular Activities

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

This section discusses how to set up extracurricular activities.

Page Used to Set Up Extracurricular Activities

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

Setting Up Extracurricular Activities

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

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





Extracurricular Activity Table

SetID: PSUNV

Extracurricular Activity: A01


Description

Find | View All First 1 of 1 Last

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


***Description:** Archery

Short Description: Archery

***Activity Type:** Athletics 

Activity Offering

☒ Internal and External
 ☐ Internal
 ☐ External

Extra Activity Primacy: 

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

Activity Offering

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

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

Additional Elements

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

Setting Up Honors and Awards

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

This section discusses how to set up honors and awards.

Page Used to Set Up Honors and Awards

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

Setting Up Honors and Awards

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

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

<i>Field or Control</i>	<i>Description</i>
Internal/External	Select a value to indicate whether this award or honor is internal or external to your institution.

Field or Control	Description
Grantor	Enter a grantor if one is associated with this award.
Transcript Level	<p>Select the transcript level for which you want the honor or award to appear. Values are: <i>Degr Prog</i> (degree program), <i>Not Print</i>, <i>Official</i>, <i>Stdnt Life</i> (student life), and <i>Unofficial</i>. This field is only available if the Internal/External field is set to <i>Internal</i>.</p> <p>The transcript level is hierarchical, based on the two position numeric codes in the value column of the translate table. Depending on the transcript level that you select, the system prints the honor or award on that transcript type and all other transcript types occurring below it on the translate table.</p> <p>For example, if you select <i>Official</i> for your transcript level (which has a level value of 20 on the translate table), the system prints the honor or award on all transcript types.</p> <p>If you select <i>Stdnt Life</i> for your transcript level (which has a level value of 60 on the translate table), the system prints the honor or award only on student life transcripts (level 60) and PeopleSoft Academic Advisement degree progress transcripts (level 80). The following table shows the hierarchy of these transcript level values.</p>

Value	<i>Translate Table Values Long Name for TRANSCRIPT_LEVEL Field</i>
00	Never Print
20	Print on Official
40	Print on Unofficial
60	Print on Student Life
80	Print on Degree Programs

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

Setting Up Student Groups

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

This section discusses how to set up student groups.

Page Used to Set Up Student Groups

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

Setting Up External Summary Types

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

This section discusses how to set up external summary types.

Page Used to Set Up External Summary Types

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

Setting Up External GPA Tables

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

This section discusses how to:

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

Pages Used to Set Up External GPA Tables

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

Defining External GPA Type Codes

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





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

External GPA Type Table

Academic Institution: PSUNV PeopleSoft University

GPA Type: 100A

Find | View All
First 1 of 1 Last



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

***Description:** 100 Point Scale A

***Short Description:** 100 Pt A

GPA Values

Find | View All
First 1 of 1 Last

*External GPA	*Description	Short Desc
<input type="text"/>	<input type="text"/>	<input type="text"/>  

Defining the External GPAs

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

Field or Control	Description
External GPA	Enter the external GPA value for each GPA value.
Short Description	Enter a short description—up to 15 characters—for each GPA value.

Setting Up GPA Conversion Rules for GPA Types

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

This example illustrates the fields and controls on the External GPA Rules Table page. You can find definitions for the fields and controls later on this page.

External GPA Rules Table

Academic Institution: PSUNV PeopleSoft University

GPA Type: 100A 100 Point Scale A

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

GPA Conversion Rules Find | View All First 1-5 of 12 Last

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

Field or Control	Description
Effective Date	Enter an effective date for this GPA rule. If the effective date is equal to or greater than the effective date for this GPA type, then this GPA rule is active.
Converted GPA	Enter the converted GPA that applies to the range entered in the From GPA and To GPA fields.

<i>Field or Control</i>	<i>Description</i>
From GPA and To GPA	You can enter any numeric value in these fields. If you defined GPA values (on the GPA Type Table page) for this GPA type, you can prompt for those values, but you can also enter values that are not defined. You can add as many converted GPAs as required for a GPA type.

Reviewing Material Types and Defining Material Groups

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

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

This section discusses how to:

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




Pages Used to Review Material Types and Define Material Group

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

Viewing Material Types

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

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

Material Type Table			
Customize Find View All  First  1-9 of 10  Last			
Material Type	Description	General Material	
AUD	Audition	<input checked="" type="checkbox"/>	Material Data
CRS	External Courses	<input type="checkbox"/>	Material Data
ESS	Essay	<input checked="" type="checkbox"/>	Material Data
INT	Interview	<input checked="" type="checkbox"/>	Material Data
POR	Portfolio	<input checked="" type="checkbox"/>	Material Data
REC	Recommendation	<input checked="" type="checkbox"/>	Material Data
SBJ	External Subjects	<input type="checkbox"/>	Material Data
SUM	Academic Summary	<input type="checkbox"/>	Material Data
TRN	Transcripts	<input type="checkbox"/>	Material Data

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

Field or Control	Description
General Material	<p>Material types that are designated as general materials—the check box is selected—appear as a material type on the General Materials page. When you enter general materials for a prospect or applicant, you can choose only those designated material types.</p> <p>Material types that are not indicated as general materials—the check box is cleared—appear on the Application Materials page.</p>
Material Data	<p>Click this link to display the Material Type Field Usage page. This page is for informational purposes only. All items marked with a <i>Y</i> or a <i>I</i> on the Material Type Field Usage page are available to add to an application record on the General Materials page. For example, the Recommendation material type contains a <i>Y</i> for city, but nothing for essay topic. Thus, on the General Materials page you can enter a city for the prospect but not an essay topic.</p>

Using the Material Type Field Usage Page

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

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

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

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

Material Type Values	General Material?
AUD - Audition	Y
CRS - External Courses	N
ESS - Essay	Y
INT - Interview	Y
POR - Portfolio	Y
REC - Recommendation	Y
SBJ - External Subjects	N

Material Type Values	General Material?
SUM - Academic Summary	N
TRN - Transcripts	N
TST - Test Scores	N

Setting Up Material Groups

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

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

Material Group Table

Academic Institution: PSUNV PeopleSoft University

Material Group: GRAUDTNS

Find | View All First 1 of 1 Last

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

*Description: Graduate Auditions

Short Description: Grd Audtns

Material Type Find | View All First 1 of 1 Last

AUD Audition

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

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

Chapter 4

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

Understanding Self-Service Request Information

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

See "Campus Self Service Overview" (Campus Self Service)

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

Prerequisites

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

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

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

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

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

Related Links

"Defining Communication Speed Keys" (Campus Community Fundamentals)

"Defining 3C Engine Events" (Campus Community Fundamentals)

Requesting Self-Service Information

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

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

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

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

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

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

See "Campus Self Service Overview" (Campus Self Service)

Setting Up Self-Service Request Information

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

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

This section discusses how to:

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

Pages Used to Set Up Self-Service Request Information

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

Enabling Segments and Prospect Career Fields

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

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.

The screenshot shows a web interface with two tabs at the top: 'Web Prospect Setup' (active) and 'Web Prospect Setup 2'. Below the tabs are two sections, each with a blue header bar.

Enable Segments

- ☒ **Academic Interests**
- ☒ **Test Results**
- ☐ **Academic Program**
 - ☐ **Academic Plan**
 - ☐ **Academic Sub-Plan**

Enable Prospect Career Fields

- ☐ **Campus**
- ☒ **Admit Term**
- ☐ **Admit Type**
- ☐ **Academic Level**
- ☐ **Academic Load**
- ☐ **Housing Interest**
- ☐ **Financial Aid Interest**
- ☐ **Last School Attended**
- ☐ **Graduation Date**

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

Enable Segments

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

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

Enable Prospect Career Fields

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

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

Setting Up Institution and Career Parameters

Access the Web Prospect Setup 2 page (**Set Up SACR > Product Related > Recruiting and Admissions > Prospects > Web Prospect Create Table > Web Prospect Setup 2**).

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.

The screenshot shows the 'Web Prospect Setup 2' page with three main sections:

- Acad Int/Test Results Defaults:**
 - *Data Source: Web (dropdown menu)
- Institution Setup Parameters:**
 - *Academic Institution: GLAKE (text field with search icon) → Great Lakes University
 - *Recruiting Status: Applicant (dropdown menu)
 - *Referral Source: EVNT (text field with search icon) → Campus Event
- Career Setup Parameters:**
 - *Academic Career: UGRD (text field with search icon) → Undergraduate
 - *Recruiting Center: UCTR (text field with search icon) → University Recruiting Center
 - ☒ Allow Prospect To Select Comm Event ID: (text field with search icon)
 - ☒ Send Default Communication Event ID: (text field with search icon)

Acad Int/Test Results Defaults

Field or Control	Description
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

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

Career Setup Parameters

<i>Field or Control</i>	<i>Description</i>
Academic Career	Enter the academic careers that you want to be available for the visitor to select. On the Request Information detail page, visitors can select the academic careers that interest them. The system uses the selected academic career to create the prospect record. You must enter at least one academic career.
Recruiting Center	Enter the recruiting center that you want the system to assign to the new prospect record. You can enter a different recruiting center for each academic career. The system assigns the selected recruiting center to new prospect records, based on information collected through the Request Information self-service transaction.

Field or Control	Description
Allow Prospect to Select Comm (allow prospect to select communication)	<p>Select this check box to enable visitors to select from a list of available communications. If you select this check box, a group box that lists the communication items contained in the event ID that you select appears on the Request Information detail page. Visitors can select which items to receive. For example, the <i>UGRD Web Prospect</i> event ID at PSUNV includes communications containing information on financial aid, campus housing, and undergraduate applications. Visitors can choose one or more communications from this list.</p> <p>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.</p>
Send Default Communication	Select this check box to send a default communication to all visitors who request admissions information for this particular academic institution and career.
Event ID	<p>Enter the event IDs that contain the communications that you want mailed to visitors (for each academic career). Enter an event ID in at least one of the Event ID fields. If both fields are blank, then a visitor could submit a Request Information request and receive a confirmation that the request went through, without receiving any communication. The event ID tells the system which communications to send to the visitor. Define event IDs on the Event page.</p> <p>See "Creating an Event" (Campus Community Fundamentals).</p>

Using Self-Service Student Recruiting for Recruiting and Admissions

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

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

Prerequisites

Before recruiting officers can view prospects and applicants through self-service pages, they must have prospects and applicants that are assigned to them. Assign a recruiter to a prospect on the Prospect

School/Recruiting page or through the Process Recruiters pages. Assign a recruiter to an applicant on the Application School/Recruiting page.

Pages Used to Manage Student Recruiting for Recruiting and Admissions

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 one of the prospect search results pages.	Recruiting officers use this page to view program details for a prospect.
Prospects by Organization - Select Search Criteria	SS_ADM_PRS_REQ_ORG	Self Service > Student Recruiting > View Prospects by Organization	Recruiting officers use this page to search for prospects by organization.
Prospects by Organization - Search Results	SS_ADM_PRS_SUM_ORG	Click the Search button on the Prospects by Organization - Select Search Criteria page.	Recruiting officers use the page to view prospect search results.
Organization Primary Location	EXT_ORG_LOC	Click the Org Primary Location link on the Prospects by Organization - Search Results page.	Recruiting officers use this page to view the organization's primary address.
Prospects by Region - Select Search Criteria	SS_ADM_PRS_REQ_REG	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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.

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

Setting Up and Working with Approvals

Understanding Approvals

Many daily tasks are part of a larger process that involves several steps and people working together, such as the approval of a promotion. To facilitate this type of multiuser process, PeopleSoft provides approvals functionality, which enables you to automatically trigger workflow notifications to inform the next approver in the process of pending transactions.

While many PeopleSoft applications are delivered with predefined approval processes, PeopleSoft Recruiting and Admissions delivers proofs-of-concept transactions. Because each admissions office business practice may differ in terms of how an admissions approval request is handled (for example), the proofs of concepts are examples of basic transactions that utilize one level and path. You can use the delivered transactions if they meet your business needs, or modify them to meet your business requirements. You can also create new transactions and reuse the approval objects to support an admissions transaction.

Before implementing, you should read all relevant sources of information to gain a complete understanding of how the pieces fit together.

- The topics in this section provide PeopleSoft Recruiting and Admissions product specifics of the Approval Framework functionality as well as Fluid Approvals. The documentation lists the navigation and additional topics specific to setting up approvals for admissions.
- Application-specific Campus Solutions documentation such as PeopleSoft Self Service and PeopleSoft Recruiting and Admissions explain related setup topics for self service admissions using PeopleSoft Fluid User Interface.
- *PeopleSoft Approval Framework* describes the common Approval Framework functionality that applies to all product families.

Approval Framework

The Approval Framework is the engine that provides the framework and capabilities for creating, running, and managing approval processes. The engine uses a series of database objects combined with application component configuration settings to determine how to process approvals using workflow.

Approval workflows are triggered when requesters submit a transaction, such as a promotion. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow. A set of approvers then carry out tasks related to the transaction.

The Approval Framework enables three levels of users to develop, configure, and use transaction approvals that meet their organizational requirements. For example, the process of submitting a deferral request, and getting it approved requires defining who will approve the promotion, the order in which they will approve it, and how it will be routed to approvers.

In contrast to the standard PeopleSoft workflow, which requires advanced technical skills in PeopleSoft PeopleTools to create and maintain, approval workflow provides an alternative workflow that is much easier to create, configure, and maintain. For example, all of the steps in approval workflow are defined using PeopleSoft pages rather than underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages instead of requiring technical developers to create workflow rules.

For more information about the Approval Framework features and process flow, see “Understanding the Approval Framework” in *PeopleSoft Approval Framework*.

Approvals Terminology

The following terms are important in understanding the approvals functionality and are used throughout this section.

Field or Control	Definition
Approval Process	A generic term referencing the business process of how a particular transaction is routed for approval within an organization.
Approval Framework	Engine that provides capabilities for the creation, execution, and management of approval processes.
Approval Process Definition	The definition of an approval process within the Approval Framework. The definition may contain stages, paths, steps, varying hierarchies, and criteria, among other configurable parameters.
Approval Process Definition ID (Process ID)	The ID associated with a particular approval process definition in the Approval Framework. Each transaction registered with the Approval Framework must have at least one process ID defined.
Request	A transaction that uses the Approval Framework for approval processing. For example, a promotion, transfer time off request, job requisition, and so on.
Approval Step or Step	A step has one or more approvers, whose actions are tracked. A step can be configured to require a set number of approvers to act, and has criteria which govern whether or not the step is to be active for the request under consideration. Steps are sequential.
Approval Path or Path	A path is a sequence of steps. For example, step two routes to its approvers only after step one is approved. A given approval could actually go through multiple approval paths based on some decisions. Paths can be mutually exclusive or parallel. They all converge at the final approval.

Field or Control	Definition
Approval Stage or Stage	A stage is a collection of approval paths. Approval stages come in a single sequence (stage 1, stage 2, and so on). An approval stage runs when it's immediately preceding stage finishes. When an approval stage runs, all the approval paths within it run simultaneously. The approval stage is considered complete when all approval paths within it have finished.
Approver	The person who has been determined to have the authority to approve (deny, pushback, and so on) a request.
Requester and Originator	The requester is the person for whom you want the Approval Framework to treat as the initiator of a request. In most cases the requester and originator are the same person. However, when using the Delegation feature the requester and originator of a request can vary. For example, if a manger delegates a transaction to a direct report and that direct report submits the transaction, the direct report is the originator and the manager is the requester.
Subject	The person for whom a transaction is being processed.
Supervisor or Manager	The person who has management responsibilities for the requester or for an approver, as defined in your direct report settings during implementation.
Approvals Administrator or Approval Framework Administrator	The system administrator who is responsible for configuring, managing, troubleshooting, and maintaining approvals.
Event or Approval Event	The Approval Framework engine is event driven. Events are typically actions that can be taken by a user in the system, actions such as submit, approve, deny, push back, and so on.
Status or Approval Status	Statuses typically represent the overall state a transaction is in, such as pending, on hold, approved, denied, terminated, and so on.
Approval Criteria	Rules used to decide whether or not approval is required. Approval criteria fields and dimensions are data elements and attributes that are used to define the approval criteria.
Approval Hierarchy	The organizational hierarchy that models the actual approvals required by a transaction type (for example, approval hierarchy by supervisor or department).
User List	Collection of users (PeopleSoft Operator IDs) expressed as the result of an SQL statement, PeopleSoft role, or PeopleSoft Application Class.

Field or Control	Definition
Alternate Approver or Alternate User ID	A user can have another user in the system as his or her alternate approver for a specified period of time. This is set on the Workflow page of the User Profile component within PeopleTools security.
Delegation	Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Implementing Campus Solutions Transactions for Approval Framework

Campus Solutions delivers approval transactions for common admissions requests that have basic configuration to work with Approval Framework. You should review the delivered transaction data within the application pages to ensure that the data fits your business processes.

To deploy an approval transaction and review delivered transactions for use with Approval Framework, do the following:

Register the approval transaction in the Approval Framework

Use the Register Transactions page (**Enterprise Components > Approvals > Approvals > Transaction Registry**) to link the components, event handler, records, and classes that you created into the approval process for an application transaction, such as a deferral request. Application developers register the main records and components that make up the transaction, then functional business analysts select the approval transaction on which to base the approval process definition.

Campus Solutions delivers the following Registered Transactions Process IDs:
SAD_DEFR_APPROVAL, SAD_CHPP_APPROVAL, SAD_WITH_APPROVAL.

These IDs correspond to the types of requests an applicant can make through Fluid Self Service (Applicant Homepage). You can use these process IDs as is if they meet the business needs, or use them as examples to create a new process ID. You can also reuse the objects in the delivered transactions (components, event handler, records, classes) in another applicant Self Service-related process ID.

For more information on the Register Transactions page, see *PeopleSoft Approval Framework*, Defining the Approval Transaction Registry, Setting Up the Transaction Registry.

Set up the configuration options for the approval transaction

Use the Configure Transactions page (**Enterprise Components > Approvals > Approvals > Transaction Configuration**) to 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 and include menus and components and SQL definitions.

Campus Solutions provides an accompanying Transaction Configuration for each Process ID that is delivered in the Transaction Registry. If you create new Process IDs to use in Applicant Self Service Approvals, you must create a corresponding Transaction Configuration for each Process ID. You can reuse the delivered objects in new Transaction Configurations.

Note: Campus Solutions delivers notifications at the Approval Process Definitions level to allow for more granular control of the notification messaging. You can set up notifications at this level.

For more information on the Configure Transactions page, see *PeopleSoft Approval Framework*, Defining the Approval Transaction Registry, Configuring Approval Transactions.

Set up the approval process definition

Use the Setup Process Definition page (**Enterprise Components >Approvals >Approvals >Approval Process Setup**) to define an approval definition process. The process is made up of stages and their paths and steps. The approval steps that you place on the approval path represent the approval levels that are required for a transaction. Multiple definition IDs may be created under one Process ID.

Campus Solutions delivers a Process Definition ID as a proof of concept for each Process ID that is delivered. It is expected that customers will want to create their own definition IDs because it is at this level where approvers, notifications, process flow, and security access are defined.

You would associate the Definition ID under one of the delivered Process IDs (SAD_DEFR_APPROVAL, SAD_CHPP_APPROVAL, SAD_WITH_APPROVAL). In the Admissions Self Service Fluid setup, a user would associate the process ID and the definition ID to a setup sequence number under the high level keys of Institution, Career and Term. By linking the Definition ID to a sequence, the user can tailor which definition to invoke for the user list, workflow processing, and notifications.

For more information on the Setup Process Definition page, see *PeopleSoft Approval Framework*, Setting Up Approval Framework Process Definitions, Defining the Setup Process Definitions Component.

Create email templates for the approval transaction

Use the Generic Template Definition page (**Enterprise Components >Approvals >Approvals >Approval Process Setup**) to create a notification template. The notification template allows notifications to be deployed within an approval flow.

Campus Solutions delivers a generic template for each approval transaction: SAD_DEFR_ROUTING, SAD_CHPP_ROUTING, SAD_APPWTHDRW_ROUTING.

You can use the delivered generic templates as is, or use them as examples when you create a new notification message. Each template uses the SQL identifier SAD_AWE_GEN_EMAIL_BIND. The SQL identifier extracts data to get content for the email. The SQL must accept bind inputs equal to the number of keys at the notification level. For example, header or line keys. You can use the SQL identifier for any new template.

For more information on the Generic Template Definition page, see *PeopleSoft Approval Framework*, Defining Notification Templates and Users for Approval Framework, Defining Notification Templates for Approval Framework.

Maintain user list definitions for the approval transaction

Use the User List Definition page (**Enterprise Components >Approvals >Approvals >User List Setup**) to define users for the approval framework.

A user list is a collection of users (PeopleSoft Operator IDs) expressed as the result of an SQL statement, PeopleSoft role, or PeopleSoft Application Class. User lists are used to represent the business process of your approval hierarchy on a transaction-by-transaction basis. As an example, Campus Solutions delivers one user list: SAD_SAMPLE_APPRV. This list is based on the role of CS – Administrator. It is expected that you will want to create distinct user lists which make sense for the approval transaction definition.

For more information on:

- the User List Definition page, see *PeopleSoft Approval Framework*, Defining Notification Templates and Users for Approval Framework, Defining Users for Approval Framework.
- administering and monitoring approvals, see *PeopleSoft Approval Framework*, Using the Approval Monitor.

Set up the appropriate permission lists, roles, and web libraries

Use the PeopleTools security components to set up the applicable permissions lists, roles, and web libraries.

Campus Solutions delivers the AWE Administrator role so that administrative users can use the Approval Framework. The HCCPSCAW1010 permission list is assigned to this role, but the role is not attached to any user (as delivered). If you do not have an application-specific administrator role, then you can use this role by associating with any of your administrator users. If you do have an application-specific administrator role within your organization, then Campus Solutions recommends that you associate the HCCPSCAW1010 permission list to that role.

For approvers who should take action on an approval request, their user profile must:

- Be associated with a role to view the approval request, and access must be granted in the user list and definition setup.
- Have access to the component to view the approval request. This can take two forms:
 - For PeopleSoft Fluid User Interface, the role of Approvals Fluid must be granted.
 - For classic user interface, a role or permission list must be granted to access the menu SAD_REQ_APPROVAL, and components SAD_REQ_DEFR, SAD_REQ_CHPP, SAD_REQ_WITH.

For information on PeopleTools security components, see *PeopleTools: Security Administration*.

Related Links

[Approving Admissions Transactions Using PeopleSoft Fluid User Interface](#)

"Managing Applications Using PeopleSoft Fluid User Interface" (Campus Self Service)

Approving Admissions Transactions Using PeopleSoft Fluid User Interface

The PeopleSoft Approvals feature provides a way for approvers to take Application Workflow Engine (AWE) actions on PeopleSoft transactions pending their approval, but can do so using any device.

To use the Fluid Approvals feature, applications must utilize the Enterprise Components – Approval Framework technology, also known as Approval Workflow Engine (AWE). This technology comprises Enterprise Objects Approval Workflow (EOAW), Application Workflow Engine (AWE), and Enterprise Objects Page Composer (EOPC). All transactions must be created in the database and adhere to the Approval Framework logic and configuration within each application.

Because Fluid Approvals uses EOPC, transaction entries must be created in the Mobile Approvals Options component, Transactions page (**Enterprise Components >Approvals >Approvals >Mobile Approval Options**). Campus Solutions delivers Page Composer compositions for each approval transaction as well as the underlying setup in the Page Composer Administrator. These compositions can be used as delivered. Page Composer does allow for user changes to the layout, style, or formatting so you can modify the compositions as necessary.

To use the Approvals feature, you must use PeopleTools 8.54.27 and higher *or* PeopleTools 8.55.10 and higher.

This section describes how to access the approval pages and which pages to use to approve admissions transactions.

Related Links

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

Pages Used to Approve Admissions Transactions Using PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Approvals Tile (Fluid Approvals)	HMAP_APPR_TILE_FL	Access the approvals pages and review pending and historical approval requests. This tile is delivered as part of Enterprise Components and Approvals Framework. To deploy and access this tile, users must have the Approvals Fluid role. Like any tile, as long as security is granted, the tile can be included on any home page. Campus Solutions does not associate this tile with a specific home page.
Pending Approvals	EOAWMA_MAIN_FL	Lists pending approval requests requiring the attention of the logged-in manager.

Page Name	Definition Name	Usage
Pending Approvals - <Transaction Details>	EOAWMA_TXNHDTL_FL	Review the approval request details, enter a comment, and approve, deny, or push back the request.
Approvals History	EOAWMA_MAIN_FL	Lists approvals you have worked on in the past.
Approvals History - <Transaction Details>	EOAWMA_TXNHDTL_FL	View details about an approval request you have already worked on.

Approving Admissions Transactions Using Classic User Interface

This section discusses which pages approvers use to approve or deny requests for deferral, changes to program or plan, or withdrawal using the classic interface.

Pages Used to Approve Admissions Transactions Using Classic User Interface

Page Name	Definition Name	Navigation	Usage
Approval for Deferral Request	SAD_REQ_DEFR	Student Admissions >Applicant Request >Approval	View the status and details of approval transactions requests, approve or deny the request.
Approval for Change Prog/ Plan	SAD_REQ_CHPP	Student Admissions >Applicant Request >Approval	View the status and details of approval transactions requests, approve or deny the request.
Approval for Withdraw Request	SAD_REQ_WITH	Student Admissions >Applicant Request >Approval	View the status and details of approval transactions requests, approve or deny the request.

Using Admission Applications Web Services

Understanding AAWS

Admission Applications Web Services (AAWS) can be used by end user devices (such as a browser or a PDA), enterprise applications or any other third party software that can interface through standards based means.

AAWS can be used by:

- Oracle presentation technologies, such as Portal, Application Development Framework (ADF), and PeopleSoft components and pages.
- Oracle middleware (such as Enterprise Service Bus and BPEL).
- Oracle Applications (such as Enterprise, EnterpriseOne, and E-Business Suite).
- Third party presentation technologies
- Third party middleware and applications.

Different academic institutions have different needs for capturing admission application data. Also, application data can vary within the same academic institution between various campuses, departments, careers, and types of applicants. For example, application data for international and domestic applicants can vary within the same institution. This creates the need for institutions to develop their own online application user interface that can interact with the Campus Solutions system. With AAWS, institutions can connect their online application with the Campus Solutions system.

AAWS provides the SAD_ADMISSIONS service that enables access to the Campus Solutions Recruiting and Admissions functionality. The SAD_ADMISSIONS service provides the following service operations:

Service Operation	Description
SAD_CREATEAPP	Create admission application
SAD_SAVEAPPL	Save admission application
SAD_SUBMITAPPL	Submit admission application
SAD_GETAPPLS	Get admission applications

Service Operation	Description
SAD_GETAPPL	Get admission application
SAD_GETATTACH	Get admission attachments.

With these service operations, AAWS offers functionality in the following areas:

- Admission Applications: Users, such as applicants, can use an online application user interface to:
 - Create admission applications in the Campus Solutions system.
 - Save, update, or submit the applications.
 - Retrieve an application to make further updates.
- Application Attachments: Online application users can associate attachments of various formats with an admission application. Administrators can track these attachments using the Application Transactions and Maintain Application components.

Note that when an online application invokes SAD_SAVEAPPL or SAD_SUBMITAPPL service operation, the system generates an admission transaction. This admission transaction contains the admission application data that the user has saved or submitted. An admission transaction is defined and configured using the CTM pages and Application Configuration component. You can use the delivered Application Transactions and CTM Constituent Staging components to review, edit, and post the application and applicant data in an admission transaction. Additionally, you can choose to post the transactions in batch.

Constituent Transaction Management (CTM), which is a Campus Community feature, provides the following two service operations related to New User Registration (NUR):

Service Operation	Description
SCC_USERREG_CREATEACCT	Create user account
SCC_USERREG_AUTHENTICATE	Authenticate user

You can use these NUR service operations to:

- Provide usernames and passwords for access to your online application.
- Authenticate users who want to retrieve a saved application for further edits and submission.

The List of Values framework is also a Campus Community feature. The framework provides the SCC_GET_LOV service operation. An online application can use this service operation to retrieve the list of values from the Campus Solutions system for data entry fields on the online application. This is useful only if the online application user interface is built outside of your Campus Solutions system.

<i>Service Operation</i>	<i>Description</i>
SCC_GET_LOV	Get List of values

AAWS uses the following Student Financials payment integration service operations to enable application fees calculation and payment:

<i>Service Operation</i>	<i>Description</i>
SSF_INITIATE_EPAYMENT	Initiate an ePayment.
SSF_COMPLETE_EPAYMENT	Complete an ePayment.

All of these service operations use PeopleTools Integration Broker for interacting with the online application. Any online application user interface that is web-service enabled and SOAP compliant can access these service operations. AAWS adheres to open web service standards supported in PeopleTools.

Before developing your online application user interface, we recommend that you use a SOAP service tester to become familiar with how the web services processes the admission application data and user information. One way to use a service tester could be by first passing the input parameters to a service operation and then viewing the service operation output.

Assessing Staff Skills

Developers working on the implementation of AAWS should have strong skills in:

- A tool or technology to build and deploy an online application user interface.
- PeopleSoft Integration Broker.
- PeopleCode.
- Web services concepts mainly XML, SOAP, and WSDL.
- Campus Community Entity Registry functionality.
- Recruiting and Admissions functionality.
- Campus Community Constituent Transaction Management functionality.

Setups for AAWS

The key setup areas that apply to AAWS are:

- PeopleTools Integration Broker.
- Campus Community Constituent Transaction Management (CTM).
- Campus Community Entity Registry.

- Application Configuration (Configuring admission transactions).
- Campus Community List of Values.
- Attachments URL.
- Hosted Payment.

See Also

The following documentation should be reviewed as part of your AAWS implementation

- [What is SOLA](#)
- AAWS Documentation - Proactive Information and Known Issues in My Oracle Support (ID 1427475.1)
- [Understanding Admission Transactions](#)
- "Using the SSF_EPAYMENT_TRANS Web Service" (Student Financials)
- "Understanding CTM" (Campus Community Fundamentals)
- "Understanding New User Registration" (Campus Community Fundamentals)
- "Understanding Entity Registry" (Campus Community Fundamentals)
- How to Test AAWS and Hosted Payment SSF_INITIATE_EPAYMENT Service Operation Tester in My Oracle Support (ID 1349409.1)
- "Understanding the Generic Service Tester" (Campus Community Fundamentals)
- "Understanding Get List of Values Web Service Operation" (Campus Community Fundamentals)
- Product documentation for *PeopleTools: Integration Broker*

AAWS and List of Values Framework

An online application user interface that you construct outside of the PeopleSoft Campus Solutions database may contain data fields that have predefined or prompt values. The user interface can use such fields to control and streamline data entry for the user. You set up these values in the PeopleSoft Campus Solutions database. To display these values on the user interface, whether it is for a prompt field or a field that contains translate values, you can use the List of Values service (SCC_GET_LOV). The service recognizes and provides the values that are used to populate drop-down list boxes and for validating selections on a user interface.

CTM Self-Service and Administrator Modes

In the Self-Service mode, an applicant creates and submits an admission application through AAWS. In the Administrator mode for AAWS, the administrative user creates and submits an application on behalf of an applicant. The administrator may create the application for an existing EMPLID (if the

administrator knows the applicant's ID when creating the application), or for an unknown or new applicant.

In the Administrator mode, the system associates the application with the administrator's user ID. You can view this association on the Application Transactions component when reviewing the submitted applications. In other words, you can use the Application Transactions component to see which administrator has created an application for an applicant.

In the Self-Service mode, the system associates the application with the applicant's user ID.

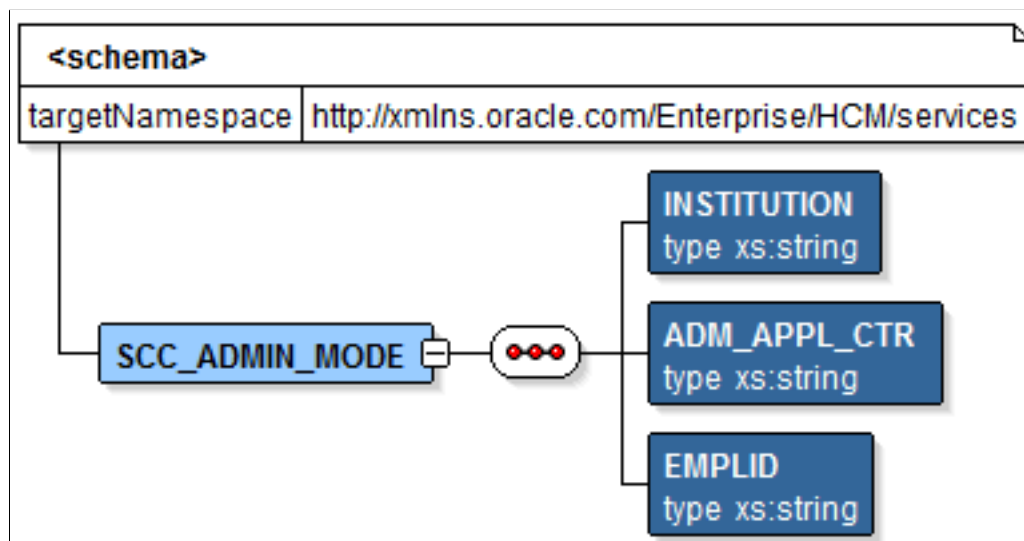
In the Administrator mode, the user must provide an institution and application center to create an application. The system enforces application center and academic structure security for the administrative user.

If an administrator saves an application, another administrator cannot submit it through AAWS. However, the other administrator can use the Application Transactions staging component to update the application status to submitted and post the application.

In the Administrator mode, the Get Applications service operation call returns only in-progress applications, that is, applications which have not been posted or cancelled. It is optional for an administrator to provide an EMPLID for a Get Applications call. If the administrator does not provide an applicant's EMPLID, the system returns all the in-progress applications.

The Administrator mode is activated by the presence of optional tag <SCC_ADMIN_MODE> in an incoming message.

This image shows the SCC_ADMIN_MODE parameters.



For example, the following is a request message for the service operation SAD_CREATEAPPL that contains the SCC_ADMIN_MODE tag:

```

<?xml version="1.0"?>
<SAD_CREATEAPPL_REQ xmlns="http://xmlns.oracle.com/Enterprise/HCM/services">
  <SCC_ADMIN_MODE>
    <INSTITUTION>PSUNV</INSTITUTION>
    <ADM_APPL_CTR>BUSN</ADM_APPL_CTR>
  </SCC_ADMIN_MODE>
  <COUNTRY></COUNTRY>
  <CITIZENSHIP_STATUS></CITIZENSHIP_STATUS>
  <PREFERENCES>

```

```
<PREFERENCE>
  <INSTITUTION>PSUNV</INSTITUTION>
  <ACAD_CAREER>BUSN</ACAD_CAREER>
  <ACAD_PROG>GRFIN</ACAD_PROG>
  <ACAD_PLAN>FINANC-MBA</ACAD_PLAN>
  <ACAD_SUB_PLAN></ACAD_SUB_PLAN>
  <ADMIT_TYPE>FYR</ADMIT_TYPE>
  <ADMIT_TERM>0630</ADMIT_TERM>
</PREFERENCE>
</PREFERENCES>
</SAD_CREATEAPPL_REQ>
```

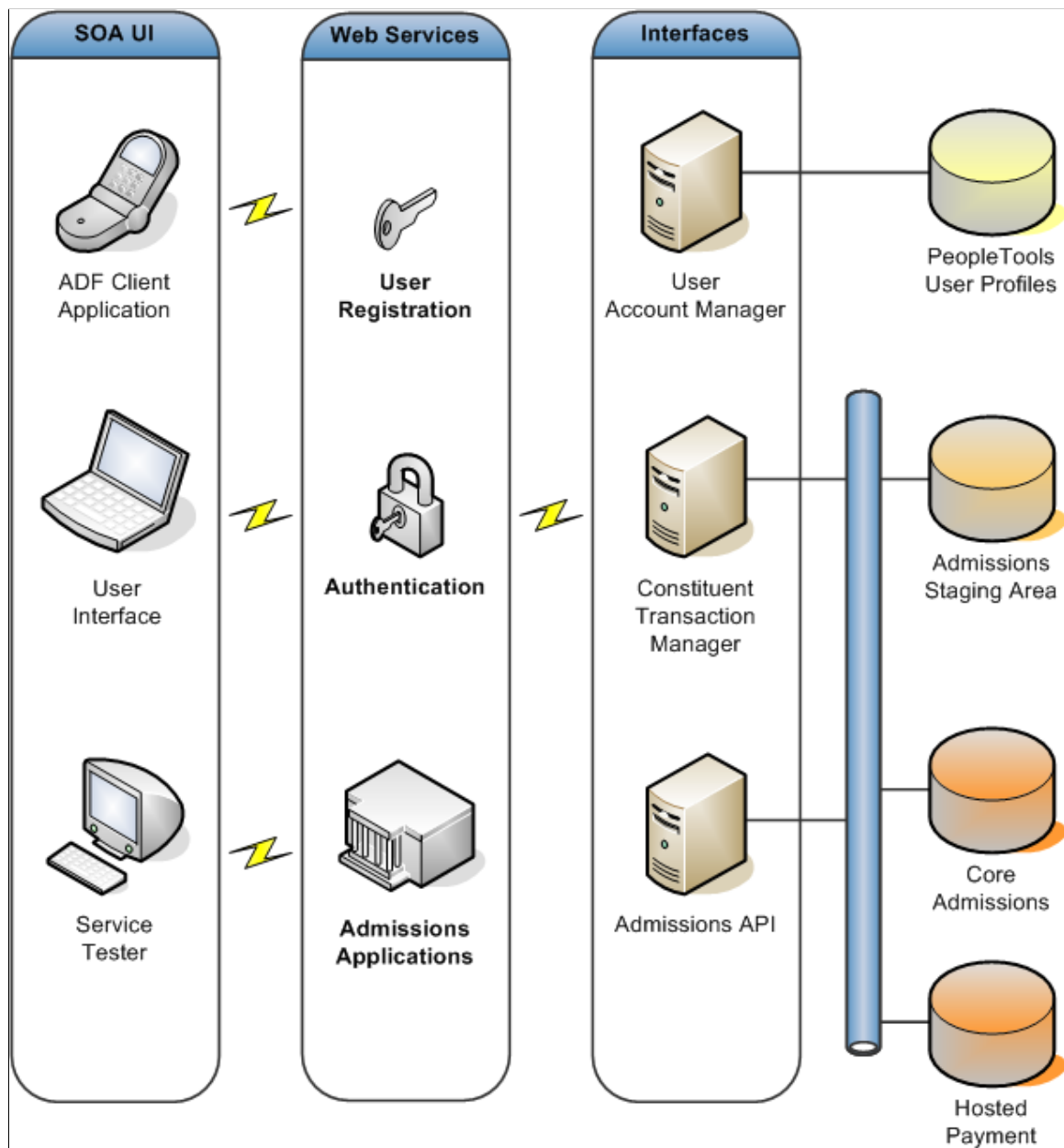
Integration with Other Campus Solutions Components

AAWS interacts with the following Campus Solutions components:

- User Account Manager
- Constituent Transaction Manager
- Admissions API
- Student Financials Hosted Payment

This section discusses the application packages and classes for these components. If you want to customize AAWS, you may need to modify some of these classes and packages. For instance, if you want to integrate a non PeopleSoft user management system with AAWS, a new application class should be created that implements `SCC_IDENTITY_MGR:INTFC:IIdentityManager`. The application class must then be added to the table `SCC_IDM_INST`.

This diagram illustrates that AAWS architecture is composed of SOA UI, web services for user registration, authentication and admission applications, and the User Account Manager, Constituent Transaction Manager and Admissions API interfaces.

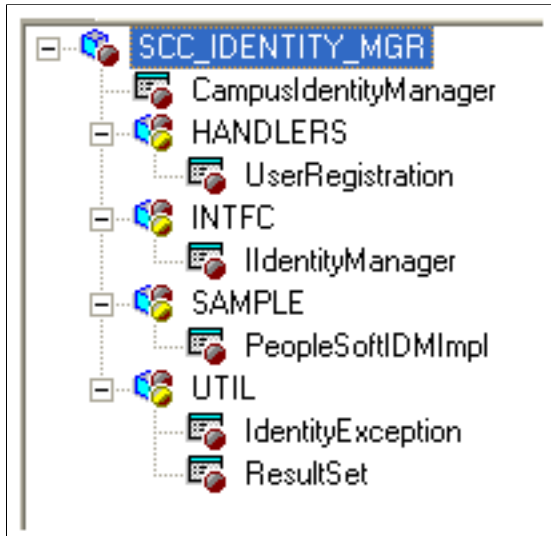


User Account Manager

The user registration and authentication web service operations interact with User Account Manager to register and authenticate the end user. PeopleTools User Profile, by default, stores the user account information.

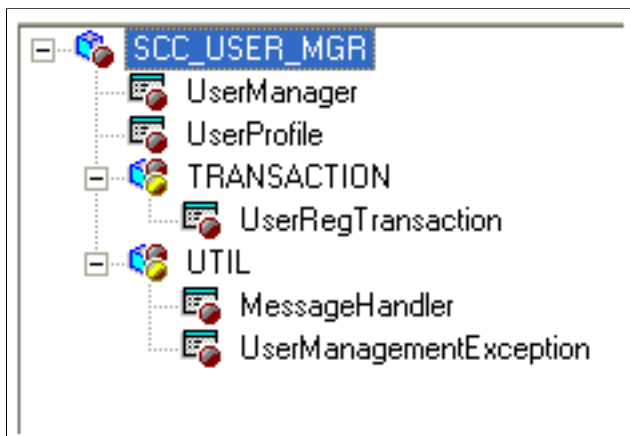
The User Account Manager component contains a number of sub-modules including the Campus Identity Manager and the User Manager. The following graphics show the core application packages and classes which support the User Account Manager:

This image illustrates the Campus Identity Manager.



Class	Description
CampusIdentityManager	Manages all aspects of Self Service Transactions interactions with any configured Identity management system or New User Registration module. Call getInstance() on this class to get access to a concrete IDM implementation.
HANDLERS:UserRegistration	Implements the User Registration Web Service, the register & authenticate operation.
INTFC:IIdentityManager	Represents the functionality available through any typical generic Identity Manager product. All access to IDM functions will occur through this interface whether from code level API calls or webservices.
SAMPLE:PeopleSoftIDMImpl	The peoplesoft default implementation of IIdentityManager. Performs all Identity Management tasks against the peoplesoft db.
UTIL:IdentityException	All exceptions generated from within the IdentityManager interface should extend this class.
UTIL:ResultSet	Represents a tabular data object that is the basis for many of the Identity Manager operations.

This image illustrates the User Profile Manager.



Class	Description
UserManager	Main API for user manager.
UserProfile	A data object to store user profile information.
TRANSACTION:UserRegTransaction	This handles the posting activities for User Registration sourced data as directed by the Constituent Staging framework. Note: This is not the implementation currently used.
UTIL:MessageHandler	Handles any messages, warnings, errors generated during User Management.
UTIL:UserManagementException	All exceptions generated from within the UserManager interface should extend this class.

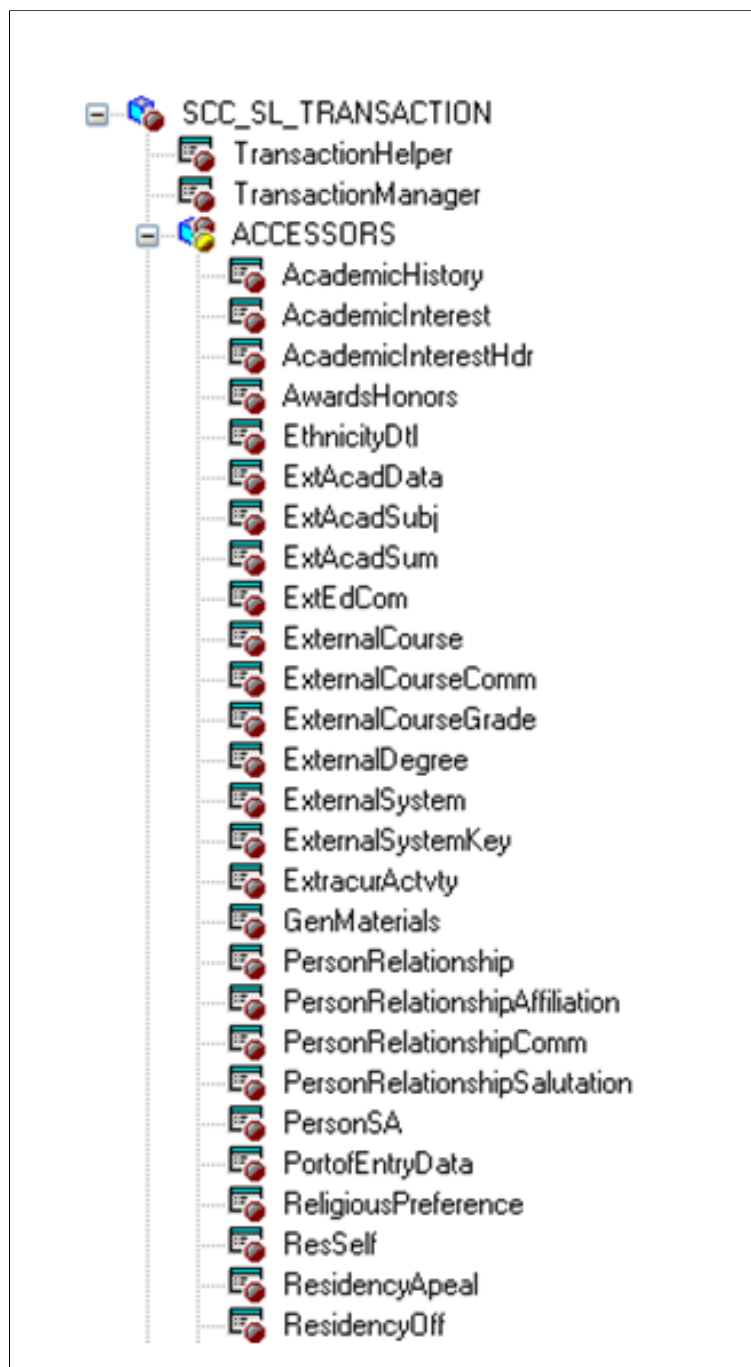
Constituent Transaction Manager

Constituent Transaction Manager handles the admission application and applicant data that AAWS receives and sends to the user interface. When the user interface submits the application and applicant data, AAWS transmits this data to the Constituent Transaction Manager. The Constituent Transaction Manager stores this data in Campus Solutions staging tables.

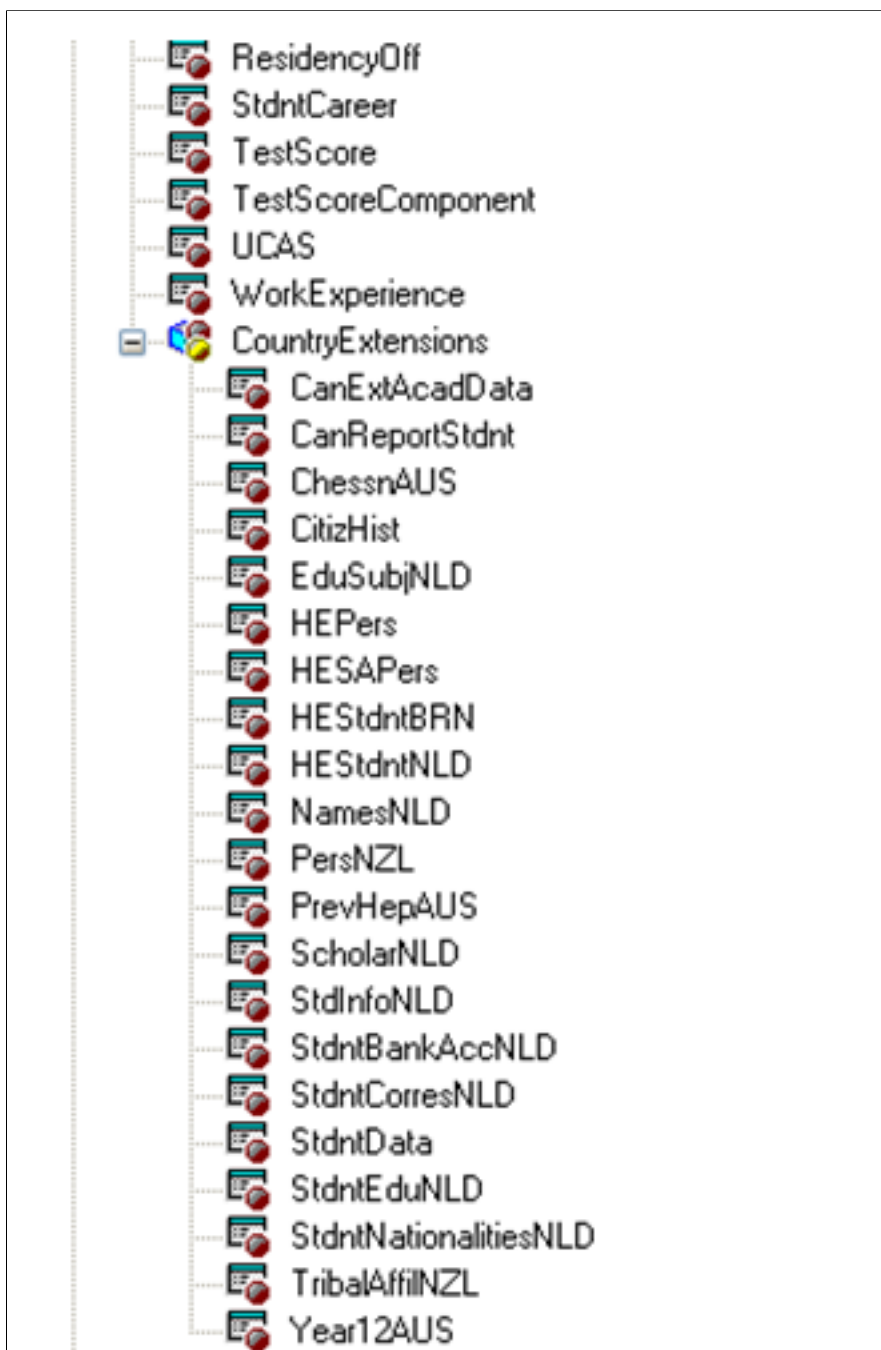
Constituent Transaction Manager is composed of a number of application classes and PeopleTools components which support the staging and loading of constituent (applicant) and related transaction (application) data into staging tables.

The following graphics show the application packages and classes in the Constituent Transaction Manager component:

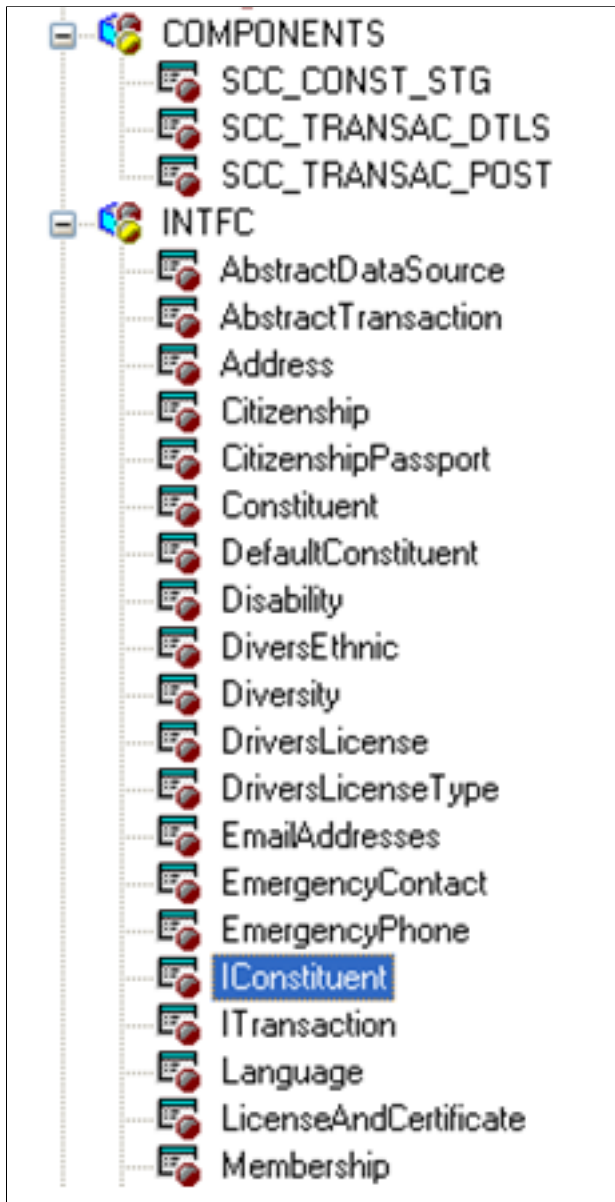
This image illustrates the Constituent Transaction Manager (1 of 4).



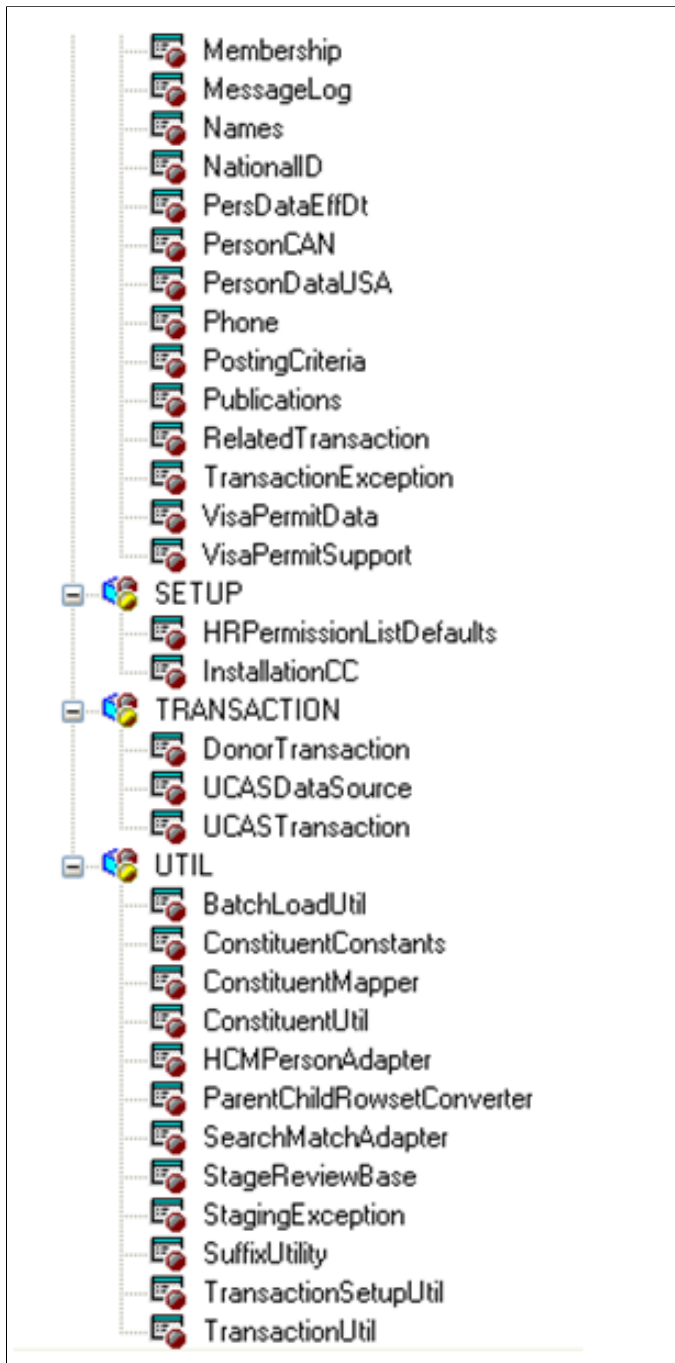
This image illustrates the Constituent Transaction Manager (2 of 4).



This image illustrates the Constituent Transaction Manager (3 of 4).



This image illustrates the Constituent Transaction Manager (4 of 4).



Admissions API

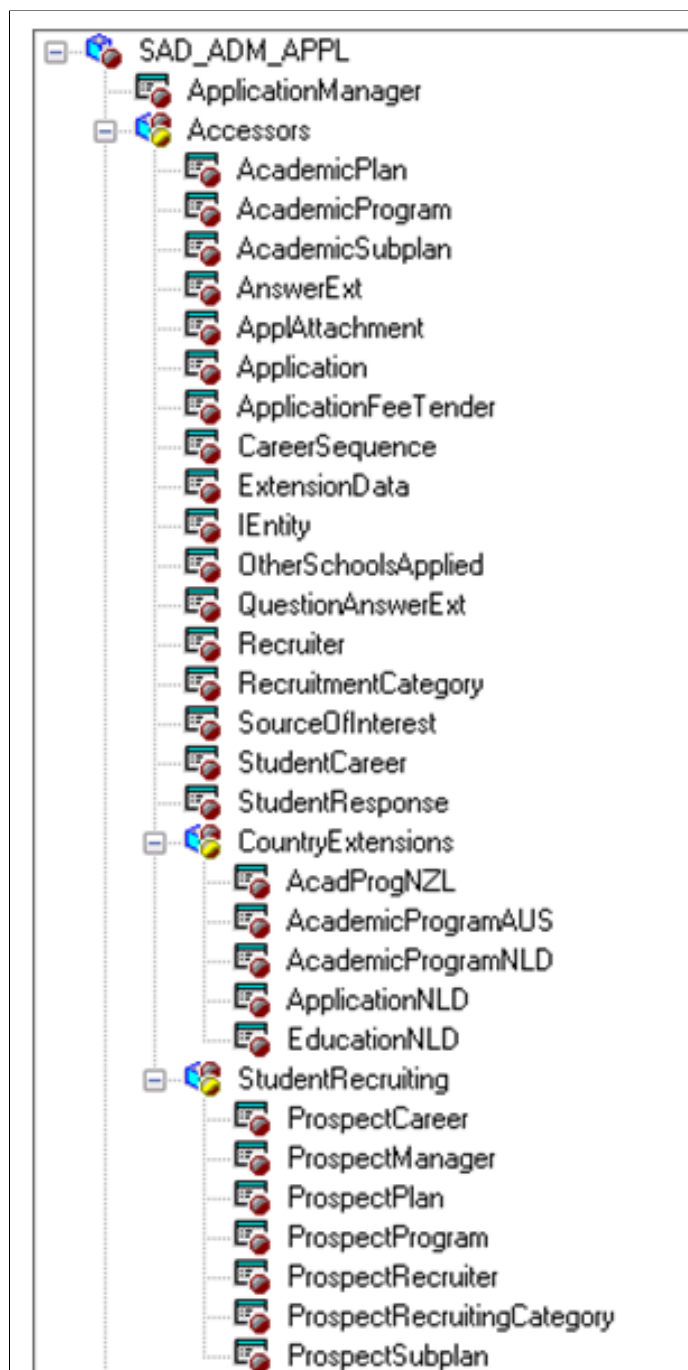
The Admissions Applications Programming Interface (API) moves the application data from the staging tables to the core Recruiting and Admissions tables.

The API supports the creation, modification, and submission of online admission applications. The API is an Object Oriented (OO) based application class hierarchy that represents the admission applications. The class hierarchy contains an Application Manager API that performs key functions with application data.

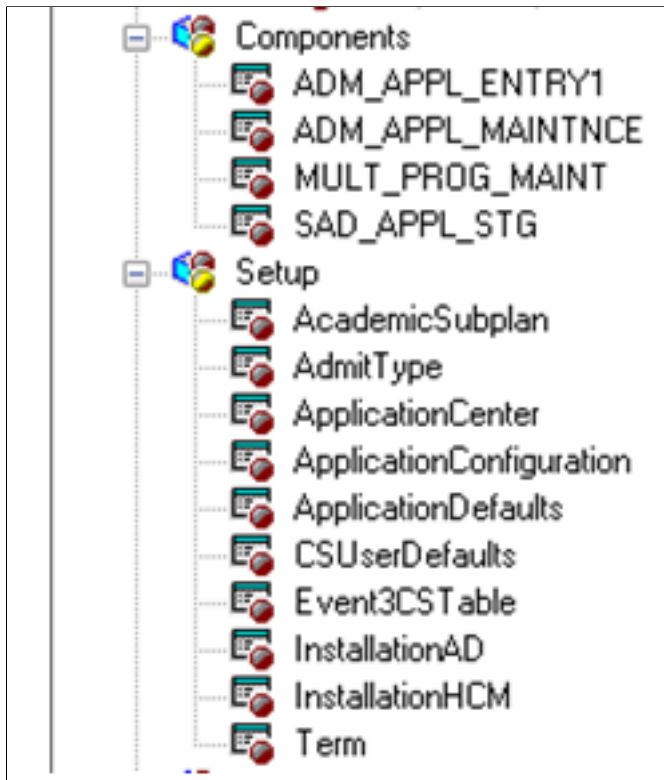
The API also supports the calculation of Application Fees via integration to the Application Fee hosted payment processing.

The following graphics show the application packages and classes in the Admission Applications Manager component:

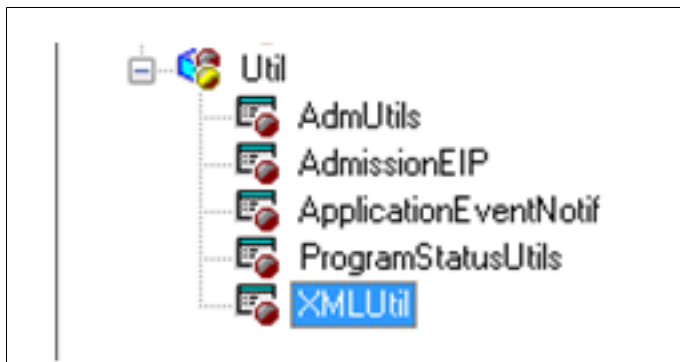
This image illustrates the Admission Applications Manager (1 of 3).



This image illustrates the Admission Applications Manager (2 of 3).



This image illustrates the Admission Applications Manager (3 of 3).



The Entity Registry feature enables academic institutions to create their own application data extensions (that is, you can add entirely new application child entities).

AAWS and Entity Registry

AAWS uses the Entity Registry feature to exchange data between the Campus Solutions system and the online application.

This section discusses the delivered Application and Constituent entities.

Application

The message SCC_ENTITY_APPLICATION contains the complete view of an admission application. The message uses the schema generated by the Application entity. The system derives the Application entity from the complete set of data available within the Campus Solutions Recruiting and Admissions core data model. Use the PeopleTools Schema page to access the SCC_ENTITY_APPLICATION message schema (**PeopleTools >Integration Broker >Integration Setup >Messages >Schema**).

Constituent

The message SCC_ENTITY_CONSTITUENT represents the core constituent information associated with the person processed through AAWS. The system derives the Constituent entity from the complete set of person related data available in both the Campus Solutions and Human Resources person data models.

Use the PeopleTools Schema page to access the SCC_ENTITY_CONSTITUENT message schema (**PeopleTools >Integration Broker >Integration Setup >Messages >Schema**).

AAWS Service Operations

This section discusses the AAWS service operations that are delivered under the service called SAD_ADMISSIONS.

Note: The schema diagrams in this section are subject to change as needed.

Note: This section includes information about posting data within Campus Solutions. If you implement HCM, person data may also be posted to the HCM system.

Read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations. See:

"Integrating Person Data" (Campus Solutions Application Fundamentals)

"Integrating Setup Data" (Campus Solutions Application Fundamentals)

"Monitoring Integrations Using the Integrity Utility" (Campus Solutions Application Fundamentals)

See *Campus Solutions to Human Capital Management Integration* in My Oracle Support (ID 1553319.1).

SAD_CREATEAPPL

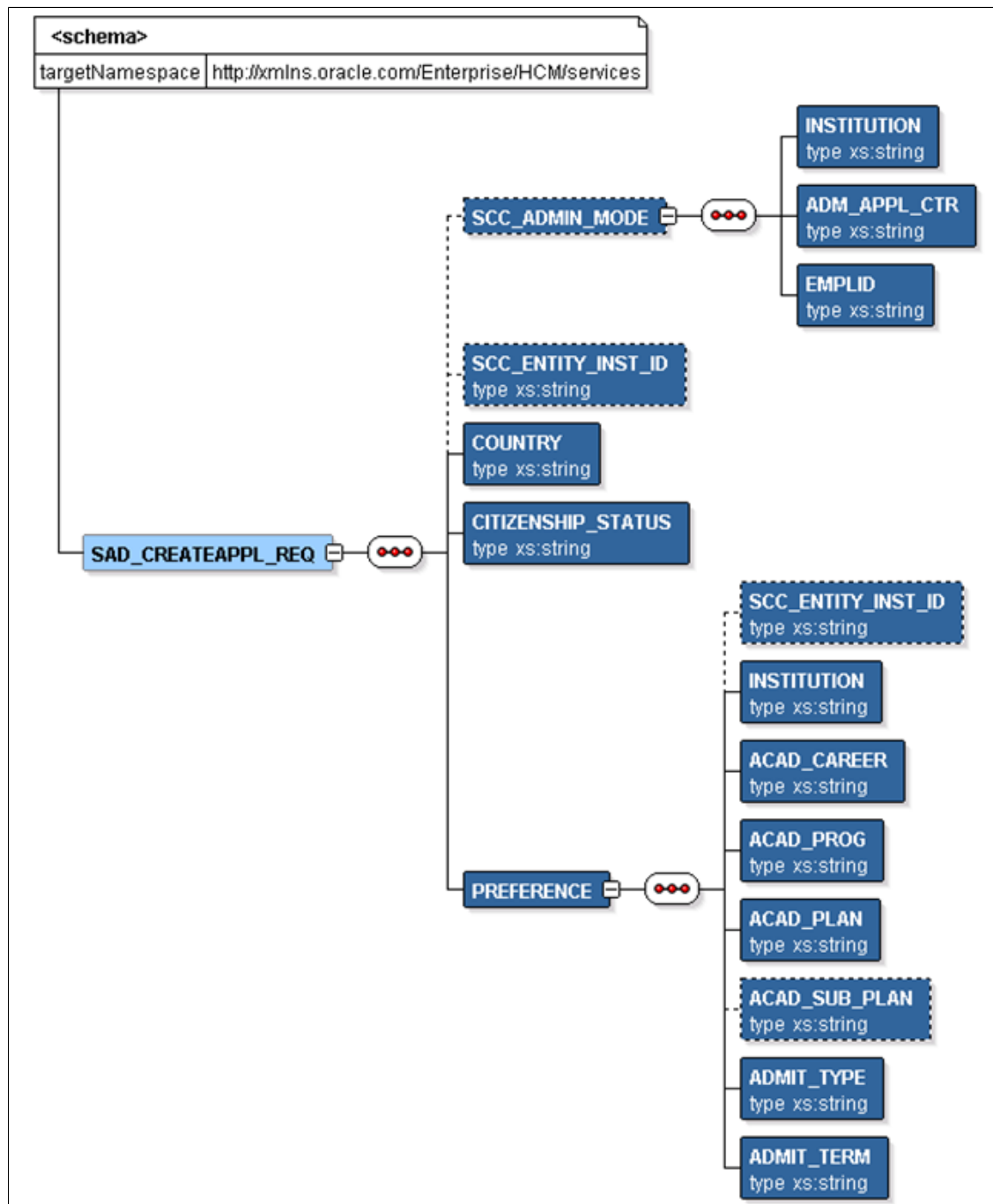
This service operation enables the online application user to create an admission application in the Campus Solutions system. Using this service may result in one or more applications being created. It can also result in multiple applicant preferences being created within the same application, for example, entry of another program or plan for an existing application is a preference.

Create Application Service Operation Description and Features	Details
Description	<p>The Create Application service operation call results in one or more admission applications being initialized. The application center settings on the Application Configuration component control whether multiple applications (or preferences) can be created. For example, if you do not have an application center set up for an applicant who selects an Undergraduate career, Liberal Arts program, and History plan, the service operation throws an error.</p> <p>The service operation populates the admission application fields based on the settings on the User Defaults and Installation - AD components. At application creation time the operation does not physically save the data to the admissions staging tables. The save process does not occur until a later point in time when the user selects a save or submit option on the online application. Therefore, this operation is more concerned with the initialization of an application, driven by configuration, rather than creating a physical application in the database.</p>
Users	<ul style="list-style-type: none"> • An applicant using an online application. • An administrator using an online application for creating an application on behalf of an applicant who has or does not have an EMPLID.
Processing	<p>The service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate that the user is authenticated (and is not a Guest) 2. If Administrator mode then: <ul style="list-style-type: none"> • Validate the required input administrator parameters. • Validate that the administrator is authorized to access the application center, institution, career, program and plan. 3. Validate the required input parameters for application creation. 4. Determine the transaction that must be used to process the Institution/Academic Career combination. Define transactions on the Transaction Setup page. 5. Begin a new transaction for the request. Assign a new TEMP_ID to the constituent. 6. Using the supplied input parameters, look up the Application configuration component settings to determine how many application preferences should be created for this request. 7. Return response through the output parameters.

Create Application Service Operation Description and Features	Details
Output	After processing, the operation creates an admission application with default data and preferences. The user can subsequently update and submit this application through the Save and Submit service operations.
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none">• User is not authenticated (for example, if an anonymous Guest tries to sign into the online application, the service throws an error message).• Administrative user is not authorized to access the application center, institution, career, program or plan.• Required input parameters have not been supplied by the user (see the graphic titled SAD_CREATEAPPL_REQ Message Parameters and the "AAWS and Entity Registry" section).

Input Message: SAD_CREATEAPPL_REQ

This image shows the input parameters that the SAD_CREATEAPPL service operation receives:



Required data that the online application must supply to the service operation in Non-administrator (Applicant) mode:

- Institution
- Academic Career
- Admit Term

- Academic Program
- Academic Plan

Required data that the online application must supply to the service operation in Administrator mode:

- Institution
- Admission Application Center
- Academic Career
- Admit Term
- Academic Program
- Academic Plan
- Country and Citizenship Status (if your application mapping requires them).

The following is an example of the SAD_CREATEAPPL_REQ message that the SAD_CREATEAPPL service operation receives from an online application:

```
<?xml version="1.0"?>
<SAD_CREATEAPPL_REQ>
  <COUNTRY>AUS</COUNTRY>
  <PREFERENCE>
    <INSTITUTION>PSUNV</INSTITUTION>
    <ACAD_CAREER>UGRD</ACAD_CAREER>
    <ACAD_PROG>AA</ACAD_PROG>
    <ACAD_PLAN>ARTHIST</ACAD_PLAN>
    <ADMIT_TYPE>FYR</ADMIT_TYPE>
    <ADMIT_TERM>0747</ADMIT_TERM>
  </PREFERENCE>
</SAD_CREATEAPPL_REQ>
```

Output Message: SAD_CREATEAPPL_RESP

When the Integration Broker receives the SAD_CREATEAPPL_REQ message, it responds with the SAD_CREATEAPPL_RESP message.

This image shows the output parameters that the SAD_CREATEAPPL service operation passes to the online application.



Note that the SAD_CREATEAPPL_RESP schema includes the Application entity (ADM_APPL_DATA) and Constituent entity XSD schemas.

The following is an example of the SAD_CREATEAPPL_RESP message that the SAD_CREATEAPPL service operation transmits to the online application:

```
<?xml version="1.0"?>
<SAD_CREATEAPPL_RESP>
  <PREFERENCE>
    <ADM_APPL_DATA>
      <!-- Application data shape -->
    </ADM_APPL_DATA>
  </PREFERENCE>
</SAD_CREATEAPPL_RESP>
```

```

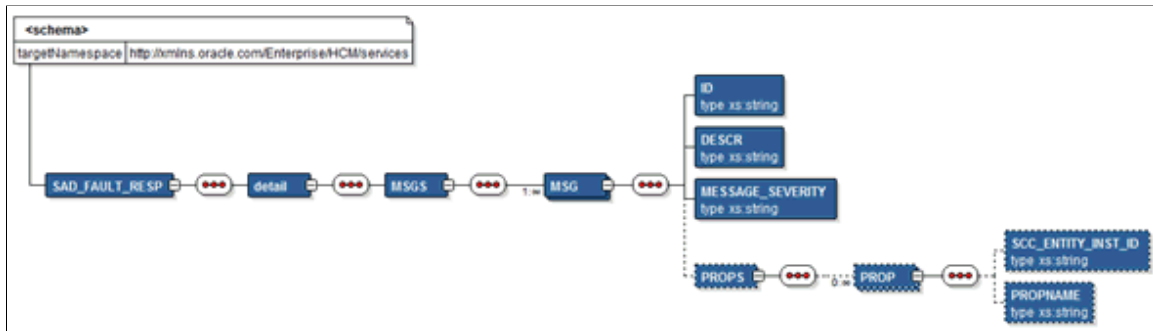
</ADM_APPL_DATA>
<CONSTITUENT>
  <!-- Constituent data shape -->
</CONSTITUENT>
</PREFERENCE>
</SAD_CREATEAPPL_RESP>

```

Fault Message: SAD_FAULT_RESP

If the service operation encounters an error condition, it responds with the SAD_FAULT_RESP message.

This image shows the SAD_FAULT_RESP message parameters.



The following is an example of the SAD_FAULT_RESP message that the SAD_CREATEAPPL service operation transmits to the online application:

```

<?xml version="1.0" encoding="UTF-8"?>
<SOAP-ENV:Envelope xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:
:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Body>
    <SOAP-ENV:Fault>
      <faultcode>300</faultcode>
      <faultstring>A Error occurred processing this request</faultstring>
      <detail>
        <MSGS>
          <MSG>
            <ID>14200-556</ID>
            <DESCR> Validation error in preference PSUNV/UGRD/AA/MUSIC/VOIC/FYR/069⇒
0</DESCR><PROPS/>
            </MSG>
            <MSG>
              <ID>14200-556</ID>
              <DESCR> Tag ACAD_SUB_PLAN has an invalid value VOIC. Check and try again⇒
n.</DESCR><PROPS><PROP><SCC_ENTITY_INST_ID>PREFERENCE ROW 1</SCC_ENTITY_INST_ID><PR⇒
OPNAME>ACAD_SUB_PLAN</PROPNAME></PROP></PROPS>
            </MSG>
          </MSGS>
        </detail>
      </SOAP-ENV:Fault>
    </SOAP-ENV:Body>
  </SOAP-ENV:Envelope>

```

SAD_SAVEAPPL

This service operation enables the user to save an admissions application to the Campus Solutions system (for later submission). The service operation initially posts the application to the admissions staging

tables. Applications in the staging tables may at some point of time become eligible to be posted to the admissions production tables.

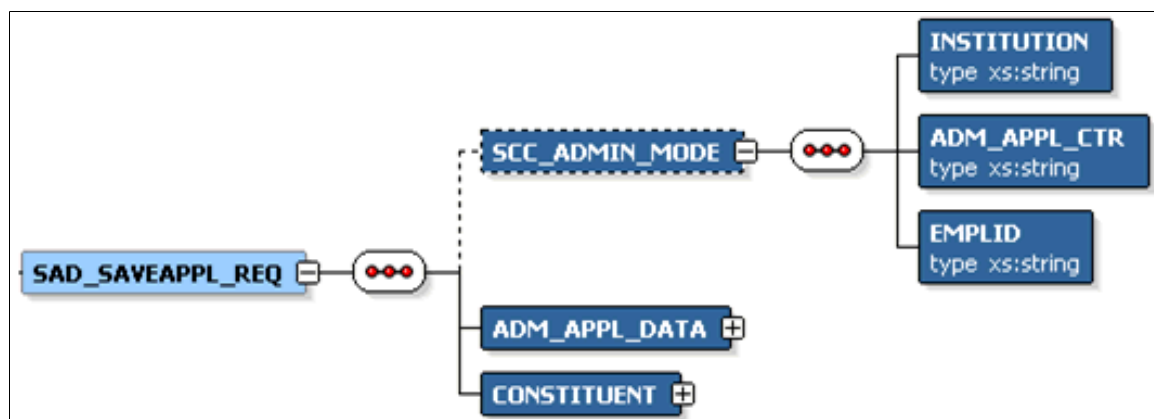
Save Application Service Operation Description and Features	Details
Description	<p>The Save Application service operation call results in the given admissions application being saved to the Campus Solutions system. The application may be partially complete when the online application user decides to use a Save option that triggers a call to this service operation. The service operation saves the application using an Update Via Replacement approach; in other words, the SAD_SAVEAPPL operation deletes any pre-existing application (based on a unique key) for the applicant and then saves the new (or current) version of the application.</p> <p>When saving an application, the operation assigns an application number (ADM_APPL_NBR) to the application for tracking.</p> <p>The application must pass through validation checks before it gets saved.</p> <p>The service operation validates all aspects of the application data including data entered and translate values selected by the user on the online application, and custom business validation rules that the institution has incorporated into the online application.</p> <p>The service operation saves the valid applications to the admissions staging tables. If the constituent (person) who initiated the application save process is known (for example, the constituent has an EMPLID), then the constituent portion of the application is immediately eligible to be posted to the person production tables. Otherwise, the constituent data remains in the staging tables until addressed by an administrator. In any case, the application data itself is saved to the staging tables and is not posted to admissions production tables until a later submit occurs.</p> <p>Applications may include attachments. The online application must encode the attachment in Base64 format before passing the attachment to Campus Solutions.</p>
Users	<ul style="list-style-type: none"> • An applicant using an online application. • An administrator using an online application for creating an application on behalf of an applicant or a student.

Save Application Service Operation Description and Features	Details
Processing	<p>The service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate that the user is authenticated (and is not a Guest) 2. If administrator mode, then: <ol style="list-style-type: none"> a. Validate the required input administrator parameters. b. Validate that the administrator is authorized to access the application center, institution, career, program and plan. c. Use the EMPLID supplied by the administrator for the transaction. 3. Validate that the applicant is authorized to save the application (for example, verify whether the applicant is the same person who created the application in the call to the SAD_CREATEAPPL service operation). 4. If administrator mode, then use the input parameter Application Center value for the application. 5. If applicant mode, then use the input parameters and the settings on the Application Configuration component to assign an application center to the application. 6. To enter the Application Citizenship details, use the applicant details in the input parameters, if necessary. 7. To enter the Constituent Institution (needed for Data Update Rules), use the Admissions Application Institution input parameter value. 8. Validate the constituent and application data using the Constituent and Application entity schemas. 9. Associate the TEMP_ID (assigned during the SAD_CREATEAPPL processing) with the application. 10. Save the validated constituent and application data to the staging tables. 11. Add the assigned ADM_APPL_NBR to the response message. 12. If the constituent is not known to the Campus Solutions system (for example, the applicant does not have an EMPLID): <ol style="list-style-type: none"> a. Run the Search Match process according to the Search Match settings on the Transaction Setup component. b. Add or update a person record according to Search Match configuration and apply the necessary data update rules during this processing.

Save Application Service Operation Description and Features	Details
	13. Create or update a prospect record in the production tables according to the settings on the Application Configuration component.
Output	<p>After completing the processing steps, the service operation:</p> <ol style="list-style-type: none"> 1. Posts the valid application data to the Campus Solutions admissions staging tables. 2. Posts the valid constituent data to the Transaction Manager constituent staging tables. 3. Optionally, creates or updates a person record for a valid application. 4. Optionally, creates a prospect record for a known applicant.
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> • User is not authenticated (for example, if an anonymous Guest tries to sign into the online application, the service throws an error message). • User is not authorized to access the application (for example, if the applicant is trying to access an application created by another applicant). • Application is invalid (that is, the application fails validation processing). • Required input parameters have not been supplied by the user (see the graphic titled SAD_SAVEAPPL_REQ Message Parameters and the "AAWS and Entity Registry" section).

Input Message: SAD_SAVEAPPL_REQ

This image shows the input parameters that the SAD_SAVEAPPL service operation receives from an online application.



Note that the SAD_SAVEAPPL_REQ schema includes the Application entity (ADM_APPL_DATA) and Constituent entity XSD schemas.

Required data that the online application must supply to the service operation in Non-administrator (Applicant) mode:

- ADM_APPL_DATA
- CONSTITUENT

Required data that the online application must supply to the service operation in Administrator mode:

- Institution
- Admission Application Center
- ADM_APPL_DATA
- CONSTITUENT

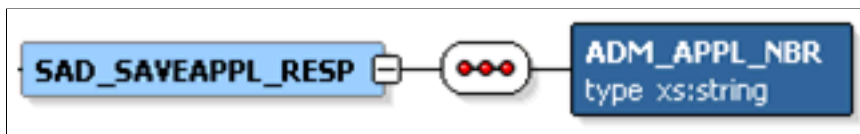
The following is an example of the SAD_SAVEAPPL_REQ message that the SAD_SAVEAPPL service operation receives from an online application:

```
<?xml version="1.0"?>
<SAD_SAVEAPPL_REQ>
  <ADM_APPL_DATA>
    <!-- Application data shape -->
  </ADM_APPL_DATA>
  <CONSTITUENT>
    <!-- Constituent data shape -->
  </CONSTITUENT>
</SAD_SAVEAPPL_REQ>
```

Output Message: SAD_SAVEAPPL_RESP

When the Integration Broker receives the SAD_SAVEAPPL_REQ message, it responds with the SAD_SAVEAPPL_RESP message.

This image shows the output parameters that the SAD_SAVEAPPL service operation passes to the online application.



The following is an example of the SAD_SAVEAPPL_RESP message that the SAD_CREATEAPPL service operation transmits to the online application:

```
<?xml version="1.0"?>
<SAD_SAVEAPPL_RESP>
  <ADM_APPL_NBR>00023456</ADM_APPL_NBR>
</SAD_SAVEAPPL_RESP>
```

Fault Message: SAD_FAULT_RESP

Refer to the SAD_FAULT_RESP message example in the SAD_CREATEAPPL section.

SAD_SUBMITAPPL

This service operation enables the user to submit a completed admissions application to the Campus Solutions system. The service operation initially saves the applications to the admissions staging tables and subsequently posts the staged application data to the admissions production tables.

<i>Submit Application Service Operation Description and Features</i>	<i>Details</i>
Description	<p>The Submit Application service call results in the given admissions application being submitted to the Campus Solutions system. The application must be complete (according to the institution's data capture requirements). The online application user interface and the underlying Campus Solutions data model ensure that the submitted admission application is complete.</p> <p>The application submit process involves first validating the data, then saving the data to the admissions staging tables, and finally transferring the staged data into the admissions production tables.</p> <p>When initially saving the application to the staging tables, if the application does not have an application number, the service operation assigns an application number (ADM_APPL_NBR) to the application for tracking purpose. The operation does not assign an application number if another operation (for example, the SAD_SAVEAPPL operation) has already assigned an application number.</p> <p>The admission application must pass through validation checks before it gets submitted. The service operation validates all aspects of application data including data entered and translate values selected by the user on the online application and custom business validation rules that the institution has incorporated into the online application.</p> <p>If the constituent who initiated the application submit process is known to the Campus Solutions system (for example, the constituent has an EMPLID), then the constituent and application data is eligible to be posted to the admissions and person production tables. Otherwise, the application remains in the staging tables until addressed by an administrator.</p> <p>When configured to do so, the constituent can pay an application fee and/or request an application fee waiver.</p> <p>Applications may include attachments. The online application must encode the attachment in Base64 format before passing the attachment to Campus Solutions.</p>
Users	<ul style="list-style-type: none"> • An applicant using an online application. • An administrator using an online application for creating an application on behalf of an applicant or a student.

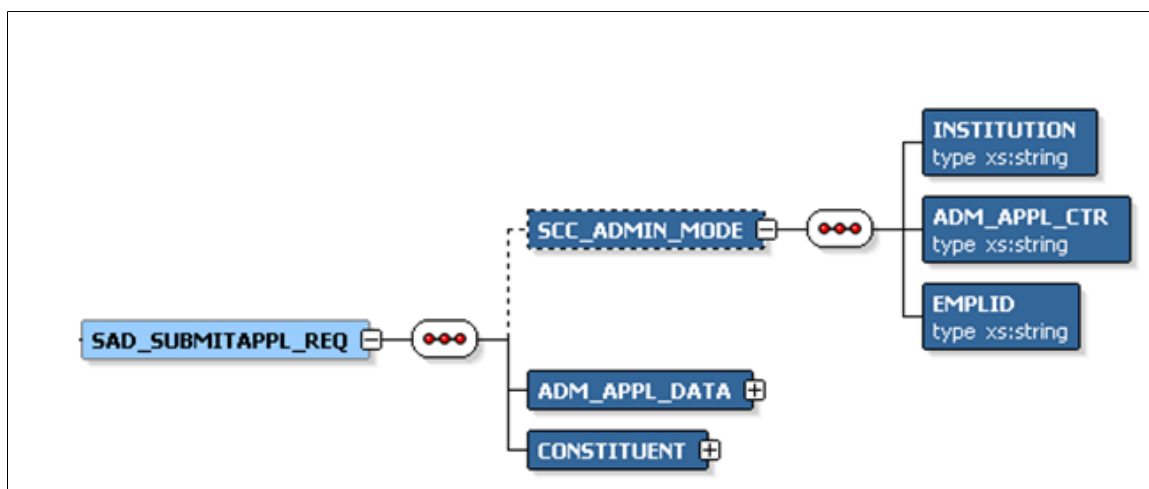
<i>Submit Application Service Operation Description and Features</i>	<i>Details</i>
Processing	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate that the user is authenticated (and is not a Guest). 2. If administrator mode then: <ol style="list-style-type: none"> a. Validate the required input administrator parameters. b. Validate that the administrator is authorized to access the application center, institution, career, program and plan. c. Use the EMPLID supplied by the administrator for the transaction. 3. Validate that the applicant is authorized to submit the application (for example, verify whether the applicant is the same person who created the application in a call to the SAD_CREATEAPPL service operation.) 4. If administrator mode, then use the input parameter Application Center value for the application. 5. If applicant mode, then use the input parameters and the settings on the Application Configuration component to assign an application center to the application. 6. To enter the Application Citizenship details use the applicant details in the input parameters, if necessary. 7. To enter the Constituent Institution (needed for data update rules) use the Admissions Application Institution input parameter value. 8. Validate the constituent and application data using the Constituent and Applicant entity schemas. 9. Associate the TEMP_ID (assigned during the SAD_CREATEAPPL processing) with the application. 10. Save the validated constituent and application data to the staging tables. 11. If the constituent is not known to the Campus Solutions system (for example, the applicant does not have an EMPLID): <ol style="list-style-type: none"> a. Run the Search Match process according to the Search Match settings on the Transaction Setup component. b. Add or update a Person record according to Search Match configuration and apply the necessary data update rules during this processing. 12. If Fee payment is required but has not yet been paid:

Submit Application Service Operation Description and Features	Details
	<ul style="list-style-type: none"> a. Call the Student Financials Fee Calculation API to calculate the fee amount. b. If Fee Waivers are allowed then allow the application to progress to submitted status. c. If Fee Waivers are Not allowed then: <ul style="list-style-type: none"> 1. Set the application data to Saved Status. 2. Add the Fee details to the response message. <p>The caller must handle this response by initiating the payment services. Note it is possible for Fee calculation to result in a zero (0) amount in which case the caller should <i>not</i> initiate the payment service.</p> <p>13. Create or update a prospect record in the production tables according to settings on the Application Configuration component.</p> <p>If the constituent is known (for example, the applicant has an EMPLID), post the application data into the admissions production tables and apply the necessary data update rules during this processing.</p>
Output	<p>After completing the processing steps, the service operation:</p> <ul style="list-style-type: none"> 1. Posts the valid application data to the Campus Solutions admissions staging tables. 2. Posts the valid constituent data to the Transaction Manager constituent staging tables. 3. Transfers the application and constituent data from the staging tables to the person and admissions production tables. 4. Optionally, creates or updates a person record for a valid application. 5. Optionally, creates a prospect record for a known applicant.

Submit Application Service Operation Description and Features	Details
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> • User is not authenticated (for example, if an anonymous Guest user tries to sign into the online application, the service operation throws an error message.) • User is not authorized to access the application (for example, the applicant is trying to access an application created by another applicant). • Application is invalid (that is, the application fails validation processing). • Required input parameters have not been supplied by the user (see the graphic titled SAD_SUBMITAPPL_REQ Message Parameters and the "AAWS and Entity Registry" section).

Input Message: SAD_SUBMITAPPL_REQ

This image shows the input parameters that the SAD_SUBMITAPPL service operation receives from an online application.



Note that the SAD_SUBMITAPPL_REQ schema includes the Application entity (ADM_APPL_DATA) and Constituent entity XSD schemas.

Required data that the online application must supply to the service operation in Non-administrator (Applicant) mode:

- ADM_APPL_DATA
- CONSTITUENT

Required data that the online application must supply to the service operation in Administrator mode:

- Institution

- Admission Application Center
- ADM_APPL_DATA
- CONSTITUENT

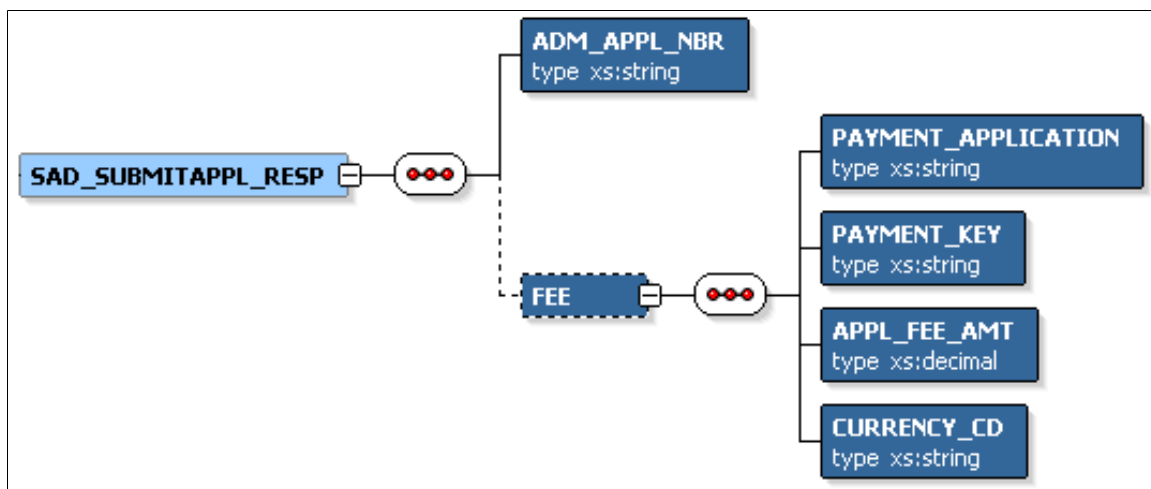
The following is an example of the SAD_SUBMITAPPL_REQ message that the SAD_SUBMITAPPL service operation receives from an online application:

```
<?xml version="1.0"?>
<SAD_SUBMITAPPL_REQ>
  <ADM_APPL_DATA>
    <!-- Application data shape -->
  </ADM_APPL_DATA>
  <CONSTITUENT>
    <!-- Constituent data shape -->
  </CONSTITUENT>
</SAD_SUBMITAPPL_REQ>
```

Output Message: SAD_SUBMITAPPL_RESP

When the Integration Broker receives the SAD_SUBMITAPPL_REQ message, it responds with the SAD_SUBMITAPPL_RESP message.

This image shows the output parameters that the SAD_SUBMITAPPL service operation passes to the online application.



The following is an example of the SAD_SUBMITAPPL_RESP message that the SAD_SUBMITAPPL service operation transmits to the online application:

```
<?xml version="1.0"?>
<SAD_SUBMITAPPL_RESP>
  <ADM_APPL_NBR>00023456</ADM_APPL_NBR>
  <FEE>
    <PAYMENT_APPLICATION>SADAAWS</PAYMENT_APPLICATION>
    <PAYMENT_KEY>00023456</PAYMENT_KEY>
    <APPL_FEE_AMT>20</APPL_FEE_AMT>
    <CURRENCY_CD>USD</CURRENCY_CD>
  </FEE>
</SAD_SUBMITAPPL_RESP>
```

Fault Message: SAD_FAULT_RESP

Refer to the SAD_FAULT_RESP message example in the SAD_CREATEAPPL section.

SAD_GETAPPLS

This service operation enables the user to retrieve a summary of all active admission applications from the Campus Solutions system for the current authenticated user. The applications summary includes applications found in both the admissions staging and production database tables.

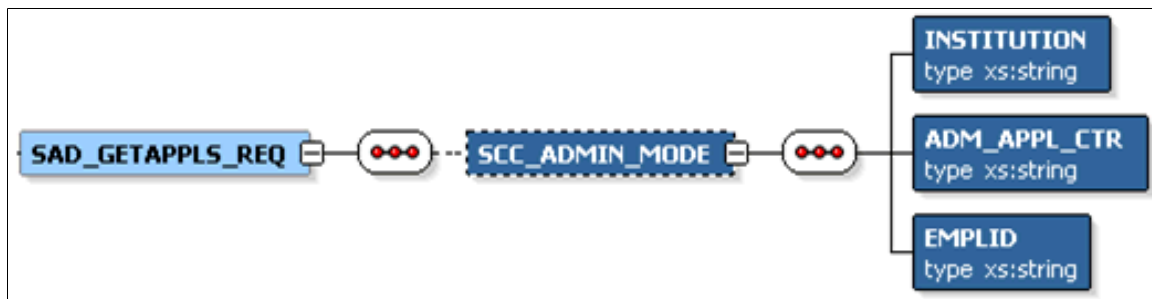
<i>Get Applications Service Operation Description and Features</i>	<i>Details</i>
Description	<p>Use this service operation to retrieve a summary of all the applications that reside in the Campus Solutions staging and production tables. The service operation retrieves only those applications that the authenticated user is authorized to access.</p> <p>SAD_GETAPPLS can operate under applicant or administrative modes. When using administrator mode, the application data returned from the Admissions production tables is subject to application center row level security. When using applicant mode, the application data returned is restricted to those applications entered previously by the authenticated online application user.</p>
Users	<ul style="list-style-type: none"> • An applicant using an online application. • An administrator using an online application to retrieve data that he or she previously saved or submitted. The administrator can retrieve an application for an applicant who has or does not have an EMPLID.

<i>Get Applications Service Operation Description and Features</i>	<i>Details</i>
Processing	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate that the user is authenticated (and is not a Guest). 2. If administrator mode then: <ol style="list-style-type: none"> a. Validate the required input administrator parameters. b. Validate that the administrator is authorized to access the application center. c. Use the EMPLID supplied by the administrator for the transaction. 3. Determine the list of configured application transactions from the Transaction Setup component. 4. Retrieve all the application transactions for all the configured application transactions. 5. Retrieve all admission applications from the Admissions staging tables that the authenticated user is authorized to access. 6. If applicant mode, then retrieve all the applications associated with the authenticated EMPLID from the production tables. 7. To retrieve the application based on the ADM_APPL_NBR key: <ol style="list-style-type: none"> a. First, check whether the application exists in the admissions staging tables using the SCC_TEMP_ID key. b. If the application does not exist in the staging tables, check the admissions production tables using the EMPLID key. 8. Return the Application Summary, which indicates ID (EMPLID or SCC_TEMP_ID), Application Number, Institution, Academic Career and Application Status (SAVED, SUBMITTED, ERROR, or POSTED).
Output	After processing the steps, a summary of all active applications is returned.

<i>Get Applications Service Operation Description and Features</i>	<i>Details</i>
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> • User is not authenticated (for example, if an anonymous Guest user tries to sign into the online application, the service operation throws an error message). • Required input parameters have not been supplied by the user (see the graphic titled <i>SAD_GETAPPLS_REQ Message Parameters</i>).

Input Message: SAD_GETAPPLS_REQ

This image shows the input parameters that the SAD_GETAPPLS service operation receives from an online application.



Required data that the online application must supply to the service operation in Non-administrator (Applicant) mode: No required parameters.

Required data that the online application must supply to the service operation in Administrator mode:

- Institution
- Admission Application Center
- Academic Program

The following is an example of the SAD_GETAPPLS_REQ message that the SAD_GETAPPLS service operation receives from an online application:

```

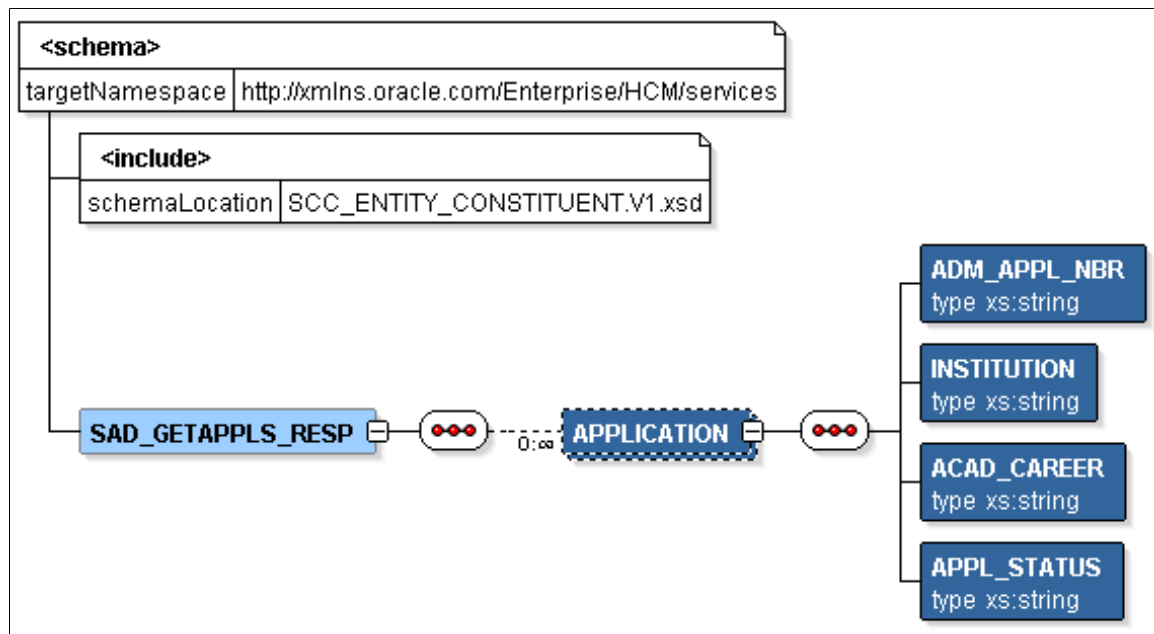
<?xml version="1.0"?>
<SAD_GETAPPLS_REQ>
</SAD_GETAPPLS_REQ>

```

Output Message: SAD_GETAPPLS_RESP

When the Integration Broker receives the SAD_GETAPPLS_REQ message, it responds with the SAD_GETAPPLS_RESP message.

This image shows the output parameters that the SAD_GETAPPLS service operation passes to the online application.



The following is an example of the SAD_GETAPPLS_RESP message that the SAD_GETAPPLS service operation transmits to the online application:

```

<?xml version="1.0"?>
<SAD_GETAPPLS_RESP>
  <APPLICATION>
    <ADM_APPL_NBR>00024656</ADM_APPL_NBR>
    <INSTITUTION>PSUNV</INSTITUTION>
    <ACAD_CAREER>UGRD</ACAD_CAREER>
    <APPL_STATUS>DRAFT</APPL_STATUS>
  </APPLICATION>
  <APPLICATION>
    <ADM_APPL_NBR>00024657</ADM_APPL_NBR>
    <INSTITUTION>PSUNV</INSTITUTION>
    <ACAD_CAREER>UGRD</ACAD_CAREER>
    <APPL_STATUS>SUBMITTED</APPL_STATUS>
  </APPLICATION>
</SAD_GETAPPLS_RESP>

```

Fault Message: SAD_FAULT_RESP

Refer to the SAD_FAULT_RESP message example in the SAD_CREATEAPPL section.

SAD_GETAPPL

This service operation enables the user to retrieve a specific admissions application from the Campus Solutions system. The application may exist in the admissions staging tables or in the admissions production tables. Saved applications reside in the staging tables and submitted applications reside in the production tables.

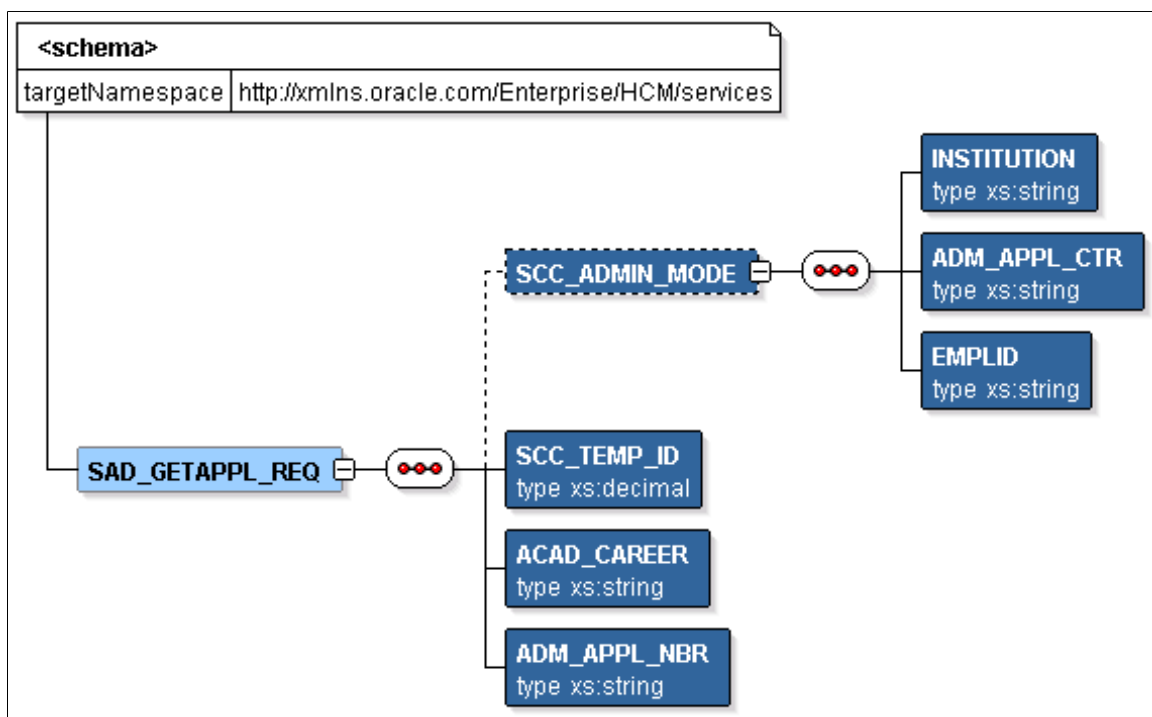
<i>Get Application Service Operation Description and Features</i>	<i>Details</i>
Description	<p>Use this service operation to retrieve a saved or submitted application using the ADM_APPL_NBR key.</p> <p>An online application can obtain the ADM_APPL_NBR application key by calling the SAD_GETAPPLS service, which retrieves a summary of all the applications associated with the current authenticated user.</p> <p>The SAD_GETAPPL operation can operate under applicant or administrative modes. When using applicant mode, the application data returned is restricted to those applications entered previously by the authenticated online application user. When using administrator mode, the application data returned from the admissions production tables is subject to application center row level security.</p>
Users	<ul style="list-style-type: none">• An applicant using an online application.• An administrator using an online application to retrieve data that they previously saved or submitted. The administrator can retrieve an application for an applicant who has or does not have an EMPLID.

<i>Get Application Service Operation Description and Features</i>	<i>Details</i>
Processing	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate that the user is authenticated (and is not a Guest). 2. If administrator mode, then: <ol style="list-style-type: none"> a. Validate the required input administrator parameters. b. Validate that the administrator is authorized to access the application center. c. Use the EMPLID supplied by the administrator for the transaction. 3. Validate that the applicant is authorized to retrieve the application (for example, verify whether the applicant is the same person who created the application). 4. If administrator mode, then use the EMPLID input parameter to retrieve the application. 5. If applicant mode, then use the EMPLID input parameter associated with the authenticated user profile to retrieve the application. 6. To retrieve the application based on the ADM_APPL_NBR key: <ol style="list-style-type: none"> a. First, check whether the application exists in the admissions staging tables using the SCC_TEMP_ID key. b. If the application does not exist in the staging tables, check the admissions production tables using the EMPLID key. 7. Return the application data, if found.
Output	<p>After completing the processing steps, the service operation returns a single application if it exists in the staging or production tables. All the application details along with constituent details are returned, if the application exists.</p>

Get Application Service Operation Description and Features	Details
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> • User is not authenticated (for example, if an anonymous Guest user tries to sign into the online application, the service operation throws an error message). • User is not authorized to access the application (for example, the applicant is trying to access an application created by another user). • Required input parameters have not been supplied by the user (see the graphic titled SAD_GETAPPL_REQ Message Parameters). • Administrative user is not authorized to access the application due to the application center security configuration.

Input Message: SAD_GETAPPL_REQ

This image shows the input parameters that the SAD_GETAPPL service operation receives from an online application.



Required data that the online application must supply to the service operation in Non-administrator (Applicant) mode:

- Academic Career
- Application Number

Required data that the online application must supply to the service operation in Administrator mode:

- Institution
- Admission Application Center

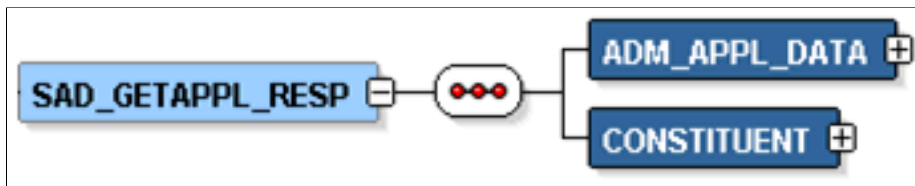
The following is an example of the SAD_GETAPPL_REQ message that the SAD_GETAPPL service operation receives from an online application:

```
<?xml version="1.0"?>
<SAD_GETAPPL_REQ>
  <ADM_APPL_NBR>00024656</ADM_APPL_NBR>
  <ACAD_CAREER>UGRD</ACAD_CAREER>
</SAD_GETAPPL_REQ>
```

Output Message: SAD_GETAPPL_RESP

When the Integration Broker receives the SAD_GETAPPL_REQ message, it responds with the SAD_GETAPPL_RESP message.

This image shows the output parameters that the SAD_GETAPPL service operation passes to the online application.



Note that the SAD_GETAPPL_RESP schema includes the Application entity (ADM_APPL_DATA) and Constituent entity XSD schemas.

The following is an example of the SAD_GETAPPL_RESP message that the SAD_GETAPPL service operation transmits to the online application:

```
<?xml version="1.0"?>
<SAD_GETAPPL_RESP>
  <ADM_APPL_DATA>
    <!-- Application data shape -->
  </ADM_APPL_DATA>
  <CONSTITUENT>
    <!-- Constituent data shape -->
  </CONSTITUENT>
</SAD_GETAPPL_RESP>
```

Fault Message: SAD_FAULT_RESP

Refer to the SAD_FAULT_RESP message example in the SAD_CREATEAPPL section.

SAD_GETATTACH

This service operation enables the user to retrieve the byte content of an admissions application attachment from the Campus Solutions system.

<i>Get Attachment Service Operation Description and Features</i>	<i>Details</i>
Description	<p>Use this service operation to retrieve an attachment associated with the admission application.</p> <p>The online application must encode the attachment byte content in Base64 format when a user saves or submits the application data through AAWS. Subsequently, the online application can use SAD_GETATTACH to retrieve the attachment. After retrieval, the online application must decode the attachment. The applicant or administrator can then use the appropriate file type viewer to view the attachment.</p> <p>The attachment is stored within the Campus Solutions attachment framework in a database table.</p> <p>You can use the Application Transactions or Maintain Applications components to access the application attachments.</p>
Users	<ul style="list-style-type: none"> • An applicant using an online application. • An administrator using an online application to retrieve data that he or she previously saved or submitted. The administrator can retrieve an application (and the associated attachments) for an applicant who has or does not have an EMPLID.

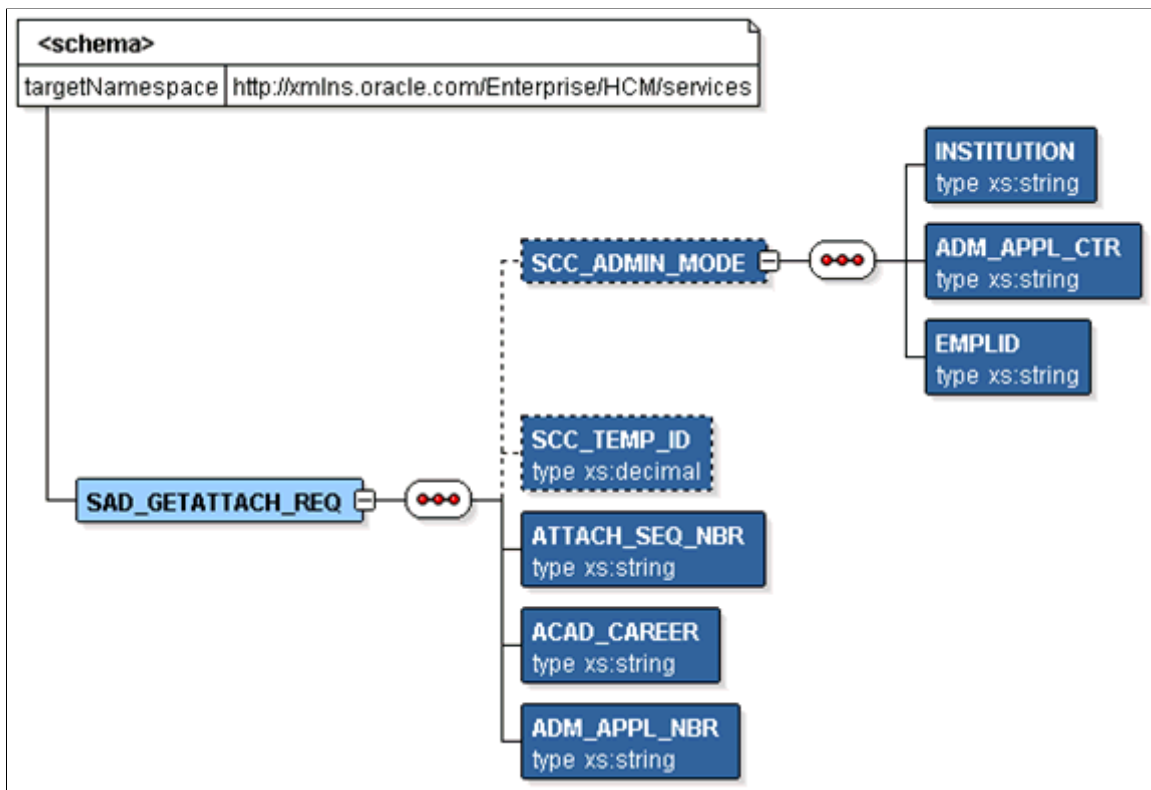
<i>Get Attachment Service Operation Description and Features</i>	<i>Details</i>
Processing	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate that the user is authenticated (and is not a Guest). 2. If administrator mode, then: <ol style="list-style-type: none"> a. Validate the required input administrator parameters. b. Validate that the administrator is authorized to access the application center. c. Use the EMPLID supplied by the administrator for the transaction. 3. Verify whether the applicant is authorized to retrieve the attachment (for example, verify whether the applicant is the same person who originally created the attachment through AAWS). 4. If administrator mode, then use the EMPLID input parameter to retrieve the attachment. 5. If applicant mode, then use the EMPLID input parameter associated with the authenticated User Profile to retrieve the attachment. 6. To retrieve the attachment: <ol style="list-style-type: none"> a. First, check whether the attachment exists in the staging tables using the SCC_TEMP_ID key. b. If the attachment does not exist in the staging tables, check the production tables using the EMPLID key. 7. Return the attachment, if found.
Output	<p>After completing the processing steps, if the attachment exists, the service operation returns the attachment data to the online application.</p>

Get Attachment Service Operation Description and Features	Details
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> • User is not authenticated (for example, if an anonymous Guest user tries to sign into the online application, the service operation throws an error message). • User is not authorized to retrieve the attachment (for example, the applicant is trying to access an attachment created by another user). • Required input parameters have not been supplied by the user (see the graphic titled <i>SAD_GETATTACH_REQ Message Parameters</i>). Administrative user is not authorized to access the attachment due to application center configuration.

Note: The Online Application may issue multiple calls to the SAD_GETATTACH service operation in order to retrieve multiple Application attachments.

Input Message: SAD_GETATTACH_REQ

This image shows the input parameters that the SAD_GETATTACH service operation receives from an online application.



Required data that the online application must supply to the service operation in Non-administrator (Applicant) mode:

- Attachment Sequence Number
- Academic Career
- Application Number

Required data that the online application must supply to the service operation in Administrator mode:

- Institution
- Admission Application Center

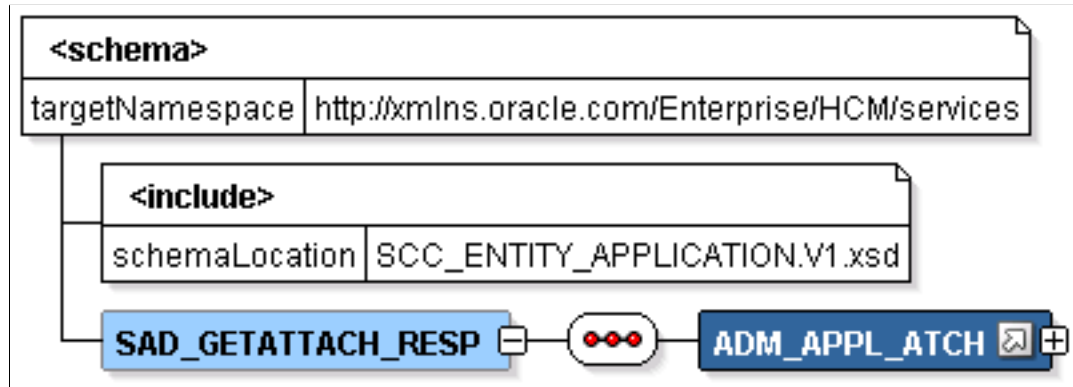
The following is an example of the SAD_GETATTACH_REQ message that the SAD_GETATTACH service operation receives from an online application:

```
<?xml version="1.0"?>
<SAD_GETATTACH_REQ>
  <ACAD_CAREER>UGRD</ACAD_CAREER>
  <ADM_APPL_NBR>00024501</ADM_APPL_NBR>
  <ATTACH_SEQ_NBR>1</ATTACH_SEQ_NBR>
</SAD_GETATTACH_REQ>
```

Output Message: SAD_GETATTACH_RESP

When the Integration Broker receives the SAD_GETATTACH_REQ message, it responds with the SAD_GETATTACH_RESP message.

This image shows the output parameter that the SAD_GETATTACH service operation passes to the online application.



The following is an example of the SAD_GETATTACH_RESP message that the SAD_GETATTACH service operation transmits to the online application:

```
<?xml version="1.0"?>
<SAD_GETATTACH_RESP>
  <ADM_APPL_ATCH class="R">
    <EMPLID>2</EMPLID>
    <ACAD_CAREER>UGRD</ACAD_CAREER>
    <STDNT_CAR_NBR>0</STDNT_CAR_NBR>
    <ADM_APPL_NBR>00024501</ADM_APPL_NBR>
    <ATTACH_SEQ_NBR>1</ATTACH_SEQ_NBR>
    <DESCR254>test file</DESCR254>
    <SCC_ROW_ADD_OPRID/>
    <SCC_ROW_ADD_DTTM/>
    <SCC_ROW_UPD_OPRID/>
    <SCC_ROW_UPD_DTTM/>
    <ATTACHSYSFILENAME>ADM_APPL_ATCH_20090331161239_Who Columns.doc</ATTACHSYSFILENAME>
```

```

AME>
  <ATTACHUSERFILE>Who Columns.doc</ATTACHUSERFILE>
  <AV_ATCH_TYPE/>
<BASE64FILE>0M8R4KGxGuEAAAAAAAAAAAAAAAAAAAAAPgADAP7/CQAGAAAAAAAA </BASE64FILE>
  </ADM_APPL_ATCH>
  <CONSTITUENT>
    <!-- Constituent data shape -->
  </CONSTITUENT>
</SAD_GETATTACH_RESP>

```

Fault Message: SAD_FAULT_RESP

Refer to the SAD_FAULT_RESP message example in the SAD_CREATEAPPL section.

Payment Integration Web Service Operations

This section discusses the SSF_INITIATE_EPAYMENT and SSF_COMPLETE_EPAYMENT service operations for the SSF_EPAYMENT_TRANSACTION service.

Note: The payment integration service operations are delivered for only supporting online applications. These service operations are not intended to be used for any other purpose.

Note: The schema diagrams in this section are subject to change as needed.

SSF_INITIATE_EPAYMENT

This service operation enables the user to record a newly initiated electronic payment in Student Financials and provides access to Campus Solutions' hosted payment framework. The hosted payment framework provides information necessary to transition the user to a designated third party payment provider's hosted site to make a payment. The insert into the GL_TXN table, for the general ledger process, will not be done until the Complete ePayment service operation (SSF_COMPLETE_EPAYMENT) is invoked successfully.

This web service operation is adapter-based. AAWS has been delivered with its own custom Payment Application adapter and will perform its own validation according to the admissions application functional requirements.

Note that the Initiate ePayment service operation operates only within the Self Service mode (and cannot be used within the Administrator mode).

Details:

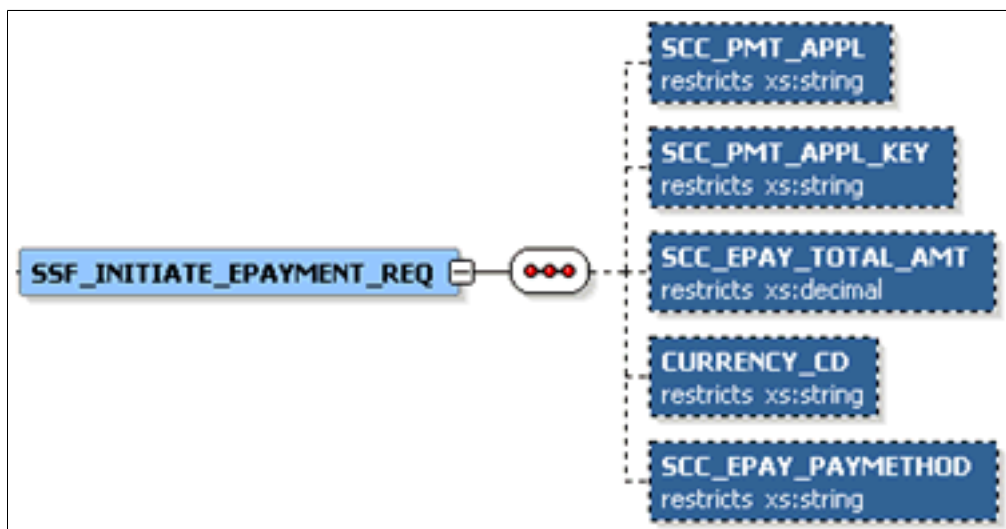
<p>Description:</p>	<p>The Initiate ePayment service operation call will create a new SF Payment in Student Financials in Initiated status, assigning a new SF Payment Reference Number (SF_PMT_REF_NBR) for tracking. This service uses the payment application's own tracking number as the merchant reference number passed to the third party payment processor. For AAWS, that tracking number is the application number (ADM_APPL_NBR). The application number will be stored in the SF Payment as ADM_APPL_NBR and SSF_EXT_TRANS_REF and the SF Payment Reference number will be stored in the Admissions Tender Staging table. In addition, the Temp ID will be stored in the SF Payment and Log. The service, through the AAWS adapter, will create new Admissions Tender Staging records (if they do not exist) for all tenders associated with the application center used in the creation of the application.</p> <p>The Initiate ePayment service will perform initial validation. For instance, the payment method must be either credit card or electronic check (CC or EC), the amount has to be greater than zero, and the Payment Application must be defined in the system table SSF_ELEC_PMTS.</p> <p>When the AAWS adapter is invoked, it will perform further validation on the transaction.</p> <ul style="list-style-type: none"> • The payment amount and currency must match the previously calculated application fee stored in the Admissions Application Staging record (SAD_APL_DAT_STG). This amount should have been previously calculated in and returned from the submit web service operation. • The transaction must have been originated by the owner of the application. • The application must be in Saved (SV) status. • If the payment is for a credit card tender type, the SF Merchant must be defined in the application center associated with the application. For electronic check transactions, the Electronic Check Merchant ID must be defined in the Application Center. These SF Merchants must be associated with Payment Merchants that are defined as <i>hosted</i>. • The tender used must be defined as a valid tender on the Application Fee code associated with the application center.
<p>Users:</p>	<p>An applicant using an online application.</p>

Processing:	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate the parameters passed in to the web service. 2. Create a SF Payment to record the transaction. The SF Payment will be in Initiated status. For AAWS, SF Payment Detail records, which will later be used to record the transaction in the General Ledger, will be based on the Application Fee Item Type setup. 3. Call the AAWS adapter to: <ul style="list-style-type: none"> • Validate the application. • Validate the payment parameters. • Create Application Tender Staging records. • Save the application. 4. Call the hosted payment framework. The hosted payment framework will: <ul style="list-style-type: none"> • Based on the hosted payment adapter associated with the Payment Merchant, perform an initial web service callout to the third party to pass demographic information about the applicant, such as name, address, email and phone. Note that this information may or may not be used, depending on the third party payment processor. In addition, a shared secret may be passed to the third party to authenticate electronic check transactions. For AAWS, this shared secret is the Constituent birth date. The third party will return a temporary token that identifies the transaction to both the third party and Campus Solutions. • Using the HTML object definition on the Payment Merchant, create a string that will be used to either http post or redirect to the third party.
Output:	<p>After completing the processing steps, the service operation:</p> <ol style="list-style-type: none"> 1. Records the transaction in the SF Payment table and Detail records. 2. Creates new Admissions Application Tender Staging records. 3. Optionally, performs a web service callout to the third party payment processor to pass demographic information and receive a token identifying the transaction.

Error Conditions:	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> • The payment method is invalid. • The payment amount is zero. • The Payment Application is invalid. • Required input parameters have not been supplied by the user. • The transaction does not pass the AAWS adapter validation.
-------------------	--

Input Message: SSF_INITIATE_EPAYMENT_REQ

This image shows the input parameters that the SSF_INITIATE_EPAYMENT service operation receives from an online application.



Required data that the online application must supply to the service operation:

- Payment Application
- Payment Application Key (Application Number)
- Payment Amount
- Currency Code
- Payment Method (Credit card or electronic check)

The following is an example of the SSF_INITIATE_EPAYMENT_REQ message that the SSF_INITIATE_EPAYMENT service operation receives from an online application:

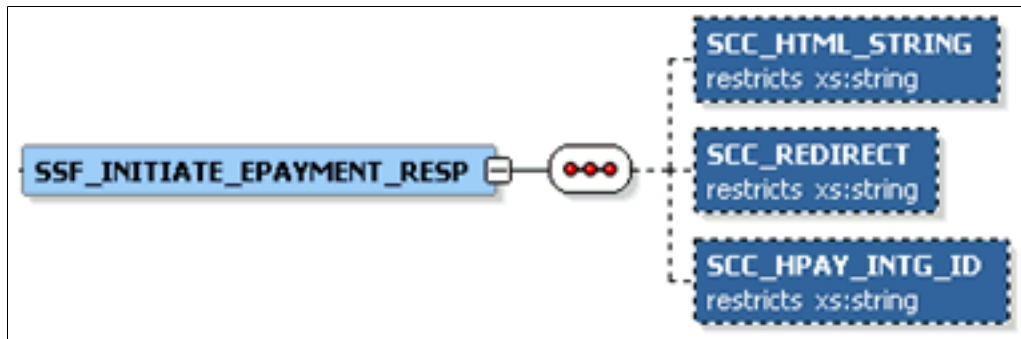
```
<?xml version="1.0"?>
<SSF_INITIATE_EPAYMENT_REQ xmlns="http://xmlns.oracle.com/Enterprise/HCM/services">
  <SCC_PMT_APPL>SADAAWS</SCC_PMT_APPL>
  <SCC_PMT_APPL_KEY>00024828</SCC_PMT_APPL_KEY>
  <SCC_EPAY_TOTAL_AMT>20</SCC_EPAY_TOTAL_AMT>
  <CURRENCY_CD>USD</CURRENCY_CD>
</SSF_INITIATE_EPAYMENT_REQ>
```

```
<SCC_EPAY_PAYMETHOD>CC</SCC_EPAY_PAYMETHOD>
</SSF_INITIATE_EPAYMENT_REQ>
```

Output Message: SSF_INITIATE_EPAYMENT_RESP

When the Integration Broker receives the SSF_INITIATE_EPAYMENT_REQ message, it responds with the SSF_INITIATE_EPAYMENT_RESP message.

This image shows the output parameters that the SSF_INITIATE_EPAYMENT service operation passes to the online application.



The following is an example of the SSF_INITIATE_EPAYMENT_RESP message that the SSF_INITIATE_EPAYMENT service operation transmits to the online application:

```
<?xml version="1.0"?>
<SSF_INITIATE_EPAYMENT_RESP xmlns="http://xmlns.oracle.com/Enterprise/HCM/services">
  <SCC_REDIRECT>N</SCC_REDIRECT>
  <SCC_HTML_STRING>
    <![CDATA*<SCRIPT LANGUAGE='JavaScript'>
writeConsole('https://someserver/C30002test_upay/web/index.jsp', '<input type="HIDD
EN" name="TICKET_NAME" value="SADAAWS"><input type="HIDDEN" name="UPAY_SITE_ID" val
ue="12"><input type="HIDDEN" name="TICKET" value="ce224625-e55c-4346-b87c-96f784f5a
e90">');
function writeConsole(bind1, bind2)
{
var stuff = '<form name="payform" action="'+bind1+
'" method="POST">'+bind2+'<SCRIPT LANGUAGE="JavaScript" onload="submitForm()">'+
'function submitForm(){document.payform.submit()}'+
'</'+<SCRIPT>'+</'+form'+>';
document.body.innerHTML = stuff;
document.payform.submit();
}
</SCRIPT>*]>
</SCC_HTML_STRING>
  <SCC_HPAY_INTG_ID>QA_CS_AAWS_MODEL1A</SCC_HPAY_INTG_ID>
</SSF_INITIATE_EPAYMENT_RESP>
```

Fault Message: SSF_TRANS_FAULT_RESP

If the service operation encounters an error condition, it responds with the SSF_TRANS_FAULT_RESP message.

The following is an example of the SSF_TRANS_FAULT_RESP message that the SSF_INITIATE_EPAYMENT service operation transmits to the online application:

```
<?xml version="1.0"?>
<SOAP-ENV:Envelope xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns=
:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Body>
    <SOAP-ENV:Fault>
      <faultcode>Client</faultcode>
      <faultstring>An Error occurred processing this request (14098,286)</faultstri=
ng>
      <detail>
        <MSG>
          <MSG>
            <ID>14871-11</ID>
            <DESCR>The Payment Amount must be greater than zero. (14871,11)</DESCR>
          </MSG>
        </MSG>
      </detail>
    </SOAP-ENV:Fault>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

SSF_COMPLETE_EPAYMENT

This web service operation completes a previously initiated (SSF_INITIATE_EPAYMENT) SF Payment, by authorizing the transaction and submitting the application. If authorization is successful, the SF Payment Transaction Manager will create the Direct GL Transaction.

After having successfully invoked the SSF_INITIATE_EPAYMENT service operation, the Online Application should transition the applicant to the third party payment provider using the SCC_HTML_STRING returned from the SSF_INITIATE_EPAYMENT response. This next web service should be invoked after the transaction is submitted by the applicant from the third party payment processor user interface.

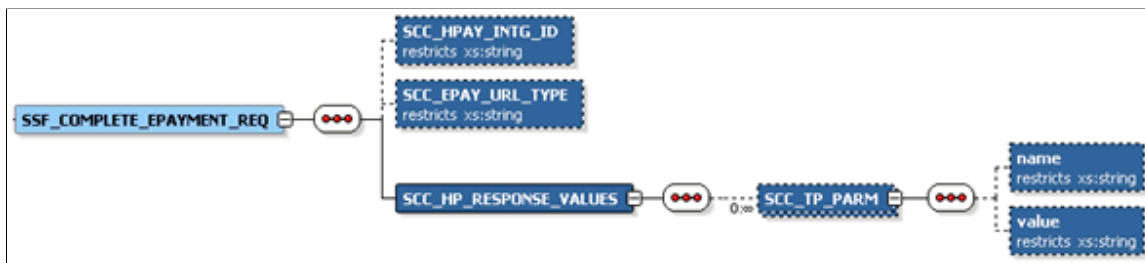
Details:

<p>Description:</p>	<p>The Complete ePayment web service operation interprets the response from the third party payment processor by invoking the hosted payment framework. The data received from the third party is transformed into Campus Solutions data elements to allow the update of both Student Financials tables and the calling Payment Application (AAWS).</p> <p>If the user submitted the transaction successfully from the third party processor, this web service operation will complete any processing required in Student Financials to record the payment. The session ID, which is a unique token generated and returned by the third party to identify the payment, as well as the last 4 digits of the credit card or account number, will be stored in the SF Payment table from within the hosted payment framework.</p> <p>The ePayment API will be invoked to authorize the transaction. If successful, the payment will be processed in Student Financials by setting the SF Payment status to Complete (SF_PAYMENT_STATUS = B), creating the SF Payment Log with the results of the authorization, and eventually deleting the SF Payment.</p> <p>The transaction will be recorded directly in the General Ledger using the Direct to GL API (as opposed to posting to a Student Financials account).</p> <p>Finally, the adapter for AAWS will be invoked to submit the application. The application fee status will be set to Received, the Application Fee Paid amount and GL Sent Amount will be set to the Payment Amount. The Admissions Application Tender Staging record's tender amount will also be set to the Payment Amount.</p> <p>If the user cancelled the transaction from the third party payment processor's hosted site, the SF Payment status will be set to Cancelled. No update will occur on the AAWS adapter and the applicant can submit another payment against the application.</p>
<p>Users:</p>	<p>An applicant using an online application.</p>

Processing:	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> 1. Validate the parameters passed in to the web service. 2. Call the Hosted Payment framework using the Hosted Payment adapter passed into the web service. The hosted payment framework will interpret the name/value pairs and transform them into Campus Solutions data elements using the hosted payment adapter settings. It will extract the Payment Application ID and Key (application number) to correctly identify the transaction. It will update the session id and last 4 digits of the account or credit card number in the SF Payment. 3. Complete the SF Payment associated with the application. For successfully submitted transactions, the transaction will be authorized and sent to the General Ledger. 4. Call the AAWS adapter to update the proper fields in the application and submit it.
Output:	<p>After completing the processing steps, the service operation:</p> <ol style="list-style-type: none"> 1. Sets the SF Payment status to Complete or Cancelled according to the user action on the third party processor. It will set the status to Declined if authorization fails. The SF Payment will be deleted and the SF Payment Log will be created to record the transaction results. 2. Creates the General Ledger Transaction records for later processing to the General Ledger. 3. Submits the application if the payment was successfully authorized.
Error Conditions:	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> • The Hosted Payment Adapter ID is invalid. • The Return URL type is invalid (Valid values are S, C or E) • The Payment Application is invalid. • Required input parameters have not been supplied by user. • The transaction does not pass the AAWS adapter validation.

Input Message: SSF_COMPLETE_EPAYMENT_REQ

This image shows the input parameters that the SSF_COMPLETE_EPAYMENT service operation receives from an online application.



Required data that the online application must supply to the service operation:

- Hosted Payment Adapter ID.
- Return URL Type (Success, Cancelled, Error).
- Hosted Payment Response Values (Name/Value pairs returned from third party). These values are expected to correspond to the values under the Third Party Parameter Name of Inbound Parameters grid of Hosted Payment Adapter Setting. For example:

This example illustrates a Hosted Payment Adapter setting.

Hosted Payment Adapter

Parameters

Hosted Payment Adapter:

QA_CS_AAWS_MODEL1A

Description:

AAWS Adapter

Outbound Parameters

Personalize | Find | | First 1-3 of 3 Last

ePayment Property	Third Party Parameter Name		
transactionSource	TICKET_NAME	+	-
merchantID	UPAY_SITE_ID	+	-
requestToken	TICKET	+	-

Inbound Parameters

Personalize | Find | | First 1-5 of 5 Last

Third Party Parameter Name	ePayment Property		
session_identifier	sessionID	+	-
UPAY_SITE_ID	merchantID	+	-
EXT_TRANS_ID	merchantRef	+	-
acct_number	ccNum	+	-
acct_number	bankAcctNum	+	-

Save

Return to Search

Notify

Hosted Payment Adapter | Parameters

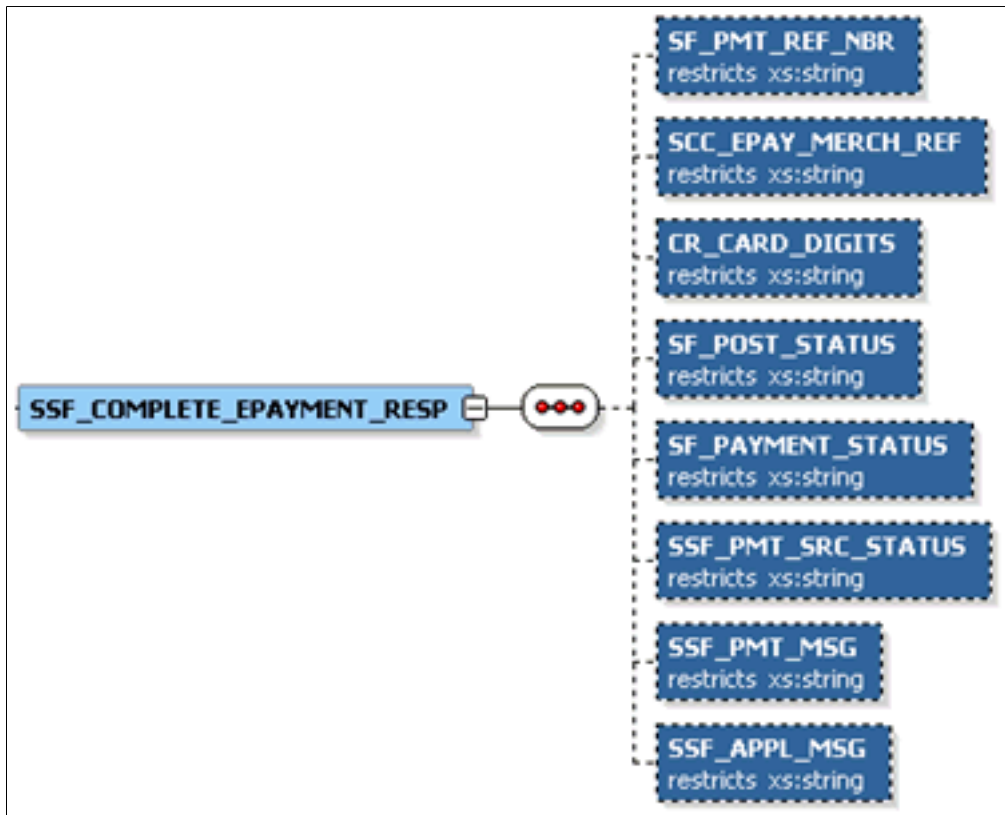
The following is an example of the SSF_COMPLETE_EPAYMENT_REQ message that the SSF_COMPLETE_EPAYMENT service operation receives from an online application:

```
<?xml version="1.0"?>
<SSF_COMPLETE_EPAYMENT_REQ xmlns="http://xmlns.oracle.com/Enterprise/HCM/services">
  <SCC_HPAY_INTG_ID>QA_CS_AAWS_MODEL1A</SCC_HPAY_INTG_ID>
  <SCC_EPAY_URL_TYPE>S</SCC_EPAY_URL_TYPE>
  <SCC_HP_RESPONSE_VALUES>
    <SCC_TP_PARM>
      <name>session_identifier</name>
      <value>5c012fb4-43a4-4ffd-be63-a1415ce2b7e4</value>
    </SCC_TP_PARM>
    <SCC_TP_PARM>
      <name>UPAY_SITE_ID</name>
      <value>12</value>
    </SCC_TP_PARM>
    <SCC_TP_PARM>
      <name>EXT_TRANS_ID</name>
      <value>SADAAWS_00024863</value>
    </SCC_TP_PARM>
    <SCC_TP_PARM>
      <name>acct_number</name>
      <value>XXXXXXXXXX2222</value>
    </SCC_TP_PARM>
    <SCC_TP_PARM>
      <name>acct_number</name>
      <value>XXXXXXXXXX2222</value>
    </SCC_TP_PARM>
  </SCC_HP_RESPONSE_VALUES>
</SSF_COMPLETE_EPAYMENT_REQ>
```

Output Message: SSF_COMPLETE_EPAYMENT_RESP

When the Integration Broker receives the SSF_COMPLETE_EPAYMENT_REQ message, it responds with the SSF_COMPLETE_EPAYMENT_RESP message.

This image shows the output parameters that the SSF_COMPLETE_EPAYMENT service operation passes to the online application.



The following is an example of the SSF_COMPLETE_EPAYMENT_RESP message that the SSF_COMPLETE_EPAYMENT service operation transmits to the online application:

```
<?xml version="1.0"?>
<SSF_COMPLETE_EPAYMENT_RESP xmlns="http://xmlns.oracle.com/Enterprise/HCM/services">
  <SF_PMT_REF_NBR>000000000043</SF_PMT_REF_NBR>
  <SCC_EPAY_MERCH_REF>00024828</SCC_EPAY_MERCH_REF>
  <CR_CARD_DIGITS>1111</CR_CARD_DIGITS>
  <SF_POST_STATUS>S</SF_POST_STATUS>
  <SF_PAYMENT_STATUS>B</SF_PAYMENT_STATUS>
  <SSF_PMT_SOURCE_STATUS>S</SSF_PMT_SOURCE_STATUS>
  <SSF_PMT_MSG>Your payment was successfully processed.</SSF_PMT_MSG>
  <SSF_APPL_MSG>Your application 00024828 was successfully submitted.</SSF_APPL_MSG>
</SSF_COMPLETE_EPAYMENT_RESP>
```

Fault Message: SSF_TRANS_FAULT_RESP

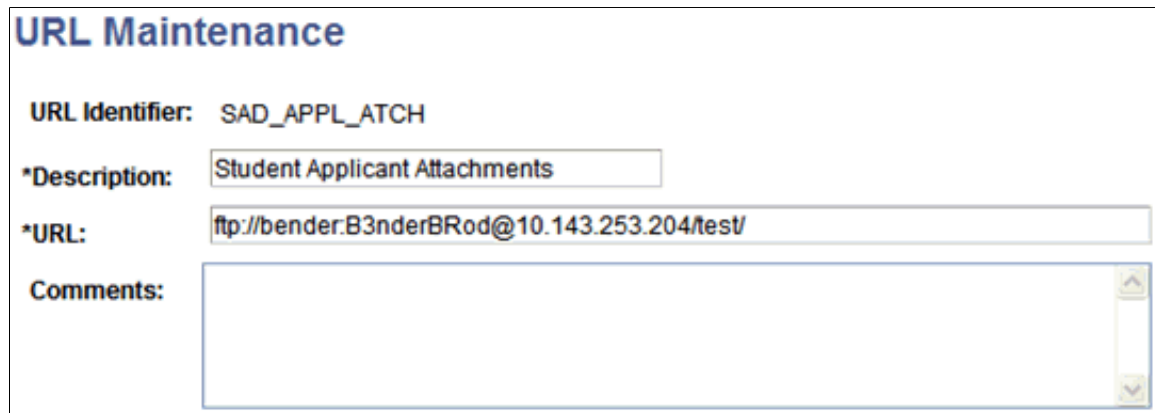
Refer to the SSF_TRANS_FAULT_RESP message example in the SSF_INITIATE_EPAYMENT section.

Setting Up the Attachments URL

Use the URL Maintenance page to define the location that AAWS uses to store application attachments. To navigate to the URL Maintenance page, select **PeopleTools >Utilities >Administration >URLs**.

In this example, attachments are stored in a FTP Server:

This example illustrates a URL Maintenance page.



The screenshot shows a web form titled "URL Maintenance". It contains the following fields:

- URL Identifier:** SAD_APPL_ATCH
- *Description:** Student Applicant Attachments
- *URL:** ftp://bender.B3nderBRod@10.143.253.204/test/
- Comments:** A large text area with a vertical scrollbar on the right side.

Setting Up Hosted Payment

Application Fees are optionally required during application submission as configured in the Application Center Setup page. If fees are required to be paid then a prerequisite is to set up the hosted payment adapter and merchant which will facilitate the online payment.

Firstly, create a new HTML object in Application Designer. The HTML object is used to store user interface specific HTML and JavaScript which will direct the self-service user interface during the payment integration flow. Refer to the User Interface Considerations section for detailed technical information on what this HTML object may need to contain.

See [User Interface Considerations](#)

Next, set up a new hosted payment adapter for AAWS pointing to the same application class as the one used for PIA Self Service. This step is required because the HTML definition (created in the first step) is attached to the adapter itself.

Access the Adapter Table page (**Set Up SACR >System Administration >Utilities >Adapter Registry**).

This example illustrates the fields and controls on the Hosted Payment Adapter Setup page.

Adapter Table

Adapter ID: QA_CS_MODEL1A_AAWS
Adapter Type: Hosted Payment Adapters
Description: Adapter for AAWS
Long Description:

Parameters

Root Package ID: SCC_HOSTED_PAYMENT
Path: Adapters
Application Class ID: HostedM1a

Next, attach the new HTML definition to the Hosted Payment Adapter settings. Access the Hosted Payment Adapter page (**Set Up SACR >Common Definitions >Electronic Payments >Hosted Payment Adapter Setting**).

This example illustrates the fields and controls on the Hosted Payment Adapter page.

Hosted Payment Adapter: QA_CS_MODEL1A_AAWS
HTML Definition: QA_CS_HPAY_AAWS
Third Party URL: QA_CS_TP_URL
Record Name:
Field Name:

Customize | Find | View All | First 1 of 1 Last
 Return URL Type Weblib Function Main Content
 [Dropdown] [Dropdown] [+] [-]

The parameters page should be set up according to your third-party payment provider's requirements.

This example illustrates the fields and controls on the Parameters page.

Hosted Payment Adapter
Parameters

Hosted Payment Adapter: QA_CS_MODEL1A_AAWS
Description: Token-based Integration

Outbound Parameters
Customize | Find | | First 1-3 of 3 Last

ePayment Property	Third Party Parameter Name		
transactionSource	TICKET_NAME	+	-
merchantID	UPAY_SITE_ID	+	-
requestToken	TICKET	+	-

Inbound Parameters
Customize | Find | | First 1-5 of 5 Last

Third Party Parameter Name	ePayment Property		
session_identifier	sessionID	+	-
UPAY_SITE_ID	merchantID	+	-
EXT_TRANS_ID	merchantRef	+	-
acct_number	ccNum	+	-
acct_number	bankAcctNum	+	-

Next, the hosted payment adapter is attached to a Payment Merchant. If you are already using the hosted payment framework for Student Financials' Self Service or Cashiering, you will still need to set up new Payment Merchants with a different set of Third Party Merchant IDs. Your third party will require return URLs in order to navigate the user back to the online application. These return URLs are typically tied to the Third Party Merchant ID defined in the Payment Merchant.

Note that the hosted payment adapters use the Get Token (91) and Authorize Only (92) transactions defined in the Electronic Payment Setup section of the Payment Merchant setup. If you plan to use these adapters as delivered, you will need to set up this section in the same manner as defined in the Electronic Payment Integration Developer's Reference Guide in My Oracle Support (ID 1982664.1). In addition, you will need to set up the corresponding Integration Broker Related objects for these transactions. Please refer to the Electronic Payment Integration Developer's Reference Guide in My Oracle Support (ID 1982664.1) for more details.

You are required to configure one for each payment method you accept (credit card or electronic check).

Access the Payment Merchant page (**Set Up SACR >Common Definitions >Electronic Payments >Payment Merchant**).

This example illustrates the fields and controls on the Payment Merchant page.

Payment Merchant

Merchant Setup ID: HPayAAWSSiteCC
***Description:** Hosted site for AAWS CC Trans
***Status:** Active
***Service Provider:** Unsupported
***Third Party Merchant ID:** 16 ☒ Hosted Payment Provider

Hosted Payment Setup

Adapter: QA_CS_MODEL1A_AAWS

Browser Requirements Message:
 To proceed with your payment, you need to enable cookies and javascript in your browser. If you are unsure how to enable these, please click on the Browser Requirements link below.

Browser Requirements Detail:
 How to Enable Cookies:
 Microsoft Internet Explorer 6 or later Choose Tools -- Internet Options. Click the Privacy tab

Electronic Payment Setup

Service Operation: QA_CS_HOSTEDPAY **Insert All Transactions**

Adapter: SCC_INT_BROKER ☐ Security Key Required

Supported Transactions

Value	Description		
91	Get Token (HPay)		
92	Authorize Only (HPay)		
93	Credit Only (HPay)		

Finally, payment merchants are attached to SF merchants which are associated with the Admissions Application Center.

Credit transactions (Credit Only – 93 as defined above) can only be generated for transactions posted to the student account. Since payments received through the online admissions application are posted to the General Ledger directly, credit transactions are not supported for these application fee payments.

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

This example illustrates the fields and controls on the SF Merchants page.

SF Merchants

SF Merchant ID: APP CENTER

*Description: Application Fee Center

*Process Option: Credit Card

*Payment Merchant: Hosted Pay Site CC AAWS

☒ Hosted Payment Provider

Batch Transmission Error: 3

Credit Card

☒ Real-Time Authorization ☒ Real-Time Capture ☐ Real-Time Credit

Self Service Options

Convenience Fee Option: [Dropdown]

Convenience Fee Amount: [Text Box]

Convenience Fee Percentage: [Text Box]

Minimum Payment Amount: [Text Box]

Note: Convenience fees are not currently supported for online application fee payment.

Post Installation Troubleshooting Tips

This section discusses how to:

- Verify web service security settings.
- Publish the web services.
- Refresh the HCM Registry Cache.
- Verify Campus Solutions SOA framework setup entries.
- Avoid caching issues.
- Resolve Microsoft Internet Explorer 7 trusted sites issue.
- Resolve Adobe Flex domain security issue.

Verifying Web Service Security Settings

The service operations for the SAD_ADMISSIONS, SCC_USERREG, SCC_LOV, SSF_EPAYMENT_TRANSACTION, and SCC_SM_SERVICE services are delivered with FULL ACCESS to the HCSPSERVICE permission list.

Note: SCC_SM_SERVICE supports all aspects of the External Search Match feature and was delivered as part of Constituent Web Services (CWS).

To verify whether HCSPSERVICE permission list is assigned to a service operation with FULL ACCESS:

1. Access the General page (**PeopleTools >Integration Broker >Integration Setup >Service Operations >General**).
2. Click the **Service Operation Security** link to access the Web Service Access page.
3. On the Web Service Access page, verify whether the permission list has full access.

Publishing the Web Services

Use the Provide Web Service page to publish the following web services (PeopleTools, Integration Broker, Web services, Provide Web Service):

- SAD_ADMISSIONS
- SSF_EPAYMENT_TRANSACTION

Refreshing the HCM Registry Cache

A new version (1.1) of the Campus Solutions AddPersonCS service has been delivered. This may require the HCM service registry to be refreshed.

To refresh the HCM service registry:

1. Access the HCM Interface Registry page (**Set Up Common Objects >System Administration >HCM Registry >Service Registry**).

This example illustrates the fields and controls on the HCM Interface Registry page.

HCM Interface Registry

Search

*Owner Identifier HCM Service Framework

Refresh Cache Generate Registry Doc

Click on the interface name to see details.

Left | Right

+	HCM Registry
---	--------------

2. Click the **Refresh Cache** button.

Verifying Campus Solutions SOA Framework Setup Entries

During installation, the system automatically inserts configuration data into the Campus Solutions SOA Framework setup tables.

To verify whether the setup entries exist:

1. Access the Request Handlers component (**Set Up SACR >System Administration >Integrations >Request Handlers**).
2. For all the SAD_ADMISSIONS web service operations, ensure that the fields on the Request Handlers page contain the following values:

<i>Field</i>	<i>Value</i>
Package Name	SCC_OLA
Path	Handlers
Application Class ID	Admissions

3. For all the SSF_EPAYMENT_TRANSACTION web service operations, ensure that the fields on the Request Handlers page contain the following values:

<i>Field</i>	<i>Value</i>
Package Name	SSF_EPAYMENT_TRANS
Path	HANDLERS
Application Class ID	Admissions

Avoiding Caching Issues

Your web server or browser may cache old content. One way to overcome this issue is to enclose the online application page content in a HTML wrapper as shown in the following code:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 3.2//EN">
<html>
<head>
<!-- BEGIN INSERT --><META HTTP-EQUIV="Expires" CONTENT="Mon, 04 Dec 1999 21:29:02 =>
GMT"><!-- END INSERT -->
<!-- BEGIN INSERT --><HEAD><META HTTP-EQUIV="PRAGMA" CONTENT="NO-CACHE"></HEAD><!-->
  END INSERT -->
<title>OLA Demo</title>
</head>
```

```
<body bgcolor=white lang=EN-US link="#3366cc" vlink="#9999cc" style='tab-interval:
.5in' leftmargin=10 RIGHTMARGIN=10 alink="#0000cc">
<object width="800" height="500">
<param name="movie" value="OLA.swf">
<embed src="OLA.swf" width="800" height="500">
</embed>
</object>
</body>
</html>
```

Resolving Microsoft Internet Explorer 7 Trusted Sites Issue

When using Microsoft Internet Explorer 7, you may need to add your web server URL hostname to Microsoft Internet Explorer 7's trusted sites. If you do not add the URL to the trusted sites, you will receive a security error that starts like: Error in line 1 char 2. This is a rather cryptic error, but adding your web server host to the trusted sites setup in your browser will correct this issue.

Resolving Adobe Flex Domain Security Issue

This issue is applicable if you are using Adobe Flex to develop an online application.

If the user loads this online application from a particular domain, the online application cannot retrieve data from another domain. To avoid this issue, you can create a crossdomain.xml file that allows your online application to load content from other domains. Refer to the Adobe Flash or Adobe Flex website for more information on the crossdomain.xml file.

Setting Up Logging

This is an optional setup.

Use the Logging page to enable and configure the logging feature (**Set Up SACR >System Administration >Integrations >Logging**).

This example illustrates the fields and controls on the Logging page.

Note: You should not enable logging in a production environment. SOA framework logging is only appropriate for a testing, demo or development environment or when performing critical troubleshooting activities.

User Interface Considerations

It is beyond the scope of this AAWS documentation to cover the best practices for user interface design and an effective online application user experience. However, this section discusses some key considerations for designing and creating a user interface that interacts with AAWS.

Note that in addition to user interfaces interacting with AAWS, a third party admission application can also interact with AAWS by transmitting the completed application data to AAWS for further processing.

Start: Unregistered User

Essentially all applicant users start in this state.

New User Registration

The user interface could use the SCC_USERREG_CREATEACCT service operation. NUR is a delivered CTM transaction.

Logon (Authentication)

The user interface could use the delivered SCC_USERREG_AUTHENTICATE service operation.

Get Application Summary

Once the user has been authenticated, it is likely that the user would then expect to see some form of online application launch page. It is also likely that returning users would expect to view or update any applications they have saved or submitted previously. To implement this kind of scenario, the online application user interface can request from AAWS the application summary information for the logged in user and then display this information on the launch page.

For first time users, the online application does not display saved or submitted application information. For these users, the online application can display options for creating a new application or for logging out.

A typical self-service, online-application user interface might perform the following actions:

- Formulate a request message.
- Submit the request message to the SAD_GETAPPLS service operation.
- Receive the application summary response message from AAWS.
- Based on the application status, present each application to the user in a grid style format for subsequent actions.
- Typically, applications which are in a Submitted status are not eligible for update and a user interface would need to enforce this rule depending on the institution's requirements.

Create Application

From the online application launch page, a user may choose to start the application process by creating a new application.

A typical self-service, online-application user interface might perform the following actions:

- Present an Apply hyperlink that the user can click to initiate the application process.
- Present an initial Academic Learning Area page where the user can choose a field of study. For example, on this page the user supplies the required values to the SAD_CREATEAPPL service operation. The required values that the user enters might include academic program, plan, and sub plan.
- Formulate a request message.
- Submit the request message to the SAD_CREATEAPPL service operation.
- Receive one or more admission application templates with default values from AAWS.
- Present the one or more applications with the default values to the user through one or more user interface pages.
- Allow the user to enter in all required application details.

GetFee Configuration

Collecting application fees, while optional, is likely a common scenario that needs to be supported by the user interface. At some point after application creation (where the application center assigned to the application will be known to the user interface) but prior to application submission (when fees may be payable) the user interface needs to obtain the application fee configuration options. The fee options dictate what fee payment preferences should be presented to the self service applicant by the user interface. Options related to fee payment include whether:

- An application fee is required.
- The applicant is given the option to Pay Later.
- The applicant can be given the option to request a Waiver for the fee.

Based on which fee options are configured, the user interface needs to react appropriately and present the applicant with only the valid options. This will in some cases alter the user interface page flow presented to the applicant.

A typical self-service, online-application user interface might perform the following actions:

- Collect the Academic Learning Area preferences that the applicant enters during the Create Application step. For example, the applicants are required to enter the academic career and program for which they wish to create an application.
- Use the preferences to create a request message for the SCC_LOV service, the request must include a look up of:
 - The SAD_LISTVAL_VW record to retrieve the application fee options.

- The SSF_ADM_TND_VW record to retrieve the tendering options.
- Submit the request message to the SCC_LOV service.
- Receive the application fee configuration options.
- Act on the application fee configuration options in the following way:
 - If the Pay Later option is activated, then present the applicant with the choice to pay later (the applicant's choice is then used in the subsequent Submit Application step).
 - Store all the application fee and tendering configuration options in user interface storage for use in the subsequent Present Fee Options step.

Update Application

The online application's launch page may show applications that the user has previously saved or submitted. The user may wish to submit a previously saved application.

A typical self-service, online-application user interface might perform the following actions:

- Present an Update hyperlink that the user can click to initiate the application update process.
- Formulate a request message.
- Submit the request message to the SAD_GETAPPL service operation.
- Receive an in-process or draft application from AAWS.
- Present the application to the user through one or more user interface pages.
- Allow the user to modify or enter the application details.

Edit Application

This activity represents the user completing details on one or more pages in the online application. This activity mostly involves the user interface presenting the page flow and collecting data from the user. If your institution has implemented attachments, then the returning user may wish to view any existing attachments associated with an application.

When the user edits the application data, the online application user interface may present dynamically generated prompts and dropdown list boxes. The online application may need to populate the values for these prompts and list boxes through calls to the SCC_GET_LOV service operation. Dynamic prompting occurs in situations where the system uses the user input to display the user interface dynamically. An example of dynamic prompting is when the user selects an undergraduate career; the Program field on the online application displays only undergraduate programs for the user to select.

A typical self-service, online-application user interface might perform the following actions:

- Present a series of pages for the user to interact with.
- Optionally, formulate a dynamic List-Of-Values request message.

- Submit the request message to the SCC_GET_LOV service operation.
- Present the List-Of-Value results in the online application page fields.
- Optionally, formulate an attachment request message.
- Submit the request message to the SAD_GET_ATTACH service operation.
- Decode the response from AAWS and present the binary content of the attachment in a suitable viewer.

Save Application

When the user is creating or updating an application, he or she may want to pause and save the application for later modification or submission. The saved application is an in-process or draft application and AAWS places this draft application in a staging area. Subsequently, the user may submit this application or the system administrator may delete this application.

A typical self-service, online-application user interface might perform the following actions:

- Present a Save For Later hyperlink on any page in the page sequence. Generally, any page after the user starts creating the application may display this link. The user clicks this link to save the application.
- Prompt the user that the application is saved and the academic institution might use the applicant information for marketing purposes (if prospect creation is configured to occur on save).
- Formulate a request message.
- Submit the request message to the SAD_SAVEAPPL service operation.
- Receive and process the response from AAWS:

- On a Success response there are various options:

Present the user with a confirmation page. The confirmation page confirms that the application has been saved.

Take the user back to the Get Application Summary page.

Log out the user from the online application.

- On an Error response:

Based on the error codes that AAWS returns, position the user at an appropriate page of the user interface to allow data correction.

Present validation error messages to the user.

Present system error messages to the user.

Submit Application

After a user completes the application, the user interface should present a Submit Application option. Also, at submission time, the interface can present any number of disclaimer pages to the user. Generally, after a user submits the application, the user cannot update the application and the user interface would need to enforce this rule using the application status value. The user interface can retrieve this value using the SAD_GETAPPLS service operation.

A typical self-service, online-application user interface might perform the following actions:

- Present a Submit button on the final online application page.
- Prompt the user with any required disclaimers.
- Formulate a request message. Note that if a fee is due and the applicant has opted to Pay Later during the Get Fee Configuration step, then this intent must be indicated in the request message.
- Submit the request message to the SAD_SUBMITAPPL service operation.
- Receive and process a response from AAWS. There are three alternative responses that the user interface needs to cater for:

- A Success response and fee payment is not required:

Present the user with a confirmation page. The confirmation page confirms that the application has been submitted.

Take the user back to the Get Application Summary page.

Log out the user from the online application.

- A Success response and fee payment is required:

Extract the fee amount and currency code from the response.

Proceed to the Present Fee Options page.

- An Error response:

Based on the error codes that AAWS returns, position the user at an appropriate page of the user interface to allow data correction.

Present validation error messages to the user.

Present system error messages to the user.

Present Fee Options

If the Get Fee Configuration step determines that there is a fee payable at submission time, then this page flow must be presented to the applicant. Fees are calculated by Student Financials according to the Fee Code attached to the application center. This page flow needs to present the applicant with his or her payment options based on the values returned in the earlier Get Fee Configuration step. The options here will include the ability to specify the tender category (for example, CC and check) and optionally the

ability to request a waiver if that is allowed. Partial payments are not allowed. Therefore, the self service online application must not allow the applicant to change amount presented for payment.

A typical self-service, online-application user interface might perform the following actions:

- Present a page showing the:
 1. Amount payable.
 2. Currency code of the fee amount.
 3. Optionally, the ability to request a waiver.
 4. Optionally, the ability to specify a Waiver Basis code to be associated with the waiver request.
 5. Optionally, the ability for the applicant to attach one or more attachments to be used as supporting documentation for the waiver request.
- Formulate a request message based on the choice of the applicant:
 1. If the applicant requests a waiver then:
 - Add waiver details to the request.
 - Submit the request to the SAD_SUBMITAPPL service operation.
 - Process the response as in the Submit Application flow.
 2. If the applicant chooses to proceed with payment:
 - Submit the request message to the SSF_INITIATE_EPAYMENT web service operation.
 - Receive and process the response from the payment service operation.
 - The response may be either a HTTP redirect or a HTML string (this is determined by the hosted payment configuration).
 - In the case of a redirect, the user interface needs to respect the HTTP redirect and it will also need to store state of the current logged on userid/password in persistent client storage (for example, a database table).
 - In the case of a HTML string response, the user interface can handle this in a number of ways. Some examples are:
 - Spawn a new child window to display the HTML string response.
 - Incorporate the HTML response into a parent window frame.
 3. The response style is configurable and customizable by use of dynamic HTML. There is sufficient flexibility for the user interface to initiate the Payment Processing flow in either a new or an existing browser window. The decision will hinge entirely on the desired user experience and the technical capabilities of the user interface technology being employed.

- The end result of this activity is that the user will be presented with a browser page provided by the third party hosted payment processor from where the applicant can proceed with payment as given in the Payment Processing flow.

Payment Processing

At this point the applicant has indicated that they wish to proceed with payment of a fee and they will have been presented with a browser window which contains a HTML page provided by the third party hosted payment provider (for example, the applicant will have been redirected to the third party site).

The applicant would then proceed to enter payment options and submit or cancel the payment. The third party provider would then redirect the applicant's browser to one of the three configured URLs:

- CANCEL – the URL destination for when the applicant cancels the payment.
- SUCCESS – the URL destination for when the payment is completed successfully.
- FAIL - the URL destination for when the payment is not completed successfully.

In the event of a successful payment, then one final step needs to occur in order to complete the payment cycle. The Complete ePayment web service needs to be invoked to finalize the payment and submit the application. The self service online application user interface should display the appropriate message to the applicant based on the Complete ePayment (SSF_COMPLETE_EPAYMENT) response message.

A typical self-service, online-application user interface might perform the following actions:

- Formulate a request message.
- Submit the request to the SSF_COMPLETE_EPAYMENT web service.
- Present a page to notify the applicant of successful payment.
- Optionally transfer the applicant back to the Online Application home page and initiate the Get Application Summary flow to show the latest status.

Error Handling

When the system validates the data during save and submit, if validation errors occur, the error handling feature returns a list of textual descriptions of those errors along with error IDs and the field names related to the errors. As much information as possible is returned to the user interface to present the errors to the user and allow correction of the errors.

The user interface must perform the following steps to use the error handling feature:

- The user interface must populate a unique ID into the tag called SCC_ENTITY_INST_ID in the request xml for each entity. In the event of error during data validation, error handling returns to the user interface the unique ID (that is obtained from the request message) and the field name related to the error along with the error message text.
- The user interface can use this unique error ID, the field name, and the error message to know what fields on what pages are in error. This allows the user interface to highlight the fields with errors and allows the user to correct the data.

The unique ID is optional in the request schema. Therefore, institutions should populate the unique ID only if they want to uptake the error handling feature.

Institutions are free to populate the SCC_ENTITY_INST_ID in any format they please, but it is recommended that they use the official Universally Unique Identifier (UUID) format, 36 character ISO standard.

Logoff

An option to leave the online application could potentially be provided from any page in the online application. Clicking the Logout hyperlink is a signal from the users that they intend to leave the system and that any sensitive information managed by the user interface should now be cleared.

A typical self-service, online application user interface might perform the following actions:

- Present a Logout hyperlink that the user can click to log out of the online application.
- Clear the username and password combination from the local user interface temporary storage area.
- Present the user with a logged off confirmation page.

Building the Hosted Payment HTML Object

For more information about the hosted payment feature, refer to the Electronic Payment Integration Developers Reference Guide in My Oracle Support (ID 1982664.1).

The HTML object is provided as a flexible means to allow a diverse range of user interface technologies to interact with the hosted payment feature. The concept is that the HTML object can be constructed using dynamic HTML. The HTML object can then be presented in a browser window to allow seamless flow between the admissions online application and the third party payment provider. In theory there should be no page flow or user experience which cannot be achieved using a JavaScript based HTML object. Note that the HTML object is not limited to JavaScript and can contain any proprietary client side scripting language as is dictated by the user interface technology in use by the institution.

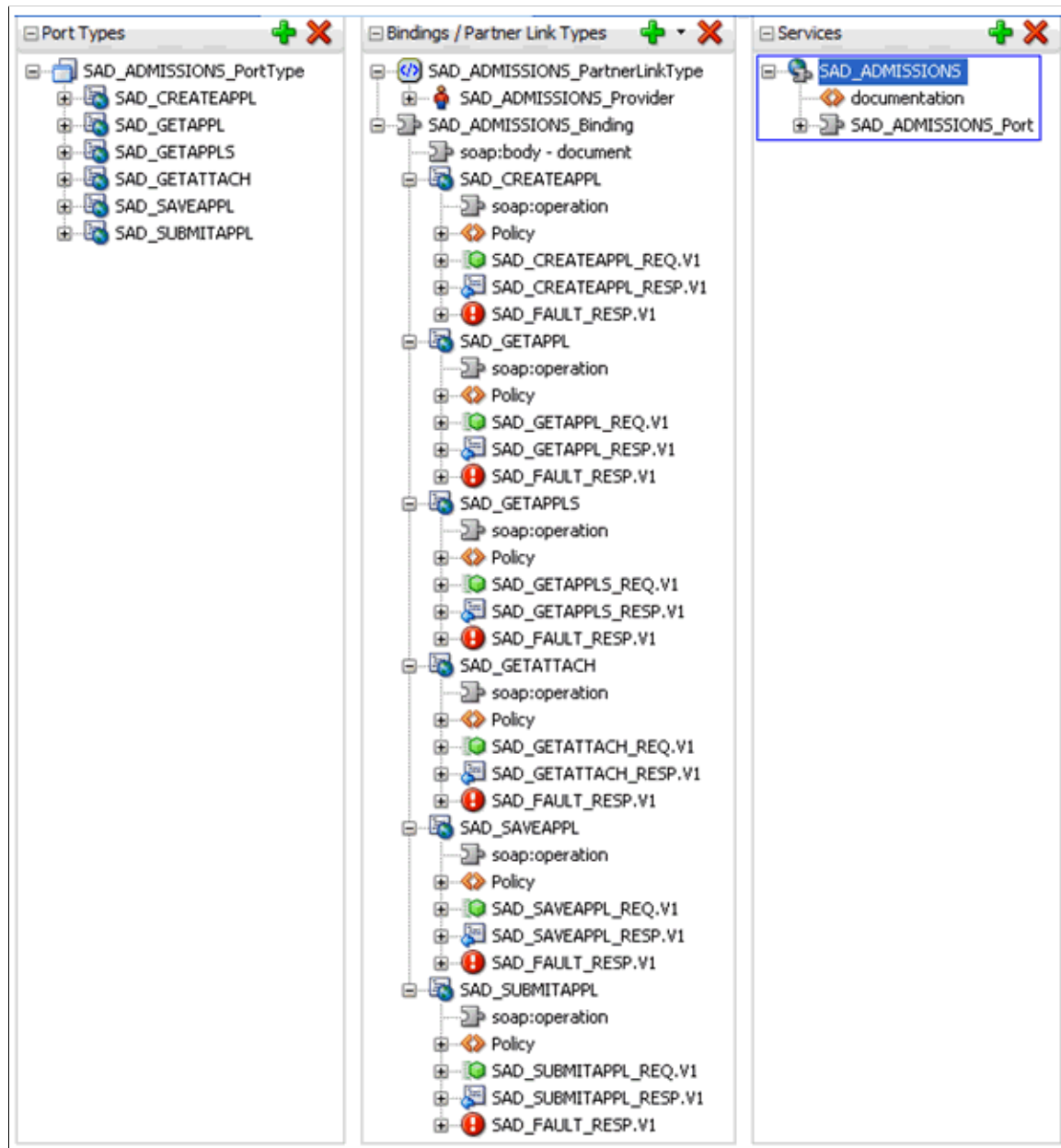
As a simple example the following HTML object could be used to auto-redirect the applicant's browser to a third party payment provider:

```
<BODY onload="submitForm()" ">
  <form name="myform" action="https://someserver/upay/web/index.jsp" method="post">
    <input type="hidden" name="UPAY_SITE_ID" value="3">
    <input type="hidden" name="TICKET" value="12345">
    <input type="hidden" name="TICKET_NAME" value="12345">
  </form>
  <SCRIPT LANGUAGE="JavaScript">function submitForm()
  {document.myform.submit();}
  </SCRIPT>
</BODY>
```

AAWS Web Services Description Language

During setup, the system generates the Web Services Description Language (WSDL) for SAD_ADMISSIONS.

The following diagram lists the SAD_ADMISSIONS web service operations and their messages. The diagram also shows an example of a location from where an online application can access the SAD_ADMISSIONS web service.



Note: SAD_ADMISSIONS is a SOAP-based service. If a SOAP service request XSD contains the *languageCd* parameter, then the service is enabled for National Language Support (NLS). The request message must pass an ISO Locale value as the *languageCd* variable. Valid values can be found in the PeopleTools – Manage Installed Languages page (PeopleTools, Utilities, International, Languages).

Here is an example of an excerpt of a request message that includes this variable:

```
<?xml version="1.0"?>
<SAD_CREATEAPPL_REQ languageCd="fr" xmlns=
"http://xmlns.oracle.com/Enterprise/HCM/services">

  <COUNTRY></COUNTRY>
```

Sample Code for an Online Application

The following example shows how an online application uses ADF to call the SAD_SAVEAPPL service operation:

1. Create the web service proxy using the WSDL URL. It will generate the proxy code (methods) to invoke the service operations.

Sample code of generated proxy:

```
@WebServiceClient(wsdlLocation="http://<hostname>/PSIGW/
PeopleSoftServiceListeningConnector/SAD_ADMISSIONS.1.wsdl",
targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/services/SAD_ADMISSIONS.1",
name="SAD_ADMISSIONS")
public class SAD_ADMISSIONS
    extends Service
{
    private static URL wsdlLocationURL;
    private static Logger logger;
    static
    {
        try
        {
            logger = Logger.getLogger("sadAdmissions.SAD_ADMISSIONS");
            URL baseUrl = SAD_ADMISSIONS.class.getResource(".");
            if (baseUrl == null)
            {
                wsdlLocationURL = SAD_ADMISSIONS.class.getResource("http://<hostname>/PSIGW/
/PeopleSoftServiceListeningConnector/SAD_ADMISSIONS.1.wsdl");
                if (wsdlLocationURL == null)
                {
                    baseUrl = new File(".").toURL();
                    wsdlLocationURL =
                        new URL(baseUrl, "http://<hostname>/PSIGW/PeopleSoftServiceListeningC
onconnector/SAD_ADMISSIONS.1.wsdl");
                }
            }
            else
            {
                if (!baseUrl.getPath().endsWith("/"))
                {
                    baseUrl = new URL(baseUrl, baseUrl.getPath() + "/");
                    wsdlLocationURL =
                        new URL(baseUrl, "http://<hostname>/PSIGW/PeopleSoftServiceListeningCon
nector/SAD_ADMISSIONS.1.wsdl");
                }
            }
            catch (MalformedURLException e)
            {
                logger.log(Level.ALL,
                    "Failed to create wsdlLocationURL using http://<hostname>/PSIGW/Peop
leSoftServiceListeningConnector/SAD_ADMISSIONS.1.wsdl",
                    e);
            }
        }
        //...
        //...
        //...
        @WebEndpoint(name="SAD_ADMISSIONS_Port")
        public SAD_ADMISSIONS_PortType getSAD_ADMISSIONS_Port()
        {
            return (SAD_ADMISSIONS_PortType) super.getPort(new QName("http://xmlns.orac
e.com/Enterprise/HCM/services/SAD_ADMISSIONS.1", "SAD_ADMISSIONS_Port"),
SAD_ADMISSIONS_PortType.class);
        }
        //...
    }

    @WebMethod(operationName="SAD_SAVEAPPL", action="SAD_SAVEAPPL.v1")
    @SOAPBinding(parameterStyle=ParameterStyle.BARE)
    @Action(input="SAD_SAVEAPPL.v1", fault =
        { @FaultAction(value="http://xmlns.oracle.com/Enterprise/HCM/services/SAD_ADM
```

```

ISSIONS.1/SAD_ADMISSIONS_PortType/SAD_SAVEAPPL/Fault/SAD_FAULT_RESP.V1",
    className=sadAdmissions.SAD_FAULT_RESPV1.class) }, output="http://xmlns.o⇒
racle.com/Enterprise/HCM/services/SAD_ADMISSIONS.1/SAD_ADMISSIONS_PortType/SAD_SAVE⇒
APPL_RESP.V1")
    @WebResult(targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/services",
        partName="parameter", name="SAD_SAVEAPPL_RESP")
    public SADSAPPLRESP sadSAVEAPPL(@WebParam(targetNamespace="http://xmlns.oracle⇒
.com/Enterprise/HCM/services",
        partName="parameter", name="SAD_SAVEAPPL_REQ")
        SADSAPPLREQ parameter)
        throws sadAdmissions.SAD_FAULT_RESPV1;

```

2. Use the proxy methods to invoke the service operation:

```

//Create the Application request
SADSAPPLREQ reqSaveAppl = new SADSAPPLREQ();
//Construct the Application request by setter methods created by web service proxy

//Create the Application response
SADSAPPLRESP respSaveAppl = new SADSAPPLRESP();

try {
    SecurityPolicyFeature[] securityFeatures =
        new SecurityPolicyFeature[] { new SecurityPolicyFeature("ora⇒
cle/wss_username_token_client_policy") };
    SAD_ADMISSIONS = new SAD_ADMISSIONS();
    SAD_ADMISSIONS_PortType sad_ADMISSIONS_PortType = SAD_ADMIS⇒
SIONS.getSAD_ADMISSIONS_Port(securityFeatures);

    Map<String, Object> requestContext = ((BindingProvider) sad⇒
_ADMISSIONS_PortType).getRequestContext();
    SAD_ADMISSIONS_PortClient.setPortCredentialProviderList(requestContext)⇒
;

    // Add WS-Security header username & password if we currently
    authenticate (logged on)
    requestContext.put(BindingProvider.USERNAME_PROPERTY, username);
    requestContext.put(BindingProvider.PASSWORD_PROPERTY, password);

    // invoke the sadSAVEAPPL method created by we service proxy
    respSaveAppl = sad_ADMISSIONS_PortType.sadSAVEAPPL(reqSaveAppl);

    // pass the response (respSaveAppl) to the response handler
}
catch (SOAPFaultException sfe) {
    //handle SOAP Fault
}
catch (Exception e) {
    //handle any other exception
}

```


Using the AAWS Sample Online Application

What is SOLA

The primary purpose of the Admission Application Web Services (AAWS) suite (introduced in July, 2010) is to provide academic institutions, across the globe, with the ability to capture and move data from separately designed and constructed admissions applications into staging and production tables. Implementing and using this important technology and functionality requires in depth knowledge of Service-Oriented Architecture (SOA), Web Services Description Language (WSDL), and user interface design. The sample online application (SOLA) is an additional offering in Oracle's continuing efforts to provide documentation, references, and tools that will guide and assist academic institutions in their implementation of AAWS. SOLA provides the following important features:

- A sample user interface in a familiar PeopleTools package that can be easily understood and referenced.
- A pre-constructed user interface that utilizes and demonstrates how delivered AAWS is designed, organized, and managed. The sample interface includes embedded technical annotations within the delivered code.
- A delivered example of how the Constituent Transaction Manager (CTM) and AAWS work within a user interface.
- A working sample that can be used to test transaction setup and data update rules.
- A working sample that can be used to create data in CTM and application staging tables.

By providing a standalone online application sample, Oracle hopes to reduce the time required for successful AAWS implementations and improve uptake of future SOA based development.

To navigate to the SOLA component, select **Set Up SACR >System Administration >Utilities >Sample User Interfaces >Sample Online Application**.

What SOLA is Not

SOLA as delivered, is *not* intended to be used as an online application representing your institution. It is a teaching tool and a reference for guidance on your implementation of AAWS. While there is nothing preventing institutions from using SOLA as a foundation to develop an online admissions application according to their requirements, Campus Solutions does *not* recommend the delivered user interface to be deployed for applicants. As you will see later on in this SOLA documentation, we have delivered a very basic design of an admission application and we fully expect that the sample user interface will not reflect the items you wish for your applicants to submit. Because SOLA is an example, we do not anticipate updating any of the data elements or the design of the delivered sample user interface.

Audience

This SOLA documentation is directed specifically at the advanced developer who is interested in understanding the relationship between AAWS and a *working* sample online application, developed using the PeopleTools Internet Architecture (PIA). We expect that the SOA concepts and technical capabilities illustrated with this example will be applicable when implementing AAWS with other user interface tools.

In order to gain a comprehensive understanding of how SOLA works, your developer needs to be aware of three distinct types of documentation associated with this sample feature:

- The first is this SOLA documentation. This documentation contains a technical overview of how SOLA works from a functional perspective, its design, as well as some references to additional supporting documentation.
- The second is a complete object inventory. This is a HTML version of a Technical Design Document (TDD). In this document you will find every object (that is, Fields, Record Definitions, Pages, Components, PeopleCode, and so on.) that make up SOLA. You can find this document in My Oracle Support (ID 1492390.1).
- Finally, there is the application package PeopleCode for this sample (SAD_OLA_DEMO). In each of the application classes are comments documenting the inner workings of SOLA.

The developer is strongly encouraged to become knowledgeable with the content in all three types of documentation to gain a comfortable understanding of AAWS and how it interacts within SOLA. When combined and internalized, this troika of information is intended to educate the developer on the use and deployment of AAWS within your institution.

Supporting Audience

In the Required Setups section of this SOLA documentation you will notice that AAWS has a dependency with other functional areas; specifically Student Financials and Campus Community. It is very likely that you will need to establish a close relationship (both technically and functionally) between AAWS and these areas.

Required Setups

Before you can begin examining and evaluating SOLA, you need to perform the following setups:

Setup Areas	See
Enable the CTM, AAWS and SF web services that SOLA uses to <i>Active</i> .	Product documentation for <i>PeopleTools: Integration Broker</i>
Set up the URL definition SAD_APPL_ATCH. SOLA uses SAD_APPL_ATCH for attachments.	Setting Up the Attachments URL

Setup Areas	See
Set up the Application Fee Waiver Basis Codes on the Application Fee Waiver Basis page and AAWS Application Fee and Waiver Processing parameters on the Application Center Table page.	Setting Up Your Recruiting Structure
Set up the Data Update Rule Entry component to be used for the transaction.	"Understanding CTM" (Campus Community Fundamentals)
Set up a transaction or use the delivered admissions application transaction for testing.	"Understanding CTM" (Campus Community Fundamentals)
Set up the Application Configuration component.	Configuring Admission Transactions
Set up SOLA and verify whether SOLA is set up properly	SOLA Setup and Verification
New User Registration Setup: To configure a New User Registration context that will provision access to your Online Application Home page and transfer the applicant directly to this page after successfully authenticating to your system.	"Understanding New User Registration" (Campus Community Fundamentals)
Setting Up Online Payment for Application Fee	Setting Up Hosted Payment

Web Services Used by SOLA

This table lists the web services that SOLA uses and where you can find documentation about these services:

Web Service	Web Service Operations	See
SAD_ADMISSIONS	<ul style="list-style-type: none"> • SAD_CREATEAPPL (Create admission application) • SAD_GETAPPL (Get admission application) • SAD_GETAPPL_RESP (Get admission application response) • SAD_GETAPPLS (Get admission applications) • SAD_GETAPPLS_RESP (Get admission applications response) • SAD_SAVEAPPL (Save admission application) • SAD_SUBMITAPPL (Submit admission application) • SAD_GETATTACH (Get admission attachments) 	Understanding AAWS
SSF_EPAYMENT_TRANSACTION	<ul style="list-style-type: none"> • SSF_INITIATE_EPAYMENT (Initiate an ePayment) • SSF_COMPLETE_EPAYMENT (Complete an ePayment) 	<p>How to Test AAWS and Hosted Payment SSF_INITIATE_EPAYMENT Service Operation Tester in My Oracle Support (ID 1349409.1)</p> <p>Understanding AAWS</p>

New User Registration Framework and SOLA

The New User Registration framework, integrated with SOLA, enables an applicant to sign up for a user ID. The framework provides a sample New User Registration login page that you can customize and deploy to suit your institution's requirements. An applicant can use this page to sign into the system or to register for a user ID. The applicant accesses the New User Registration login page from a link or button you would have added to your portal (for example: "To apply online, click here"). Once transferred to the New User Registration login page, the applicant can create a new user ID or use an existing one if the applicant already has one (for example the applicant has taken courses previously in his or her life). Once authenticated to your system, New User Registration can provision the applicant with security access to your Online Application component and then automatically transfer the applicant directly to that page. To do so, a New User Registration Context specific to Online Application needs to be created.

"Understanding New User Registration" (Campus Community Fundamentals)

Entity Registry and SOLA

This table lists the records and their corresponding entities that are populated through Constituent Staging and Application Transactions staging tables from SOLA:

Entity ID	Entity Name	Staging Record
SCC_ENTITY_20090521054417	Constituent	SCC_STG_CONSTIT
SCC_ENTITY_20090520155540	Person Data Effdt	SCC_STG_PDE
SCC_ENTITY_20090521053330	Names	SCC_STG_NAMES
SCC_ENTITY_20090520155755	Address	SCC_STG_ADDR
SCC_ENTITY_20090520155634	Phone	SCC_STG_PHONE
SCC_ENTITY_20090521044252	Email Address	SCC_STG_EMAIL
SCC_ENTITY_20090520155342	National ID	SCC_STG_NID
SCC_ENTITY_20090519160928	Citizenship	SCC_STG_CITZN
SCC_ENTITY_20090520035051	Person Data (USA)	SCC_STG_PRSDATU
SCC_ENTITY_20090723101739	Emergency Contact	SCC_STG_EMG_CNT
SCC_ENTITY_20090723101507	Emergency Phone	SCC_STG_EMG_PHN
SCC_ENTITY_20090521094345	Application	SAD_APL_DAT_STG
SCC_ENTITY_20090521094125	Career Sequence	SAD_APP_CSQ_STG
SCC_ENTITY_20090521093827	Academic Program	SAD_APL_PRG_STG
SCC_ENTITY_20090521093651	Academic Plan	SAD_APL_PLN_STG
SCC_ENTITY_20090520153020	Student Career (Constituent)	SCC_STG_STD_CAR
SCC_ENTITY_20090521090104	Application Attachment	SAD_APLATCH_STG
SCC_ENTITY_20090521084930	File Attachment	SCC_FATTACH_WRK

Entity ID	Entity Name	Staging Record
SCC_ENTITY_20090521043203	Academic History	SCC_STG_ACADHST
SCC_ENTITY_20090520160401	External Academic Data	SCC_STG_EXACDDT
SCC_ENTITY_20090521042406	External Degree	SCC_STG_EXTDEGR
SCC_ENTITY_20090625090929	Q&A Application Extension	SCC_EXTN_STG
N/A	N/A	SCC_SL_TRNMAP (Records a mapping between the Transaction Manager constituent and any transaction the constituent has participated.)

Related Links

"Understanding Entity Registry" (Campus Community Fundamentals)

Functional Flow for SOLA

This section discusses the functional flow of how an applicant registers for a user ID and uses SOLA.

New User Registration

Steps:

1. The applicant registers and authenticates to access your system.

The applicant should be allowed to access your system by using an existing user ID or by creating a new one. Delivered with your system is a New User Registration login sample page (**Set Up SACR >System Administration >Utilities >Sample User Interfaces >New User Registration**). The page is a sample user interface that shows how security can be handled to access your system, provision a new or an existing user ID with the security to access your Online Application page and be automatically transferred to that page.

While the New User Registration login sample page requires a kiosk to be deployed (where the anonymous user gets logged in as a true user), also delivered with your system is a New User Registration Tester page (SCC_NUR_TESTER) (**Set Up SACR >System Administration >Utilities >Sample User Interfaces >New User Registration Tester**). This page allows you to evaluate the benefits of integrating a self-service transaction such as Online Application to New User Registration framework.

Note: Do not deploy the New User Registration Tester page in a production environment.

This example illustrates the fields and controls on the New User Registration Tester page.

2. The applicant can use an existing user ID and password, or can create a new one by selecting the **Need a User ID? Yes/No** check box. When doing so the Confirm Password and any other constituent fields you may want to add to the page are displayed. When the applicant clicks the **Create User** button, the system invokes the SCC_USERREG_CREATEACCT web service operation. This operation provisions an applicant with an ID and password as well as some generic roles. If set up with a New User Registration Context, the New User Registration framework provisions the new or existing user ID with some specific security roles to access the Online Application page and transfers the applicant directly to that page.

Creating a New Application

Steps:

1. The applicant signs in to access the institution's Admissions Application home page. The system invokes the web service operations SCC_USERREG_AUTHENTICATE when the applicant signs into the system and SAD_GETAPPLS when the applicant reaches the Admissions Application home page.

Because this is the first time the applicant is visiting the institution's Application Home page, the web service operation SAD_GETAPPLS will not return any application data.

SOLA includes a sample Application Home page (SAD_OLA_HOME) (**Set Up SACR >System Administration >Utilities >Sample User Interfaces >Sample Online Application**).

This example illustrates the fields and controls on the Application Home page.

Student Home Page

Current Applications

Application Nbr	Institution	Academic Career	Status

First 1 of 1 Last

Create A New Application

*Institution	*Academic Career	*Admit Term	*Academic Program	*Academic Plan	*Admit Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Create Application

- The applicant selects the institution, academic career, admit term, academic program, academic plan, and admit type he or she wishes to apply for.
- The applicant clicks the **Create Application** button. This invokes the SAD_CREATEAPPL web service operation.
- Because this is the first interaction with the institution (from an admissions perspective), the web service operation SAD_CREATEAPPL minimally creates row(s) in both the constituent record (SCC_STG_NAMES) and the academic program stack (SAD_APL_DAT_STG, SAD_APL_PLN_STG, SAD_APL_PRG_STG, and SAD_APP_CSQ_STG).
- When the applicant clicks the **Create Application** button, the system displays the first of six pages that the applicant uses to fill out the application. At this point, the applicant can fill out the application and submit the application. When the **Submit** button is clicked, the system invokes the SAD_SUBMITAPPL service operation.

This is an example of one of the six pages for application data entry.

Basic Information

Legal First Name: Jane

Legal Middle Name:

Legal Last Name: Smith

Name Suffix:

Preferred First Name:

Date of Birth:

Birth Country:

Birth City:

Birth State:

Gender:

Citizenship Information

Country:

Military Information

Military Status:

Cancel Save Next Step

6. Instead of entering data in all the six pages at one time, the applicant can fill out the application over several sessions. To do this, the applicant can click the **Save** button and the application data is saved to the staging tables. When the **Save** button is clicked, the system invokes the SAD_SAVEAPPL service operation.
7. If the applicant elects to cancel the application process, a warning message appears to confirm the cancellation. The applicant can either continue to cancel the application and nothing will be saved and the applicant returns to the Application Home page. Else, the applicant can go back to the page where he or she clicked the Cancel button and continue with the application.
8. When SAD_SAVEAPPL or SAD_SUBMITAPPL is invoked by the applicant's actions, the system captures all the data that has been entered and saves it to the appropriate staging tables.

Editing Existing Application

Steps:

1. Again through the New User Registration login page (or a custom version of it), the applicant signs in using an existing user ID. The applicant is automatically transferred to the Online Application page and the system invokes the SAD_GETAPPLS service operation. This service operation returns all the applications that pertain to the applicant. To keep this scenario simple, let us assume that there is only one application that the applicant is working on and therefore the home page displays that application.

This is an example of the Application Home page displaying one saved application.

Student Home Page

Current Applications

Application Nbr	Institution	Academic Career	Status	Options
00024880	PSUNV	UGRD	SAVED	

Create A New Application

*Institution	*Academic Career	*Admit Term	*Academic Program	*Academic Plan	*Admit Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

2. When the applicant clicks the **Edit** button, the system invokes the SAD_GETAPPL service operation.

Note: The service operation SAD_GETATTCH also gets fired. SAD_GETATTCH will retrieve any attachments that the applicant submitted in an earlier session.

3. When the applicant clicks the **Edit** button, the system displays the first of six pages that the applicant uses to fill out or correct any previously entered data for the application. At this point, the applicant can fill out the application.
4. The applicant can repeat the above steps as many times as he or she would like until the application is finally submitted.

Editing Existing Multiple Applications and Reviewing Multiple Application Statuses

Steps:

1. The applicant signs into the institution's Admissions Application home page. The system invokes the SAD_GETAPPLS service operation. This service operation returns all the applications that pertain to the applicant. This time, let us assume that there are several applications in various states and statuses.
2. The Current Applications grid displays all the applications of the applicant. Let us assume that from this list of applications, one application has been *Submitted*. Depending on how you have defined how the application is to be treated upon submission, the application can either be in *Submitted* or *Posted*

status. If the application is in *Submitted* or *Posted* status, the only action available to the applicant is to view that specific application (the applicant cannot edit the application).

This is an example of the Application Home page with multiple applications.

Student Home Page

Current Applications

Application Nbr	Institution	Academic Career	Status	Options
00024971	PSUNV	UGRD	ERROR	View
00024972	PSUNV	UENG	POSTED	View
00024973	PSUNV	UENG	SAVED	Edit

Create A New Application

*Institution	*Academic Career	*Admit Term	*Academic Program	*Academic Plan	*Admit Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Create Application](#)

- If the applicant clicks the **View** button for the submitted or posted application, the Application View page (SAD_OLA_VIEW) appears. This page presents in a display-only, linear format, all of the information the applicant submitted. If the applicant wants to update this application, the Application View page requests the applicant to contact the Admissions office to initiate any updates. When the applicant clicks the **View** button, the system invokes the SAD_GETAPPL service operation.

This example illustrates the fields and controls on the Application View page (1 of 3).

Your application has been submitted and can no longer be updated. If changes are required, please contact the Admissions Office.

Basic Information	
Legal First Name	Jane
Legal Middle Name	Mary
Legal Last Name	Smith
Name Suffix	
Preferred First Name	Lola
Date of Birth	01/01/1980
Birth Country	USA United States
Birth City	San Diego
Birth State	CA California
Gender	Female

Citizenship Information	
Country	USA United States
National ID	XXXXXXXX

Military Information	
Military Status	No Military Service

Permanent Address	
Country	USA United States
Address 1	110 First Street
Address 2	
Address 3	
City	Northridge
State	CA California
Postal	91324
County	Los Angeles

This example illustrates the fields and controls on the Application View page (2 of 3).

Mailing Address	
Country	USA United States
Address 1	12 Main
Address 2	
Address 3	
City	Belford
State	NJ New Jersey
Postal	07718
County	

Phone and Email Information	
Home Phone	818/555-1234
Mobile Phone	888/555-1212
Personal Email	Jsmith123@oracle.com

Emergency Contact Information	
Contact Name	John Smith
Relationship	Parent

Emergency Contact Address Information	
Country	CAN Canada
Address 1	1000 Skippy Lane
Address 2	Unit A
Address 3	
Address 4	
City	Gray Creek
Province	BC British Columbia
Postal	VOB1S0

Emergency Contact Phone Information	
Primary Phone	250/888-4785
Mobile Phone	250/818-4569

This example illustrates the fields and controls on the Application View page (3 of 3).

☐ I was Home Schooled

Last School Attended

External Org ID	000010025	Chesapeake College
Level of Study	Undergraduate	
From Date	09/12/1980	
To Date	06/15/1984	
Degree	BS	Bachelor of Science
Degree Date	06/15/1984	

Other Schools Attended

Institution	Attendance	Address	ID Codes
External Org ID	Name	Degree	Degree Date
1		Certificate	06/16/1978

Attachments

Question	Attached File
1 What influenced you to apply to the university?	What_influenced_me.txt
2 Describe your most meaningful activity outside the classroom.	My_most_meaningful.txt

Additional Questions

What is your favorite color?

Blue

What is your favorite food?

Sushi

We have to ask -

Have you ever been convicted of a felony?

☐ Yes
 ☒ No

Cancel

Note: Notice that External Org ID and Name are blank in the Other Schools Attended section. This is because the applicant indicated that he or she was unable to locate the school from the External Org ID list and the School Setup page does not have a default External Org ID.

- For the remaining application(s) that have yet to be submitted, the applicant can update them as outlined in the previous Editing Existing Application subsection.

SOLA Pages for Entering Application Data

This subsection discusses the six SOLA pages that the applicant can use to enter application data.

Basic Information page (SAD_OLA_BASIC)

This example illustrates the fields and controls on the Basic Information page.

The screenshot displays the 'Basic Information' page of the SOLA application. At the top, there is a navigation bar with tabs: 'Basic Information' (selected), 'Contact Information', 'Emergency Contact', 'Academics', 'Other', and 'Submit'. The main content area is divided into three sections: 'Basic Information', 'Citizenship Information', and 'Military Information'. The 'Basic Information' section contains fields for Legal First Name (Jane), Legal Middle Name (Mary), Legal Last Name (Smith), Name Suffix (empty), Preferred First Name (Lola), Date of Birth (01/01/1980), Birth Country (USA), Birth City (San Diego), Birth State (CA), and Gender (Female). The 'Citizenship Information' section contains fields for Country (USA) and National ID (XXXXXXXX). The 'Military Information' section contains a dropdown for Military Status (No Military Service). At the bottom, there are 'Cancel', 'Save', and 'Next Step' buttons.

- This SOLA page captures basic biographical data (that is, name, gender, and birth information). The system saves the legal name entered here with the name type of *Primary*. If the applicant enters a name in the Preferred First Name field, an additional row is written to the SCC_STG_NAMES with a name type of *Preferred*.
- When the applicant accesses this page for the first time, the page hides the **National ID** field. When the applicant enters a value for Country, the system executes the *determineNIDType* method. This method determines whether to display the **National ID** field based on the setup within NID_TYPE_TBL.

Note: If the **National ID** field appears, then the page applies the validation associated with that country's national ID number during the save process.

Contact Information page (SAD_OLA_CONTACT)

This is how the system presents the Contact Information page when the applicant accesses it for the first time. Note that the page hides the permanent and mailing address fields:

This example illustrates the fields and controls on the Contact Information page.

The screenshot shows the 'Contact Information' page with the following elements:

- Tabs:** Basic Information, **Contact Information**, Emergency Contact, Academics, Other, Submit.
- Permanent Address:** Country dropdown, Mailing Address Same As Permanent? checkbox.
- Mailing Address:** Country dropdown.
- Phone and Email Information:**
 - Home Phone: 818/555-1234
 - Mobile Phone: 888/555-1212
 - Personal Email: Jsmith123@oracle.com
- Buttons:** Previous Step, Cancel, Save, Next Step.

- The page hides the address fields to support address formats based on a specific country. SOLA supports address formats for the following countries:
 - (ARG) Argentina
 - (AUS) Australia
 - (BRA) Brazil
 - (CAN) Canada
 - (CHN) China
 - (FRA) France
 - (IND) India
 - (SNG) Singapore
 - (USA) United States

- When the applicant selects anyone of these countries, SOLA will display the address format specific to that country:

This example illustrates the fields and controls on the Contact Information page for a particular country.

Basic Information **Contact Information** Emergency Contact Academics Other Submit

Permanent Address Mailing Address Same As Permanent? ☐

Country Brazil

Street

Number

Complement

Complement 2

Neighborhood

City

UF

CEP

Mailing Address

Country

Phone and Email Information

Home Phone

Mobile Phone

Personal Email

- If the applicant selects a country other than those mentioned previously, the page renders a default address format.
- To copy the permanent address values to the mailing address fields, the applicant can select the **Mailing Address Same as Permanent** check box. When the applicant selects this check box, the system executes the *copyPermAddressToMailAddress* method to copy the values supplied in the Permanent Address fields to the Mailing Address fields. After copying, the page hides this check box. However, on any subsequent return to this page, the check box will again appear.

Note: If the applicant changes the country value for any of the address types, this SOLA page will blank out any previously saved address information for that address type. The handling of name, address and other personal information in SOLA represents design examples of how delivered web services can support a user interface.

Emergency Contact page (SAD_OLA_CONTACT)

This example illustrates the fields and controls on the Emergency Contact page.

The screenshot displays the 'Emergency Contact' page within a web application. At the top, there is a navigation bar with tabs: 'Basic Information', 'Contact Information', 'Emergency Contact' (which is highlighted), 'Academics', 'Other', and 'Submit'. Each tab is accompanied by a small globe icon.

The main content area is divided into three sections, each with a title and a set of form fields:

- Emergency Contact Information:**
 - Contact Name:** A text input field containing 'John Smith'. Below the field is a placeholder text: '<First Name><space><Last Name>'. To the left of the field is the label 'Contact Name'.
 - Relationship:** A dropdown menu with 'Parent' selected. To the left of the dropdown is the label 'Relationship'.
- Emergency Contact Address Information:**
 - Country:** A text input field containing 'CAN' and a search icon. To the right of the field is the text 'Canada'. To the left of the field is the label 'Country'.
 - Address 1:** A text input field containing '1000 Skippy Lane'. To the left of the field is the label 'Address 1'.
 - Address 2:** A text input field containing 'Unit A'. To the left of the field is the label 'Address 2'.
 - Address 3:** An empty text input field. To the left of the field is the label 'Address 3'.
 - Address 4:** An empty text input field. To the left of the field is the label 'Address 4'.
 - City:** A text input field containing 'Gray Creek'. To the left of the field is the label 'City'.
 - Province:** A text input field containing 'BC' and a search icon. To the right of the field is the text 'British Columbia'. To the left of the field is the label 'Province'.
 - Postal:** A text input field containing 'V0B 1S0'. To the left of the field is the label 'Postal'.
- Emergency Contact Phone Information:**
 - Primary Phone:** A text input field containing '250/888-4785'. To the left of the field is the label 'Primary Phone'.
 - Mobile Phone:** A text input field containing '250/818-4569'. To the left of the field is the label 'Mobile Phone'.

At the bottom of the page, there are four buttons: 'Previous Step', 'Cancel', 'Save', and 'Next Step'.

The address functionality on this page is similar to the Contact Information page.

Academics page (SAD_OLA_ACAD)

This example illustrates the fields and controls on the Academics page.

The screenshot displays the Academics page (SAD_OLA_ACAD) with the following elements:

- Navigation Tabs:** Basic Information, Contact Information, Emergency Contact, Academics (selected), Other, and Submit.
- I was Home Schooled:** A checkbox labeled "I was Home Schooled".
- Last School Attended:** A section containing:
 - I can't find my school:** A checkbox.
 - External Org ID:** A text input field with a search icon.
 - Level of Study:** A dropdown menu.
 - From Date:** A date input field with a calendar icon.
 - To Date:** A date input field with a calendar icon.
 - Degree:** A text input field with a search icon.
 - Degree Date:** A date input field with a calendar icon.
- Other Schools Attended:** A section with a header and a table area.
- Buttons:** Previous Step, Cancel, Save, and Next Step.

- This is an example of how the Academics page is displayed when an applicant accesses it for the first time. This is done to preserve a predefined sequence numbering schema associated with the admissions application history.
- If the applicant indicates that he or she was home schooled, the system writes a row to SCC_STG_ACADHST with a sequence number of one. Information pertaining to the Last School Attended will be assigned a sequence number of 2. The system will increment the sequence number for each Other Schools Attended record that the applicant adds.
- If the applicant does not indicate that he or she was home schooled, then the information pertaining to the Last School Attended will get a sequence number of one.
- If the applicant is unable to find his or her institution in the External Org ID drop down list, then they have the option of indicating such by selecting the **I can't find my school** check box. When the applicant selects this check box, the page displays additional fields that the applicant can use to specify the school details.

This is an example of the Academics page with the I cannot find my school check box selected.

Basic Information Contact Information Emergency Contact **Academics** Other Submit

☒ I was Home Schooled

Last School Attended

☒ I can't find my school

External Org ID

*School Name

School Country

School Address

School City

School State

School Postal

School CEEB Code

School ACT Code

Level of Study

From Date

To Date

Degree

Degree Date

Other Schools Attended

- When the applicant selects the check box, the system disables the **External Org ID** field and marks the **School Name** field as a required field. All other fields are optional.

Note: Suppose you have indicated that the application requires manual reconciliation for both home school and unlisted school on the School Setup page of the Application Configuration component. In such a case, if the applicant indicates that he or she was either home schooled or is unable to locate his or her institution or indicates both, then the application will get a status of *Error* when submitted.

Suppose you have specified a default External Org ID for both home school and unlisted school on the School Setup. In such a case, if the applicant indicates that he or she was either home schooled or is unable to locate his or her institution or indicates both, then the system automatically populates the default External Org ID when application is submitted.

Note: If the applicant provides more than one school identified as *I can't find my school*, only the first will receive the default Org ID and the subsequent schools Org IDs will be set to blank and a reconciliation error will be generated.

- If the applicant has entered the level of study and the dates attended, the system writes a row to SCC_STG_EXACDDT.

Note: The applicant must supply all three values: level of study (external career), and both to and from dates in order to write to SCC_STG_EXACDDT.

- If the applicant has entered a degree and the date in which the degree was obtained, the system writes a row to SCC_STG_EXTDEGR.

Note: The applicant must supply both the degree and degree date values to write to SCC_STG_EXTDEGR.

- When the applicant enters an External Org ID or a school name, then the fields in the Other Schools Attended group box become available. Same rules mentioned previously apply to the fields in the Other Schools Attended group box
- The applicant can enter as many additional Other Schools Attended records by clicking the plus sign button. Conversely, clicking the minus sign button will delete an Other Schools Attended record.

Note: The system performs duplicate checking on Org IDs when the applicant supplies both a *Last School Attended* and at least one *Other Schools Attended*. In addition, SOLA checks for duplicate Org IDs in the *Other Schools Attended* when more than one is supplied by the applicant.

Other page (SAD_OLA_OTHER)

This example illustrates the fields and controls on the Other page.

Basic Information

Contact Information

Emergency Contact

Academics

Other

Submit

Attachments

Please attach documents answering the following questions.

	Question	Attachment	Upload
1	What influenced you to apply to the university?	What_influenced_me.txt	Upload
2	Describe your most meaningful activity outside the classroom.	My_most_meaningful.txt	Upload

Additional Questions

What is your favorite color?

Maximum 100 characters

What is your favorite food?

Maximum 100 characters

We have to ask -

Have you ever been convicted of a felony?

☐ Yes
 ☒ No

Previous Step

Cancel

Save

Next Step

- The questions that appear in the Attachments and Additional Questions group boxes are derived from the PeopleTools message catalog.
- The Additional Questions group box uses the sample Q&A Application Extension entity.

Submit page (SAD_OLA_SUBMIT)

This example illustrates the fields and controls on the Submit page.

The screenshot shows a web application interface for the Submit page. At the top, there is a horizontal navigation bar with seven tabs: 'Basic Information', 'Contact Information', 'Emergency Contact', 'Academics', 'Other', and 'Submit'. Each tab is preceded by a small globe icon. The 'Submit' tab is highlighted in blue. Below the navigation bar, the text reads 'You are almost finished with the application Jane'. Underneath this, there is a checkbox with a checkmark inside, followed by the text 'I certify that the information given on this application is complete and correct to the best of my knowledge.' At the bottom of the form, there are four buttons: 'Previous Step', 'Cancel', 'Save', and 'Submit'. The 'Submit' button is highlighted in blue.

- When the applicant electronically signs the application (that is, selects the I certify check box on the Submit page), the **Submit** button becomes available.
- Clicking the **Submit** button submits that application. Depending on how you have defined the application to be processed during submission, the application can take many routes. Refer to the discussion on “Setting Up Application Processing Centers” in the “Setting Up Your Recruiting Structure” section to fully understand the submit process.

To understand application fee processing on submission, see [Setting Up Application Processing Centers](#)

Note: The handling of attachments, additional questions, and messaging regarding the completion of an application illustrated by SOLA represents design examples of how delivered web services can support a user interface and these design examples are not intended to be deployed for your applicants.

Paying Application Fees or Requesting Fee Waiver After Submitting Application

Steps:

1. Once the applicant completes the application and is ready to submit the application, the applicant clicks the **Submit** button.
2. If a fee is required with the option to pay later as defined on the Application Center Table setup page, the applicant is presented with a message to pay the fee/request a waiver now or defer payment until later. If the student selects the **Yes** button, they are taken to the Fee/Waiver Page. If they select the **No** button, they are taken to the Submit Page.

This is an example of the message for payment options.

A message box with a blue header bar labeled "Message". The text inside reads: "Click YES if you will be paying your fee now (Included Waivers) OR click NO if you will be deferring your payment. (0,0)". At the bottom right, there are two buttons: "Yes" and "No".

3. If a fee is required as defined on the Application Center Table setup page, the applicant is presented with the Fee/Waiver page (SAD_OLA_FEECALC), where he or she may request a waiver or pay the fee. Actions allowed on this page are governed by the options defined on the Application Center Table setup page.

This example illustrates the fields and controls on the Fee/Waiver page (Paying Application Fees).

The screenshot shows the "Fee/Waiver" page with a navigation bar at the top containing links: Basic Information, Contact Information, Emergency Contact, Academics, Other, and Submit. The main content area has two sections. The first section, "Application Fees", displays the "Application Fee Amount" as 10.00 USD and a "Select Payment Type" dropdown menu currently set to "CC". There is a "Pay Fees Now" button. The second section, "Waiver Request", contains the text "I'd like to request a fee waiver" followed by a search input field and a magnifying glass icon. There is a "Request Waiver" button. At the bottom center, there is a "Cancel" button.

4. When the applicant clicks the **Pay Fees Now** button, the system invokes the SSF_INITIATE_EPAYMENT service operation. The system uses the information from the response of this service operation to redirect the applicant to the third party payment provider, where additional payment information is collected to pay the fees. This is accomplished by setting the value of the HTML_AREA on page SAD_OLA_3RDPARTY to the value of the element SCC_HTML_STRING from the SSF_INITIATE_EPAYMENT response. A transfer to page SAD_OLA_3RDPARTY will launch the applicant to the third party payment provider.

For an example of the SCC_HTML_STRING, see [Payment Integration Web Service Operations](#)

Note: The third party payment provider will require return URLs in order to navigate the applicant back to Campus Solutions after processing the transaction. These return URLs should correspond to the Weblib functions defined in the Hosted Payment Adapter Settings. The system delivers iScripts for SOLA to handle the post back from the third party payment provider.

This example illustrates the fields and controls on the Hosted Payment Adapter page.

Hosted Payment Adapter Parameters

Hosted Payment Adapter: SAMPLE_OLA_MODEL1A

HTML Definition: SAMPLE_OLA_TP_FORM

Third Party URL: SAMPLE_TP_URL

Record Name: WEBLIB_SAD_OLA

Field Name: SAD_OLA_AWS

Return URL Type	Weblib Function		
Successful Return URL	IScript_Successful_Payment_TP	+	-
Canceled Return URL	IScript_Cancelled_Payment_TP	+	-
Error Return URL	IScript_Error_Payment_TP	+	-

In the above example graphic, the success URL can be defined in the third party payment provider site as *https://schoolserver/psc/ps/EMPLOYEE/HRMS/s/WEBLIB_SAD_OLA.SAD_OLA_AWS.FieldFormula.IScript_Successful_Payment_TP*.

Important! If the school is already using the Hosted Payment feature in Self Service Make a Payment or Cashiering, a new Hosted Payment Adapter needs to be created in order to use the delivered iScripts for SOLA. The new Hosted Payment Adapter may point to the same Application Class ID the school is already using.

This example illustrates the fields and controls on the Adapter Table page.

Adapter Table

Adapter ID: SAMPLE_OLA_MODEL1A

Adapter Type: Hosted Payment Adapters

Description: Model1A for SOLA

Long Description:

Parameters

Root Package ID: SCC_HOSTED_PAYMENT

Path: Adapters

Application Class ID: HostedM1a

Save Return to Search Previous in List Next in List Notify Add Update/Display

For more details, refer to the Campus Solutions 9.0 Electronic Payment Integration Developer's Reference Guide in My Oracle Support (ID 1982664.1) on how to set up the Hosted Payment Adapter Setting. In addition to creating a new adapter, the new iScripts will need to be defined in the permission list security for the applicant.

The new SOLA iScripts will invoke the SSF_COMPLETE_EPAYMENT service operation. This service operation will authorize the payment and complete the application.

5. If a fee waiver option has been selected within the Application Center Table component, then the applicant can request a waiver and click the **Request Waiver** button.

This example illustrates the fields and controls on the Fee/Waiver page (Requesting Waiver).

The screenshot displays a web interface for requesting a fee waiver. At the top, there is a navigation bar with tabs: Basic Information, Contact Information, Emergency Contact, Academics, Other, and Submit. The 'Basic Information' tab is selected. Below the navigation bar, there are two main sections:

- Application Fees:** This section contains a label 'Application Fee Amount' with a value of '10.00 USD'. Below it is a label 'Select Payment Type' with a dropdown menu. A 'Pay Fees Now' button is located to the right of the dropdown.
- Waiver Request:** This section contains a label 'I'd like to request a fee waiver' followed by a text input field containing 'CEEB' and a search icon. To the right of the input field is the text 'College Board Waiver'. A 'Request Waiver' button is located below the input field.

A 'Cancel' button is located at the bottom center of the form.

Note: The display of captured data and the use of application fee payment illustrated by SOLA represent design examples of how delivered web services can support a user interface.

Data Flow

This section discusses how the SOLA pages and the SQL tables exchange application data.

Campus Solutions SOLA Pages to SQL Tables

Flow:

1. The applicant enters data into the SOLA page.
2. The fields in each SOLA page reflect one or more SQL views. Each view represents the specific type of data that SOLA is collecting (that is, address, emergency contact, academic data and so on.). The views themselves are not traditional database views, but *hollow views* that exist merely to collect and display the data on the SOLA page.
3. When the applicant clicks the Save or Submit button, SOLA copies the data within each view to the view's corresponding entity in the Entity Registry. This is how SOLA processes the data into the entity:
 - The method associated with each entity performs any necessary data validation.
 - The toXMLNode method then converts the entity content into an XML representation that the SOAP-based web services require.
 - Once all the data is entered in the SOLA pages and their respective views have been processed, SOLA sends the XML request and invokes the SAD_SAVEAPPL web service operation.

- The SAD_SAVEAPPL service operation then takes the XML request string and deconstructs it node by node back into an entity.
- As each node is filled up with data, SAD_SAVEAPPL invokes the corresponding Entity Registry ID.

Note: SOLA may look like any standard component in Campus Solutions, but the key concept to understand is that the data entered on the SOLA pages never directly interact with the SQL table(s) as it does in other Campus Solutions pages.

SQL Tables to Campus Solutions SOLA Pages

Flow:

1. The applicant signs into institution's Admissions Application home page and accesses the SOLA component.
2. Assuming that this is not the first time the applicant is visiting the Admissions Application page, SOLA invokes the SAD_GETAPPLS web service operation. The SAD_GETAPPLS_RESP XML message contains all the key values for the applicant's applications.
3. This *key* information is presented in a grid format for the applicant to choose from, the applicant also has the option to create an entirely new application.
4. The applicant clicks the View button or the Edit button for an existing application and SOLA passes the key values for that specific application to the SAD_GET_APPL web service operation.
5. The SAD_GETAPPL_RESP XML response message contains all the data (both constituent and academic) associated with that specific application.
6. SOLA deconstructs the XML response message node by node and moves this deconstructed message to the corresponding SQL Views within the application page(s) in SOLA.
7. Once the XML response has been deconstructed, SOLA displays the page(s) to the applicant.

SOLA Setup and Verification

This section discusses the required setup and the verification to ensure that SOLA is configured properly.

Step 1: Update Admissions URL

Procedure:

1. Access the URL Maintenance component (**PeopleTools** > **Utilities** > **Administration** > **URLs**).
2. Enter *SAD_APPL_ATCH* in the Search by field:

This is an example of searching for SAD_APPL_ATCH in the URL Maintenance component.

URL Maintenance

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

Search by: URL Identifier ▼ begins with SAD_APPL_ATCH

Search Advanced Search

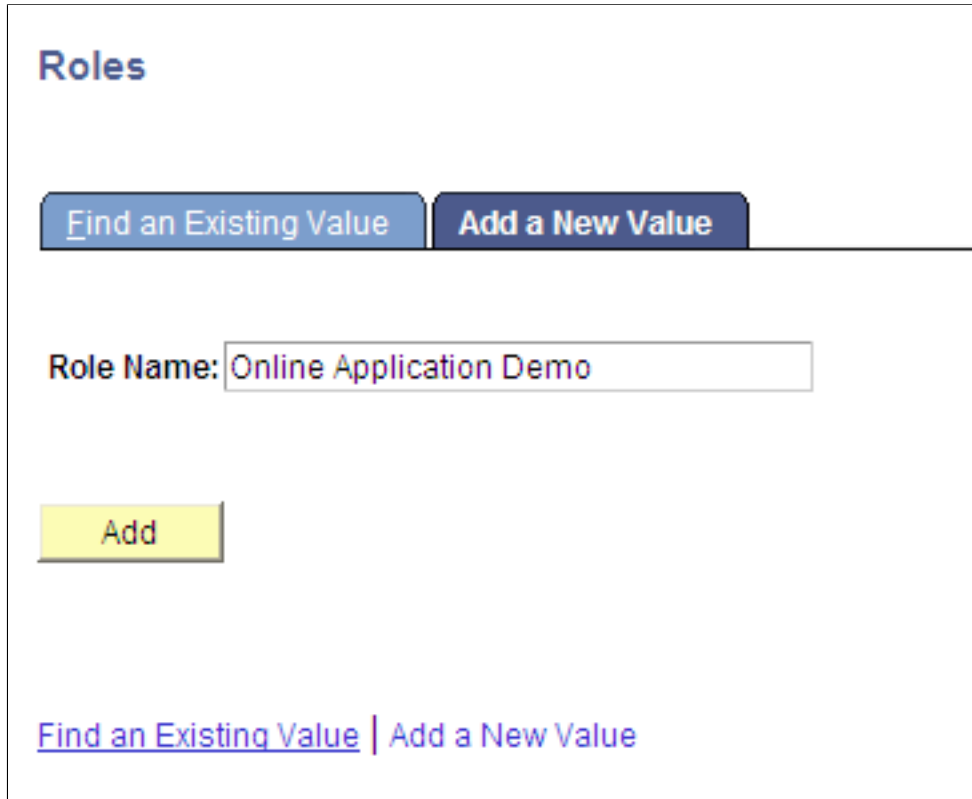
3. Click the **Search** button.
4. Verify whether a URL value (either a File Server or Database) has been supplied.

Step 2: Create New Roles

Procedure:

1. Access the Roles component (**PeopleTools >Security >Permissions & Roles >Roles**).
2. For *New User Registration*, see Campus Community's New User Registration Framework documentation for setup instructions on how to add role name *CS - NUR GateKeeper*.
3. For *SOLA*, complete the following steps:
 - a. Add role name as *Online Application Demo*:

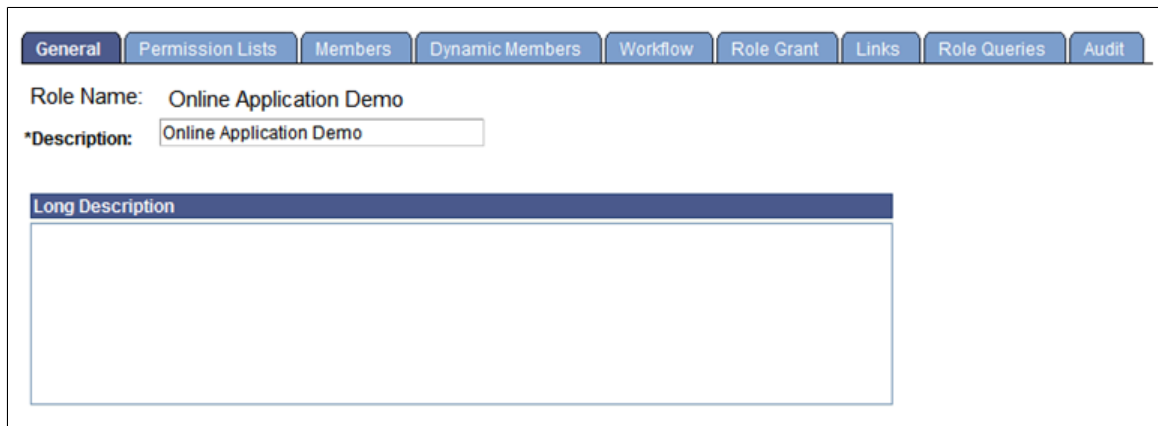
This is an example of adding a role for SOLA in the Roles component.



The screenshot shows the 'Roles' component interface. At the top, there is a header 'Roles'. Below it, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted. Below the buttons, there is a text input field labeled 'Role Name:' with the value 'Online Application Demo'. Below the input field, there is a yellow 'Add' button. At the bottom, there is a link 'Find an Existing Value | Add a New Value'.

- b. Click the **Add** button.
- c. Add the description as *Online Application Demo*:

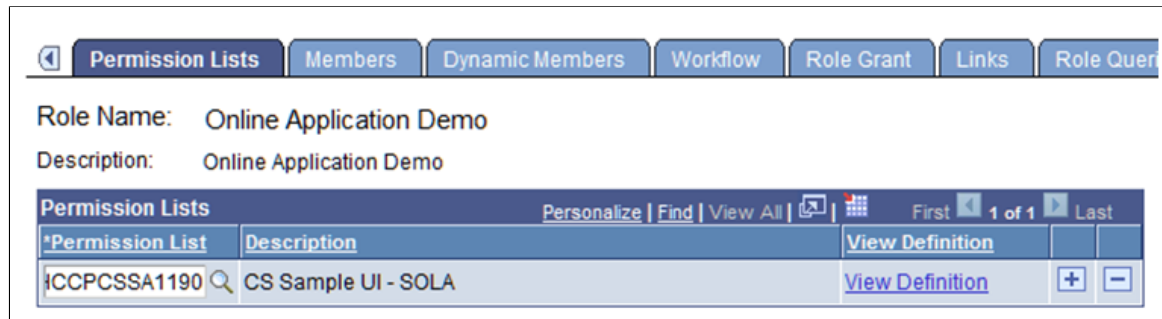
This is an example of adding a description for the SOLA role on the General page.



The screenshot shows the 'General' page interface. At the top, there is a tab bar with tabs: 'General', 'Permission Lists', 'Members', 'Dynamic Members', 'Workflow', 'Role Grant', 'Links', 'Role Queries', and 'Audit'. The 'General' tab is selected. Below the tab bar, there is a text input field labeled 'Role Name:' with the value 'Online Application Demo'. Below the 'Role Name' field, there is a text input field labeled '*Description:' with the value 'Online Application Demo'. Below the 'Description' field, there is a large text area labeled 'Long Description'.

- d. Add the permission list *HCCPCSSA1190*:

This is an example of adding a permission list for the SOLA role on the Permission Lists page.

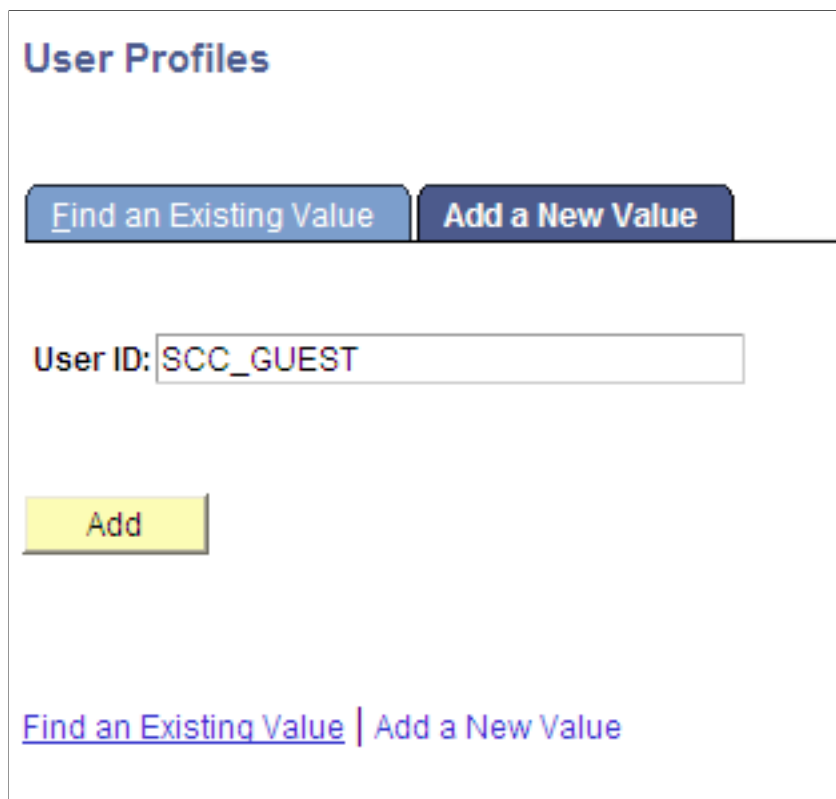


Step 3: Create New User Accounts

Procedure:

1. Access the User Profiles component (**PeopleTools >Security >User Profiles**).
2. Add *SCC_GUEST*.

This is example of adding the guest account in the User Profiles component.



3. On the General page, enter values as shown in the following graphic:

Note: For password, choose a password of your choice.

This example illustrates the values entered on the General page.

The screenshot shows the 'General' tab selected in the top navigation bar. The user ID is 'SCC_GUEST'. The 'Description' field is empty, and the 'Account Locked Out?' checkbox is unchecked. The 'Logon Information' section includes a 'Symbolic ID' dropdown set to 'SYSADM*', password fields with masked characters, and a 'Password Expired?' checkbox. The 'User ID Alias' field is empty. Below this are links for 'Edit Email Addresses' and 'Instant Messaging Information'. The 'General Attributes' section has a 'Language Code' dropdown set to 'English', a 'Currency Code' dropdown, and a 'Default Mobile Page' field. The 'Enable Expert Entry' checkbox is unchecked. The 'Permission Lists' section includes fields for 'Navigator Homepage', 'Primary', 'Process Profile', and 'Row Security', each with a search icon.

- On the ID page, enter values as shown in this graphic:

This example illustrates the values entered on the ID page.

The screenshot shows the 'ID' tab selected in the top navigation bar. The user ID is 'SCC_GUEST'. The 'Description' field is 'Campus Community Guest'. The 'ID Types and Values' section has a '*ID Type' dropdown set to 'None'. Below this is a table with columns 'Attribute Name', 'Attribute Value', and 'Description'. The 'User Description' section has a 'Description' field set to 'Campus Community Guest' and a link 'Set Description' with the text 'or type in User Description.'

- On the Roles page, enter values as shown in this graphic:

This example illustrates the values entered on the Roles page.

Role Name	Description	Dynamic	Route Control	View Definition
PeopleTools	PeopleTools	<input type="checkbox"/>	Route Control	View Definition
Standard Non-Page Permissions	Standard Non-Page Permissions	<input type="checkbox"/>	Route Control	View Definition

6. Save your changes.

Step 4: Set Up Integration Broker (IB)

Verify that minimal IB setup and service configuration is performed.

Verifying IB Gateway

Procedure:

1. Access the Gateways component (**PeopleTools >Integration Broker >Configuration >Gateways**).
2. Select that Integration Gateway ID for which the Local Gateway is set to *Y*.
3. Verify that the URL is pointing to the correct gateway.
4. Ensure that the gateway can be pinged by clicking the **Ping Gateway** button.

You should see this page if the gateway is pinged successfully.

PeopleSoft Integration Gateway

PeopleSoft Listening Connector
Tools Version : 8.51.03
Status: ACTIVE

Verifying IB Nodes

Procedure:

1. Access the Nodes component (**PeopleTools >Integration Broker >Integration Setup >Nodes**).

2. Click the **Search** button and scroll through the search results list looking for the Node Name where the Default Local Node is *Y*. There should be only one default local node.
3. On the Connectors page, click the **Ping Node** button.
4. Verify that the Gateway ID is pointing to the local gateway that you previously just pinged. If it is not, change the Gateway ID so that it is.
5. When you click the **Ping Node** button, you should see *Success* in the message text.

Verifying that the Domain Status is Active

Procedure:

1. Access the Domain Status page (**PeopleTools >Integration Broker >Service Operations Monitor >Administration >Domain Status**).
2. Verify that the domain status is *Active*.

Verifying Service Configuration

Procedure:

1. Access the Service Configuration page (**PeopleTools >Integration Broker >Configuration >Service Configuration**).
2. Verify that a service configuration exists.

Note

Do not continue if any of the verification steps mentioned in this section “Step 4: Set Up Integration Broker (IB)” fail. Resolve the failed steps before continuing.

Step 5: Configure Routings

Procedure:

1. Access the Services page (**PeopleTools >Integration Broker >Integration Setup >Services**).
2. Generate Any to Local and Local to Local routings for the following six web service operations of the SAD_ADMISSIONS web service:
 - SAD_CREATEAPPL.v1
 - SAD_GETAPPL.v1
 - SAD_GETAPPLS.v1
 - SAD_GETATTACH.v1
 - SAD_SAVEAPPL.v1
 - SAD_SUBMITAPPL.v1

This example illustrates the six service operations of SAD_ADMISSIONS service.

Services

Service SAD_ADMISSIONS ☐ REST Service Type

*Description Admissions Web Service

Comments Admissions Web Service

Service Alias

Owner ID Recruiting and Admissions

*Namespace http://xmlns.oracle.com/Enterprise/HCM/services

[Link Existing Operations](#)
[View WSDL](#)
[Provide Web Service](#)

Service Operations

Service Operation

Operation Type

Add

Existing Operations

Personalize | Find | View All |

First 1-6 of 6 Last

Operation Message Links

Operation.Default Version	Description	Active	Operation Type	
SAD_CREATEAPPL.v1	Create Application	<input checked="" type="checkbox"/>	Synch	
SAD_GETAPPL.v1	Get Application Operation	<input checked="" type="checkbox"/>	Synch	
SAD_GETAPPLS.v1	Get Applications Summary	<input checked="" type="checkbox"/>	Synch	
SAD_GETATTACH.v1	Get Applicant Attachment	<input checked="" type="checkbox"/>	Synch	
SAD_SAVEAPPL.v1	Save Application Operation	<input checked="" type="checkbox"/>	Synch	
SAD_SUBMITAPPL.v1	Submit Application Operation	<input checked="" type="checkbox"/>	Synch	

Save

To generate these routings and verify that the operation status is *Active*:

1. For each operation, on the General page select both the **Generate Any to Local** check box and the **Generate Local to Local** check box.
2. Make sure that the service operation is *Active*. If the status is not active, select the Active check box.
3. Save your changes. When you save, the system updates the routing status to *Exists* for both routing actions:

This example illustrates the fields and controls on the General page after save (1 of 2).

General Handlers Routings

Service Operation: SAD_CREATEAPPL

Operation Type: Synchronous

*Operation Description: Create Application

Operation Comments: Create Application

Owner ID: Recruiting and Admissions

Operation Alias:

☐ User/Password Required

*Req Verification: None

[Service Operation Security](#)

☐ Used with Think Time Methods

Default Service Operation Version

*Version: v1

Version Description: Create Application

Version Comments:

☐ Non-Repudiation

☐ Runtime Schema Validation

[Introspection](#)

[Delete Fault Type](#)

☒ Default ☒ Active

Routing Status

Any-to-Local:	Exists
Local-to-Local:	Exists

Routing Actions Upon Save

☐ Regenerate Any-to-Local

☐ Regenerate Local-to-Local

☐ Transactional

Warning: Regenerating sets all routing field values to their initial state.

This example illustrates the fields and controls on the General page after save (2 of 2).

Message Information

Type: Request

Message.Version: SAD_CREATEAPPL_REQ.V1 [View Message](#)

Type: Response

Message.Version: SAD_CREATEAPPL_RESP.V1 [View Message](#)

Type: Fault

Message.Version: SAD_FAULT_RESP.V1 [View Message](#)

[Save](#) [Return to Service](#) [Add Version](#)

4. Click the **Return to Service** link.
5. Repeat the steps 1 through 4 for the remaining operations.

For new user registration also you must perform the same steps:

1. Access the Services page (**PeopleTools >Integration Broker >Integration Setup >Services**).

2. Generate Any to Local and Local to Local routings for the following two web service operations of the SCC_USERREG web service:

- SCC_USERREG_AUTHENTICATE.v1
- SCC_USERREG_CREATEACCT.v1

This example illustrates the two service operations of SCC_USERREG service.

Services

Service **SCC_USERREG**
☐ REST Service Type

*Description

Comments

Service Alias

Owner ID

*Namespace

[Link Existing Operations](#)
[View WSDL](#)
[Provide Web Service](#)
[Generate SOAP Template](#)

Service Operations

Service Operation

Operation Type

Existing Operations

Personalize | Find | View All |
First 1-2 of 2 Last

Operation	Message Links	
Operation.Default Version	Description	Active
SCC_USERREG_AUTHENTICATE.v1	Authenticate a User	<input checked="" type="checkbox"/> Synch <input type="button" value="-"/>
SCC_USERREG_CREATEACCT.v1	Create Account	<input checked="" type="checkbox"/> Synch <input type="button" value="-"/>

3. Repeat the preceding steps for generating routings and ensuring that the status is *Active*.

Step 6: Set Up Integration Broker – ANONYMOUS Node

Procedure:

1. Access the Nodes component (**PeopleTools >Integration Broker >Integration Setup >Nodes**).
2. Search for the ANONYMOUS node name.
3. On the Node Definitions page, change the Default User ID to *SCC_GUEST*.

This example illustrates the fields and controls on the Node Definitions page.

The screenshot shows the 'Node Definitions' page with the following fields and controls:

- Node Name:** ANONYMOUS
- *Description:** Used internally by IB system.
- *Node Type:** External (dropdown menu)
- *Authentication Option:** None (dropdown menu)
- *Default User ID:** SCC_GUEST
- WSIL URL:** (text input)
- Hub Node:** (text input with search icon)
- Master Node:** (text input with search icon)
- Company ID:** (text input)
- IB Throttle Threshold:** (text input)
- Image Name:** (text input with search icon)
- Codeset Group Name:** (text input with search icon)
- External User ID:** (text input)
- External Password:** (text input)
- External Version:** (text input)

On the right side, there are three buttons: Copy Node, Rename Node, and Delete Node. Below the main form, there are three links: Save, Contact/Notes, and Properties.

- On the WS Security page, change the Authentication Token Type to *Username Token*.

This example illustrates the fields and controls on the WS Security page.

The screenshot shows a web application interface with a top navigation bar containing five tabs: **Node Definitions**, **Connectors**, **Portal**, **WS Security** (which is the active tab), and **Routings**. Below the tabs, the **Node Name** is displayed as **ANONYMOUS**. The main content area is titled **Authentication Token** and contains the following controls:

- A label ***Authentication Token Type** followed by a dropdown menu currently showing **Username Token**.
- Three unchecked checkboxes:
 - ☐ Encrypted
 - ☐ Digitally Signed
 - ☐ Use External User ID
- The text **(Password Optional)** is displayed below the checkboxes.
- A yellow **Save** button is located at the bottom left of the form area.

5. Save your changes.

Step 7: Publish Web Services

Procedure:

1. Access the Provide Web Service Wizard (**PeopleTools >Integration Broker >Web services >Provide Web Service**).
2. Ensure all the operations for the SAD_ADMISSIONS and SCC_USERREG web services are published.

Search for *SAD_ADMISSIONS* service name:

This example illustrates the fields and controls on the Select Services page.

Provide Web Service Wizard Step 1 of 4

1 2 3 4 Next >

Select Services

Enter search criteria and click Search. Select one or more services you would like to provide.

Search Criteria

Service Name: begins with SAD_ADMISSIONS

Description: begins with

Object owner identifier: equals

Search

Search Results Find | View All | First 1 of 1 Last

	Service	Description
<input checked="" type="checkbox"/>	SAD_ADMISSIONS	Admissions Web Service

☒ [Select All](#) ☐ [Clear All](#)

3. Click the **Select All** button and click the **Next** button.
4. On the Select Service Operations page, click the **Select All** button and click the **Next** button.

This example illustrates the fields and controls on the Select Service Operations page.

Provide Web Service Wizard Step 2 of 4

1 2 3 4 < Previous Next >

Select Service Operations

Select one or more operations for each service.

Service: SAD_ADMISSIONS Description: Admissions Web Service

☐ Use Service Alias in WSDL Service Alias:

☐ Use Secure Target Location

Operations Find | View All | First 1-5 of 6 Last

	Service Operation	Description	Operation Type	Request Message	Response Message	Fault Message
<input checked="" type="checkbox"/>	SAD_CREATEAPPL.v1	Create Application	Synchronous	SAD_CREATEAPPL_REQ.V1	SAD_CREATEAPPL_RESP.V1	SAD_FAULT_RESP.V1
<input checked="" type="checkbox"/>	SAD_GETAPPL.v1	Get Application Operation	Synchronous	SAD_GETAPPL_REQ.V1	SAD_GETAPPL_RESP.V1	SAD_FAULT_RESP.V1
<input checked="" type="checkbox"/>	SAD_GETAPPLS.v1	Get Applications Summary	Synchronous	SAD_GETAPPLS_REQ.V1	SAD_GETAPPLS_RESP.V1	SAD_FAULT_RESP.V1
<input checked="" type="checkbox"/>	SAD_GETATTACH.v1	Get Applicant Attachment	Synchronous	SAD_GETATTACH_REQ.V1	SAD_GETATTACH_RESP.V1	SAD_FAULT_RESP.V1
<input checked="" type="checkbox"/>	SAD_SAVEAPPL.v1	Save Application Operation	Synchronous	SAD_SAVEAPPL_REQ.V1	SAD_SAVEAPPL_RESP.V1	SAD_FAULT_RESP.V1

☒ [Select All](#) ☐ [Clear All](#)

5. On the View WSDL page, click the **Next** button.

This example illustrates the fields and controls on the View WSDL page.

Provide Web Service Wizard Step 3 of 4

1 2 3 4 < Previous Next >

View WSDL

View the generated WSDL for each service.

Selected Services		First 1 of 1 Last
Service	Description	
SAD_ADMISSIONS	Admissions Web Service	View WSDL

- On the Specify Publishing Options page, click the **Finish** button.

This example illustrates the fields and controls on the Specify Publishing Options page.

Provide Web Service Wizard Step 4 of 4

1 2 3 4 < Previous Finish

Specify Publishing Options

The WSDL for the selected services will be published to the PeopleSoft WSDL Repository. You can also publish the WSDLs to one or more UDDI Servers.

☐ Publish to UDDI

☒ WSDL Repository

- Repeat the steps for the SCC_USERREG web service.

Step 8: Refresh HCM Registry Cache

Procedure:

- Access the HCM Interface Registry page (**Set Up Common Objects >System Administration >HCM Registry >Service Registry**).

This example illustrates the fields and controls on the HCM Interface Registry page.

2. Click the **Refresh Cache** button.

Note: The message *Processing* displays and remains on the page. There is no other message displayed.

Step 9: Set Up New User Registration Tester

Procedure:

1. Access the New User Registration Context component (**Set Up SACR >System Administration >Utilities >New User Registration >New User Registration Context**).
2. Click the **Add a New Value** tab.
3. Add the *DEFAULT_CONTEXT* New User Registration Context as shown in this graphic:

This is an example of the New User Registration Context for SOLA.

New User Registration Context

New User Registration Context ID: SCC_NURCTXT_20120813224239

New User Registration Context: DEFAULT_CONTEXT

Description: Default Context for NUR transaction

Default: ☒

*Status: Active

*Provisioning Context: Auto Provisioned

Security to Provision				Personalize	Find	First	1-2 of 2	Last
	Role Name	Description	View Definition					
1	Online Application Demo	Online Application Demo	View Definition					
2	CS - Guest	CS - Guest	View Definition					

Target Page

URL:

Or:

Component Name: SAD_OLA_DEMO Sad Ola 3rdparty

Menu Name: SAD_OLA_MENU Admissions Sample Online App.

Menu Bar Name: USE Use

Item Name: SAD_OLA_DEMO Sample Online Application

Page Name: SAD_OLA_HOME Admissions Sample Online App.

Access Mode: Update

*Node Name: <YOUR DEFAULT LOCAL NODE> PS HRMS - Local Node

4. Select the **Default** check box.
5. In the **Node Name** field, you must select a node marked as Default Local Node = Y.
6. Save your changes.

Step 10: Verifying Your SOLA Setup

Procedure:

1. Sign into Campus Solutions using your institution's master user ID and password.

This is an example of signing into CS.

2. Access the New User Registration Tester page (**Set Up SACR >System Administration >Utilities >Sample User Interfaces >New User Registration Tester**).

This is an example of the New User Registration Tester page with sign-in fields.

3. Select the **Need a User ID? Yes/No** check box.
4. Fill out the New User Registration Tester page as shown in this figure:

This is an example of the New User Registration Tester page with the filled out user registration fields.

Note: For the password field, choose a password of our own.

- Click the **Create User** button. On clicking this button, the system transfers you to Sample Online Application home page:

This example illustrates the fields and controls on the blank Application Home page.

- Fill out the Create A New Application section. Select values for:

- Institution.
- Academic Career.
- Admit Term.
- Academic Program.
- Academic Plan.
- Admit Type.

This is an example of the Home page with the values for creating a new application.

Student Home Page

Current Applications

First 1 of 1 Last			
<u>Application Nbr</u>	<u>Institution</u>	<u>Academic Career</u>	<u>Status</u>

Create A New Application

<u>*Institution</u>	<u>*Academic Career</u>	<u>*Admit Term</u>	<u>*Academic Program</u>	<u>*Academic Plan</u>	<u>*Admit Type</u>
PSUNV	UGRD	0690	FAU	ART	FYR

Create Application

- Click the **Create Application** button.
- Change the value for the **Gender** field to *Female*.
- Save your changes. When you save, a message should be displayed indicating that the application was successfully saved:

This is an example of the message indicating that application has been saved.

The screenshot shows the 'Student Home Page' with a 'Current Applications' table and a 'Create A New Application' form. A 'Message' dialog box is overlaid on the right, displaying the text 'Application successfully saved. (0,0)' and an 'OK' button.

Application Nbr	Institution	Academic Career	Status	Options
00025708	PSUNV	UGRD	SAVED	Edit

Below the table is a 'Create A New Application' form with fields for *Institution, *Academic Career, *Admit Term, *Academic Program, *Academic Plan, and *Admit Type. A 'Create Application' button is at the bottom left.

10. Click OK and sign out.

11. Sign back in using the newly created ID (that is, JSmith):

This is an example of signing into CS using the ID created through New User Registration tester page.

The screenshot shows the Oracle PeopleSoft Enterprise login page. It features a 'User ID' field with 'JSmith' entered, a 'Password' field with masked characters, and a 'Sign In' button. Below the password field is a 'Set Trace Flags' link. To the right, under 'Select a Language:', there is a list of language links including English, Dansk, Français, Italiano, Nederlands, Polski, Suomi, Čeština, 한국어, ไทย, 繁體中文, UK English, Español, Deutsch, Français du Canada, Magyar, Norsk, Português, Svenska, 日本語, Русский, 简体中文, and العربية.

12. Access the Sample Online Application component (**Set Up SACR >System Administration >Utilities >Sample User Interfaces >Sample Online Application**).

This is an example of the Home page with the saved application.

Student Home Page

Current Applications

<u>Application Nbr</u>	<u>Institution</u>	<u>Academic Career</u>	<u>Status</u>	<u>Options</u>
00025708	PSUNV	UGRD	SAVED	Edit

Create A New Application

<u>*Institution</u>	<u>*Academic Career</u>	<u>*Admit Term</u>	<u>*Academic Program</u>	<u>*Academic Plan</u>	<u>*Admit Type</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Create Application](#)

13. Click the **Edit** button.

14. You should be able to see the application you started and the previously saved Gender change.

This is an example of the Basic Information page with the saved value.

Basic Information

Contact Information

Emergency Contact

Academics

Other

Submit

Basic Information

Legal First NameJane

Legal Middle Name

Legal Last NameSmith

Name Suffix

Preferred First Name

Date of Birth

Birth Country

Birth City

Birth State

GenderFemale

Citizenship Information

Country

Military Information

Military Status

Cancel

Save

Next Step

15. If you have made it this far, then the database is configured correctly for AAWS, SOLA, and New User Registration. If not, then verify that the preceding setup steps have been performed correctly.

Managing PeopleSoft Admission Transactions

Understanding Admission Transactions

Admission transactions use the delivered Admission Applications Web Services (AAWS) and the File Parser bulk loading of admission applications features. The features are fully integrated with the Constituent Transaction Management (CTM) framework (admission transactions are consumers of the CTM framework). Each admission transaction you set up is considered a CTM transaction. CTM generates an admission transaction when:

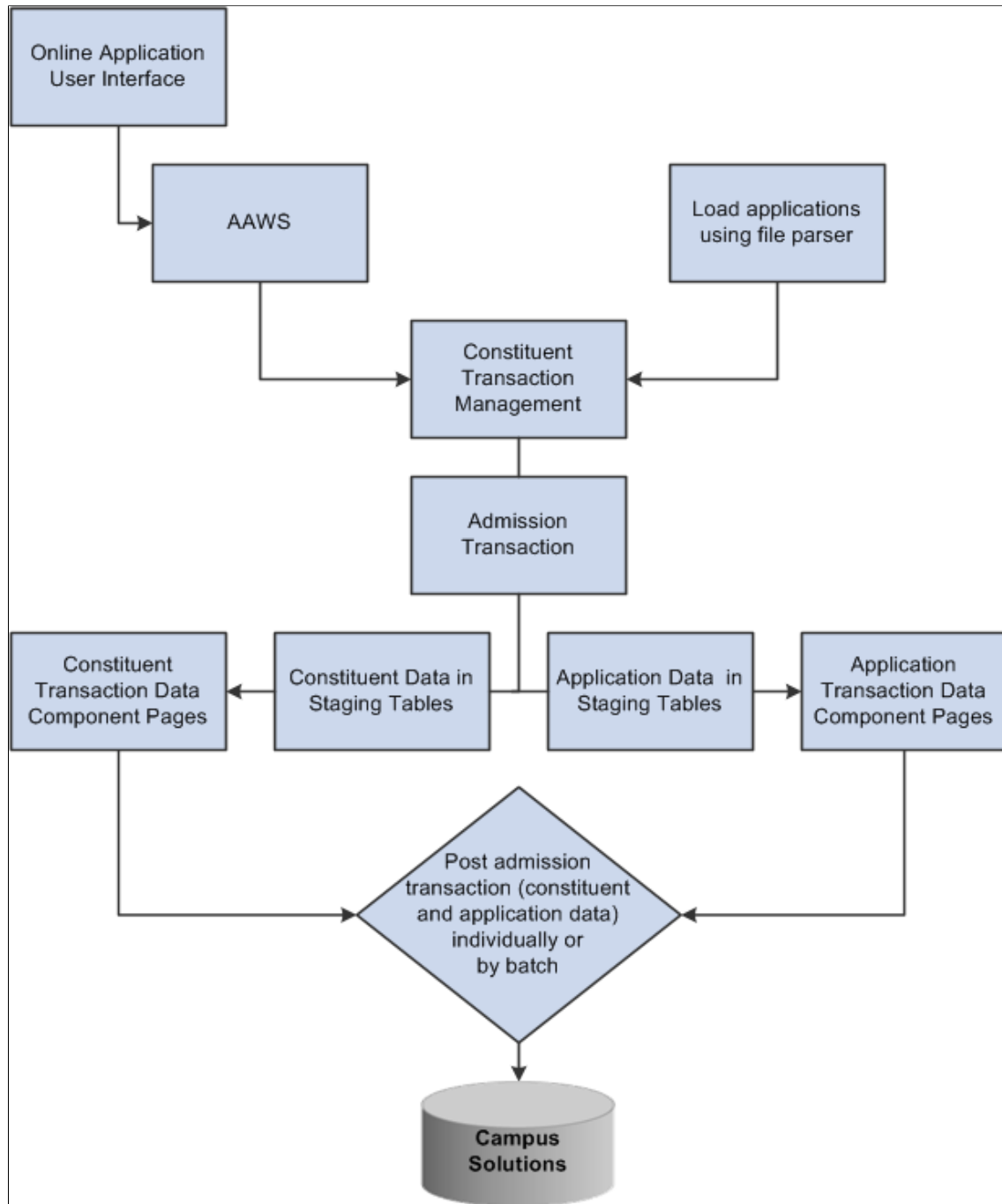
- An applicant or administrator uses an online admission application to create, save or submit an application through AAWS (online transaction).
- You use the File Parser utility to load applications from an external file (offline transaction).

An admissions online or offline transaction includes both the constituent and application data.

Constituent data may include person data or data that is considered as not associated with the application. Examples of constituent data include Name, Gender, Address, and Email. Examples of application data include Academic Program, Admit Term, and Academic History.

When a transaction is generated, the system uses Search/Match to look for constituent data in your production environment (based on the Search/Match parameters) that matches the constituent data in the transaction. Each defined transaction can have its own Search/Match setup. You can therefore determine the rules for creating a new ID, updating an existing ID, suspending or ignoring a record. The system stores the constituent and application data in staging tables. If there are errors or if Search/Match determines that the incoming constituent record should be suspended or ignored, use the Constituent Staging and Application Transactions components to correct the admissions transaction data. You can post transactions individually or by batch to the Campus Solutions database.

This diagram shows the admission transactions flow:



See Also

[Understanding AAWS](#)

[Setup for Loading Applications Using File Parser](#)

"Understanding the File Parser Process" (Campus Community Fundamentals)

"Understanding Entity Registry" (Campus Community Fundamentals)

"Understanding Get List of Values Web Service Operation" (Campus Community Fundamentals)

"Understanding CTM" (Campus Community Fundamentals)

PeoleTools Integration Broker documentation

CRM for Higher Ed EIPs and Admission Transactions

Enterprise Integration Points (EIPs) enable your institution to exchange data between CS and CRM. EIPs publish data either whenever data updating happens for the given entities of the EIPs or when the user requests data. This data can be created, updated, or deleted through various channels like components, component interfaces, and batch processes.

The system publishes the following EIPs when an application that is submitted through AAWS or File Parser process is posted:

- SAD_ADM_PRSPCT_DATA_SYNC
- SAD_ADM_APPL_DATA_SYNC
- SAD_TEST_SCORES_SYNC
- SAD_ADM_INTEREST_SYNC
- SSR_EXTRACUR_ACTVTY_SYNC
- SAD_EXT_ACAD_DATA_SYNC
- SCC_PERSON_SYNC

The system can publish SAD_ADM_PRSPCT_DATA_SYNC when the system creates a prospect record for a saved or posted application. You use the Prospect Setup page to indicate when (upon save or post) the system should create a prospect record.

For information about the Prospect Setup page, see [Setting Up Prospect Creation Rules and Defaults for Offline and Online Application Transactions](#)

See Also

"Understanding CRM for Higher Ed" (Campus Solutions Application Fundamentals)

CRM for Higher Education Developer's Guide in My Oracle Support (Doc ID 1982671.1)

Understanding Admission Transactions Setups

You define admission transactions using CTM pages. Then, you use the Application Configuration component to configure the admission transactions.

Setting Up CTM (Defining Transactions and Data Update Rules) and Configuring the Admission Transactions (Application Configuration component)

Before you deploy AAWS or start loading the applications, you must define the admission transactions through the CTM setup pages. For AAWS, define a transaction for the online application that a user saves or submits through the Save Application or Submit Application service operations. If you want to load admission applications using the PeopleSoft File Parser utility, define an offline transaction for the batch load.

The default transaction definition for AAWS that is delivered with the system is:
ADMISSIONS_APPLICATION (online application transaction).

Additionally, if you have defined an online transaction for the online application, consider using the New User Registration framework to allow a guest or a returning user to access your system. The framework delivers a sample login page that contains all the security objects delivered as part of the framework. The New User Registration framework is also a consumer of the CTM framework and delivered with your system is the CTM transaction code called NEW_USER_REGISTRATION. The New User Registration framework, using the New User Registration Context, can also transfer the newly authenticated user to the self-service page you created for your online application.

See "New User Registration and CTM" (Campus Community Fundamentals)

See "Understanding New User Registration" (Campus Community Fundamentals)

Warning! The ADMISSIONS_APPLICATION transaction is delivered only as a reference. It is not required that you use this transaction.

The following table lists the delivered transaction handler values for ADMISSIONS_APPLICATION. Do not change these values. Also use these values when defining a transaction handler for any new application transaction you may define.

Root Package ID	Path	Application Class ID
SCC_OLA	TRANSACTION	AdmissionTransaction

The staging record delivered with ADMISSIONS_APPLICATION is SAD_APL_DAT_STG. This record stores the transaction status and transaction status date value for ADMISSIONS_APPLICATION. Do not change this value. You should always use this value when defining any new application transaction you may define.

The following table lists the delivered Transaction Data Launch View settings for ADMISSIONS_APPLICATION transaction. You should always use these values when defining the transaction data launch view settings for any new application transaction you may create.

Menu Name	Menu Bar Name	Menu Item Name	Menu Page Name
Process Applications	Use	SAD_APPL_STG	SAD_APPL_STG

Academic institutions require different rules for updating constituent and application data based on a transaction and the affiliation the institution has with the constituent. For example, you may have a graduate online application rule where you want to update the constituent's home email address in your database with the value from a submitted graduate application. On the other hand, you may have a graduate application load rule where you do not want to update an existing home email address value when you use File Parser to load graduate applications into Campus Solutions. Additionally, you may want to override this graduate application load rule if the constituent is a prospect. The Data Update Rule Entry component allows this flexibility. The system uses these rules when it posts a transaction.

While you can use the same AAWS online user interface for all your academic careers and institutions, you can configure the admission transactions to behave differently. For AAWS and bulk load using File Parser, different admission transactions may have different Search/Match settings and data update rules. For instance, an academic institution might allow undergraduate applicants to update their passport details when submitting an online application. Conversely, the institution might not want to allow graduate applicants to update their passport details if that data is already on the system. You can associate the two different data update rules to these two separate transactions. Both these transactions may or may not have different Search/Match settings.

When establishing transactions, a single transaction for each institution and career combination could be defined in CTM. In this way, you can accommodate online applications for different careers (Examples: Undergraduate, Graduate, Graduation Business) which may have different Search/Match requirements, data update rules, or intended methods of processing. After defining the admission CTM transactions, use the Application Configuration component to set up different combinations of institutions and careers and map each institution-career combination to a defined admission transaction (CTM Transaction Code).

It is typical for administrators to enter the admissions application data for an applicant. It is possible for an administrator to use the same online application to do so, as long as the application user interface is constructed to distinguish between an administrator log in and a self service applicant log in.

Administrators can use a different institution-developed user interface designed for quick data entry. The same transaction value applied to the self service application is utilized for the institution/career combination for which the application is being created.

Use the Transaction Setup component to define a transaction, associate a data update rule with the transaction, and define the Search/Match setting for the transaction.

CTM Data Updates Rules Specific to Admission Transactions

To be consistent with existing processes that update this data, the application data update rules are as follows for the following entities:

Entity	Rules
Academic Interests	<p>If data exists on ADM_INTRST_HDR for an existing EMPLID and ACAD_CAREER and the max ADM_INTRST_HDR.EFFDT is not equal to %Date, a new row is inserted with EFFDT = %Date. Rows are inserted into ADM_INTERESTS for each academic interest populated on SCC_STG_ADMINT. PRIORITY is populated based on ADM_INTRST_HDR.USE_PRIORITY.</p> <p>If data exists on ADM_INTRST_HDR for an existing EMPLID and ACAD_CAREER and the max ADM_INTRST_HDR.EFFDT is equal to %Date, a row is not inserted into ADM_INTRST_HDR. Rows are inserted into ADM_INTERESTS only where SCC_STG_ADMINT.EXT_SUBJECT_AREA does not exist on ADM_INTERESTS for the current effective date. If ADM_INTRST_HDR.USE_PRIORITY is 'Y', the max ADM_INTEREST.PRIORITY is determined and incremented to the next number when new rows are inserted.</p>
External Academic Data	<p>A new Data Number (EXT_DATA_NBR) is inserted to EXT_ACAD_DATA if the EXT_ORG_ID on the staging record SCC_STG_ACADHST exists on the core record ACAD_HISTORY. The max EXT_DATA_NBR existing on EXT_ACAD_DATA is determined and incremented to the next number on insert.</p> <p>All child records are populated with the same EXT_DATA_NBR that is inserted on EXT_ACAD_DATA if the field exists on the child record.</p> <p>Exception: For the record EXT_DEGREE, if data exists on EXT_DEGREE where DESCR, DEGREE_DT, DEGREE_STATUS and LS_DATA_SOURCE = data from staging record (SCC_STG_EXTDEGR), a new row is not inserted.</p>
General Materials	<p>A new record is always inserted.</p> <p>The max GENL_MATL_NBR is determined and new incremented to the next number when new rows are inserted.</p>
Residency Official and Residency Appeal	<p>If the keys (INSTITUTION, ACAD_CAREER and EFFECTIVE_TERM) do not exist on RESIDENCY_OFF or RESIDENCY_APEAL, a new row is inserted.</p> <p>If the keys exist, a new row is not inserted and the data is not updated.</p>
Residency Self (Self Reported Residency)	<p>If Date Reported (SCC_STG_RES_SLF.SELF_REPORT_DT) does not exist on RESIDENCY_SELF, a new row is inserted.</p> <p>If Date Reported (SCC_STG_RES_SLF.SELF_REPORT_DT) exists, a new row is not inserted and the data is not updated.</p>

Entity	Rules
Test Score	<p>If SCC_STG_TEST.TEST_ID does not exist on STDNT_TEST for the EMPLID, a new row is inserted along with any child rows (STDNT_TEST_COMP).</p> <p>If the following elements on STDNT_TEST_COMP match the elements on the staging record SCC_STG_TESTCMP, update Score, Percentile and Date Loaded regardless of the previous score reported: EMPLID, TEST_ID, TEST_COMP, TEST_DT and DATA_SOURCE.</p> <p>If there is not an existing row on STDNT_TEST_COMP that matches on EMPLID, TEST_ID, TEST_COMP, TEST_DT, DATA_SOURCE, a new row is inserted.</p>

How the System Attaches an Application to a Defined Transaction

Applications typically vary among institutions and academic careers. Use the Appl Config page in the Application Configuration component to map an institution and career to a transaction. The system uses this mapping to identify which transaction definition to use when it receives an application through AAWS. For example, suppose you have defined two transactions: UG Transaction for undergraduate applications and Grad Transaction for graduate applications. When an applicant submits an undergraduate application, the system looks at the Appl Config page settings to determine that it needs to use the UG Transaction.

For offline transactions, you must enter the transaction code as a default value for the file mapping definition (Campus Community File Parser setup). The system uses this mapping to identify which transaction definition to use when it receives an application through the File Parser.

Understanding Staged Admission Transactions Processing

Use the Constituent Staging and Application Transactions components to review or edit the admissions transaction data stored in the staging tables. In addition, you can use these components to post the staged transactions into the production records of the Campus Solutions database.

A constituent in an admission transaction is the person record (applicant). Use the Constituent Staging component to handle the constituent data. The Constituent Staging component is a Campus Community CTM component. Use the Application Transactions component to handle the admissions application transaction data. To help you review the staged data using both the components for a particular Temporary ID, the components display a link that helps you navigate from one component to the other.

Correcting Admission Transaction Errors

An admission transaction might have an error status for the constituent (person) or the application record. For error indicators, use both the components to find the corresponding field and enter a valid value.

Use the Constituent Staging component to review and correct the constituent errors.

Use the Application Transactions component to review and correct the application errors.

Note: For File Parser, only after the CTM Transaction Management process runs, any errors appear in the components. In the case of AAWS, errors can appear either when the user saves or submits an admission application.

An example of an error message that the Application Transactions staging component displays: Suppose you selected the Manual Reconciliation option for Home Schools on the School Setup page. If the applicant has indicated that a school of attendance is a home school and submitted the application, the Application Transactions component displays an error message.

This example illustrates an error message in the Application Transactions component.

The screenshot displays the 'Application Transactions' staging component with the following sections:

- Application Data:**
 - Temporary ID: 79
 - User ID: SSADM215B
 - Created Datetime: 11/10/2011 10:52AM
 - Created By: SSADM215B
 - Name: Riley, Ramirez
 - Constituent Status: Error
 - ID: (empty)
 - Run Search/Match/Post button
 - Constituent Staging link
- Application Information:**
 - *Institution: PeopleSoft University
 - Academic Career: Undergraduate Engineering
 - Application Nbr: 00024910
 - Application Status Date: 11/10/2011
 - Application Status: Submitted
 - Expand All / Collapse All buttons
- Application Errors:**

Message Sequence	Message Set Number	Message Number	Error Description	Message Severity	Process Instance
1	1	14098	151 Reconcile error: Select a value for EXT_ORG_ID	Reconcile Error	3344
- Program Data:**
 - Program Number: 0
 - Exp. Graduation Term: (empty)
 - *Admit Term: 0680 2012 Spr
 - *Academic Load: Full-Time
 - *Academic Program: UENG Undergraduate Engineering
 - *Campus: MAIN Main
 - Last Updated On: 11/10/2011 10:52:12AM
 - Last Updated By: SSADM215B

To resolve such an error, you can click the Education History tab, then select the valid external organization ID for the home-schooled applicant and finally click the Save button.

Posting Admission Transactions

After you have reviewed a transaction and corrected the errors, you can run the search/match/post process from the components itself by clicking the **Run Search/Match/Post** button. On clicking this button, you can run both processes at once: to search for matching people in your database and to post the transaction according to the Search/Match parameters you set up on the Transaction Setup component. The latter happens if Search/Match identifies an ID that needs to be created or updated or if the applicant was a returning user and used a User ID already tied to an ID. In either way, the system uses the identified ID (EMPLID) to post the data. Alternatively, you can use the Constituent Staging and Application Transactions components to correct multiple transactions and then run the Transaction Management process to post the multiple transactions to the Campus Solutions database.

To process transactions in batch, use the Transaction Management process. If you had defined your admission transaction as either offline or online with the Process Search/Match option set to Batch, use

the Transaction Management batch process to process these transactions. However, if the system knows the EMPLID for the applicant, then the transaction is effectively treated as realtime. The Transaction Management Process component offers different options on how you can process one, all or only a certain set of transactions. For processing a certain set of transactions, Population Selection can be used.

Regardless of how the application is posted (manually or in batch), the system looks at the Prospect Setup page of the Application Configuration component to determine if a prospect should be created and if 3Cs should be inserted into the 3C Trigger Results table for the ID created or updated. In addition, the system determines if additional actions should be taken on the prospect record based on the Update Data check box in the From Application to Prospect section of the Installation Defaults - AD page. For more information on updating an existing prospect record:

See [Setting Up Admission Installation Defaults](#)

Entity Registry and Admission Transactions

You can add new entities or extend existing entities. For example, an academic institution has a requirement to add one or more new entities into the application process. The new entity could represent entirely new data or it could represent an extension to one of the existing delivered entity data types. This may involve either or both application and constituent data. You can use the Entity Registry feature for all these situations.

The web service operations that are part of the AAWS feature are constructed based on entities.

The entities for all core data records within the constituent and application areas needed for admission transactions are delivered with the system within the Entity Registry component. You can extend any of these entities or create new ones. Register new institution-specific extension entities as children to any entity in the registry. If you need to create new entities, because AAWS and File Parser admission transactions are CTM transactions and therefore use stage and production records, the entity you create must be set with an entity type that allows for stage records and production records. For instance, use entity type called Staged Entity. The stage and production records need to exist prior to creating the new entity.

All Recruiting and Admissions entities are represented by the IEntity interface SAD_ADM_APPL:Accessors:IEntity. The IEntity interface defines the core behavior that any participating entity needs to support in order to be managed by Recruiting and Admissions. For each new distinct entity that you want to create for Recruiting and Admissions, an application class implementing the IEntity interface needs to be created and registered. For instructions on creating and extending entities:

See "Creating a New Entity" (Campus Community Fundamentals)

Example of a scenario of when you can use the Entity Registry feature for Recruiting and Admissions: Suppose an online application has a list of questions. The Campus Solutions data structure does not support capturing the answers to these questions. In such a case, you can create a Questions and Answers entity.

The Questions and Answers application extension entity is registered as a child entity to the Application entity on the Entity Registry page:

This example illustrates the fields and controls on the Entity Registry page.

Entity Registry

Entity Configuration

Entity ID: SCC_ENTITY_20090521094345

Name:

Status:

Entity Type:

Description:

*AppClass:

Prod Record:

Stage Record:

Element (XML):

☐ Apply Data Update Rule

Children

Order	*Entity Name	Status	Embed	*Min	*Max	Element Wrapper (XML)	View		
1	Career Sequence	Active	<input type="checkbox"/>	0	0		View	+	-
2	Recruitment Category	Active	<input type="checkbox"/>	0	0		View	+	-
4	Student Response	Active	<input type="checkbox"/>	0	0	STDNT_RESPONSES	View	+	-
6	Application Fee Tender	Active	<input type="checkbox"/>	0	0		View	+	-
7	Application Attachment	Active	<input type="checkbox"/>	0	0		View	+	-
8	Q&A Application Extens	Active	<input type="checkbox"/>	0	0	EXTENSION_DATA	View	+	-
9	Application (NLD)	Active	<input type="checkbox"/>	0	0	APPLICATIONS_NLD	View	+	-

Delivered Entities Related to Admissions Data

The following entities are delivered for the application staging records and matching production records:

Entity Name	Staging Record Names	Production Record Names
Application	SAD_APL_DAT_STG	ADM_APPL_DATA
Career Sequence	SAD_APP_CSQ_STG	ADM_APP_CAR_SEQ

Entity Name	Staging Record Names	Production Record Names
Academic Program	SAD_APL_PRG_STG	ADM_APPL_PROG
Academic Plan	SAD_APL_PLN_STG	ADM_APPL_PLAN
Academic Sub-Plan	SAD_APL_SBP_STG	ADM_APPL_SBPLAN
Academic Program (AUS)	SAD_APPRGAU_STG	SAD_APL_PRG_AUS
Academic Program (NLD)	SAD_STDAPNL_STG	SAD_STD_APP_NLD
Academic Program (NZL)	SAD_PRGNZL_STG	SAD_APL_PRG_NZL
Student Education (NLD)	SAD_EDU_NLD_STG	SAD_STD_EDU_NLD
Recruitment Category	SAD_APL_RCC_STG	ADM_APPL_RCR_CA
Recruiter	SAD_APL_REC_STG	ADM_APPL_RCTER
Student Response	SAD_STG_STDRESP	STDNT_RESPONSE
Application Fee Tender	SAD_APL_TND_STG	ADM_APPL_TENDER
Application Attachment	SAD_APLATCH_STG	SAD_APPL_ATCH
Application (NLD)	SAD_APP_NLD_STG	SAD_APP_DAT_NLD
Q&A Application Extension (Example Only)	SCC_EXTN_STG	SCC_EXTN
Other Schools Applied	SAD_STG_OTH_SCH	SAD_OTHER_SCH
Source Of Interest	SAD_STG_SOI	SAD_SOI
Research Candidate	SSR_RS_CAND_STG	SSR_RS_CANDIDAT
Research Candidate Header	SSR_RS_CNDH_STG	SSR_RS_CAND_HDR
Research Consumption	SSR_RS_CNSP_STG	SSR_RS_CONSMPTN
Research Topic Header	SSR_RS_TPCH_STG	SSR_RS_TOPC_HDR

Entity Name	Staging Record Names	Production Record Names
Research Topic Detail	SSR_RS_TOPC_STG	SSR_RS_TOPIC
Research Topic Attachment	SSR_RS_TPAT_STG	SSR_RS_TOPC_ATT
Research Supervisor Header	SSR_RS_SUPH_STG	SSR_RS_SUPR_HDR
Research Supervisor	SSR_RS_SUPR_STG	SSR_RS_SUPRVSR
Research Supervisor Attachment	SSR_RS_SPAT_STG	SSR_RS_SUPR_ATT
Research Assignment Header	SSR_RS_OTRQ_STG	SSR_RS_OTHR_REQ
Research Assignment Detail	SSR_RS_OTRD_STG	SSR_RS_OTHRQDTL
Research Assignment Attachment	SSR_RS_OTAT_STG	SSR_RS_OTHR_ATT
Research Candidate Messages	SSR_RS_MSGS_STG	SSR_RS_MSGS
Research Candidate Attachment	SSR_RS_CDAT_STG	SSR_RS_CAND_ATT

Configuring Admission Transactions

To configure the admission transactions, use the Application Configuration component (SAD_ADM_APL_CONFIG).

This section discusses how to:

- Map online application transactions to academic careers.
- Set up application defaults for offline and online application transactions.
- Set up prospect creation rules and defaults for offline and online application transactions
- Set up home or unlisted schools for online application transactions.

Pages Used to Configure Admission Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Appl Config	SAD_TRANSAC_MAP	Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >Appl Config	Map online application transactions to academic careers.
Application Setup	SAD_APL_CNT	Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >Application Setup	Define how the system should assign an application center and optionally assign 3Cs to an application by defining which Event ID should be used in the processing. The system uses this setup when you use File Parser to load applications in batch via a calculated field or when the user saves or submits an application through AAWS.
Prospect Setup	SAD_PRS_SETUP	Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >Prospect Setup	Define how the system should create a prospect record, and if a prospect record is created, how to assign default values to the prospect record. The system uses this setup when you use File Parser to process applications in batch via a calculated field or when the user saves or submits an application through AAWS.
School Setup	SAD_AWS_SCH_DFL	Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >School Setup	Define how the system should process unlisted or home schools. The system uses this setup only when the user saves or submits an application through AAWS.

Mapping Online Application Transactions to Academic Careers

Access the Appl Config page (**Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >Appl Config**).

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

The screenshot shows the 'Appl Config' page with tabs for 'Application Setup', 'Prospect Setup', and 'School Setup'. The 'Academic Institution' is set to 'PSUNV PeopleSoft University'. The 'Transaction Mapping' table is displayed with the following data:

	*Academic Career	Description	*Transaction	Description		
1	BUSN	Graduate Business	PSUNV_BUSN_APPLICATION	PSUNV BUSN APPLICATION	+	-
2	GRAD	Graduate	ADM_CONSTITUENT1	ADM_CONSTITUENT1	+	-
3	LAW	Law	ADMISSIONS_APPLICATION	Application Data	+	-
4	MEDS	Medical School	PSUNV_MEDS_APPLICATION	PSUNV MEDS APPLICATION	+	-
5	UENG	Undergraduate Engineering	PSUNV_UENG_APPLICATION	PSUNV UENG APPLICATION	+	-
6	UGRD	Undergraduate	ADMISSIONS_APPLICATION	Application Data	+	-

You can enter only online transactions (except for the new user registration transaction NEW_USER_REGISTRATION) in the **Transaction** field. To check whether a transaction has been marked as online or offline, use the Transaction Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup).

Ensure that all academic careers for AAWS applications are mapped to a valid transaction on the Appl Config page.

When a user saves or submits an application through AAWS, the Campus Solutions system uses the Appl Config page to associate the application with a CTM online transaction. The system uses this association to run search/match and process the application data according to the settings on the Transaction Setup page.

Setting Up Application Defaults for Offline and Online Application Transactions

Access the Application Setup page (Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >Application Setup).

This example illustrates the fields and controls on the Application Setup page: Criteria tab (1 of 2). You can find definitions for the fields and controls later on this page.

Academic Institution: PSUNV PeopleSoft University

Application Setup

Criteria Assigned Values

	*Career	Description	Program	Description	Plan	Description	Country	Citizenship Status		
1	BUSN	Graduate Business							+	-
2	GRAD	Graduate							+	-
3	GRAD	Graduate					CAN	Canadian Citize	+	-
4	GRAD	Graduate					USA	Native	+	-
5	GRAD	Graduate					USA	Alien Permaner	+	-
6	GRAD	Graduate					USA	Permanent Res	+	-
7	GRAD	Graduate					USA	Canadian Citize	+	-
8	LAW	Law							+	-
9	MEDS	Medical School							+	-
10	UENG	Undergraduate Engineering							+	-

This example illustrates the fields and controls on the Application Setup page: Criteria tab (2 of 2). You can find definitions for the fields and controls later on this page.

11	UGRD	Undergraduate							+	-
12	UGRD	Undergraduate	AA	Associate of Arts	COMPSCI	Computer Science			+	-
13	UGRD	Undergraduate	AA	Associate of Arts	MUSIC	Music Performance (BFA)			+	-
14	UGRD	Undergraduate	FAU	Fine Arts Undergraduate					+	-
15	UGRD	Undergraduate	FAU	Fine Arts Undergraduate	DANCE	Dance (BFA)			+	-
16	UGRD	Undergraduate	FAU	Fine Arts Undergraduate	MUSIC	Music Performance (BFA)			+	-
17	UGRD	Undergraduate	LAU	Liberal Arts Undergraduate					+	-
18	UGRD	Undergraduate	LAU	Liberal Arts Undergraduate	PSYCH	Psychology			+	-

This example illustrates the fields and controls on the Application Setup page: Assigned Values tab (1 of 2). You can find definitions for the fields and controls later on this page.

	*Application Center	Description	Event ID	Description		
1	BUSN	Business School			+	-
2	APP3	Application Center 3			+	-
3	APP2	Application Center 2			+	-
4	GRAD	Graduate Admissions			+	-
5	GRAD	Graduate Admissions			+	-
6	APP2	Application Center 2			+	-
7	GRAD	Graduate Admissions			+	-
8	LAW	Law School			+	-
9	MEDS	Medical School			+	-
10	UENG	Undergraduate Engineering			+	-

This example illustrates the fields and controls on the Application Setup page: Assigned Values tab (2 of 2). You can find definitions for the fields and controls later on this page.

11	UGRD	Undergraduate	AD_ADMA	Admissions ADMA	+	-
12	APP3	Application Center 3			+	-
13	APP2	Application Center 2			+	-
14	APP1	Application Center 1			+	-
15	APP2	Application Center 2			+	-
16	APP3	Application Center 3			+	-
17	APP1	Application Center 1	AD_ADMP	Admissions ADMP	+	-
18	APP2	Application Center 2			+	-

Ensure that all the academic career, program, and plan combinations for AAWS and File Parser applications are mapped to a valid application center on the Application Setup page.

Use the Criteria tab to define the selecting criteria — such as academic career, academic program, and academic plan — that constitutes a particular group of applications. Use the Assigned Values tab to define the application center and event ID that the system assigns to the particular application group. When the system receives an online application, it uses this mapping to determine which application center and event ID should be assigned to an application. For batch applications loaded through File Parser, a calculated field can be built on the File Mapping Definition to look at this setup to determine the application center to populate.

In the exhibit example — Application Setup page: Criteria tab (2 of 2) — you can see that for row 13, career is UGRD, program is AA and plan is Music. For the same row, in the exhibit example — Application Setup page: Assigned Values tab (2 of 2) — the application center is APP2. Assume that the system receives an application for a career of UGRD, program of AA, and plan of Music through AAWS or batch load. In such a case, the system assigns APP2 to this application.

The system requires an application center to create an admission application. Therefore, you must map each career with an application center on the Application Setup page. The system generates an error message if it receives an application through AAWS or batch load and it does not find the corresponding application center from this mapping. You can view this error message on the Application Transactions staging component. Note that the system assigns an application center from this mapping when an application is saved or submitted. The system assigns the 3C Event ID when an application is posted.

Note: You should complete this mapping for only Self-Service (applicant) mode. In the Administrator mode, the user provides the application center when creating an admission application. Therefore, this setup is not relevant for Administrator mode.

Criteria

<i>Field or Control</i>	<i>Description</i>
Career	Enter the Career for which you want to assign an Application Center (and optionally, an Event ID).
Program	<p>Optionally, enter the Program for which you want to assign an Application Center (and optionally, an Event ID).</p> <p>If you leave this field blank, the system assigns the Application Center to all the Programs within the Career. For example, suppose you have two Application Centers: APP01 and APP02. Map the Career GRAD and Program MBA combination to the APP01 Application Center and map the GRAD Career to the APP02 Application Center. In such a case, the system assigns APP01 Application Center to an MBA application and assigns APP02 to other non MBA applications such as a MS or MA application.</p>
Plan	<p>Optionally, if you have entered a program, enter the Plan for which you want to assign an Application Center (and optionally, an Event ID).</p> <p>If you leave this field blank, the system assigns the Application Center to all the Plans within the program. For example, suppose you have two Application Centers: APP03 and APP04. Map the Career GRAD, Program MS, and Plan Finance combination to the APP03 Application Center and map the GRAD Career and MS Program to APP04 Application Center. In such a case, the system assigns APP03 Application Center to an MS Finance application and assigns APP04 to other Master of Science applications such as MS in Biochemistry or MS in Physics.</p>

Field or Control	Description
Country and Citizenship Status	<p>Enter the Country and Citizenship Status if you want to assign an Application Center (and optionally, an Event ID) based on the applicant's citizenship. For example, you could have the Career UGRD, Country USA, and Citizenship Status Alien Temporary mapped to an Undergrad International Office Application Center and GRAD, USA, and Alien Temporary mapped to a Graduate International Office Application Center.</p> <hr/> <p>Note: If you enter a value in one of the two fields, you cannot leave the other field blank. For example, if you enter a Country, you must specify the Citizenship Status.</p> <hr/>

Note: When determining the **Application Center** assignment, the system uses the following order: **Citizenship Status**, **Plan**, **Program**, and **Career**.

Assigned Values

Enter the **Plan**, and optionally the **Event ID**, for the row entered on the Criteria tab.

Only the **Event IDs** that have the administrative functions ADMA (admissions application) and ADMP (admissions program) are available. ADMP is available only if you select an academic **Program** on the Criteria tab. Define **Event IDs** on the Event Definition page.

"Defining 3C Engine Events" (Campus Community Fundamentals)

Setting Up Prospect Creation Rules and Defaults for Offline and Online Application Transactions

Access the Prospect Setup page (Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >Prospect Setup).

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

Appl Config Application Setup **Prospect Setup** School Setup

Academic Institution PSUNV PeopleSoft University

Prospect Mapping Customize Find View All First 1-8 of 8 Last

Criteria Assigned Values

	Career	Description	Program	Description	Plan	Description	Create Prospect		
1	MEDS	Medical School	MED	Medicine			Save	+	-
2	MEDS	Medical School	MED	Medicine	MEDICIN	Medicine	Save	+	-
3	MEDS	Medical School	MED	Medicine	PHARM	Pharmacology	Save	+	-
4	UENG	Undergraduate Engineering	UENG	Undergraduate Engineering			Save	+	-
5	UENG	Undergraduate Engineering	UENG	Undergraduate Engineering	ENG-CH	Chemical Engineering (BE)	Save	+	-
6	UENG	Undergraduate Engineering	UENG	Undergraduate Engineering	ENGINE	Engineering Undeclared	Save	+	-
7	UGRD	Undergraduate					Post	+	-
8	UGRD	Undergraduate					Save	+	-

This example illustrates the fields and controls on the Prospect Setup page: Assigned Values tab. You can find definitions for the fields and controls later on this page.

Appl Config Application Setup **Prospect Setup** School Setup

Academic Institution PSUNV PeopleSoft University

Prospect Mapping Customize Find View All First 1-8 of 8 Last

Criteria Assigned Values

	Recruiting Center	Description	Recruiting Status	Referral Source	Description	Event ID	Description		
1	MEDS	Medical School	Applicar	QFRM	Graduate Forum	AD_PR	Admissions PROP	+	-
2	MMED	Medical School - Medicine Prog	Pre-App	INQ	Student Inquiry			+	-
3	MPHA	Medical School - Pharmacy Prog	Prosper	WWW	World Wide Web	NEWPI	New Prospect - PROS	+	-
4	UENG	Undergraduate Engineering	Applicar	APPL	Application	AD_PR	Admissions PROS	+	-
5	UENG	Undergraduate Engineering	Applicar	APPL	Application	NEWPI	New Prospect - PROS	+	-
6	UENG	Undergraduate Engineering	Applicar	APPL	Application	NEWPI	New Prospect - PROP	+	-
7	UGRD	Undergraduate	Applicar	APPL	Application			+	-
8	UGRD	Undergraduate	Pre-App	APPL	Application			+	-

Use the Criteria tab to specify whether you want the system to create a prospect when the user saves an application through AAWS or when you post an application to the Campus Solutions database. Also, on this tab define the criteria for creating the prospect. Use the Assigned Values tab to specify the default values that the system assigns to the prospect. You must specify the **Recruiting Center**, **Recruiting Status**, and **Referral Source** values.

In the exhibit example — Prospect Setup page: Criteria tab — you can see that for row 3, career is MEDS, program is MED, plan is Pharmacology and Create Prospect value is SAVE. For the same row, in the exhibit example — Prospect Setup page: Assigned Values tab — values such as the recruiting

center MPHA is assigned. Assume that a user saves a pharmacology application through AAWS. In such a case, the system creates a prospect record for the applicant and also assigns the default values such as the recruiting center MPHA to this newly created prospect record.

This is an optional setup. If you do not want to create a prospect record, when the application is saved or posted, leave the Prospect Setup page blank.

Note: To create prospect on save, the online application must ensure that the required constituent data is collected before the user saves the application. Also, ensure that the related transaction is set to run real time on save. If the related transaction is set to run on submit, then the Prospect Setup page displays a warning message if you choose the Save option for Create Prospect. For example, suppose you have a transaction UGRD_online_app and you have mapped this transaction to the UGRD career and GLAKE institution on Appl Config page. You have not selected the Run on Save check box on the Transaction Setup page for this transaction. In such a case, the Prospect Setup page displays a warning message if you select the Save option for the UGRD and GLAKE criteria. If the prospect setup is set to create a prospect on Save, but the transaction is not set to run real time on Save, you can still create the prospect record by running the Transaction Management process for Saved transactions.

Criteria

Field or Control	Description
Career	Enter the career for which you want to create prospect records and assign default values.
Program	<p>Optionally, if you have entered a program, enter the plan for which you want to create prospect records and assign default values.</p> <p>If you leave this field blank, the prospect records are created for all the plans within the program or career.</p>
Create Prospect	<p>Identify how you want to create prospect records for the career (and program and/or plan, if applicable):</p> <ul style="list-style-type: none"> • <i>Save</i> – Select if you want the system to create a prospect record when it receives a Save Application service operation request or when the applications are loaded into the staging tables using File Parser and have a transaction status of Saved. • <i>Post</i> – Select if you want the system to create a prospect record when the online or offline transactions are posted to the Campus Solutions database.

If the prospect record already exists for the institution and career of the transaction, the system updates the prospect record to insert program and plan data that does not exist, and also inserts Housing Interest, Financial Aid Interest, Last School Attended and Graduation Date if not previously populated. If you have selected the Update Data check box in the From Application to Prospect section of the Installation

Defaults - AD page, the system populates the Application Number and updates the Applied indicator for the existing prospect record. For more information on this check box:

Setting Up Admission Installation Defaults

Note: If you want to create prospects for all applications received for the criteria entered, enter a row for Save and a row for Post. This ensures that the system creates a prospect record when an application is not saved prior to submission.

Assigned Values

Enter the recruiting center, recruiting status, referral source and optionally the event ID, for the row entered on the Criteria tab.

Only the event IDs that have the administrative functions PROS (prospect) and PROP (prospect program) are available. PROP is available only if you select an academic program on the Criteria tab. Define event IDs on the Event Definition page.

Setting Up Home or Unlisted Schools for Online Application Transactions

Access the School Setup page (**Set Up SACR >Product Related >Recruiting and Admissions >Application Configuration >Application Configuration >School Setup**).

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

The screenshot shows the 'School Setup' page in PeopleSoft. At the top, there are tabs for 'Appl Config', 'Application Setup', 'Prospect Setup', and 'School Setup'. The 'School Setup' tab is selected. Below the tabs, the 'Academic Institution' is set to 'PSUNV' (PeopleSoft University). The main section is titled 'Configure Unlisted / Home School' and includes a search bar with the text 'PSUNV_BUSN_APPLICATION'. Below this, there are two sections: 'Unlisted School' and 'Home School'. The 'Unlisted School' section has a description 'Select the processing option for applicants with schools not found in the organization list' and two radio buttons: 'Post Application Using Default' (selected) and 'Require Manual Reconciliation'. The 'Home School' section has a description 'Select the processing option for applicants who indicate they are home schooled' and two radio buttons: 'Post Application Using Default' (selected) and 'Require Manual Reconciliation'. A 'Default Organization' field shows 'ADM00000002' and 'Unlisted School - Generic'.

An online application may need to capture the applicant's academic history. The online application may present a field with a list of schools, colleges, and universities that exist in the system's External Organization table and the user may select a value from this list. However, two applicant categories exist, those who have attended an academic institution that is not listed in the list of values (unlisted schools) and those who are home schooled. The online application may present a text field or some other method

to capture the home or unlisted school details. Use the School Setup page if you want to define how the system should process these unlisted or home schools.

Unlisted Schools

<i>Field or Control</i>	<i>Description</i>
Post Application Using Default	Select if you want to specify a default organization ID for unlisted schools or if the applicant has not provided the school name.

<i>Field or Control</i>	<i>Description</i>
Default Organization	<p>This field appears if you select the Post Application Using Default option. Specify the default organization ID to post with the application record.</p> <hr/> <p>Note: If the application contains multiple rows of Unlisted School data, the default applies to the first processed row. Because External Organization ID is a key field, it is not possible to use the default more than once. In the event of multiple Unlisted Schools, the web service creates a reconciliation error in the staging component and requires manual reconciliation of the additional Unlisted School rows.</p> <hr/>
Require Manual Reconciliation	<p>Select if you want to manually correct an application that has an unlisted school or no school.</p> <p>If you select this option and the application transaction has an unlisted school or no school, the system retains the transaction in the staging table with a constituent status of Error. You have to resolve the error message, and then post the application. You can use the Application Transactions component to select an appropriate External Org ID and run the post process. Refer to the “Reviewing and Editing Staged Admission Application Transactions” section for more information about this component.</p> <p>See Reviewing and Editing Staged Admission Application Transactions</p>

Home School

Field or Control	Description
Post Application Using Default	Select if you want to specify a default organization ID for home schools.
Default Organization	<p>This field appears if you select the Post Application Using Default option. Specify the default organization ID to post with the application record.</p> <hr/> <p>Note: If the application contains multiple rows of Home School data, the default applies to the first processed row. Because External Organization ID is a key field, it is not possible to use the default more than once. In the event of multiple Home Schools, the web service creates a reconciliation error in the staging component, requiring manual reconciliation of the additional Home School rows.</p> <hr/>
Require Manual Reconciliation	<p>Select if you want to manually correct an application that has a home school.</p> <p>If you select this option and if the applicant has mentioned home school, the system retains the transaction in the staging table with a constituent status of Error. You have to resolve the error message and then post the application. You can use the Application Transactions component to select an appropriate External Org ID and run the post process. Refer to the “Reviewing and Editing Staged Admission Application Transactions” section for more information on about component.</p> <p><u>Reviewing and Editing Staged Admission Application Transactions</u></p>

Reviewing and Editing Staged Admission Application Transactions

To review and edit the admission application transactions, use the Application Transactions component (SAD_APPL_STG).

This section discusses:

- Impact of application center security on navigation.
- Header on the Application Transactions pages.
- Reviewing application data and error messages.

- Reviewing additional information.
- Reviewing applicant's education history.
- Reviewing additional academic information.
- Reviewing general materials and attachments.
- Reviewing application regional information.

Pages Used to Review and Edit Staged Admission Application Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Data	SAD_APPL_STG	<ul style="list-style-type: none"> • Student Admissions >Application Transaction Mgmt >Application Transactions >Application Data • Click the <Transaction Name> link on the Summary Information page of the Constituent Staging component. 	<p>Review the error messages pertaining to the application in the staging record.</p> <p>In addition, review and edit the application program data and academic plan data. You can also review and edit the additional information regarding the application, such as application center, application fees, source of interest, other institutions, and recruiter assigned to the application.</p>
Additional Information	SAD_APPL_CAF_STG	<ul style="list-style-type: none"> • Student Admissions >Application Transaction Mgmt >Application Transactions >Additional Information • Click the <Transaction Name> link on the Summary Information page and then click the Additional Information tab. 	<p>Review common attributes for program, plan and subplan pertaining to the application in the staging record.</p>
Education History	SCC_EXT_ACAD_DATA	<ul style="list-style-type: none"> • Student Admissions >Application Transaction Mgmt >Application Transactions >Education History • Click the <Transaction Name> link on the Summary Information page and then click the Education History tab. 	<p>Review and edit the education history pertaining to the application in the staging record. Education history includes information such as schools attended and degrees that are in progress or completed.</p>

Page Name	Definition Name	Navigation	Usage
Additional Academic Info	SAD_STG_TEST	<ul style="list-style-type: none"> • Student Admissions >Application Transaction Mgmt >Application Transactions >Additional Academic Info • Click the <Transaction Name> link on the Summary Information page and then click the Additional Academic Info tab. 	Review and edit the additional academic information pertaining to the application in the staging record. Additional academic information includes test results and academic interests.
Supplemental Information	SAD_GENM_ATTACH	<ul style="list-style-type: none"> • Student Admissions >Application Transaction Mgmt >Application Transactions >Supplemental Information • Click the <Transaction Name> link on the Summary Information page and then click the Supplemental Information tab. 	Review and edit the supplemental information pertaining to the application in the staging record. Supplemental information includes general materials, general material attachments, and application file attachments.
Candidature Details	SSR_RS_CNDDTRE_STG	<ul style="list-style-type: none"> • Student Admissions >Application Transaction Mgmt >Application Transactions >Candidature Details • Click the <Transaction Name> link on the Summary Information page and then click the Candidature Details tab. 	Review and edit the Candidate Management data pertaining to the application in the staging record.
Application Regional	SAD_APL_REG_STG	<ul style="list-style-type: none"> • Student Admissions >Application Transaction Mgmt >Application Transactions >Application Regional • Click the<Transaction Name> link on the Summary Information page and then click the Application Regional tab. 	Review and edit the country-specific data pertaining to the application in the staging record.

Impact of Application Center Security on Navigation

One of the methods to navigate to the Application Transactions component is by clicking the <transaction name> link on the Constituent Staging component. There are two ways to access the Constituent Staging component:

- Campus Community menu path navigation (**Campus Community >Constituent Transaction Mgmt >Constituent Staging**)
- Student Admissions menu path navigation (**Student Admissions >Application Transaction Mgmt >Constituent Staging**)

If you use the Campus Community menu path navigation and if your user ID is not associated with a particular application center, you cannot access the application data associated with that application center.

However, you can see how many applications exist for an applicant. In the following example, a user can see there is one application for the constituent. However, the user cannot view the application data because the <Transaction Name> link is disabled. The system has disabled the link because the user does not have access to the application center.

This example illustrates a disabled Application Data link on the Summary Information page of Constituent Staging component for a user who does not have application center access.

The screenshot displays the 'Summary Information' tab of the Constituent Staging component. The constituent's details include a Temporary ID of 20, Name Moore, KJ, User ID, and Status New ID Created. The Created Datetime is 11/04/2011 3:50PM and the ID is 0065. A 'Post Transaction Data' button is visible. The 'Related Transactions' table lists one transaction: 'AAWS File Parser' with Transaction Code 'AAWS_FP_ADMAPLS' and Status 'Posted'. The 'Transaction Name' link is disabled. The bottom of the page features a navigation bar with buttons for Save, Return to Search, Previous in List, Next in List, Notify, and Refresh.

If you use the Student Admissions menu path navigation and if your user ID is not associated with a particular application center, you cannot see how many applications associated with the application center exist. Also, you cannot view the application data associated with the application center. Therefore, the system strictly enforces the application center security for Student Admissions menu as compared to Campus Community menu where the security is not enforced. In the following example, a user cannot see whether there is an application transaction for the constituent because the user does not have access to the application center.

This example illustrates hidden search results on Constituent Staging component for a user who does not have the application center access.

Menu

- Student Admissions
 - Application Entry
 - Application Maintenance
 - Application Evaluation
 - Processing Applications
 - Application Delete
 - Applicant Summaries
 - 3 C's and Event Summaries
 - External Org Summaries
 - Application Fees and Deposits
 - Enrollment Targets
 - External Test Score Processing
 - Application/Transcript Loss
 - OUAC
 - Reports
 - Educational Contracts NLD
 - Base Register NLD
 - Internship Contracts NLD
 - Processing Admissions NLD
 - CFI Snapshot NLD
 - Processing Admissions NZL
 - TAC Processing
 - Processing Studieline NLD
 - UCAS Processing
 - Application Transaction Mgmt
 - Application Transaction
 - Constituent Staging**
 - Transaction Management

Constituent Staging

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Temporary ID: = 20

Transaction: begins with

Created Date: =

Constituent Status: =

Last Name: begins with

First Name: begins with

Empl ID: begins with

User ID: begins with

☐ Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

No matching values were found.

See "Setting Security for Application Centers" (Campus Solutions Application Fundamentals)

Header on the Application Transactions Pages

The header region on all the pages of the Application Transactions component is similar to the header region on the Constituent Staging component pages. This region includes options to modify the constituent status, run Search/Match/Post process or post a transaction.

This example illustrates a header region on an Application Transactions component page.

Application Data **Education History** **Additional Academic Info** **Supplemental Information**

Temporary ID: 56

User ID: PS

Created Datetime: 11/09/2011 10:12AM

Created By: PS

Name: SmithPRF, JohnPRF

Constituent Status: Add New ID

ID:

Run Search/Match/Post

[Constituent Staging](#)

Field or Control	Description
Constituent Staging	Click this link to access the Constituent Staging component that contains all the pertinent person information.

Reviewing Application Data and Error Messages

Access the Application Data page (**Student Admissions >Application Transaction Mgmt >Application Transactions >Application Data**).

This example illustrates the fields and controls on the Application Data page (1 of 3). You can find definitions for the fields and controls later on this page.

Application Data	Additional Information	Education History	Additional Academic Info	Supplemental Information
<div> <div>Temporary ID: 3</div> <div>Name: Jamison, Susan</div> <div>User ID:</div> <div>Constituent Status: Ignore</div> <div>Created Datetime: 20/06/2011 9:14AM</div> <div>ID:</div> <div>Created By:</div> <div>Run Search/Match/Post</div> <div>Constituent Staging</div> </div>				
<div> <div>*Institution: PeopleSoft University</div> <div>Academic Career: Undergraduate</div> <div>Application Nbr: 00024795</div> <div>Application Status Date: 20/06/2011</div> <div>Application Status: Submitted</div> <div>Expand All</div> <div>Collapse All</div> </div>				
<div> <div>Program Data</div> <div>Find View All</div> <div>First 1 of 2 Last</div> <div> <div>Program Number: 1</div> <div>Exp. Graduation Term:</div> <div>*Admit Term: 0670 2011 Fall</div> <div>*Academic Load: Full-Time</div> <div>*Academic Program: LAU Liberal Arts Undergraduate</div> <div>*Campus: MAIN Main</div> <div>Academic Shift:</div> </div> </div>				
<div> <div>Program Enrollment</div> <div> <div>Cohort Tag:</div> <div>APT Instance:</div> <div>Year of Program: 1st Year</div> </div> </div>				
<div> <div>Last Updated On: 20/06/2011 9:14:34AM</div> <div>Last Updated By: SAMPLE</div> </div>				
<div> <div>Plan Data</div> <div>Find View All</div> <div>First 1 of 1 Last</div> <div> <div>*Academic Plan: BIOLBS Biology (BS)</div> <div>*Plan Sequence: 1</div> <div>Last Updated On: 20/06/2011 9:14:34AM</div> <div>Last Updated By: SAMPLE</div> </div> </div>				
<div> <div>Sub-Plan Data</div> <div>Find View All</div> <div>First 1 of 1 Last</div> <div> <div>*Sub-Plan:</div> <div>Last Updated On:</div> <div>Last Updated By:</div> </div> </div>				

This example illustrates the fields and controls on the Application Data page (2 of 3). You can find definitions for the fields and controls later on this page.

Application Data	
Application Center: UGRD Undergrad	*Notification Plan: Regular
*Admit Type: TRF Transfer	Application Method:
Academic Level:	*Application Fee Status: Received
Housing Interest: Off Campus	Application Fee Date: 07/01/2011
<input type="checkbox"/> Prior Application	Application Fee Type: Standard
<input checked="" type="checkbox"/> Financial Aid Interest	Application Fee Amount:
	Application Fee Paid: 50.00
	Waive Amount:
Waiver Basis Code:	Additional Fields
Last School Attended:	
Graduation Date:	
<input type="checkbox"/> Previous Attendance	From Date: To Date:
<input type="checkbox"/> Graduated early?	<input type="checkbox"/> Not Currently Attending School
<input type="checkbox"/> Electronic Signature	<input type="checkbox"/> Criminal Conviction
Last Updated On: 20/06/2011 1:19:06PM	Last Updated By: SAMPLE

Application Fees	
*Tender Category:	Tender Amount: + -
Last Updated On:	Last Updated By:

This example illustrates the fields and controls on the Application Data page (3 of 3). You can find definitions for the fields and controls later on this page.

▼ Recruiting Categories		Find View All	First	1 of 1	Last
*Recruitment Category:	<input type="text"/>				
Sub-Category:	<input type="text"/>				
Last Updated On:					
Last Updated By:					
Recruiters		Find View All	First	1 of 1	Last
*Recruiter ID:	<input type="text"/>				
Primary Flag	<input type="checkbox"/>				
Last Updated On:					
Last Updated By:					
▼ Student Response		Find View All	First	1 of 1	Last
*Sequence number:	<input type="text"/>				
*Response Date:	09/09/2013				
External Org ID:	<input type="text"/>				
Description:	<input type="text"/>				
*Response Reason:	<input type="text"/>				
Last Updated On:					
Last Updated By:					
▼ Other Institutions		Find View All	First	1 of 1	Last
School:	000010001	Falls Valley High School			
Location:	1				
School Type:	Secondary				
Proprietorship:	Public				
City:	Mission Hills				
State:	CA				
Country:	USA				
Last Updated On:					
Last Updated By:					
▼ Source of Interest		Find View All	First	1 of 1	Last
Referral Source:	EVNT	Campus Event			

For documentation about many of the fields on this page:

See [Adding New Applications Manually](#)

Field or Control	Description
Set Status to Submitted	<p>This button only appears if the application status is Posted.</p> <p>If you have inadvertently posted the transaction data to a wrong ID, click the Set Status to Submitted button. On clicking the button, the system sets the application status back to Submitted. For example, you may notice that an application was posted to a new ID but you should have created the application for an existing ID. To repost the application to the existing ID, perform the following steps:</p> <ol style="list-style-type: none"> 1. Run the Application Delete process to delete the application that you have posted to the wrong ID so that you do not maintain duplicate applications in the system. 2. Click the Set Status to Submitted button and save the record. 3. Click the Set to Update ID button and select the existing ID. 4. Click the Run Search/Match/Post button to post the application.
Application Status	<p>Indicates the status of the application transaction.</p> <hr/> <p>Note: The Transaction Setup component refers to this as Transaction Status. Transaction Status is the same as the Status field shown in the Related Transactions grid displayed on the Summary Information page of the Constituent Staging component. We have modified only the label as Application Status to show the relationship with the application transactions. For a list of Application Status values, refer to following table.</p> <hr/>

Application Status	Description
Saved	<p>This status indicates that system has saved the admission application to the staging records and the application is not ready to be processed.</p> <p>The system automatically assigns this status when the online application calls the Save Application service operation.</p> <p>You can also manually set this status if you want to indicate that the application is not ready for processing.</p> <p>When setting up the File Mapping Definition, you can define the default value that File Parser should assign as the Application Status.</p>

<i>Application Status</i>	<i>Description</i>
Submitted	<p>This status indicates that system has submitted the admission application to the staging records and the application is ready to be processed.</p> <p>The system automatically assigns this status to an application when the online application calls the Submit Application service operation.</p> <p>You can manually set this status if you want to indicate that the application is ready for processing. You cannot post Saved transactions; only transactions with Submitted status can be posted.</p> <p>When setting up the File Mapping Definition, you can define the default value that File Parser should assign as the Application Status.</p>
Saved Error	<p>This status indicates that the system encountered problems when saving an admission application. You must resolve these errors before the admission application can be posted.</p> <p>You cannot manually change this status. When you resolve the error and save the staging record, the system automatically sets the status back to Saved.</p>
Submit Error	<p>This status indicates that the system encountered problems when submitting an admission application. You must resolve these errors before the admission application can be posted.</p> <p>You cannot manually change this status. When you resolve the error and save the staging record, the system automatically sets the status back to Submitted.</p>
Pending	<p>This status indicates that manual reconciliation is required for some data element which is not necessarily an error.</p> <p>For example, when manual reconciliation is required for application fee waiver requests, the status is set to Pending and the application fee status is set to Waiver. You can manually change this status.</p>
Posted	<p>This status indicates that the system has posted the data. The system runs the posting process when you click the Post Transaction Data button or the Run Search/Match/Post button, or when you run the Transaction Management process.</p>

Application Fees

Use the Application Data and Application Fees regions of the page to view or update application fee details. AAWS uses the payment integration services to enable application fees calculation and payment.

The setup of the AAWS Application Fee and Waiver Processing group box on the Application Center Table page controls how an online application fee payment or waiver is processed.

See [Setting Up Application Processing Centers](#)

See "Using the SSF_EPAYMENT_TRANS Web Service" (Student Financials)

When payment is authorized, the Amount Sent to GL field is updated in the Application Transactions staging component (the field is not visible on the page) and is carried through to the core production Application Maintenance component (Application Items page). The Generate Direct to GL process uses the Amount Sent to GL value.

See "Generating Direct to GL Entries" (Student Financials)

The following scenarios discuss how the system updates the Application Data staging page fields when an online application fee or waiver is processed in Self-Service mode — based on the setup of the AAWS Application Fee and Waiver Processing group box on the Application Center Table page.

The staging field SAD_APL_DAT_STG.APP_FEE_STATUS is not visible on the Application Data staging page.

Processing Application Fees When Waiver Request is Not Allowed

SCENARIO 1

The Application Center Table setup is:

- An application fee is required.
- Payment is required when the application is submitted.
- Waiver request is not allowed.

When an applicant has completed all the required data for the online application and is ready to submit the application, the applicant clicks a payment button which triggers the AAWS Submit web service operation (SAD_SUBMITAPPL). The web service operation calls the Application Fee Calculation API which calculates the fee and returns the amount and currency to the external user interface which displays the fee to the applicant.

The staging field SAD_APL_DAT_STG.APP_FEE_STATUS is set to Calculated.

When the applicant successfully makes a payment, the application is submitted. The SAD_APL_DAT_STG.APPL_FEE_STATUS field is set to Received.

The field values are carried through to the core production Application Maintenance component: ADM_APPL_DATA.APP_FEE_STATUS is set to Calculated and ADM_APPL_DATA.APPL_FEE_STATUS is set to Received.

If the applicant does not successfully complete the payment process, the application remains in a saved status.

SCENARIO 2

The Application Center Table setup is:

- An application fee is required.

- Pay later is allowed.
- Waiver request is not allowed.

If the applicant selects to pay now, the process is the same as SCENARIO 1.

If the applicant selects to pay later, SAD_APL_DAT_STG.APP_FEE_STATUS is set to Calculated and SAD_APL_DAT_STG.APPL_FEE_STATUS is set to Defer.

These values are carried through to core production: ADM_APPL_DATA.APP_FEE_STATUS is set to Calculated and ADM_APPL_DATA.APPL_FEE_STATUS is set to Deferred. The Admissions office must follow up on fee payment. No other processing occurs in AAWS.

Processing Application Fee Waivers in Staging

SCENARIO 3

The Application Center Table setup is:

- An application fee is required.
- Payment is required when the application is submitted OR pay later is allowed.
- Waiver request is allowed.
- Manual reconciliation is required.

If the applicant completes the payment, the process is the same as SCENARIO 1.

If the applicant requests a waiver, the applicant indicates the waiver basis (if required based on setup on Application Center Table page) and provides supporting documentation (optional - may be submitted by uploading an attachment or at a later time) and submits the application.

Because Require Manual Reconciliation is selected as the Application Fee Waiver Process option on the Application Center Table page, then when the applicant submits the application, the staging fields are set as follows:

- SAD_APL_DAT_STG.SAD_APPL_STS is set to Pending.
- SAD_APL_DAT_STG.APPL_FEE_STATUS is set to Waiver.
- SAD_APL_DAT_STG.WAIVED_AMT is set to blank.
- SAD_APL_DAT_STG.APP_FEE_STATUS is set to Pending.

The administrator reviews supporting documentation (Supplemental Information page) and grants or denies the waiver.

If the waiver is granted, the staging fields are updated as follows:

- The administrator changes the staging Application Fee Status value to Waived.
- Programmatically, SAD_APL_DAT_STG.SAD_APPL_STS is set to Submitted.
- SAD_APL_DAT_STG.WAIVED_AMT shows the waiver amount.

- SAD_APL_DAT_STG.APP_FEE_STATUS is set to Calculated.

These values are carried through to core production Admissions tables:

- On the Application Data - Application Fees page, the Fee Status value is Waived, the Waive Amount value appears, and the Waiver Basis Code value appears based on the value in the related staging field.
- On the Application Data page, the value in the Status field in the Application Fee Information group box is Calculated.

If the waiver is denied, the administrator sets the Application Fee Status to Pending and the Application Status is automatically set to Saved. The administrator must notify the applicant that the waiver request is denied.

Processing Application Fee Waivers in Core Admissions

SCENARIO 4

The Application Center Table setup is:

- An application fee is required.
- Payment is required when the application is submitted OR pay later is allowed.
- Waiver request is allowed.
- Application can be posted to core production before waiver request is determined.

If the applicant completes the payment, the process is the same as scenario 1.

If the applicant selects to pay later, the process is the same as scenario 2. The Admissions office must follow up on fee payment or waiver. No other processing occurs in AAWS.

If the applicant requests a waiver, the applicant indicates the waiver basis (if required based on setup on Application Center Table page) and provides supporting documentation (optional - may be submitted by uploading an attachment or at a later time) and submits the application.

If Allow to Post is selected as the Application Fee Waiver Process option and the App Fee Status Waived option is selected on the Application Center Table page, then when the applicant submits the application, the staging fields are set as follows:

- SAD_APL_DAT_STG.APPL_FEE_STATUS is set to Waived.
- SAD_APL_DAT_STG.WAIVED_AMT is set to blank.
- SAD_APL_DAT_STG.APP_FEE_STATUS is set to Calculated.

These values are carried through to core production Admissions tables:

- On the Application Data - Application Fees page, the Fee Status value is Waived, the Waive Amount value is blank and the Waiver Basis Code value appears based on the value in the related staging field.
- On the Application Data page, the value in the Status field in the Application Fee Information group box is Calculated.

The App Fee Status Waived option could be used by schools who allow waivers but automatically grant the waiver without review or assessment.

If Allow to Post is selected as the Application Fee Waiver Process option and the App Fee Status Waiver Request option is selected on the Application Center Table page, then when the applicant submits the application, the staging fields are set as follows:

- SAD_APL_DAT_STG.APPL_FEE_STATUS is set to Waiver.
- SAD_APL_DAT_STG.WAIVED_AMT is set to blank.
- SAD_APL_DAT_STG.APP_FEE_STATUS is set to Pending.

These values are carried through to core production Admissions tables:

- On the Application Data - Application Fees page, the Fee Status value is Waiver, the Waive Amount value is blank and the Waiver Basis Code value appears based on the value in the related staging field.
- On the Application Data page, the value in the Status field in the Application Fee Information group box is Pending.

Waiver requests must be assessed using the core production Application Maintenance component.

Query the record ADM_APPL_DATA and the field APPL_FEE_STATUS to find the applicants with waiver requests.

The following scenarios discuss how the system updates the Application Data staging page fields when an online application fee or waiver is processed in Administrator mode — based on the setup of the AAWS Application Fee and Waiver Processing group box on the Application Center Table page.

Because, in Administrator mode, an administrative user is entering application data on behalf of the applicant, an institution may design the user interface for Administrator mode differently than the user interface for Self-Service mode. In the user interface for Self-Service mode, the institution may implement greater control to dictate what options are presented to an applicant based upon the application center parameters for application fees and waiver processing for AAWS. For Administrator mode, although there may be less control in dictating these options, the application center parameters must still be enforced. Therefore, while the following scenarios are similar to the scenarios listed above for Self-Service mode, some of the logic and behavior for Administrator mode may vary.

Scenario 1

The Application Center Table setup is:

An application fee is *not* required.

User completes all the required sections of the application form and submits the application. Fields are set as follows:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = Pending.
- APPL_FEE_TYPE = UI determined.
- APPL_FEE_DT = Submit date.

Scenario 2

The Application Center Table setup is:

- An application fee is *not* required.
- Payment is required when the application is submitted.
- Waiver request is not allowed.

In this scenario, in order to submit the application, the user must populate the APPL_FEE_STATUS = Received (REC) and may give the fee amount. If the APPL_FEE_STATUS is not set to Received (REC), the application will remain in Saved status in the staging component.

- Application fee calculation returns value to the application fee amount field.
- User must indicate APPL_FEE_STATUS = Received (REC).
- User may indicate the APPL_FEE_PAID value.
- User may populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (REC).
 - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank
 - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2) (returned from the fee calculation API).
 - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
 - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS = Received (REC).
 - ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.
 - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
 - ADM_APPL_TENDER.TENDER_AMT = User-populated value.

- Because the application center setup dictates that the fee is required and must be paid at application submission, failure to indicate an APPL_FEE_STATUS of Received (REC) results in the application remaining in Saved status in the staging component, with these fields set as follows:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Pending.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Pending.
 - SAD_APL_DAT_STG.SCC_TRANS_STS = SAVED.

Scenario 3

The Application Center Table setup is:

- An application fee is required.
- Payment is not required at submission (payment can be made later).
- Waiver request is not allowed.

In this scenario, at application submission, the user has the option to either:

- Provide fee payment details or
- Submit an application without payment details.

The APPL_FEE_STATUS values in use for this scenario are REC and DEF.

If the user provides the fee payment details:

- User must indicate APPL_FEE_STATUS = Received (REC).
- User *may* indicate the APPL_FEE_PAID value.
- User *may* populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (REC).
 - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank
 - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2) (returned from the fee calculation API).
 - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
 - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS = Received (REC).

- ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.
- ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
- ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
- ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
- ADM_APPL_TENDER.TENDER_AMT = User-populated value.

However, the user may opt to submit without populating the application fee status field. Because the system cannot rely on a user supplying the correct value of *Defer*, the system enforces application fee status to *DEF* if the application fee status value does not = *Received (REC)*. If the application is submitted without any payment details:

- Fields are set as follows:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = *Defer (DEF)*.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2)*.
 - SAD_APL_DAT_STG.APPL_FEE_PAID = *Blank*.
 - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS = *Defer (DEF)*.
 - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2)*.
 - ADM_APPL_DATA.APPL_FEE_PAID = *Blank*.
 - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.

Scenario 4

The Application Center Table setup is:

- An application fee is required.
- Payment is required at submission.
- Waiver request is allowed.

In this scenario, the user must:

- Provide fee payment details or
- Provide fee waiver details.

If neither payment nor waiver details are provided at application submission, the application must remain in *Saved* status.

Valid APPL_FEE_STATUS values in use for this scenario are REC, WRQ, WVD, and PENDING.

User provides the fee payment details:

- User must indicate APPL_FEE_STATUS = Received (REC).
- User *may* indicate the APPL_FEE_PAID value.
- User *may* populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (REC).
 - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank
 - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2) (returned from the fee calculation API).
 - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
 - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS = Received (REC).
 - ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.
 - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
 - ADM_APPL_TENDER.TENDER_AMT = User-populated value.

User provides waiver details:

- If application center setting for waiver processing is Require Manual Reconciliation then:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Waiver request (WVQ) (the system enforces WVQ even if user provides WVD).
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2).
 - SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
 - SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.

With this setting in place, in staging SAD_APL_DAT_STG, SCC_TRANS_STS is set to *Pending*.

- The same values are carried through to production as (these values may change as the user will do manual reconciliation and update some values.):
 - ADM_APPL_DATA.APPL_FEE_STATUS = User-provided value that the system stores in the staging table during reconciliation.
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
 - ADM_APPL_DATA.SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.
- Else, if application center setting for waiver processing is *Allow to Post* then:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Setting specified on the application center parameters for waiver processing is either Waived (WVD) or Waiver request (WVQ). The system enforces WVD or WVQ from application center setting regardless of what user indicates.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2).
 - SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
 - SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS = Determined value of WVD or WVQ based upon application center setting.
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
 - ADM_APPL_DATA.SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.
- If the APPL_FEE_STATUS is not REC, WVD, (or WRQ) then:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Pending (PEN).
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Pending (1).
 - SAD_APL_DAT_STG.SCC_TRANS_STS = SAVED.

Scenario 5

The Application Center Table setup is:

- An application fee is required.
- Payment is not required at submission (payment can be made later).
- Waiver request is allowed.

In this scenario, the user can:

- Provide fee payment details or
- Provide fee waiver details.
- Not provide either payment or waiver details.

Valid APPL_FEE_STATUS values in use for this scenario are REC, DEF, WRQ, WVD, and PENDING.

If the user provides the fee payment details:

- User must indicate APPL_FEE_STATUS = Received (REC).
- User *may* indicate the APPL_FEE_PAID value.
- User *may* populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (REC).
 - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank
 - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2) (returned from the fee calculation API).
 - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
 - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS = Received (REC).
 - ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.
 - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
 - ADM_APPL_TENDER.TENDER_AMT = User-populated value.

User provides waiver details:

- If application center setting for waiver processing is *Require Manual Reconciliation* then:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Waiver request (WVQ) (the system enforces WVQ even if user provides WVD).
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2).
 - SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
 - SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.

With this setting in place, in staging SAD_APL_DAT_STG. SCC_TRANS_STS is set to *Pending*.

- The same values are carried through to production as (these values may change as the user will do manual reconciliation and update some values.):
 - ADM_APPL_DATA.APPL_FEE_STATUS = User-provided value that the system stores in the staging table during reconciliation.
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
 - ADM_APPL_DATA. SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.
- Else, if application center setting for waiver processing is *Allow to Post* then:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Setting specified on the application center parameters for waiver processing is either Waived (WVD) or Waiver request (WVQ). The system enforces WVD or WVQ from application center setting regardless of what user indicates.
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2).
 - SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
 - SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS = Determined value of WVD or WVQ based upon application center setting.
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
 - ADM_APPL_DATA. SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.

User submits without payment details or waiver details:

Because the system cannot rely on a user supplying the correct value of Defer (DEF), the system enforces application fee status to DEF if the application fee status value does not = REC, WVD, or WVQ.

- Fields are set as follows:
 - SAD_APL_DAT_STG.APPL_FEE_STATUS = Defer (DEF).
 - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2).
 - SAD_APL_DAT_STG.APPL_FEE_PAID = Blank.
 - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
- The same values are carried through to production as:
 - ADM_APPL_DATA.APPL_FEE_STATUS= Defer (DEF).
 - ADM_APPL_DATA.APP_FEE_STATUS = Calculated (2).
 - ADM_APPL_DATA.APPL_FEE_PAID = Blank.
 - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.

Reviewing Additional Information

Access the Additional Information page (**Student Admissions >Application Transaction Mgmt >Application Transactions >Additional Information**).

This example illustrates the fields and controls on the Additional Information page.

Application Data	Additional Information	Education History	Additional Academic Info	Supplemental Information
Temporary ID: 3 User ID: Created Datetime: 20/06/2011 9:14AM Created By: Constituent Staging		Name: Jamison, Susan Constituent Status: Ignore ID: <input type="button" value="Run Search/Match/Post"/>		
*Institution: PeopleSoft University Application Nbr: 00024795 Application Status: Submitted		Academic Career: Undergraduate Application Status Date: 20/06/2011 <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>		
Program Data Find View All First 1 of 2 Last				
Program Number: 1		*Academic Program: LAU Lib Arts		
Program Attributes Find First 1 of 1 Last				
*Attribute Rank on Wait List <input type="text" value="10"/>				
<input checked="" type="checkbox"/> Show in Student SS				
Plan Data Find View All First 1 of 1 Last				
*Academic Plan: BIOLBS				
Plan Attributes Find First 1 of 1 Last				
*Attribute Student Language <input type="text" value="SP"/> Spanish				
<input checked="" type="checkbox"/> Show in Student SS				
Sub-Plan Data Find View All First 1 of 1 Last				
*Sub-Plan: PHOTO Photo Biology				
Attributes				

See [Entering or Updating Additional Information](#)

See "Understanding Common Attribute Framework" (Campus Community Fundamentals)

Reviewing Applicant's Education History

Access the Education History page (**Student Admissions >Application Transaction Mgmt >Application Transactions >Education History**).

This example illustrates the fields and controls on the Education History page (1 of 3).

Application Data | **Education History** | Additional Academic Info | Supplemental Information

Temporary ID: 55 Name: Riley, Ramirez
 User ID: SSADM215 Constituent Status: **Suspended**
 Created Datetime: 11/09/2011 7:42AM ID:
 Created By: SSADM215 [Run Search/MatchPost](#)
[Constituent Staging](#)

*Institution: PeopleSoft University Academic Career: Undergraduate Engineering
 Application Nbr: 00024894 Application Status Date: 11/09/2011
 Application Status: **Submitted** [Expand All](#) [Collapse All](#)

School Information [Find](#) | [View All](#) First 1 of 3 Last

Sequence Number: 1
 External Org ID: 000010001 [Falls Valley High School](#)
 School Name:
 School Country:
 School Address:
 School City:
 School State: School Postal:
 School CEEB Code: School ACT Code:
☐ Home School ☐ Last School
 Last Updated On: 11/09/2011 7:42:20AM Last Updated By: SSADM215

This example illustrates the fields and controls on the Education History page (2 of 3).

Career Data [Find](#) | [View All](#) First 1 of 1 Last

*Data Number: 1 *Career: **High Schl** Academic Load:
 Term Type: **Semester** External Term: **FALL** [Fall](#)
 Term Year: 2000 Academic Level: **Senior** ☐ Dismissed from School
 From Date: 08/01/2000 To Date: 05/15/2004 [Comments](#) [Canadian Extension](#)
 Last Updated On: 03/05/2012 9:55:09AM Last Updated By: SSADM215

Transcript Status

*Action	Transcript Date	Date Received	Transcript Type	Transcript Status	Data Source	Data Medium
Received	01/22/2010	01/22/2010	Official	Final	Self-Rptd	Hard Copy

Transcript Summary [Personalize](#) | [Find](#) | [View All](#) First 1-2 of 2 Last

Term	GPA/Units	Rank	Audit
1	Grade 12	Fall	2000
2	HS Overall	Fall	2000

External Subjects [Personalize](#) | [Find](#) | [View All](#) First 1-2 of 2 Last

*External Subject Area	*Course Level	Academic Institution	GPA Type	External GPA	Converted GPA
1 MATH	Math	Regular	PSU	100B	3.750
2 SCNC	Science	Regular	PSU	100B	3.500

This example illustrates the fields and controls on the Education History page (3 of 3).

External Courses						
Course	Grades	Timeframe	Details	Audit		
*Course Seq	*School Subject	Description	*Course Nbr	*Course Name		
1	PHYS	Physics 94	94	College Physics - Honors	+	-
2	MATH		100	College Algebra	+	-
3	CHEM		100	AP Chemistry	+	-

External Degrees						
Degree	Field of Study	Transcript	Audit			
*Degree Number	Degree	*Description	*Degree Date	*Data Source	*Degree Status	*Honors Category
1	1	HSD High School Diploma	05/15/2004	Self-Rptd	Complete	None

Reviewing Additional Academic Information

Access the Additional Academic Info page (**Student Admissions > Application Transaction Mgmt > Application Transactions > Additional Academic Info**).

This example illustrates the fields and controls on the Additional Academic Info page.

Application Data	Education History	Additional Academic Info	Supplemental Information															
Temporary ID: 602 Name: Billingsley, Mandy User ID: SSADM340 Constituent Status: Loaded Created Datetime: 04/27/2010 7:41AM ID: Constituent Staging Run Search/Match/Post																		
Institution: PeopleSoft University Academic Career: Undergraduate Application Nbr: 00025088 Application Status Date: 04/27/2010 Application Status: Submitted Expand All Collapse All																		
Test Results Find View All First 1 of 1 Last *Test ID: SAT I Scholastic Assessment Test I Last Updated On: 04/27/2010 7:41:41AM Last Updated By: SSADM340 <table border="1"> <thead> <tr> <th>Test Component</th> <th>Others</th> <th>Audit</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td>*Test Component</td> <td>Test Score</td> <td>%tile</td> <td>*Test Date</td> <td></td> </tr> <tr> <td>1 ES</td> <td>7.00</td> <td></td> <td>05/01/2009</td> <td></td> </tr> </tbody> </table>				Test Component	Others	Audit			*Test Component	Test Score	%tile	*Test Date		1 ES	7.00		05/01/2009	
Test Component	Others	Audit																
*Test Component	Test Score	%tile	*Test Date															
1 ES	7.00		05/01/2009															
Academic Interests Find View All First 1 of 1 Last *Academic Career: UGRD Undergraduate Last Updated On: 04/27/2010 7:41:41AM Last Updated By: SSADM340 <table border="1"> <thead> <tr> <th>Academic Interests</th> <th>Audit</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td>*SeqNum</td> <td>Subject Area</td> <td>*Description</td> <td>*Data Source</td> </tr> <tr> <td>1 1</td> <td>BIOL</td> <td>Biology</td> <td>Self-Rptd</td> </tr> </tbody> </table>				Academic Interests	Audit			*SeqNum	Subject Area	*Description	*Data Source	1 1	BIOL	Biology	Self-Rptd			
Academic Interests	Audit																	
*SeqNum	Subject Area	*Description	*Data Source															
1 1	BIOL	Biology	Self-Rptd															

Reviewing General Materials and Attachments

Access the Supplemental Information page (**Student Admissions >Application Transaction Mgmt >Application Transactions >Supplemental Information**).

This example illustrates the fields and controls on the Supplemental Information page (1 of 2).

Application Data		Education History		Additional Academic Info		Supplemental Information	
Temporary ID:	63	Name:	Riley, Ramirez				
User ID:	SSADM215	Constituent Status:	Suspended				
Created Datetime:	03/05/2012 9:55AM	ID:	Run Search/Match/Post				
Created By:	SSADM215						
Constituent Staging							
*Institution:	PeopleSoft University	Academic Career:	Undergraduate Engineering				
Application Nbr:	00024897	Application Status Date:	03/05/2012				
Application Status:	Submitted	Expand All		Collapse All			

This example illustrates the fields and controls on the Supplemental Information page (2 of 2).

General Materials		Find View All		First 1 of 2 Last	
*Material Group:	UGESSAYS	Undergraduate Essays			
*Material Type:	ESS	Essay			
*Material Nbr:	1	<input checked="" type="checkbox"/> Checklist Item Update			
Date Received:	01/22/2010	Date Recorded:	01/22/2010		
Essay Topic:	PRS	Personal Statement			
Comments:	Essay Comment				
Last Updated On:		03/05/2012 9:55:09AM		Last Updated By: SSADM215	
File Attachments		Personalize Find View All		First 1 of 1 Last	
Attachments		Audit			
Attached File	Description	View			
Essay.doc	Essay.doc	View			
Add					
File Attachments		Personalize Find View All		First 1 of 1 Last	
Attachments		Audit			
Attached File	Description	View			
personal_statement.doc	personal_statement.doc	View			
Add					

Reviewing Candidature Details Information

Access the Candidature Details page (**Student Admissions >Application Transaction Mgmt >Application Transactions >Candidature Details**).

This example illustrates the fields and controls on the Candidature Details page (1 of 3).

Application Data	Education History	Additional Academic Info	Supplemental Information	Candidature Details
Temporary ID: 5 User ID: CJR100 Created Datetime: 02/27/2012 8:11AM Created By: CJR100 Constituent Staging	Name: Brinton, Lene Constituent Status: Loaded ID: 0065 <input type="button" value="Run Search/Match/Post"/>			
*Institution: PeopleSoft University Application Nbr: 00024847 Application Status: Submitted				
Academic Program: Medicine Academic Plan: Animal Testing Research 1				
Academic Career: Medical School Application Status Date: 02/27/2012 <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>				
Candidate Number: 000000000002				
Attachments (0)				
<div> <div> ▼ Consumption </div> <div> <div>Find</div> <div>View All</div> <div>First</div> <div>1 of 1</div> <div>Last</div> </div> </div>				
Earliest Submission Date: 11/30/2011				
Final Submission Date: 12/30/2011				
*Consumption Load: 80				
Status: CHANGE				
Status Date: 02/08/2012				

This example illustrates the fields and controls on the Candidature Details page (2 of 3).

[illegible]

This example illustrates the fields and controls on the Candidature Details page (3 of 3).

The screenshot displays the 'Candidature Details' page, specifically the 'Supervisors' and 'Assignment' sections. The 'Supervisors' section includes a 'Supervisor Search' button and a list of supervisor details. The 'Assignment' section includes an 'Assignment' dropdown and a list of assignment details.


Supervisors	
*Supervisor Sequence:	1
Attachments (0)	
Supervisor Details	
Supervisor Search	
*Supervisor:	FA0802 Kabahit, Joel
Advisory Committee:	FELLOW Fellowship
Supervision Percentage:	100.00
Start Date:	09/01/2011
End Date:	02/29/2012
Funding Percentage:	100.00
Budget Department:	CHEMISTRY
Academic Organization:	CHEMISTRY
*Supervisor Type:	PSUP Primary Supervisor
*Status Date:	02/08/2012
Status:	REVIEW Review in Progress

Assignment	
Assignment:	AN Animal Testing Clearance
Attachments (0)	
Assignment Details	
Approver ID:	
Status:	AT10 AT Review Pending
Status Date:	02/21/2012

Reviewing Application Regional Information

Access the Application Regional page (**Student Admissions >Application Transaction Mgmt >Application Transactions >Application Regional**).

This example illustrates the fields and controls on the Application Regional page.

Academic Institution PeopleSoft Australia Uni	
Academic Career Undergraduate	
Application Number 00025084	
 Australia	
<div> <div>Program Data</div> <div>Find View All First 1 of 1 Last</div> </div>	
Program Number 0	Effective Date 23/09/2013
Admit Term 0781 2017 Sem1	Effective Sequence 1
Academic Program	
*Mode of Attendance Internal Mode of Attendance	
Cohort	
Funding Source	
Highest Attainment E620	
ATAR E632	
Selection Rank E605	
VET Study Reason Code E575	
VET Labour Force Status Code E576	
<input type="checkbox"/> VET Course Assurance Indicator E619	
Primary field of research code E594	
Secondary field of research code E595	
<div> <div>Program Data</div> <div>Find View All First 1 of 1 Last</div> </div>	
Program Number 0	Effective Date 23/09/2013
Admit Term 0781 2017 Sem1	Effective Sequence 1
Academic Program	

The system displays this page only if the country-specific options are selected on the SA Features and Academic Institution 6 pages.

Related Links

"Selecting Country-Specific Features and Enabling CRM for Higher Education Feature" (Campus Solutions Application Fundamentals)

"(AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features" (Campus Solutions Application Fundamentals)

Using File Parser for Loading Applications

Related Documentation for Using File Parser for Loading Applications

Ensure that you review the following:

- [Understanding Admission Transactions](#)
- "Understanding CTM" (Campus Community Fundamentals)
- "Understanding the File Parser Process" (Campus Community Fundamentals)
- "Understanding Entity Registry" (Campus Community Fundamentals)
- AAWS Data Mapping and Entity Catalog document which was posted to My Oracle Support (ID 1323959.1)

Before You Begin

You can use the Campus Community File Parser utility to load admission applications from a text file into Campus Solutions. Before you begin setting up File Parser to load your external applications, there are a few things that might be helpful to do. You may want to consider doing this with a spreadsheet or data modeling tool:

- Review the external application data to determine which staging records and fields will be populated. Utilize the Entity Registry feature to get a clear understanding of the staging table hierarchy.
- Document each record to be populated, the fields within each record that will come from the external data, and which fields need to be populated with default values. Utilize the AAWS Data Mapping and Entity Catalog document to view each of the staging records and their associated fields.
- Determine which incoming fields will need to be converted to internal values.
- Document the non-required incoming data elements so you know which records need to have Skip if Blank selected for the mapped data element.
- Determine which fields require developing a calculated field. Examples include: Application Center, External Organization ID, and Degree Description.

Setup for Loading Applications Using File Parser

The key setup areas that apply to bulk loading of applications are:

- Campus Community File Parser.
- Campus Community Constituent Transaction Management (CTM).
- Campus Community Entity Registry.
- Application Configuration (Configuring admission transactions).

Setting Up Admission Transactions

Define and configure an admission transaction that represents data in the external file.

This example illustrates the CTM Transaction Setup page for a bulk load admission transaction (1 of 2).

Transaction Setup		Search/Match Setup	
Transaction:	AAWS_FP_ADMAPPLS		
*Transaction Name:	<input type="text" value="AAWS File Parser"/>		
Transaction Description:	<div>This transaction code is used ONLY for testing File Parser - AAWS Transactions</div>		
*Transaction Status:	<input type="button" value="Active"/>		
*Data Update Rule:	<input type="text" value="DEFAULT_UPDATE_RULE"/>		
Transaction Options			
<input type="checkbox"/> Online Transaction	Process Search/Match: <input checked="" type="radio"/> Batch <input type="radio"/> Realtime		
Transaction Handler			
*Root Package ID:	<input type="text" value="SCC_OLA"/>		
*Path:	<input type="text" value="TRANSACTION"/>		
*Application Class ID:	<input type="text" value="AdmissionTransaction"/>		
Transaction Status and Date			
*Staged Record Name:	<input type="text" value="SAD_APL_DAT_STG"/> Application Data		

This example illustrates the CTM Transaction Setup page for a bulk load admission transaction (2 of 2).

Constituent Handler	
*Root Package ID:	SCC_SL_TRANSACTION
*Path:	INTFC
*Application Class ID:	DefaultConstituent

Partition Data	
<input type="radio"/> By Constituent	<input checked="" type="radio"/> By Transaction

Transaction Data Launch View	
Menu Name:	PROCESS_APPLICATIONS
Menu Bar Name:	USE &Use
Menu Item Name:	SAD_APPL_STG Application Transactions
Menu Page Name:	SAD_APPL_STG Application Transaction Stagin

Ensure that the following parameters are set up:

- Set the Transaction Status as Active.
- Deselect the Online Transaction check box. This indicates that the transaction is offline (that is, File Parser will add the data to the stage records offline). This will automatically set Process Search/Match to Batch.

Setting Up File Parser

File Parser consists of several key components:

- **Field Conversion Definitions** – Identifies external file field values to convert before storing the data in the target staging table.
- **Context Definitions** – Identifies the parent-to-child relationship of the staging tables that will be used to hold the data.
- **File Mapping Definitions** – Associates fields on the external file with the records in the context definition.

Make sure you enter a row for the required constituent (CTM) and transaction staging records on the Context Definition page and the Mapping page of File Mapping Definition component:

- SCC_STG_CONSTIT. It is required to set the following fields, even though they are not necessarily required in the record:
 - SUBMITTED - Default to N
 - SCC_TRANSAC_CD – Set according to Transaction Setup

- SCC_STG_STATUS – Default to LD (Loaded)
- SCC_STG_STATUS_DT – Default to %Date
- SCC_SL_TRNMAP (Select Force Insert)
- SCC_STG_NAMES
- SCC_STG_PERSSA (Select Force Insert if no incoming fields are mapped)
- SCC_STG_STD_CAR
- SAD_APP_CSQ_STG
- SAD_APL_DAT_STG It is required to set the following fields, even though they are not necessarily required in the record:
 - SCC_TRANSAC_CD – Set according to Transaction Setup
 - SCC_TRANS_STS – Default to SB (Submitted) or SV (Saved) depending on your business process
 - SCC_TRANS_STS_DT – Default to %Date
- SAD_APL_PRG_STG
- SAD_APL_PLN_STG

Warning! When using a file to upload data into the stage records, do not populate the EMPLID field with a value that is not already created inside your production database. Doing so will cause the post process to production tables to fail (the EMPLID value passed will not be used to create a new EMPLID). The same is also true for the User ID (USERID field). The process will not create a User ID using the value entered in the file.

Use the Field Conversion Definition page to define field values in the external file that must be converted to internal values. Add any additional fields and complete the definition for the fields delivered.

This example illustrates the Field Conversion Definition page.

Field Conversion Definition

Conversion Profile:

Long Description:

Conversion Fields Find | View All First 14 of 39 Last

*Conversion Field: + -

Record (Table) Name:

*Unmatched Value Handling: ▼ Default Value:

Conversion Field Value Personalize | Find | View All First 1-4 of 4 Last

	File Value	Internal Value		
1	No, off-campus independently	F	<input type="text"/>	+ -
2	No, off-campus with other fami	C	<input type="text"/>	+ -
3	No, off-campus with parents	C	<input type="text"/>	+ -
4	Yes, on-campus	H	<input type="text"/>	+ -

Use the Context Definition page to add the delivered staging tables as well as any additional extension staging tables that need to be updated when loading data from the external file. You may have created the extension tables by performing steps listed in this section of the Developer Reference for Creating a New CTM Consumer documentation:

"Developer Reference for Creating a New CTM Consumer" (Campus Community Fundamentals)

Ensure that you enter the correct Parent Record field value. For bulk load of admission applications, SCC_STG_CONSTIT must be the first record entered as it is the parent to all records.

This example illustrates the Context Definition page (1 of 2).

Context Definition Record Tree

*Context Name: Conversion Definition Conversion Example ▼

Staging Table Records Find | View All First 1 of 36 Last

*Record: ▼ Constituent Sort Order + -

Parent Record:

Staging Table Fields Personalize | Find | View All First 1-19 of 19 Last

Field Name	Field Type	*Mapping Action	Visible for Mapping	Value	Field Format	Date Separator	Date Day	Date Month	Counter Record Name	Counter Field
1 SCC_TEMP_ID	Number	Unique Counter	<input type="checkbox"/>						SCC_STG_CTRS	SCC_TEMP_ID
2 SUBMITTED	Char	No Default	<input checked="" type="checkbox"/>							
3 USERID	Char	No Default	<input checked="" type="checkbox"/>							
4 EMPLID	Char	No Default	<input checked="" type="checkbox"/>							
5 SCC_TRANSAC_CD	Char	No Default	<input checked="" type="checkbox"/>							
6 BIRTHDATE	Date	No Default	<input checked="" type="checkbox"/>							
7 BIRTHPLACE	Char	No Default	<input checked="" type="checkbox"/>							
8 BIRTHSTATE	Char	No Default	<input checked="" type="checkbox"/>							

This example illustrates the Context Definition page (2 of 2).

[illegible]

For bulk load of admission applications, the counters that you must include in the context definition are:

- SCC_TEMP_ID: SCC_STG_CTRS.SCC_TEMP_ID
- ADM_APPL_NBR: INSTALLATION_SA.ADM_APPL_NBR LAST

Note: The unique counter for ADM_APPL_NBR must be set up in the context definition and the Visible for Mapping should be deselected for the ADM_APPL_NBR field.

Use the File Definition page to provide information about the external file.

This example illustrates the File Definition page.

File Definition

File Layout

Mapping

Preview Layout

Preview Data

Map Name

*Map Name

MAPPING EXAMPLE

*Status

Active

*Context Definition

Context Example

*File Type

Delimited

*Delimiter

Pipe

*Qualifier

"

Conversion Definition

Conversion Example

☐ Multiple Row Types

Use the File Layout page to define fields from the external file that will be loaded into the staging tables.

This example illustrates the File Layout page.

*Sort Order	File Field Name	Field Number	Field Type	Field Format	Trim	Date Separator	Date Day	Date Month	Decimal Position
1	10	First Name	1	Character	Proper	<input type="checkbox"/>			
2	20	FIRST_NAME_SRCH	1	Character	Upper	<input type="checkbox"/>			
3	30	Middle Name	2	Character	Proper	<input type="checkbox"/>			
4	40	Last Name	3	Character	Proper	<input type="checkbox"/>			
5	50	LAST_NAME_SRCH	3	Character	Upper	<input type="checkbox"/>			
6	60	Suffix	4	Character		<input type="checkbox"/>			
7	70	Sex	5	Character		<input type="checkbox"/>			
8	80	Former Last Name	6	Character	Proper	<input type="checkbox"/>			
9	81	FORMER_LAST_NAME_SRCH	6	Character	Upper	<input type="checkbox"/>			
10	90	Preferred Name	7	Character	Proper	<input type="checkbox"/>			

Use the Mapping page to associate fields defined on the File Layout page with staging table fields defined in the context definition.

This example illustrates the Mapping page.

Field Name	Field Type	Required	*Mapping Action	File Field Name	Sub Parse Field	Value	Skip if Blank
1 SUBMITTED	Char	No	Default Value			N	<input type="checkbox"/>
2 USERID	Char	No	None				<input type="checkbox"/>
3 EMPLID	Char	No	None				<input type="checkbox"/>
4 SCC_TRANSAC_CD	Char	No	Default Value			AAWS_FP_ADMA	<input type="checkbox"/>
5 BIRTHDATE	Date	No	Direct from File	Date of Birth	<input type="checkbox"/>		<input type="checkbox"/>
6 BIRTHPLACE	Char	No	Direct from File	Birth City	<input type="checkbox"/>		<input type="checkbox"/>
7 BIRTHSTATE	Char	No	Direct from File	Birth State	<input type="checkbox"/>		<input type="checkbox"/>
8 BIRTHCOUNTRY	Char	No	Direct from File	Birth Country	<input type="checkbox"/>		<input type="checkbox"/>
9 DT_OF_DEATH	Date	No	None				<input type="checkbox"/>
10 SCC_STG_STATUS	Char	No	Default Value			LD	<input type="checkbox"/>
11 SCC_STG_STS_DT	Date	No	Default Value			%Date	<input type="checkbox"/>
12 CREATED_DTTM	DTTM	No	Default Value			%DateTime	<input type="checkbox"/>
13 LASTUPDDTTM	DTTM	No	Default Value			%DateTime	<input type="checkbox"/>
14 SCC_SUBMITTED_DTTM	DTTM	No	None				<input type="checkbox"/>

There could be required description fields that may require a calculated field to populate. File Parser does not populate the description based on the code populated. You must build a calculated field to load a description. Examples of required description fields:

- Academic Interests - SCC_STG_ADMINT.DESCR
- Extracurricular Activities - SCC_STG_EXTRACU.DESCR

- External Degrees - SCC_STG_EXTDEGR.DESCR

SAD_APL_PRG_STG.APPL_PROG_NBR: To have the system automatically set the Application Program Number to zero (which is the default when adding a new application), set the Mapping Action for this field to a Default Value of 0. If you are inserting multiple program rows for one application number, set the second occurrence of this field to a Default Value of 1.

Use the Preview Data page to test your external file with the File Parser Definitions.

Note: The preview feature shows only the first row of each row type; therefore, you should use a small test file when using this component. Using a large test file is simply a waste of resources that could potentially degrade the application server.

This example illustrates the Preview Data page.

The screenshot shows the 'Preview Data' tab selected. The 'Map Name' is 'MAPPING EXAMPLE' and the 'Attached File' is 'Jan_2012_Blank_Fields.csv'. Below this, the 'Row Types' section shows 'MAPPING EXAMPLE' with '1 of 1' rows. The 'Field Mapping' section shows a table of field values for a record of type 'SCC_STG_CONSTIT'.

Field Name	Value
1 SUBMITTED	N
2 USERID	
3 EMPLID	
4 SCC_TRANSAC_CD	AAWS_FP_ADMAPPLS
5 BIRTHDATE	1996-02-11
6 BIRTHPLACE	Calgary
7 BIRTHSTATE	AB
8 BIRTHCOUNTRY	CAN
9 DT_OF_DEATH	
10 SCC_STG_STATUS	LD
11 SCC_STG_STS_DT	2011-11-23
12 CREATED_DTTM	2011-11-23-03.20.01.000000
13 LASTUPDDTTM	2011-11-23-03.20.01.000000
14 SCC_SUBMITTED_DTTM	

Running the File Parser Process

Run the File Parser process to load the application data from a text file into the staging tables. Each application is loaded as an admission transaction based on the default transaction code entered on the Mapping page.

Use the Run File Parser page to run the File Parser process.

This example illustrates the Run File Parser page.

Run File Parser

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

File Mapping ID: **MAPPING EXAMPLE**

File Path	File List Indicator
\\psbldfs\dfs\hcm\CS_DEV\testfiles\FileParser\Jan 2012 Blank Fi	<input type="checkbox"/>

Processing Staged Data

After loading the application data into the staging tables, review the staged constituent and applicant data. Then, run the CTM Transaction Management Process to search/match and post the staged data into the production tables of the Campus Solutions database. This process will also determine if any errors exist in the data being posted. If there are errors, the Constituent Staging Status is set to Error and the errors are displayed on the Constituent Staging (CTM) and Application Transactions components. Return to Constituent Staging and search for the transactions you are processing which have errors.

This example illustrates an example of using Constituent Staging component to search for transactions with an error.

Constituent Staging

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Temporary ID:

=

Transaction:

begins with

AAWS_FP_ADMAPPLS

Created Date:

=

Constituent Status:

=

Error

Last Name:

begins with

First Name:

begins with

Empl ID:

begins with

User ID:

begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Correct the errors indicated on each transaction. Then, run the Transaction Management Process again to post these records.

Commonly Used Calculated Mapping Application Class Objects

This section provides an example for how to derive: Application Center Default.

It is assumed that the person who will be responsible for creating and managing the Application Classes is a seasoned engineer who is comfortable with working with PeopleTools Application Designer, is well versed in writing PeopleCode, and has detailed knowledge of the referential integrity associated with the tables referenced by the File Parser Context definition.

Warning! This is only an example, and have not been exposed to any rigorous testing scenarios. Should you decide to use this example in any form, it is strongly recommended that a complete and thorough set of test cycle(s) be exercised before moving to production.

Application Center Default

Code example:

```
import SCC_FILE_PARSER:UTIL:FieldCalculationAbstract;
import SCC_FILE_PARSER:MODEL:Results:ResultsField;
import SCC_FILE_PARSER:MODEL:Results:ResultsRecord;
import SCC_FILE_PARSER:MODEL:Results:ResultsCollection;
import SCC_FILE_PARSER:UTIL:Exception:FileParserException;
import SAD_ADM_APPL:Setup:ApplicationDefaults;

/**
 * class ApplicationCenterDefault
 *
 * @version
 * @author
 *
 * Module:
 * Description:
 */

class ApplicationCenterDefault extends
SCC_FILE_PARSER:UTIL:FieldCalculationAbstract
  /* public methods */
  method ApplicationCenterDefault();
  method calculateValue(&ResultsFieldIn As
SCC_FILE_PARSER:MODEL:Results:ResultsField, &ResultsCollectionIn
As SCC_FILE_PARSER:MODEL:Results:ResultsCollection) Returns any;

private
  method GetFileData();
  method GetFieldReferences();

  instance string &Institution;
  instance string &Career;
  instance string &Program;
  instance string &Plan;
  instance string &Country;
  instance string &Citizenshipstatus;

  instance SAD_ADM_APPL:Setup:ApplicationDefaults &ApplicationDefaults;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsField &ResultsField;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsCollection
&ResultsCollection;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsField &InstitutionField;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsField &CareerField;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsField &ProgramField;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsField &PlanField;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsField &CountryField;
  instance SCC_FILE_PARSER:MODEL:Results:ResultsField
&CitizenshipstatusField;

end-class;

method ApplicationCenterDefault

  %Super = create SCC_FILE_PARSER:UTIL:FieldCalculationAbstract();
  &ApplicationDefaults = create SAD_ADM_APPL:Setup:ApplicationDefaults();

end-method;

method calculateValue
  /* &ResultsFieldIn as SCC_FILE_PARSER:MODEL:Results:ResultsField, */
  /* &ResultsCollectionIn as SCC_FILE_PARSER:MODEL:Results:
ResultsCollection */
  /* Returns Any */
  /* Extends/implements
SCC_FILE_PARSER:UTIL:FieldCalculationAbstract.CalculateValue */
```

```

    Local string &ApplicationCenter;

    &ResultsCollection = &ResultsCollectionIn;
    &ResultsField = &ResultsFieldIn;

    %This.GetFileData();

    try

        &ApplicationCenter = &ApplicationDefaults.getApplicationCenter(
&Institution, &Career, &Program, &Plan, &Country, &Citizenshipstatus);
        catch Exception &exception
            Local string &strParm = &Country | "," | &Citizenshipstatus;
            throw create SCC_FILE_PARSER:UTIL:
Exception:FileParserException(14015, 648,
"Message Not found - problem with App Center API",
&Institution, &Career, &Program, &Plan, &strParm);
        end-try;

        Return &ApplicationCenter;

    end-method;

method GetFileData

    If &InstitutionField = Null Then
        %This.GetFieldReferences();
    End-If;

    &Institution = "";
    If &InstitutionField <> Null Then
        &Institution = &InstitutionField.FieldValue;
    End-If;

    &Career = "";
    If &CareerField <> Null Then
        &Career = &CareerField.FieldValue;
    End-If;

    &Program = "";
    If &ProgramField <> Null Then
        &Program = &ProgramField.FieldValue;
    End-If;

    &Plan = "";
    If &PlanField <> Null Then
        &Plan = &PlanField.FieldValue;
    End-If;

    &Country = "";
    If &CountryField <> Null Then
        &Country = &CountryField.FieldValue;
    End-If;

    &Citizenshipstatus = "";
    If &CitizenshipstatusField <> Null Then
        &Citizenshipstatus = &CitizenshipstatusField.FieldValue;
    End-If;

end-method;

method GetFieldReferences

    Local integer &SegmentNbr;
    Local integer &RowNbr = 1;

    Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SCC_STG_CITZN;
    Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SCC_STG_STD_CAR;
    Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SAD_APL_DAT_STG;

```

```

Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SAD_APL_PRG_STG;
Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SAD_APL_PLN_STG;
&SegmentNbr = &ResultsField.ResultsRecord.SegmentNbr;

&obj_SCC_STG_CITZN = &ResultsCollection.
GetResultsRecord(&SegmentNbr, "SCC_STG_CITZN", &RowNbr);
&obj_SCC_STG_STD_CAR = &ResultsCollection.
GetResultsRecord(&SegmentNbr, "SCC_STG_STD_CAR", &RowNbr);
&obj_SAD_APL_DAT_STG = &ResultsCollection.
GetResultsRecord(&SegmentNbr, "SAD_APL_DAT_STG", &RowNbr);
&obj_SAD_APL_PRG_STG = &ResultsCollection.
GetResultsRecord(&SegmentNbr, "SAD_APL_PRG_STG", &RowNbr);
&obj_SAD_APL_PLN_STG = &ResultsCollection.
GetResultsRecord(&SegmentNbr, "SAD_APL_PLN_STG", &RowNbr);

If &obj_SCC_STG_CITZN <> Null Then
    &CountryField = &obj_SCC_STG_CITZN.GetResultsField("COUNTRY");
    &CitizenshipstatusField = &obj_SCC_STG_CITZN.
GetResultsField("CITIZENSHIP_STATUS");
End-If;

If &obj_SCC_STG_STD_CAR <> Null Then
    &CareerField = &obj_SCC_STG_STD_CAR.GetResultsField("ACAD_CAREER");
End-If;

If &obj_SAD_APL_DAT_STG <> Null Then
    &InstitutionField = &obj_SAD_APL_DAT_STG.
GetResultsField("INSTITUTION");
End-If;

If &obj_SAD_APL_PRG_STG <> Null Then
    &ProgramField = &obj_SAD_APL_PRG_STG.GetResultsField("ACAD_PROG");
End-If;

If &obj_SAD_APL_PLN_STG <> Null Then
    &PlanField = &obj_SAD_APL_PLN_STG.GetResultsField("ACAD_PLAN");
End-If;

end-method;

```


Managing PeopleSoft Prospect/Admissions Data Load Transactions

Related Documentation for Prospect/Admissions Data Load Transactions

For documentation related to Prospect/Admissions Data Load Transactions, see:

- The product documentation for *PeopleTools: Integration Broker*.
- The documentation for these Campus Community features:
 - "Understanding Entity Registry" (Campus Community Fundamentals)
 - "Understanding CTM" (Campus Community Fundamentals)
 - "Understanding the File Parser Process" (Campus Community Fundamentals)
 - "Understanding Common Attribute Framework" (Campus Community Fundamentals)

Understanding Prospect/Admission Data Load Transactions

Prospect/Admissions Data Load (PDL) is an innovative tool that utilizes existing architecture and functionality including Constituent Transaction Management (CTM), the File Parser, Entity Registry, 3C Events and Triggers and the Common Attribute Framework. It is designed to provide new structures that will allow academic institutions to define and map almost any external file containing data that requires staging, search/match processing, and posting to production records. This could include but is not limited to admissions test scores, prospects, placement exams, internal academic knowledge test results, and so on.

The Prospect/Admissions Data Load represents a common approach for capturing externally provided test data and other data that:

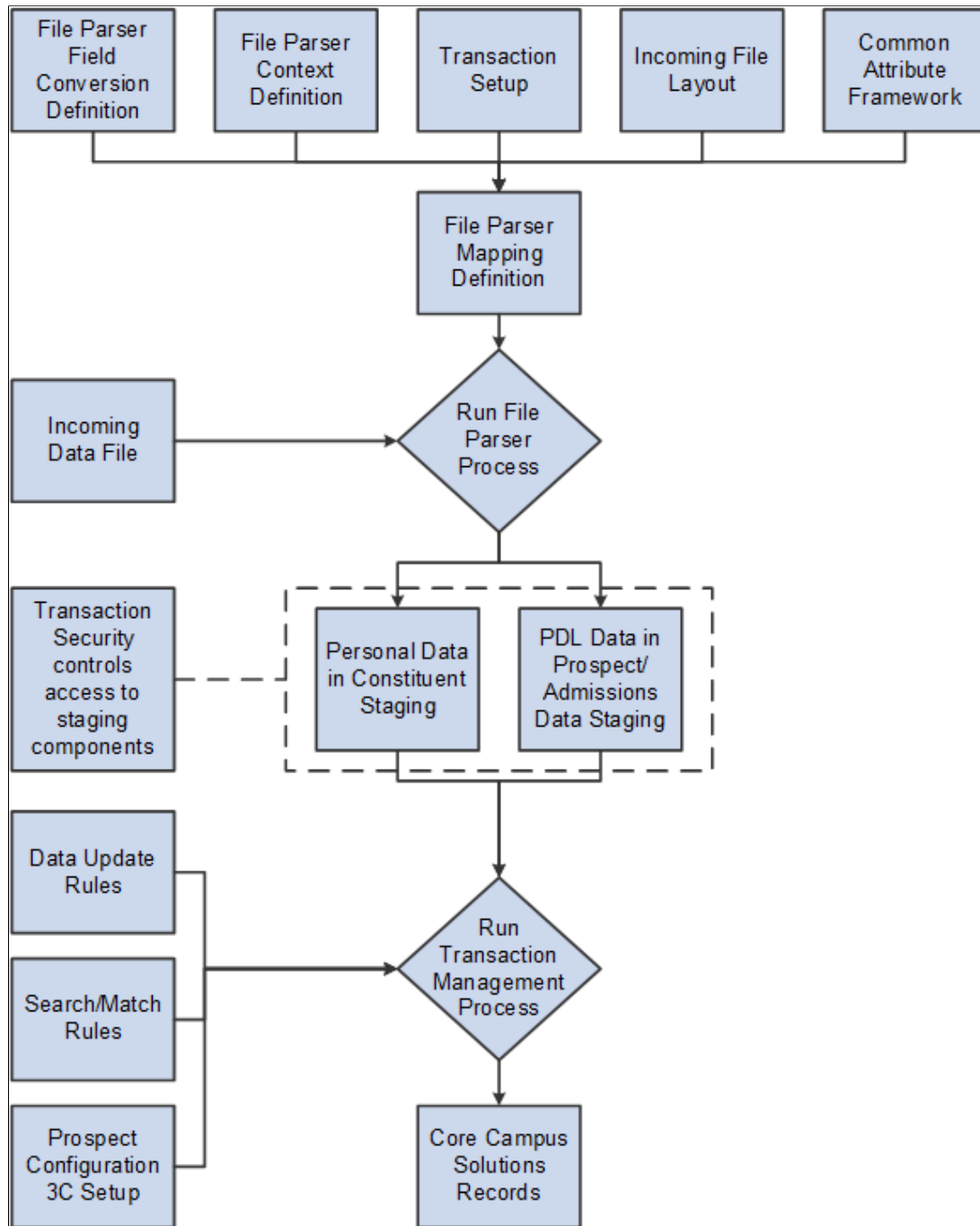
- Utilizes the CTM data structures and staging components to capture bio/demo data.
- Utilizes the existing CTM Transaction Setup component and Transaction Management process to enable staging and posting of data.
- Utilizes the existing CTM Data Update Rules feature to enable the user to determine how existing constituent data should be updated.
- Provides ability to create prospects via appropriate mapping definitions.

- Provides new application packages to post test scores, prospect data and other data to Campus Solutions as part of the existing Transaction Management process.
- Utilizes the existing Enterprise Integration Points (EIPs) to exchange data between Campus Solutions and PeopleSoft CRM for test scores, prospect data, academic interests, education data and extracurricular activities.
- Utilizes the Common Attribute Framework to extend the existing prospect and test score records enabling academic institutions to store additional test and prospect data not supported in the current structures.
- Provides a security structure for the staging components to restrict access to only those transactions a user can process.

PDL represents an important step towards ending your reliance on Campus Solutions continuous support for various existing test score load processes. Working closely with the HEUG Admissions Product Advisory Group, we intend to begin the evolutionary migration from currently supported test scores to this new form of processing. It is our intention that this new paradigm will be used for loading all currently supported admissions related test score and data loads. PDL will introduce initial file mapping definition templates for currently supported test score loads which will serve as the basis for load procedures. It is important to recognize that, as each new template for a test load is delivered; academic institutions will acquire the ability for responding to layout changes as announced by various test agencies.

Important! Campus Solutions will no longer update the individual test load after its related PDL template has been delivered.

This diagram illustrates the prospect/admissions data flow.



The steps for setting up, loading and posting prospect or admissions data from an external file are as follows:

Steps	More Information
<p>1. Define a data update rule based on the incoming data to be used on the Transaction Setup component.</p> <p>2. Define a transaction code on the Transaction Setup component to be used on the file mapping definition.</p> <p>3. Update transaction security to add the transaction code for the appropriate users so that these users can view the data in the Prospect/Admissions Staging and Constituent Staging components under the Student Recruiting, Prospect/Admissions Data Mgmt menu.</p> <p>4. Update the appropriate Common Attribute Framework record context via the Record Context component to add or remove common attributes for additional data you want to store for your prospects or test takers.</p>	<p>See Configuring PDL Setup</p> <p>See "Setting Up CTM Transaction Security" (Campus Community Fundamentals)</p>
<p>5. Optional: Assign a 3C Event ID to your transaction code on the 3C Event ID Setup page to assign 3Cs to each person record processed. Also, review and modify the Prospect Setup page if you are using a calculated field to assign a recruiting center to an incoming prospect record.</p>	<p>See Setting Up Prospect Configuration</p>
<p>6. Define a File Parser field conversion profile for your external file, if needed, to convert external field values to internal field values.</p> <p>7. Define a File Parser context definition for your external file to indicate the staging records you will populate in the proper parent-child relationship.</p> <p>8. Define a File Parser file mapping definition to map the fields on the external file to the records defined on the context definition.</p> <p>9. Run the File Parser process to load the external file to the staging records based on the file mapping definition.</p>	<p>See Setting Up File Parser for PDL</p>
<p>10. Run the Transaction Management process for your transaction code to perform search/match and post staged data.</p>	<p>See the discussion on Transaction Management process in the Campus Community – Constituent Transaction Management documentation.</p>
<p>11. Use the Constituent Staging and Prospect/Admissions Staging components to review records that were not posted based on search/match rules or validation logic. Determine if new record should be created or existing record updated. Resolve any validation errors.</p>	<p>See Reviewing and Editing Staged PDL Transactions</p> <p>See the discussion on Constituent Staging component in the Campus Community – Constituent Transaction Management documentation.</p>

Steps	More Information
12. Manually post individual records or run the Transaction Management process again to post remaining records that were reviewed on the Constituent Staging and Prospect/Admissions Staging components.	<p>For manually posting individual records:</p> <p>See the discussion on Constituent Staging component in the Campus Community – Constituent Transaction Management documentation.</p> <p>For posting in batch:</p> <p>See Posting PDL Transactions</p>

CRM for Higher Ed EIPs and Prospect/Admissions Data Transactions

Enterprise Integration Points (EIPs) enable your institution to exchange data between CS and CRM. EIPs publish data either whenever data updating happens for the given entities of the EIPs or when the user requests data. This data can be created, updated, or deleted through various channels like components, component interfaces, and batch processes.

The system can publish the following EIPs when a PDL transaction is posted via the Transaction Management process:

- SAD_ADM_PRSPCT_DATA_SYNC
- SAD_TEST_SCORES_SYNC
- SAD_ADM_INTEREST_SYNC
- SSR_EXTRACUR_ACTVTY_SYNC
- SAD_EXT_ACAD_DATA_SYNC
- SCC_PERSON_SYNC

Note: If EIPs are active, they are automatically published when you run the Transaction Management process.

See also:

- "Understanding CRM for Higher Ed" (Campus Solutions Application Fundamentals)
- CRM for Higher Education Developer's Guide in My Oracle Support (ID 1982671.1)

Entity Registry and PDL Transactions

The entities for all core data records within the constituent and prospect/admissions data areas needed for PDL transactions are delivered with the system within the Entity Registry component.

Delivered Entities Related to Prospect/Admissions Data

The following entities are delivered for the prospect/admissions staging records and matching production records:

Entity Name	Staging Record Names	Production Record Names
Prospect/Admissions Data Load	SAD_PDL_HDR_STG	**SAD_PDL_HDR_WRK
Prospect Career	SAD_PRS_CAR_STG	ADM_PRSPCT_CAR
Prospect Program	SAD_PRS_PRG_STG	ADM_PRSPCT_PROG
Prospect Plan	SAD_PRS_PLN_STG	ADM_PRSPCT_PLAN
Prospect Sub-Plan	SAD_PRS_SBP_STG	ADM_PRSPCT_SBPL
Prospect Recruiting Category	SAD_PRS_RCR_STG	PRSPCT_RCR_CAT
Prospect Recruiter	SAD_PRS_REC_STG	PRSPCT_RECRTER
Prospect CAF	SAD_STG_PRS_CAF	SAD_PRSPCT_CAF
*Test Score	SCC_STG_TEST	STDNT_TEST
*Test Score Component	SCC_STG_TESTCMP	STDNT_TEST_COMP
*Test Date	SCC_STG_TESTDT	SAD_TESTDT
*Test CAF	SAD_STG_TST_CAF	SAD_TESTDT_CAF
*Academic History	SCC_STG_ACADHST	ACAD_HISTORY
*External Academic Data	SCC_STG_EXACDDT	EXT_ACAD_DATA
*External Education Comment	SCC_STG_EXEDCOM	SAD_EXT_ED_COM
*External Academic Summary	SCC_STG_EXACDSM	EXT_ACAD_SUM
*External Academic Subject	SCC_STG_EXACDSB	EXT_ACAD_SUBJ

Entity Name	Staging Record Names	Production Record Names
*External Academic Data (CAN)	SCC_STG_CANEXAC	CAN_EXT_ACAD_DA
*External Course	SCC_STG_EXTCRS	EXT_COURSE
*External Course Communication	SCC_STG_CRSCOM	SAD_EXT_CRS_COM
*External Course Grade	SCC_STG_CRSGRD	SAD_EXT_CRS_GRD
*External Degree	SCC_STG_EXTDEGR	EXT_DEGREE
*Academic Interests Header	SCC_STG_ADMIHD	ADM_INTRST_HDR
*Academic Interests	SCC_STG_ADMINT	ADM_INTERESTS
*General Materials	SAD_STG_GEN_MAT	GENL_MATERIALS
*General Materials Attachment	SAD_STG_GNMTATT	GENL_MAT_ATTACH

*Considered Constituent Data but appears on Prospect/Admissions Staging

**Work record has no significance other than to act as a production record placeholder within the Entity Registry

A query group, named PROS ADM DATA LOAD, has been added for PDL. This new query group is added to QUERY_TREE_ADM. Use the Query Access Manager page to view this query group.

See Also

the product documentation for *PeopleTools: Query*

Configuring PDL Setup

Before you deploy PDL and start loading data from external sources, you must set up the following:

- Data Update Rules Entry
- CTM Transaction Setup
- Transaction Security
- Common Attribute Framework
- Prospect Configuration

- File Parser

This section discusses:

- [Setting Up Data Update Rules Entry](#)
- [Setting Up Transaction](#)
- [Setting Up CTM Transaction Security](#)
- [Understanding the Entity Registry Impacts](#)
- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

See also:

- [Setting Up Prospect Configuration](#)
- [Setting Up File Parser for PDL](#)

Setting Up Data Update Rules Entry

Access the Data Update Rule Entry page (**Set Up SACR >System Administration >Utilities >Constituent Transaction Mgmt >Data Update Rule Entry**).

Create a data update rule based on the incoming constituent data from your file layout. Determine if/how the constituent data should be updated if it already exists for the person in the core campus records.

Academic institutions require different rules for updating constituent data based on a transaction and the affiliation the institution has with the constituent. For example, you may define one rule based on the incoming data from TOEFL and a different rule based on the incoming data from PTE as the data you receive from each testing agency differs. Additionally, you may want to override the TOEFL rule if the constituent is already an applicant. The Data Update Rule Entry component allows this flexibility. The system uses these rules when it posts a transaction.

To be consistent with existing CTM processes that update this data, the following table describes the data update rules for these entities:

Entity	Rules
Academic Interests	<p>If data exists on ADM_INTRST_HDR for an existing EMPLID and ACAD_CAREER and the max ADM_INTRST_HDR.EFFDT is not equal to %Date, a new row is inserted with EFFDT = %Date. Rows are inserted into ADM_INTERESTS for each academic interest populated on SCC_STG_ADMINT. PRIORITY is populated based on ADM_INTRST_HDR.USE_PRIORITY.</p> <p>If data exists on ADM_INTRST_HDR for an existing EMPLID and ACAD_CAREER and the max ADM_INTRST_HDR.EFFDT is equal to %Date, a row is not inserted into ADM_INTRST_HDR. Rows will be inserted into ADM_INTERESTS only where SCC_STG_ADMINT.EXT_SUBJECT_AREA does not exist on ADM_INTERESTS for the current effective date. If ADM_INTRST_HDR.USE_PRIORITY is Y, the max ADM_INTEREST.PRIORITY is determined and incremented to the next number when new rows are inserted.</p>

Entity	Rules
External Academic Data	<p>A new data number (EXT_DATA_NBR) is inserted to EXT_ACAD_DATA if the EXT_ORG_ID on the staging record SCC_STG_ACADHST exists on the core record ACAD_HISTORY. The max EXT_DATA_NBR existing on EXT_ACAD_DATA is determined and incremented to the next number on insert.</p> <p>All child records are populated with the same EXT_DATA_NBR that is inserted on EXT_ACAD_DATA if the field exists on the child record.</p> <p>Exception: For the record EXT_DEGREE, if data exists on EXT_DEGREE where DESCR, DEGREE_DT, DEGREE_STATUS and LS_DATA_SOURCE = data from staging record (SCC_STG_EXTDEGR), a new row is not inserted.</p>
General Materials	<p>A new record is always inserted.</p> <p>The max GENL_MATL_NBR is determined and new incremented to the next number when new rows are inserted.</p>
Test Score	<p>If SCC_STG_TEST.TEST_ID does not exist on STDNT_TEST for the EMPLID, a new row is inserted along with any child rows (STDNT_TEST_COMP).</p> <p>If the following elements on STDNT_TEST_COMP match the elements on the staging record SCC_STG_TESTCMP, update Score, Percentile and Date Loaded regardless of the previous score reported: EMPLID, TEST_ID, TEST_COMP, TEST_DT and DATA_SOURCE.</p> <p>If there is not an existing row on STDNT_TEST_COMP that matches on EMPLID, TEST_ID, TEST_COMP, TEST_DT, DATA_SOURCE, a new row is inserted.</p>

From September 2020, when processing ACT CSV files make sure these entities are listed and activated in Default Update Rule (DEFAULT_UPDATE_RULE):

- Test ID ACT Assessment (SCC_STG_TESTDT)
- Test Score (SCC_STG_TEST)
- Test Score Component (SCC_STG_TESTCMP)

If these entities aren't included in Default Update Rule, then:

1. Go to **Set Up SACR > System Administration > Entity > Entity Registry**.
2. Search for each entity.
 - Test ID ACT Assessment (SCC_STG_TESTDT)
 - Test Score (SCC_STG_TEST)
 - Test Score Component (SCC_STG_TESTCMP)
3. For each entity, click it to access its Entity Registry page.
4. Select *Apply Data Update Rule*.
5. From Actions, select *Sync Entity*.

6. Click *Save*, then repeat steps 2 to 6 for the other entities.
7. Go to **Set Up SACR >System Administration >Utilities >Constituent Transaction Mgmt >Data Update Rule Entry**, then click *Search*.
8. From the results, select *Default Update Rule*.
9. Click *Refresh*. You should see a message that the entities have been added.
10. While you're on the Data Update Rule Entry page, locate Personal Details, Test ID ACT Assessment, Test Score and Test Score Component.
11. For each entity, in Update Action, select *Update/Insert*.
12. Save your changes.

Setting Up Transaction

You must define a transaction for each PDL transaction you will be loading. For each prospect or test score template Oracle delivers, transaction codes are also delivered.

This is an example of a delivered transaction code (1 of 2).

The screenshot shows the 'Transaction Setup' form with the following fields and options:

- Transaction:** SAD_PTE
- *Transaction Name:** PTE Test Score Load
- Transaction Description:** PTE Test Score Load
- *Transaction Status:** Active (dropdown menu)
- *Data Update Rule:** DEFAULT_UPDATE_RULE (with a search icon)
- Transaction Options:**
 - ☐ Online Transaction
 - Process Search/Match:**
 - ☒ Batch
 - ☐ Realtime

This is an example of a delivered transaction code (2 of 2).

Transaction Handler	
*Root Package ID:	SAD_PDL_PROCESS
*Path:	TRANSACTION
*Application Class ID:	DataLoadTransaction
Transaction Status and Date	
*Staged Record Name:	SAD_PDL_HDR_STG Common Data Header record.
Constituent Handler	
*Root Package ID:	SCC_SL_TRANSACTION
*Path:	INTFC
*Application Class ID:	DefaultConstituent
Partition Data	
<input type="radio"/> By Constituent <input checked="" type="radio"/> By Transaction	
Transaction Data Launch View	
Menu Name:	SAD_PDL_DATA_STAGE Prospect Data Load Menu
Menu Bar Name:	USE Use
Menu Item Name:	SAD_PDL_DATA_STG Prospect/Admissions Staging
Menu Page Name:	SAD_PDL_ACAD_INFO Constituent Summary Page

All PDL transactions should be set up with the Online Transaction check box cleared which sets the Process Search/Match option to *Batch* automatically.

The following table lists the delivered transaction handler values for Prospect/Admissions Data Load transactions. Use these values when defining a transaction handler for any new PDL transaction you may define.

Root Package ID	Path	Application Class ID
SAD_PDL_PROCESS	TRANSACTION	DataLoadTransaction

The staging record name for PDL Transaction Status and Date should be set to SAD_PDL_HDR_STG. This record stores the transaction status and transaction status date value for PDL transactions. You should always use this value when defining any new PDL transaction.

The following table lists the delivered transaction handler values for processing the constituent data that is loaded with your PDL transaction. Use these values when defining a constituent handler for any new PDL transaction you define.

Root Package ID	Path	Application Class ID
SCC_SL_TRANSACTION	INTFC	DefaultConstituent

All PDL transactions should be set to Partition by Transaction which creates one transaction record for each constituent record.

The following table lists the delivered transaction data launch view settings for PDL transactions. You should always use these values when defining the transaction data launch view settings for any new PDL transaction you may create.

Menu Name	Menu Bar Name	Menu Item Name	Menu Page Name
SAD_PDL_DATA_STAGE	USE	SAD_PDL_DATA_STG	SAD_PDL_ACAD_INFO

On the Search/Match Setup tab, define the search parameter, search result code and action to take for each search level that you want to use when processing your PDL transaction.

Setting Up CTM Transaction Security

Access the CTM Transaction Security page (**Set Up SACR >Security >Secure Student Administration >User ID >CTM Transaction Security**).

This example illustrates the fields and controls on the CTM Transaction Security page.

The screenshot shows the 'CTM Transaction Security' page for user ID SATRN01. It displays a table with the following columns: *Transaction, Description, and Access Code. The table lists five transactions: SAD_GMAT (GMAT Test Score Load), SAD_GRE (GRE Test Score Load), SAD_CFA (CFA Prospect Load), SAD_PTE (PTE Test Score Load), and SAD_IELTS (IELTS Test Score Load). Each transaction has a 'Read/Write' access code, and the first row (SAD_GMAT) has an 'All Access' button. Navigation controls at the top include 'Find', 'First', '1-5 of 5', and 'Last'.

*Transaction	Description	Access Code
SAD_GMAT	GMAT Test Score Load	Read/Write All Access
SAD_GRE	GRE Test Score Load	Read/Write
SAD_CFA	CFA Prospect Load	Read/Write
SAD_PTE	PTE Test Score Load	Read/Write
SAD_IELTS	IELTS Test Score Load	Read/Write

The CTM Transaction Security page controls access to the Prospect/Admissions Staging and Constituent Staging components under the Student Recruiting, Prospect/Admissions Data Mgmt menu.

For more information about the CTM Transaction Security page:

See "Setting Up CTM Transaction Security" (Campus Community Fundamentals)

Understanding the Entity Registry Impacts

The system automatically creates an entity for a new test ID that you add through the Test Tables component.

This is an example of the entity registry record that the system creates for the PTE test:

This image illustrates an Entity Registry example for PTE.

Entity Registry

Entity Configuration

Entity ID:

SCC_ENTITY_20130401102204

Name:

Test ID Pearson Test of Englis

Status:

Active

Entity Type

Staged Entity

Description:

PTE : Pearson Test of English

AppClass:

Prod Record:

STDNT_TEST

Stage Record:

SCC_STG_TEST

Element (XML):

SAD_PTE

☐ Apply Data Update Rule

Action:

Children

Personalize | Find |

First 1 of 1 Last

Order	*Entity Name	Status	Embed	*Min	*Max	Element Wrapper (XML)	View	
10	Test Score Componen	Active		0	0		View	<div>+ -</div>

The system will assign a unique entity ID to each test ID that you set up. The Test Tables page will also display this entity ID. The name assigned for each Test ID Entity will use the following name convention <Test ID> <Description from Test Table>. The Description for each Test ID Entity will use the following naming convention <Value entered for Test ID>: <Description from Test Table>.

See [Defining External Tests](#)

Setting Up Common Attribute Framework

PDL is leveraging the Common Attribute Framework to enable you to store additional data loaded from external data sources for test scores and prospects. Examples have been delivered but you may choose to add additional attributes for the data you are loading.

For extending prospect career data, a record context has been delivered for ADM_PRSPCT_CAR and its corresponding staging record SAD_PRS_CAR_STG.

This example illustrates the record context for prospect career.

For additional data you want to store for your prospect, define a common attribute and add it to the ADM_PRSPCT_CAR record context.

To add common attributes to the ADM_PRSPCT_CAR record context:

1. Access the Record Context search page (**Set Up SACR >Common Definitions >Common Attributes Setup >Record Context**).
2. Enter Record (Table) Name = *ADM_PRSPCT_CAR*.
3. Click Search.
4. In the Attributes section, add a row and populate the Common Attribute field for each common attribute. Add a new row for each common attribute.

5. Click Save.

Note: The “Delivered PDL Templates” section lists the common attributes delivered for each template. The CFA attributes have already been added to ADM_PRSPCT_CAR. Add the remaining attributes to ADM_PRSPCT_CAR for the templates you are planning to use.

See [Delivered PDL Templates](#)

To allow you to store additional test score data by test date, a record context has been delivered for SAD_TESTDT and its corresponding staging record SCC_STG_TESTDT.

This example illustrates the record context for test date.

The screenshot displays the 'Record Context' configuration page. The 'Record (Table) Name' is set to 'SAD_TESTDT'. The '*Description' is 'Test Score Loads'. The '*Attribute Record' is 'SAD_TESTDT_CAF' with a search icon and the text 'Prod Test Score Attrb'. The 'Override Prompt Table' is 'SAD_TSTIDCAF_VW' with a search icon and the text 'Test score attribute prompt'. The 'Extend to staging record' checkbox is checked. The 'Staging Record' is 'SCC_STG_TESTDT' with a search icon and the text 'Test Component by Date'. The 'Staging Attribute Record' is 'SAD_STG_TST_CAF' with a search icon and the text 'Stg Test Score Attrb'. The 'Entity Name' is 'Test CAF' with a search icon. The 'Attribute Filter Class' is 'SAD_PDL_PROCESS:CAF_Filters:PDL_Field_Filter' with a search icon. Below these fields are two sections: 'Attribute Display Type' with radio buttons for 'Inline Subpage' (selected) and 'Secondary Page'; and 'Copy Attributes from' with a search icon and a 'Copy' button. At the bottom is the 'Attributes' section with a header bar containing 'Find | View All', 'First', '1 of 11', and 'Last'. The attributes list includes: '*Attribute Sequence' set to '1', 'Status' set to 'Active' with a dropdown arrow, '+', and '-' buttons; '*Common Attribute' set to 'IELTS_DOWNLOADID' with a search icon and the text 'DownloadID'; and checkboxes for 'Required' and 'Repeatable'. A blue bar at the bottom of the attributes section is labeled 'Entity Associations'.

For additional data you want to store for your specific test, define a common attribute and add it to the SAD_TESTDT record context. To add common attributes to the SAD_TESTDT record context:

1. Access the Record Context search page (**Set Up SACR >Common Definitions >Common Attributes Setup >Record Context**).
2. Enter Record (Table) Name = *SAD_TESTDT*.
3. Click Search.

4. In the Attributes section, add a row and populate the Common Attribute field for each common attribute. Add a new row for each common attribute.

5. Click Save.

Note: The “Delivered PDL Templates” section lists the common attributes delivered for each template. The IELTS and PTE attributes have already been added to SAD_TESTDT. Add the remaining attributes to SAD_TESTDT for the templates you are planning to use.

See [Delivered PDL Templates](#)

Setting Up Filtering for Common Attributes

For each of the attributes you have added to the record context for SAD_TESTDT, you need to add the Test ID that corresponds to the attribute. Doing so will then filter those attributes in the field search results for that Test ID in the:

- Test Results group box of the Prospect/Admissions Staging - Academic Information page.
- Test Results pages.

This is an example of the Test Results group box when the user clicks the lookup button for Field in Additional Test Values:

This image illustrates an example of filtering based on Test ID in the Academic Information page.

***Test ID:** IELTS International English Language

Last Updated On: 10/10/2013 7:59:48AM

Last Updated By: SAMPLE

Test Component	Test Score
1 LISNG	9.00
2 OVRLL	8.00
3 READ	7.00
4 SPKNG	8.00
5 WR	7.00

Look Up Field

Test ID: IELTS

Common Attribute: begins with

Look Up **Clear** **Cancel** [Basic Lookup](#)

Search Results

View 100 First 1-6 of 6 Last

Common Attribute

- IELTS_CANDIDATEID
- IELTS_CANDIDATENUMBR
- IELTS_CENTRENUMBER
- IELTS_DOWNLOADID
- IELTS_PARTNO
- IELTS_TRFNUMBER

Additional Test Data

***Test Date:** 03/11/2012

Additional Test Values

Field	Text - 2
1 IELTS_DOWNLOADID	
2 IELTS_PARTNO	
3 IELTS_CENTRENUMBER	
4 IELTS_CANDIDATEID	
5 IELTS_TRFNUMBER	

This is an example of the Test Results page when the user clicks the lookup button for Field in Additional Test Values:

This image illustrates an example of filtering based on Test ID in the Test Results page.

The screenshot shows the 'Test Results' page in PeopleSoft. The page header includes the user name 'William MacHenry' and the session ID 'ADIELTS100'. The main section is titled 'Tests' and shows a search for 'IELTS' (International English Language). Below this, there are fields for 'Test Date', 'Data Source', and 'Acad Level'. A 'Test Components' table is visible, listing components like 'OVRLL', 'READ', and 'WR' with their respective scores and test dates. A 'Look Up Field' dialog box is open, showing a search for 'IELTS' with the common attribute 'begins with'. The dialog box also displays a list of search results, including 'IELTS_CANDIDATEID', 'IELTS_CANDIDATENUMBR', 'IELTS_CENTRENUMBER', 'IELTS_DOWNLOADID', 'IELTS_PARTNO', and 'IELTS_TRFNUMBER'. The 'Look Up' button is highlighted.

For more information on Academic Information page:

See [Reviewing and Editing Staged PDL Transactions](#)

For more information on Test Results page:

See [Tracking Supporting Information for Prospects and Applicants](#)

You must perform the following steps in order to achieve this behavior of filtering based on Test ID:

1. Navigate to the Record Context search page (**Set Up SACR >Common Definitions >Common Attributes Setup >Record Context**).
2. Enter *SAD_TESTDT* in the Record (Table) Name search field.
3. Click Search.
4. The Record Context page should look like this:

This example illustrates the record context for SAD_TESTDT.

The screenshot shows the 'Record Context' tab for the record SAD_TESTDT. The configuration includes:

- Record (Table) Name:** SAD_TESTDT
- *Description:** Test Score Loads
- *Attribute Record:** SAD_TESTDT_CAF (Prod Test Score Attrb)
- Override Prompt Table:** SAD_TSTIDCAF_VW (Test score attribute prompt)
- ☒ **Extend to staging record**
- Staging Record:** SCC_STG_TESTDT (Test Component by Date)
- Staging Attribute Record:** SAD_STG_TST_CAF (Stg Test Score Attrb)
- Entity Name:** Test CAF
- Attribute Filter Class:** SAD_PDL_PROCESS:CAF_Filters:PDL_Field_Filter
- Attribute Display Type:** ☒ Inline Subpage, ☐ Secondary Page
- Copy Attributes from:** (Empty field with a 'Copy' button)
- Attributes Section:**
 - *Attribute Sequence: 1
 - Status: Active
 - *Common Attribute: IELTS_DOWNLOADID (DownloadID)
 - ☐ Required, ☐ Repeatable
 - Entity Associations** (Expandable group box)

- Expand the Entity Associations group box. The group box should look like this:

This example illustrates the Entity Associations group box.

The screenshot shows the 'Entity Associations' group box expanded, displaying a table with the following structure:

Entity Associations		Find View All	First	1 of 1	Last
	*Entity Name				
1	<input type="text"/>				

- For each of the Attributes defined to the record SAD_TESTDT, add the Entity Name that corresponds to the value in the Common Attribute field. Entering Test ID in the Entity Name field and clicking the lookup icon displays the results as shown in the following graphic:

This example illustrates the Lookup results for the Entity Name field.

Look Up Entity ID

Entity ID: begins with

Entity Name: begins with

Test ID

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100First1-31 of 31Last

Entity Name	Entity Description
Test ID ACT Assessment	ACT : ACT Assessment
Test ID Advanced Placement	AP : Advanced Placement
Test ID American Dental Associ	ADA : American Dental Association
Test ID Candidate Referral Serv	CRS : Candidate Referral Service
Test ID College Level Examinat	CLEP : College Level Examination Prg
Test ID Dental Admission Test	DAT : Dental Admission Test
Test ID Dutch as second langua	NT2 : Dutch as second language
Test ID Educational Opportunit	EOS : Educational Opportunity Svc
Test ID GMASS	GMASS : GMASS
Test ID Grad Management Admiss	GMAT : Grad Management Admission Test
Test ID Graduate Record Exam	GRE : Graduate Record Exam
Test ID International Baccalau	IB : International Baccalaureate
Test ID International English	IELTS : International English Language
Test ID Law School Admission T	LSAT : Law School Admission Test
Test ID Medical College Admiss	MCAT : Medical College Admission Test
Test ID Ministry of Education	MOE : Ministry of Education - NCEA
Test ID New South Wales	UAC : New South Wales
Test ID Pearson Test of Enqlis	PTE : Pearson Test of English
Test ID Queensland Tertiary Ad	QTAC : Queensland Tertiary Admission
Test ID Scholastic Aptitude Te	SATOL : Scholastic Aptitude Test (Old)
Test ID Scholastic Assessment	SATII : Scholastic Assessment Test II
Test ID Scholastic Assessment	SAT I : Scholastic Assessment Test I
Test ID Search PSAT/NMSQT Maj	PSATS : Search PSAT/NMSQT Major
Test ID Search Advanced Placem	APS : Search Advanced Placement
Test ID Search Scholastic Asse	SATS : Search Scholastic Assessment I

- For all those attributes prefaced with *IELTS*, add the Entity Name *Test ID International English*:

This example illustrates the Entity Name for IELTS.

Attributes Find | View All First 1 of 11 Last

*Attribute Sequence: Status: Active

*Common Attribute: DownloadID

☐ Required ☐ Repeatable

Entity Associations Find | View All 1 of 1 First 1 of 1 Last

	*Entity Name		
1	<input type="text" value="Test ID International English"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

8. Repeat the above step for the remaining attributes.

Note: Remember to use the correct Entity Name that corresponds to those common attributes.

9. Save your changes. When you save the changes, the system displays this message:

Please run Entity Property Sync process to update corresponding Entity Registry definitions. (14097, 56)

The record context data has changed. To keep corresponding Entity Registry definitions in sync please run the Entity Property Sync process (Home > Setup SACR > System Administration > Entity > Entity Property Sync)

10. In order for these changes to take full effect, you must complete the next steps and run both the Entity Registry Sync and Cache Wipe processes.
11. Navigate to the Entity Property Sync component (**Set Up SACR >System Administration >Entity >Entity Property Sync**).

This example illustrates the Entity Property Sync component (1 of 2).

Entity Property Sync

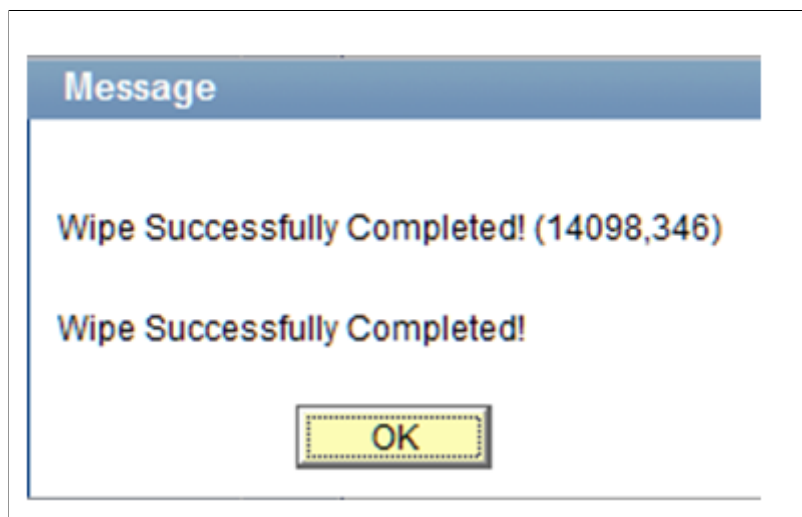
Press the "Sync All Entity Properties" to make sure all the properties on every entity get updated to properly reflect the record objects. The updates you manually have made to the properties will not be reset by this process.

Sync Log		
Entity Name	Last Synced	Log
Academic History	08/29/13 2:17:50PM	Log
Academic Program	12/10/13 12:27:39PM	Log

This example illustrates the Entity Property Sync component (2 of 2).

12. Click the Sync All Entity Properties button.
13. Clicking this button will initiate an Application Engine process that should take 5 - 10 minutes to complete. Clicking the Refresh button will update the status of the Application Engine process (that is, *Queued*, *Processing*, *Success*).
14. Once the process has completed successfully, click the Wipe Entity Cache button. This should take between 3 - 5 minutes to complete. Upon completion, you should see the following message:

This example illustrates the confirmation message for Wipe Entity Cache process.



15. When the Wipe Entity Cache process has completed, you have successfully completed updating the common attributes for test scores.

Note: If common attributes are changed, added or deleted, run the Entity Property Sync process (**Set Up SACR >System Administration >Entity >Entity Property Sync**) to keep the corresponding Entity Registry definitions in sync.

Setting Up Prospect Configuration

To configure the PDL Transactions, use the Prospect Configuration component (SAD_PDL_CONFIG).

This section discusses how to:

- Map online PDL transactions to academic careers.
- Set up prospect defaults for PDL transactions.
- Set up 3C Event IDs to assign for each PDL transaction.

Pages Used to Set Up Prospect Configuration

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Prospect Config	SAD_PDL_TRN_MAP	Set Up SACR >Product Related >Recruiting and Admissions >Prospects >Prospect Configuration >Prospect Config	Map online PDL transactions to academic careers. Note: To be used for future functionality. Do not set up at this time.
Prospect Setup	SAD_PDL_SETUP	Set Up SACR >Product Related >Recruiting and Admissions >Prospects >Prospect Configuration >Prospect Setup	Define how the system should assign a recruiting center to each prospect. The system uses this setup when you use File Parser to load prospects in batch via a calculated field.
3C Event ID Setup	SAD_PDL_3C_SETUP	Set Up SACR >Product Related >Recruiting and Admissions >Prospects >Prospect Configuration >3C Event ID Setup	Optional – Define a 3C Event ID to assign for each transaction code when the transaction is processed.

Mapping Online Prospect/Admissions Data Load Transactions to Academic Careers

Access the Prospect Config page (**Set Up SACR >Product Related >Recruiting and Admissions >Prospects >Prospect Configuration >Prospect Config**).

This example illustrates the fields and controls on the Prospect Config page.

You can enter only online transactions in the Transaction field. PDL does not support online transactions so you should not populate this page.

Setting Up Prospect Defaults for Prospect/Admissions Data Load Transactions

Access the Prospect Setup page (**Set Up SACR >Product Related >Recruiting and Admissions >Prospects >Prospect Configuration >Prospect Setup**).

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

Prospect Config

Prospect Setup



3C Event ID Setup

Academic Institution

PSUNV




PeopleSoft University

Prospect Mapping

Personalize | Find | View All |   First 1-10 of 11 Last

Criteria

Assigned Values

	Career	Description	Program	Description	Plan	Description		
1	BUSN	Graduate Business					+	-
2	GRAD	Graduate					+	-
3	GRAD	Graduate	GLAU	Graduate Liberal Arts Programs	MATH-G	Math Minor - Graduate	+	-
4	GRAD	Graduate	GLAU	Graduate Liberal Arts Programs	TEACH-I	Teaching-MA	+	-
5	UENG	Undergraduate Engineering					+	-
6	UGRD	Undergraduate					+	-
7	UGRD	Undergraduate	FAU	Fine Arts Undergraduate			+	-
8	UGRD	Undergraduate	FAU	Fine Arts Undergraduate	MUS-BA	Music-BA	+	-
9	UGRD	Undergraduate	LAU	Liberal Arts Undergraduate			+	-
10	UGRD	Undergraduate	LAU	Liberal Arts Undergraduate	BIOLBS	Biology (BS)	+	-

This example illustrates the fields and controls on the Prospect Setup page: Assigned Values tab. You can find definitions for the fields and controls later on this page.

Prospect Config

Prospect Setup

3C Event ID Setup

Academic Institution

PSUNV

PeopleSoft University

Prospect Mapping

Personalize | Find | View All | 12 |

First 1-10 of 11 Last

Criteria

Assigned Values

	Recruiting Center	Description	Recruiting Status	Referral Source	Description		
1	BUSN	Graduate Business College	Prospect	GFRM	Graduate Forum		
2	GRAD	Graduate - Central	Prospect	TSCR	Test Scores		
3	GRMT	Graduate Math Department	Prospect	TSCR	Test Scores		
4	GRMT	Graduate Math Department	Prospect	TSCR	Test Scores		
5	UENG	Undergraduate Engineering	Prospect	INQ	Student Inquiry		
6	UGRD	Undergraduate	Prospect	TSCR	Test Scores		
7	UFAU	UGRD Fine Arts	Inquiry	FAIR	College Fair		
8	UMUD	UGRD Music and Dance	Prospect	INQ	Student Inquiry		
9	ULAU	UGRD Liberal Arts	Prospect	TSCR	Test Scores		
10	UGRD	Undergraduate	Prospect	INQ	Student Inquiry		

Ensure that all the academic career, program, and plan combinations for File Parser PDL transactions are mapped to a valid recruiting center on the Prospect Setup page.

Use the Criteria tab to define the selecting criteria — such as academic career, academic program, and academic plan — that will constitute a particular group of prospects. Use the Assigned Values tab to define the recruiting center that the system can assign to the particular prospect group. For batch prospects loaded through File Parser, a calculated field can be built on the file mapping definition to look at this setup to determine the recruiting center to populate.

The system requires a recruiting center to create a prospect. Therefore, you must map each career with a recruiting center on the Prospect Setup page to be used with a calculated field through File Parser unless you define a default recruiting center on the File Parser mapping definition.

Criteria

Field or Control	Description
Career	Enter the career for which you want to assign a recruiting center.
Program	Optionally, enter the program for which you want to assign a recruiting center.
Plan	Optionally, if you have entered a program, enter the plan for which you want to assign a recruiting center.

Note: When determining the recruiting center assignment, the delivered calculated field example uses the following order: academic plan, academic program, and academic career.

Assigned Values

Enter the recruiting center, recruiting status and referral source for the row entered on the Criteria tab.

Setting Up 3C Event IDs for Prospect/Admissions Data Load Transactions

Access the 3C Event ID Setup page (**Set Up SACR >Product Related >Recruiting and Admissions >Prospects >Prospect Configuration >3C Event ID Setup**).

This example illustrates the fields and controls on the 3C Event ID Setup page. You can find definitions for the fields and controls later on this page.

Prospect Config Prospect Setup 3C Event ID Setup			
Academic Institution PSUNV PeopleSoft University			
3C Event ID Mapping			
*Transaction	Description	*Event ID	Description
1 SAD_CFA	CFA Prospect Load	NEWPROP	New Prospect - PROP
2 SAD_IELTS	IELTS Test Score Load	AD_TESTS	Test Score Acknowledgement
3 SAD_PTE	PTE Test Score Load	AD_TESTS	Test Score Acknowledgement

This is an optional setup. If you want to assign a 3C event ID for a specific transaction, set up this page. The 3C event ID will be inserted into the 3C Trigger Results table upon posting the PDL transaction.

Only the event IDs that have the administrative functions GEN (General), PROS (prospect) and PROP (prospect program) are available. Select an event ID for PROP only if you are certain you will be populating prospect program. Define event IDs on the Event Definition page.

See "Defining 3C Engine Events" (Campus Community Fundamentals)

Setting Up File Parser for PDL

Use the Campus Community File Parser utility to load prospect/admissions data from a text file into Campus Solutions.

Before You Begin

Before you begin setting up File Parser to load your external prospect or admissions data, there are a few things that might be helpful to do. You may want to consider doing this with a spreadsheet or data modeling tool:

- Review the external data to determine which staging records and fields will be populated. Utilize the Entity Registry feature to get a clear understanding of the staging table hierarchy.
- Document each record to be populated, the fields within each record that will come from the external data, and which fields need to be populated with default values. Utilize the AAWS Data Mapping and Entity Catalog document or the Entity Registry component's Entity Properties page to view each of the staging records and their associated fields.

- Determine which incoming fields will need to be converted to internal values.
- Document the non-required incoming data elements so you know which records need to have the **Skip if Blank** check box selected for the mapped data element.
- Determine which fields require developing a calculated field. Examples include: **Recruiting Center**, **External Organization ID** and **Degree Description**.

File Parser Setup

File Parser consists of several key components:

- *Field Conversion Definitions* – Identifies external file field values to convert before storing the data in the target staging table.
- *Context Definitions* – Identifies the parent-to-child relationship of the staging tables that will be used to hold the data.
- *File Mapping Definitions* – Associates fields on the external file with the records in the context definition.

Important! Do not modify any of the delivered file mapping definition or file conversion definition templates. Use the copy functionality to create a new version before you make modifications.

Make sure you enter a row for the required constituent (CTM) and Prospect/Admissions staging records on the Context Definition page and the Mapping page of the File Mapping Definition component:

Required for all PDL transactions:

- SCC_STG_CONSTIT. Should be the first record. It is required to set the following fields, even though they are not necessarily required in the record:
 - SUBMITTED - Default to N.
 - SCC_TRANSAC_CD - Default according to transaction setup.
 - SCC_STG_STATUS - Default to LD (Loaded).
 - SCC_STG_STATUS_DT - Default to %Date.
- SCC_SL_TRNMAP (Select the **Force Insert** check box.)
- SCC_STG_NAMES
- SCC_STG_PDE (Select the **Force Insert** check box if no incoming fields are mapped.)
- SCC_STG_PERSSA (Select the **Force Insert** check box if no incoming fields are mapped.)
- SAD_PDL_HDR_STG. It is required to set the following fields, even though they are not necessarily required in the record:
 - SCC_TRANSAC_CD – Default according to transaction setup.
 - SAD_CRM_POST – Default to 1.

- SCC_TRANS_STS – Default to SB (Submitted) or SV (Saved) depending on your business process.
- SCC_TRANS_STS_DT – Default to %Date.

Required if loading prospects:

- SCC_STG_STD_CAR
- SAD_PRS_CAR_STG

Required if loading test scores:

- SCC_STG_TEST
- SCC_STG_TESTCMP – Enter a row on the File Mapping Definition component for each test component.

Warning! When using a file to upload data into the stage records, do not populate the **EMPLID** field with a value that is not already created inside your production database. Doing so will cause the post process to production tables to fail (the EMPLID value passed will not be used to create a new EMPLID). The same is also true for the User ID (**USERID** field). The process will not create a User ID using the value entered in the file.

Use the Field Conversion Definition page to define field values in the external file that must be converted to internal values. Add any additional fields and complete the definition for the fields delivered.

This image shows an example of a field conversion definition.

Field Conversion Definition

Conversion Profile: SAD_CFA
Long Description: Recruiting and Admissions - College Fair Automation

Conversion Fields Find | View All First 4 of 6 Last

*Conversion Field: Ethnicity
Record (Table) Name:
*Unmatched Value Handling: Default Value Default Value:

Conversion Field Value Personalize | Find | View All First 1-4 of 8 Last

	File Value	Internal Value		
1	Asian	ASIAN		
2	Black	BLACK		
3	IndianNative	AMIND		
4	Mexican	HISPA		

See "Setting Up Field Conversion Definitions" (Campus Community Fundamentals).

Use the Context Definition page to add the staging tables that need to be updated when loading data from the external file. Ensure that you enter the correct value for the **Parent Record** field. For Prospect/Admissions Data Load transactions, SCC_STG_CONSTIT must be the first record entered as it is the parent to all records.

This image shows an example of a context definition.

Context Definition Record Tree

*Context Name: SAD_PTE Conversion Definition: [Dropdown]

Staging Table Records: Find | View All First 1 of 18 Last

*Record: SCC_STG_CONSTIT Constituent Sort Order: 10 [+] [-]

Parent Record: [Dropdown] Synchronize Record Fields

Staging Table Fields: Personalize | Find | View: 10 | First 1 of 21 Last

	Field Name	Field Type	*Mapping Action	Visible for Mapping	Value	Field Format	Counter Record Name	Counter Field
1	SCC_TEMP_ID	Number	Unique Counter	<input type="checkbox"/>			SCC_STG_CTRS	SCC_TEMP_ID
2	SUBMITTED	Char	No Default	<input checked="" type="checkbox"/>				
3	USERID	Char	No Default	<input checked="" type="checkbox"/>				
4	EMPLID	Char	No Default	<input checked="" type="checkbox"/>				
5	SCC_TRANSAC_CD	Char	No Default	<input checked="" type="checkbox"/>				
6	BIRTHDATE	Date	No Default	<input checked="" type="checkbox"/>				
7	BIRTHPLACE	Char	No Default	<input checked="" type="checkbox"/>				
8	BIRTHSTATE	Char	No Default	<input checked="" type="checkbox"/>				
9	BIRTHCOUNTRY	Char	No Default	<input checked="" type="checkbox"/>				
10	DT_OF_DEATH	Date	No Default	<input checked="" type="checkbox"/>				
11	SCC_STG_STATUS	Char	No Default	<input checked="" type="checkbox"/>				
12	SCC_STG_STS_DT	Date	No Default	<input checked="" type="checkbox"/>				
13	CREATED_DTTM	DTTM	No Default	<input checked="" type="checkbox"/>				
14	LASTUPDDTTM	DTTM	No Default	<input checked="" type="checkbox"/>				
15	SCC_SUBMITTED_DTTM	DTTM	No Default	<input checked="" type="checkbox"/>				
16	SCC_ROW_ADD_OPRID	Char	Default Value	<input type="checkbox"/>	%OperatorID	[Dropdown]		
17	SCC_ROW_ADD_DTTM	DTTM	Default Value	<input type="checkbox"/>	%DateTime	[Dropdown]		
18	SCC_ROW_UPD_OPRID	Char	Default Value	<input type="checkbox"/>	%OperatorID	[Dropdown]		
19	SCC_ROW_UPD_DTTM	DTTM	Default Value	<input type="checkbox"/>	%DateTime	[Dropdown]		
20	SCC_UID_ADMIN	Char	No Default	<input checked="" type="checkbox"/>				
21	SCC_ADMIN_MODE	Char	No Default	<input checked="" type="checkbox"/>				

See "Setting Up Context Definitions" (Campus Community Fundamentals).

For Prospect/Admissions Data transactions, you must include the following unique counter on the record SCC_STG_CONSTIT: SCC_TEMP_ID: SCC_STG_CTRS.SCC_TEMP_ID.

Use the File Definition page to provide information about the external file.

This image shows an example of a file definition.

File Definition File Layout Mapping Preview Layout Preview Data

Map Name

*Map Name: SAD_PTE_TESTPROSPECT *Status: Active

*Context Definition: SAD_PTE

*File Type: Delimited *Delimiter: Comma *Qualifier: "

Conversion Definition: SAD_PTE

☐ Multiple Row Types

Important! Changing the value in the **Context Definition** field will delete any existing setup on both the File Layout and Mapping tabs. Do not change this value unless you want to start over with any setup you have completed.

Use the File Layout page to define fields from the external file that will be loaded into the staging tables. The fields should be entered in the exact order of the file layout you are loading. In addition, the **Field Type** setting needs to be set to the same field type as that of the field you will be mapping it to. Set field formats as needed for date fields and character fields.

This image shows an example of a file layout.

File Definition | **File Layout** | Mapping | Preview Layout | Preview Data

Map Name: SAD_PTE_TESTPROSPECT

Row Types: Find First 1 of 1 Last

Row Type: SAD_PTE_TESTPROSPECT Staging Table: Load Fields

File Fields: Personalize | Find | View 10 | First 1-40 of 40 Last

	*Sort Order	*File Field Name	Field Number	Field Type	Field Format	Trim	Date Separator	Decimal Position	
1	10	LAST NAME	1	Character		<input type="checkbox"/>			+ -
2	15	LAST NAME SRCH	1	Character	Upper	<input type="checkbox"/>			+ -
3	20	FIRST NAME	2	Character		<input type="checkbox"/>			+ -
4	25	FIRST NAME SRCH	2	Character	Upper	<input type="checkbox"/>			+ -
5	30	MIDDLE NAME	3	Character		<input type="checkbox"/>			+ -
6	40	GENDER	4	Character		<input type="checkbox"/>			+ -
7	50	DATE OF BIRTH	5	Date	DDMMYYYY	<input type="checkbox"/>	-		+ -
8	60	TELEPHONE NUMBER	6	Character		<input type="checkbox"/>			+ -
9	70	ADDRESS LINE 1	7	Character		<input type="checkbox"/>			+ -
10	80	ADDRESS LINE 2	8	Character		<input type="checkbox"/>			+ -
11	90	ADDRESS LINE 3	9	Character		<input type="checkbox"/>			+ -
12	100	CITY	10	Character		<input type="checkbox"/>			+ -
13	110	STATE/PROVINCE/COUNTY	11	Character		<input type="checkbox"/>			+ -
14	120	POSTAL CODE	12	Character		<input type="checkbox"/>			+ -
15	130	COUNTRY OF RESIDENCE	13	Character	Upper	<input type="checkbox"/>			+ -
16	140	COUNTRY OF CITIZENSHIP	14	Character	Upper	<input type="checkbox"/>			+ -
17	150	EMAIL ADDRESS	15	Character		<input type="checkbox"/>			+ -
18	160	REGISTRATION ID	16	Character		<input type="checkbox"/>			+ -
19	170	TEST DATE	17	Date	DDMMYYYY	<input type="checkbox"/>	-		+ -
20	180	SCORES VALID UNTIL	18	Date	DDMMYYYY	<input type="checkbox"/>	-		+ -
21	190	FIRST-TIME TEST TAKER	19	Character		<input type="checkbox"/>			+ -
22	200	OVERALL PERCENTILE	20	Number		<input type="checkbox"/>			+ -
23	210	LISTENING PERCENTILE	21	Number		<input type="checkbox"/>			+ -
24	220	READING PERCENTILE	22	Number		<input type="checkbox"/>			+ -
25	230	SPEAKING PERCENTILE	23	Number		<input type="checkbox"/>			+ -
26	240	WRITING PERCENTILE	24	Number		<input type="checkbox"/>			+ -

Use the Mapping page to associate fields defined on the File Layout page with staging table fields defined in the context definition.

This image shows an example of a file mapping.

Field Name	Field Type	Required	Mapping Action	File Field Name	Sub Parse Field	Value	Skip if Blank
1 SUBMITTED	Char	No	Default Value			N	
2 USERID	Char	No	None				
3 EMPLID	Char	No	None				
4 SCC_TRANSAC_CD	Char	No	Default Value			SAD_PTE	
5 BIRTHDATE	Date	No	Direct from File	DATE OF BIRTH			
6 BIRTHPLACE	Char	No	None				
7 BIRTHSTATE	Char	No	None				
8 BIRTHCOUNTRY	Char	No	None				
9 DT_OF_DEATH	Date	No	None				
10 SCC_STG_STATUS	Char	No	Default Value			LD	
11 SCC_STG_STS_DT	Date	No	Default Value			%Date	
12 CREATED_DTTM	DTTM	No	Default Value			%DateTime	
13 LASTUPDDTTM	DTTM	No	Default Value			%DateTime	
14 SCC_SUBMITTED_DTTM	DTTM	No	None				
15 SCC_UID_ADMIN	Char	No	None				
16 SCC_ADMIN_MODE	Char	No	None				

For Prospect/Admissions data loads, the first record should always be SCC_STG_CONSTIT and the second record should be SCC_SL_TRNMAP. Enter rows for other staging records you want to populate in the proper parent-child relationship order.

There could be required description fields that may require a calculated field to populate. File Parser does not populate the description based on the code populated. You must build a calculated field to load a description. Examples of required description fields:

- Academic Interests - SCC_STG_ADMINT.DESCR
- Extracurricular Activities - SCC_STG_EXTRACU.DESCR
- External Degrees - SCC_STG_EXTDEGR.DESCR

You should also build calculated fields for LAST_NAME_SRCH and FIRST_NAME_SRCH on SCC_STG_NAMES to remove all characters and spaces. Sample code is available in the Campus Community – File Parser documentation.

See "Commonly Used Calculated Mapping Application Class Objects" (Campus Community Fundamentals).

Use the Preview Data page to test your external file with the file parser definitions.

Note: The preview feature shows only the first row of each row type; therefore, you should use a small test file when using this component. Using a large test file is simply a waste of resources that could potentially degrade the application server.

This image shows an example of previewing data.

The screenshot displays the 'Preview Data' tab of a PeopleSoft interface. At the top, there are tabs for 'File Definition', 'File Layout', 'Mapping', 'Preview Layout', and 'Preview Data'. Below these, the 'Map Name' is 'SAD_PTE_TESTPROSPECT' and the 'Attached File' is 'PTE_Prospect_2012.csv'. There are buttons for 'Preview Data', 'Add Attachment', 'Delete Attachment', and 'View Attachment'. The 'Row Types' section shows 'SAD_PTE_TESTPROSPECT' with 'Find', 'First', '1 of 1', and 'Last' controls. The 'Field Mapping' section shows 'Record' as 'SCC_STG_CONSTIT' and 'Row' as '1'. Below this is a table of 'Field Values' with 16 rows and 2 columns: 'Field Name' and 'Value'. The table is paginated with 'First', '1-16 of 16', and 'Last' controls. The data in the table is as follows:

Field Name	Value
1 SUBMITTED	N
2 USERID	
3 EMPLID	
4 SCC_TRANSAC_CD	SAD_PTE
5 BIRTHDATE	1980-01-06
6 BIRTHPLACE	
7 BIRTHSTATE	
8 BIRTHCOUNTRY	
9 DT_OF_DEATH	
10 SCC_STG_STATUS	LD
11 SCC_STG_STS_DT	2013-05-17
12 CREATED_DTTM	2013-05-17-11.18.26.000000
13 LASTUPDDTTM	2013-05-17-11.18.26.000000
14 SCC_SUBMITTED_DTTM	
15 SCC_UID_ADMIN	
16 SCC_ADMIN_MODE	

Related Links

"Setting Up File Mapping Definitions" (Campus Community Fundamentals)

Running the File Parser Process

Access the Run File Parser page (**Set Up SACR > System Administration > Utilities > File Parser > Run File Parser**).

Run the File Parser process to load the prospect/admissions data from a text file into the staging tables. Each record is loaded as a PDL transaction based on the default transaction code defaulted on SCC_STG_CONSTIT and SAD_PDL_HDR_STG on the Mapping page.

This image shows an example of a Run File Parser page.

Run File Parser

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

File Mapping ID: SAD_PTE_TESTPROSPECT

File Path	File List Indicator
\\yourservername\PTe Prospect 2012.csv	

From September 2020, *before* you run the process for ACT CSV files, it's recommended that you remove the header row in the CSV file, save, then upload the file.

Otherwise, you can do this:

1. Go to **Set Up SACR >System Administration >Utilities >File Parser >File Mapping Definition**.
2. Select *Multiple Row Types*.
3. Provide values for these fields:
 - Name: Header
 - Section ID Value: Enter your school code.
 - Field Number: 4

Related Links

"Running the File Parser Process" (Campus Community Fundamentals)

Reviewing and Editing Staged PDL Transactions

After loading the PDL data into the staging tables, review the staged constituent and prospect/admissions data. To review and edit the PDL transactions, use the Prospect/Admissions Staging component (SAD_PDL_DATA_STG).

This section discusses:

- Impact of CTM transaction security on navigation.
- Header on the Prospect/Admissions staging pages.
- Reviewing academic data and error messages.
- Reviewing education history.
- Reviewing prospect data.

- Reviewing general materials and attachments.

Pages Used to Review and Edit Staged PDL Transactions

Page Name	Definition Name	Navigation	Usage
Academic Information	SAD_PDL_ACAD_INFO	Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Academic Information	<p>Review the error messages pertaining to the PDL transaction in the staging record.</p> <p>Review and edit the additional academic information pertaining to the PDL transaction in the staging record. Additional academic information includes test results, additional test data using the Common Attribute Framework and academic interests.</p>
Education History	SAD_PDL_EDUC_HIST	Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Education History	<p>Review and edit the education history pertaining to the PDL transaction in the staging record. Education history includes information such as schools attended and degrees that are in progress or completed.</p>
Prospect Data	SAD_PDL_PROS_DATA	Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Prospect Data	<p>Review and edit the prospect data pertaining to the PDL transaction in the staging record.</p> <p>Prospect data includes prospect career, program, plan and subplan data in addition to additional prospect data using the Common Attribute Framework. Recruiting categories and recruiters are also included.</p>
Supplementation Information	SAD_PDL_GEN_MATL	Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Supplementation Information	<p>Review and edit the supplemental information pertaining to the PDL transaction in the staging record. Supplemental information includes general materials and general materials attachments.</p>

Impact of CTM Transaction Security on Navigation

One of the methods to navigate to the Prospect/Admissions Staging component is by clicking the <transaction name> link on the Constituent Staging component. There are two ways to access the Constituent Staging component:

- Campus Community menu path navigation (**Campus Community >Constituent Transaction Mgmt >Constituent Staging**).
- Student Recruiting menu path navigation (**Student Recruiting >Prospect/Admissions Data Mgmt > Constituent Staging**).

If you use the Campus Community menu path navigation and if your user ID is not associated with a particular transaction code, you cannot access the PDL data associated with that transaction code.

However, you can see the transaction that exists for the constituent. In the following example, a user can see there is a PDL transaction for the constituent. However, the user cannot view the PDL data because the <Transaction Name> link is disabled. The system has disabled the link because the user does not have access to the transaction code.

This image shows an example of the transaction link disabled for a user who does not have transaction code access.

The screenshot displays the 'Constituent Details' tab of the Constituent Staging component. It shows fields for Temporary ID (1237), User ID, Created Datetime (05/15/2013 3:17PM), Created By, Name (Murray, William), and Constituent Status (Loaded). Below these fields is a 'Run Search/Match/Post' button. Underneath is a 'Related Transactions' table with columns: Status, Transaction Code, Transaction Name, Status Date, Online, and Search/Match Results. The table contains one row with Status 'Submitted', Transaction Code 'SAD_PTE', Transaction Name 'PTE Test Score Load', Status Date '05/15/2013', and Online checkbox unchecked. The 'Search/Match Results' link is present but disabled.

Status	Transaction Code	Transaction Name	Status Date	Online	Search/Match Results
Submitted	SAD_PTE	PTE Test Score Load	05/15/2013	<input type="checkbox"/>	Search/Match Results

If you use the Student Recruiting menu path navigation and if your user ID is not associated with a particular transaction, you cannot see how many transactions associated with the transaction code exist. Also, you cannot view the PDL data associated with the transaction code. Therefore, the system strictly enforces the transaction security for the Student Recruiting menu as compared to Campus Community menu where the security is not enforced. In the following example, a user cannot see whether there is a PDL transaction for the constituent because the user does not have access to the transaction code.

This image shows hidden search results for a user who does not have the transaction code access.

Constituent Staging

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Temporary ID: =

Transaction: begins with

Transaction Status: =

Status Date: =

Constituent Status: =

Created Date: =

Last Name: begins with MURRAY

First Name: begins with WILLIAM

Empl ID: begins with

User ID: begins with

☐ Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

No matching values were found.

Header on the Prospect/Admissions Staging Pages

The header region on all the pages of the Prospect/Admissions Staging component is similar to the header region on the Constituent Staging component pages. This region includes options to modify the constituent status, run Search/Match/Post process or post a transaction.

Here is an example of the header region on a Prospect/Admissions Staging component page:

Academic Information **Education History** **Prospect Data** **Supplemental Information**

Temporary ID: 1259 Name: Black, Billy

User ID: Constituent Status: Loaded

Created Datetime: 05/15/2013 3:32PM ID:

Created By: **Run Search/Match/Post**

[Constituent Staging](#)

Field or Control	Description
Constituent Staging	Click this link to access the Constituent Staging component that contains all the pertinent person information.

Reviewing Academic Information Data and Error Messages

Access the Academic Information Page (**Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Academic Information**).

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

Academic Information
Education History
Prospect Data
Supplemental Information

Temporary ID: 1204
User ID:
Created Datetime: 05/15/2013 2:49PM
Created By:

Name: Builder, Blake
Constituent Status: Error
ID:

[Run Search/Match/Post](#)

[Constituent Staging](#)

Application Errors
Personalize | Find | View All |
First 1 of 1 Last

Message Sequence	Message Set Number	Message Number	Error Description	Translate Long Name	Process Instance
1	1	14200	67	The Score entered (9999) is outside the range allowed (0 - 999.9) for Test Component WR.	Error 6108

Transaction Code: SAD_IELTS
Transaction Status: Submitted

Transaction Name: IELTS Test Score Load
Status Date: 05/15/2013

[Expand All](#)
[Collapse All](#)

Test Results
Find | View All |
First 1 of 1 Last

*Test ID: IELTS International English Language
Last Updated On: 05/15/2013 2:49:08PM
Last Updated By: PS

Test Component
Others
Audit

*Test Component	Test Score	%tile	*Test Date
1 LISNG	7.00		04/11/2012
2 OVRLL	6.50		04/11/2012
3 READ	6.00		04/11/2012
4 SPKNG	6.00		04/11/2012
5 WR	9999.00		04/11/2012

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

The screenshot displays two sections of the Academic Information page (2 of 2).

Additional Test Data Section:

- Header: Additional Test Data, Find | View All, First 1 of 1 Last
- *Test Date: 04/11/2012
- Additional Test Values: Personalize | Find | View All | 1-5 of 6 Last
- Table with 5 rows and 3 columns: *Field, Text - 50, and a control column with + and - buttons.

	*Field	Text - 50	
1	IELTS_DOWNLOADID	279	+ -
2	IELTS_PARTNO	3	+ -
3	IELTS_CENTRENUMBER	GB599	+ -
4	IELTS_CANDIDATEID	AUS 4567 3897	+ -
5	IELTS_TRFNUMBER	05GB000004BUIR599A	+ -

Academic Interests Section:

- Header: Academic Interests, Find | View All, First 1 of 1 Last
- *Academic Career: [Search]
- Last Updated On:
- Last Updated By:
- Academic Interests | Audit | [Buttons]
- Table with 5 columns: *SeqNum, Subject Area, *Description, *Data Source, Priority, and a control column with + and - buttons.

*SeqNum	Subject Area	*Description	*Data Source	Priority	
1	[Search]	[Search]	Self-Rptd		+ -

Field or Control	Description
Application Errors	Errors related to the transaction data will appear here only after the Transaction Management process has been run or if the data on the component has been manually changed and saved.
Set Status to Submitted	<p>This button only appears if the transaction status is <i>Posted</i>.</p> <p>If you have inadvertently posted the transaction data to a wrong ID, click the Set Status to Submitted button. On clicking the button, the system sets the transaction status back to <i>Submitted</i>. For example, you may notice that test scores were posted to a new ID but you should have posted for an existing ID. To repost the test scores to the existing ID, perform the following steps:</p> <ol style="list-style-type: none"> 1. Click the Set Status to Submitted button and save the record. 2. Click the Set to Update ID button and select the existing ID. 3. Click the Run Search/Match/Post button to post the transaction.

The following table describes the transaction statuses:

<i>Transaction Status</i>	<i>Description</i>
Saved	<p>This status indicates that system has saved the PDL transaction to the staging records and the transaction is not ready to be processed.</p> <p>You can manually set this status if you want to indicate that the PDL transaction is not ready for processing.</p> <p>When setting up the file mapping definition, you must define the default value that File Parser should assign as the transaction status on SAD_PDL_HDR_STG.</p>
Submitted	<p>This status indicates that system has submitted the PDL transaction to the staging records and the transaction is ready to be processed.</p> <p>You can manually set this status if you want to indicate that the PDL transaction is ready for processing. You cannot post <i>Saved</i> transactions; only transactions with <i>Submitted</i> status can be posted.</p> <p>When setting up the file mapping definition, you must define the default value that File Parser should assign as the transaction status on SAD_PDL_HDR_STG.</p>
Saved Error	<p>This status indicates that the system encountered problems when saving a PDL transaction. You must resolve these errors before the transaction can be posted.</p> <p>You cannot manually change this status. When you resolve the error and save the staging record, the system automatically sets the status back to <i>Saved</i>.</p>
Submit Error	<p>This status indicates that the system encountered problems when submitting a PDL transaction. You must resolve these errors before the transaction can be posted.</p> <p>You cannot manually change this status. When you resolve the error and save the staging record, the system automatically sets the status back to <i>Submitted</i>.</p>
Posted	<p>This status indicates that the system has posted the data. The system runs the posting process when you click the Post Transaction Data button or the Run Search/Match/Post button, or when you run the Transaction Management process.</p>

Field or Control	Description
Additional Test Data	Enables you to store additional test score data that does not have a home in the core Campus Solutions records. Populate this section by test date with Common Attribute values defined within the Common Attribute Framework. The prompts in the Field column will display attributes associated on the record context for SAD_TESTDT.
Academic Interests	Academic interests can only be populated if the Prospect Data page is populated.

Reviewing Education History

Access the Education History page (**Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Education History**).

This example illustrates the fields and controls on the Education History page.

Academic Information

Education History

Prospect Data

Supplemental Information

Temporary ID: 1265

User ID:

Created Datetime: 05/15/2013 3:32PM

Created By:

[Constituent Staging](#)

Name: Weber, Angela

Constituent Status: Loaded

ID:

Run Search/Match/Post

Transaction Code: SAD_CFA

Transaction Status: Submitted

Transaction Name: CFA Prospect Load

Status Date: 05/15/2013

Expand All

Collapse All

School Information

Find | View All

First 1 of 1 Last

Sequence Number: 1

External Org ID: 000010022

School Name: Southern High School

School Country:

School Address:

School City: Denver

School State:

School CEEB Code: 210785

Last Updated On: 05/15/2013 3:32:20PM

Last Updated By: PS

School Postal:

School ACT Code:

Home School

Last School

Career Data

External Courses

External Degrees

Reviewing Prospect Data

Access the Prospect Data page (**Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Prospect Data**).

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

Academic Information	Education History	Prospect Data	Supplemental Information																																																																																				
Temporary ID: 1265 User ID: Created Datetime: 05/15/2013 3:32PM Created By: Constituent Staging	Name: Weber, Angela Constituent Status: Loaded ID: <input type="button" value="Run Search/Match/Post"/>																																																																																						
Transaction Code: SAD_CFA Transaction Status: Submitted	Transaction Name: CFA Prospect Load Status Date: 05/15/2013 <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>																																																																																						
Prospect Career Data Find View All First 1 of 1 Last																																																																																							
<table> <tr> <td>*Institution:</td> <td>PSUNV</td> <td>PeopleSoft University</td> <td></td> </tr> <tr> <td>*Academic Career:</td> <td>UGRD</td> <td>Undergraduate</td> <td></td> </tr> <tr> <td>Campus:</td> <td>MAIN</td> <td>Main Hacienda Campus</td> <td></td> </tr> <tr> <td>Admit Term:</td> <td>0700</td> <td>2013 Spring</td> <td></td> </tr> <tr> <td>Admit Type:</td> <td>FYR</td> <td>First-Year</td> <td></td> </tr> <tr> <td>Academic Level:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Academic Load:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Housing Interest:</td> <td></td> <td></td> <td> <input type="checkbox"/> Financial Aid Interest <input type="checkbox"/> Applied </td> </tr> <tr> <td>*Recruiting Status:</td> <td>Prospect</td> <td></td> <td></td> </tr> <tr> <td>Recruiting Status Date:</td> <td>05/15/2013</td> <td></td> <td></td> </tr> <tr> <td>Referral Source:</td> <td>FAIR</td> <td>College Fair</td> <td></td> </tr> <tr> <td>Referral Source Date:</td> <td>05/15/2013</td> <td></td> <td></td> </tr> <tr> <td>Created On:</td> <td>05/15/2013</td> <td></td> <td></td> </tr> <tr> <td>*Recruiting Center:</td> <td>ULAU</td> <td>UGRD Liberal Arts</td> <td></td> </tr> <tr> <td>Last School Attended:</td> <td>000010022</td> <td>Southern High School</td> <td></td> </tr> <tr> <td>Graduation Date:</td> <td>05/15/2013</td> <td></td> <td></td> </tr> <tr> <td>Region:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Region from:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Recruiter ID:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Last Updated On:</td> <td colspan="3">05/17/2013 1:35:59PM</td> </tr> <tr> <td>Last Updated By:</td> <td colspan="3">PS</td> </tr> </table>				*Institution:	PSUNV	PeopleSoft University		*Academic Career:	UGRD	Undergraduate		Campus:	MAIN	Main Hacienda Campus		Admit Term:	0700	2013 Spring		Admit Type:	FYR	First-Year		Academic Level:				Academic Load:				Housing Interest:			<input type="checkbox"/> Financial Aid Interest <input type="checkbox"/> Applied	*Recruiting Status:	Prospect			Recruiting Status Date:	05/15/2013			Referral Source:	FAIR	College Fair		Referral Source Date:	05/15/2013			Created On:	05/15/2013			*Recruiting Center:	ULAU	UGRD Liberal Arts		Last School Attended:	000010022	Southern High School		Graduation Date:	05/15/2013			Region:				Region from:				Recruiter ID:				Last Updated On:	05/17/2013 1:35:59PM			Last Updated By:	PS		
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Last Updated On:	05/17/2013 1:35:59PM																																																																																						
Last Updated By:	PS																																																																																						

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

The screenshot displays the 'Prospect Data' page (2 of 2) with the following sections:

- Additional Prospect Data:** A table with columns: *Field, Text - 20, LOV, Description. It contains five rows of data:

*Field	Text - 20	LOV	Description
1 CFA_TEXTOK	Yes		
2 CFA_PARENTSGRAD	Y		
3 CFA_CLASSRANK	DontKnow		
4 CFA_PARENTSCOLLEGE			
5 CFA_SCHLSETTINGPREF	Suburban		
- Program Data:**
 - *Academic Program: LAU Liberal Arts Undergraduate
 - *Recruiting Center: ULAU UGRD Liberal Arts
 - *Recruiting Status: Prospect
 - Status Date: 05/15/2013
 - Campus:
 - Last Updated On: 05/15/2013 3:32:20PM
 - Last Updated By: PS
- Plan Data:**
 - *Academic Plan: ENGL-BA English (BA)
 - Last Updated On: 05/15/2013 3:32:20PM
 - Last Updated By: PS
- Sub-Plan Data:**
 - *Sub-Plan:
 - Last Updated On:
 - Last Updated By:
- Recruiting Categories:**
 - *Category:
 - Sub-Category:
 - Last Updated On:
 - Last Updated By:
- Recruiters:**
 - *Recruiter ID:
 - Primary Flag
 - Last Updated On:
 - Last Updated By:

Field or Control	Description
Additional Prospect Data	Enables you to store additional prospect data that does not have a home in the core prospect records. Populate this section with values for common attributes defined within the Common Attribute Framework. The prompts in the Field column will display attributes associated on the record context for ADM_PRSPCT_CAR.

Reviewing General Materials

Access the Supplemental Information page (**Student Recruiting >Prospect/Admissions Data Mgmt >Prospect/Admissions Staging >Supplemental Information**).

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

Academic Information	Education History	Prospect Data	Supplemental Information
Temporary ID: 1265 User ID: Created Datetime: 05/15/2013 3:32PM Created By: Constituent Staging		Name: Weber, Angela Constituent Status: Loaded ID: <input type="button" value="Run Search/Match/Post"/>	
Transaction Code: SAD_CFA Transaction Status: Submitted		Transaction Name: CFA Prospect Load Status Date: 05/15/2013 <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>	
General Materials Find View All First 1 of 1 Last			
*Material Group: UGINTRWW Undergraduate Interview		<input type="button" value="+"/> <input type="button" value="-"/>	
*Material Type: INT Interview			
Material Nbr: 1 <input checked="" type="checkbox"/> Checklist Item Update			
Date Received: 05/17/2013			
Date Recorded: 05/17/2013			
Interview Type: STF Staff Interview			
Interviewer ID: ADREC1 John Chavez			
Committee:			
Comments:			
Last Updated On: 05/17/2013 1:59:47PM			
Last Updated By: PS			
File Attachments Personalize Find View All First 1 of 1 Last			
Attachments Audit			
Attached File		<input type="button" value="View"/>	<input type="button" value="Add Attachment"/>
		<input type="button" value="View"/>	<input type="button" value="Add Attachment"/>

Field or Control	Description
File Attachments	File attachments can only be attached manually to this page. File Parser does not support loading file attachments.

Posting PDL Transactions

After loading the PDL data into the staging tables, review the staged constituent and prospect/admissions data. Then, run the CTM Transaction Management process to search/match and post the staged data into the production tables of the Campus Solutions database. This process will also determine if any errors exist in the data being posted. If there are errors, the Constituent Staging Status is set to *Error* and the errors are displayed on the Constituent Staging (CTM) and Prospect/Admissions Staging components. Return to the Constituent Staging component and search for the transactions you are processing which have errors.

This example illustrates the fields and controls on an example of searching for transactions on the Constituent Staging page.

Constituent Staging

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Temporary ID:	=		
Transaction:	begins with	SAD_PTE	
Transaction Status:	=		
Status Date:	=		
Constituent Status:	=	Error	
Created Date:	=		
Last Name:	begins with		
First Name:	begins with		
Empl ID:	begins with		
User ID:	begins with		

☐ Case Sensitive

Search

Clear

[Basic Search](#)
[Save Search Criteria](#)

Correct the errors indicated on each transaction. Then, run the Transaction Management process again to post these records.

Depending on the transaction and your business processes, the manner in which you post the staged data may vary. A couple examples of how you might go about this are listed below.

Processing Steps for Posting all Staged Data for a Specific Transaction

1. Run the File Parser process to populate staging records based on incoming data file.

Set SAD_PDL_HDR_STG.SCC_TRANS_STS = SB (Submitted).

2. Run the Transaction Management process to perform search/match and post staging data for the transaction loaded.

Set the ID Selection field to *All Person Temporary IDs*. Select the Process Submitted Transactions, Run Search Match, Post Constituent, and Post Transaction Data check boxes. On clicking the Run button, the Process Scheduler Request page appears. Select the Prospect Data Load – SMP process on this page.

This example illustrates the fields and controls on the Selection Parameters page when posting all data for a transaction.

This example illustrates the fields and controls on the Process Scheduler Request page when running the Prospect Data Load – SMP process.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	SCC_SL_SMSET	SCC_SL_SMSET	Application Engine	Web	TXT	Distribution

At the bottom are 'OK' and 'Cancel' buttons.

3. Review staging records not posted based on search/match rules or validation errors.

Determine if new record should be created or existing record updated. Correct errors and save.

4. Manually post individual records or run the Transaction Management process again to post remaining records that were reviewed.

Processing Steps for Posting a Subset of Staged Data for a Specific Transaction

Let's say you only want to post test scores for those persons who received a minimum scores on a test you have loaded.

1. Run the File Parser process to populate staging records based on incoming data file.

Set SAD_PDL_HDR_STG.SCC_TRANS_STS = SB (Submitted).

2. Build a query in Query Manager to select your population based on your criteria defined.

The Pop Select Bind Record of SCC_SL_SMP_RQ must be the first record in your query and SCC_TEMP_ID must be the first field returned in the query results. Add other staging records as needed to select your population. Test your query to make sure the correct population is returned.

This example illustrates the fields and controls on the Query page for chosen records.

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name QA_CS_AD_PS_PDL_PTE Description Pop Select for PDL PTE Transac

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias Record

A SCC_SL_SMP_RQ - Pop Sel Bind Record [Hierarchy Join](#)

Check All Uncheck All

Fields Find | View All First 1 of 1 Last

☒ SCC_TEMP_ID - Temp Constituent ID

B SAD_PDL_STG_SRC - Staging Search [Hierarchy Join](#)

C SCC_STG_TESTCMP - Student Test Score Components [Hierarchy Join](#)

This example illustrates the fields and controls on the Criteria page of Query Manager.

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	B.SCC_TEMP_ID - Temporary ID	equal to	ASCC_TEMP_ID - Temp Constituent ID	Edit	
AND	C.SCC_TEMP_ID - Temp Constituent ID	equal to	ASCC_TEMP_ID - Temp Constituent ID	Edit	
AND	B.SCC_TRANSAC_CD - Transaction	equal to	SAD_PTE	Edit	
AND	B.SCC_STG_CRETEDDT - Created Date	not less than	:1	Edit	
AND	C.TEST_COMPONENT - Test Component	equal to	OVRLL	Edit	
AND	C.SCORE - Test Score	greater than	79	Edit	

- Run the Transaction Management process to perform search/match and post staging data for the transaction loaded.

Set the ID Selection field to *Population Selection*. Select the Process Submitted Transactions, Run Search Match, Post Constituent, and Post Transaction Data check boxes. In the Population Selection section, enter *PS Query* in the Selection Tool field and select the query name defined in Step 2. Test your results once again before running the process. On clicking the Run button, the Process Scheduler Request page appears. Select the Prospect Data Load – SMP process on this page.

This example illustrates the fields and controls on the Selection Parameters page when posting a subset of test takers for a transaction.

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

*Transaction Name: SAD_PTE PTE Test Score Load

ID Selection

*ID Selection: Population Selection

☒ Process Submitted Transactions ☐ Process Saved Transactions

Submitted Transactions

☒ Run Search Match
☒ Post Constituent
☒ Post Transaction Data

Population Selection

Selection Tool: PS Query [Edit Prompts](#)
 Query Name: PTE_POP_SELECT_PUBLIC [Launch Query Manager](#) [Preview Selection Results](#)

- Review staging records not posted based on search/match rules or validation errors.

Determine if new record should be created or existing record updated. Correct errors and save.

- Manually post individual records or run the Transaction Management process again to post remaining records that were reviewed.

Processing Steps for Posting All Test Scores But Create Prospects for Only a Subset of the Test Takers for a Specific Transaction

Let's say you want to post test scores for all test takers who sent you scores but you only want to create prospects for a subset of those test takers.

- Run the File Parser process to populate staging records based on incoming data file.

Set the SAD_PDL_HDR_STG.SCC_TRANS_STS = *SV* (Saved). Set up your File Parser mapping definition to populate the appropriate prospect staging records as well as the test results staging records.

- Build a query in Query Manager to select your prospect population based on your criteria defined.

The Pop Select Bind Record of SCC_SL_SMP_RQ must be the first record in your query and SCC_TEMP_ID must be the first field returned in the query results. Add other staging records as needed to select your population. Test your query to make sure the correct population is returned.

- Run the Transaction Management process to perform search/match and post staging data for the transaction loaded.

Set the ID Selection field to *All Person Temporary IDs*. Select the Process Saved Transactions, Run Search Match, and Post Constituent check boxes. On clicking the Run button, the Process Scheduler Request page appears. Select the Prospect Data Load – SMP process on this page. Running this process with these settings will run search/match and post the constituent data *ONLY* for these saved records. Test results are considered part of constituent data therefore test scores will be posted for everyone. The status of the transaction will remain at *Saved*. Staged prospect data will not post at this point.

This example illustrates the fields and controls on the Selection Parameters page when posting all test data for a transaction.

4. Review staging records not posted based on search/match rules or validation errors.

Determine if new record should be created or existing record updated. Correct errors and save.

5. Manually post individual records or run the Transaction Management process again to post remaining records that were reviewed using the same criteria as above.
6. Once you have posted all test data, run the Transaction Management process again to post the prospect data for your selected population.

Set the ID Selection field to *Population Selection*. Select the Process Saved Transaction, Run Search Match, Update Status to Submitted, Post Constituent, and Post Transaction Data check boxes. On clicking the Run button, the Process Scheduler Request page appears. Select the Prospect Data Load – SMP process on this page. Running this process with these settings will post the prospect data for only those records selected in the query. The status of the transaction for those selected will be set to *Posted*.

This example illustrates the fields and controls on the Selection Parameters page when creating prospects for a subset of test takers for a transaction.

Note: If the prospect record already exists for the institution and career of the transaction, the system updates the prospect record to insert program and plan data that does not exist, and also inserts values for the Admit Term, Admit Type, Campus, Academic Load, Academic Level, Referral Source, Source Date, Region, Region From, Housing Interest, Financial Aid Interest, Last School Attended and Graduation Date fields if not previously populated.

Commonly Used PDL Calculated Mapping Application Class Objects

This section discusses how to derive:

- Recruiting center.
- Academic interests – description.

For additional commonly used calculated mapping application class objects, see "Commonly Used Calculated Mapping Application Class Objects" (Campus Community Fundamentals)

Recruiting Center

```
import SCC_FILE_PARSER:MODEL:Results:ResultsField;
import SCC_FILE_PARSER:MODEL:Results:ResultsRecord;
import SCC_FILE_PARSER:UTIL:FieldCalculationAbstract;
import SCC_FILE_PARSER:MODEL:Results:ResultsCollection;
import SCC_FILE_PARSER:UTIL:Exception:FileParserException;

/**
 * class Recruiting_Center
 *
 * @version 1.0
 * @author Campus Solutions
 *
 * Module: Campus Community / Common
 * Description:
 */

class Recruiting_Center extends SCC_FILE_PARSER:UTIL:FieldCalculationAbstract
/* public methods */

    method Recruiting_Center();
    method calculateValue(&ResultsFieldIn As SCC_FILE_PARSER:MODEL:Results:ResultsField, &ResultsCollectionIn As SCC_FILE_PARSER:MODEL:Results:ResultsCollection) Returns any;

private
    method GetFileData();
    method GetFieldReferences();

    instance string &adm_rec_rctrOut;
    instance string &RecruitingCenter;

    instance SCC_FILE_PARSER:MODEL:Results:ResultsField &ResultsField;
    instance SCC_FILE_PARSER:MODEL:Results:ResultsCollection &ResultsCollection;
    instance SCC_FILE_PARSER:MODEL:Results:ResultsField &InstitutionField;
    instance SCC_FILE_PARSER:MODEL:Results:ResultsField &CareerField;
    instance SCC_FILE_PARSER:MODEL:Results:ResultsField &ProgramField;
    instance SCC_FILE_PARSER:MODEL:Results:ResultsField &PlanField;

end-class;

/**
 * * * * *
 *
 * This method obtains the Recruiting Center based on incoming data.
 *
 * * * * *
 */

method Recruiting_Center

    %Super = create SCC_FILE_PARSER:UTIL:FieldCalculationAbstract();

end-method;
```

```

/**
 * * * * *
 *
 * This method is the driver for deriving the Recruiting Center
 * * * * *
 */

method calculateValue
  /+ &ResultsFieldIn as SCC_FILE_PARSER:MODEL:Results:ResultsField, +/
  /+ &ResultsCollectionIn as SCC_FILE_PARSER:MODEL:Results:ResultsCollection +/
  /+ Returns Any +/
  /+ Extends/implements SCC_FILE_PARSER:UTIL:FieldCalculationAbstract.CalculateVal⇒
ue +/

  &ResultsCollection = &ResultsCollectionIn;
  &ResultsField = &ResultsFieldIn;

  %This.GetFileData();

  &RecruitingCenter = &adm_rec_r_ctrOut;

  Return &RecruitingCenter;

end-method;

/**
 * * * * *
 *
 * This method gets the Institution, Career, Program, and Plan from
 * the incoming data. Based on what data was supplied, there is an
 * iterative approach to obtaining the Recruiting Center
 * * * * *
 */

method GetFileData
  Local string &Institution, &Career, &Program, &Plan, &adm_rec_r_ctr;

  %This.GetFieldReferences();

  &Institution = "";
  If &InstitutionField <> Null Then
    &Institution = &InstitutionField.FieldValue;
  End-If;

  &Career = "";
  If &CareerField <> Null Then
    &Career = &CareerField.FieldValue;
  End-If;

  &Program = "";
  If &ProgramField <> Null Then
    &Program = &ProgramField.FieldValue;
  End-If;

  &Plan = "";
  If &PlanField <> Null Then
    &Plan = &PlanField.FieldValue;
  End-If;

  &adm_rec_r_ctr = "";
  If All(&Institution, &Career, &Program, &Plan) Then
    SQLExec("SELECT ADM_REC_R_CTR FROM PS_SAD_PDL_SETUP WHERE INSTITUTION = :1 AND⇒
ACAD_CAREER = :2 AND ACAD_PROG = :3 AND ACAD_PLAN = :4", &Institution, &Career, &P⇒
rogram, &Plan, &adm_rec_r_ctr);
  End-If;

```

```

    If &adm_recr_ctr = "" Then
        If All(&Institution, &Career, &Program) Then
            &Plan = " ";

            SQLExec("SELECT ADM_RECR_CTR FROM PS_SAD_PDL_SETUP WHERE INSTITUTION = :1 ⇒
AND ACAD_CAREER = :2 AND ACAD_PROG = :3 AND ACAD_PLAN = :4", &Institution, &Career,⇒
&Program, &Plan, &adm_recr_ctr);
            End-If;
        End-If;

        If &adm_recr_ctr = "" Then
            If All(&Institution, &Career) Then
                &Program = " ";
                &Plan = " ";

                SQLExec("SELECT ADM_RECR_CTR FROM PS_SAD_PDL_SETUP WHERE INSTITUTION = :1 ⇒
AND ACAD_CAREER = :2 AND ACAD_PROG = :3 AND ACAD_PLAN = :4", &Institution, &Career,⇒
&Program, &Plan, &adm_recr_ctr);
                End-If;
            End-If;

            &adm_recr_ctrOut = &adm_recr_ctr;
        end-method;

/**
 * * * * *
 *
 * This method obtains the Institution, Academic Career, Program and
 * Plan - if available.
 *
 * * * * *
 */

method GetFieldReferences

    Local integer &SegmentNbr;
    Local integer &RowNbr = 1;

    Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SAD_PRS_CAR_STG;
    Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SAD_PRS_PRG_STG;
    Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SAD_PRS_PLN_STG;

    &SegmentNbr = &ResultsField.ResultsRecord.SegmentNbr;

    &obj_SAD_PRS_CAR_STG = &ResultsCollection.GetResultsRecord(&SegmentNbr, "SAD_PRS⇒
_CAR_STG", &RowNbr);
    &obj_SAD_PRS_PRG_STG = &ResultsCollection.GetResultsRecord(&SegmentNbr, "SAD_PRS⇒
_PRG_STG", &RowNbr);
    &obj_SAD_PRS_PLN_STG = &ResultsCollection.GetResultsRecord(&SegmentNbr, "SAD_PRS⇒
_PLN_STG", &RowNbr);

    If &obj_SAD_PRS_CAR_STG <> Null Then
        &InstitutionField = &obj_SAD_PRS_CAR_STG.GetResultsField("INSTITUTION");

        &CareerField = &obj_SAD_PRS_CAR_STG.GetResultsField("ACAD_CAREER");
    End-If;

    If &obj_SAD_PRS_PRG_STG <> Null Then
        &ProgramField = &obj_SAD_PRS_PRG_STG.GetResultsField("ACAD_PROG");
    End-If;

```



```

    If &obj_SAD_PRN_PLN_STG <> Null Then
        &PlanField = &obj_SAD_PRN_PLN_STG.GetResultsField("ACAD_PLAN");
    End-If;

end-method;

```

Academic Interests – Description

```

import SCC_FILE_PARSER:UTIL:FieldCalculationAbstract;
import SCC_FILE_PARSER:MODEL:Results:ResultsField;
import SCC_FILE_PARSER:MODEL:Results:ResultsRecord;
import SCC_FILE_PARSER:MODEL:Results:ResultsCollection;
import SCC_FILE_PARSER:UTIL:Exception:FileParserException;

/**
 * class FetchSubjectDescr
 *
 * @version 1.0
 * @author Campus Solutions
 *
 * Module: Recruiting and Admissions / Common App.
 * Description:
 */

class FetchSubjectDescr extends SCC_FILE_PARSER:UTIL:FieldCalculationAbstract
/* public methods */

    method FetchSubjectDescr();
    method calculateValue(&ResultsFieldIn As SCC_FILE_PARSER:MODEL:Results:ResultsField, &ResultsCollectionIn As SCC_FILE_PARSER:MODEL:Results:ResultsCollection) Returns any;

private
    method GetFileData();
    method GetFieldReferences();

    instance string &SubjectArea;
    instance string &SubjectAreaDescrOut;

    instance SCC_FILE_PARSER:MODEL:Results:ResultsField &ResultsField;
    instance SCC_FILE_PARSER:MODEL:Results:ResultsCollection &ResultsCollection;
    instance SCC_FILE_PARSER:MODEL:Results:ResultsField &SubjectAreaField;

end-class;

/**
 * * * * *
 * This method obtains the Subject Description based on incoming data.
 * * * * *
 */

method FetchSubjectDescr

    %Super = create SCC_FILE_PARSER:UTIL:FieldCalculationAbstract();

end-method;

/**
 * * * * *
 * This method is the driver for deriving the Subject Description.
 * * * * *
 */

```

```

    */

method calculateValue
    /+ &ResultsFieldIn as SCC_FILE_PARSER:MODEL:Results:ResultsField, +/
    /+ &ResultsCollectionIn as SCC_FILE_PARSER:MODEL:Results:ResultsCollection +/
    /+ Returns Any +/
    /+ Extends/implements SCC_FILE_PARSER:UTIL:FieldCalculationAbstract.CalculateVal⇒
ue +/

    &ResultsCollection = &ResultsCollectionIn;
    &ResultsField = &ResultsFieldIn;

    %This.GetFileData();

    Return &SubjectAreaDescrOut;

end-method;

/**
 * * * * *
 *
 * This method obtains the Subject Description based on incoming
 * Subject Area.
 *
 * * * * *
 */

method GetFileData

    Local string &SubjectAreaDescr;

    If &SubjectAreaField = Null Then
        %This.GetFieldReferences();
    End-If;

    &SubjectArea = "";

    If &SubjectAreaField <> Null Then
        &SubjectArea = &SubjectAreaField.FieldValue;

        SQLExec("SELECT A.DESCR FROM PS_EXT_SUBJECT_TBL A WHERE A.EXT_SUBJECT_AREA =:⇒
1 AND A.EFF_STATUS = 'A' AND A.EFFDT = (SELECT MAX(A1.EFFDT) FROM PS_EXT_SUBJECT_TB⇒
L A1 WHERE A1.EXT_SUBJECT_AREA = A.EXT_SUBJECT_AREA AND A1.EFFDT <= %DateIn(:2))", ⇒
&SubjectArea, %Date, &SubjectAreaDescr);

        If &SubjectAreaDescr = "" Then
            &SubjectAreaDescrOut = "NOT FOUND";
        Else
            &SubjectAreaDescrOut = &SubjectAreaDescr;
        End-If;
    End-If;

end-method;

/**
 * * * * *
 *
 * This method obtains the Subject Area from the incoming data.
 *
 * * * * *
 */

method GetFieldReferences

    Local integer &SegmentNbr;

```

```

Local integer &RecordRow;

Local SCC_FILE_PARSER:MODEL:Results:ResultsRecord &obj_SCC_STG_ADMINT;

&SegmentNbr = &ResultsField.ResultsRecord.SegmentNbr;
&RecordRow = &ResultsField.ResultsRecord.RecordRow;

&obj_SCC_STG_ADMINT = &ResultsCollection.GetResultsRecord(&SegmentNbr, "SCC_STG_→
ADMINT", &RecordRow);

If &obj_SCC_STG_ADMINT <> Null Then
    &SubjectAreaField = &obj_SCC_STG_ADMINT.GetResultsField("EXT_SUBJECT_AREA");
End-If;

end-method;

```

Delivered PDL Templates

This section provides additional information about each of the templates Oracle delivers for you to use with Prospect/Admissions data loads.

This section discusses the templates for:

- College Fair Automation (CFA)
- International English Language Testing System (IELTS)
- Pearson Test of English (PTE)
- Test Of English as a Foreign Language (TOEFL)
- Graduate Management Admission Test (GMAT)
- Graduate Record Examinations (GRE)
- Educational Opportunity Service (EOS)
- American College Testing (ACT)
- Advanced Placement (AP)
- Law School Admission Test (LSAT)
- Student Search Service (SSS)
- Scholastic Aptitude Test (SAT)

College Fair Automation (CFA)

Delivered Transaction Code: SAD_CFA

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.

- **Search/Match Setup:** Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_CFA

Conversion examples have been delivered for the following fields:

- Academic Plan based on incoming AcademicInterestCD1 values.
- Academic Program based on incoming AcademicInterestCD1 values.
- Citizenship Status based on incoming Citizenship values.
- Ethnicity based on incoming Ethnicity values.
- Admit Type based on incoming FreshmanTransfer values.
- Admit Term based on incoming StartingTerm values.

Each of these conversions will need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Context Definition Template: SAD_CFA

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_CFA_PROSPECTS

This file mapping definition can be used to create prospects and populate supporting data such as academic interests and extracurricular activities. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_CFA. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Depending upon which college fair (NACAC, Regional, and so on) you are loading data for, the file layout may differ from the layout defined. Review this tab to ensure the fields appear in the exact order as that of the CFA layout you are using. Modify default values on the Date Day and Date Month columns for the field HSGradYear.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE – Two rows
- SCC_STG_EXTRACU.INSTITUTION – Twelve rows
- SCC_STG_STD_CAR.ACAD_CAREER
- SAD_PRS_CAR_STG.ACAD_CAREER
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_STG_PRS_CAF.ACAD_CAREER – Seven rows
- SAD_STG_PRS_CAF.INSTITUTION – Seven rows
- SCC_STG_ADMIHD.ACAD_CAREER
- SCC_STG_ADMINT.ACAD_CAREER – Three rows

Calculated Fields: The following calculated fields have been delivered for CFA:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SAD_PRS_CAR_STG.ADM_RECR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.
- SAD_PRS_CAR_STG.LAST_SCH_ATTEND - Uses the incoming value from CEEBCode to determine the EXT_ORG_ID to populate based on the EXT_ORG_TBL_ADM.ATP_CODE.
- SAD_PRS_PRG_STG.ADM_RECR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.
- SCC_STG_ACADHST.EXT_ORG_ID - Uses the incoming value from CEEBCode to determine the EXT_ORG_ID to populate based on the EXT_ORG_TBL_ADM.ATP_CODE.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated:

- CFA_CLASSRANK for ClassRank

- CFA_PARENTHCOLLEGE for ParentSiblingCollege
- CFA_PARENTHGRAD for ParentsGrad
- CFA_SCHLINOUTSTPREF for SchoolInOutOfState
- CFA_SCHLSETTINGPREF for SchoolSetting
- CFA_SCHLSIZEPREF for SchoolSize
- CFA_TEXTOK for TextOK

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. In addition to creating the common attribute and adding them to the record context for ADM_PRSPCT_CAR, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped include:

- Religion
- TransferFrom
- LastCompletedSemester
- SocialMediaLink
- CanMessage
- DrivingTime
- RateSchoolSetting
- RateSchoolInOutOfState
- RateSchoolSize
- RateSDrivingTime

International English Language Testing System (IELTS)

Delivered Transaction Code: SAD_IELTS

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template:

Not needed

Context Definition Template: SAD_IELTS

Review the delivered template and determine if any records need to be added. Modify this delivered definition. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_IELTS_TESTRESULTS

This file mapping definition can be used to post IELTS test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_IELTS. If you change this, all the file layout and mapping setup will disappear.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the IELTS layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_COMPONENT – Five rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Five rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Six rows

Calculated Fields: The following calculated fields have been delivered for IELTS:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_TESTCMP.SCORE - Looks at the incoming score value for ListeningTestScore, ReadingTestScore, WritingTestScore, SpeakingTestScore or OverallScore (depending on the application class ID populated). If the incoming value is 0 or -1, population of the row is skipped.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated:

- IELTS_DOWNLOADID for DownloadID
- IELTS_PARTNO for PartNo
- IELTS_CENTRENUMBER for CentreNumber
- IELTS_CANDIDATENUMBR for CandidateNumber
- IELTS_CANDIDATEID for CandidateID
- IELTS_TRFNUMBER for TRFNumber

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT record context. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped include:

- StartDate
- EndDate

To complete the setup for the delivered common attributes, see [Setting Up Filtering for Common Attributes](#).

Pearson Test of English (PTE)

Delivered Transaction Code: SAD_PTE

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_PTE

Conversion examples have been delivered for the following fields:

- Academic Career based on incoming Program Receiving Scores values.
- Academic Plan based on incoming Program Receiving Scores values.
- Academic Program based on incoming Program Receiving Scores values.
- STATE/PROVINCE/COUNTY based on incoming Country Of Residence and State/Province/County values. Used with a delivered calculated field.

Each of these conversions will need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Context Definition Template: SAD_PTE

Review the delivered template and determine if any records need to be added. Modify this delivered definition. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_PTE_TESTRESULTS

This file mapping definition can be used to post PTE test scores only. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_PTE. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the PTE layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE – Two rows
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_COMPONENT – Eleven rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Eleven rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Five rows

Calculated Fields: The following calculated fields have been delivered for PTE:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.

- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.STATE - Concatenates the incoming values for Country of Residence and State/Province/County and compares them to the Field Conversion Definition for STATE/PROVINCE/COUNTY to determine the value to populate.

File Mapping Definition Template: SAD_PTE_TESTPROSPECT

This file mapping definition can be used to post PTE test scores and create a prospect record. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab: Modify context definition and conversion definition to those you have created. Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the PTE layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices.

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE – Two rows
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_COMPONENT – Eleven rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE– Eleven rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Five rows
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PLN_STG.INSTITUTION

Calculated Fields: The following calculated fields have been delivered for PTE:

- `SCC_STG_NAMES.LAST_NAME_SRCH` - Removes all special characters and puts the field into upper case.
- `SCC_STG_NAMES.FIRST_NAME_SRCH` - Removes all special characters and puts the field into upper case.
- `SCC_STG_ADDR.STATE` - Concatenates the incoming values for the Country of Residence and State/Province/County fields and compares them to the field conversion definition for STATE/PROVINCE/COUNTY to determine the value to populate.
- `SAD_PRS_CAR_STG.ADM_RECR_CTR` - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated:

- `PTE_DTSCORESAVAIL` for Date Scores Available To Program
- `PTE_FIRSTTIMETESTTKR` for First-Time Test Taker
- `PTE_PROGRECScores` for Program Receiving Scores
- `PTE_REGISTRATIONID` for Registration Id
- `PTE_SCORESVALIDUNTIL` for Scores Valid Until

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the `SAD_TESTDT` record context. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped include: Irregularity Code

To complete the setup for the delivered common attributes, see [Setting Up Filtering for Common Attributes](#).

Test Of English as a Foreign Language (TOEFL)

Delivered Transaction Code: `SAD_TOEFL`

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: `SAD_TOEFL`

Conversion examples have been delivered for the following fields:

- Gender based on incoming Gender values.

- Language Code based on incoming Native Language Code values.
- Academic Career based on incoming Department Code values.

Each of these conversions may need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Note: Not all Native Language Code values have been mapped. The following incoming language codes are not mapped: AKA (Akan), ALB (Albanian), ASM (Assamese), AZE (Azerbaijani), BAM (Bambara), BAK (Bashkir), BAQ (Basque), BEL (Belarusian), BEN (Bemba), BER (Berber), BIK (Bikol), BOS (Bosnian), CAT (Catalan), CEB (Cebuano), NYA (Chichewa (Nyanja)), CHV (Chuvash), DYU (Dyula), EFI (Efik), EST (Estonian), EWE (Ewe), FIJ (Fijian), FIN (Finnish), FUL (Fulah), GAA (Ga), GLA (Galician), LUG (Ganda), GEO (Georgian), GRN (Guarani), GUJ (Gujarati), GWI (Gwichin), HAU (Hausa), HIL (Hiligaynon), IBO (Igbo), ILO (Iloko), IPK (Inupiaq), JAV (Javanese), KAU (Kanuri), KAS (Kashmiri), KAZ (Kazakh), KHM (Khmer), KIK (Kikuyu), KIN (Kinyarwanda), KOS (Kosraean), KUR (Kurdish), KUS (Kusaiean), LIN (Lingala), LUA (Luba-Lulua), LUO (Luo), LTZ (Luzembourghish), MAC (Macedonian), MAD (Madurese), MLG (Malagasy), MAL (Malayalam), MLT (Maltese), MAN (Mandingo), MAR (Marathi), MAH (Marshallese), MEN (Mende), MIN (Minangkabau), MON (Mongolian), MOS (Mossi), NAU (Nauru), NEP (Nepali), ORI (Orly), ORM (Oromo), PAU (Palauan), PON (Pohnpeian), PAN (Punjabi), PUS (Pushto), SMO (Samoan), SAT (Santali), SNA (Shona), SND (Sindhi), SIN (Sinhalese), SLO (Slovak), SLV (Slovenian), SOL (Somali), SUN (Sundanese), TGK (Tajik), TAT (Tatar), TIB (Tibetan), TIR (Tigrinya), TON (Tonga), TUK (Turkmen), UIG (Uighar), UZB (Uzbek), WOL (Wolof), XHO (Xhosa), YAP (Yapese), YID (Yiddish), YOR (Yoruba), YPK (Yupik), ZHA (Zhuang), ZUL (Zulu).

Context Definition Template: SAD_TOEFL

Review the delivered template and determine if any records need to be added. Modify this delivered definition. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_TOEFL_TESTRESULTS

This file mapping definition can be used to post TOEFL test scores only. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_TOEFL. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the TOEFL layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_COMPONENT – Ten rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Ten rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Ten rows

Calculated Fields: The following calculated fields have been delivered for TOEFL:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.LAST_NAME, SCC_STG_NAMES.FIRST_NAME and SCC_STG_NAMES.MIDDLE_NAME - Parses the incoming value in Last (Family) Name in position 43 into LAST_NAME, FIRST_NAME and MIDDLE_NAME when the Test Type = P (PBT) in field position 556. If the Test Type is I (IBT), the name parts will appear in the three separate fields Last (Family) Name, First (Given) Name and Middle Name and will populate LAST_NAME, FIRST_NAME and MIDDLE_NAME from the three fields.
- SCC_STG_TESTCMP.SCORE - Looks at the incoming score value for IBT Listening, IBT Speaking, IBT Total Score, P/B Section I Score and Total Score (depending on the application class ID populated). If the incoming value is ** or ***, population of the row is skipped.
- SCC_STG_ADDR.STATE - Validates the incoming country against the values in the country table. If the country exists, it then validates the incoming state-country combination against the state table. If the state-province is found, the state value is populated. If not, the field is left blank.

File Mapping Definition Template: SAD_TOEFL_TESTPROSPECT

This file mapping definition can be used to post TOEFL test scores and create a prospect record. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab: Modify context definition and conversion definition to those you have created. Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the TOEFL layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices.

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_COMPONENT – Ten rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Ten rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Ten rows
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE

Calculated Fields: The following calculated fields have been delivered for TOEFL:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.LAST_NAME, SCC_STG_NAMES.FIRST_NAME and SCC_STG_NAMES.MIDDLE_NAME - Parses the incoming value in Last (Family) Name in position 43 into LAST_NAME, FIRST_NAME and MIDDLE_NAME when the Test Type = *P* (PBT) in field position 556. If the Test Type is *I* (IBT), the name parts will appear in the three separate fields Last (Family) Name, First (Given) Name and Middle Name and will populate LAST_NAME, FIRST_NAME and MIDDLE_NAME from the three fields.
- SCC_STG_TESTCMP.SCORE - Looks at the incoming score value for IBT Listening, IBT Speaking, IBT Total Score, P/B Section I Score and Total Score (depending on the application class ID populated). If the incoming value is ** or ***, population of the row is skipped.
- SAD_PRS_CAR_STG.ADM_RECR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.
- SCC_STG_ADDR.STATE - Validates the incoming country against the values in the country table. If the country exists, it then validates the incoming state-country combination against the state table. If the state-province is found, the state value is populated. If not, the field is left blank.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the SAD_TESTDT record context:

- TOEFL_REG_NBR for Registration or Appointment Number
- TOEFL_TESTCTR_CD for Test Center Code
- TOEFL_LIST_IND for Listening Indicator
- TOEFL_SPK_IND for Speaking Indicator
- TOEFL_REASON_TKN for Reason for taking TOEFL
- TOEFL_DEGREE for Degree
- TOEFL_INTINFO_YEAR for Interpretive Info Year
- TOEFL_NBR_TAKEN for Number of times taken
- TOEFL_IBT_TESTCTR for IBT Test Center Code
- TOEFL_TSTCTR_CNTRY for Test Center Country

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT record context. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped include:

- Institution Code
- Department Code
- Address Country Name
- Native Country Name
- Test Type
- No Resp/Off Topic

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Graduate Management Admission Test (GMAT)

Delivered Transaction Code: SAD_GMAT

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.

- **Search/Match Setup:** Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_GMAT

Conversion examples have been delivered for the following fields:

- **Admit Term** based on incoming Graduation Date values.
- **Gender** based on incoming Gender values.
- **STATE/PROVINCE** based on incoming Country Of Residence and State/Province values. Used with a delivered calculated field.

Each of these conversions may need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Note: Not all State/Province Codes have been mapped. See the rows populated for the following provinces in Pakistan: PAKICT (Islamabad Capital Territory), PAKNWF (North West Frontier), PAKPUN (Punjab) and PAKSIN (Sindh) and enter an internal values for these states.

Context Definition Template: SAD_GMAT

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_GMAT_TESTPROSPECT

This file mapping definition can be used to create prospects in addition to populating test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_GMAT. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the GMAT layout you are using. Modify default values on the Date Day column for the fields:

- Administration Date
- Administration Date2
- Administration Date3

- Graduation Date

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Fifteen rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Fifteen rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Fifteen rows
- SCC_STG_TESTDT.TEST_ID – Three rows
- SAD_STG_TST_CAF.TEST_ID – Eight rows
- SCC_STG_STD_CAR.ACAD_CAREER
- SAD_PRS_CAR_STG.ACAD_CAREER
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_PRG_STG.ACAD_CAREER
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.ACAD_PROG
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PLN_STG.ACAD_CAREER
- SAD_PRS_PLN_STG.INSTITUTION
- SAD_PRS_PLN_STG.ACAD_PROG
- SAD_PRS_PLN_STG.ACAD_PLAN
- SAD_STG_PRS_CAF.ACAD_CAREER – Three rows.
- SAD_STG_PRS_CAF.INSTITUTION – Three rows.

Calculated Fields: The following calculated fields have been delivered for GMAT:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.STATE - Concatenates the incoming values for the Country of Residence and State/Province/County fields and compares them to the field conversion definition for STATE/PROVINCE to determine the value to populate.
- SCC_STG_TESTCMP.SCORE - Looks at the incoming score value for the Verbal Converted Score, Quantitative Converted Score, Total Converted Score, Analytical Writing Converted Score and Integrated Reasoning Converted Score (depending on the application class ID populated). If the incoming value is ++ or +++ or ~~, population of the row is skipped.
- SCC_STG_TESTCMP.PERCENTILE - Looks at the incoming percentile value for the Verbal Percentage Below, Quantitative Percentage Below, Total Score Percentage Below, Analytical Writing Percentage Below or Integrated Reasoning Percentage (depending on the application class ID populated). If the incoming value is ++ or ~~, population of the field is skipped.
- SAD_PRS_CAR_STG.ADM_RECR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.
- SAD_PRS_CAR_STG.LAST_SCH_ATTEND - Uses the incoming value from Attending Institution Code to determine the EXT_ORG_ID to populate based on the EXT_ORG_TBL_ADM.ATP_CODE.

File Mapping Definition Template: SAD_GMAT_TESTRESULTS

This file mapping definition can be used to post GMAT test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_GMAT. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the GMAT layout you are using. Modify default values on the Date Day column for the fields:

- Administration Date
- Administration Date2
- Administration Date3
- Graduation Date

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Fifteen rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Fifteen rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Fifteen rows
- SCC_STG_TESTDT.TEST_ID – Three rows
- SAD_STG_TST_CAF.TEST_ID – Eleven rows

Calculated Fields: The following calculated fields have been delivered for GMAT:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.STATE - Concatenates the incoming values for the Country of Residence and State/Province/County fields and compares them to the field conversion definition for STATE/PROVINCE to determine the value to populate.
- SCC_STG_TESTCMP.SCORE - Looks at the incoming score value for the Verbal Converted Score, Quantitative Converted Score, Total Converted Score, Analytical Writing Converted Score and Integrated Reasoning Converted Score (depending on the application class ID populated). If the incoming value is ++ or +++ or ~~, population of the row is skipped.
- SCC_STG_TESTCMP.PERCENTILE - Looks at the incoming percentile value for the Verbal Percentage Below, Quantitative Percentage Below, Total Score Percentage Below, Analytical Writing Percentage Below or Integrated Reasoning Percentage (depending on the application class ID populated). If the incoming value is ++ or ~~, population of the field is skipped.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the SAD_TESTDT record context:

- GMAT_DT_SCORE - Date Scores Published to Program.
- GMAT_EDU_LVL - Education Level.

- GMAT_ID_NBR - GMAT ID Number.
- GMAT_IN_GRD_STUDY - Intended Graduate Study.
- GMAT_IRR_CD - Irregularity Code.
- GMAT_PROG_CD - GMAT Program Code.
- GMAT_REG_NBR - Registration/Appt Number.
- GMAT_UGRD_MJCD - Undergraduate Major Code.
- GMAT_UGRD_PTAVG - Undergraduate Grade Point Average.

These attributes should be associate with the ADM_PRSPCT_CAR Record Context:

- GMAT_EDU_LVL - Education Level.
- GMAT_UGRD_MJCD - Undergraduate Major Code.
- GMAT_UGRD_PTAVG - Undergraduate Grade Point Average.

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Graduate Record Examinations (GRE)

Delivered Transaction Code: SAD_GRE

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_GRE

Conversion examples have been delivered for the following fields:

- ACAD CAREER based on incoming Department Code value.
- ACAD_PROG based on incoming Department Code value.
- ACAD PLAN based on incoming Intended Graduate Major Field value.
- GENDER based on incoming Gender value.

Each of these conversions may need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Context Definition Template: SAD_GRE

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_GRE_TESTPROSPECT

This file mapping definition can be used to create prospects, populate test scores and supporting data such as academic interests. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_GRE. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the GRE layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Twenty-one rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Twenty-one rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Twenty-one rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Seven rows
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS

- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PLN_STG.INSTITUTION
- SCC_STG_ADMINT.LS_DATA_SOURCE

Calculated Fields: The following calculated fields have been delivered for GRE:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_TESTCMP.SCORE - Twenty one rows. Formats the incoming score.
 - Verbal Reasoning Score: If Test Code is 02 and Score Type is V, then Scaled Score should be populated.
 - Quantitative Reasoning Score: If Test Code is 02 and Score Type is Q, then Scaled Score should be populated.
 - New Verbal Reasoning Score: If Test Code is 03 and Score Type is V, then Scaled Score should be populated. OR If Test Code is 02 and Score Type is V, then Estimated Current Score should be populated.
 - New Quantitative Reasoning Score: If Test Code is 03 and Score Type is Q, then Scaled Score should be populated. OR If Test Code is 02 and Score Type is Q, then Estimated Current Score should be populated.
 - Analytical Writing Score: If Test Code is 02 or 03 and Score Type is W, then Scaled Score should be populated.
 - Biochemistry, Cell, Molecular Biology Score: If Test Code is 22 and Score Type is S, then Scaled Score should be populated.
 - Biochemistry Subscore: If Test Code is 22 and Score Type is 1, then Scaled Score should be populated.
 - Cell Biology Subscore: If Test Code is 22 and Score Type is 2, then Scaled Score should be populated.
 - Molecular Bio & Genetics Subscore: If Test Code is 22 and Score Type is 3, then Scaled Score should be populated.
 - Biology Score: If Test Code is 24 and Score Type is S, then Scaled Score should be populated.
 - Cellular & Molecular Bio Subscore: If Test Code is 24 and Score Type is 1, then Scaled Score should be populated.
 - Organismal Biology Subscore: If Test Code is 24 and Score Type is 2, then Scaled Score should be populated.

- Ecology & Evolution Subscore: If Test Code is 24 and Score Type is 3, then Scaled Score should be populated.
- Chemistry Score: If Test Code is 27 and Score Type is S, then Scaled Score should be populated.
- Computer Science Score: If Test Code is 29 and Score Type is S, then Scaled Score should be populated.
- Literature in English Score: If Test Code is 64 and Score Type is S, then Scaled Score should be populated.
- Mathematics Score: If Test Code is 68 and Score Type is S, then Scaled Score should be populated.
- Physics Score: If Test Code is 77 and Score Type is S, then Scaled Score should be populated .
- Psychology Score: If Test Code is 81 and Score Type is S, then Scaled Score should be populated.
- Experimental Psychology Subscore: If Test Code is 81 and Score Type is 1, then Scaled Score should be populated.
- Social Psychology Subscore: If Test Code is 81 and Score Type is 2, then Scaled Score should be populated.
- SCC_STG_TESTCMP.PERCENTILE - Twenty One rows. Formats the incoming percentile.
 - Verbal Reasoning Percentage: If Test Code is 02 and Score Type is V, then Percentage Rank should be populated.
 - Quantitative Reasoning Percentage: If Test Code is 02 and Score Type is Q, then Percentage Rank should be populated.
 - New Verbal Reasoning Percentage: If Test Code is 03 and Score Type is V, then Percentage Rank should be populated.
 - New Quantitative Reasoning Percentage: If Test Code is 03 and Score Type is Q, then Percentage Rank should be populated.
 - Analytical Writing Percentage: If Test Code is 02 or 03 and Score Type is W, then Percentage Rank should be populated.
 - Biochemistry, Cell, Molecular Biology Percentage: If Test Code is 22 and Score Type is S, then Percentage Rank should be populated.
 - Biochemistry Percentage: If Test Code is 22 and Score Type is 1, then Percentage Rank should be populated.
 - Cell Biology Percentage: If Test Code is 22 and Score Type is 2, then Percentage Rank should be populated.
 - Molecular Bio & Genetics Percentage: If Test Code is 22 and Score Type is 3, then Percentage Rank should be populated.
 - Biology Percentage: If Test Code is 24 and Score Type is S, then Percentage Rank should be populated.

- Cellular & Molecular Bio Percentage: If Test Code is 24 and Score Type is 1, then Percentage Rank should be populated.
 - Organismal Biology Percentage: If Test Code is 24 and Score Type is 2, then Percentage Rank should be populated.
 - Ecology & Evolution Percentage: If Test Code is 24 and Score Type is 3, then Percentage Rank should be populated.
 - Chemistry Percentage: If Test Code is 27 and Score Type is S, then Percentage Rank should be populated.
 - Computer Science Percentage: If Test Code is 29 and Score Type is S, then Percentage Rank should be populated.
 - Literature in English Percentage: If Test Code is 64 and Score Type is S, then Percentage Rank should be populated.
 - Mathematics Percentage: If Test Code is 68 and Score Type is S, then Percentage Rank should be populated.
 - Physics Percentage: If Test Code is 77 and Score Type is S, then Percentage Rank should be populated.
 - Psychology Percentage: If Test Code is 81 and Score Type is S, then Percentage Rank should be populated.
 - Experimental Psychology Percentage: If Test Code is 81 and Score Type is 1, then Percentage Rank should be populated.
 - Social Psychology Percentage: If Test Code is 81 and Score Type is 2, then Percentage Rank should be populated.
- SAD_PRS_CAR_STG.ADM_RECR_CTR - Derives the Recruiting Center based on the incoming Institution, Career, Program, and Plan.

File Mapping Definition Template: SAD_GRE_TESTRESULTS

This file mapping definition can be used to post GRE test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_GRE. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the GRE layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Twenty-one rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Twenty-one rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Twenty-one rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Seven rows

Calculated Fields: The following calculated fields have been delivered for GRE:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_TESTCMP.SCORE - Twenty one rows. Formats the incoming score.
 - Verbal Reasoning Score: If Test Code is 02 and Score Type is V, then Scaled Score should be populated.
 - Quantitative Reasoning Score: If Test Code is 02 and Score Type is Q, then Scaled Score should be populated.
 - New Verbal Reasoning Score: If Test Code is 03 and Score Type is V, then Scaled Score should be populated. OR If Test Code is 02 and Score Type is V, then Estimated Current Score should be populated.
 - New Quantitative Reasoning Score: If Test Code is 03 and Score Type is V, then Scaled Score should be populated. OR If Test Code is 02 and Score Type is Q, then Estimated Current Score should be populated.
 - Analytical Writing Score: If Test Code is 02 or 03 and Score Type is W, then Scaled Score should be populated.
 - Biochemistry, Cell, Molecular Biology Score: If Test Code is 22 and Score Type is S, then Scaled Score should be populated.

- Biochemistry Subscore: If Test Code is 22 and Score Type is 1, then Scaled Score should be populated.
- Cell Biology Subscore: If Test Code is 22 and Score Type is 2, then Scaled Score should be populated.
- Molecular Bio & Genetics Subscore: If Test Code is 22 and Score Type is 3, then Scaled Score should be populated.
- Biology Score: If Test Code is 24 and Score Type is S, then Scaled Score should be populated.
- Cellular & Molecular Bio Subscore: If Test Code is 24 and Score Type is 1, then Scaled Score should be populated.
- Organismal Biology Subscore: If Test Code is 24 and Score Type is 2, then Scaled Score should be populated.
- Ecology & Evolution Subscore: If Test Code is 24 and Score Type is 3, then Scaled Score should be populated.
- Chemistry Score: If Test Code is 27 and Score Type is S, then Scaled Score should be populated.
- Computer Science Score: If Test Code is 29 and Score Type is S, then Scaled Score should be populated.
- Literature in English Score: If Test Code is 64 and Score Type is S, then Scaled Score should be populated.
- Mathematics Score: If Test Code is 68 and Score Type is S, then Scaled Score should be populated.
- Physics Score: If Test Code is 77 and Score Type is S, then Scaled Score should be populated.
- Psychology Score: If Test Code is 81 and Score Type is S, then Scaled Score should be populated.
- Experimental Psychology Subscore: If Test Code is 81 and Score Type is 1, then Scaled Score should be populated.
- Social Psychology Subscore: If Test Code is 81 and Score Type is 2, then Scaled Score should be populated.
- SCC_STG_TESTCMP.PERCENTILE - Twenty one rows. Formats the incoming percentile.
 - Verbal Reasoning Percentage: If Test Code is 02 and Score Type is V, then Percentage Rank should be populated.
 - Quantitative Reasoning Percentage: If Test Code is 02 and Score Type is Q, then Percentage Rank should be populated.
 - New Verbal Reasoning Percentage: If Test Code is 03 and Score Type is V, then Percentage Rank should be populated.
 - New Quantitative Reasoning Percentage: If Test Code is 03 and Score Type is Q, then Percentage Rank should be populated.

- Analytical Writing Percentage: If Test Code is 02 or 03 and Score Type is W, then Percentage Rank should be populated.
- Biochemistry, Cell, Molecular Biology Percentage: If Test Code is 22 and Score Type is S, then Percentage Rank should be populated.
- Biochemistry Percentage: If Test Code is 22 and Score Type is 1, then Percentage Rank should be populated.
- Cell Biology Percentage: If Test Code is 22 and Score Type is 2, then Percentage Rank should be populated.
- Molecular Bio & Genetics Percentage: If Test Code is 22 and Score Type is 3, then Percentage Rank should be populated.
- Biology Percentage: If Test Code is 24 and Score Type is S, then Percentage Rank should be populated.
- Cellular & Molecular Bio Percentage: If Test Code is 24 and Score Type is 1, then Percentage Rank should be populated.
- Organismal Biology Percentage: If Test Code is 24 and Score Type is 2, then Percentage Rank should be populated.
- Ecology & Evolution Percentage: If Test Code is 24 and Score Type is 3, then Percentage Rank should be populated.
- Chemistry Percentage: If Test Code is 27 and Score Type is S, then Percentage Rank should be populated.
- Computer Science Percentage: If Test Code is 29 and Score Type is S, then Percentage Rank should be populated.
- Literature in English Percentage: If Test Code is 64 and Score Type is S, then Percentage Rank should be populated.
- Mathematics Percentage: If Test Code is 68 and Score Type is S, then Percentage Rank should be populated.
- Physics Percentage: If Test Code is 77 and Score Type is S, then Percentage Rank should be populated.
- Psychology Percentage: If Test Code is 81 and Score Type is S, then Percentage Rank should be populated.
- Experimental Psychology Percentage: If Test Code is 81 and Score Type is 1, then Percentage Rank should be populated.
- Social Psychology Percentage: If Test Code is 81 and Score Type is 2, then Percentage Rank should be populated.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the SAD_TESTDT record context:

- GRE_LAST4_SSN - Social Security Number – Last 4 Digits
- GRE_REG_NBR - Registration Number
- GRE_TEST_NAME - Test Name
- GRE_EXAM_SEQ_NO - Examinee Sequence No.
- GRE_REC_SRL_NBR - Record Serial Number
- GRE_CYCLE_NO - Cycle Number
- GRE_PROC_DT - Process Date

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT record context. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped include:

- Institution Name
- Department Name
- Country
- Test Code

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Educational Opportunity Service (EOS)

Delivered Transaction Code: SAD_EOS

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_EOS

Conversion examples have been delivered for the following fields:

- Gender based on incoming Gender value.

- Racial/Ethnicity based on incoming Racial/Ethnicity value.
- Admit Term based on incoming Year of H.S. Graduation value.
- Academic Program based on incoming Intended College Major value.
- Academic Plan based on incoming Intended College Major value.
- Academic Interest based on incoming Intended College Major value.

Each of these conversions may need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Context Definition Template: SAD_EOS

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_EOS_PROSPECTS

This file mapping definition can be used to create prospects, populate test scores and supporting data such as academic interests. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_EOS. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the EOS layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_CONSTIT.SCC_TRANSAC_CD
- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SAD_PDL_HDR_STG.SCC_TRANSAC_CD
- SCC_STG_STD_CAR.ACAD_CAREER

- SAD_PRS_CAR_STG.ACAD_CAREER
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_PRG_STG.ACAD_CAREER
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PLN_STG.ACAD_CAREER
- SAD_PRS_PLN_STG_PRG.INSTITUTION
- SAD_STG_PRS_CAF.ACAD_CAREER
- SAD_STG_PRS_CAF.INSTITUTION
- SCC_STG_ADMIHD.ACAD_CAREER
- SCC_STG_ADMINT.ACAD_CAREER

Calculated Fields: The following calculated fields have been delivered for EOS:

- SCC_STG_CONSTIT.BIRTHDATE - Removes zeros from birthdate which are delivered if the Birthdate in position 160 is blank or invalid.
- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.COUNTRY - Uses the incoming value from Country Code in position 127 to determine the three character Country value to populate from COUNTRY_TBL.
- SCC_STG_ADDR.STATE - Populates incoming State field value starting at position 116 when the country is USA. Populates incoming Canadian Province field value starting at position 130 when the country is CAN. For other countries, the STATE field is not populated.
- SCC_STG_ADDR.POSTAL - Populates incoming ZIP Code + 4 field starting at position 118 when the country is USA. Populates incoming Non U.S. Postal Code field starting at position 132 when the country is CAN or other countries.
- SAD_PRS_CAR_STG.ADM_RCR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.
- SAD_PRS_CAR_STG.LAST_SCH_ATTEND - Uses the incoming value from High School Code Number in position 175 to determine the EXT_ORG_ID to populate based on the EXT_ORG_TBL_ADM.ACT_CODE.

- SCC_STG_ADMINT.DESCR - Derive the academic interest description based on the External Subject Area populated.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the ADM_PRSPCT_CAR record context:

- EOS_MOBILITY_INDEX - Mobility Index
- EOS_PERRANK_MOBINDEX - Percentile Rank Mobility Index
- EOS_INST_TYPE_INDEX - Institution Type Index
- EOS_PERRANK_INSTINDEX - Percentile Rank Inst Type Index
- EOS_SEL_INDEX - Selectivity Index
- EOS_PERRANK_SELINDEX - Percentile Rank Selectivity Index
- EOS_INST_SIZE_INDEX - Institution Size Index
- EOS_PERRANK_INSTSZINDEX - Percentile Rank Inst Size Index

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT record context. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped include:

- Purchase ID
- Occupational Choice
- State Code

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

American College Testing (ACT)

Delivered Transaction Code: SAD_ACT

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_ACT

Note: From September 2020, when processing ACT test results, copy your existing SAD_ACT field conversion definition template, then name the copy as *SAD_ACT_2020*. This template is used in the file mapping definition template SAD_ACT_TESTRESULTS_2020. You have to update SAD_ACT_2020 to map incoming data from the ACT Test File. It's a Campus Solutions-based setup table. To determine all the new fields in the test file, you must review 2020-2021 ACT College Score Reporting Service Layout.

Conversion examples have been delivered for the following fields:

- Citizenship based on incoming Citizenship value.
- Gender based on incoming Gender Alpha value.
- Phone Type based on incoming Type of Telephone value.
- NID Country based on incoming Country Code value.
- Ethnicity based on incoming Race Background values in position 609-615.
- Hispanic/Latino based on incoming Hispanic or Latino Background value.
- Academic Interest based on incoming Major Plan value.
- Academic Program based on incoming Major Plan value.
- Academic Plan based on incoming Major Plan value.
- Academic Level based on incoming Academic Level value.
- Academic Load based on incoming Academic Load value.
- Admit Term based on incoming Year of H.S. Graduation value.
- Planned Housing based on incoming Planned Housing value.
- Financial Aid based on incoming Financial Aid value.
- Campus or community service (Extracurricular Activity Description) based on incoming Campus or community service value.
- Debate (Extracurricular Activity Description) based on incoming Debate value.
- Dramatics, theater (Extracurricular Activity Description) based on incoming Dramatics, theater value.
- Fraternity or sorority (Extracurricular Activity Description) based on incoming Fraternity or sorority value.
- Instrumental music (Extracurricular Activity Description) based on incoming Instrumental music value.
- Political organizations (Extracurricular Activity Description) based on incoming Political organizations value.
- Publications (Extracurricular Activity Description) based on incoming Publications value.

- Racial or ethnic organizations (Extracurricular Activity Description) based on incoming Racial or ethnic organizations value.
- Radio-TV (Extracurricular Activity Description) based on incoming Radio-TV value.
- Religious organizations (Extracurricular Activity Description) based on incoming Religious organizations value.
- Student government (Extracurricular Activity Description) based on incoming Student government value.
- Varsity athletics (Extracurricular Activity Description) based on incoming Varsity athletics value.
- Vocal music (Extracurricular Activity Description) based on incoming Vocal music value.
- Test Location (Used to derive test day for Test Date) based on incoming Test Location value.

Each of these conversions may need to be modified based on your internal values. Modify the delivered version as it will be used on the File Mapping Definition component. Before modifying, make sure you create a copy so that you have the original version.

Context Definition Template: SAD_ACT

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_ACT_TESTPROSPECT

This file mapping definition can be used to create prospects, populate test scores and populate supporting data such as academic interests and extracurricular activities. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab: Change the delimiter if needed based on your file characteristics.

Important! Leave the context and conversion definitions as SAD_ACT. If you change this, all the file layout and mapping setup will disappear.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the ACT layout you are using. Also modify the default Date Day and Date Month values for Year of H.S. Graduation.

Mapping Tab: The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices.

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE

- SCC_STG_STD_CAR.ACAD_CAREER
- SAD_PRS_CAR_STG.ACAD_CAREER
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_CAR_STG.ACADEMIC_LEVEL
- SAD_PRS_CAR_STG.CAMPUS
- SAD_PRS_PRG_STG.ACAD_CAREER
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PRG_STG.CAMPUS
- SAD_PRS_PLN_STG.ACAD_CAREER
- SAD_PRS_PLN_STG.INSTITUTION
- SAD_STG_PRS_CAF.ACAD_CAREER – Nine rows
- SAD_STG_PRS_CAF.INSTITUTION – Nine rows
- SCC_STG_ADMIHD.ACAD_CAREER
- SCC_STG_ADMINT.ACAD_CAREER
- SCC_STG_EXTRACU.INSTITUTION – Thirteen rows
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Seven Rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Seven rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Seven rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Eight rows

Calculated Fields: The following calculated fields have been delivered for ACT:

- SCC_STG_CONSTIT.BIRTHDATE - Removes zeros from birthdate which are delivered if the Birthdate in position 155 is blank or invalid.
- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.

- `SCC_STG_NAMES.FIRST_NAME_SRCH` - Removes all special characters and puts the field into upper case.
- `SCC_STG_ADDR.COUNTRY` - Uses the incoming value from Country Code in position 85 to determine the three character Country value to populate from `COUNTRY_TBL`.
- `SCC_STG_ADDR.POSTAL` - Populates incoming ZIP Code + 4 field starting at position 146 when the country is USA. Populates incoming Non U.S. Postal Code field starting at position 253 when the country is CAN or other countries.
- `SCC_STG_ADDR.STATE` - Populates incoming State field value starting at position 142 when the country is USA. Populates incoming Canadian Province field value starting at position 250 when the country is CAN. For other countries, the STATE field is not populated nor is the STATE field populated if the value is FN or CN when country is USA.
- `SCC_STG_NID.NATIONAL_ID` - Populates National ID only when the incoming Social Security Number or ACT ID starting at position 91 doesn't start with the value - and length is equal to 9.
- `SAD_PRS_CAR_STG.ADM_RECR_CTR` - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.
- `SAD_PRS_CAR_STG.LAST_SCH_ATTEND` - Uses the incoming value from High School Code Number in position 205 to determine the `EXT_ORG_ID` to populate based on the `EXT_ORG_TBL_ADM.ACT_CODE`.
- `SCC_STG_ADMINT.DESCR` - Derive the academic interest description based on the External Subject Area populated.
- `SCC_STG_TESTCMP.TEST_DT`, `SCC_STG_TESTDT.TEST_DT` and `SAD_STG_TST_CAF.TEST_DT` - Determine the Test Date based on the incoming MMYYYY value for Expanded Test Date in position 227 plus the converted value for Test Location on the `SAD_ACT` Field Conversion Definition in position 249. The converted Test Location Value will produce the day. The converted value for Test Location (DD) should be combined with the Expanded Test Date (MMYYYY) to provide the full `TEST_DT` value (MMDDYYYY).

For this calculated field, it is important that the `SAD_ACT` field conversion definition is used. Modify the delivered version.

- `SCC_STG_TESTCMP.PERCENTILE` - Per the ACT Layout, the value -- will be populated for the National Norm if the score is not reported. If the percentile is populated with the value -- the field is not populated for the following fields:
 - Natl Norms – English in position 773
 - Natl Norms – Math in position 775
 - Natl Norms – Reading in position 777
 - Natl Norms – Science Reasoning in position 779
 - Natl Norms – Composite in position 781

- SCC_STG_TESTCMP.SCORE - Per the ACT Layout, the value -- will be populated for the score if it is not administered. If the score is populated with the value --, the row is not created for the following scores:
 - English Scaled Score in position 261
 - Math Scaled Score in position 263
 - Reading Scaled Score in position 265
 - Science Scaled Score in position 267
 - Composite Scaled Score in position 269
 - Combined English Writing Score in position 163
 - Writing Sub-score in position 165

File Mapping Definition Template: SAD_ACT_TESTRESULTS

This file mapping definition can be used to post ACT test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context and conversion definitions as SAD_ACT. If you change this, all the file layout and mapping setup will disappear.

Change the delimiter if needed based on your file characteristics.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the ACT layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Seven Rows
- SAD_STG_TST_CAF.TEST_ID – Eight rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Seven rows

- SCC_STG_TESTCMPLS_DATA_SOURCE – Seven rows
- SCC_STG_TESTDT.TEST_ID

Calculated Fields: The following calculated fields have been delivered for ACT:

- SCC_STG_CONSTIT.BIRTHDATE - Removes zeros from birthdate which are delivered if the Birthdate in position 155 is blank or invalid.
- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.COUNTRY - Uses the incoming value from Country Code in position 85 to determine the three character Country value to populate from COUNTRY_TBL.
- SCC_STG_ADDR.POSTAL - Populates incoming ZIP Code + 4 field starting at position 146 when the country is USA. Populates incoming Non U.S. Postal Code field starting at position 253 when the country is CAN or other countries.
- SCC_STG_ADDR.STATE - Populates incoming State field value starting at position 142 when the country is USA. Populates incoming Canadian Province field value starting at position 250 when the country is CAN. For other countries, the STATE field is not populated nor is the STATE field populated if the value is FN or CN when country is USA.
- SCC_STG_NID.NATIONAL_ID - Populates National ID only when the incoming Social Security Number or ACT ID starting at position 91 doesn't start with the value - and length is equal to 9.
- SCC_STG_TESTCMP.TEST_DT, SCC_STG_TESTDT.TEST_DT and SAD_STG_TST_CAF.TEST_DT - Determine the Test Date based on the incoming MMYYYY value for Expanded Test Date in position 227 plus the converted value for Test Location on the SAD_ACT Field Conversion Definition in position 249. The converted Test Location Value will produce the day. The converted value for Test Location (DD) should be combined with the Expanded Test Date (MMYYYY) to provide the full TEST_DT value (MMDDYYYY).

For this calculated field, it is important that the SAD_ACT field conversion definition is used. Modify the delivered version.

- SCC_STG_TESTCMP.PERCENTILE - Per the ACT Layout, the value -- will be populated for the National Norm if the score is not reported. If the percentile is populated with the value -- the field is not populated for the following fields:
 - Natl Norms – English in position 773
 - Natl Norms – Math in position 775
 - Natl Norms – Reading in position 777
 - Natl Norms – Science Reasoning in position 779
 - Natl Norms – Composite in position 781

- SCC_STG_TESTCMP.SCORE - Per the ACT Layout, the value -- will be populated for the score if it is not administered. If the score is populated with the value --, the row is not created for the following scores:
 - English Scaled Score in position 261
 - Math Scaled Score in position 263
 - Reading Scaled Score in position 265
 - Science Scaled Score in position 267
 - Composite Scaled Score in position 269
 - Combined English Writing Score in position 163
 - Writing Sub-score in position 165

Common Attribute Framework for SAD_ACT_TESTRESULTS

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the SAD_TESTDT record context:

- ACT_TEST_LOCATION for Test Location
- ACT_ESSAYCOMMENT1 for Essay Comment 1
- ACT_ESSAYCOMMENT2 for Essay Comment 2
- ACT_ESSAYCOMMENT3 for Essay Comment 3
- ACT_ESSAYCOMMENT4 for Essay Comment 4
- ACT_SCALESCORES_SUM for Sum of Scale Scores
- ACT_STATE_STUDENTID for State-Assigned Student ID
- ACT_CORRECTED_IND for Corrected Report Indicator

These attributes should be associated with the ADM_PRSPCT_CAR record context

- ACT_CLG_CHOICE_NBR for College Choice Number
- ACT_HS_CLASSRANK for High School Class Rank
- ACT_HS_GPA for High School GPA
- ACT_HS_CLASS_SIZE for High School Class Size
- ACT_CLG_TYPE_PREF for College Type Preference
- ACT_CLG_TYPE_RANK for Ranking College Type
- ACT_INSTTYPE_PREDINDEX for Pred Modeling Institution Type Index
- ACT_MOMGRD1_EDLEVEL for Mother/Guardian 1 Ed Level

- ACT_DADGRD2_EDLEVEL for Father/Guardian 2 Ed Level

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT or ADM_PRSPCT_CAR record context depending on your business process. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped upon initial delivery of the ACT File Mapping Definitions include:

- Reporting Year Identifier
- English Score before Oct 1989
- Math Score before Oct 1989
- Social Science Score before Oct 1989
- Natural Sciences Score before Oct 1989
- Composite Score before Oct 1989
- English GPA
- Math GPA
- Social Studies GPA
- Natural Sciences GPA
- H.S. Average
- Science Int Inv
- Arts Int Inv
- Social Service Int Inv
- Business Contact Int Inv
- Business Operations Int Inv
- Technical Int Inv
- Map Region 1
- Map Region 2
- Map Region 3
- College Code
- Usage/Mech Subscore
- Elem Algebra Subscore
- Soc Stud/Sci Subscore
- Rhetorical Skills Subscore

- Alg/Coord Geom Subscore
- Arts/Lit Subscore
- Plane Geom/Trig Subscore
- Usage/Mech National Norms
- Elem Algebra National Norms
- Soc Stud/Sci National Norms
- Rhetorical Skills National Norms
- Alg/Coord Geom National Norms
- Arts/Lit National Norms
- Plane Geom/Trig National Norms
- Usage/Mech Local Norms
- Elem Algebra Local Norms
- Soc Stud/Sci Local Norms
- Rhetorical Skills Local Norms
- Alg/Coord Geom Local Norms
- Arts/Lit Local Norms
- Plane Geom/Trig Local Norms
- Science Int Inv
- Arts Int Inv
- Social Service Int Inv
- Business Contact Int Inv
- Business Operations Int Inv
- Technical Int Inv
- Local ID Number
- Mobility Index
- Selectivity Index
- Institution Size Index
- Interest-Major Fit Score
- Legal Resident of State
- Disability

- Vocation Choice
- Confidence in College Major
- Confidence in Vocation
- Expected Highest Educ Level
- ROTC
- Decide Educ/Occup Plans
- Express Ideas in Writing
- Improve Reading Speed & Comp
- Improve Student Skills
- Independent Study
- Freshman honors courses
- Study in a foreign country
- Improve Math Skills
- Expect to Work
- Hours Expect to Work
- Total Combined Income
- Distance From College
- English Spoken at Home
- Ethnicity
- Pref College Gender Type
- PrefCollege State(1)
- PrefCollege State(2)
- Pref Max Annual Tuition
- Pref Student Body Size
- Ranking Gender Type
- Ranking Location
- Ranking Tuition
- Ranking Student Body Size
- Ranking Field of Study
- Ranking Other Factor

- High School Deser
- High School Prog Type
- Yrs Study: English
- Yrs Study: Mathematics
- Yrs Study: Social studies
- Yrs Study: Natural sciences
- Yrs Study: Spanish
- Yrs Study: German
- Yrs Study: French
- Yrs Study: Other Language
- Honors Courses English
- Honors Courses Math
- Honors Courses Social Studies
- Honors Courses Natural Sci
- Honors Courses Foreign Lang
- Organized school event
- Elected to student offices
- Leadership award
- Musical group
- Superior rating state music
- 1st/2nd/3rd debate
- Substantial roles in plays
- Appeared on radio or TV
- Exhibited art state/reg show
- High school art award
- City/country/state art award
- Published poems, stories
- Literary award or prize
- Published creative writing

- NSF summer program
- 1st/2nd/3rd reg/state science
- 1st/2nd/3rd school science
- Varsity sports letter
- Athletic honors
- Community service award
- Started business or service
- EOS Release
- Prefer not to respond
- Multiracial (converted records only)
- English 9 Taken or Planned
- English 10 Taken or Planned
- English 11 Taken or Planned
- English 12 Taken or Planned
- English Other Taken or Planned
- Algebra 1 Taken or Planned
- Algebra 2 Taken or Planned
- Geometry Taken or Planned
- Trigonometry Taken or Planned
- Calculus Taken or Planned
- Other Math Taken or Planned
- Computer Taken or Planned
- General Science Taken or Planned
- Biology Taken or Planned
- Chemistry Taken or Planned
- Physics Taken or Planned
- U.S. History Taken or Planned
- World History Taken or Planned
- Other History Taken or Planned
- Government Taken or Planned

- Economics Taken or Planned
- Geography Taken or Planned
- Psychology Taken or Planned
- Spanish Taken or Planned
- French Taken or Planned
- German Taken or Planned
- Other Language Taken or Planned
- Art Taken or Planned
- Music Taken or Planned
- Drama Taken or Planned
- English 9 Grade Earned
- English 10 Grade Earned
- English 11 Grade Earned
- English 12 Grade Earned
- English Other Grade Earned
- Algebra 1 Grade Earned
- Algebra 2 Grade Earned
- Geometry Grade Earned
- Trigonometry Grade Earned
- Calculus Grade Earned
- Other Math Grade Earned
- Computer Grade Earned
- General Science Grade Earned
- Biology Grade Earned
- Chemistry Grade Earned
- Physics Grade Earned
- U.S. History Grade Earned
- World History Grade Earned
- Other History Grade Earned
- Government Grade Earned

- Economics Grade Earned
- Geography Grade Earned
- Psychology Grade Earned
- Spanish Grade Earned
- French Grade Earned
- German Grade Earned
- Other Language Grade Earned
- Art Grade Earned
- Music Grade Earned
- Drama Grade Earned
- Pred Pct English
- Pred Pct Math
- Pred Pct Reading
- Pred Pct Science Reason
- Pred Pct Composite
- Pred Pct Ranking Overall 1
- Pred Pct Ranking Overall 2
- Pred Pct Ranking Overall 3
- Pred Pct Ranking Overall 4
- Pred Pct Ranking Overall 5
- Pred Pct Ranking Specific Courses 1
- Pred Pct Ranking Specific Courses 2
- Pred Pct Ranking Specific Courses 3
- Pred Pct Ranking Specific Courses 4
- Pred Pct Ranking Specific Courses 5
- Prob C or Higher Overall 1
- Prob C or Higher Overall 2
- Prob C or Higher Overall 3
- Prob C or Higher Overall 4
- Prob C or Higher Overall 5

- Prob C or Higher Courses 1
- Prob C or Higher Courses 2
- Prob C or Higher Courses 3
- Prob C or Higher Courses4
- Prob C or Higher Courses 5
- Pred GPA Overall 1
- Pred GPA Overall 2
- Pred GPA Overall 3
- Pred GPA Overall 4
- Pred GPA Overall 5
- Pred GPA Courses 1
- Pred GPA Courses 2
- Pred GPA Courses 3
- Pred GPA Courses4
- Pred GPA Courses 5
- Norms Type

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Context Definition Template: SAD_ACT_2020

SAD_ACT_2020 is used in the file mapping definition template SAD_ACT_TESTRESULTS_2020, and is a copy of the context definition template SAD_ACT.

File Mapping Definition Template: SAD_ACT_TESTRESULTS_2020

Important! You should not make any changes to this definition; any change renders the process unusable.

From September 2020, you must use this file mapping definition to post ACT test scores because the file layout has changed.

File Definition Tab: This definition uses a CSV file, with the comma as a delimiter and double quotation marks as text qualifiers. This uses the context and conversion definitions SAD_ACT_2020.

File Layout Tab: The layout is based on the 2020-2021 ACT College Score Reporting Service Layout.

Mapping Tab: The structure of the mapping here is the same as SAD_ACT_TESTRESULTS with a few changes.

- These are additional mapping records in this template:
 - SCC_STG_TESTCMP row 4 for Test Component SCI (previously SCIRE)
 - SCC_STG_TESTCMP row 6 for Test Component STEM
 - SCC_STG_TESTCMP row 8 for Test Component ELA
 - SCC_STG_TESTCMP row 9 for Test Component SSCOM
 - SCC_STG_TESTCMP row 10 for Test Component SSELA
 - SCC_STG_TESTCMP row 11 for Test Component SSENG
 - SCC_STG_TESTCMP row 12 for Test Component SSMAT
 - SCC_STG_TESTCMP row 13 for Test Component SSREA
 - SCC_STG_TESTCMP row 14 for Test Component SSSCI
 - SCC_STG_TESTCMP row 15 for Test Component SSTEM
 - SCC_STG_TESTCMP row 16 for Test Component SSWRI
 - SAD_STG_TST_CAF row 9 for Test Component ACT_SUPER_OTHER_ENG
 - SAD_STG_TST_CAF row 10 for Test Component ACT_SUPER_OTHER_MAT
 - SAD_STG_TST_CAF row 11 for Test Component ACT_SUPER_OTHER_SCI
 - SAD_STG_TST_CAF row 12 for Test Component ACT_SUPER_OTHER_REA
- This mapping record has been removed: SCC_STG_NID.
- PeopleCode for TestDate, SuperEnglishDate, SuperMathDate, SuperReadingDate, SuperScienceDate and SuperWritingDate: By default, the day of the date is set to “01”.
- PeopleCode for SuperEnglishScore, SuperMathScore, SuperReadingScore, SuperScienceScore and SuperWritingScore: If a row is not Super, the process throws a blank value; “Skip if Blank” is triggered.
- Because there's no Test Date for Super fields SSCOM, SSELA, SSTEM, ACT_SUPER_OTHER_ENG, ACT_SUPER_OTHER_MAT, ACT_SUPER_OTHER_SCI and ACT_SUPER_OTHER_REA, the Application Class ID TestDate is used.
- Make sure to populate the Value Conversion of Gender, Academic Level and Ethnicity based on the field conversion that you created.

See also:

- "Mapping the File and Converting the Data" (Campus Community Fundamentals)
- [Running the File Parser Process](#)

Common Attribute Framework for SAD_ACT_TESTRESULTS_2020

These common attributes have been added to the record context SAD_TESTDT. The sequence for these attributes is 81, 82, 83, and 84.

- ACT Super Other English Score
- ACT Super Other Math Score
- ACT Super Other Reading Score
- ACT Super Other Science Score

These test components need to be added to the Test Table with the Test ID *ACT*.

- SCI
- SSCOM
- SSELA
- SSENG
- SSMAT
- SSREA
- SSSCI
- SSTEM
- SSWRI

Advanced Placement (AP)

Delivered Transaction Code: SAD_AP

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_AP

Conversion examples have been delivered for the following fields:

- Academic Level based on incoming Educational Level value; used to populate the academic level for each test component.
- Admit Term based on incoming Expected College Entrance value.
- Canadian (CAN) Provinces based on incoming Country Code value.

- Country based on incoming Country Code value.
- Ethnicity based on incoming Ethnic Group value.
- Exam Code based on incoming Exam Code; used to populate test component.
- Gender based on incoming Sex value.

Each of these conversions may need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Note: Not all Country Codes have been mapped. Add rows as needed for the following incoming country values: 348 - Macedonia, The Former Yugoslav Republic of; 377 - Midway Islands; 550 - Tahiti; 625 - Montenegro or Serbia; 660 - Bonaire, Sint Eustatius and Saba; 665 - Curacao; 681 - Timor-Leste and 685 - South Sudan.

Note: The following incoming Ethnicity values were not mapped: 0 - Not Stated and 8 - Other.

Context Definition Template: SAD_AP

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_AP_TESTPROSPECT

This file mapping definition can be used to create prospects and populate test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_AP. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the AP layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_STD_CAR.ACAD_CAREER
- SAD_PRS_CAR_STG.ACAD_CAREER

- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_CAR_STG.CAMPUS
- SAD_PRS_PRG_STG.ACAD_CAREER
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.ACAD_PROG
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PRG_STG.CAMPUS
- SAD_PRS_PLN_STG.ACAD_CAREER
- SAD_PRS_PLN_STG.INSTITUTION
- SAD_PRS_PLN_STG.ACAD_PROG
- SAD_PRS_PLN_STG.ACAD_PLAN
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Thirty Rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Thirty rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Eight rows

Calculated Fields: The following calculated fields have been delivered for AP:

- SCC_STG_CONSTIT.BIRTHDATE - Removes zeros from birthdate which are delivered if the Date of Birth in position 142 is blank or invalid.
- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.STATE - Populates incoming State field value starting at position 127 when the country is USA. When country is CAN, the field is populated based on the Field Conversion definition *CAN Provinces*. For other countries, the STATE field is not populated.
- SAD_PRS_CAR_STG.ADM_RECR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.

- SAD_PRS_CAR_STG.LAST_SCH_ATTEND - Uses the incoming value from High School Code in position 213 to determine the EXT_ORG_ID to populate based on the EXT_ORG_TBL_ADM.ACT_CODE.

File Mapping Definition Template: SAD_AP_TESTRESULTS

This file mapping definition can be used to post AP test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_AP. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the AP layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Thirty Rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Thirty rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Eight rows

Calculated Fields: The following calculated fields have been delivered for AP:

- SCC_STG_CONSTIT.BIRTHDATE - Removes zeros from birthdate which are delivered if the Birthdate in position 142 is blank or invalid.
- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.STATE - Populates incoming State field value starting at position 127 when the country is USA. When country is CAN, the field is populated based on the Field Conversion definition *CAN Provinces*. For other countries, the STATE field is not populated.

Common Attribute Framework

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the SAD_TESTDT record context:

- AP_BEST_LANG for Best Language
- AP_DT_GRD_RTC for Date Grades Released to College
- AP_DT_LAST_STUP for Date of Last Student Update
- AP_DT_REPORT for Date of this report
- AP_NBR for AP Number
- AP_ORDER_IKEY for Ordering Institution Key
- AP_SERVICE_CODE for Service Code
- AP_SERVICE_TYPE for Service Type

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT or ADM_PRSPCT_CAR record context depending on your business process. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped upon initial delivery of the AP File Mapping Definitions include:

- Student Search
- Applying for Sophomore Standing
- Previous AI Year1
- Previous AI Code1
- Previous AI Year2
- Previous AI Code2
- Award Type1
- Award Year1
- Award Type2
- Award Year2
- Award Type3
- Award Year3
- Award Type4
- Award Year4
- Award Type5

- Award Year5
- Award Type6
- Award Year6
- High School Contact Name
- High School Name
- High School Address #1
- High School Address #2
- High School Address #3
- High School State
- High School ZIP Code
- College Code
- College Contact Name
- College Name
- College Address #1
- College Address #2
- College Address #3
- College State
- College ZIP Code
- The following fields are not mapped for each of the thirty exam sets:
 - Irregularity Code #1
 - Irregularity Code #2
 - Exam Suppression Flag
 - Class Section Code

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Law School Admission Test (LSAT)

Delivered Transaction Code: SAD_LSAT

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_LSAT

Conversion examples have been delivered for the following fields:

- Admit Term based on incoming Term Code value.
- Ethnicity based on incoming Ethnic Super Categories values.
- Gender based on incoming Gender value.

Each of these conversions may need to be modified based upon your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Note: The following incoming Ethnic Super Categories values were not mapped: CD - Canadian Aboriginal, AT - Aboriginal or Torres Strait Islander Australian and NI - Not Indicated.

Context Definition Template: SAD_LSAT

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_LSAT_TESTPROSPECT

This file mapping definition can be used to create prospects and populate test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_LSAT. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the LSAT layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE – 2 rows
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_STD_CAR.ACAD_CAREER
- SAD_PRS_CAR_STG.ACAD_CAREER
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_PRG_STG.ACAD_CAREER
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.ACAD_PROG
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PLN_STG.ACAD_CAREER
- SAD_PRS_PLN_STG.INSTITUTION
- SAD_PRS_PLN_STG.ACAD_PROG
- SAD_PRS_PLN_STG.ACAD_PLAN
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Twelve Rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Twelve rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Nine rows

Calculated Fields: The following calculated fields have been delivered for LSAT:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case. There are two calculated fields: one for Primary Name and one for Previous Last Name.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.

- SAD_PRS_CAR_STG.ADM_RECR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don't set up the Prospect Setup page, you will need to change this to a default recruiting center.

File Mapping Definition Template: SAD_LSAT_TESTRESULTS

This file mapping definition can be used to post LSAT test scores. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_LSAT. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

File Layout Tab: Review this tab to ensure the fields appear in the exact order as that of the LSAT layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_NID.NATIONAL_ID_TYPE
- SCC_STG_TEST.TEST_ID
- SCC_STG_TEST.CHKLST_ITM_UPDT
- SCC_STG_TESTCMP.TEST_ID – Twelve Rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Twelve rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Nine rows

Calculated Fields: The following calculated fields have been delivered for LSAT:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case. There are two calculated fields: one for Primary Name and one for Previous Last Name.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.

Common Attribute Framework:

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the SAD_TESTDT record context:

- LSAT_APPL_STATUS for Applicant Status
- LSAT_AVG3D_SCORE for Average 3-digit LSAT Score
- LSAT_LSAC_ACCTNBR for LSAC Account Number
- LSAT_MISCONDUCT for Misconduct Flag
- LSAT_PRIOR_SCHLNM_1 for Name of Law School 1
- LSAT_PRIOR_SCHL_1 for Prior Law School Matriculation 1
- LSAT_SCORE_UPDATE for Score Update
- LSAT_SCRBAND_LOWER for Score band - Lower
- LSAT_SCRBAND_UPPER for Score band - Upper

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT or ADM_PRSPCT_CAR record context depending on your business process. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped upon initial delivery of the LSAT File Mapping Definitions include:

- Law School Code #
- Date of Transmission
- Time Stamp
- Law School Social Sec/Ins Number
- Law School Last Name
- Law School First Name
- Law School Middle Initial
- Law School Tracking Number
- Age
- Foreign Address (City, Country, Zip)
- State of Permanent Residence
- Date of Future Test
- The following fields are not mapped for each of the twelve scores:
 - Score band - Upper

- Score band - Lower
- Irregularity Code
- Number of Valid 3-digit LSAT Scores
- Number of Valid 2-digit LSAT Scores
- Average 2-digit LSAT Score
- Date File Completed
- Misconduct Update
- Prior Matriculation Update
- Prior Matriculation School Code 1
- Prior Law School Matriculation 2
- Prior Matriculation School Code 2
- Name of Law School 2
- Prior Law School Matriculation 3
- Prior Matriculation School Code 3
- Name of Law School 3
- Term Year
- Ethnic Sub Categories

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Student Search Service (SSS)

Delivered Transaction Code: SAD_SSS

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes, and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_SSS

Conversion examples have been delivered for the following fields:

- Academic Interest based on incoming Major Choice values.
- Academic Plan based on incoming Major Choice values.
- Academic Program based on incoming Major Choice values.
- Admit Term based on incoming Grad Year value.
- Ethnicity based on incoming Ethnicity value.

Each of these conversions may need to be modified based on your internal values. Either create a new field conversion definition or copy the delivered definition and modify as needed.

Context Definition Template: SAD_SSS

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used in the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_SSS_PROSPECTS

This file mapping definition can be used to create prospects and supporting data such as academic interests. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context definition as SAD_SSS. If you change this, all the file layout and mapping setup will disappear.

Modify the conversion definition to the one you have created.

Change the delimiter if needed based on your file characteristics.

File Layout Tab:

Review this tab to ensure the fields appear in the exact order as that of the SSS layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending on your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_STD_CAR.ACAD_CAREER
- SAD_PRS_CAR_STG.ACAD_CAREER
- SAD_PRS_CAR_STG.INSTITUTION

- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_STG_PRS_CAF.ACAD_CAREER – Eight Rows
- SAD_STG_PRS_CAF.INSTITUTION – Eight Rows
- SAD_PRS_PRG_STG.ACAD_CAREER
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PLN_STG.ACAD_CAREER
- SAD_PRS_PLN_STG_PRG.INSTITUTION
- SCC_STG_ADMIHD.ACAD_CAREER
- SCC_STG_ADMINT.ACAD_CAREER – Five rows

Calculated Fields. The following calculated fields have been delivered for SSS:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.COUNTRY – Uses the incoming value from Country Name in position 334 - 362 to determine the three character Country value to populate from COUNTRY_TBL.
- SAD_PRS_CAR_STG.ADM_RCR_CTR – Looks at the prospect setup you have defined to determine recruiting center. If you did not set up the Prospect Setup page, you will need to change this to a default recruiting center.
- SAD_PRS_CAR_STG.LAST_SCH_ATTEND - Uses the incoming value from AI Code in position 434 to determine the EXT_ORG_ID to populate based on the EXT_ORG_TBL_ADM.ATP_CODE.
- SCC_STG_ADMINT.DESCR - Derive the academic interest description based on the External Subject Area populated.

Note: If you have purchased names based on AP Test Takers, it is suggested that you delete the row for SCC_STG_ADMIHD and 5 rows for SCC_STG_ADMINT as the Major Choice data is not provided in the data file.

Field Conversion Definitions. If you changed the Conversion Definition on the File Definition tab, you will need to repopulate the conversion fields on the Value Conversion tab of the Field Mapping Detail for the following fields:

- SCC_STG_DIV_ETH.ETHNIC_GRP_CD – Ethnicity Conversion Field
- SCC_STG_ETH_DTL.ETHNIC_GRP_CD – Ethnicity Conversion Field
- SAD_PRS_CAR_STG.ADMIT_TERM – Admit Term Conversion Field

- SAD_PRS_PRG_STG.ACAD_PROG – Academic Program Conversion Field
- SAD_PRS_PLN_STG.ACAD_PROG – Academic Program Conversion Field
- SAD_PRS_PLN_STG.ACAD_PLAN – Academic Plan Conversion Field
- SCC_STG_ADMINT.EXT_SUBJECT_AREA (Five Rows) – Academic Interest Conversion Field

Common Attribute Framework

The following sample common attributes have been delivered for the incoming field indicated. These attributes should be associated with the ADM_PRSPCT_CAR record context:

- SSS_POSTAL_DEL_PT for Postal Delivery Point
- SSS_POSTAL_COR_CHAR for Postal Correction Character
- SSS_GEOMKT_CODE for Geomarket Code
- SSS_MR_CB_EXAM for Most Recent CB Exam
- SSS_HOMESCH_IND for Homeschooled Indicator
- SSS_COUNTRY_NAME for Country Name
- SSS_SEGA_HS_CLUSTER for Segment Analysis HS Cluster
- SSS_SEGA_EN_CLUSTER for Segment Analysis EN Cluster

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the ADM_PRSPCT_CAR record context. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component. Additional fields that were not mapped include:

- Order Number
- Run Code
- Student ID
- County Code
- AP Exam Code 1
- AP Exam Code 2
- AP Exam Code 3
- AP Exam Code 4
- AP Exam Code 5
- AP Exam Code 6
- AP Exam Code 7
- AP Exam Code 8

- AP Exam Code 9
- AP Exam Code 10
- SAT Subject Test Code 1
- SAT Subject Test Code 2
- SAT Subject Test Code 3
- SAT Subject Test Code 4
- SAT Subject Test Code 5
- SAT Subject Test Code 6
- SAT Subject Test Code 7
- SAT Subject Test Code 8
- SAT Subject Test Code 9
- SAT Subject Test Code 10
- Last Update Date
- Low SES

To complete the setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Scholastic Aptitude Test (SAT)

Note: Refer Doc ID 1997021.1 on My Oracle Support for detailed information on updated PDL templates based on the redesigned SAT layout effective from October 2015. The 2015 SAT Mapping Workbook contains all of the following information, updated for the revised SAT layout.

Delivered Transaction Code: SAD_SAT

Modify the delivered transaction as follows:

- Update the data update rule with one defined by your institution based on your constituent data update policies.
- Search/Match Setup: Update the search parameter, search result codes and update rules based on your institution's needs.

File Parser Field Conversion Definition Template: SAD_SAT

Conversion examples are delivered for the following fields:

- Academic Interest based on incoming First Choice Major, Other Major 1, Other Major 2, Other Major 3 and Other Major 4 values.
- Academic Level based on incoming Academic Level value.
- Academic Plan based on incoming First Choice Major value.
- Academic Program based on incoming First Choice Major value.
- Admit Term based on incoming Year of H.S. Graduation Date value.
- Art (College Activity Description) based on incoming Art value.
- Athletics: Intramural/Club (College Activity Description) based on incoming Athletics: Intramural or Club Sports value.
- Athletics: Varsity Sports (College Activity Description) based on incoming Athletics: Varsity Sports value.
- Citizenship based on incoming Citizenship value.
- Community/Service Organization (College Activity Description) based on incoming Community or Service Organization value.
- Cooperative Work/Internship (College Activity Description) based on incoming Cooperative Work or Internship Program value.
- Country based on incoming Country value.
- Dance (College Activity Description) based on incoming Dance value.
- Debating or Public Speaking (College Activity Description) based on incoming Debating or Public Speaking value.
- Departmental Organization (College Activity Description) based on incoming Departmental Organization value.
- Drama or Theater (College Activity Description) based on incoming Drama or Theater value.
- Environmental/Ecology Activity (College Activity Description) based on incoming Environmental or Ecology Activity value.
- Ethnic Activity or Clubs (College Activity Description) based on incoming Ethnic Activity or Clubs
- Ethnicity based on incoming Ethnic value in position 994.
- Financial Aid based on incoming Financial Aid value.
- Foreign Study or Study Abroad (College Activity Description) based on incoming Foreign Study or Study Abroad Program value.
- Fraternity Sorority/Social Club (College Activity Description) based on incoming Fraternity, Sorority, or Social Club value.
- Gender based on incoming Sex value.

- Honors Prog/Independent Study (College Activity Description) based on incoming Honors Program or Independent Study value.
- Instrumental Music (College Activity Description) based on incoming Instrumental Music Performance value.
- Journalism/Literary Activity (College Activity Description) based on incoming Journalism/Literary Activity value.
- Planned Housing based on incoming Planned Housing value.
- ROTC (College Activity Description) based on incoming ROTC value.
- Religious Activity (College Activity Description) based on incoming Religious Activity value.
- Religious Preference based on incoming Religion value.
- Student Government (College Activity Description) based on incoming Student Government value.
- Test Component based on incoming Subject Test Code.
- Vocal Music (College Activity Description) based on incoming Vocal Music Performance value

Each of these conversions may need to be modified based on your internal values. Modify the delivered version as it will be used on the File Mapping Definition component. Before modifying, make sure you create a copy so that you have the original version.

Context Definition Template: SAD_SAT

Review the delivered template and determine if any records need to be added. Modify this delivered version. It will be used on the File Mapping Definition component. Create a copy before doing so to keep an original version. If you choose to use a copy of a delivered context definition and reference the copied version in your file mapping definition, the system forces you to redefine the file layout and file mapping setup.

File Mapping Definition Template: SAD_SAT_TESTPROSPECT

This file mapping definition can be used to create prospects, populate test scores and populate supporting data such as academic interests and extracurricular activities. You will need to make changes to this delivered template to reflect institution defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context and conversion definitions as SAD_SAT. If you change this, all the file layout and mapping setup will disappear.

If needed, change the delimiter based on your file characteristics.

File Layout Tab:

Review this tab to ensure that fields appear in the exact order as that of the SAT layout you are using. Also modify the default Date Day and Date Month values for Year of H.S. Graduation.

Mapping Tab:

The default values for the following fields need to be reviewed and probably modified depending upon your institution's business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE
- SCC_STG_STD_CAR.ACAD_CAREER
- SAD_PRS_CAR_STG.ACAD_CAREER
- SAD_PRS_CAR_STG.INSTITUTION
- SAD_PRS_CAR_STG.RECRUITING_STATUS
- SAD_PRS_CAR_STG.ADM_REFRL_SRCE
- SAD_PRS_CAR_STG.ACADEMIC_LEVEL
- SAD_PRS_CAR_STG.CAMPUS
- SAD_STG_PRS_CAF.ACAD_CAREER – Six rows
- SAD_STG_PRS_CAF.INSTITUTION – Six rows
- SAD_PRS_PRG_STG.ACAD_CAREER
- SAD_PRS_PRG_STG.INSTITUTION
- SAD_PRS_PRG_STG.RECRUITING_STATUS
- SAD_PRS_PRG_STG.CAMPUS
- SAD_PRS_PLN_STG.ACAD_CAREER
- SAD_PRS_PLN_STG.INSTITUTION
- SCC_STG_ADMIHD.ACAD_CAREER
- SCC_STG_ADMINT.ACAD_CAREER – Five rows
- SCC_STG_ADMINT.LS_DATA_SOURCE – Five rows
- SCC_STG_TEST.TEST_ID – Two rows
- SCC_STG_TESTCMP.TEST_ID – Forty Eight Rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Thirty rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Forty Eight rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Seven rows

Calculated Fields: The following calculated fields have been delivered for SAT:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.COUNTRY – Interrogates Foreign Address Indicator in position 135. If ‘Y’ then populates COUNTRY from field conversion COUNTRY, otherwise uses USA.
- SCC_STG_ADDR.STATE – Populates STATE position 92-93 if Country = CAN or USA. For all other countries, STATE is not populated.
- SCC_STG_ADDR.POSTAL – Populates POSTAL position 95 – 103 only if Country = USA.
- SAD_PRS_CAR_STG.ADM_RECR_CTR - Looks at the prospect setup you have defined to determine recruiting center. If you don’t set up the Prospect Setup page, you will need to change this to a default recruiting center.
- SAD_PRS_CAR_STG.LAST_SCH_ATTEND - Uses the incoming value from High School Code Number in position 1016 to determine the EXT_ORG_ID to populate based on the EXT_ORG_TBL_ADM.ACT_CODE.
- SCC_STG_ADMINT.DESCR – Derives the academic interest description DESCR based on the incoming First Choice Major starting at position 933, Other Major 1 starting at position 937, Other Major 2 starting at position 940, Other Major 3 starting at position 943, Other Major 4 starting at position 946, from table EXT_SUBJECT_TBL.
- SCC_STG_TEST.CHLST_ITM_UPDT for second row where Test ID = SATII – Interrogates incoming Subject Test Codes to determine if this row of SCC_STG_TEST should be created. If codes are not present, the row is not created.

File Mapping Definition Template: SAD_SAT_TESTRESULTS

This file mapping definition can be used to post SAT test scores. You will need to make changes to this delivered template to reflect institution-defined default values. Before doing so, make a copy of the delivered template.

File Definition Tab:

Important! Leave the context and conversion definitions as SAD_SAT. If you change this, all the file layout and mapping setup will disappear.

If needed, change the delimiter based on your file characteristics.

File Layout Tab:

Review this tab to ensure the fields appear in the exact order as that of the SAT layout you are using.

Mapping Tab:

The default values for the following fields will need to be reviewed and probably modified depending upon your institution’s business practices:

- SCC_STG_NAMES.NAME_TYPE
- SCC_STG_ADDR.ADDRESS_TYPE
- SCC_STG_EMAIL.E_ADDR_TYPE
- SCC_STG_PHONE.PHONE TYPE
- SCC_STG_ETH_DTL.HISP_LATINO
- SCC_STG_TEST.TEST_ID – Two rows
- SCC_STG_TESTCMP.TEST_ID – Forty Eight Rows
- SCC_STG_TESTCMP.TEST_COMPONENT – Thirty rows
- SCC_STG_TESTCMP.LS_DATA_SOURCE – Forty Eight rows
- SCC_STG_TESTDT.TEST_ID
- SAD_STG_TST_CAF.TEST_ID – Seven rows

Calculated Fields: The following calculated fields have been delivered for SAT:

- SCC_STG_NAMES.LAST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_NAMES.FIRST_NAME_SRCH - Removes all special characters and puts the field into upper case.
- SCC_STG_ADDR.COUNTRY – Interrogates Foreign Address Indicator in position 135. If ‘Y’ then populates COUNTRY from field conversion COUNTRY, otherwise uses USA.
- SCC_STG_ADDR.STATE – Populates STATE position 92-93 if Country = CAN or USA. For all other countries, STATE is not populated.
- SCC_STG_ADDR.POSTAL – Populates POSTAL position 95 – 103 only if Country = USA.
- SCC_STG_TEST.CHKLST_ITM_UPDT for second row where Test ID = SATII. – Interrogates incoming Subject Test Codes to determine if this row of SCC_STG_TEST should be created. If no codes are present, the row is not created.

Common Attribute Framework

The following sample common attributes have been delivered for the incoming field indicated.

These attributes should be associated with the SAD_TESTDT record context:

- SAT_REV_SC_IND1 for SAT Revised Score Indicator 1
- SAT_LAT_ESS_ID for Latest SAT Essay ID
- SAT_ESS_ID_AD2 for SAT Essay ID Admin 2
- SAT_ESS_ID_AD3 for SAT Essay ID Admin 3
- SAT_READ_ST_PCT for Reading State Percentile

- SAT_MATH_ST_PCT for Mathematics State Percentile
- SAT_WR_ST_PCT for Writing State Percentile

These attributes should be associated with the ADM_PRSPCT_CAR record context:

- SAT_GRD_PT_AVG for Grade Point Average
- SAT_HS_CLASSRANK for High School Class Rank
- SAT_DEGR_GOAL for Degree Goal
- SAT_PART_TM_JOB for Part-Time Job
- SAT_FIRST_LANG for First Language
- SAT_BEST_LANG for Best Language

Set up additional common attributes for other fields that have not been mapped on the File Mapping Definition component. Add each new attribute to the SAD_TESTDT or ADM_PRSPCT_CAR record context depending on your business process. In addition to creating the common attribute and adding them to the record context, you will need to add rows for each common attribute on the File Mapping Definition component.

Additional fields that were not mapped upon initial delivery of the SAT File Mapping Definitions include:

- College Code
- Residence Code
- EPS Market
- Foreign Address Indicator
- SAT Revised Score Indicator 2
- SAT Revised Score Indicator 3
- SAT Revised Score Indicator 4
- SAT Revised Score Indicator 5
- SAT Revised Score Indicator 6
- Revised Score Indicator 1
- Subject Test 1-1 Subscore 1
- Subject Test 1-1 Subscore 2
- Subject Test 1-1 Subscore 3
- Subject Test 1-2 Subscore 1
- Subject Test 1-2 Subscore 2
- Subject Test 1-2 Subscore 3

- Subject Test 1-3 Subscore 1
- Subject Test 1-3 Subscore 2
- Subject Test 1-3 Subscore 3
- Subject Test 2-1 Subscore 1
- Subject Test 2-1 Subscore 2
- Subject Test 2-1 Subscore 3
- Subject Test 2-2 Subscore 1
- Subject Test 2-2 Subscore 2
- Subject Test 2-2 Subscore 3
- Subject Test 2-3 Subscore 1
- Subject Test 2-3 Subscore 2
- Subject Test 2-3 Subscore 3
- Subject Test 3-1 Subscore 1
- Subject Test 3-1 Subscore 2
- Subject Test 3-1 Subscore 3
- Subject Test 3-2 Subscore 1
- Subject Test 3-2 Subscore 2
- Subject Test 3-2 Subscore 3
- Subject Test 3-3 Subscore 1
- Subject Test 3-3 Subscore 2
- Subject Test 3-3 Subscore 3
- Subject Test 4-1 Subscore 1
- Subject Test 4-1 Subscore 2
- Subject Test 4-1 Subscore 3
- Subject Test 4-2 Subscore 1
- Subject Test 4-2 Subscore 2
- Subject Test 4-2 Subscore 3
- Subject Test 4-3 Subscore 1
- Subject Test 4-3 Subscore 2
- Subject Test 4-3 Subscore 3

- Subject Test 5-1 Subscore 1
- Subject Test 5-1 Subscore 2
- Subject Test 5-1 Subscore 3
- Subject Test 5-2 Subscore 1
- Subject Test 5-2 Subscore 2
- Subject Test 5-2 Subscore 3
- Subject Test 5-3 Subscore 1
- Subject Test 5-3 Subscore 2
- Subject Test 5-3 Subscore 3
- Subject Test 6-1 Subscore 1
- Subject Test 6-1 Subscore 2
- Subject Test 6-1 Subscore 3
- Subject Test 6-2 Subscore 1
- Subject Test 6-2 Subscore 2
- Subject Test 6-2 Subscore 3
- Subject Test 6-3 Subscore 1
- Subject Test 6-3 Subscore 2
- Subject Test 6-3 Subscore 3
- Reading State Percentile
- Mathematics State Percentile
- Writing State Percentile
- Subject Test 1 Subscore 1 %ile
- Subject Test 1 Subscore 2 %ile
- Subject Test 1 Subscore 3 %ile
- Subject Test 2 Subscore 1 %ile
- Subject Test 2 Subscore 2 %ile
- Subject Test 2 Subscore 3 %ile
- Subject Test 3 Subscore 1 %ile
- Subject Test 3 Subscore 2 %ile
- Subject Test 3 Subscore 3 %ile

- Arts and Music Years
- English Years
- Foreign and Classical Languages Years
- Mathematics Years
- Natural Sciences Years
- Social Sciences and History Years
- Chinese Years
- French Years
- German Years
- Greek Years
- Hebrew Years
- Italian Years
- Japanese Years
- Korean Years
- Latin Years
- Russian Years
- Spanish Years
- Other Language Course Years
- Algebra Years
- Geometry Years
- Trigonometry Years
- Precalculus Years
- Calculus Years
- Computer Math (no longer reported) Years
- Other Math Course Years
- Biology Years
- Chemistry Years
- Environmental, Earth, or Space Science Years
- Physics Years
- Other Science Course Years

- U.S. History Years
- U.S. Gov't/Civics Years
- European History Years
- World History Years
- Ancient History Years
- Anthropology (no longer reported) Years
- Economics Years
- Geography Years
- Psychology Years
- Sociology Years
- Other Social Science or History Course Years
- Arts and Music GPA
- English GPA
- Foreign and Classical Languages GPA
- Mathematics GPA
- Natural Sciences GPA
- Social Sciences and History GPA
- American Literature
- British Literature
- Composition
- English Language Arts
- Literature (other than US or British)
- Communications
- Public Speaking
- English as a Second Language
- Art/Music no experience
- Acting/Production of a Play
- Art Hist. or Appreciation
- Dance
- Drama or Theater for Appreciation

- Music History, Theory, or Appreciation
- Music, Instrumental or Vocal Performance
- Photography or Filmmaking
- Studio Art and Design
- Computer No Experience
- Computer Basic Concepts
- Computer Word Processing
- Computer Programming
- Computer Use Spreadsheets/Databases
- Computer Graphics
- Computer Internet Activities
- High School/Community/Activities
- H.S. Activity Designator 1
- 9th Grade Activity 1
- 10th Grade Activity 1
- 11th Grade Activity 1
- 12th Grade Activity 1
- Office/Award Activity 1
- H.S. Activity Designator 2
- 9th Grade Activity 2
- 10th Grade Activity 2
- 11th Grade Activity 2
- 12th Grade Activity 2
- Office/Award Activity 2
- H.S. Activity Designator 3
- 9th Grade Activity 3
- 10th Grade Activity 3
- 11th Grade Activity 3
- 12th Grade Activity 3
- Office/Award Activity 3

- H.S. Activity Designator 4
- 9th Grade Activity 4
- 10th Grade Activity 4
- 11th Grade Activity 4
- 12th Grade Activity 4
- Office/Award Activity 4
- H.S. Activity Designator 5
- 9th Grade Activity 5
- 10th Grade Activity 5
- 11th Grade Activity 5
- 12th Grade Activity 5
- Office/Award Activity 5
- H.S. Activity Designator 6
- 9th Grade Activity 6
- 10th Grade Activity 6
- 11th Grade Activity 6
- 12th Grade Activity 6
- Office/Award Activity 6
- H.S. Activity Designator 7
- 9th Grade Activity 7
- 10th Grade Activity 7
- 11th Grade Activity 7
- 12th Grade Activity 7
- Office/Award Activity 7
- H.S. Activity Designator 8
- 9th Grade Activity 8
- 10th Grade Activity 8
- 11th Grade Activity 8
- 12th Grade Activity 8
- Office/Award Activity 8

- H.S. Activity Designator 9
- 9th Grade Activity 9
- 10th Grade Activity 9
- 11th Grade Activity 9
- 12th Grade Activity 9
- Office/Award Activity 9
- H.S. Activity Designator 10
- 9th Grade Activity 10
- 10th Grade Activity 10
- 11th Grade Activity 10
- 12th Grade Activity 10
- Office/Award Activity 10
- Sports
- Sport Designator 1
- Sport Designator 2
- Sport Designator 3
- Sport Designator 4
- Sport Designator 5
- Sport Designator 6
- 4-Year College or University
- 2-Year Community or Junior College
- Vocational/Technical School
- 2 or 4 Year Undecided
- Public University or College
- Private University or College (not religiously affiliated)
- Private, Religiously Affiliated University or College
- Private, Public Undecided
- Fewer than 2,000 Students
- 2,000–5,000 Students
- 5,000–10,000 Students

- 10,000–20,000 Students
- More than 20,000 Students
- Size Undecided
- Large City or Metropolitan Area
- Medium-Size City
- Small City or Town
- Suburban Community
- Rural
- Setting Undecided
- Close to Home
- In My Home State
- In States Bordering Mine
- Beyond States Bordering Mine
- Outside of the U.S
- Location Undecided
- All Women or All Men
- Coeducational
- Type Undecided
- Art AP or Exempt
- Biology AP or Exempt
- Chemistry AP or Exempt
- Computer Science AP or Exempt
- English AP or Exempt
- Foreign Language AP or Exempt
- Humanities AP or Exempt
- Mathematics AP or Exempt
- Music AP or Exempt
- Physics AP or Exempt
- Social Studies AP or Exempt
- No Plans to Apply AP or Exempt

- Educational Plans Requested Services
- Career Plans Requested Services
- Study Skills Requested Services
- Math Skills Requested Services
- Reading Skills Requested Services
- Writing Skills Requested Services
- No Plans for Help Requested Services
- High School Name
- High School Address 1
- High School Address 2
- High School Address 3
- High School Telephone Number
- High School Type
- Senior Class Size
- Percent of Seniors Going to College
- Location of High School
- Number of Advanced Placement Program® Courses Offered
- Honors Courses Offered
- Units to Graduate
- Date of Report

To complete setup for the delivered common attributes, see:

- [Setting Up Common Attribute Framework](#)
- [Setting Up Filtering for Common Attributes](#)

Setting Up External Test Score Loads

Understanding External Test Score Loads Setup

Important! Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

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

- Define external test components.
- Define external tests.
- Define and review external data setup tables.
- Map external test IDs.
- Map external test codes to internal codes.

In addition to the above, if you want to post to PeopleSoft CRM you must enable the posting to CRM option.

Enabling the Posting to CRM Option

Important! Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

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

This example illustrates the fields and controls on the SA Features page.

The screenshot shows the 'SA Features' tab in the 'Installation Student Administration' interface. The page is divided into several sections, each with a blue header and a light gray body containing checkboxes and text fields.

- CRM Integration**: Contains a checked checkbox for 'CRM for Higher Education'.
- Australia**: Contains a checked checkbox for 'DEST, HECS, Centrelink, TAC' and a text field for 'Last CART Request ID' with the value '0'.
- Canada**: Contains two checked checkboxes: 'Government Reporting' and 'OUAC'.
- New Zealand**: Contains a checked checkbox for 'NSI and SDR Personal Data, SDR Degree'.
- The Netherlands**: Contains an unchecked checkbox for 'Use Dutch Functionality'.
- United Kingdom**: Contains a checked checkbox for 'HESA, UCAS'.

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

Defining External Test Components

Important! Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

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

Page Used to Define External Test Components

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

Defining External Tests

Important! Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

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

Page Used to Define External Tests

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

Defining External Tests

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

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

Test Tables

Test ID: GRE

Find | View All First 1 of 1 Last

*Effective Date: 08/01/2011 *Status: Active

*Description: Graduate Record Exam

Short Description: GRE

Testing Agency: Educational Testing Service

Entity ID: SCC_ENTITY_20130530111204

Find | View All First 1-4 of 21 Last

*Component	*Description	*Short Desc	Min Score	Max Score	Subtest
BC	Biochem, Cell, Molec Biolog	Biochem	200.00	990.00	
BCS	Biochemistry Subscore	Biochem Sb	20.00	99.00	
BY	Biology	Biology	200.00	990.00	
CBS	Cell Biology Subscore	Cell Bio S	20.00	99.00	

Field or Control	Description
Testing Agency	Select the testing agency that administers this test (if applicable). This field is for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are <i>American College Testing</i> , <i>College Board</i> , <i>Educational Testing Services</i> , and <i>Law School Admission Services</i> .
Entity ID	The system populates this field with the entity ID created in the Entity Registry component. See "Understanding Entity Registry" (Campus Community Fundamentals) See Understanding the Entity Registry Impacts
Component	Enter the test components that you want to link to this academic test. The system populates the descriptions based on the code that you select. Define test components on the Test Component Table page.

Field or Control	Description
Min Score/Max Score (minimum score/maximum score)	Enter a test score range for each component.
Subtest	Enter the code used for TS130 or TS189 processing of test scores.

Defining and Reviewing External Data Setup Tables

Important! Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

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

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

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

This section discusses how to:

- Map AMCAS ethnic groups.
- Map AMCAS country codes.
- Map SAT country codes.
- Map ethnicity codes.
- Map GMAT state/province codes.

Pages Used to Review External Data Setup Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
AP Subject Test Codes	AP_SUBJECT_CODE	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > AP Subject Test Codes	<p>Define or review the delivered AP subject test codes or to add or edit a code. This table stores the test codes used on the AP test.</p> <p>You can link your own codes and descriptions to these codes so that the system displays your codes after the scores are posted. Use the AP Subjects section on the External Test Score Load page to link your subject test components to the delivered codes.</p>
AP Country Codes	SAD_AP_CNTRY_TBL	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > AP Country Codes	<p>Translates the AP country values to internal PeopleSoft country values during the AP-specific load routine.</p> <p>The AP Country Codes table is delivered with known values set as of the date of this publication. You might need to add or delete rows to accurately maintain the table in the future.</p>
ADA Country Table	ADA_COUNTRY_TBL	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > ADA Country Codes	<p>Define or review the AADAS country code. Before processing the ADA external test score load, use the Country field to map AADAS country codes used on the ADA to PeopleSoft country codes.</p> <hr/> <p>Note: This setup is relevant only for posting to Campus Solutions. The system does not support posting ADA test scores to CRM therefore this setup is not needed for posting test scores to CRM.</p> <hr/>
CRS Major Codes	CRS_MJR_CD_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > CRS Major Codes	Review the delivered CRS major codes or add or edit a code.

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

Page Name	Definition Name	Navigation	Usage
AMCAS Country Mapping	SAD_AMC_CNT_MAP	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > AMCAS Setup > AMCAS Country Mapping	<p>Map the AMCAS country code values to the corresponding PeopleSoft country code values.</p> <hr/> <p>Note: This setup is relevant only for posting to Campus Solutions. The system does not support posting AMCAS test scores to CRM therefore this setup is not needed for posting test scores to CRM.</p> <hr/>
SAT Country Codes	SAD_SAT_CNTRY_TBL	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > SAT Setup > SAT Country Codes	Translates the SAT country values to internal PeopleSoft country values during the SAT specific load routine.
SAT Math Recentered Values	SAT_MATH_RECENTER	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > SAT Setup > SAT Math Recentered Values	<p>Review or edit the recentered SAT math score values. When you process SAT math scores, the system recenters some of the scores (as indicated by the SAT load) according to the values in this table. When the system recenters scores, only the recentered scores post to the person's record.</p> <p>The system displays the score it receives from the testing agency in the Math Score field. The translated score appears in the Recentered Math Score field. This is the score that the reported score is translated to when it is processed.</p>

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

Page Name	Definition Name	Navigation	Usage
GMAT State/Province Codes	SAD_GMT_STATE_TBL	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > GMAT State/Province Codes	Define or review the mapping of GMAT State/Province codes to PeopleSoft State/Province codes.

Mapping AMCAS Ethnic Groups

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

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

AMCAS Ethnicity Map

Test ID: MCAT Medical College Admission Test

Application Year: 2006

*Regulatory Region: USA United States

Copy Ethnicity Map to New Application Year

Customize Find View All First 1 of 1 Last			
	<u>Ethnic Group</u>	<u>Description</u>	<u>AMCAS Race Code</u>
1	ASIAN	Asian	AC

Field or Control	Description
Ethnic Group	Enter the internal ethnic group value that corresponds to the race code.
AMCAS Race Code	Enter the external AMCAS race code.
Copy Ethnicity Map to New Application Year	Click to copy ethnicity mapping data from one application year to another. The system prompts you for the new year value.

Mapping AMCAS Country Codes

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

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

AMCAS Country Mapping

Application Year: 2007

[Copy Country Map to New Application Year](#)

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

Field or Control	Description
Copy Country Map to New Application Year	The country code mappings are keyed by application year. Click this button to copy values from one application year to a new application year. You might need to add or delete rows to accurately maintain the table in the future.

Some AMCAS country codes do not have equivalent PeopleSoft country codes. Hence, these are not delivered. Your institution must determine the mappings for these values.

Mapping SAT Country Codes

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

This example illustrates the fields and controls on the SAT Country Codes page (top of page). You can find definitions for the fields and controls later on this page.

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

This example illustrates the fields and controls on the SAT Country Codes page (bottom of page). You can find definitions for the fields and controls later on this page.

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

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

Field or Control	Description
SAT Country Code and SAT Country Description	SAT country codes, descriptions and their corresponding PeopleSoft country codes are delivered in the table.
State/Province	If a state or province is associated with the specific SAT code, that state or province is also delivered in the table.

Mapping Ethnicity Codes

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

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

Ethnicity Map

Test ID ACT ACT Assessment
Regulatory Region USA United States

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

Field or Control	Description
Ethnic Group	Enter the ethnic group code that corresponds to the testing agency code. Ethnicity group codes are defined on the Ethnicity Group Table page.
Ethnicity	Enter the ethnicity code provided by the testing agency. You must contact the testing agency for these codes or refer to the test score layout provided by the testing agency.

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

See [Mapping AMCAS Ethnic Groups](#).

Mapping GMAT State/Province Codes

Access the GMAT State/Province Codes page (**Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > GMAT State/Province Codes**).

This example illustrates the fields and controls on the GMAT State/Province Codes page. You can find definitions for the fields and controls later on this page.

GMAT State/Province Codes					
Country BRA Brazil					
Personalize Find View All First 1-20 of 22 Last					
	GMAT - State/Province	State / Province	Description		
1	AL	AL	Alagoas		
2	AM	AM	Amazonas		
3	BA	BA	Bahia		
4	CE	CE	Ceara		
5	DF	DF	Distrito Federal		
6	ES	ES	Espirito Santo		
7	GO	GO	Goiias		
8	MA	MA	Maranhao		
9	MS	MS	Mato Grosso do Sul		
10	MT	MT	Mato Grosso		
11	PA	PA	Para		
12	PB	PB	Paraiba		
13	PE	PE	Pernambuco		
14	PI	PI	Piaui		
15	PR	PR	Parana		
16	RJ	RJ	Rio do Janeiro		
17	RN	RN	Rio Grande Do Norte		
18	RO	RO	Rondonia		
19	RS	RS	Rio Grande Do Sul		
20	SC	SC	Santa Catarina		

Use this page to define or review the mapping of GMAT State/Province codes to PeopleSoft State/Province codes for the following countries: Australia, Brazil, Canada, China, India, Japan, Mexico and the United States.

For the country of Pakistan, State/Province values do not exist in the PeopleSoft State/Province Table. You must therefore map the GMAT State/Province codes for Pakistan to the State/Province codes that you have set up for Pakistan in Campus Solutions.

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

Mapping External Tests IDs

Important! Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

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

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

Understanding External Test ID Mapping

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

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

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

Page Used to Map External Tests IDs to PeopleSoft Test Codes

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

Mapping External Tests IDs to PeopleSoft Test Codes

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

This example illustrates the fields and controls on the External Test Score Mapping page. You can find definitions for the fields and controls later on this page.

External Test Score Mapping

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

Mapping
[Customize](#) | [Find](#) | [View All](#) |

First 1 of 1 Last

Test ID			
ACT		ACT Assessment	<input checked="" type="checkbox"/> <input type="checkbox"/>

Suspense Records
[Customize](#) | [Find](#) | [View All](#) |

First 1-4 of 4 Last

Record (Table) Name	Record Description	Primary		
SAD_ACT_SUS	ACT Suspense File	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAD_ACT_SUS_COL	ACT Suspense College Extracur	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAD_ACT_SUS_HS	ACT Suspense HS Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAD_ACT_SUS_STD	ACT Suspense Years of Study	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Candidate Data Records
[Customize](#) | [Find](#) | [View All](#) |

First 1-4 of 4 Last

Record (Table) Name	Record Description	Primary		
SAD_ACT_CD	ACT Student Profile Section	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAD_ACT_CD_COL	ACT SPS College Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAD_ACT_CD_HS	ACT SPS High School Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAD_ACT_CD_STD	ACT SPS Years Studied	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Field or Control	Description
Test ID	Enter a test ID for each PeopleSoft test code. If you have more than one test ID affiliated to the PeopleSoft test code, add a row and enter the additional test ID.
Available for CRM Post	Indicates whether the scores for the test ID can be posted to PeopleSoft CRM. For example, you can post ACT, AP, CRS, DAT, EOS, GMS, GMT, GRE, LSAT, SAT, SSS and TOEFL scores to CRM, therefore, the system selects the Available for CRM Post check box for these test IDs. Conversely, you cannot post ADA, AMCAS, LSDAS, NCEA, OUAC, QTAC, SATAC, Studielink, UAC, and VTAC test scores to CRM, therefore, the system does not select the Available for CRM Post check box for these test IDs.

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

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

Mapping External Test Codes to Internal Codes

Important! Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

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

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

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

Related Links

[Creating Prospects When Posting External Test Scores](#)

Understanding External Test Data Mapping

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

Map the following codes:

- Academic interest.

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

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

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

- Extracurricular activity.

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

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

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

- Religious preference

Set up religious preference codes on the Religious Preference Table page. When you create prospects from external test loads, the system populates the Religious Preference page for each new prospect

that the system creates from the external test score load based on the data populated in the Test Score Candidate Data component. This data is provided by the students when they take the specific tests.

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

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

Pages Used to Map External Test Codes to Internal Codes

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

Page Name	Definition Name	Navigation	Usage
Religious Preference Map	SAD_REL_MAP	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Create Prospects Setup > Religious Preference Map	Map the religious preference codes provided by the ACT and ETS testing agencies to the corresponding PeopleSoft codes to capture religious preference information when creating prospects from ACT or SAT test score loads. Set up this page only if you want to capture religious preference information when creating prospects from test score loads.
Admit Term Map	SAD_TERM_MAP	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Create Prospects Setup > Admit Term Map	Map the graduation dates provided by a test layout to the corresponding PeopleSoft admit terms. Set up this page only if the test layout provides a graduation date and you want the system to use that date to determine the admit term when creating a prospect from a test score load. The following test layouts provide a graduation date: ACT, CRS, EOS, GMAT, and SAT.
Program Plan SubPlan Map	SAD_INTPROG_MAP	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Create Prospects Setup > Program Plan SubPlan Map	Map each interest code provided by the testing agency to a program, plan or subplan. Set up this page only if the test layout provides an interest code and you want the system to use the code to determine the program, plan or subplan when creating a prospect from the test load. The following test layouts provide a major interest: ACT, EOS, GMASS, SAT, GRE, and SSS.




















Mapping Academic Interest Codes

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

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

Academic Interests Map

Test ID ACT ACT Assessment

Customize Find View All  First 1-6 of 6 Last					
	Academic Interest	Description	Interest Code		
1	BIOL 	Biology	834		
2	CHEM 	Chemistry	836		
3	COMP 	Computer Science	561		
4	COMP 	Computer Science	562		
5	ECON 	Economics	410		
6	FREN 	French	723		

Field or Control	Description
Academic Interest	Enter the internal academic interest code that corresponds to the testing agency code. Academic interest codes are defined on the External Subject Table page.
Interest Code	Enter the interest code provided by the testing agency. You must contact the testing agency for these codes or refer to the test score layout provided by the testing agency.

Mapping Extracurricular Activity Codes

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

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

Extracurricular Activity Map

SetID PSUNV Peoplesoft University
Test ID SAT I Scholastic Assessment Test I

Customize Find First 1-29 of 29 Last							
	Extracurricular Activity		Activity Code	College Activity	High School/Community Activity		
1	AZZ	Other Sport	B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
2	AZZ	Other Sport	C	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
3	AZZ	Other Sport	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
4	C01	Music - Vocal	Q	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
5	C02	Music - Instrumental	P	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
6	CZZ	Other Performing Arts	F	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
7	DZZ	Other Publication	N	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
8	DZZ	Other Publication	O	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
9	E01	Speech/Debate	G	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
10	E01	Speech/Debate	I	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
11	E02	Drama Club	I	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
12	E11	Art Club	A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
13	EA2	Fraternity	C	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
14	EZZ	Other Club or Organization	D	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
15	EZZ	Other Club or Organization	H	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
16	EZZ	Other Club or Organization	K	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
17	EZZ	Other Club or Organization	L	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-

Field or Control	Description
Extracurricular Activity	Enter the internal extracurricular activity code that corresponds to the testing agency code. Extracurricular activity codes are defined on Extracurricular Activity Table page.
Activity Code	Enter the activity code provided by the testing agency. You must contact the testing agency for these codes or refer to the test score layout provided by the testing agency.
College Activity	The SAT and ACT testing agencies record two types of activity information: high school/community activities that the student has participated in and the activities that the student wants to participate in when in college. Select this check box if you want to populate extracurricular activities with the activity that the student wants to participate in when in college.

Field or Control	Description
High School/Community Activity	Select this check box if you want to populate extracurricular activities with the activity from the student's high school/community activity data.

Mapping Religious Preference Codes

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

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

Religious Preference Map

Test ID ACT ACT Assessment

Customize | Find | View All | | First 1-4 of 4 Last

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

Field or Control	Description
Religious Preference	Enter the religious preference code that corresponds to the testing agency code. Religious preference codes are defined on the Religious Preference Table page.
Religion Code	Enter the religion code provided by the testing agency. You must contact the testing agency for these codes or refer to the test score layout provided by the testing agency.

Mapping Admit Terms

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

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

Admit Term Map

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

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

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

Field or Control	Description
Graduation Date From and Graduation Date To	Enter graduation date ranges for the test layouts that provide a graduation date.
Term	Enter the admit term that corresponds to the graduation date range.

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

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

Mapping Programs, Plans and Subplans

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

This example illustrates the fields and controls on the Program Plan SubPlan Map page. You can find definitions for the fields and controls later on this page.

Program Plan SubPlan Map

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

Customize Find View All First 1-6 of 6 Last					
*Interest Code	*Academic Program	Academic Plan	Academic Sub-Plan		
410	FAU			+	-
450	FAU	MUSIC		+	-
561	FAU	MUSIC	PIANO	+	-
723	FAU			+	-
834	FAU	ART		+	-
836	LAU	BIOLBS		+	-

Field or Control	Description
Interest Code	Enter the interest code provided by the testing agency. You must contact the testing agency for these codes or refer to the test score layout provided by the testing agency.
Academic Program, Academic Plan, Academic Sub-Plan	Enter the academic program, plan or subplan that corresponds to the interest code

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

(CAN) Setting Up to Receive OUAC Transactions

Setting Up EDI Manager for OUAC Transactions

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

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

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

This table lists the OUAC elements that are school specific:

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
010 - Institution	OUAC_LAW_A	OUAC_CTL_WD	INSTITUTION
	OUAC_LAW_U	OUAC_CTL_WD	INSTITUTION
	OUAC_PT	OUAC_CTL_WD	INSTITUTION
	OUAC_TEA_A	OUAC_CTL_WD	INSTITUTION
	OUAC_TEA_U	OUAC_CTL_WD	INSTITUTION
	OUAC_UAS_A	OUAC_CTL_WD	INSTITUTION
	OUAC_UAS_U	OUAC_CTL_WD	INSTITUTION

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
395 - University/Program Desired	OUAC_UAS_A	OUAC_A5_U5_WD	ACAD_PROG
	OUAC_UAS_U	OUAC_A5_U5_WD	ACAD_PROG
	OUAC_UAS_U	OUAC_D1_WD	ACAD_PROG
	OUAC_PT	OUAC_A5_U5_WD	ACAD_PROG
400 - Expected Enrollment Date	OUAC_UAS_A	OUAC_A5_U5_WD	ADMIT_TERM
	OUAC_UAS_U	OUAC_A5_U5_WD	ADMIT_TERM
	OUAC_UAS_U	OUAC_D1_WD	ADMIT_TERM
	OUAC_PT	OUAC_A5_U5_WD	ADMIT_TERM
410 - Full or Part-time	OUAC_UAS_A	OUAC_A5_U5_WD	ACAD_LOAD_APPR
	OUAC_UAS_U	OUAC_A5_U5_WD	ACAD_LOAD_APPR
	OUAC_PT	OUAC_A5_U5_WD	ACAD_LOAD_APPR
411 - Year Desired	OUAC_UAS_A	OUAC_A5_U5_WD	ACADEMIC_LEVEL
	OUAC_UAS_U	OUAC_A5_U5_WD	ACADEMIC_LEVEL
	OUAC_PT	OUAC_A5_U5_WD	ACADEMIC_LEVEL
440 - Residence Information Requested	OUAC_UAS_A	OUAC_A5_U5_WD	HOUSING_INTEREST
	OUAC_UAS_U	OUAC_A5_U5_WD	HOUSING_INTEREST
	OUAC_PT	OUAC_A5_U5_WD	HOUSING_INTEREST
600 - Final or Interim	OUAC_UAS_A	OUAC_M2_WD	TRNSCRPT_STATUS
	OUAC_UAS_U	OUAC_M2_WD	TRNSCRPT_STATUS
755 - Last Session of Study at CEGEP	OUAC_UAS_A	OUAC_C1_WD	EXT_TERM
	OUAC_UAS_U	OUAC_C1_WD	EXT_TERM
765 - Session CEGEP Course Taken	OUAC_UAS_A	OUAC_C2_WD	EXT_TERM
	OUAC_UAS_U	OUAC_C2_WD	EXT_TERM

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
531 - Year Level	OUAC_PT	OUAC_PI_WD	EXT_ACAD_LEVEL
	OUAC_TEA_A	OUAC_PI_WD	EXT_ACAD_LEVEL
	OUAC_TEA_U	OUAC_PI_WD	EXT_ACAD_LEVEL
	OUAC_UAS_A	OUAC_PI_WD	EXT_ACAD_LEVEL
	OUAC_UAS_U	OUAC_PI_WD	EXT_ACAD_LEVEL
533 - Diploma Received	OUAC_LAW_A	OUAC_G2_H2_WD	OUAC_DIPLOMA_CODE
	OUAC_LAW_U	OUAC_G2_H2_WD	OUAC_DIPLOMA_CODE
	OUAC_PT	OUAC_PI_WD	OUAC_DIPLOMA_CODE
	OUAC_TEA_A	OUAC_PI_WD	OUAC_DIPLOMA_CODE
	OUAC_TEA_U	OUAC_PI_WD	OUAC_DIPLOMA_CODE
	OUAC_UAS_A	OUAC_PI_WD	OUAC_DIPLOMA_CODE
	OUAC_UAS_U	OUAC_PI_WD	OUAC_DIPLOMA_CODE
665 - University/Program Desired	OUAC_UAS_A	OUAC_AR_WD	ACAD_PROG
	OUAC_UAS_U	OUAC_AR_WD	ACAD_PROG
670 - Enrollment 1 Offered	OUAC_UAS_A	OUAC_AR_WD	ADMIT_TERM
	OUAC_UAS_U	OUAC_AR_WD	ADMIT_TERM
840 - University/Program Code	OUAC_TEA_A	OUAC_A8_U8_WD	ACAD_PROG
	OUAC_TEA_U	OUAC_A8_U8_WD	ACAD_PROG
	OUAC_TEA_U	OUAC_D1_WD	ACAD_PROG
860 - Residence Information Requested	OUAC_TEA_A	OUAC_A8_U8_WD	HOUSING_INTEREST
	OUAC_TEA_U	OUAC_A8_U8_WD	HOUSING_INTEREST
685 - Year Level Offered	OUAC_UAS_A	OUAC_AR_WD	ACADEMIC_LEVEL
	OUAC_UAS_U	OUAC_AR_WD	ACADEMIC_LEVEL
1400 - Course Level	OUAC_UAS_A	OUAC_F2_WD	COURSE_LEVEL
	OUAC_UAS_U	OUAC_F2_WD	COURSE_LEVEL
	OUAC_UAS_A	OUAC_F3_WD	COURSE_LEVEL
	OUAC_UAS_U	OUAC_F3_WD	COURSE_LEVEL

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
825 - Degree Code	OUAC_TEA_A	OUAC_A8_U8_WD	OUAC_DIPLOMA_CODE
	OUAC_TEA_U	OUAC_A8_U8_WD	OUAC_DIPLOMA_CODE

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

OUAC ELEMENT	Transactions	TP Convert Name
170 - Country of Current Citizenship	A4	OUAC_CNTRY
180 - Citizenship, Appendix 9.A.30	A4	OUAC_CNTRY
190 - Country of Residence, Appendix 9.A.30	A4	OUAC_CNTRY
200 - Province of Residence	A4	OUAC_PROV
220 - Immigration Status	A4	CitznStat
230 - Gender	A4	Sex
250 - Marital Status	A4	MAR_STATUS
270 - First Language	A4	Accmpl-Lng
542 - Country where attended English School	A5	OUAC_CNTRY
573 - Response to OSAP Question	A5	OUAC_Y/N
2174 - LSAT Misconduct Flag	J1	OUAC_Y/N
1080 - Country of Birth	A5	OUAC_CNTRY
280 - Language of Correspondence	A4	Accmpl-Lng
450 - Language of Instruction	A5	Language
581 - Language of Instruction	M2	Language
865 - Language of Instruction	A8	Language

OUAC ELEMENT	Transactions	TP Convert Name
430 - Previous Yr Applied to this Inst	A5	Prior_Appl
114 - Mailing Address Country	B7	OUAC_FCTRY
154 - Home Address Country	B8	OUAC_FCTRY
560 - Achievement of OSSD	M1	Degr_Stat
2168 - Plan to Write LSAT Future	J1	OUAC_Y/N
2106 - Emergency Contact Country	B9	OUAC_FCTRY

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

OUAC ELEMENT	Transactions	Field Name
2201 - LSAT Details irreg code	J2, J3, J4	OUAC_LSAT_IRREG1 OUAC_LSAT_IRREG2 OUAC_LSAT_IRREG3 OUAC_LSAT_IRREG4
477 - Attended Postsecondary	A5	OUAC_ATTND_PSTSCND
475 - Authorization to Release Academic	A5	OUAC_AUTH_RELEASE
397 - Cooperative Education	A5, D1	COOP_REQ
507 - Authorization to Release Univ Performance to Sec School	A9	OUAC_AUTH_RELEASE
930 - Previously Dealt w/ University	B1	OUAC_PRV_WITH_UNIV
2020 - Ever Attended Law School	B1	OUAC_ATTEND_LAW
2145 - Fee Waiver Received	G8	OUAC_WAIVER_RCVD (check box)

OUAC ELEMENT	Transactions	Field Name
2151 - All OLSAS Applications	G8	OLSAS_OSGOODE_STAT OLSAS_OTTAWA_STAT OLSAS_QUEENS_STAT OLSAS_TORONTO_STAT OLSAS_WESTERN_STAT OLSAS_WINDSOR_STAT
2095 - Authorization	G3	OUAC_EMR_CNTCT_AUT
295 - Mature Student Regulation	A4	OUAC_MATURE_STDNT
935 - Second Degree	B1	OUAC_SECOND_DEGREE
2173 - Ethnic Code	J1	ETHNICITY_LSAC
2286 - Type	R2	OUAC_DEGREE_TYPE

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

OUAC ELEMENT	Table Name
532 - Program of Study, Appendix 9.A.65	EXT_SUBJECT_TBL
332 - Subject of Major Interest, Appendix 9.A.80	EXT_SUBJECT_TBL
845 - Teaching Subject 1, Appendix 9.A.85 850 - Teaching Subject 2, Appendix 9.A.85	OUAC_T_SUBJECT_TBL
750 - Program Code Last Studied, Appendix 9.A.25	CEGEP_PROG_TBL
525 - Advanced Standing Program, Appendix 9.A.95	OUAC_PROG_TBL
2111 - Category, Appendix 9.A.50	OUAC_LAW_CAT_TB

See Also

Product documentation for *PeopleTools: Supported Integration Technologies*

Setting Up OUAC Law Categories

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

Page Used to Set Up OUAC Law Categories

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

Setting Up Teaching Subjects and CEGEP Programs

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

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

Pages Used to Set Up Teaching Subjects

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

Setting Up OUAC Organizations

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

This section discusses how to:

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

Pages Used to Set Up OUAC Organizations

Page Name	Definition Name	Navigation	Usage
Organization Table	EXT_ORG_TABLE	Campus Community > Organization > Create/Maintain Organizations > Organization Table > Organization Table	Enter or update data about an organization. View and update information about the primary contact and department for the organization.
Regional	EXT_ORG_TBL_REG	Campus Community > Organization > Create/Maintain Organizations > Organization Table > Regional	In the OUAC Organization Data group box, enter the Ministry of Education code, the OUAC institution code, and the current enrollment levels for the new organization.
School Data	SCC_EXT_ORG_ADM	Campus Community > Organization > Create/Maintain Organizations > Organization School Data	Enter data that applies to an organization that offers courses.
Organization Affiliation	EXT_ORG_AFFLTN	Campus Community > Organization > Create/Maintain Organizations > Organization Affiliation	Identify details that are important to your institution in affiliation with an organization.
School Course Classification	SCHOOL_COURSES	Campus Community > Organization > Create/Maintain Organizations > School Course Classification	Record the specific course offerings for each subject area.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Comment Category Table	CMNT_CATG_TABLE	<ul style="list-style-type: none"> • Campus Community > Comments > Set Up Comments > Comment Category Table • Set Up SACR > Common Definitions > Comments > Comment Category Table 	Set up comment categories that enable you to group comments for similar purposes.

Adding OUAC Organizations

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

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

Related Links

"Understanding Organizations" (Campus Community Fundamentals)

Specifying a Primary Contact and Department for an OUAC Organization

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

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

Related Links

"Creating Organization Records" (Campus Community Fundamentals)

Entering OUAC Organization Data

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

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

Organization Table
Regional

External Org ID: 000000001

Organization Details
Find | View All
First 1 of 1 Last

Effective Date: 10/17/1997 **Status:** Active

Description: Cottonwood High School

North American Industry Classification System
Customize | Find | View All
First 1 of 1 Last

*NAICS	Description
<input type="text"/>	<input type="text"/>

Add

OUAC Organization Data

Mident Code: **OUAC Institution Code:**

Current Enrollment Levels

Grade 9 Enrollment:	<input type="text"/>
Grade 10 Enrollment:	<input type="text"/>
Grade 11 Enrollment:	<input type="text"/>
Grade 12 Enrollment:	<input type="text"/>
OAC Enrollment:	<input type="text"/>

Last Update Date/Time: **by:**

Field or Control	Description
Mident Code	Enter the Ontario Ministry of Education six-digit school code.
OUAC Institution Code	Enter the code that identifies OUAC institutions. When you post OUAC data, the process looks for this code to populate the EXT_ORG_ID field.
Grade 9 (through 12) Enrollment	Enter the current enrollment levels for the respective grades.
OAC Enrollment	Enter the total OUAC enrollment.

Entering School Data

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

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

Related Links

"Entering School-Related Data" (Campus Community Fundamentals)

Assigning GPA Types to OUAC Organizations

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

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

Related Links

"Entering Affiliations with Organizations" (Campus Community Fundamentals)

Defining School Course Classifications for OUAC

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

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

Related Links

"Setting Up External Subject Categories and Term Sessions" (Campus Community Fundamentals)

Defining the SECSCH Comment Category

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

Related Links

"Setting Up Comment 3C Groups" (Campus Community Fundamentals)

Setting Up for Evaluating Applicants

Prerequisites for Applicant Evaluations

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

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

Setting up Applicant Evaluation

This section discusses how to:

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

Pages Used to Set up Applicant Evaluation

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

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

Defining Rating Schemes

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

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

Rating Scheme Table

Rating Components Table

Academic Institution:

PSUNV

PeopleSoft University

Rating Scheme:

UGAPPLFYR

Find | View All

First

1 of 1

Last

*Effective Date:

01/01/1900

*Status:

Active

Extracts

*Rating Type:

Overall

*Description:

UG Applications

Short Description:

UG Appl

Instructions:





All first-year applications to the undergraduate career are evaluated objectively on curriculum, academic performance, and testing. In addition, they are evaluated subjectively by members of the admissions committee.

Field or Control	Description
Rating Type	<p>Select a rating type for this scheme. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Application</i>, <i>Audition</i>, <i>Committee</i>, <i>Interview</i>, <i>Overall</i>, and <i>Portfolio</i>.</p> <p>Note: If you plan to evaluate applicants using automated processes, you must define a rating scheme with an <i>Overall</i> rating type.</p>
Instructions	Enter information about this rating scheme.
Extracts	Click this button to enter the SQCs for your material extracts. The Material Extract Detail Page for this rating scheme appears.

Using the Material Extract Detail Page

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

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

Materials Extract Detail		
	SQC Name	Material Group
Test Score:	<input type="text" value="ADEXTTST"/>	<input type="text" value="UGTESTS"/> 
Summary:	<input type="text" value="ADEXTSUM"/>	<input type="text" value="UGSUMMR"/> 
Course:	<input type="text" value="ADEXTCRS"/>	<input type="text" value="UGCRSES"/> 
Subject:	<input type="text" value="ADEXTSBJ"/>	<input type="text" value="UGSUBJECT"/> 
Genl Matl:	<input type="text"/>	

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

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

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

See [Pages Used to View Summary Application Materials Information](#).

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

Assigning Components to Rating Schemes

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

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

Rating Scheme Table

Rating Components Table

Academic Institution: PSUNV PeopleSoft University
Rating Scheme: UGAPPLFYR UG Applications

Find | View All First 1 of 1 Last

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

Find | View All First 1 of 7 Last

***Rating Component:** 1OVER ***Type:** Cumulative

Processing Order: 7 ☒ **Final Value**

Description: Overall Rating ☒ **Required**

Short Description: Overall

Calculation Info

***Method** Automatic

Formula ID ADOVERAL

Find | View All First 1 of 1 Last

*Rating Value	*Description	Short Description

Field or Control	Description
Rating Component	Enter a rating component for this rating scheme. Rating components are specific criteria that you use to rate applicants. When you are ready to evaluate applicants, you can assign scores to each rating component (if you are evaluating the applicant manually), which can be averaged for an overall score for the rating scheme. Assign rating components on the Rating Component Definition Table page.
Type	Identify the type of rating component that you selected. This identifies the rating component as an individual component (such as Essay), or one that is made up of other components (such as Overall). Component types are useful for informational and reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Cumulative</i> and <i>Individual</i> .
Processing Order	Enter the order in which this component should be processed within the group of components assigned to this rating scheme.

Field or Control	Description
Final Value	Select this check box if this component is one on which you base admissions decisions. The application status update process that posts results of an evaluation to the application looks to see if all components with this check box selected have been fulfilled before posting a result. You can have only one component selected as final value (such as overall rating), if that component is the only component that needs to be fulfilled before evaluating the applicant. You can also have more than one component selected as final value (such as overall, highest GPA, and highest test score), if you require all of these components to be fulfilled before evaluating the applicant.
Required	Select this check box if this component <i>must</i> be considered for this rating scheme. For example, you might have a rating scheme that requires the testing component, which looks for a person's highest ACT or highest SAT score. Within this rating scheme you also have separate components for SAT and ACT, but they are <i>not</i> marked required. If a component is not marked as required, your rating scheme process continues to the next component if this component does not exist for this applicant. If a component is marked required, the process will not continue if the component is missing. So in our example, there would have to be an ACT <i>or</i> SAT score, but not both, since only the testing component is required.
Method	<p>Select the calculation method for this component. Component rating values can be calculated automatically, in which case the Assign Adm Applicant Rating (assign admissions applicant rating) process calculates the rating value for you. Alternatively, you can calculate the value manually, which means that you enter the score. For example, you would most likely want to calculate an objective rating component (such as overall rating) automatically. Thus, the process would look at various data to come up with the overall rating score for an applicant. Alternatively, you would probably want to enter subjective scores (such as for the recommendations rating component) manually.</p> <p>Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Automatic</i> and <i>Manual</i>.</p>
Formula ID	If you selected <i>Automatic</i> in the Method field, select a formula ID. Formula IDs are the names of the SQCs that provide the programming logic for components. These are the programs that retrieve the data for the evaluation calculation. PeopleSoft delivers sample SQCs but you will need to create your own to meet your business process needs.

Field or Control	Description
Rating Value	<p>Enter a numeric rating value if the component is calculated manually. For example, if you want the essay component to be used as part of a committee evaluation, you can assign rating values (such as poor or average) to the essay component, as on the previous page example. When evaluators enter evaluations for these components (on the General Evaluator Detail page or the Application Evaluator Detail page), they can prompt for these rating values.</p> <hr/> <p>Note: The rating values you enter here are not retrieved through the Application Evaluation process, as are objective values such as test scores and GPA. Individual evaluators will use the rating values you enter here when they rate subjective materials (such as essays).</p>

Defining Evaluation Codes

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

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

Evaluation Table		Evaluation Committee Table	
Academic Institution:	PSUNV	PeopleSoft University	
Evaluation Code:	UGAPPLFYR		
*Description:	<input type="text" value="UG Applicants"/>		
Short Description:	<input type="text" value="UG Appl"/>		
*Evaluation Type:	Application		
Committee Rating ID:	<input type="text" value="UGCOMMFYR"/>	UG Application Committee	
Overall Rating ID:	<input type="text" value="UGAPPLFYR"/>	UG Applications	
Comments:	<div><div></div><div></div></div>		

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

Field or Control	Description
Committee Rating ID	If committees perform this evaluation, enter the rating scheme that the committee will use with this evaluation code. You assign actual committees to this evaluation code on the next page in this component. Define rating schemes on the Rating Scheme Table page.
Overall Rating ID	Assign an overall rating scheme if you use this rating code for overall evaluations.

Defining Evaluation Committees for Admission Applications

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

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

The screenshot shows the 'Evaluation Committee Table' page. At the top, there are tabs for 'Evaluation Table' and 'Evaluation Committee Table', with the latter being active. Below the tabs, the 'Academic Institution' is set to 'PSUNV' (PeopleSoft University) and the 'Evaluation Code' is 'UGAPPLFYR' (UG Applicants). There are search and navigation controls (Find, View All, First, 1 of 1, Last). The main section is divided into two parts: '*Committee' and '*Evaluator ID'. The '*Committee' section shows a search for 'UGEV01' resulting in 'UG Admissions Committee'. The '*Evaluator ID' section shows a list of evaluators: AD1040 (Sullivan, Irving) and AD1041 (Dern, Bill), both with a role of 'STAF' (Adm Staff).

Field or Control	Description
Committee	Enter a committee to be assigned to this evaluation code. You can add more than one committee for an evaluation code. Define committees and committee members on the Committee page in PeopleSoft Campus Community.
Evaluator ID	Enter the evaluators who sit on this committee. All members of this committee automatically appear as evaluators, along with their role on the committee. You can add evaluators who are not already assigned to this committee.
Role	Enter evaluator roles for the evaluators that you add. Roles for committee members appear from the Committee Members page.

Related Links

"Prerequisites for Managing Committee Data" (Campus Community Fundamentals)

"Creating Committees" (Campus Community Fundamentals)

"Assigning Committee Members" (Campus Community Fundamentals)

Defining Evaluation Status Codes

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

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

Setting Up Student Response

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

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

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

Related Links

[Updating Applications](#)

Page Used to Set Up Student Response

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

Enabling Student Response for a School Type

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

Related Links

[Setting Up School Types](#)

Setting Up Admissions Program Actions and Program Action Reasons

Setting Up Admissions Program Actions and Program Action Reasons

This section discusses how to:

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

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

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

Page Name	Definition Name	Navigation	Usage
Program Action Table	PROG_ACTION_TABLE	Set Up SACR > Product Related > Student Records > Program Action > Program Action Table	<p>Modify program action descriptions. Program action codes designate the status of a student in a program from the time he or she is an applicant and throughout his or her academic career.</p> <p>For example, a student must have a program action of <i>Matriculate</i> to become a student, and a program action of <i>Activate</i> in any term in which she wants to enroll.</p> <p>You can change the effective date and status for the program action codes that PeopleSoft provides. By changing the effective date and status you can render a program action code inactive so that it is longer available to your users.</p> <hr/> <p>Note: Program actions are predefined and cannot be changed on this page.</p> <hr/>
Program Action Reason Table	PROG_RSN_TBL	<ul style="list-style-type: none"> • Set Up SACR > Product Related > Recruiting and Admissions > Applicants > Program Action Reason Table • Set Up SACR > Product Related > Student Records > Program Action > Program Action Reason Table 	<p>Define program action reasons. You can define multiple reasons for one action. For example, for the action <i>Administrative Withdrawal</i>, you can define a reason of <i>Incomplete Application</i> as well as a reason of <i>No Response</i>. These reasons enable flexibility with the program action codes delivered with your system.</p>

Reviewing Admissions Program Action Values

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

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

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

Defining Admissions Program Action Reason Values

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

This example illustrates the fields and controls on the Program Action Reason Table page.

Program Action Reason Table			
SetID:	PSUNV		
Program Action:	WADM	Administrative Withdrawal	
Action Reason:	DEAT		
<div>Find View All First 1 of 1 Last</div>			
*Effective Date:	01/01/1900	*Status:	Active
*Description:	Deceased		
Short Description:	Deceased		

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

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

Recruiting Prospective Students

Understanding Adding Prospects

You can add prospects to your system:

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

See [Setting Up Admission Installation Defaults](#).

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

Prerequisites for Adding Prospects

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

See [Setting Up Your Recruiting Structure](#)

See [Defining Recruiters](#)

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

See "Understanding Search/Match" (Campus Community Fundamentals)

See "Setting Up Search/Match" (Campus Community Fundamentals)

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

Adding Prospects Through the Create/Update Prospects Component

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

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

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

The 3C buttons are common to multiple pages within this component: **Add a New Communication**, **Add a New Checklist**, and **Add a New Comment**.

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

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

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

Pages Used to Add Prospects

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Prospect Career Data	ADM_PRSPCT_CAR	Student Recruiting > Maintain Prospects > Create/Update Prospects > Prospect Career Data	Enter prospect career data. Store additional prospect information that you define by using the Common Attribute Framework.

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

Entering and Updating Prospect Biographical Details

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

See "Understanding Biographical Information" (Campus Community Fundamentals).

Entering and Updating Prospect Regional Data

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

See "Setting Up and Reviewing Regulatory Regions" (Campus Community Fundamentals).

Entering or Updating Personal Information for Prospects

Access the Personal page (**Student Recruiting** > **Maintain Prospects** > **Create/Update Prospects** > **Personal**).

Use the Personal page to enter or update other biographic details such as gender or sexual orientation. This information is stored separately from the rest of the applicant's data. This page appears when you select at least one field from the Biographic Details page.

For more information about:

- Setting up the Personal page, see "Reviewing or Defining Installation Settings For Biographic Fields" (Campus Community Fundamentals).

- The Personal page, see "Entering Personal Information" (Campus Community Fundamentals).

Entering and Updating Prospect Academic Career Data

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

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

The screenshot shows the 'Prospect Career Data' page for a prospect named Billy Black. The page has several tabs: Biographical Details, Addresses, Regional, Prospect Career Data (selected), and Prospect Program Data. The prospect's ID is 1361 and their institution is PSUNV. The academic career is set to Undergraduate.

Admission Fields:

- Admit Term: 0730 (dropdown), 2014 Fall, ☐ Applied
- Admit Type: FYR (dropdown), First-Year
- Campus: (dropdown)
- Academic Load: (dropdown)
- Academic Level: (dropdown)
- Housing: (dropdown)
- ☐ Financial Aid Interest

Recruiting Information:

- *Recruiting Status: Prospect (dropdown)
- Referral Source: FAIR (dropdown), Coll Fair
- Status Date: 05/15/2013 (calendar)
- Source Date: 05/15/2013 (calendar)
- Created On: 05/15/2013 (calendar)
- *Recruiting Center: ULAU (dropdown), ULAU

Additional Prospect Data:

Personalize | Find | View All | 1-5 of 7 | First | Last

	Effective Date	*Field	Text - 20	LOV	Description		
1	05/30/2013	CFA_TEXTOK	No			+	-
2	05/30/2013	CFA_PARENTSGRAD	Y			+	-
3	05/30/2013	CFA_CLASSRANK	Top10			+	-
4	05/30/2013	CFA_PARENTSCOLLEGE				+	-
5	05/30/2013	CFA_SCHLSETTINGPREF	None			+	-

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

Field or Control	Description
Admit Term	Enter the admit term for the prospect's career. Define admit terms on the Term Table page. (user defaults)

Field or Control	Description
Admit Type	Enter the prospect's admit type for this career. Define admit types on the Admit Type Table page. (user defaults)
Campus	Enter a campus to associate the prospect to a specific campus. Define campuses on the Campus Table page. (user defaults)
Academic Load	Select the appropriate academic load for this career. Values for this field are delivered with your system as translate values. You can modify these translate values.
Academic Level	Select the academic level for this career. Values for this field are delivered with your system as translate values. You can modify these translate values. (user defaults)
Housing	Select any housing interest that this person indicated. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Commuter</i> , <i>Off Campus</i> , and <i>On Campus</i> . This field is for informational purposes. (user defaults)
Financial Aid Interest	Select to indicate that this prospect has an interest in financial assistance. This field is for informational purposes only. (user defaults)
Applied	The system automatically updates this check box when the prospect applies to your institution if, on the Installation Defaults - AD page, you set up the system to update prospect records when prospects become applicants.
Recruiting Status	Select the person's recruiting status. The recruiting status indicates the level of interest, at the academic career level, that your institution has in the prospective student. For example, you might consider a person who attended an on-campus event a suspect (someone who you <i>suspect</i> is interested in your institution). Conversely, you might consider a person who sends a prospect card a prospect (someone who you know is interested in your institution). This field is also helpful for targeting mass mailings. Values for this field are delivered with your system as translate values. These translate values can be modified. Values are <i>Applicant</i> , <i>Inactive</i> , <i>Inquiry</i> , <i>Prospect</i> , and <i>Suspect</i> .
Status Date	Enter the date, if different than the default date, on which you entered or updated the recruiting status. The default date is the system date on the day the record was added.
Created On	Enter the date, if different than the default date, on which this prospect record was created. The default date is the system date on the day the record was added.

Field or Control	Description
Referral Source	Enter the appropriate referral source for this prospect. A referral source indicates how this person became a prospect. The referral source is a high level indicator of how your institution came into contact with the person. For example, a referral source could be <i>Drop-In</i> , <i>Campus Event</i> , or <i>College Fair</i> . Although this is a way to track your first contact with this person, record subsequent contacts with the Communications pages. Define referral sources on the Referral Source Table page.
Source Date	Enter the date, if different than the default date, on which you entered this referral source. The default date is the system date on the day the record was added.
Recruiting Center	Enter the recruiting center that is responsible for this prospect's career. Define recruiting centers on the Recruiting Center Table page. The values depend on the academic career that you select and are subject to user security established for recruiting centers. (user defaults)
Go	Click this button to go to another component for this prospect record.

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

Additional Prospect Data

This section enables you to store additional prospect data that does not have a home in the core prospect records. Populate this section with values for common attributes defined within the Common Attribute Framework. Attributes can be manually added on this page or can also be populated from the Prospect/Admissions Data Load process. The prompts in the Field column will display attributes associated on the record context for ADM_PRSPCT_CAR.

See "Understanding Common Attribute Framework" (Campus Community Fundamentals)

See [Understanding Prospect/Admission Data Load Transactions](#)

Entering and Updating Prospect Academic Program Data

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

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

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

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

<i>Field or Control</i>	<i>Description</i>
Recruiting Status	<p>Select the recruiting status for this program. Depending on your settings on the Installation Defaults - AD page, the system can update the recruiting status when the person applies to your institution. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Applicant</i>, <i>Inactive</i>, <i>Inquiry</i>, <i>Prospect</i>, and <i>Suspect</i>.</p> <p>By tracking recruiting information at the academic program level, you can designate a recruiting status that is different than the status that is designated at the academic career level.</p>
Status Date	The status date is the system date on the day that you last modified the Recruiting Status field.
Application Number	If the prospect applies to this academic program, the system automatically updates the application number.

Field or Control	Description
Recruiting Center	Enter the recruiting center that is responsible for this particular program for the prospect. Define recruiting centers on the Recruiting Center Table page. (user defaults)
Academic Plan and Sub-Plan	Enter an academic plan and subplan, if known. You can enter multiple academic plans for a program and multiple subplans under an academic plan. Define academic plans in the Academic Plan Table component and academic programs in the Academic Program Table component (user defaults).

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

Entering and Updating Prospect School and Recruiting Data

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

This example illustrates the fields and controls on the Prospect School/Recruiting page. You can find definitions for the fields and controls later on this page.

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

Ronald Greene
AA0037

Academic Career: Undergraduate
Institution: PSUNV
Events

School Information

Last School Attended: 000000001 Cottonwood High School

Graduation Date: 05/15/2001

School Type: Secondary
Proprietorship: Public

City: Salt Lake City
State: UT
Country: USA

Recruiting Information

Region:

From:

Primary Recruiter ID:

Assign Region From

Home Postal Code

School Postal Code

Recruiting Categories
Find | View All
First 1 of 1 Last

***Category:**

Sub-Category:

Description:

Group:

☐ Move to Application

Recruiters
Find | View All
First 1 of 1 Last

Recruiters Prompt
***Recruiter ID**
Recruiter Type
Primary

☒ Recruiters

Transfer To: Education Go

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

School Information

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

Recruiting Information

Field or Control	Description
Region	You can assign a recruiting region manually or automatically. To manually assign a region, click the prompt on the Region field and enter as value. Define regions on the Region Table page.
Home Postal Code	Click this button to automatically assign the recruiting region, based on the home postal code of the prospect. Assigning recruiting regions based on home address postal codes requires that you define the region tree.
School Postal Code	Click this button to automatically assign the recruiting region, based on the postal code of the primary location of the prospect's last school attended. Assigning recruiting regions based on school postal codes requires that you define the region tree. See Setting Up Your Recruiting Structure .

Field or Control	Description
From	<p>This display-only field shows you how this region was defined:</p> <p><i>Region Tree</i> appears if you <i>manually</i> assigned a region.</p> <p><i>Address</i> appears if you assigned the region when you click the Home Postal Code button.</p> <p><i>School</i> appears if you assigned the region when you click the School Postal Code button.</p> <p>See Defining Recruiters.</p>

Recruiting Categories

Field or Control	Description
Category	<p>Enter a recruiting category for the prospect within this career. In our example, the prospect's sibling attended the institution. Define recruiting categories on the Recruiting Category Table page. Use categories to target and report on students.</p> <p>You can enter multiple recruiting categories and prospect supporting information for each career.</p> <hr/> <p>Note: If you plan to assign a regional recruiter to this prospect, you must enter a category of <i>REGN</i> (region).</p> <hr/>
Sub-Category	<p>Select a recruiting subcategory, if known. Subcategories can indicate the priority of this recruiting category. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i>, <i>High</i>, <i>Low</i>, and <i>Medium</i>.</p>
Group	<p>The system automatically populates this field from the Recruiting Category Table page after you enter a recruiting category in the Category field.</p>
Move to Application	<p>Select this check box to copy the information in the Recruiting Categories group box to the application record when the prospect applies to your institution. The system selects this check box if you set up the system to copy prospect data to the application by selecting the Copy Data and Recruiting Categories check boxes on the Installation Defaults - AD page.</p>

Recruiters

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

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

<i>Field or Control</i>	<i>Description</i>
Recruiters Prompt	<p>Select this check box if you want <i>all</i> recruiters to be available when you prompt on the Recruiter ID field, regardless of the recruiting category to which recruiters are assigned.</p> <p>Clear this check box to view only those recruiters who are assigned to the current recruiting category to be available when you click the prompt on the Recruiter ID field. The <i>REGN</i> (region) category works differently.</p> <p>If you are adding recruiters for the recruiting category <i>REGN</i>, you select only from recruiters in the region that you selected on the Prospect School/Recruiting page. You can enter a region on the Prospect School/Recruiting page manually or automatically. The list of regional recruiters vary, depending on how you defined the region.</p> <p>If you defined the region according to the last school that the prospect attended, the Recruiters Prompt field displays the recruiters for the school's region. If you click the prompt on the Recruiter ID field, the system displays a list of recruiters that are assigned to that school. If no recruiters are assigned to that school, then you must select a recruiter who is assigned to the region.</p> <p>If you entered the region according to the prospect's home address, the Recruiters Prompt field displays the recruiters for the address region. If you click the prompt on the Recruiter ID field, the system displays a list of recruiters who are assigned to the region.</p> <p>If you manually assigned the region from the region tree, the system displays a list all recruiters who are assigned to a recruiting category of <i>REGN</i> when you click the prompt on the Recruiter ID field. Click the prompt on the Recruiters field to view the recruiters for the category.</p> <p>To override the system defaults, select the Recruiters Prompt check box. All recruiters for the academic career are available when you click the prompt on the Recruiter ID field.</p>

Field or Control	Description
Recruiter ID	Enter the ID of the person to assign to this prospect. You can assign multiple recruiters for any recruiting category to a prospect.
Recruiter Type	The recruiter type appears automatically, based on the recruiter ID.
Primary	Select this check box if this is the primary recruiter for this academic career. This ID appears on the Prospect School/ Recruiting page in the Primary Recruiter ID field. You can also enter both primary and non-primary recruiters using this option.
Go	Click this button to go to another component for this prospect record.

Tracking Prospects Event Attendance

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

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

Related Links

"Creating an Event" (Campus Community Fundamentals)

Recording Event Meeting Information

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

Field or Control	Description
Event Mtg (event meeting), Description , Meeting Date , Meeting Start Time , and Meeting End Time	Enter the event meeting number. The system then displays the event description, meeting date, meeting start time, and meeting end time.
Status	Select the attendee's status regarding this meeting. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Attended</i> , <i>Invited</i> , <i>Not Attend</i> , and <i>Will Attend</i> .

Adding Communications, Checklists and Comments for Prospects

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

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

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

Related Links

"Understanding the 3C Engine" (Campus Community Fundamentals)

Creating Prospects When Posting External Test Scores

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

1. Load the test scores into a suspense table.

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

See [Understanding Performing Search/Match and Posting Test Scores](#).

Prerequisites

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

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

Related Links

[Mapping External Tests IDs](#)

Creating Prospects from Test Scores with Query

This section provides an overview and discusses how to:

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

Understanding Creating Prospects from Test Scores with Query

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

1. Create a query.

To access Query Manager, select **Reporting Tools > Query**.

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

To create a query for prospects, you must:

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

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

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

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

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

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

See Also

Product documentation for *PeopleTools: Query*

Prerequisites

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

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

6. (optional) Configure Test ID mapping options for academic interests, extracurricular activities, and religious preference.

Pages Used to Add Prospects From Test Scores Using Query

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Prospects from Tests	SAD_PRS_CREATE	<ul style="list-style-type: none"> • Student Admissions >External Test Score Processing >Create Prospects From Tests • Student Recruiting >External Test Score Processing >Create Prospects From Tests 	Create prospects from external test loads by querying the primary candidate date records that have been created through external test loads.
Select Query	SAD_QRY_SELECT	Click the Select Query button on the Create Prospects from Tests page.	Select a query of external test data to create prospects from test loads.

Creating Prospects by Querying External Test Loads

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

This example illustrates the fields and controls on the Create Prospects from Tests page. You can find definitions for the fields and controls later on this page.

Create Prospects from Tests

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

*Test ID
 Graduate Record Exam

Default Prospect Values

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

Prospect Select Query

Query Name:	None	<input type="button" value="Select Query"/>
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Note: Prospect records use the Last Prospect Date to determine if the program, plan, or subplan should appear in the prompts. If the Last Prospect Date is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the date is less than or equal to the current date, the system does not display the value in the prompt.

Additional Elements

Field or Control	Description
Test ID	<p>Enter the test ID for the query you want to run. When you search for a query on the Select Query page, the system searches for valid queries for the test ID that you enter. A valid query is set up to search the primary candidate data record for this test where the employee ID is the first field that you select. The system identifies the primary candidate data record from the External Data Mapping page.</p> <p>For example, when you enter <i>ACT</i> and then click the Select Query button, the system accesses the External Data Mapping page and locates the primary candidate data record for ACT, which is SAD_ACT_CD. When you click Search from the Select Query page, the system returns only those queries that have SAD_ACT_CD selected. In other words, the system returns the valid queries for the ACT test ID by accessing the candidate data record on the External Data Mapping page.</p>

Default Prospect Values

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

Field or Control	Description
Academic Program	Because the Academic Program table is keyed by admit term, you must enter an admit term in order to enter an academic program.
Assign 3C	Select this check box to assign 3Cs to the prospects that you create from the query. When you select this option, the Event ID field becomes available.

<i>Field or Control</i>	<i>Description</i>
Event ID	<p>Assign an event ID to the prospects that you create from the query. Only the event IDs that have the administrative functions <i>PROS</i> (prospect) and <i>PROP</i> (prospect program) are available. Prospect program is available only if you select an academic program on this page. Define event IDs on the Event Definition page.</p> <p>See "Defining 3C Engine Events" (Campus Community Fundamentals).</p>

Prospect Select Query

<i>Field or Control</i>	<i>Description</i>
Select Query	Click the link to access the Select Query page. You must select a query before you click the Run button.

Selecting a Query

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

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

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

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

Adding Prospects Through a System-wide Query

This section discusses how to:

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

Understanding Queries and Prospect Creation

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

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

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

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

See Also

Product documentation for *PeopleTools: Query*

Pages Used to Add Prospects Through a System-wide Query

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

Adding Prospects Through a System-wide Query

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

This example illustrates the fields and controls on the Create Prospects from Query page.

Create Prospects from Query

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

Default Prospect Values

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

Prospect Select Query

Query Name:

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

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

Selecting a Query

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

Related Links

[Selecting a Query](#)

Viewing Prospect Information

This section discusses how to view prospect information.

Pages Used to View Prospect Information

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

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

This section provides an overview and discusses how to:

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

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

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

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

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

Related Links

[Adding Prospects Through the Create/Update Prospects Component](#)

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Selection Crit (general selection criteria)	ADM_PERS_CAR_PARMS	Student Recruiting > Assign Recruiters > Recruiter Assignment > General Selection Crit	Use the General Selection Crit (general selection criteria) page to specify the prospect group for which you want to assign regions, recruiting categories, and recruiters.
Academic Selection Crit (academic selection criteria)	ADM_CAR_PARMS	Student Recruiting > Assign Recruiters > Recruiter Assignment > Academic Selection Crit	Enter any academic selection criteria for the prospect group.
Prog/Plan Selection Crit (program or plan selection criteria)	ADM_PROGRAM_PARMS	Student Recruiting > Assign Recruiters > Recruiter Assignment > Prog/Plan Selection Crit	Enter any academic program or academic plan selection criteria for the prospect group.

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

Using General Criteria to Select the Prospect Group

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

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

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

Academic Selection

Field or Control	Description
Institution and Academic Career	<p>Enter the academic institution and career and for this prospect group.</p> <p>If you do not enter an academic institution and an academic career, no prompt values exist for fields such as admit term, admit type, and referral source on the Acad Interests Selection Crit (academic interests selection criteria) page and the Program/Plan Selection Crit (program or plan selection criteria) page.</p>

<i>Field or Control</i>	<i>Description</i>
Last School Attended	Enter the last school attended to assign regions, recruiting categories, and recruiters based on this criterion.

Bio/Demo Selection

<i>Field or Control</i>	<i>Description</i>
Gender	Select <i>(none)</i> , <i>Female</i> , <i>Male</i> , or <i>Unknown</i> to assign regions, recruiting categories, and recruiters based on this criterion.
Citizenship Country	Enter a county of citizenship.
Citizenship Status	Select a citizenship status to assign regions, recruiting categories, and recruiters based on this criterion. You must specify a country of citizenship for values to exist for this field.
Marital Status	Select a marital status to assign regions, recruiting categories, and recruiters based on this criterion.

Address Selection

<i>Field or Control</i>	<i>Description</i>
Country and State	Enter the country and state to assign regions, recruiting categories, and recruiters based on these criteria.

Postal Code

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

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

Region Selection

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

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

Ethnic Group Selection

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

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

Using Academic Criteria to Select the Prospect Group

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

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

Field or Control	Description
Admit Term	Enter the admit term for this career and prospect group to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career on the General Selection Crit page.
Admit Type	Enter the admit type for this career to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career on the General Selection Crit page.
Campus	Enter a campus to assign regions, recruiting categories, and recruiters based on this criterion.

Field or Control	Description
Acad Load (academic load)	Select the appropriate academic load for this career to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career entered on the General Selection Crit page.
Acad Level (academic level)	<p>Select an academic level for this career to assign regions, recruiting categories, and recruiters based on this criterion.</p> <hr/> <p>Note: If you have not entered an academic institution and an academic career on the General Selection Crit page, there are no prompt values for these fields.</p> <hr/>
Recruiting Status	Select the recruiting status to assign regions, recruiting categories, and recruiters based on this criterion.
Created On	Enter the date that prospect records were created to assign regions, recruiting categories, and recruiters based on this criterion.
Referral Source	Enter the referral source to assign regions, recruiting categories, and recruiters based on this criterion.
Recruiting Center	Enter the recruiting center to which prospects in this career are assigned to assign regions, recruiting categories, and recruiters based on this criterion.
Housing	Select a housing interest for this prospect group to assign regions, recruiting categories, and recruiters based on this criterion.
Interested in Fin Aid (interested in financial aid)	Select this option to select a prospect group by those who indicate an interest in financial aid.
Not Interested in Fin Aid (not interested in financial aid)	Select this option to select a prospect group by those who have specified that they are not interested in financial aid.
Not Applicable	Select this option to select a prospect group regardless of their expressed interest in financial aid. This is the default setting.

Using Program and Plan Criteria to Select the Prospect Group

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

Field or Control	Description
Academic Program	Enter an academic program for this prospect group. Values depend upon the academic institution and career that you select on the General Selection Crit page. You can enter more than one academic program. If you enter more than one academic program (for example, Liberal Arts and Fine Arts) people who are in either the Liberal Arts or the Fine Arts academic programs are selected for this prospect group. Whenever you see a field in which you can scroll (First-Next-Previous-Last links) in this component, the OR logic applies; that is, one or the other must be true for that person to be selected. Contrast this to the AND logic discussed in the Using General Criteria to Select the Prospect Group section.
Campus	Enter a campus for this prospect group to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic program selected.
Recruiting Status	Select a recruiting status for this academic program if you want to assign regions, recruiting categories, and recruiters based on this criterion.
Recruiting Center	Enter a recruiting center for this academic program to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career you select and are subject to the user security established for recruiting centers.
Academic Plan	Enter an academic plan for the academic program in the Academic Program field to assign regions, recruiting categories, and recruiters based on this criterion. You can enter more than one academic plan. If you enter one academic plan, a person must have that plan to be selected for this prospect group. If you enter more than one academic plan, a person must have only <i>one</i> of the plans that you enter to be included in this prospect group.

Using Academic Interests Criteria to Select the Prospect Group

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

This example illustrates the fields and controls on the Acad Interests Selection Crit page . You can find definitions for the fields and controls later on this page.

General Selection CritAcademic Selection CritProg/Plan Selection CritAcad Interests Selection Crit

Run Control ID: 1Report ManagerProcess MonitorRun

☐ Priority☒ Non-Priority☐ Not Applicable

Find | View AllFirst1 of 1Last

*Subject Area

HISTHistory

Priority

FromTo Qty

+ -

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

Related Links

[Pages Used to Track Supporting Information for Prospects and Applicants](#)

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

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

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

Academic Selection Crit

Prog/Plan Selection Crit

Acad Interests Selection Crit

Assignment Crit

Run Control ID: 1

[Report Manager](#) [Process Monitor](#)

Run

Assignment Selection

☒ Regions

☒ Categories/Recruiters

Region From

☐ School

☐ Address

☒ Region Tree

NCAL

Northern California

Recruiting Categories

Find | View All First 1 of 1 Last

*Category: REGN Geographic Region

*Sub-Cat: Medium

*Existing Recrs: Merge

Multiple Recruiters - Assign

☐ All

☒ One

☐ None

☐ Primary

☐ Move to Application

Recruiters

Find | View All First 1 of 1 Last

Prompt Category Recruiters

*Recruiter ID

Primary

Assignment Selection

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

Region From

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

Field or Control	Description
School	Select this option to automatically assign a region for this prospect group, based on the primary location postal code of the school that the prospect last attended.
Address	Select this option to automatically assign a region for this prospect group, based on the home address postal code of the prospect.
Region Tree	Manually assign a region for this prospect group when you click the prompt on the Region field. Select a region from the list.

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

Recruiting Categories

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

Field or Control	Description
Category	Enter a recruiting category for this prospect group (for example, <i>HTST</i> (high test scores)). You can assign multiple recruiting categories. Define recruiting categories on the Recruiting Category Table page. Use these categories in the recruiting and application processes to target and report on students.
Sub-Cat (subcategory)	Select a recruiting subcategory, if known. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are (<i>none</i>), <i>High</i> , <i>Low</i> , and <i>Medium</i> . You can use a subcategory to indicate the priority of this recruiting category.
Existing Recrs (existing recruiters)	Select an option for handling existing recruiters for people in this prospect group. You can merge them or replace them with the recruiters that you are currently assigning. <i>Merge</i> appears by default.

Field or Control	Description
Move to Application	Select this check box to carry forward the recruiting categories to the application records when individuals in this prospect group apply to your institution. However, you must set up your installation defaults to allow the system to copy the recruiting category. Select the Recruiting Categories check box on the Installation Defaults - AD page.

Multiple Recruiters - Assign

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

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

Recruiters

Field or Control	Description
Prompt Category	<p>Use this field to assign recruiters to the prospect group for all recruiting categories other than <i>REGN</i>. Select <i>Categories</i> to view the list of recruiters for the category in the Recruiting Categories group box. Select <i>Recruiters</i> to display a list of all recruiters, regardless of their category.</p> <p>If you chose the <i>REGN</i> category, the Recruiting Categories and Recruiters group boxes become unavailable.</p>
Recruiter ID	Enter a recruiter ID for the prospect group. The list of recruiters that appears depends on what you entered in the Prompt Category field.

<i>Field or Control</i>	<i>Description</i>
Primary	Select this check box if you want to designate the recruiter as the primary recruiter.

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

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

Tracking Supporting Prospect and Applicant Information

Understanding Tracking Supporting Prospect and Applicant Information

You can:

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

Note: Recruiting and Admissions shares functionality with PeopleSoft Campus Community. For this reason, many of the pages covered by the topics listed above are documented in their entirety in PeopleSoft Campus Community Fundamentals product documentation.

Prerequisites for Tracking Supporting Prospect and Applicant Information

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

Related Links

[Adding New Applications Manually](#)

[Adding New Prospects and Applications with Quick Admit](#)

[Creating Applications from External Test Score Data](#)

[Understanding Adding Prospects](#)

Tracking Supporting Information for Prospects and Applicants

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

- Academic interests.
- Electronic addresses.

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

Pages Used to Track Supporting Information for Prospects and Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Interests	ADM_INTERESTS	<ul style="list-style-type: none"> • Student Recruiting > Maintain Prospects > Academic Information > Academic Interests • Student Admissions > Application Entry > Academic Information > Academic Interests 	<p>Record a person's external subject areas of interest, whether your institution offers them. You can also record the person's level of academic interest. For example, Pre-Law could be a person's first priority and Technology could be the person's second priority. You can use this information for recruiting purposes by determining what areas you offer that are similar to the person's preferences.</p> <p>This information is also valuable for reporting and academic program planning purposes.</p>

Page Name	Definition Name	Navigation	Usage
Test Results	STDNT_TEST_SCORE	<ul style="list-style-type: none"> • Student Recruiting > Maintain Prospects > Academic Information > Test Results • Student Admissions > Application Entry > Academic Information > Test Results • Student Recruiting > External Test Score Processing > Test Results or Student Admissions > External Test Score Processing > Test Results • Records and Enrollment > Transfer Credit Evaluation > Test Results 	<p>Enter test scores and related test information for a person manually. You can also load various test information into this page through an external test score load. Test results are stored under a person's name and can be used when evaluating any application for the person. Link test scores to an application on the Application Materials page.</p> <p>Store additional test score information by Test Date using the Common Attribute Framework.</p>
Test Summary	STDNT_TEST_SUMMARY	<ul style="list-style-type: none"> • Student Recruiting > Prospect Summaries > Academic Test Summary • Student Admissions > Applicant Summaries > Academic Test Summary • Records and Enrollment > Transfer Credit Evaluation > Academic Test Summary • Student Recruiting > External Test Score Processing > Academic Test Summary or Student Admissions > External Test Score Processing > Academic Test Summary 	<p>View a summary of academic test information for prospects and applicants. This page includes information such as test score and data source.</p>

Tracking Academic Interests for Prospects and Applicants

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

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

Academic Interests

Jane Smith
AD5023

Academic Career: Undergraduate

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

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

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

Subject Area	*Description	*Data Source	Priority		
BIOL	Biology	Self-Rptd	1		

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

Tracking Electronic Addresses for Applicants

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

See "Campus Self Service Overview" (Campus Self Service)

Tracking Extracurricular Activities for Prospects and Applicants

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

Tracking Honors and Awards for Prospects and Applicants

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

Related Links

"Tracking Honors and Awards" (Student Records)

Tracking Languages for Prospects and Applicants

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

Tracking Names for Prospects and Applicants

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

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

See [Entering and Updating Prospect Biographical Details](#).

Tracking Publications for Prospects and Applicants

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

See Also

"Entering Publications Data" (Campus Community Fundamentals)

Tracking Relations with Your Institution for Prospects and Applicants

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*.

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

Related Links

"Managing Relationships Data" (Campus Community Fundamentals)

Tracking Relationships for Prospects and Applicants

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

Related Links

"Managing Relationships Data" (Campus Community Fundamentals)

Tracking Residency Data for Prospects and Applicants

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

Related Links

"Entering Residency Data" (Campus Community Fundamentals)

Tracking Student Group Involvement for Prospects and Applicants

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

Related Links

"Tracking Student Groups" (Student Records)

Tracking Work Experience for Prospects and Applicants

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

See Also

"Tracking Work Experience" (Campus Community Fundamentals)

Tracking Test Results for Prospects and Applicants

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

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

Test Results

Timothy Kelly

1163

Tests

Find | View All

First 1 of 1 Last

*Test ID:

IELTS

International English Language

☒ Checklist Item Update

+ -

Defaults for Components

Test Date:

Data Source:

Acad Level:

Test Components

Personalize | Find | View All

First 1-4 of 5 Last

	*Component	Score	%tile	*Test Date	*Data Source	*Acad Level	Letter Score	Date Loaded	Index	Std Admin	
1	LISNG	7.50		11/27/2011	Ad-Hoc Org	Unknown	G	05/08/2013		<input checked="" type="checkbox"/>	+ -
2	OVRL	6.50		11/27/2011	Ad-Hoc Org	Unknown	G	05/08/2013		<input checked="" type="checkbox"/>	+ -
3	READ	5.50		11/27/2011	Ad-Hoc Org	Unknown	G	05/08/2013		<input checked="" type="checkbox"/>	+ -
4	SPKNG	6.00		11/27/2011	Ad-Hoc Org	Unknown	G	05/08/2013		<input checked="" type="checkbox"/>	+ -

Additional Test Data

Find | View All

First 1 of 1 Last

*Test Date

11/27/2011

+ -

Additional Test Values

Personalize | Find | View All

First 1-5 of 6 Last

	*Field	Text - 50	
1	IELTS_DOWNLOADID	279	+ -
2	IELTS_PARTNO	12	+ -
3	IELTS_CENTRENUMBER	ZX003	+ -
4	IELTS_CANDIDATEID	N99442929	+ -
5	IELTS_TRFNUMBER	04ZX000011SURF003G	+ -

Field or Control	Description
Test ID	Enter the test you are recording. Define tests on the Test Tables page.
Checklist Item Update	Select this check box to indicate that the checklist related to this row of data is updated when you run the Checklist Item Update Automated process. When you save the page, the system selects this check box automatically. To clear this check box, save the page, clear the check box, then save the page again.
Test Date	Select the date on which this test was taken. The value you enter here populates the corresponding field in the bottom region of the page.
Data Source	Select how this test information was reported. For example, the data could have been self-reported or received from a testing agency. The value you select here populates the corresponding field in the bottom region of the page. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Level (academic level)	Select the applicant's academic level at the time this test was taken. This level can be different from the applicant's current level. The value you enter here defaults to the corresponding field in the bottom region of the page. Values for this field are delivered with your system as translate values. You can modify these translate values.
Component	Enter the first test component. Values for this field are determined by the test ID that you enter. Define test components on the Test Component Table page and link them to tests on the Test Tables page.
Score %tile (score percentile)	Enter the score, percentile, or both for this test component.
Test Date	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the date if necessary.
Data Source	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.
Acad Level	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.
Letter Score	Enter a letter score for this test component, if applicable.

Field or Control	Description
Date Loaded	The default for the loaded date is your system date. Edit this field if necessary. If this information is electronically loaded, this field is automatically populated with your system date the day the data is loaded.
Index	The LSAT 3-Year Test Index appears if this information has been loaded.
Std Admin (standard administration)	The system selects this check box by default, which indicates that this test was administered in a standard way. Clear this check box if the test was administered in a nonstandard or non-timed way.
Go	Click this button to go to another component for this record.

Additional Test Data

This section enables you to store additional test score data that does not have a home in the core Campus Solutions records. Populate this section by test date with values for common attributes defined within the Common Attribute Framework. Attributes can be manually added on this page or can also be populated from the Prospect/Admissions Data Load process. The prompts in the Field column will display attributes associated on the record context for SAD_TESTDT.

See "Understanding Common Attribute Framework" (Campus Community Fundamentals)

See [Understanding Prospect/Admission Data Load Transactions](#)

Viewing Academic Test Summary Information for Prospects and Applicants

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

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

Academic Test Summary

Ronald Greene
AA0037

Test Summary by ID/Component

Test ID: GRE
Test Component:

Sort By

☒ Date
☐ Score
☐ Test
Search

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

	Test ID	Description	Score	%tile	Test Dt	Std Admin	Acad Level	Data Srce	Dt Loaded
1	GRE	Quantitative	630.00	53	09/08/2004	<input checked="" type="checkbox"/>	Master	ETS	09/09/2004
2	GRE	Verbal	710.00	97	09/08/2004	<input checked="" type="checkbox"/>	Master	ETS	09/09/2004
3	GRE	Writing	5.50	86	09/08/2004	<input checked="" type="checkbox"/>	Master	ETS	09/09/2004

Field or Control	Description
Test ID and Test Component	Enter the test ID and test component about which you want to view summary information.
Date, Score, or Test	Select the order in which you want the summary information to appear (for example, by date, score or test).
Search	Click to access information that matches your search criteria.

Viewing Event and Meeting Summary Information

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

Related Links

"Reviewing Events, Meetings, and Attendees" (Campus Community Fundamentals)

Viewing Schools by Groups

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

Related Links

"Reviewing Organization Data" (Campus Community Fundamentals)

Viewing an Account Summary

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

See "Viewing Application History" (Financial Aid).

Tracking External Education

Understanding External Education

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

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

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

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

Entering and Updating External Education Data

This section lists common elements and discusses how to:

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

Common Elements Used in This Section

<i>Field or Control</i>	<i>Description</i>
Transfer To	<i>Course Credits</i> appears by default. Enter a value and click Go to transfer to another component.

Field or Control	Description
Customize	<p>Click to ensure more efficient and flexible data entry by ordering or hiding tabs and fields.</p> <p>See <i>PeopleTools: Applications User's Guide</i></p>

Pages Used to Enter and Update External Data

Page Name	Definition Name	Navigation	Usage
External Education	SAD_EXT_EDUCATION	<ul style="list-style-type: none"> • Student Admissions > Application/Transcript Loads > Education > External Education • Student Recruiting > Maintain Prospects > Academic Information > Education > External Education • Student Admissions > Application Entry > Academic Information > Education > External Education • Records and Enrollment > Transfer Credit Evaluation > External Education > External Education 	Enter information about external careers, transcripts, and subjects. View school details.
External Education Comment	SAD_EXT_ED_COMM	Click the Comments link on the External Education page.	Enter transcript comments.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Courses and Degrees	SAD_EXT_EDUCATION2	<ul style="list-style-type: none"> • Student Admissions > Application/Transcript Loads > Education > Courses and Degrees • Student Recruiting > Maintain Prospects > Academic Information > Education > Courses and Degrees • Student Admissions > Application Entry > Academic Information > Education > Courses and Degrees • Records and Enrollment > Transfer Credit Evaluation > External Education > Courses and Degrees 	Enter external course defaults and information about external courses and degrees.
Grade Input History	SAD_EXT_CRS_GRD	Click the History link on the Courses and Degrees page.	View a history of grade changes.
Transfer Credit Detail	SAD_EXT_CRS_TRCR	Click the Referenced link on the Courses and Degrees page.	View transfer credit details about external courses.
External Course Comments	SAD_EXT_CRS_COMM	Click the Course Comment link on the Courses and Degrees page.	Enter comments about external courses.

Page Name	Definition Name	Navigation	Usage
Regional	SAD_EXT_EDUC_REG	<ul style="list-style-type: none"> • Student Admissions > Application/Transcript Loads > Education > Regional • Student Recruiting > Maintain Prospects > Academic Information > Education > Regional • Student Admissions > Application Entry > Academic Information > Education > Regional • Records and Enrollment > Transfer Credit Evaluation > External Education > Regional 	(CAN) Define previous education information for ESIS (Extended Student Information System) reporting.
Self Reported Courses	SAD_EXT_EDUC_TRCR	<ul style="list-style-type: none"> • Student Admissions > Application/Transcript Loads > Education > Self Reported Courses • Student Recruiting > Maintain Prospects > Academic Information > Education > Self Reported Courses • Student Admissions > Application Entry > Academic Information > Education > Self Reported Courses • Records and Enrollment > Transfer Credit Evaluation > External Education > Self Reported Courses 	Copy self-reported courses entered by the student on the Evaluate My Transfer Credit page to the Courses and Degrees page.

Entering External Education Data

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

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

External Education

Courses and Degrees

John Roberts

AD1000

School Information

Find | View All

First 1 of 1 Last

*External Org ID: 000010021 Williamsport High School

☒ Checklist Item Update

School Details

Location: Mailing Address

Country: USA United States

Address: 5 South Clifton Drive
Williamsport, MD 21795

School Characteristics

School Type: Secondary

School District:

☒ Accredited

☐ Transcript Translation Req

School Codes

ATP Code: 211090 FICE Code:

ACT Code: IPEDS Code:

NCES:

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

Career Data

Find | View All

First 1 of 1 Last

Data Number: 1

*Career: High Schl

Term Type: Semester

External Term: FALL Fall

Term Year: 1998

Academic Level: 11th Grade

☐ Dismissed from School

From Date: 01/09/1995

To Date: 01/06/1998

[Comments](#)

Transcript Status

*Action: Received

Transcript Date:

Date Received: 26/10/1998

Transcript Type:

Transcript Status: (Invalid Val)

Data Source: School

Data Medium: Hard Copy

Transcript Summary

Personalize | Find | View All

First 1 of 1 Last

Term GPA/Units Rank

	*Summary Type	External Term	Ext Year	Acad Level	Institution		
1	Grade 11	Fall	1998	11th Grade	PSU		

External Subjects

Personalize | Find | View All

First 1 of 1 Last

GPA Subject Totals

	*External Subject Area	*Course Level	Institution	GPA Type	External GPA	Converted GPA		
1			PSU					

Transfer To: Course Credits

Go

Field or Control	Description
External Org ID (external organization ID)	The source of the external data. The system automatically populates this field from the initial add of Last School Attended on the Prospect School/Recruiting page or the Application School/Recruiting page if a value is entered. You can edit this field.

Field or Control	Description
Checklist Item Update	Select this check box to indicate that the checklist that relates to this row of external data (or transcript) is updated when you run the Checklist Item Update Automated process. If you enter a value of <i>Received</i> in the Action field in the Transcript Status group box, this check box is automatically selected when you save the page.

School Details

Click the arrow to the left of School Details to view information about the external organization.

This data is populated from the Organization Table page and the Organization School Data page.

Career Data

Field or Control	Description
Data Number	The system populates this field automatically. The first data item (or row) you enter is <i>1</i> . The system numbers subsequent rows sequentially.
Career	Select the external career for this external data. Values for this field are delivered with your system as translate values.
Term Type	Select the term type that is used by the external organization. Values for this field are delivered with your system as translate values. Examples of the available values include <i>semester</i> and <i>quinmester</i> .
External Term	<p>Enter the external term to which this data relates. For example, if this is a Fall transcript, enter <i>FALL</i> in the External Term field. The available values depend on what you enter in the Term Type field. Define external terms on the External Term Table page.</p> <p>This field is optional; leave it blank until you are ready to enter transfer credit information.</p>
Term Year	<p>Enter the term year that is relevant to this external data entry. This field is optional; leave it blank until you are ready to enter transfer credit information.</p>

Field or Control	Description
Academic Level	Select the academic level of the person at the time the external data was collected or issued. This value might be different from the current academic level. Values for this field are delivered with your system as translate values.
From Date and To Date	Enter the dates of attendance for the career data that you entered.
Dismissed From School	Select this check box if the student was dismissed from the institution.

Transcript Status

Field or Control	Description
Action	<p><i>Desired</i> appears by default. Select the appropriate action for the transcript. Available values are <i>Desired</i> and <i>Received</i>. Leave the value as <i>Desired</i> if you are entering data for a transcript that you requested. Select a value of <i>Received</i> if the data is for a transcript that you have received.</p> <p>When the Action field is set to <i>Received</i>, you can link the data to an application on the Application Materials page.</p>
Transcript Date	Enter the date that the transcript was issued. The transcript date must not be later than the received date.
Date Received	Enter the date that your office received the transcript. The received date cannot occur before the transcript date.
Transcript Type	Select a transcript type. Values for this field are delivered with your system as translate values. These values default from the User Defaults 3 page if defaults are defined there.
Transcript Status	Select a transcript status. Values for this field are delivered with your system as translate values.
Data Source	Select the data source for this transcript. Values for this field are delivered with your system as translate values. These values default from the User Defaults 3 page if defaults are defined there.

Field or Control	Description
Data Medium	Select the format in which you received the transcript. Values for this field are delivered with your system as translate values. These values default from the User Defaults 3 page if defaults are defined there.
Comments	Click to access the External Education Comment page and enter transcript comments.

Transcript Summary

You can enter GPA (grade point average), units, and rank details for this data, which can be reported on a transcript, self-reported, or reported from another source. You can enter multiple transcripts (or similar data) under an external organization.

The layout of the page enables you to define how you want to represent a person's academic transcripts. You can associate one or more summaries for a single transcript. You can also enter the summary GPA, units, and rank of a person's entire academic career, or insert rows to create individual summaries that capture data for various segments of a person's academic career. Enter as many summary types as you require. This structure enables you to capture the GPA, rank, and units for each year of school, in addition to the overall summary, on one transcript.

Note: Many values on this page appear by default from the User Defaults 3 page, from pages in the Create/Maintain Organizations component, and from the data that you entered in the **Career Data** group box.

Term

Select the Term tab.

Field or Control	Description
Summary Type	Select the summary type for the external data. For example, you might select a summary of an entire high school transcript or a summary of grade 12 only. Define summary types on the External Summary Type Table page.
External Term and Ext Year (external year)	Select the external term and year relevant to the summary. Define external terms on the External Term Table page

Field or Control	Description
Acad Level (academic level)	Select the student's academic level at the time that this information was current, which may not be the student's current academic level. For example, this value could be a summary of a school year that the student has completed. As with the academic level for career data, you can choose which data to enter here and how to relate this academic level data to the career data.

GPA/Units

Select the GPA/Units tab.

This example illustrates the fields and controls on the External Education page: GPA/Units tab. You can find definitions for the fields and controls later on this page.

Transcript Summary								Customize	Find	View All	First	1-2 of 2	Last
Term	GPA/Units	Rank											
*Summary Type	GPA Type		Ext GPA	Conv GPA	Unit Type	Attempted	Completed						
1 Grade 12	100A	100 Pt A	85.000	3.800	Carnegie	4.00	4.00						
2 HS Overall	100A	100 Pt A	90.000	4.000	Carnegie	20.00	20.00						

Field or Control	Description
GPA Type (grade point average type)	Enter the GPA type that is used by the external organization. Define GPA types on the GPA Type Table page.
Ext GPA (external grade point average)	Enter the external GPA from the reported information. If you have defined external GPA values for this GPA type on the GPA Type Table page, you can prompt for those values here. Otherwise, you can enter the appropriate numeric GPA value.
Conv GPA (converted grade point average)	If you have defined GPA conversion rules, the system automatically converts the GPA based on the External GPA that you enter. If you have not defined GPA conversion rules, the value that you enter in the External GPA field is copied to the Conv GPA field.
Completed	The value in the Completed field is automatically populated from the value in the Attempted field. You can override this value. Enter the number of units that the student completed if it is different from the number of units that the student attempted.

Rank

Select the Rank tab.

This example illustrates the fields and controls on the External Education page: Rank tab. You can find definitions for the fields and controls later on this page.

Transcript Summary							Customize Find View All		First	1-2 of 2	Last
Term	GPA/Units	Rank									
1	Grade 12	Unweighted		Class Rank	Class Size	Percentile					
				23	325	93	+	-			
2	HS Overall	Unweighted		20	325	94	+	-			

Field or Control	Description
Class Rank and Class Size	Enter the student's rank in their class and the size of the class.
Percentile	The system automatically calculates the percentile based on the values entered in the Class Rank and Class Size fields.

External Subjects

External subject information can be reported on a transcript, self-reported, or reported from another source. Storing this data is useful for grouping subjects. For example, if your office tracks subject area requirements but does not want to enter or load all of the external courses that a student has taken, you can record course level, number of courses, units, external GPA, and converted GPA details about external subject areas. Define external subject areas on the External Subject Table page. You can add multiple rows to enter external subject data.

GPA

Select the GPA tab.

Field or Control	Description
Course Level	Select the course level taken in this area. Values for this field are delivered with your system as translate values.
GPA Type (grade point average type)	Enter the GPA type for the school that the student attended. Define GPA types on the GPA Type Table page.
External GPA (external grade point average)	Enter the external GPA that was earned by the student for this subject. If you have defined external GPA values for this GPA type on the GPA Type Table page, you can prompt for those values here. Otherwise, enter the appropriate GPA value.

Field or Control	Description
Converted GPA (converted grade point average)	If you have defined GPA conversion rules, the system automatically converts the GPA. If you have not defined GPA conversion rules, the GPA that you enter in the External GPA field is copied into the Converted GPA field.

Subject Totals

Select the Subject Totals tab.

This example illustrates the fields and controls on the External Education page: Subject Totals tab. You can find definitions for the fields and controls later on this page.

External Subjects									
GPA Subject Totals [Grid Icon]									
	*External Subject Area		Courses Attempted	Courses Completed	Units Attempted	Units Completed	Unit Type		
1	MATH	Math	4	4	4.00	4.00	Carnegie	+	-
2	ENGL	English	3	3	3.50	3.50	Carnegie	+	-

Field or Control	Description
Courses Completed	Enter the number of courses that the student completed if it is different from the number of courses the student attempted.
Units Completed	Enter the number of units that the student completed if it is different from the number of units that the student attempted.

Entering Transcript Comments

Access the External Education Comment page (Click the **Comments** link on the External Education page).

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

External Education Comment

ID:AD5502Shari Kirkland

External Org ID:000000001Cottonwood High School

External Career:High Schl

Data Number:1

Transcript Comments

Find | View AllFirst1 of 1Last

Created By:PS

Name:Locherty,Betty

Date Entered:10/15/2006

Default Comment:TRN Transcript Comment

Comment:Incomplete Transcript: Final Evaluation Pending.

Field or Control	Description
ID, External Org ID (external organization ID), External Career, and Data Number	You can enter multiple comments for each of these fields. Your user ID, name, and the date that you entered the comment will appear with each row.
Default Comment and Comment	If you enter a default comment, the Comment field is populated with the default text and you can enter more information. You can also add a comment without entering a default. Default comments are defined on the External Education Comments table.

Entering External Courses and Degrees

Access the Courses and Degrees page (**Student Admissions >Application/Transcript Loads >Education >Courses and Degrees**).

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

External Education

Courses and Degrees

Regional

Self Reported Courses

Shari Kirkland

AD5502

External Organization

Find | View All

First 1 of 1 Last

External Org ID:

000000001

Cottonwood High School

+ -

External Course Defaults

Data Number:

1

External Career:

High Schl

Apply Defaults

Data Source:

School

Term Type:

Semester

Acad Level:

Senior

External Term:

FALL

Fall

Institution:

PSUNV

PSU

Term Year:

2005

Course Type:

Course

Course Level:

Regular

Unit Type:

Carnegie

Units Taken:

1.00

Grading Scheme:

Ext 100pct

Grading Basis:

GRD

Graded

External Courses

Customize | Find | View All

First 1-2 of 2 Last

Course

Grades

Timeframe

Details

Transfer Credit/ Comments

Course Seq	*School Subject	Description	*Course Nbr	*Course Name		
1	ENGL	English	ENGL100	SPEECH	+ -	
2	MATH	Mathematics	MATH101	GEN MATH 2	+ -	

External Degrees

Customize | Find | View All

First 1 of 1 Last

Degree

Field of Study

Transcript

Degree	*Description	*Degree Date	*Data Source	*Degree Status	*Honors Category		
1	HSD	High School Diploma	12/01/2006	School	Progress	None	+ -

Transfer To:

Course Credits

Go

Note: Many values on this page appear by default from the User Defaults 3 page, from pages in the Create/Maintain Organizations component, and from the data that you entered on the External Education page.

Important! If you have to enter more than one course, use the **External Course Defaults** group box to enter information that is common to each course. This group box will save you data entry time.

External Course Defaults

Field or Control	Description
Data Number	If the courses that you enter are linked to a row of transcript data on the External Education page, enter the data number from that page. When you navigate out of this field, the system automatically populates a number of the remaining fields with the data that is linked to this data number. If the courses that you enter are <i>not</i> linked to a data number, do not enter a value in this field but complete the remaining fields.

Field or Control	Description
Term Type	If you select a value of <i>Other</i> , the Begin Date and End Date fields become available. If you select any other value, the External Term and Term Year fields become available.
Grading Scheme	Select the grading scheme to convert the grading scheme of the external school to your standards. Define grading schemes on the Grading Scheme Table page.
Apply Defaults	<p>Click to populate the default values to the first row of the External Courses group box. These defaults will then be applied to subsequent rows.</p> <p>You only need to apply the defaults once. If you enter another data number or change the default data, do not select the Apply Defaults button again. The new defaults will automatically apply to subsequent rows of course data that you enter.</p>

External Courses

When you click the **Apply Defaults** button, the system populates many values in the **External Courses** group box.

Important! Always apply defaults before you add multiple rows or enter any external course data.

Course

Select the Course tab.

Field or Control	Description
School Subject	Enter the school subject area for the course that you are entering. If you have set up a course catalog for this school, you can prompt for the valid values in this field. If a course catalog does not exist for this school, enter the subject.
Course Nbr (course number)	Enter the school course number for this course. If you have set up a course catalog for this school, you can prompt for the valid values in this field. If a course catalog does not exist for this school, enter the course number.

Field or Control	Description
Course Name	This field is populated when you enter a course number. You can override this value. For example, if Physical Education appears, you might add <i>Basketball</i> as extra text. You can also enter a course name if one is not automatically populated.

Grades

Select the Grades tab.

This example illustrates the fields and controls on the Courses and Degrees page: Grades tab. You can find definitions for the fields and controls later on this page.

Course Seq	Subject Area	Description	Units Taken	Grading Scheme	Grading Basis	Grade In	History	Official Grade
1	ENGL	English	1.00	Ext 100pct	GRD	83		2.3
2	MATH	Mathematics	1.00	Ext 100pct	GRD	94	History	3.4

Field or Control	Description
Units Taken	Appears by default from the value in the Units Taken field in the External Course Defaults group box. The default value is overridden if a value for External Units is defined on the School Course Classification page.
Grade In	Enter grades and grade changes. When you save grade changes, the History link appears.
History	Click to access the Grade Input History page and view a history of the grade changes. This link will only appear if a change was made to the value in the Grade In field.

Transfer Credit/Comments

Select the Transfer Credit/Comments tab.

This example illustrates the fields and controls on the Courses and Degrees page: Transfer Credit/Comments tab. You can find definitions for the fields and controls later on this page.

External Courses					
Course		Grades	Timeframe	Details	Transfer Credit/Comments
Course Seq	Transfer Credit	Transfer Credit Status	Transfer Credit Type	Course Comment	
1	<input checked="" type="checkbox"/>	Referenced	Other	Course Comment	+ -
2	<input checked="" type="checkbox"/>	Referenced	Other	Course Comment	+ -

Field or Control	Description
Transfer Credit	This check box is selected by default.
Transfer Credit Status	The Referenced link is available if the course was used in a Transfer Credit model articulation rule. Click to access the Transfer Credit Detail page and view transfer credit information about the course.
(CAN) Transfer Credit Type	This field is available if the Government Reporting check box for Canada is selected on the SA Features (student administration features) page.
Course Comment	Click to access the External Course Comments page and enter comments about courses.

External Degrees

Enter information about external degrees that are in progress or completed.

Degree

Select the Degree tab.

Field or Control	Description
Degree and Description	If you enter a value in the Degree field, the Description field is populated. If a degree value is not available, enter a description.
Degree Date	Enter the date that the degree was or will be granted.
Degree Status	<i>Complete</i> appears by default.

Field of Study

Select the Field of Study tab.

This example illustrates the fields and controls on the Courses and Degrees page: Field of Study tab. You can find definitions for the fields and controls later on this page.

<i>Field or Control</i>	<i>Description</i>
External Subject 1, Field of Study 1, External Subject 2, and Field of Study 2	When you enter external subject information, field of study information appears. If a subject area value is not available, enter the field of study information.

Transcript

Select the Transcript tab.

This example illustrates the fields and controls on the Courses and Degrees page: Transcript tab. You can find definitions for the fields and controls later on this page.

<i>Field or Control</i>	<i>Description</i>
Data Number	If this degree data is related to a specific transcript or source of information, select the data number of the transcript or other source. The system populates this field from the External Education page.

Entering Transfer Credit Detail

Access the Transfer Credit Detail page (Click the **Referenced** link on the Courses and Degrees page).

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

Transfer Credit Detail

EmplID: ADED03 Alexander Oregano
External Org ID: 000010146
Course Seq: 3
School Subject: MATH **Course Number:** 15
Course Name: Calculus I
Current Grade Input: A

Transfer Credit Detail				
Model Nbr	Articulation Term	Transfer Status	Units Taken	Grade Input
1	0570	Posted	4.00	A

View transfer credit information about courses. These values default from the Transfer Course Details page if the course tied to an articulation rule.

Note: Multiple transfer credit statuses may exist for each course because a course can be modeled more than once.

<i>Field or Control</i>	<i>Description</i>
Articulation Term	The term for which the transfer credit was processed.
Transfer Status	The status of the transfer credit model. The available values are <i>Submitted</i> , <i>Completed</i> , and <i>Posted</i> .

Entering External Course Comments

Access the External Course Comments page (Click the **Course Comment** link on the Courses and Degrees page).

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

External Course Comments

ID: ADED02 Franklin Gammage

External Org ID: 000000001 Cottonwood High School

School Subject: MATH Mathematics

Course Number: MATH104 ADV ALGEBRA

Course Comments

Find | View All First 1 of 1 Last

Created By: PS

Name: Locherty, Betty

Date Entered: 09/12/2006

Default Comment: CRS Course Comment

Comment: Course taken for honors credit.

Field or Control	Description
ID, External Org ID (external organization ID), School Subject, and Course Number	You can enter multiple comments for each of these fields. Your user ID, name, and the date that you enter the comment appears for each row.
Default Comment and Comment	If you enter a default comment, the Comment field is populated with the default text and you can enter more information. You can also add a comment without entering a default. Define default comments on the External Education Comments table.

(CAN) Entering Regional Data

Access the Regional page (Student Admissions >Application/Transcript Loads >Education >Regional).

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

External Education Courses and Degrees **Regional** Self Reported Courses

Shari Kirkland AD5502

▼ Canada

External Organization Find | View All First 1 of 1 Last

External Org ID: 000000001 Cottonwood High School

Additional Information Find | View All First 1 of 1 Last

Career: High School Data Number: 1

Trans Date: 04/11/2006 Transcript Type: Official Transcript Status: Mid-Year

Previous Educational Activity: Apprentice

Previous PostSecond Credential: Certificat

Transfer To: Course Credits Go

This page is available if the **Government Reporting** check box for Canada is selected on the SA Features page.

<i>Field or Control</i>	<i>Description</i>
Previous Educational Activity	Select the student's most recent educational activity.
Previous PostSecond Credential (previous postsecondary credential)	Select the type of credential that is associated with successful completion of the student's most recent postsecondary education.

Copying Self-Reported Courses

Access the Self Reported Courses page (**Student Admissions >Application/Transcript Loads >Education >Self Reported Courses**).

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

External Education

Courses and Degrees

Self Reported Courses

Shari Kirkland

AD5502

Self Reported Courses

Find | View All

First 1 of 1 Last

External Org ID: 000010143

Fresno City College

[Check All](#)

[Clear All](#)

External Courses

Personalize | Find | View All

First 1-5 of 8 Last

Course Data

Additional Information

	Copy to Education	School Subject	School Course Nbr	Course Name	Units Taken	Grade Input	External Term	Term Year	Course Level
1	<input type="checkbox"/>	ENGL	10	Reading and Composition	3.00	A	Fall	2004	Regular
2	<input type="checkbox"/>	BUSN	19	Business Law	3.00	B	Fall	2004	Regular
3	<input type="checkbox"/>	SOC	10	Introduction to Sociology	3.00	B	Fall	2004	Regular
4	<input type="checkbox"/>	MATH	10	College Algebra	3.00	B	Fall	2004	Regular
5	<input type="checkbox"/>	BUSN	19	Business Law	3.00	A	Spring	2005	Regular

Course Defaults

*Data Source

Self-Rpted

*Course Type

Course

Copy Selected Courses

Transfer To:

Course Credits

Go

This page is available if a student has modeled transfer credit through self service. Instead of entering external course information from an official transcript, you can copy some or all courses from self service to the Courses and Degrees page.

Course Data

Select the Course Data tab.

Field or Control	Description
Copy to Education	Select the check box for each course that you want to copy. Use the Check All link to copy all the courses.

Copy Selected Courses

Field or Control	Description
Copy Selected Courses	<p>Click to copy the course data to the Courses and Degrees page.</p> <p>A row is also added on the External Education page.</p> <p><i>Unofficial</i> appears by default in the Transcript Type field, and <i>Incomplete</i> appears by default in the Transcript Status field. To include copied courses in the automated application evaluation process, change the type to <i>Official</i> and the status to <i>Final</i> or <i>Mid Year</i>, or associate the course with an official transcript row by changing the data number associated with the course.</p>

Additional Information

Select the Additional Information tab.

This example illustrates the fields and controls on the Self Reported Courses page: Additional Information tab. You can find definitions for the fields and controls later on this page.

External Courses						
Personalize Find View All First 1-5 of 8 Last						
Course Data		Additional Information				
	Copy to Education	Grading Scheme	Grading Basis	External Term Type	Academic Institution	Course Copied
1	<input type="checkbox"/>	Undergrad	Graded	Semester	PSU	<input type="checkbox"/>
2	<input type="checkbox"/>	Undergrad	Graded	Semester	PSU	<input type="checkbox"/>
3	<input type="checkbox"/>	Undergrad	Graded	Semester	PSU	<input type="checkbox"/>
4	<input type="checkbox"/>	Undergrad	Graded	Semester	PSU	<input type="checkbox"/>
5	<input type="checkbox"/>	Undergrad	Graded	Semester	PSU	<input type="checkbox"/>

Field or Control	Description
Copy to Education	If a course is copied, the check box is unavailable and the course cannot be copied again.
Course Copied	If a course is copied, the check box is selected.

Note: After a course has been copied, any changes that a student makes in self service are not reflected on the Courses and Degrees page. Also, only the student can remove the courses that are displayed on the Self Reported Courses page through self service.

Viewing Summary Education Data for Prospects and Applicants

This section lists common elements and discusses how to:

- View external academic summary information.
- View external subject summary information.
- View external degree summary information.
- View external course summary information.

Common Elements Used in This Section

<i>Field or Control</i>	<i>Description</i>
Transcript Data	Click to access the Transcript Data page and view details about external transcripts.

Pages Used to View Summary Education Data for Prospects and Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Academic Summary	EXT_ACAD_SUMMARY	<ul style="list-style-type: none"> • Student Admissions > Applicant Summaries > Education Summary > External Academic Summary • Student Recruiting > Prospect Summaries > Education Summary > External Academic Summary 	View external academic summary information.
Transcript Data	TRANSCRIPT_SEC1	Click the Transcript Data link on the External Academic Summary page.	View information about external transcripts.
Academic Data Detail	EXT_ACAD_SEC	Click the Academic Data Detail link on the External Academic Summary page.	View external academic data.

Page Name	Definition Name	Navigation	Usage
External Subject Summary	EXT_SUBJ_SUMMARY	<ul style="list-style-type: none"> • Student Admissions > Applicant Summaries > Education Summary > External Subject Summary • Student Recruiting > Prospect Summaries > Education Summary > External Subject Summary 	View summaries of external subjects.
Transcript Data	TRANSCRIPT_SEC2	Click the Transcript Data link on the External Subject Summary page.	View information about external transcripts.
Academic Subject Detail	EXT_SUBJ_SUM_SEC	Click the Academic Subject Detail link on the External Subject Summary page.	View further details about an external subject summary.
External Degree Summary	EXT_DEGREE_SUMMARY	<ul style="list-style-type: none"> • Student Admissions > Applicant Summaries > Education Summary > External Degree Summary • Student Recruiting > Prospect Summaries > Education Summary > External Degree Summary 	View external degree summary information.
Transcript Data	TRANSCRIPT_SEC3	Click the Transcript Data link on the External Degree Summary page.	View information about external transcripts.
External Course Summary	EXT_COURSE_SUMMARY	<ul style="list-style-type: none"> • Student Admissions > Applicant Summaries > Education Summary > External Course Summary • Student Recruiting > Prospect Summaries > Education Summary > External Course Summary 	View external course summary information.

Page Name	Definition Name	Navigation	Usage
Transcript Data	TRANSCRIPT_SEC4	Click the Transcript Data link on the External Course Summary page.	View information about external transcripts.
External Course Detail	EXT_COURSE_DTL	Click the Course Detail link on the External Course Summary page.	View further details about external course summary information.

Viewing External Academic Summary Information

Access the External Academic Summary page (**Student Admissions >Applicant Summaries >Education Summary >External Academic Summary**).

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

External Academic Summary | External Subject Summary | External Degree Summary | External Course Summary

Moses Morning SFEK00064

Select Academic Data By

Acad Level: Org ID: Search

Data Source: Summary Type:

Institution: PSUNV Term Year:

Sort Academic Data By

Data Source:

Find | View All First 1 of 1 Last

Data Nbr	Organization	Institution	Sum Type	Data Source	Conv GPA	Percent	Units
1	Cottonwood High School	PSU	HS Overall	School	4.000	52	Transcript Data Academic Data Detail

Search for all academic summary information, or search by particular criteria, such as academic level or summary type. You can also sort the data in a particular order.

Field or Control	Description
Academic Data Detail	Click to access the Academic Data Detail page and view information about external academic data.

Viewing External Subject Summary Information

Access the External Subject Summary page (**Student Admissions >Applicant Summaries >Education Summary >External Subject Summary**).

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

Organization	Subject	Data Source	Crse Level	Nbr Crses	Units	Conv GPA
Cottonwood High School	MISC. Cour	School	Regular			

Search for all subject summary information, or search by particular criteria, such as academic level or subject. You can also sort the subjects in a particular order

Field or Control	Description
Academic Subject Detail	Click to access the Academic Subject Detail page and view further information about external subjects.

Viewing External Degree Summary Information

Access the External Degree Summary page (**Student Admissions >Applicant Summaries >Education Summary >External Degree Summary**).

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

Organization	Degree Date	Degree	Description	Degree Status
Cottonwood High School	05/26/2004	CERT	Certificate	Complete

Field or Control	Description
Sort Degree By	Indicate the order in which you want to view degree information.

Viewing External Course Summary Information

Access the External Course Summary page (**Student Admissions >Applicant Summaries >Education Summary >External Course Summary**).

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

External Academic Summary		External Subject Summary		External Degree Summary		External Course Summary																	
Moses Morning				SFEK00064																			
Select Courses By Acad Level: <input type="text"/> Org ID: <input type="text"/> <input type="button" value="Search"/> Data Source: <input type="text"/> Subject: <input type="text"/> Course Level: <input type="text"/> Term Year: <input type="text"/>						Sort Courses By <input type="text"/>																	
<div>Find View All First 1 of 1 Last</div> <table border="1"> <thead> <tr> <th>Organization</th> <th>Sch Subj</th> <th>Course</th> <th>Description</th> <th>Acad Level</th> <th>Data Source</th> <th>Units</th> <th>Grade</th> </tr> </thead> <tbody> <tr> <td>Cottonwood High School</td> <td>FNLN</td> <td>FNLN2</td> <td>SPANISH 2</td> <td>Unknown</td> <td>Self-Rptd</td> <td>3.00</td> <td>4.3</td> </tr> </tbody> </table>								Organization	Sch Subj	Course	Description	Acad Level	Data Source	Units	Grade	Cottonwood High School	FNLN	FNLN2	SPANISH 2	Unknown	Self-Rptd	3.00	4.3
Organization	Sch Subj	Course	Description	Acad Level	Data Source	Units	Grade																
Cottonwood High School	FNLN	FNLN2	SPANISH 2	Unknown	Self-Rptd	3.00	4.3																
						Transcript Data Course Detail																	

Search for all course summary information, or search by particular criteria, such as academic or course level. You can also sort the courses in a particular order.

Field or Control	Description
Course Detail	Click to access the External Course Detail page and view further information about external courses.

Tracking General and Application Materials for Prospects and Applicants

Entering General Materials for Prospects and Applicants

This section discusses how to:

- Enter general materials.
- Add details about the recommender.
- View general materials summary information for prospects and applicants.
- Manually associate supporting materials to an application.
- Link general materials to applications.

Pages Used to Enter General Materials for Prospects and Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Materials	GENL_MATERIALS	<ul style="list-style-type: none"> • Student Admissions > Application Evaluation > Evaluate Application Materials > General Materials • Student Recruiting > Evaluate Prospects > General Materials 	<p>Enter supporting information for prospects and applications. The type of information you record here is the information that you defined as a general material type. For example, PeopleSoft considers essays, portfolios, recommendations and interviews as general materials.</p> <p>General material data is linked to a <i>person</i>, so anything that you enter on this page can be used to evaluate any applications for this person. After you have identified the general materials, you can link them to applications and evaluations.</p>
Recommender Information	ORG_DATA_PANEL	Click the Recommender Information link on the General Materials page.	Add details about the recommender.

Page Name	Definition Name	Navigation	Usage
Address Information	ADDR_INFO_PANEL	Click the Address Information link on the General Materials page.	View, add, or edit a recommender's mailing or email address. If you select an address location on the Recommender Information page, the system automatically populates the address on this page. Conversely, you can manually enter the mailing address information you have for this recommender. Note that if this is an address of an organization, any changes you enter do not affect the addresses that are stored elsewhere in the system for the school or organization with which this recommender is affiliated.
General Materials Summary	GENL_MATL_SUMMARY	<ul style="list-style-type: none"> • Student Admissions > Applicant Summaries > General Materials Summary • Student Recruiting > Evaluate Prospects > General Materials Summary 	View any general materials stored for a person. You can display the information by material group or material type.
Recommender	RECOMMENDER_SEC1	Click the Recommender link on the General Materials Summary page.	View further details about general materials summary information. This Recommender Detail page is available with a <i>Recommendation</i> material type entry.

Entering General Materials

Access the General Materials page (**Student Admissions > Application Evaluation > Evaluate Application Materials > General Materials** or **Student Recruiting > Evaluate Prospects > General Materials**).

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

Note: The fields on this page vary depending on the material group type you select. The material data that is attached to this type dictates what fields are available. For example, the **Recommender Information** and **Address Information** links enable you to enter information and addresses about recommenders. However, these links appear on the page only when the material type is *REC* (recommendation).

Field or Control	Description
Material Group	Enter the material group to which you are associating this applicant. Only material groups that include a material type that is marked General Material are available to select. Define material groups on the Material Group Table page.
Material Type	Enter a material type. Only general material types from this material group are available. Material types are associated with groups on the Material Group Table page.
Material Nbr (material number)	This display-only field shows which general material entry you are viewing for this person. For example, the first general material entry is number 1, and the second is number 2.
Checklist Item Update	When you add a new material group row, the system automatically selects this check box. The check box indicates that the checklist related to this row of general material data is updated when you run the Checklist Item Update Automated process.

Field or Control	Description
Date Received	The system uses the system date as the default date on which materials were received. You can edit this field.
Date Recorded	The system uses the system date as the default date on which materials were recorded. You can edit this field.
Rcmd Type (recommender type)	Which remaining fields are available to you depends on the variable data that is associated with the material type that you select. In the example, you enter the recommender type. Values for this field are delivered with your system as translate values. You can modify these translate values.
Comments	Enter any notes or text for this general materials entry.
Recommender Information	This link appears when you select the <i>REC</i> (recommendation) material type. Click this link to add details about the recommender. The Recommender Information page appears.
Address Information	This link appears when you select the <i>REC</i> (recommendation) material type. Click this link to view, add, or edit the mailing or email address for this recommender. The Address Information page appears.

Attachments

Field or Control	Description
Add Attachment	Click this button to add a file attachment to the page.

Adding Details About the Recommender

Access the Recommender Information page (Click the Recommender Information link on the General Materials page).

Field or Control	Description
ID	If this recommender is in your database, enter the person's ID.
Name	If you enter an ID, the recommender's name automatically appears. If you do not enter an ID because this recommender is not in your database, type in the recommender's name.
Title	Enter the recommender's title.

Field or Control	Description
Org ID (organization identification)	If the recommender is affiliated with a school or organization in your database, enter the organization ID. The name of the organization automatically appears. Leave this field blank if the recommender is not associated with a school or organization in your database and type in the name of the organization.
Location	If you enter an organization ID, you can choose any defined address for the organization or school that you want to use as a mailing address for the recommender.
Org Name (organization name)	The system automatically populates the organization name if you enter an organization ID. Type in the organization name if the organization does not already exist in your database.

Viewing General Materials Summary Information for Prospects and Applicants

Access the General Materials Summary page (**Student Admissions >Applicant Summaries >General Materials Summary** or **Student Recruiting >Evaluate Prospects >General Materials Summary**).

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

General Materials Summary

Moses Morning SFEK00064

Select Materials By
Material Group:
Material Type:

Sort Materials By
☒ Material Group
☐ Material Type

Find View All First 1 of 1 Last					
Material Group	Material Type	Matl Nbr	Date Recvd	Dt Record	Type
Graduate Recommendations	Recommendation	1	09/10/2004	09/10/2004	Recommender

You must first enter general material information for this person in the General Materials page.

Select Materials By

Field or Control	Description
Material Group	Enter a material group to search for a summary of general materials for this person based on material group.
Material Type	Enter a material type to search for a summary of general materials for this person based on material type.

Sort Materials By

<i>Field or Control</i>	<i>Description</i>
Material Group	Enter a material group to sort the findings by material group.
Material Type	Enter a material type to sort the findings by material type.
Search	Click the Search button to locate information that matches your search criteria.

Other Page Elements

<i>Field or Control</i>	<i>Description</i>
Recommender	Click to view additional details about general materials summary information for a particular row.

Manually Associating Supporting Materials to an Application

Access the Application Materials page (**Student Admissions >Application Entry >Application Materials >Application Materials**).

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

Application Materials

Moses Morning
SFEK00064

Academic Career: Undergraduate
Application Nbr: 00024116

Prog Nbr: 0
Academic Program: Liberal Arts Undergraduate

	Material Group		Available Materials
Test Scores:	UGTESTS	Undergraduate Test Scores	Test Scores
Academic Summary:	UGSUMMRY	Undergraduate Academic Summary	Academic Summary
External Courses:	UGCRSES	Undergraduate External Courses	External Courses
External Subjects:	UGSUBJCT	Undergraduate Subjects	External Subjects
Transcripts:	UGTSCRPT	UG External Transcripts	Transcripts
			General Materials

An application for this person must already exist.

Field or Control	Description
Test Scores	<p>To link a test score group to this application, enter a material group for the test scores material type. Only groups that include a test scores material type are available. Define material groups on the Material Group Table page.</p> <p>After you enter a test score material group, click the Test Scores link to view a list of test scores that are associated with this applicant. The Select Test Scores page appears.</p>
Academic Summary	<p>To link an academic summary group to this application, enter a material group for the academic summary material type. Only those groups that include an academic summary material type are available.</p> <p>After you enter an academic summary material group, click the Academic Summary link to view a list of academic summaries that are associated with this applicant. The Select Academic Summary Data page appears.</p>
External Courses	<p>To link an external course group to this application, enter a material group for the external courses material type. Only those groups that include an external courses material type are available.</p> <p>After you enter an external course material group, click the External Courses link to view a list of external courses that are associated with this applicant. The Select External Courses page appears.</p>
External Subjects	<p>To link an external subject group to this application, enter a material group for the external subjects material type. Only those groups that include an external subjects material type are available.</p> <p>After you enter an external subjects material group, click the External Subjects link to view a list of external courses that are associated with this applicant. The Select External Subjects page appears.</p>
Transcripts	<p>To link transcripts to this application, enter a material group for the transcripts material type. Only those groups that include a transcripts material type are available.</p> <p>After you enter a transcripts material group, click the Transcripts link to view a list of transcripts that are associated with this applicant. The Select Transcripts page appears.</p>
General Materials	<p>Click to link general materials to this application. The Select General Materials page appears, where you can view a list of general materials that are associated with this applicant.</p>
Go	<p>Click this button to go to another component.</p>

Related Links

[Assigning Evaluation Codes to Applications in Batch](#)

Linking General Materials to Applications

Access the Select General Materials page (Click the General Materials link on the Application Materials page).

<i>Field or Control</i>	<i>Description</i>
Recommender Detail	If an interviewer or recommended is linked to a general material entry, click the Recommender Detail link to view information about that person.

Linking Materials to an Application

This section discusses how to link materials to an application.

Pages Used to Link Materials to an Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Materials	ADM_APPL_MATL	Student Admissions > Application Entry > Application Materials > Application Materials	Manually associate application materials to an application. If the information for this person is stored elsewhere in the database, you can link the relevant data to an application on this page.
Select Test Scores	APPL_SCORES_SP	After choosing a test score material group, click the Test Scores link on the Application Materials page.	View test scores that are associated with this applicant. Select the test IDs that you want to link to this application. All tests for this applicant that are not already linked to this application are available on this page. Select only those tests that are relevant to this material group and application. You can enter tests for a applicant on the Test Results page.

Page Name	Definition Name	Navigation	Usage
Select Academic Summary Data	APPL_ACAD_SUMM_SP	After choosing an academic summary material group, click the Academic Summary link on the Application Materials page.	Link an academic summary group to this application. the system stores all academic summaries for this applicant that are not already linked to this application are available on this page. Select only those academic summaries that are relevant to this material group and application. You can enter academic summaries for an applicant on the External Education page.
Select External Courses	APPL_COURSE_SP	After you choose an external course material group, click the External Courses link on the Application Materials page.	Link external courses to this application. Select the external courses that you want to link to this application. All external courses for this applicant that are not already linked to this application are available on this page. Select only those external courses that are relevant to this material group and application. You can enter external courses for an applicant on the Courses and Degrees page .
Select External Subject	APPL_SUBJECTS_SP	After you choose an external subjects material group, click the External Subjects link on the Application Materials page.	Link external subjects to this application. Select the external subjects that you want to link to this application. All external subjects for this applicant that are not already linked to this application are available on this page. Select only those external subjects that are relevant to this material group and application. You can enter external subjects for an applicant on the External Education page.

Page Name	Definition Name	Navigation	Usage
Select Transcripts	APPL_TRANSCRIPT_SP	After you choose a transcripts material group, click the Transcripts link on the Application Materials page.	Link transcripts to this application. Select the transcripts that you want to link to this application. All transcripts for this applicant that are not already linked to this application are available on this page. Select only those transcripts that are relevant to this material group and application. You can enter transcript information for an applicant on the External Education page.
Select General Materials	APPL_MATL_SP	Click the General Materials link on the Application Materials page.	Link general materials to this application. Select only those general materials that you want to link to this application. All general materials for this applicant that are not already linked to this application are available on this page. You can enter general materials for an applicant on the General Materials page.
Recommender Detail	INTERVIEWER_SEC2	Click the Recommender Detail link on the Select General Materials page.	View information about an interviewer or a recommender.

Viewing Summary Application Materials Information

This section discusses how to:

- View materials summary information.
- View academic summary information.
- View academic subjects summary information.
- View course summary information.

Related Links

[Prerequisites for Tracking Supporting Prospect and Applicant Information](#)

Pages Used to View Summary Application Materials Information

Page Name	Definition Name	Navigation	Usage
Materials Summary	APPL_MATL_SUMMARY	Student Admissions > Applicant Summaries > Application Materials Summary > Materials Summary	View summary information regarding materials assigned to a person, and associated with a particular application and academic program.
Interviewer Detail	INTERVIEWER_SEC	Click the Interviewer Detail link on the Materials Summary page.	View additional interview information.
Recommender Detail	RECOMMENDER_SEC	Click the Recommender Detail button on the Materials Summary page.	View additional recommender information.
Test Score Summary	APPL_TEST_SUMMARY	Student Admissions > Applicant Summaries > Application Materials Summary > Test Score Summary	View summary test scores information that is associated with a particular application and academic program.
Transcripts Summary	APPL_TRNS_SUMMARY	Student Admissions > Applicant Summaries > Application Materials Summary > Transcripts Summary	View summary transcript information that is associated with a particular application and academic program.
Academic Summary	APPL_SUMM_SUMMARY	Student Admissions > Applicant Summaries > Application Materials Summary > Academic Summary	View academic summary information that is associated with a particular application and academic program. You can view the data in a variety of formats, depending on your selection criteria.
Application Summary Detail	APPL_SUMM_SEC	Click the App Summary Detail link on the Academic Summary page to view the Application Summary Detail page.	View application detail information.
Academic Subjects Summary	APPL_SUBJ_SUMMARY	Student Admissions > Applicant Summaries > Application Materials Summary > Academic Subjects Summary	View summary information about academic subjects that are associated with a particular application and academic program.

Page Name	Definition Name	Navigation	Usage
Academic Subject Detail	APPL_SUBJ_SUM_SEC	Click the Acad Subject Detail button on the Academic Subjects Summary page to view the Application Subject Detail page.	View application subject information.
Course Summary	APPL_CRSE_SUMMARY	Student Admissions > Applicant Summaries > Application Materials Summary > Course Summary	View summary course information that is associated with a particular application and academic program.
Transcript Data	APPL_CRSE_TRAN_SEC	Click the Transcript Data link to open the Transcript Data page.	View transcript data.
Application Course Detail	APPL_CRSE_SEC	Click the App Course Detail link to open the Application Course Detail page.	View an applicant's course detail information.

Viewing Materials Summary Information

Access the Materials Summary page (**Student Admissions > Applicant Summaries > Application Materials Summary > Materials Summary**).

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

Materials Summary					
Dario Miselli		ID	AD6999		
Academic Career: Undergraduate		Application Nbr:	00024151		
Prog Nbr: 0		Academic Program:	Liberal Arts Undergraduate		
Material Group	Material Type	Material Nbr	Date Recorded	Type	
					Detail

You must first attach materials to the application on the Application Materials page.

Field or Control	Description
Interviewer Detail	Click this link to view about interviewer information about this material type. The Interviewer Detail page appears.
Recommender Detail	Click this link to view recommender information about this material type. The Recommender Detail page appears.

Viewing Academic Summary Information

Access the Academic Summary page (**Student Admissions >Applicant Summaries >Application Materials Summary >Academic Summary**).

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

Materials Summary	Test Score Summary	Transcripts Summary	Academic Summary	Academic Subjects Summary
Dario Miselli		ID	AD6999	
Academic Career: Undergraduate		Application Nbr:	00024151	
Prog Nbr: 0		Academic Program:	Liberal Arts Undergraduate	
Select Academic Summary By				
Acad Level:	<input type="text"/>	Data Source:	<input type="text"/>	Sum Type: <input type="text"/>
Org ID:	<input type="text"/>	Institution:	PSUNV	Term Year: <input type="text"/>
Data Nbr	Organization	Institution	Sum Type	Data Source
1	Redondo Union High School	PSU	HS Overall	School
			3.880	99
			20.00	Transcript Data App Summary Detail

Field or Control	Description
Acad Level (academic level)	Select the academic level for which you want to search for academic summary information.
Org ID (organization ID)	Enter the organization ID for which you want to search for academic summary information.
Data Source	Select the data source for which you want to search for academic summary information.
Institution	Enter the academic institution for which you want to search for academic summary information.
Sum Type (summary type)	Enter the summary type for which you want to search for academic summary information.
Term Year	Enter the term year for which you want to search for academic summary information.
Search	Click this button to view information matching your search criteria.
App Summary Detail (application summary detail)	Click this link to view application summary details. The Application Summary Detail page appears.

Viewing Academic Subjects Summary Information

Access the Academic Subjects Summary page (**Student Admissions >Applicant Summaries >Application Materials Summary >Academic Subjects Summary**).

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

Materials Summary		Test Score Summary		Transcripts Summary		Academic Summary		Academic Subjects Summary	
Dario Miselli				ID		AD6999			
Academic Career: Undergraduate				Application Nbr:		00024151			
Prog Nbr: 0				Academic Program:		Liberal Arts Undergraduate			
Select Subject By									
Acad Level:		Data Source:		Subject:		<input type="text"/>		<input type="button" value="Search"/>	
Org ID:		Course Level:		Term Year:					
Organization	Subject	Data Source	Crse Level	Nbr Crses	Units	Conv GPA			
Redondo Union High School	Math	School	Honors				Transcript Data	Acad Subject Detail	
Redondo Union High School	English	School	AP				Transcript Data	Acad Subject Detail	
Redondo Union High School	Economics	School	AP				Transcript Data	Acad Subject Detail	
Redondo Union High School	Biology	School	Regular				Transcript Data	Acad Subject Detail	

Field or Control	Description
Acad Level (academic level)	Select the academic level for which you want to search for academic subjects summary information.
Org ID (organization ID)	Enter the organization ID for which you want to search for academic summary information.
Data Source	Select the data source for which you want to search for academic subjects summary information.
Course Level	Select the course level for which you want to search for academic subjects summary information.
Subject	Enter the subject for which you want to search for academic subjects summary information.
Term Year	Enter the term year for which you want to search for academic subjects summary information.
Search	Click the Search button to view information matching your search criteria.
Acad Subject Detail (academic subject detail)	Click this link to view academic subject details. The Application Subject Detail page appears.

Viewing Course Summary Information

Access the Course Summary page (**Student Admissions >Applicant Summaries >Application Materials Summary >Course Summary**).

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

Organization	Sch Subj	Course	Description	Acad Level	Data Source	Units	Grade
Redondo Union High School	BUSN	BUSN1	Business 101	12th Grade	School	3.00	A

You must first attach course summaries to the application on the Application Materials page.

Field or Control	Description
Acad Level (academic level)	Select the academic level for which you want to search for course summary information.
Org ID (organization ID)	Enter the organization ID for which you want to search for course summary information.
Data Source	Select the data source for which you want to search for course summary information.
Course Level	Select the course level for which you want to search for course summary information.
Subject	Enter the subject for which you want to search for course summary information.
Search	Click the Search button to view information matching your search criteria.
Transcript Data	Click this link to view transcript data. The Transcript Data page appears.
App Course Detail (application course detail)	Click this link to view application course details. The Application Course Detail page appears.

Chapter 19

Viewing Groups of Prospects or Applicants

Viewing Prospects and Applicants by Organization

This section discusses how to:

- View prospects by organization.
- View contact information.
- View applicants by organization.

Pages Used to View Prospects and Applicants by Organization

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Prospects by Organization	ORG_PRSP_SUMMARY	Student Recruiting > External Org Summaries > Org Admissions Summary > Prospects by Organization	View lists of prospects that are associated with a particular external organization and display the records in the order you choose. You can narrow the scope to view only certain prospects that are associated with an external organization.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Programs link on the Prospects by Organization page.	View a list of programs for a prospect.
Organization Primary Location	EXT_ORG_PRIM_LOC	Click the Org Primary Location link on the Prospects by Organization page.	View the primary address of the organization or school.
Organization School Information	SCHOOL_INFO	Click the School Information link on the Organization Primary Location page.	View additional information regarding a school.
Contact Information	EXT_ORG_CNTCT_SEC	Click the Contact Information link on the Prospects By Organization page.	View any contacts that are associated with this school.
Organization Contact Detail	EXT_ORG_CNTCT_PHN	Click the Details link on the Contact Information page.	View a contact's address, email address, and phone numbers.

Page Name	Definition Name	Navigation	Usage
Applicants by Organization	ORG_APPL_SUMMARY	Student Recruiting > External Org Summaries > Org Admissions Summary > Applicants by Organization	View lists of applicants that are associated with a particular organization or school and display the records in the order you choose. You can narrow the scope to view only certain applicants that are associated with a school.
Applicant Programs	ORG_APPL_P_SEC	Click the Applicant Programs link.	View a listing of academic programs for an applicant.

Viewing Prospects by Organization

Access the Prospects by Organization page (**Student Recruiting > External Org Summaries > Org Admissions Summary > Prospects by Organization**).

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

Prospects by Organization
Applicants by Organization

External Org ID: 000000001

Cottonwood High School

LAUUGRD0505

[Org Primary Location](#)

Organization Type: School

Proprietorship: Public

[Contact Information](#)

Select Prospects By

Institution: PSUNV

Admit Term:

Search

Career: UGRD

Recruiting Status:

Acad Prog:

Applied:

Sort Prospects By

☒ Career
☐ Admit Term
☐ Recruiting Status

Find | View 100 First 1-5 of 131 Last

	ID	Name	Career	Institution	Admit Term	Rcrtg Stat	Applied
Carry ID	AA0037	Greene,Ronald	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> Prospect Programs
Carry ID	AD5022	Smith,Doug	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> Prospect Programs
Carry ID	AD5023	Smith,Jane	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> Prospect Programs
Carry ID	AD5024	Smith,John	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> Prospect Programs
Carry ID	AD5025	Smith,Amy	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> Prospect Programs

Field or Control	Description
Institution	Enter the academic institution for which you want to search for prospect information.
Career	Enter the academic career for which you want to search for prospect information.
Acad Prog (academic program)	Enter the academic program for which you want to search for prospect information.

Field or Control	Description
Admit Term	Enter the admit term for which you want to search for prospect information.
Recruiting Status	Select the recruiting status for which you want to search for prospect information.
Applied	Select to view records for prospects who applied to your institution.
Sort Prospects By	Select whether you want to view prospects by career, admit term, or recruiting status.
Search	Click this button find the prospects that match your search criteria. the system displays matches in the bottom portion of the page.
Carry ID	Click this button to carry forward this person's ID to the next page.
Prospect Programs	Click this link to view a listing of the academic programs for a prospect. The Prospect Programs page appears.
Org Primary Location (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.
Contact Information	Click this link to view any contacts that are associated with this school. The Contact Information page appears.

Viewing Applicants by Organization

Access the Applicants by Organization page (**Student Recruiting >External Org Summaries >Org Admissions Summary >Applicants by Organization**).

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

Prospects by Organization
Applicants by Organization

External Org ID: 000000001 Cottonwood High School [Org Primary Location](#)
Organization Type: School Proprietorship: Public [Contact Information](#)

Select Applicants By

Institution: PSUNV
Career: UGRD
Admit Type:
Admit Term:
Academic Program:
Status:

Search

Sort Applicants By

- ☒ Career
- ☐ Admit Term
- ☐ Admit Type
- ☐ Status

	ID	Name	Appl Nbr	Career	Institution	Admit Type	Complete	
	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year		Applicant Programs
	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year		Applicant Programs
	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year		Applicant Programs
	AD5022		00022766	Undergrad	PSU	First-Year		Applicant Programs
	AD5022		00022766	Undergrad	PSU	First-Year		Applicant Programs

Field or Control	Description
Career and Institution	These values are based on your user defaults. Edit the values if necessary.
Admit Type	Enter an admit type.
Admit Term	Enter the admit term of the applicants you want to view.
Acad Program (academic program)	Enter an academic program.
Status	Select a status to view applicants with a particular program status. For example, you might want to view only those applicants with a <i>Cancelled</i> or <i>Waitlisted</i> status.
Acad Career (academic career), Admit Term , Admit Type , and Status	Select an option to view prospects by academic career, admit term, admit type, or status.
Search	Click this button to view the applicants that match your search criteria. The system displays matches in the bottom portion of the page.
Carry ID	Click this button to carry forward this person's ID to the next page.
Applicant Programs	Click this link to view the applicant program details. The Applicant Programs page appears.

Field or Control	Description
Org Primary Location (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.
Contact Information	Click this link to view contacts that are associated with this school. The Contact Information page appears.

Viewing Prospects and Applicants Assigned to a Specific Recruiter

This section discusses how to:

- View prospects assigned to a specific recruiter by category.
- View applicants assigned to a specific recruiter by category.
- View prospects assigned to a specific recruiter by region.
- View applicants assigned to a specific recruiter by region.

Pages Used to View Prospects Assigned to a Specific Recruiter by Category

Page Name	Definition Name	Navigation	Usage
Prospects by Category	RCR_PRSP_CAT_SUMM	Student Recruiting > Student Recruiters > Summaries > Recruiter Summary > Prospects By Category	View lists of prospects that are associated with a particular recruiter for any category to which the recruiter is assigned and determine the order in which the records appear.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Program link on the Prospects by Category page.	View a listing of programs for a prospect.
Applicants by Category	RCR_APPL_CAT_SUMM	Student Recruiting > Student Recruiters > Summaries > Recruiter Summary > Applicants by Category	View lists of applicants that are associated with a particular recruiter for any category to which the recruiter is assigned and determine the order in which the records appear.

Page Name	Definition Name	Navigation	Usage
Program Summary	ADM_APPL_P_SEC	Click the Program Detail link on the Applicants by Category page.	View a list of programs for an applicant.
Prospects by Region	RCR_PRSP_REG_SUMM	Student Recruiting > Student Recruiters > Summaries > Recruiter Summary > Prospects by Region	View lists of prospects that are associated with a particular region and assigned to a particular recruiter and determine the order in which the records appear. For example, you can search by the last school attended or by region.
Prospect Programs	ADM_PRSPCT_R_SEC	Click the Prospect Programs link on the Prospects by Region page.	View any program information that exists for a prospect.
Applicants by Region	RCR_APPL_REG_SUMM	Student Recruiting > Student Recruiters > Summaries > Recruiter Summary > Applicants By Region	View lists of applicants that are associated with a particular region and assigned to a particular recruiter and determine the order in which the records appear. For example, you can search by the last school attended or by region.

Viewing Prospects Assigned to a Specific Recruiter by Category

Access the Prospects by Category page (**Student Recruiting > Student Recruiters > Summaries > Recruiter Summary > Prospects By Category**).

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

Prospects By Category		Applicants By Category		Prospects By Region		Applicants By Region		
Institution:	PeopleSoft University	Career:	Undergraduate					
Recruiter ID:	ADREC1	Name:	Chavez,John Joseph					
Select Prospects By				Sort Prospects By				
Admit Term:	<input type="text"/>	Group:	Academic	<input checked="" type="radio"/> Admit Term		<input type="button" value="Search"/>		
Category:	<input type="text"/>	Responsible:	<input type="text"/>	<input type="radio"/> Category				
				<input type="radio"/> Group				
Find View All First 1-6 of 7 Last								
ID	Name	Admit Term	Applied	Category	Group	Primary		
Carry ID	AD5211	Reiter,Eric	2001 Sprng	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>	Prospect Program
Carry ID	AD5213	Rice,Lisa	2001 Sum	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input checked="" type="checkbox"/>	Prospect Program
Carry ID	AD5201	Berry,Kim	2001 Sum	<input type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>	Prospect Program
Carry ID	AD5221	Yost,Linda	2001 Sum	<input type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>	Prospect Program
Carry ID	AD5205	Howe,Craig	2001 Fall	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>	Prospect Program
Carry ID	AD5207	Hume,Janice	2001 Fall	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input checked="" type="checkbox"/>	Prospect Program

Field or Control	Description
Select Prospects By	Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.
Admit Term	Enter an admit term to view prospects for a specific term.
Category	<p>Enter a recruiting category to narrow which prospects you want to see. Leave this field blank to view all prospects that are assigned to this recruiter, regardless of category.</p> <hr/> <p>Note: You cannot search on <i>REGN</i> on this page. To search on region, access the Prospects by Region page.</p> <hr/>
Group	Select a recruitment group to search for a broader recruiting group.
Responsible	Select a value to view only prospects for whom this recruiter is the primary recruiter. You can also view only those prospects for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all prospects, regardless of the recruiter's responsibility role.
Admit Term, Category, and Group	Select an option to view prospects by admit term, category or group.
Search	Click this button to view prospects that match your search criteria.

Field or Control	Description
Carry ID	Click this button to carry forward this person's ID to other pages that you access.
Prospect Program	Click this link to access the Prospect Programs page and view a list of programs for a prospect.

Viewing Applicants Assigned to a Specific Recruiter by Category

Access the Applicants by Category page (**Student Recruiting >Student Recruiters >Summaries >Recruiter Summary >Applicants by Category**).

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

Prospects By Category		Applicants By Category		Prospects By Region		Applicants By Region																																																							
Institution:	PeopleSoft University	Career:	Undergraduate	Recruiter ID:	ADREC1	Name:	Chavez,John Joseph																																																						
Select Applicants By				Sort Applicants By																																																									
Admit Term:	<input type="text"/>	Group:	Academic	<input type="radio"/> Category	<input type="button" value="Search"/>																																																								
Acad Prog:	<input type="text"/>	Status:	<input type="text"/>	<input type="radio"/> Group																																																									
Category:	<input type="text"/>	Responsible:	<input type="text"/>																																																										
<div>Find View All First 1-5 of 5 Last</div> <table border="1"> <thead> <tr> <th></th> <th>ID</th> <th>Name</th> <th>Appl Nbr</th> <th>Admit Type</th> <th>Category</th> <th>Group</th> <th>Primary</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Carry ID"/></td> <td>AD5205</td> <td>Howe,Craig</td> <td>00022817</td> <td>Transfer</td> <td>Honors Stu</td> <td>Academic</td> <td><input checked="" type="checkbox"/></td> <td>Program Detail</td> </tr> <tr> <td><input type="button" value="Carry ID"/></td> <td>AD5207</td> <td>Hume,Janice</td> <td>00022818</td> <td>Transfer</td> <td>Honors Stu</td> <td>Academic</td> <td><input checked="" type="checkbox"/></td> <td>Program Detail</td> </tr> <tr> <td><input type="button" value="Carry ID"/></td> <td>AD5211</td> <td>Reiter,Eric</td> <td>00022821</td> <td>First-Year</td> <td>Honors Stu</td> <td>Academic</td> <td><input checked="" type="checkbox"/></td> <td>Program Detail</td> </tr> <tr> <td><input type="button" value="Carry ID"/></td> <td>AD5213</td> <td>Rice,Lisa</td> <td>00022823</td> <td>First-Year</td> <td>Honors Stu</td> <td>Academic</td> <td><input checked="" type="checkbox"/></td> <td>Program Detail</td> </tr> <tr> <td><input type="button" value="Carry ID"/></td> <td>AD5217</td> <td>Schadt,Randle</td> <td>00022826</td> <td>First-Year</td> <td>Honors Stu</td> <td>Academic</td> <td><input type="checkbox"/></td> <td>Program Detail</td> </tr> </tbody> </table>									ID	Name	Appl Nbr	Admit Type	Category	Group	Primary		<input type="button" value="Carry ID"/>	AD5205	Howe,Craig	00022817	Transfer	Honors Stu	Academic	<input checked="" type="checkbox"/>	Program Detail	<input type="button" value="Carry ID"/>	AD5207	Hume,Janice	00022818	Transfer	Honors Stu	Academic	<input checked="" type="checkbox"/>	Program Detail	<input type="button" value="Carry ID"/>	AD5211	Reiter,Eric	00022821	First-Year	Honors Stu	Academic	<input checked="" type="checkbox"/>	Program Detail	<input type="button" value="Carry ID"/>	AD5213	Rice,Lisa	00022823	First-Year	Honors Stu	Academic	<input checked="" type="checkbox"/>	Program Detail	<input type="button" value="Carry ID"/>	AD5217	Schadt,Randle	00022826	First-Year	Honors Stu	Academic	<input type="checkbox"/>	Program Detail
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Field or Control	Description
Select Applicants By	Enter the appropriate values that designate which applicants you want to see. You must complete at least one field as search criteria.
Admit Term	Enter an admit term to view applicants for a specific term.
Acad Program (academic program)	Enter an academic program to specify a particular program.
Category	<p>Enter a recruiting category to narrow the list of applicants you want to see. Leave this field blank if you want all applicants that are assigned to this recruiter, regardless of category.</p> <hr/> <p>Note: You cannot search on <i>REGN</i> on this page. To search on region, access the Applicants by Region.</p>

Field or Control	Description
Group	Select a recruitment group to search for a broader recruiting group.
Status	To view only applicants with a certain program status, select a value in the status field.
Responsible	Select a value to view only those applicants for whom this recruiter is the primary recruiter. You can also view only those applicants for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all applicants, regardless of the recruiter's responsibility role.
Admit Term, Category, Group, and Status	Select an option to view applicants by admit term, category, group, or status.
Search	Click this button to view the applicants that match your search criteria.
Carry ID	Click this button to carry forward this person's ID to other pages that you access.
Program Detail	Click this link to access the Program Summary page and view a list of programs for an applicant.

Viewing Prospects Assigned to a Specific Recruiter by Region

Access the Prospects by Region page (**Student Recruiting >Student Recruiters >Summaries >Recruiter Summary >Prospects by Region**).

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

Prospects By Category
Applicants By Category
Prospects By Region
Applicants By Region

Institution: PeopleSoft University
Career: Undergraduate
Recruiter ID: ADREC1
Name: Chavez,John Joseph

Select Prospects By
Admit Term:
Region:
Last School Attended:
Responsible:

Sort Prospects By
☒ Admit Term
☐ Lst School
☐ Region
Search

	ID	Name	Admit Term	Applied	Region	Last School Attended	Primary
Carry ID	AD5200	Bish,Jane	2001 Sprng	<input checked="" type="checkbox"/>	AZ	Ironwood	<input checked="" type="checkbox"/> Prospect Program
Carry ID	AD5212	Reyes,Tony	2001 Sprng	<input checked="" type="checkbox"/>	AZ	Ironwood	<input checked="" type="checkbox"/> Prospect Program
Carry ID	AD5216	Sawyer,Harold	2001 Sum	<input checked="" type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/> Prospect Program
Carry ID	AD5204	Artz,Larry	2001 Sum	<input checked="" type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/> Prospect Program
Carry ID	AD5210	Loomis,Doris	2001 Fall	<input type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/> Prospect Program
Carry ID	AD5220	Wright,Martha	2001 Fall	<input checked="" type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/> Prospect Program

Field or Control	Description
Select Prospects By	Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.
Admit Term	Enter an admit term to prospects for a specific term.
Region	Enter a region to limit the list of prospects. Leave this field blank to view all prospects that are assigned to this recruiter, regardless of region.
Last School Attended	Enter a value to search for prospects by the last school that they attended.
Responsible	Select a value to view only those prospects for whom this recruiter is the primary recruiter. You can also view only those prospects for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all prospects, regardless of the recruiter's responsibility role.
Admit Term, Lst School (last school attended), and Region	Select an option to view prospects by admit term, last school attended, or region.
Search	Click this button to view the prospects that match your search criteria.
Carry ID	Click this button to carry forward this person's ID to other pages that you access.

Field or Control	Description
Prospect Program	Click this link to access the Prospect Programs page and view details about the program or programs that are related to a prospect's academic career.

Viewing Applicants Assigned to a Specific Recruiter by Region

Access the Applicants by Region page (**Student Recruiting >Student Recruiters >Summaries >Recruiter Summary >Applicants By Region**).

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

Prospects By Category
Applicants By Category
Prospects By Region
Applicants By Region

Institution: PeopleSoft University
Career: Undergraduate
Recruiter ID: ADREC1
Name: Chavez,John Joseph

Select Applicants By

Admit Term:
Acad Prog:
Responsible:
Last School Attended:
Region: AZ
Status:

Sort Applicants By

☐ Last School
☐ Region
Search

Find | View All
First 1-4 of 4 Last

	ID	Name	Appl Nbr	Admit Type	Region	Last School Attended	Primary
Carry ID	AD5200	Bish,Jane	00022813	First-Year	AZ	Ironwood	<input checked="" type="checkbox"/> Program Detail
Carry ID	AD5204	Artz,Larry	00022816	Transfer	AZ	Apache	<input type="checkbox"/> Program Detail
Carry ID	AD5212	Reyes,Tony	00022822	Transfer	AZ	Ironwood	<input type="checkbox"/> Program Detail
Carry ID	AD5220	Wright,Martha	00022828	First-Year	AZ	Apache	<input type="checkbox"/> Program Detail

Field or Control	Description
Select Applicants By	Enter the appropriate values that designate which applicants you want to view. You must complete at least one field as search criteria.
Admit Term	Enter an admit term to view applicants for a specific term.
Region	Enter a region to limit the list of applicants. Leave this field blank to view all applicants that are assigned to this recruiter, regardless of region.
Acad Prog (academic program)	Enter an academic program to specify a particular academic program.
Status	Status an application status to view applicants with a particular status.

Field or Control	Description
Responsible	Select a value to view only those applicants for whom this recruiter is the primary recruiter. You can also view only those applicants for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all applicants, regardless of the recruiter's responsibility role.
Last School Attended	Enter a value to search for applicants by the last school that they attended.
Admit Term, Lst School (last school attended), and Region	Select an option to view applicants by admit term, last school attended, or region.
Search	Click this button to view the applicants that match your search criteria.
Carry ID	Click this button to carry forward this person's ID to other pages that you access.
Program Detail	Click this link to access the Program Summary page and view a list of the programs for an applicant.

Adding and Updating Applications

Adding New Applications Manually

If the applicants you are adding do not already exist in your database, the system creates them and assigns them identification numbers.

The Biographic Details, Regional, and Personal pages store information regarding the applicant as a *person*. This data is shared between all applications for an applicant as well as with prospect personal data. When you use this component to update biographical data, the whole database is updated. The rest of the pages in the Add Application component are application-specific pages, meaning they store information unique to this *application*. In other words, applications share biographical data but application data is unique to each application.

Avoid entering duplicate applications. Use the Installation Defaults - AD page to specify at what level you want the system to warn you that a potential duplicate application exists. For information, see [Setting Up Admission Installation Defaults](#).

The Student Admissions–Add Application component is the second of three very similar components:

- Student Recruiting , Create/Update Prospects component.
- Student Admissions, Add an Application component.
- Student Admissions, Maintain Applications component.

Create/Update Prospect and Add an Application have Biographical Data, Regional, and Personal pages. All three components have other pages with similar names such as Prospect Program Data and Application Program Data. Use these components to enter or maintain similar information at different times during your business processes, such as entering prospects, entering application data, and maintaining application data.

This section lists prerequisites and discusses how to:

- Enter or update applicant biographical data.
- Enter or update applicant regional data.
- Enter or update personal information
- Enter application program data.
- Enter or update additional information.
- Update or add application regional data.
- Use the Calculate Deposit Fees page.
- Enter application data.

- Use the Application Fees page.
- Use the Application Items page.
- Enter recruiting information for an application.
- Enter or update applicant additional details.
- Add communications, checklists and comments for applicants.

Prerequisites

Before you begin entering application data, determine if the person is already in your Campus Solutions database. Often an applicant already has a system ID because an administrator already entered the person as a prospective student. For example, if people sent test scores to your institution, it is likely that they are already in the system.

To see if the applicant is already in your system, go to **Student Admissions > Application Entry > Search Match**.

Related Links

"Using Search/Match" (Campus Community Fundamentals)

Pages Used to Add New Applications Manually

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Biographical Details	SCC_BIO_DEMO_PERS	Student Admissions > Application Entry > Add Application > Biographical Details	Enter an applicant's biographical information.
Addresses	SCC_BIO_DEMO_ADDR	Student Admissions > Application Entry > Add Application > Addresses	Enter an applicant's address.
Regional	SCC_BIO_DEMO_REG	Student Admissions > Application Entry > Add Application > Regional	Enter region specific information, if applicable, based on country code.
Personal	SCC_PERSONAL_INFO	Student Admissions > Application Entry > Add Application > Personal	Enter biographic details separately from the rest of the person's data. This page appears if you select a field on the Biographic Fields page.

Page Name	Definition Name	Navigation	Usage
Application Program Data	ADM_APPL_PROG_ENT	Student Admissions > Application Entry > Add Application > Application Program Data	Enter program data and academic plan data pertaining to this application. You can also create an enrollment deposit and matriculate an applicant from this page. You must track applications at least at the plan level, but any lower level tracking depends on your office policies.
Additional Information	SAD_APPL_CAF_TAB	Student Admissions > Application Entry > Add Application > Additional Information	Add or update common attributes for program, plan and subplan.
Application Regional	SAD_APPL_REG_DATA	<ul style="list-style-type: none"> Student Admissions > Application Maintenance > Maintain Applications > Application Regional Student Admissions > Application Entry > Add Application > Application Regional 	Add or update country-specific data regarding the application.
Evaluation	ADM_APPL_EVAL1_SEC	Click the Evaluation link on the Application Program Data page.	Add an evaluation status for this program.
Deposit Fees	ADM_APPL_DEP_FEE	Click the Calculate Deposit Fees link on the Application Program Data page.	Calculate a deposit fee when entering a new application. You can calculate the deposit owed for enrollment and post that charge to the person's account directly from the Application Program Data page as part of adding a new application. If the application has a program status of admitted, the Calculate Deposits Fees link becomes available if a value is defined on the Application Center Table.

Page Name	Definition Name	Navigation	Usage
Deposit Fees (entry)	ADM_APPL_ENTRY2_S	Click the Calculate Deposit Fees button or the Deposit Fees link on the Deposit Fees page.	Enter deposit fees for the applicant. <hr/> Note: When this deposit posts in PeopleSoft Student Financials, the system updates the program action to matriculation if you selected the Create Student check box on the Status Update page. <hr/>
Application Data	ADM_APPL_DATA	Student Admissions > Application Entry > Add Application > Application Data	Enter additional information regarding the application and to calculate an application fee. The system stores data on this page at the <i>application</i> level, as opposed to storing it under a person or academic program. This data is relevant to all academic programs being applied to with this application.
Application Fees	APP_FEE_CALC_MSG	Click the Calculate Application Fees link on the Application Data page.	Calculate the application fee that the person owes. If fees were calculated in the AAWS on line application and a payment was sent to the GL, fees are not recalculated when you click this link.
Tender Details	ADM_APPL_TNDRCC_SP	Click the Show Tender Details link on the Application Fees page. The Tender Details page is accessible when you select the Credit Card tender category on the Application Fees page.	Enter credit card information. See "Accepting Student Payments" (Student Financials).
Tender Details	ADM_APPL_TENDER_SP	Click the Show Tender Details link on the Application Fees page. The Tender Details page displays when you select the Check or Cash tender category on the Application Fees page.	Enter check or cash information. See "Accepting Student Payments" (Student Financials).
Currency Conversion	APPL_FEE_CURR_SP	Click the Currency Detail link on the Application Fees page.	Obtain details on the currency conversion.

Page Name	Definition Name	Navigation	Usage
Application Items	ADM_APPL_ENTRY3_S	Click the Transaction Summary link on the Application Data page to view information about the application fee for this application.	Review information about the application fee for an applicant.
Tender Details	PAYMENT_TENDER_SP	Click the Show Tender Details link on the Application Items page.	View tender details.
Application School/Recruiting	ADM_APPL_RECRUIT	Student Admissions > Application Entry > Add Application > Application School/Recruiting	Enter recruiting information about an applicant.
Additional Details	SAD_PESC_OTHER_SCH	Student Admissions > Application Entry > Add Application > Additional Details	Enter and view information about previous schools the applicant has attended.

Entering or Updating Applicant Biographical Data

Access the Biographical Details page (**Student Admissions > Application Entry > Add Application > Biographical Details**).

Use this page to enter and update the known biographical and demographic data for an applicant.

If, by performing search/match, you find that the person does *not* yet have an ID in your database, the key dialog prompt says *NEW* in the ID field because you are adding a new person as well as a new application. The application number will be all zeros.

Note: Leave the **Application Number** field as all zeros in order for the auto-numbering feature to work properly.

If you find the person in your search/match and used the Carry ID option, your key dialog prompt lists that person's ID. The application number is still all zeros.

If the person exists in your database, it is a good idea to see if an application has already been entered. You do *not* want to enter a duplicate application. Go to the Maintain Applications component to determine if the person has any current applications.

If you find a matching ID during your search process, the Biographical Data page displays existing data about this person. If you do not find a matching ID during your search process, then you add a new person as well as a new application. The page is blank except for those fields populated according to your user defaults.

After running a search/match, select Student Admissions, Application Entry, Add Application to add a new application.

Entering or Updating Applicant Regional Data

Access the Regional page (**Student Admissions > Application Entry > Add Application > Regional**).

Use this page to enter biographical information specific to your installation country. If this person is already in your database and has existing information, you can view it on this page.

Entering or Updating Personal Information

Access the Personal page (**Student Admissions > Application Entry > Add Application > Personal**).

Use the Personal page to enter or update other biographic details such as gender or sexual orientation. This information is stored separately from the rest of the applicant's data. This page appears when you select at least one field from the Biographic Details page.

For more information about:

- Setting up the Personal page, see "Reviewing or Defining Installation Settings For Biographic Fields" (Campus Community Fundamentals)
- The Personal page, see "Entering Personal Information" (Campus Community Fundamentals)

Entering Application Program Data

Access the Application Program Data page (**Student Admissions > Application Entry > Add Application > Application Program Data**).

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

Biographical Details	Addresses	Regional	Application Program Data	Additional Information	Application Regional
Pamela Boyle		ADCAF0001			
Academic Institution: PeopleSoft University		Application Number: 00026463			
Academic Career: Undergraduate		Career Number: 0			
Program Data Find View All First 1 of 2 Last					
Program Number: 0		*Effective Date: 29/08/2013			
*Admit Term: 0710 2013 Fall		Effective Sequence: 2			
*Academic Program: LAU Lib Arts		Expected Graduation Term:			
*Academic Load: Full-Time		*Campus: WALCR Walnut			
<input type="checkbox"/> Joint Program Academic Shift: day shift		CAS Details			
Program Enrollment					
Cohort Tag: FALL-2011		APT Instance:			
Year of Program: 1st Year					
Program Status					
Status: Admitted		Action Date: 29/08/2013			
*Program Action: ADMT Admit		Action Reason:			
Last Updated On: 29/08/2013 10:15:24AM By: PS		Evaluation Calculate Deposit Fees			
Plan Data Find View All First 1 of 1 Last					
*Academic Plan: BIOLBS Biology (BS)		Major: BS			
Sub-Plan Data Find View All First 1 of 1 Last					
*Sub-Plan: PHOTO Photo Biology		Conc:			
Transfer To: Education		<input type="button" value="Go"/>			

Note: The system fills in most of the fields on the Application Program Data page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, the system populates some fields according to those defaults. For example, depending on your default setup, the system might populate academic career, institution, admit term, academic load, and academic program data based on the values in the matching prospect record.

Note: Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Field or Control	Description
Effective Date	Enter an effective date for the application to this academic program if different than the default date. If you are entering the application after the start date of the admit term, you need to back date the effective date to a date prior to the start date of the admit term in order to term activate the student once they are matriculated.
Admit Term	Enter the admit term in which the applicant is expected to enroll, if he or she is admitted for this application. Define admit terms on the Term Table page. This is a user default field.
Expected Graduation Term	Enter the term in which the student expects to graduate.
Academic Program	<p>Enter or update the academic program to which the person is applying. Define academic programs on the Academic Program page. This is a user default field.</p> <p>After you matriculate the applicant, the system copies the application program data to the program/plan tables in PeopleSoft Student Records.</p>
Academic Load	Select the academic load that the applicant will be taking on if admitted for this application. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Full-Time</i> and <i>Part-Time</i> .
Joint Program	Select the Joint Program check box if the applicant is applying to a joint program.
Dual Program	This field becomes available when you select the Joint Program check box. Enter the joint academic program. Define dual programs on the Academic Program page.
Campus	Enter or update the campus to which the person is applying within your academic institution. Define campuses on the Campus Table page. This is a user default field.

Field or Control	Description
Academic Shift	<p>Indicates the attendance pattern under which an applicant has applied and is being considered for admission. The field appears if the Use Shift check box is selected on the Academic Institution 3 page.</p> <p>If only the Use Shift check box is selected, the Academic Shift field is optional and the values available here are those defined on the Academic Shift page.</p> <p>If the Use Shift by Admit Term check box is also selected on the Academic Institution 3 page, then the values available here are those defined on the Academic Shift page and then mapped to an admit term on the Academic Shift Mapping page. If a match is found, you must select a value for the Academic Shift field.</p> <p>See "Setting Additional Institution Defaults and Options" (Campus Solutions Application Fundamentals)</p> <p>See "Defining Academic Shifts" (Campus Solutions Application Fundamentals)</p> <p>See Mapping Academic Shifts to Admit Terms</p>
Status	Because you are entering a new application, this field automatically displays <i>Applicant</i> .
Program Action	Because you are entering a new application, this field automatically displays <i>Application</i> . This value can be changed. Program actions are predefined on the Admissions Action Table page and should not be modified.
Action Date	The default for the action date is your system date. This is the date that the action was actually entered into the system (contrast this with the effective date).
Action Reason	<p>If there are action reasons associated with the program action that you selected, you can select the appropriate reason value. Action reasons enable you to record a brief explanation of why the program action took place. For example, for the action <i>WADM (Administrative Withdrawal)</i>, you could define a reason of <i>Incomplete Application</i>. Define action reasons on the Program Action Reason Table page.</p>
Last Updated On and By	The date on which the page was last updated and the name of the person who last updated the page.

Field or Control	Description
Career Number	Available if the Program Action field contains the value <i>Readmit Application</i> . If you want to readmit this applicant for this application into an existing career, you can select the proper career number here. You must also have an admit type where the Readmit Processing Required check box has been selected on the Admit Type Table page. The system readmits the person into the career that corresponds to the career number that you select.
Academic Plan	Enter the academic plan within the academic program being applied to with this application. An academic plan can be any area of study, such as English, math minor, physics, or undeclared. Define academic plans on the Academic Plan Table page. This is a user default field.
Sub-Plan	If a subplan exists for the academic plan, enter the subplan here. Define academic subplans on the Academic Sub-Plan Table page. This is a user default field.
Calculate Deposit Fees	<p>Click this link to calculate an enrollment deposit. The Calculate Deposit Fees Page appears.</p> <p>If your application center has designated a deposit fee code that requires a deposit, and you enter a program status of <i>Admit</i>, the Calculate Deposit Fees link appears. You can not exit the component until you calculate the enrollment deposit. Application centers are designated on the Application Data page.</p>
Evaluation	Select this link to enter the status of the application. Values for this field are defined on the Evaluation Status Table.

Field or Control	Description
Create Program	<p>To matriculate the applicant at the same time you are entering the new application, select <i>Matriculation</i> in the Program Action field. The Create Program button becomes available.</p> <p>Click the Create Program button to save the component.</p> <p>Also, note that if you select <i>Matriculation</i> in the Program Action field, you are <i>required</i> to click the Create Program button (which, again, saves the component) before exiting the component.</p> <p>After you matriculate a person, the system creates a record in Student Records. All fields on this page are unavailable because to access the information you need access to pages in Student Records. Therefore, if you must make a change to this person's record after matriculation, you must do so through Student Records.</p> <p>The Recruiting and Admissions application enables you to record multiple academic programs for one application under an academic career. After you have saved the Application Entry component, however, you must use the Program Addition page to add an additional program. Note that the Prog Number field shows the number of the program in the order it was entered. For example, if you only have one program, it displays <i>0</i>. The next program displays <i>1</i>.</p> <hr/> <p>Note: Since each application number tracks to one set of application data, including an Application Center, Oracle does not recommend the use of multiple admit terms and multiple programs for a single application number.</p> <hr/> <p>Before matriculating the applicant, you might want to move to the next page in the Application Entry component first to record additional information about the applicant before you perform the matriculation process.</p>
Go	Click this button to go to another component.

Program Enrollment

This group box appears only if the Enable Program Enrollment check box is selected on the Academic Institution 9 page.

See "Enabling Program Enrollment and Activity Management Defaults" (Campus Solutions Application Fundamentals)

For information about Program Enrollment, refer to the Student Records - Program Enrollment documentation.

See "Understanding Program Enrollment" (Student Records)

Entering or Updating Additional Information

Access the Additional Information page (**Student Admissions > Application Entry > Add Application > Additional Information**).

This example illustrates the fields and controls on the Additional Information page (1 of 2).

Biographical Details		Addresses		Regional		Application Program Data		Additional Information		Application Regional	
Pamela Boyle				ADCAF0001							
Academic Institution:		PeopleSoft University		Application Number:		00026463					
Academic Career:		Undergraduate		Student Career Nbr:		0					
Program Data Find View All First 1 of 1 Last											
Program Number: 0				Effective Date: 03/09/2013							
Academic Program:		LAU Lib Arts		Effective Sequence:		1					
Program Attributes Find First 1-3 of 3 Last											
Attribute TRFNumber 1 <input checked="" type="checkbox"/> Show in Student SS											
Attribute Student Language AR Arabic <input checked="" type="checkbox"/> Show in Student SS											
Attribute Rank on Wait List 10 <input checked="" type="checkbox"/> Show in Student SS											

This example illustrates the fields and controls on the Additional Information page (2 of 2).

Plan Data		Find		View All		First		1 of 1		Last	
Academic Plan:		BIOLBS		Biology (BS)		Major		BS			
Plan Attributes Find First 1-2 of 2 Last											
Attribute Class Rank 12 <input checked="" type="checkbox"/> Show in Student SS											
Attribute Student Language DA Danish <input checked="" type="checkbox"/> Show in Student SS											
Sub-Plan Data Find View All First 1 of 1 Last											
Sub-Plan:		PHOTO		Photo Biology		Conc					
Attributes											

The Common Attribute Framework allows you to associate attributes with a functional area by a Record Context (Set UP SACR, Common Definitions, Common Attributes Setup, Record Context).

Define attributes on the Common Attribute page (Set Up SACR, Common Definitions, Common Attributes Setup, Common Attribute).

See "Understanding Common Attribute Framework" (Campus Community Fundamentals)

The following Record Contexts are delivered:

- ADM_APPL_PROG (Attribute Record: SAD_PROG_CAF)
- ADM_APPL_PLAN (Attribute Record: SAD_PLAN_CAF)
- ADM_APPL_SUBPLAN (Attribute Record: SAD_SUBPLAN_CAF)

The Additional Information page is available only if you associate at least one attribute with one of the record contexts.

If no sub-plan data exists, the Sub-Plan Data section of the Additional Information page does not appear. If the section does appear, an Attributes link opens a subpage where you can enter/view sub-plan attributes.

Defining Attributes for the Admissions/Student Records Program Stack

The Record Context allows you to set certain properties for a particular attribute in that context, including whether an attribute is repeatable or required.

Note: When an attribute is set to required, then *from that point forward*, a value must be entered to save the component. If a user inserts a new effective dated row (or makes a change in correction mode) to records which pre-date the implementation of the Common Attribute Framework attribute, *the user must enter a value on the current row as well as any historical or future dated rows in order to save the component. For this reason, we strongly recommend that careful consideration be given when determining whether an attribute should be required.*

Additionally if the required attribute is to be used in a web service, a value must be present in the request XML in order for the service to perform without error. For example, if an attribute field is defined as required on the ADM_APPL_PROG Record Context, then in AAWS that field would need to be required in the User Interface to collect a value allowing the SAD_SUBMITAPPL operation to complete successfully.

See [Understanding AAWS](#)

For further information about how to set attributes to required or repeatable, refer to the Campus Community – Common Attribute Framework documentation.

See "Understanding Common Attribute Framework" (Campus Community Fundamentals)

If the attributes set up for Admissions also exist on the Student Program/Plan stack, the values carry over during the Matriculation process.

See "Maintaining Student Additional Information" (Student Records)

Updating or Adding Application Regional Data

Access the Application Regional page (**Student Admissions > Application Entry > Add Application > Application Regional**).

This example illustrates the fields and controls on the Application Regional page: Australia. You can find definitions for the fields and controls later on this page.

Application Regional		Application Data	Application School/Recruiting	Application Student Response
Damien Crowther		ADAU8005		
Academic Institution:	PeopleSoft Australia Uni			
Academic Career:	Undergraduate		Application Number:	00024433
▼ Australia				
Program Data Find View All First ◀ 1 of 1 ▶ Last				
Program Number:	0		Effective Date:	08/03/2009
Admit Term:	0629 2009 Sem2		Effective Sequence:	1
Academic Program:	BENG BEng			
*Mode of Attendance:	Internal Mode of Attendance ▼			
Cohort:	0900 🔍 2009 Commencing			
Funding Source:	CSP 🔍 Commonwealth Supported Place			

This example illustrates the fields and controls on the Application Regional page: New Zealand. You can find definitions for the fields and controls later on this page.

▼ New Zealand				
Program Data Find View All First ◀ 1 of 1 ▶ Last				
Program Number:	0		Effective Date:	06/27/2006
Admit Term:	0505 2003 Fall		Effective Sequence:	1
Academic Program:	LAU Lib Arts			
*Funding Source:	Full Fee Domestic Student ▼			

This example illustrates the fields and controls on the Application Regional page: Netherlands (1 of 2). You can find definitions for the fields and controls later on this page.

Biographical Details	Addresses	Regional	Application Program Data	Application Regional	Application Data
Bartholomeus Schoonhoven		ADNLD005			
Academic Institution: PeopleSoft University - NLD					
Academic Career: Bachelor (NLD)		Application Number: 00024453			
▼ Netherlands					
Program Data Find View All First 1 of 1 Last					
Program Number: 0		Effective Date: 08/20/2008			
Admit Term: 2090 2009		Effective Sequence: 1			
Academic Program: H010 BussEcon					
Program Information					
BRINcode: NL02 NLD Brincode 02		Start Month: 9			
Program Code: 04401 Business Economics		Start Occasion:			
Academic Year: 2009					
Sub Institute: 01 Main					
Higher Education Additional Information					
Studieline Status: Enrollment Requested		<input type="checkbox"/> Message 310			
Admission Verification					
Deficiency Status: Not yet determined		Transmit		Last Transmit Date	
Prof Requirements Status: Not Applicable		<input type="checkbox"/> Message 31K			
Professional Duties Status: Not applicable		<input type="checkbox"/> Message 31P			
Language Test Status: Not applicable		<input type="checkbox"/> Message 31I			
Approval Higher Year: False		<input type="checkbox"/> Message 31J			
		<input type="checkbox"/> Message 31H			
Student Prior Education		Student Data Higher Education		Student Messages	

This example illustrates the fields and controls on the Application Regional page: Netherlands (2 of 2). You can find definitions for the fields and controls later on this page.

Payment Information	
Payment Indicator:	<input type="text"/>
Payment Amount:	<input type="text"/>
Studielink Form of Payment:	<input type="text"/>
Paid by:	<input type="text"/>
	<input type="checkbox"/> Request Payment Terms
Paid at Brincode:	<input type="text"/>
Paid at Institution Name:	<input type="text"/>
Barcode:	<input type="text"/>
Order Number:	<input type="text"/> Student Bank Accounts
<input type="checkbox"/> Message 19	
<input type="checkbox"/> Message 20	
Lot Drawing	
Lot Drawing Type:	<input type="text"/>
<input type="checkbox"/> Message 31N	
Additional Information	
Form of Study:	<input type="text"/>
Academic Level:	<input type="text"/>
<input checked="" type="checkbox"/> Funding Applies	
Prior Education	
Find View All First 1 of 1 Last	
Prior Education:	<input type="text"/>
Cluster Detail Code:	<input type="text"/>

You can add or update country-specific application data on this page. The page and the appropriate data appear based on the country options that you select on the following pages:

- (AUS, NLD, NZL) Academic Institution Table, Academic Institution 6 page.
- (NLD) Student Admin Installation, SA Features page.

(AUS) Australia and (NZL) New Zealand Functionality

Field or Control	Description
(AUS) Mode of Attendance	<p>The Mode of Attendance field is a required field that is populated on each student's application. This data is required for reporting admissions data to the TACs via the Enrollment Feedback process as well as reporting element 329 Mode of Attendance code in DEEWR Data Collections.</p> <p>The Mode of Attendance field resides on Application Entry, Application Maintenance, and Program Addition pages. It is a required field when you enter an application. After the student is matriculated, the mode of attendance is carried forward to the student program.</p>

Field or Control	Description
(AUS) Cohort	(Optional) Select a cohort for the student that the system will use as the default value when you enroll the student. The system populates this value by default on the Australian regional enrollment data and the field is available to tuition calculation for HECS or tuition fees if the Australian Regional Installation Settings are selected. After the student is matriculated, the cohort is carried forward to the student program.
(AUS) Funding Source	(Optional) Select a funding source for the applicant to represent the type of place being offered. The funding source can be mapped to the code reportable as element 724 in the DEEWR Applications & Offers Collection. See "Generating the Applications and Offers Files" (Student Records).
(NZL) Funding Source	This field is populated at application data entry time and is used in the Single Data Return process. The system uses the funding source that you enter as a default on the enrollment record for the student.

(NLD) Netherlands Functionality

Field or Control	Description
Form of Study	Enter the form of study for which the applicant is registering.
Academic Level	The academic level can be registered separately from the academic program record.
Funding Applies	Select this option to indicate whether funding applies.
Prior Education	Before a student can enroll in a program, the student has to meet certain requirements concerning his or her curriculum. One of these requirements is the fact that the student has obtained a diploma from their previous school. The diploma received will reflect a specific level of education. Individual exam results are relevant. On a student level all prior education, including information about the school(s), courses taken and subjects passed, have to be registered.

For more information about fields in the Admission Verification, Payment Information, and Lot Drawing group boxes, refer to the “Reviewing Admissions Information, Reviewing Other Application Information” section in the following topic:

Understanding Studielink

Note: To make changes to this page after it has been saved, you must do so through the Maintain Applications component. If you are only entering one program for the applicant, enter only one program action on the Application Program Data page. You must enter additional program actions through the Maintain Applications component. For example, suppose you enter the application initially with a program action of *APPL* in the Add Application component. When you admit the applicant, you would enter the program action of *Admit* in the Maintain Applications component.

Using the Calculate Deposit Fees Page

Access the Calculate Deposit Fees page (Click the **Calculate Deposit Fees** link on the Application Program Data page).

Field or Control	Description
Calculate Deposit Fees	Click this button to access the Deposit Fees page where you can calculate an enrollment deposit fee.
Deposit Fees	Click this link to access the Deposit Fees page where you can view details about a person's enrollment deposit.
Deposit Calc Messages (deposit calculation messages)	Click this link to view messages that occur while attempting to calculate deposit fees. This link becomes available when the system generates a message.

Entering Application Data

Access the Application Data page (**Student Admissions > Application Entry > Add Application > Application Data**).

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

Application Regional | **Application Data** | Application School/Recruiting | Application Student Response | Additional Details

Pamela Boyle ADCAF0001

Academic Institution: PeopleSoft University

Academic Career: Undergraduate Application Number: 00026463

Application Data

*Application Center: UGRD Undergrad *Admit Type: FYR First-Year

*Application Date: 29/08/2013 Academic Level: Freshman

*Created On: 29/08/2013 *Notification Plan: Regular

☐ Prior Application Application Method:

☐ Previous Attendance From Date:

☐ Graduated early? To Date:

☐ Not Currently Attending School [Additional Fields](#)

☐ Electronic Signature

☐ Criminal Conviction

Additional Information

Housing Interest: On Campus ☐ Financial Aid Interest

File Information **Application Fee Information**

Complete: ☐ Date: External Application Nbr: Status: Pending [Calculate Application Fees](#)

Fee Type: Standard [Transaction Summary](#)

[Display Errors / Warnings](#)

File Attachments Personalize | Find | View All | First 1 of 1 Last

Attachments | Audit

Attached File	View	Add Attachment
	View	Add Attachment

Transfer To: Education

Note: The system populates most of the fields on this page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, the system populates some fields according to those defaults.

Field or Control	Description
Application Center	Enter the application center that will process this application. This information helps you track which office is managing specific applications. Define application centers on the Application Center Table page. This is a user default field.
Admit Type	Enter the admit type for this application (for example, <i>First-Year</i> or <i>Transfer</i>). Define admit types on the Admit Type Table page. This is a user default field.
Application Date	The default for the application date is the system date that the application was received. You can override this default.

Field or Control	Description
Academic Level	Select the academic level to which the applicant is applying for admission. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Freshman</i> , <i>Graduate</i> , <i>Junior</i> , <i>Not Set</i> , and <i>Post-Baccalaureate</i> . This is a user default field.
Created On	The default for the created date is the system date on which you create this application record.
Notification Plan	Specify whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Early Admit</i> , <i>Regular</i> , and <i>Rolling</i> .
Prior Application	Select this check box if this applicant previously applied to this career. This selection is useful for informational and reporting purposes.
Application Method	Select a value to indicate how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Application Service</i> , <i>Diskette</i> , <i>Hard Copy</i> , <i>Web Application</i> , <i>EDI</i> , and <i>OUAC</i> . This is a user default field.
Previous Attendance	Select this check box if the applicant previously attended the institution.
From Date and To Date	If the Previous Attendance check box is selected, enter the dates from which and to which the applicant previously attended the institution.
Graduated early?	Select this check box if the applicant graduated early from the institution.
Not Currently Attending School	Select this check box if the applicant is not currently attending school.
Electronic Signature	Indicates that the applicant has submitted an electronic signature.
Criminal Conviction	Select this check box if the applicant has a criminal conviction.

Field or Control	Description
Additional Fields	<p>This link is available only if at least one attribute is associated with the delivered record context ADM_APPL_DATA (Attribute Record: SAD_APPL_CAF).</p> <p>Refer to the documentation about the Additional Information page.</p>
Housing Interest	<p>Enter any housing interest indicated by the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i>, <i>Commuter</i>, <i>Off Campus</i>, and <i>On Campus</i>. This is a user default field.</p>
Financial Aid Interest	<p>Select this check box if this applicant is interested in financial aid for the programs to which he or she is applying. This field is useful for informational and reporting purposes. For example, the financial aid office can run reports listing those applicants interested in financial aid. This is a user default field.</p>
Complete	<p>Select this check box if this application is not missing any information and is considered complete by your office.</p>
Date	<p>Enter the date that you marked this application as complete.</p>
External Application Nbr (external application number)	<p>Enter the external application number if you received this application from a service with its own application-numbering scheme.</p>
Fee Type	<p>Select the type of fee assigned to this application. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i>, <i>International</i>, and <i>Standard</i>. These fee types enable you to charge varying user-defined application fees.</p>

Field or Control	Description
Calculate Application Fees	<p>You can use the Application Fees Calculation process to calculate application fees based on the Application Fee Code structure which is attached to the Application Center. The fee is calculated based on core production data—application program data. Application fees may or may not be posted to the student account. An administrator can waive the fee. The waiver is associated with an item type defined on the Application Fee Code setup. Both the application fee and waiver are posted to the student account.</p> <p>If you calculate application fees based on core production data, then after selecting the fee type, click the Calculate Application Fees link to calculate the application fee owed. The Application Fees Calculation process runs and the Application Fees page appears. The system displays the calculated fee amount.</p> <p>When you return to the Application Data page, the Status field in the Application Fee Information group box displays <i>Calculated</i>.</p> <p>If your application fee is set up to post to PeopleSoft Student Financials, the Application Fees calculation process runs when you click the Run button on the Application Fees page. A COBOL posting program runs which creates an account for this person in PeopleSoft Student Financials.</p> <p>If you use the Admission Applications Web Services (AAWS), fee calculation does not rely on Admissions production data. If a fee is required, <i>fee calculation occurs during the application submit process via the web service</i>, using the data stored in the AAWS staging table. With the exception of the maximum amounts on the Minimum/Maximum Fee Code (which rely on the charges posted to the student account), the AAWS fee calculation process produces the same amounts as the production data Application Fee Calculation process.</p> <hr/> <p>Note: Application fees and payments are <i>not</i> posted to the student account for AAWS. Regardless of any setup in the Application Fees component, all AAWS transactions are posted to the general ledger using the Direct to GL process.</p> <hr/> <p>For AAWS application fee processing, if Yes is selected for the Application Fee Required field on the Application Center Table page <i>and</i> the Amount Sent to GL value is greater than zero, then when you click the Calculate Application Fees link, the fee is not recalculated. The link takes you to the Application Fees page where you can view the results of AAWS application fee and waiver processing.</p> <p>See Setting Up Application Processing Centers.</p> <p>See Reviewing and Editing Staged Admission Application Transactions</p> <p>See Payment Integration Web Service Operations</p> <p>See "Setting Up Application Fees" (Student Financials).</p>

Field or Control	Description
	See "Generating Direct to GL Entries" (Student Financials).
Status	For AAWS fee and waiver processing, the value in this field is updated based on staging table data for SAD_APL_DAT_STG.APP_FEE_STATUS.
Transaction Summary	Click this link to view information about the application fee for this application. The Application Items Page appears.
Display Errors/Warnings	If any errors occurred during the calculation, click this link to view error details.
Go	Click this button to go to another component.

Note: After this page has been saved, you make changes to this application in the Application Maintenance component.

File Attachments

Use this group box to add, delete and view attachments for an admissions application.

Field or Control	Description
Add	Click to access standard PeopleTools functionality to browse to a file and upload it
View	Click the link to open the attachment in a new window.

The Audit tab displays all updates to attachments, including user name and date/time.

Using the Application Fees Page

Access the Application Fees page (Click the **Calculate Application Fees** link on the Application Data page).

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

Application Data

Application Fees

Fee Amount: 20.00 USD

Fee Paid: 20.00 USD

Date: 11/23/2010

*Fee Status: Received

Waive Amount: USD

Waiver Basis Code:

Find | View All First 1-3 of 3 Last

*Tender Category	Tender Amount	*Currency		
Credit Card	20.00	USD	Show Tender Details	Currency Detail
Cash		USD	Show Tender Details	Currency Detail
Electronic Check		USD	Show Tender Details	Currency Detail

Note: You cannot authorize/capture credit card or electronic check payments through Admissions Application Fee Payment.
To adhere to PCI compliance regulations, you should not store credit card numbers in your database.

Field or Control	Description
Date	The default for this date is your system date. Edit this field to reflect the date the application fee was entered or waived.
Fee Status	<p>Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Deferred</i>, <i>Pending</i>, <i>Received</i>, <i>Waived</i>, and <i>Waiver</i>.</p> <p>If you calculate fees from production data, using the Application Fee Calculation process, select a status for this application fee. If you are receiving the application fee, change the status of the fee to <i>Received</i>. After you change the status to <i>Received</i>, the fields in the lower section of the page become available.</p> <p>For information about how to use this page for AAWS application fee and waiver processing:</p> <p>See Reviewing and Editing Staged Admission Application Transactions</p>
Waive Amount	<p>Enter the amount of the application fee that will be waived, if appropriate.</p> <p>For AAWS, if manual reconciliation is required, you enter the waive amount in the Application Data staging page and it appears here after the data is posted.</p>

Field or Control	Description
Waiver Basis Code	<p>The field is available for edit only if the value in the Fee Status field is <i>Waived</i> or <i>Waiver</i>.</p> <p>For information about how this field is populated by AAWS fee processing:</p> <p>See Reviewing and Editing Staged Admission Application Transactions</p>
Tender Category	<p>Use this field to designate how the fee payment was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Credit Card</i>, <i>Electronic Check</i>, <i>Check</i>, or <i>Cash</i>.</p> <p>You have the flexibility to receive payments in multiple tenders. For example, you can waive a portion of a fee and the student's remaining payment can be split between a credit card and a check.</p> <p>If you enter <i>Credit Card</i>, <i>Electronic Check</i>, or <i>Check</i>, the Tender Details page appears so you can enter further information.</p> <p>If you do not use AAWS fee processing, you can enter information about the echeck or credit card, although the authorize/settle must be completed outside of Campus Solutions.</p> <p>Hosted payment authorize/settle functionality is available only through AAWS fee processing.</p> <p>For AAWS fee processing, if payment is required at the time of the application, the value that appears here is carried through on posting from the Application Transactions staging component. You enter a value here only if the applicant is allowed to pay later or if the waiver request was denied in the Application Maintenance component and payment was received later.</p> <hr/> <p>Note: For AAWS, partial payment is not allowed and applicants cannot split payments between credit card and check.</p> <hr/>
Tender Amount	<p>After entering a form of payment, enter the amount tendered.</p> <p>For information about AAWS fee processing, refer to the previous documentation about the Tender Category field.</p>
Currency	<p>Enter the type of currency, such as <i>USD</i> (US Dollars).</p> <p>For information about AAWS fee processing, refer to the previous documentation about the Tender Category field.</p>
Currency Conversion Details	<p>Click this link to obtain details on the currency conversion. The Currency Conversion Page appears.</p>



Field or Control	Description
Show Tender Details	Click this link to view details about the application fee. The Tender Details page appears.

Using the Application Items Page

Access the Application Items page (Click the **Transaction Summary** link on the Application Data page).

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

Application Data			
Application Items			
ID:	0162	Application Number:	00024824
Application Fee Date:	11/23/2010	Fee Amount:	20.00 USD
Status:	Received	Fee Paid:	20.00 USD
Waiver Basis Code:		Amount Sent to GL:	20.00 USD

Customize Find View All   First 1 of 1 Last			
Item Description	Account Number	Short Description	Amount
			0.00

Use the Application Items page to view the results of application fee processing. Application fees are processed using production data or, for AAWS, via the web service, using staging data.

The **Amount Sent to GL** field applies to AAWS fee processing and is populated based on the value in the related field in the Application Transactions staging component.

Set up waiver basis codes on the Application Fee Waiver Basis page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Fee Waiver Basis).

Note: To view a summary of a person's financial account, access the Customer Accounts page in PeopleSoft Student Financial.

See [Reviewing and Editing Staged Admission Application Transactions](#)

See [Setting Up Application Processing Centers](#).

See "Generating Direct to GL Entries" (Student Financials).

Entering Recruiting Information for an Application

Access the Application School/Recruiting page (**Student Admissions > Application Entry > Add Application > Application School/Recruiting**).

This example illustrates the fields and controls on the Application School/Recruiting page. You can find definitions for the fields and controls later on this page.

Biographical Details		Regional		Application Program Data		Application Data		Application School/Recruiting	
Al Smith				0021					
Academic Institution		PeopleSoft University							
Academic Career:		Undergraduate		Application Number:		00024144		Events	
School Information									
Last School Attended:		000010096		Richmond College					
Graduation Date:		06/04/1998							
School Type:		Secondary		Proprietorship:					
City:				State:				Country:	
Recruiting Information									
Region:		CCOAST		CA Central Coast					
From:		Region Tree							
Primary Recruiter ID:		AD1041		Bill Dern		Staff			
								Assign Region From <input type="button" value="Home Postal Code"/> <input type="button" value="School Postal Code"/>	
Recruiting Categories Find View All First 1 of 1 Last									
*Category:		HGPA		High GPA		Group:		Academic	
Sub-Cat:		High							
Description:									
Recruiters Find View All First 1 of 1 Last									
Recruiters Prompt		*Recruiter ID		Recruiter Type		Primary:			
<input checked="" type="checkbox"/> Recruiters		AD1041		Bill Dern		Staff		<input checked="" type="checkbox"/>	
Transfer To:		Education		<input type="button" value="Go"/>					

Note: If the applicant had a prospect record, and you selected the **Move to Application** option on the Prospect Recruiters page, and your setup dictates that data from the prospect record be copied to the application, the system automatically populates some of the fields on this page. For example, the **Last School Attended** and **Graduation Date** fields could be populated by the values in the matching prospect record.

School Information

<i>Field or Control</i>	<i>Description</i>
Last School Attended	<p>Enter the last school attended for this applicant. Because a person might have attended several schools in his or her external academic career, it is helpful to know which school was attended most recently. This is a user default field.</p> <p>Upon the first save of the application, the value entered in this field is added to the Education component automatically. After you enter a school, you might receive a message informing you that this school will not be added to the Academic History record, depending on how your institution has set this parameter on the Installation - AD page. Schools are stored for academic history in the Education component. The school you store here is for recruiting and informational purposes.</p>
Graduation Date	Enter the graduation date. A graduation date can be in the future if the person is still attending this school.

Recruiting Information

<i>Field or Control</i>	<i>Description</i>
Region	Enter a region if you want to choose a region from the region tree manually. Only regions from your region tree are available for selection. Define regions on the Region Table page.
Home Postal Code	Click this button if you want the system to assign a region based on the postal code in the applicant's home address. The system uses the tree manager to assign a region based on the postal code.
School Postal Code	Click this button if you want the system to assign a region based on the applicant's last school attended postal code. The system uses the tree manager to assign a region based on the postal code.
From	<p>This display-only field shows you how this region was defined:</p> <p><i>Region Tree:</i> If you <i>manually</i> assigned a region.</p> <p><i>Address:</i> Assigned if you click the Home Postal Code button.</p> <p><i>School:</i> Assigned if you click the School Postal Code button.</p>

Recruiting Categories

Use the fields in this group box to target the applicant for special recruiting efforts during the admissions process regarding this application.

Field or Control	Description
Category	<p>Enter a recruiting category for the applicant under this career and application. For example, in the previous screen example, this applicant is being recruited according to the geographic region of her school. Define recruiting categories on the Recruiting Category Table page. These same categories are used in both the recruiting and application processes to target and report on students.</p> <p>If you plan to assign a recruiter to this applicant based on your region tree, you must enter a category of <i>REGN</i> (region). Only the recruiters assigned to the region appearing in the Region field will be available.</p>
Group	The group under which this category falls automatically displays when you move out of the Category field.
Sub-Category	Select a recruiting subcategory. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>High</i> , <i>Low</i> , and <i>Medium</i> . A subcategory can be used to indicate the priority of this recruiting category.
Description	Enter any descriptive information regarding the recruiting category.

Note: You can enter multiple recruiting categories and supporting information for an application.

Recruiters

This group box becomes available if you have entered a recruiting category. The recruiter assignment is tied to the recruiting categories. Use this section of the page to assign one or more recruiters, relevant to this category, for the applicant.

Field or Control	Description
Recruiters Prompt	<p>Select this check box if you want <i>all</i> recruiters in your database to be available when you prompt on the Recruiter ID field, regardless of the recruiting category to which recruiters are assigned.</p> <p>Clear this check box if you want <i>only</i> the recruiters assigned to the current recruiting category to be available when you prompt on the Recruiter ID field. (Note that the <i>REGN</i> category works differently).</p> <p>If you are adding recruiters for the recruiting category <i>REGN</i>, you select only from recruiters who were assigned the region that appears in the Region field.</p> <p>If you entered the region according to the last school attended using the School Postal Code button; the Prompt Table field displays <i>Recruiters for School's Region</i>. Select the prompt to bring up any recruiters assigned to that school. If no recruiters are assigned to that school, then your choices are any recruiters assigned to the region.</p> <p>If you entered the region according to the applicant's home address using the Home Postal Code button, the Prompt Table field displays <i>Recruiters from Address Region</i>. Click the prompt to bring up all recruiters assigned to the region.</p> <p>If you manually chose the region from the region tree, all recruiters assigned a recruiting category of <i>REGN - Region</i> are available when you prompt for values on the Recruiter ID field. The Prompt Table display field in this case displays <i>Recruitment Category</i>.</p>
Recruiter ID	<p>Enter the ID number of the recruiter that you want to assign to this applicant. The region tree determines which recruiters to make available for selection, based on the region that you assigned to the applicant.</p> <p>You can override the region tree selection by selecting the Recruiters Prompt check box. If selected, all recruiters for the academic career are available.</p> <p>You can assign an applicant multiple recruiters for any recruiting category.</p>

Field or Control	Description
Primary	Select this check box if this is the primary recruiter for this category. The ID of the person who has been marked primary displays in the Prmy Recruiter ID (primary recruiter ID) field. You can use this field to report on primary versus non-primary recruiters.
Events	Click this link to sign an applicant up for attendee events. The Attendee Events page appears.
Go	Click this button to go to another component.

Note: After you save the information on these pages, all modifications must be made on the Application Recruiters page in the Application Maintenance component.

Entering or Updating Applicant Additional Details

Access the Additional Details page (**Student Admissions > Application Entry > Add Application > Additional Details**).

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

The screenshot shows the 'Additional Details' page for a new application. The page is divided into several sections:

- Navigation Bar:** Contains tabs for 'Application Program Data', 'Application Regional', 'Application Data', 'Application School/Recruiting', and 'Additional Details' (which is the active tab).
- Form Fields:**
 - Academic Institution:** Fields for 'PeopleSoft University' and 'Medical School'.
 - Application Number:** A field containing '00000000'.
 - Other Institutions:** A section with a table for adding other schools. It includes fields for 'School', 'State', 'City', 'Description', 'Country', and 'Proprietorship'. There are also search icons and a '+ -' button.
 - Source of Interest:** A section with a 'Referral Source' field and a search icon.
 - Transfer To:** A dropdown menu currently set to 'Education' and a 'Go' button.

Use this page to enter additional details about the applicant, including information about other schools to which the applicant has applied for admission, and the applicant's referral source.

Other Institutions

You can either select a school using the School lookup field, or you can manually enter the Description, State, and Country fields.

Field or Control	Description
School	Select from the external organizations defined by the institution.

Adding Communications, Checklists and Comments for Applicants

The Communication, Checklist and Comment buttons appear next to the **Application Number** field on the Application Data, Application School/Recruiting, and Application Recruiters pages, and next to the **Expected Graduation Term** field on the Application Program Data page.

Use the Communication, Checklist and Comment buttons from this component to open a new window for the entry pages for communication, checklist, and comments and initiate recruiting and admissions related items.

If the Communication, Checklist or Comments Pages are Accessed From the:	The Variable Data for the Following Administrative Function is Supplied:	Data that is Transferred
Application Program Data page	ADMP Admissions Program	ID, academic career, student career number, application number, application program number.
Application Data page	ADMA Admissions Application	ID, academic career, student career number, application center.
Application School/Recruiting page	EVNT Event	ID

Related Links

"Understanding the 3C Engine" (Campus Community Fundamentals)

Adding New Prospects and Applications with Quick Admit

Recruiting and Admissions can take information concerning people enrolled from the Student Records Quick Admit process and at your discretion, create a prospect record and an application, or an application only for those people.

This section provides an overview of quick enroll and quick admit and discusses how to:

- Enter biographical details.
- Enter regional data.
- Enter or view academic program data.
- Select your criteria for quick admit batch apps.
- Assign criteria for quick admit.

Understanding Quick Enroll and Quick Admit

The Quick Admit a Student component, Quick Enroll and Student component, and Quick Admit Batch Apps component are a variation on the fuller processes of admitting students and enrolling them into classes. Typically, you will use these components in conjunction with each other to accelerate admissions and enrollment procedures where immediate formal processing is not required or is unavailable for students. In addition, collecting admissions information on students who have been quick admitted might be useful for various funnel reports.

The Quick Admit a Student component and Quick Enroll a Student component, when used together, enable you to rapidly add or update a student's personal data in your system; activate the student in an academic career, academic program, or term; and enroll the student in classes.

The Quick Admit a Student component works concurrently with the Quick Admit Batch Apps component. Whenever you admit a student through the Quick Admit a Student component, the system flags the student's record to indicate that the student has been admitted by this method. The system then places these records into a temporary table awaiting your action. Using the Quick Admit Batch Apps component, you can then run the Quick Admit Process (ADQCKADM) to create prospect records and applications for these flagged records in the temporary table. The Quick Admit Batch Apps component and Quick Admit a Student component are not a replacement for the regular Recruiting and Admissions functionality. You must use the Application Data pages for regular admissions.

You can use the Quick Admit a Student component to add a new student's personal data record to your system, to activate a student into an academic career and an academic program within that academic career, and to activate a student into a specific term. By completing and saving the Quick Admit a Student component, a student quickly becomes eligible for class enrollment. You can also use the Quick Admit a Student component to update a new or continuing student's personal data record after the student already has an existing personal data record stored in the system. If you are entering new students into the system through the Quick Admit a Student component and you click the Save button after entering the student's biographical data and program data, the system assigns the student a unique ID that remains associated with the individual in your database until you change or delete it. Remember that each user has access to specific edit modes based on her or his security profile.

Important! To avoid creating duplicate IDs in your system, you should use the search/match function to determine if an individual with the same data already exists in your database before adding the new individual.

For new students, you can use the Quick Admit a Student component to enter the biographic, demographic, address, and program data about the student. When you save the component, the system:

- Assigns the new student an ID and creates a row for the student in the person tables.

- Activates the new student in the academic program that you select within the specific academic institution and academic career that you specify.
- Activates the new student in the term that you select, creating a row in the student term table (STDNT_CAR_TERM) for the student.

For continuing students, you can use the Quick Admit a Student component to activate the student into a subsequent term; or to activate the student into a new academic career. When you save the component, the system:

- Updates the data for the student in the person tables.
- Verifies whether the student has already been activated for the term, and if not, activates the student in the term, creating a new row in the student term table (STDNT_CAR_TERM) for the student.
- Activates the continuing student in the new academic program that you select within the specific academic institution and career that you specify when you are adding the student to a new academic career.

After you have saved the student's biographical data and activated the student into the term, the student is eligible for class enrollment. You can then use the Quick Enroll a Student component to rapidly enroll students into the term. The system carries forward the key information (ID, academic institution, academic career, and term) and automatically opens the Quick Enroll a Student component for the given student.

When you access the Quick Admit a Student component, a dialog box prompts you to enter the key values of the admissions transaction. The key values are:

Term	Definition
ID	<p>In add mode, the system defaults the student's ID to <i>New</i>. For a student new to your system, you can use the default value to have the system assign the ID, or you can enter a new ID of your choice provided that it does not belong to another individual already in the system , or you can enter a student's existing ID.</p> <p>In other modes, the system prompts you to search for an existing ID.</p> <p>If you enter a new ID of your choice, you run the risk of disrupting the auto-numbering sequence that is included with the system. If you disrupt the auto-numbering sequence, a system administrator must correct the situation.</p>
Academic Institution	Enter the academic institution to which you want to quickly admit the student.
Academic Career	Enter the academic career to which you want to quickly admit the student. Remember that academic careers are parents of academic programs. Therefore, when you enter an academic program on the Program/Plan page within this component, the system displays academic programs based only on the academic career you enter here.

Term	Definition
Term	<p>Enter the term for which you want to activate the student. After you enter the required data for a student into the Quick Admit a Student component and click the Save button, the system activates the student into the term that you specify. This functionality works for both new and continuing students.</p> <p>To use the Quick Admit feature for a specific term, you must already have defined your academic term calendar for the academic programs within that term.</p> <hr/> <p>Note: Quick Admit uses the Max Program Effective Date for Term field from the Term/Session Table when populating the Effective Date on Student Program/Plan. If the current date is less than or equal to the Max Program Effective Date for the activation term, the Effective Date field on Student Program/Plan will be set to current date. If the current date is greater than the Max Program Effective Date for the activation term, the Effective Date field on Student Program/Plan will be set to the Max Program Effective Date defined for activation term.</p> <hr/> <p>See "Defining Terms, Sessions, and Session Time Periods" (Campus Solutions Application Fundamentals)</p>
Add	Click to open the component with the specified key values.

The Quick Admit Batch Apps process is a two-step, two-page process. Use the first page in the Quick Admit Batch Apps component, the Selection Criteria page, to select a group of students who have been admitted through the Quick Admit a Student component. Use the second page in the Quick Admit Batch Apps component, the Assignment Criteria page, to specify whether to create historical prospect and application records or new prospect and application records, or both.

Related Links

"Understanding Class Enrollment Processing" (Student Records)

Pages Used to Add New Prospects/Applications with Quick Admit

Page Name	Definition Name	Navigation	Usage
Quick Admit - Biographical Details	SCC_BIO_DEMO_PERS	Records and Enrollment > Enroll Students > Quick Admit a Student > Biographical Details	Enter or update a student's biographic and demographic information.
Quick Admit - Regional	SCC_BIO_DEMO_REG	Records and Enrollment > Enroll Students > Quick Admit a Student > Regional	Enter or update a student's information according to regional data requirements.

Page Name	Definition Name	Navigation	Usage
Quick Admit - Program/Plan	PROGRAM_PLAN	Records and Enrollment > Enroll Students > Quick Admit a Student > Program/Plan	For new students, select the primary academic program for which you want to activate the student in a term and enter other program stack information. For continuing students, view the student's career number and primary academic program or add the student to a new academic career. If you want make any changes to a new or continuing student's program stack information after you save the student to your system, you must use the Student Program/Plan component.
Quick Admit - Selection Criteria	QUICK_ADMIT_SELECT	Records and Enrollment > Enroll Students > Quick Admit Batch Apps > Selection Criteria	Enroll students into classes without going through a formal admissions process.
Quick Admit - Assignment Criteria	QUICK_ADMIT_CREATE	Records and Enrollment > Enroll Students > Quick Admit Batch Apps > Assignment Criteria	Create applications for the group of quick-admitted students that you selected in the first page of this component.

Entering Biographical Details

Access the Quick Admit - Biographical Details page (**Records and Enrollment > Enroll Students > Quick Admit a Student > Biographical Details**).

This page is part of the Quick Admit a Person feature, which enables you to rapidly admit students into your institution. The system saves any biographic and demographic data that you add or change to the person tables. You can maintain a student's biographical data through either the Quick Admit component or the Add/Update a Person component found in PeopleSoft Campus Community.

See [Entering or Updating Applicant Biographical Data](#).

Entering Regional Data

Access the Quick Admit - Regional page (**Records and Enrollment > Enroll Students > Quick Admit a Student > Regional**).

This page is part of the Quick Admit a Student feature, which enables you to rapidly admit students into your institution. The system saves the regional data that you add or change to the person tables. You can maintain a student's biographical data through either the Quick Admit component or the Add/Update a Person component found in PeopleSoft Campus Community.

Related Links

"Understanding Biographical Information" (Campus Community Fundamentals)

Entering or Viewing Academic Program Data

Access the Quick Admit - Program/Plan page (**Records and Enrollment > Enroll Students > Quick Admit a Student > Program/Plan**).

This example illustrates the fields and controls on the Quick Admit - Program/Plan page. You can find definitions for the fields and controls later on this page.

Biographical DetailsRegionalProgram/Plan

NEW

Career:UGRD UndergradInstitution:PSAUS PSAUSTerm:0621 2009 Sem1

Program and Plan

Academic Program Primary:

BART

BArT

Campus:

MAIN

Main Campus

Academic Plan:

PSYCHOLOGY

Psychology

Admit Term:

0621

2009 Semester 1

Requirement Term:

0621

2009 Semester 1

Expected Graduation Term:

Mode of Attendance:

Internal Mode of Attendance

Cohort:

0900

2009 Commencing

Funding Source:

CSP

Commonwealth Supported Place

[Residency](#)

Note: Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Entering Program Stack Data for New Students

When you add a new student to your system, the following fields appear:

Field or Control	Description
Academic Program Primary	Enter the primary academic program into which you want to matriculate and activate the student. The system prompts you with academic career values specific to the academic career that you selected as a key upon entering the component.

Field or Control	Description
Campus	Enter the campus where the student is going to take the primary academic program.
Academic Plan	Enter the student's primary academic plan within the primary academic program. If a student requests multiple academic plans within the academic program, you must enter the additional academic plans through the Student Program/Plan component.
Admit Term	The term in which you are matriculating the student into the academic program. The admit term usually defaults from the Recruiting and Admissions matriculation process. However, because you are performing a quick activation and are going to matriculate the student through this Quick Admit a Student component, you must enter the admit term for the primary academic program that you have specified.
Requirement Term	The requirement term indicates to the system which term's degree progress requirements apply to the student for the primary academic program that you have specified. The system, by default, sets this value to the Admit Term value.
Expected Graduation Term	Enter the term in which you expect the student to graduate. Define term values on the Term Table page.
(NZL) Funding Source	This field is used by New Zealand institutions.
(AUS) Mode of Attendance	<p>The Mode of Attendance field is a required field that is populated on each student's application. This data is required for reporting admissions data to the TACs via the Enrollment Feedback process as well as reporting element 329 Mode of Attendance code in DEEWR Data Collections.</p> <p>The Mode of Attendance field resides on Application Entry, Application Maintenance, and Program Addition pages. It is a required field when you enter an application. After the student is matriculated, the mode of attendance is carried forward to the student program.</p>

Field or Control	Description
(AUS) Cohort	(Optional) Select a cohort for the student that the system will use as the default value when you enroll the student. The system populates this value by default on the Australian regional enrollment data and the field is available to tuition calculation for HECS or tuition fees if the Australian Regional Installation Settings are selected. After the student is matriculated, the cohort is carried forward to the student program.
(AUS) Funding Source	(Optional) Select a funding source for the applicant to represent the type of place being offered. The funding source can be mapped to the code reportable as element 724 in the DEEWR Applications & Offers Collection. See "Generating the Applications and Offers Files" (Student Records).
Residency	Click to display the Residency Official page and record residency information that has been verified by your institution.
Quick Enrollment	Click to access the Quick Enroll component, where you can process enrollment transactions for the student.
Enrollment Appointments	Click to access the Appointments component, where you can add and update enrollment appointments for the student.
Student Program Plan	Click to access the Student Program/Plan component and make any changes to a new or continuing student's program stack information after the student data has been saved to your system.

Viewing Program Stack Data After Saving the Component

When you are updating a new or continuing student's records, only the following fields appear:

Field or Control	Description
Student Career Nbr (student career number)	The system uses the student career number to differentiate between academic programs within the same academic career. For students with multiple academic programs within the same academic career, you must enter the student career number for which you want to activate the student into the term you have specified. If the student has only one student career number in a specific academic career, the field is unavailable for edit.
Prim Prog (primary program)	The system displays the primary academic program associated with the student career number. The primary academic program that appears is the academic program into which the system activates the student for the term that you have specified.

Related Links

"Understanding Biographical Information" (Campus Community Fundamentals)

[Understanding Quick Enroll and Quick Admit](#)

"Entering Residency Data" (Campus Community Fundamentals)

Selecting Your Criteria for Quick Admit Batch Apps

Access the Quick Admit - Selection Criteria page (**Records and Enrollment > Enroll Students > Quick Admit Batch Apps > Selection Criteria**).

Field or Control	Description
Academic Institution	Enter the academic institution from which you want to select quick-admitted students. You can enter multiple academic institutions. You must enter at least one academic institution.
Academic Career	Enter the academic career from which you want to select quick-admitted students. You can enter multiple academic careers.
Academic Program	Enter the academic program from which you want to select quick-admitted students. You can enter multiple academic programs.
Academic Plan	Enter the academic plan from which you want to select quick-admitted students. You can enter multiple academic plans.

Assigning Criteria for Quick Admit

Access the Quick Admit - Assignment Criteria page (**Records and Enrollment > Enroll Students > Quick Admit Batch Apps > Assignment Criteria**).

This example illustrates the fields and controls on the Quick Admit - Assignment Criteria page (1 of 2). You can find definitions for the fields and controls later on this page.

Selection Criteria		Assignment Criteria	
Run Control ID: PS		Report Manager Process Monitor Run	
Processing Options			
<input checked="" type="radio"/> Create Applicant / Prospect <input type="radio"/> Delete from Holding Table			
Create Records from Quick Enrl			
<input checked="" type="checkbox"/> Create History <input checked="" type="checkbox"/> Create New <input checked="" type="checkbox"/> Create Application <input checked="" type="checkbox"/> Create Prospect			
Create History Values			
'Acad Level:	<input type="text"/>	'Admit Type:	<input type="text"/>
'Appl Ctr:	<input type="text"/>	'Acad Load:	<input type="text"/>
'Appl Meth:	<input type="text"/>	'Rcrtg Stat:	Applicant
'Recr Ctr:	<input type="text"/>	'Refrl Srce:	APPL
<input type="button" value="Copy History Values to New"/>			

This example illustrates the fields and controls on the Quick Admit - Assignment Criteria page (2 of 2). You can find definitions for the fields and controls later on this page.

Create New Assignment Values					
'Institution:	PSUNV	PSU	'Career:	UGRD	Undergrad
'Admit Term:	0390	2000 Sprng	'Admit Type:	FYR	First-Year
'Acad Prog:	LAU	Lib Arts	'Prog Actn:	ADMT	Admit
'Action Rsn:	AUTO	Auto Assign	'Acad Level:	1st Year	
'Appl Ctr:	<input type="text"/>		'Acad Load:	<input type="text"/>	
'Appl Meth:	<input type="text"/>		'Rcrtg Stat:	Applicant	
'Recr Ctr:	<input type="text"/>		'Refrl Srce:	APPL	Applicatn
<input type="button" value="Find"/> <input type="button" value="View All"/> <input type="button" value="First"/> <input type="button" value="1 of 1"/> <input type="button" value="Last"/>					
'Academic Plan:	SOC	Sociology	<input type="button" value="+"/> <input type="button" value="-"/>		

Field or Control	Description
Create Applicant/Prospect	Select this option to create prospect and application records for the selected group of students.
Delete From Holding Table	Select this option to take the selected group of students and delete them from the temporary table. Selecting this option will disable the remaining fields on the page. If this is the desired option, click the Run button to initiate this process. If you use the Quick Admit a Student feature but do not create applications for quick admitted students, you should run this process to clean out the temporary table.
Create History	Select this check box to create history records for the group of students you have selected. The system adds the students to the prospect and applicant tables even though they bypassed the normal admissions process. The data created is based on the data entered on the Quick Admit pages. Selecting this check box ensures that admissions information is available for these people for your admissions reporting purposes.
Create New	Select this check box to create a new set of prospect and application records for the selected group of students. Prospect and application records will be created based on the parameters in the Assignment Values group box.
Create Application	Select this check box to create applications for the selected group of students. This field is available if you select the Create New check box.
Create Prospect	Select this check box to create prospect records for the selected group of students specified on the Selection Criteria page. If the Create Application check box is selected, the availability of this field is determined by the settings on the Installation Defaults - AD page.

The following fields appear, regardless of whether you choose Create History or Create New:

Field or Control	Description
Acad Level (academic level)	Select the academic level that you want to assign to the selected group.
Admit Type	Enter the admit type that you want to assign to selected group.
Appl Ctr (application center)	Enter the application center that is populated for each application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page.

Field or Control	Description
Acad Load (academic load)	Select the academic load that the applicants will carry. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Full-Time</i> and <i>Part-Time</i> .
Appl Meth (application method)	Select a value to indicate how or in what form the application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Application Service</i> , <i>Diskette</i> , <i>Hard Copy</i> , <i>Web Application</i> , <i>EDI</i> , and <i>OUAC</i> .
Rcrtg Stat (recruiting status)	Select the recruiting status that will be populated on the prospect record of this applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Applicant</i> , <i>Inactive</i> , <i>Inquiry</i> , <i>Pre-Appl</i> , <i>Prospect</i> , and <i>Suspect</i> . This field appears only if the Create Prospects field on the Installation – AD page is set to <i>Yes</i> .
Recr Ctr (recruiting center)	Enter the recruiting center that is responsible for this particular program on the prospect record. Define recruiting centers on the Recruiting Center Table page. This field appears only if the Create Prospects field on the Installation – AD page is set to <i>Yes</i> .
Refrl Srce (referral source)	Enter the appropriate referral source that will be populated on the prospect record. A referral source indicates how this person became a prospect. In other words, it is a high-level indicator of how your institution came into contact with the person. For example, a referral source could be <i>Drop-In</i> , <i>Campus Event</i> , or <i>College Fair</i> . Define referral sources on the Referral Source Table page. This field appears only if the Create Prospects field on the Installation – AD page is set to <i>Yes</i> .
Copy History Values to New	Click to transfer values entered for Create History to the corresponding fields in the Create New section. This minimizes data entry.

The following fields are associated solely with the Create New option:

Field or Control	Description
Institution	Enter the academic institution that you want to assign to the selected group.

Field or Control	Description
Career	Enter the academic career that you want to assign to the selected group.
Academic Plan	Enter the academic plan that you want to assign to the selected group of students.
Acad Prog (academic program)	Enter the academic program that you want to assign to the selected group.
Prog Actn (program action)	Enter the program action that you want to assign to the selected group.
Action Rsn (action reason)	Enter the action reason that you want to assign to the selected group.
Admit Term	Enter the admit term that you want to assign to the selected group.
Academic Plan	Enter the academic plan that you want to assign to the selected group of students.

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

Student records that were processed are automatically deleted from the temporary record, so it is not necessary to run the Delete from Holding Table process.

Creating Applications from External Test Score Data

If application data is included in your LAW, AMCAS, or ADA external test score loads, you can load the data as new applications. The data used to create new applications comes from the Additional Candidate Information data posted to the following pages:

Test	Page Where Data Comes From
LAW	Personal Information
AMCAS	Application
ADA	Application

After the external application data is posted to your database, you are ready to run the Create Applicants from Tests process.

Note: Applications are created for all records posted to the Additional Candidate Application Information pages listed in the previous table if the Post option contains the *Select for Application Creation* value. After the Create Applicants from Tests process runs, the process updates the Post option to *Created Application* if the process created an application for the person, or *Duplicate Application* if a potential duplicate was found and the program did not create an application.

You must set up some initial parameters before activating the process.

To run the Create Applicants from Tests process:

1. Select the test score load data.
2. Set up the application program parameters.
3. Set up the application data parameters.
4. Set up the application recruiting data parameters and run the Create Applicants from Tests process.

Related Links

[Understanding External Test Score Data Processing](#)

Pages Used to Create Applications from External Test Score Data

Page Name	Definition Name	Navigation	Usage
Create Applicants From Tests	ADM_APPL_PROC_PARM	Student Admissions > External Test Score Processing > Create Applicants from Tests	Indicate which type of application you want to load.
Application Program Parms (application program parameters)	ADM_PROG_PARMs	Student Admissions > External Test Score Processing > Create Applicants from Tests > Application Program Parms	Set up default program parameters for the new applications. The values you select for the fields on this page are inserted on the Application Program Data page when the new applications are loaded.
Application Data Parms (application data parameters)	ADM_APPL_PARMs	Student Admissions > External Test Score Processing > Create Applicants from Tests > Application Data Parms	Set up default application data parameters to be filed in on new applications. The values you select for the fields on this page are inserted on the Application Data page when the new applications are loaded.

Page Name	Definition Name	Navigation	Usage
Application Recruit Parms (application recruit parameters)	ADM_RECRUIT_PARMS	Student Admissions > External Test Score Processing > Create Applicants from Tests > Application Recruit Parms	Set up default application recruiting parameters to be filled in on new applications. The values you select for the fields on this page are inserted on the Application School/ Recruiting page when you load the new applications.

Selecting the Test Score Data Load

Access the Create Applicants From Tests page (**Student Admissions > External Test Score Processing > Create Applicants from Tests**).

Select the type of external test data from which you want to create applications: *LAW Test Score Data*, *MCAT Test Score Data*, or *ADA Test Score Data*.

Setting Up the Application Program Parameters

Access the Application Program Parms (application program parameters) page (**Student Admissions > External Test Score Processing > Create Applicants from Tests > Application Program Parms**).

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

Create Applicants From Tests	Application Program Parms	Application Data Parms	Application Recruit Parms
Run Control ID: 1 Report Manager Process Monitor <input type="button" value="Run"/>			
Program Data			
*Institution:	PSUNV	PeopleSoft University	*Career:
			UGRD Undergrad
*Admit Term:	0550	2005 Fall	*Acad Load:
			Full-Time
*Acad Prog:	LAU	Lib Arts	*Campus:
			MAIN Main
Program Status			
*Status:	Applicant	*Prog Actn:	APPL Application
Action Reason:			
Plan Data			
Acad Plan:	ENGL-BA	English (BA)	
Sub-Plan Data			
Sub-Plan:			

Note: Some of the fields on this page might populate automatically according to your user defaults. You can edit those fields as needed.

Field or Control	Description
Admit Term	Enter the admit term for these applicants. Define admit terms on the Term Values Table page.
Acad Load (academic load)	Select the academic load for these applicants. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Program (academic program)	Enter the academic program for these applicants. Only the academic programs for the chosen career appear in the prompt list. Define academic programs on the Academic Program Table page.
Campus	Enter the campus being applied to within your institution. Define campuses on the Campus Table page.
Status	Select the person's program status. This value is entered on the application. Values for this field are delivered with your system as translate values. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Prog Actn (program action)	Enter the program action that you want entered regarding the program on these applications. Because the intent of this process is to create applications, not all program actions are available when you prompt on this field. Program actions are stored on the Program Action Table page.
Action Reason	If there are action reasons associated with the program action that you selected, you can enter the appropriate reason value. Define action reasons on the Action Reason Table page.
Acad Plan (academic plan)	Enter an academic plan for these applications. Define academic plans on the Academic Plan Table page.
Sub-Plan	Enter a subplan for these applications. Define academic subplans on the Academic Sub-Plan Table page.

Setting Up the Application Data Parameters

Access the Application Data Parm (application data parameters) page (**Student Admissions > External Test Score Processing > Create Applicants from Tests > Application Data Parm**s).

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

Note: Some of the fields on this page appear automatically according to your user defaults. Edit these fields as needed.

Field or Control	Description
Application Center	Enter the application center for these applications. The only values available are those that fall under the academic career entered on the Application Program Parameters page.
Housing Interest	Select a housing interest, if applicable. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Commuter</i> , <i>Off Campus</i> , and <i>On Campus</i> .
Financial Aid Interest	Select this check box if you want the system to select the corresponding check box on the newly created applications. This field is useful for informational and reporting purposes. For example, your financial aid office can run reports listing those applicants interested in financial aid.
Fee Type	Select the fee type you want entered for these applications. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Internatnl</i> (international) and <i>Standard</i> .
Complete	Select this check box to mark these applications complete.
Admit Type	Enter the admit type that you want entered for these applications. Define admit types on the Admit Type Table page.

Field or Control	Description
Academic Level	Select the academic level you want entered for these applications. Values for this field are delivered with your system as translate values. You can modify these translate values.
Notification Plan	Select the notification plan that you want entered for these applications. A notification plan specifies whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Early Admt</i> (early admit), <i>Regular</i> , and <i>Rolling</i> .
Application Method	Select the application method that you want entered for these applications. Application methods indicate how or in what form you received these applications. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are (none), Application Service, Diskette, Hard Copy, Web Application, EDI, and OUAC.

Setting Up the Application Recruiting Parameters

Access the Application Recruit Parms (application recruit parameters) page (**Student Admissions > External Test Score Processing > Create Applicants from Tests > Application Recruit Parms**).

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

Create Applicants From Tests	Application Program Parms	Application Data Parms	Application Recruit Parms
Run Control ID: 1 Report Manager Process Monitor <input type="button" value="Run"/>			
Recruiting Information			
Region from:		Region:	CCOAST CA Central Coast
*Recruiting Center:		UGRD	Undergrad
Recruiting Category			
Category:		HGPA	High GPA
Sub-Cat:		High	
Recruiter ID:		AA0012	Sandra Kim <input checked="" type="checkbox"/> Primary Recruiter

Field or Control	Description
Region from	<p>Select how you would like the region to be assigned to these applications. Values are <i>School</i>, <i>Address</i>, and <i>Region</i>.</p> <p><i>School</i>: Not a valid choice. You will get an error message if you enter this value.</p> <p><i>Address</i>: Select this value if you want the system to automatically assign a region to these applications according to the applicant's home address.</p> <p>If you select <i>Address</i>, the Region field is not available because the system will assign the region based on the person's home address or the address of the last school attended.</p> <p><i>Region</i>: Select this value if you prefer to choose a region here to be entered on all applications.</p> <p>Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.</p>
Region	<p>Enter a region to be entered on these applications. This field is available only when you enter <i>Region</i> in the Region from field. It is automatically assigned when <i>Address</i> is entered. Define regions on the Region Tree page.</p>
Recruiting Center	<p>If you have indicated in your installation setup that you want prospect records to be created for applications that come in without existing matching prospect records, you must enter a recruiting center here to be added to the new prospect record. Define recruiting centers on the Recruiting Center Table page.</p>
Category	<p>Enter a recruiting category If you want a recruiting category entered on these applications. The recruiting categories available are based on the academic career that you selected.</p>
Sub-Category	<p>Select a recruiting subcategory for these applications (optional). Subcategories indicate your level of interest in the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>High</i>, <i>Low</i>, and <i>Medium</i>.</p>
Recruiter ID	<p>If you have entered a recruiting category and you want a recruiter assigned to these applications under the chosen category, enter the recruiter identification number in this field. Only recruiters assigned to this academic career are available.</p>
Primary Recruiter	<p>Select this check box if you want the recruiter that you selected to be the primary recruiter for these applications.</p>

Click the **Run** button to run the Create Applicants from Tests process at user-defined intervals.

When this process runs, the system looks to the defaults you have set up on the Installation Defaults - AD page and creates a prospect record based on the Create Prospect setting.

Note: To view the applications posted for a person, use the Maintain Applications component, or for a summary of the applications, see the Application Summary page.

Related Links

[Setting Up Admission Installation Defaults](#)

Updating Applications

After you have entered and saved an application, you must use the Application Maintenance component to update the application. Use the Application Maintenance component to program, recruiting data and more. You can also use this component to calculate an application fee, calculate an enrollment deposit, and matriculate an applicant.

Data in this component is stored at the *application* level, as opposed to the applicant or program level. This data is relevant to all academic programs being applied to with this application. You can enter and edit information in this component.

This section lists prerequisites and discusses how to:

- Update or add application program data.
- Capture student response – why the student selected another institution.
- Add a program to an existing application.

Prerequisites

Before you can edit or add any additional information in the Application Maintenance component, an application must first be entered into the system through the Application Entry component.

The Process Applications, Application Maintenance component is the third of three very similar components:

- Student Recruiting, Add/Update a Prospect component.
- Student Admissions, Add Application component.
- Student Admissions, Maintain Applications component.

For example, Add/Update a Prospect and Add Application have a Bio/Demo (biographic/demographic), Regional, and Personal pages. All three components have pages with similar names such as Prospect Academic Program Data page and Application Program Data page. You use these components to enter or maintain similar information at different times in your business process for prospects, for entering application data, and for maintaining application data.

For information on the Biographical Details, Regional, and Personal pages, see any one of the following:

- [Adding New Applications Manually](#)

- [Adding Prospects Through the Create/Update Prospects Component](#)

Pages Used to Update Applications

Page Name	Definition Name	Navigation	Usage
Application Program Data	ADM_APPL_PROG_MNT	Student Admissions > Application Maintenance > Maintain Applications > Application Program Data	Edit or update program and plan data for an application. You can also create an enrollment deposit and matriculate an applicant from this page. <i>All</i> applications must be tied to an academic career and program. Any lower level tracking depends on your office's policies.
Application Data	ADM_APPL_DATA	Student Admissions > Application Maintenance > Maintain Applications > Application Data	Update information for an application.
Application School/Recruiting	ADM_APPL_RECRUIT	Student Admissions > Application Maintenance > Maintain Applications > Application School/Recruiting	Update or add recruiting information data. See Entering Recruiting Information for an Application .
Application Student Response	ADM_APPL_STDNT_RSP	Student Admissions > Application Maintenance > Maintain Applications > Application Student Response	Capture the reason why a prospect or applicant chose to attend another institution and what institution he or she will be attending.
Program Addition	ADM_APPL_ADD_PROG	Student Admissions > Application Maintenance > Program Addition	Add a program to an existing application if you have already created an application number for that person within the same career. This page is only for <i>adding</i> an academic program and program-related information. You perform all <i>modifications</i> to existing academic programs using the Application Program Data page in the Maintain Applications component.

Updating or Adding Application Program Data

Access the Application Program Data page (**Student Admissions > Application Maintenance > Maintain Applications > Application Program Data**).

Note: Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Field or Control	Description
UCAS Personal ID, UTT Personal ID, or Apply Candidate ID	Any one of these links appears depending on the type of application. Click the link to go to the corresponding application page.
Sequence	<p>The default of the sequence is 1. The sequence appears in the field to the right of the Effective Date field.</p> <p>When you enter more than one row for the same effective date, the system automatically increments the sequence.</p>

Field or Control	Description
Program Action	If you are adding a new row, the Program Action field is blank, because the system is assuming you want to update the status of this application. Edit or add the appropriate program action value. Program actions are stored on the Admissions Action Table page and will display based on your Admissions Action security.

Note: Since each application number tracks to one set of application data, including an Application Center, Oracle does not recommend using multiple admit terms and multiple programs for a single application number.

Related Links

[Entering Application Program Data](#)

Capturing Student Response – Why the Student Selected Another Institution

Access the Application Student Response page (**Student Admissions > Application Maintenance > Maintain Applications > Application Student Response**).

Student response information is important information your institution might want to track and report on. You can choose from a series of adapted reason response codes that your institution can set up to capture the exact information you want to track. However, you can use this page however you want to. For example, you can capture why students chose *not* to attend your school and where they are going. Alternatively, you can capture the reason why a student *did* select your school. If a student has multiple applications on file, each application can have its own corresponding student response. You can enter multiple reasons per application.

Field or Control	Description
Reason	Enter a Student Response Reason code, for example <i>FAID</i> (financial aid). Define reason codes on the Response Reason Table page.
External Org ID (external organization ID)	<p>Enter the external organization ID of the institution that the student has decided to attend. The system displays the external organizations for which you selected the Student Response - School Type check box.</p> <p>You can enter a free-form institution name by tabbing out of the External Org ID field without entering a value and entering an institution in the field to the right. This way, the institution does not have to enter in all possible external institution codes. To enter a free form institution, you must select the Free Form Institution check box on the Installation - AD page.</p>
Date	The date the response reason was entered. The default date is your system date.

See [Setting Up Student Response](#).

Adding a Program to an Existing Application

Access the Program Addition page (**Student Admissions > Application Maintenance > Program Addition**).

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

Program Addition		Additional Information	
Pamela Boyle		ADCAF0001	
Academic Career:	Undergraduate	Application Nbr:	00026463
Program Data			
Program Number:	2	*Effective Date:	02/09/2013
*Academic Institution:	PSUNV PSU	*Admit Term:	0710 2013 Fall
*Academic Program:	LAU Lib Arts	Expected Graduation Term:	
*Campus:	WALCR Walnut	*Academic Load:	Full-Time
<input type="checkbox"/> Joint Program Academic Shift: day shift			
Program Enrollment			
Cohort Tag:	FALL-2011	APT Instance:	
Year of Program:	1st Year		
Program Status			
Status:	Applicant	Action Date:	02/09/2013
*Program Action:	APPL Application	Action Reason:	
Last Updated On:		By:	Evaluation
Career Number:	0		
Plan Data			
*Academic Plan:	PHYSICS Physics	Major	
Sub-Plan Data			
*Sub-Plan:	MECHANIC Mechanical Physics	Conc	

This component allows you to enter another program for an existing application. You may choose this option instead of creating a whole new application. The Program Number will increment by one based on the previous Program Number used for the application. For example, the student has one application on file with Program Number 0 for Liberal Arts and Program Number 1 for Fine Arts. Upon adding a new program from this component, the Program Number will increment to 2. After you have added the additional program, you maintain it through the Application Program Data page in the Maintain Applications component. You are prompted to choose the appropriate program number on the search page before accessing the Application Program Data page. To edit a different academic program for that application, you would need to click the Return to the Search button and choose the correct program number.

Note: Since each application number tracks to one set of application data, including an Application Center, Oracle does not recommend the use of multiple admit terms and multiple programs for a single application number.

Note: Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

For documentation about the fields on the Program Addition page, see [Entering Application Program Data](#).

For documentation about the Additional Information page, see [Entering or Updating Additional Information](#).

Viewing Application Summary Information

This section discusses how to view application summary information.

Pages Used to View Application Summary Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Summary	ADM_APPL_SUMM	Student Admissions > Applicant Summaries > Application Summary	View summary information about any application stored for an applicant.
Application Detail	ADM_APPL_SEC	Click the Application Detail link on the Application Summary page.	View application detail information.

Calculating Application Fees in Batch

This section discusses how to calculate application fees in batch.

Pages Used to Calculate Application Fees in Batch

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Batch Application Fees	RUNCTL_SFPBAAPP	Student Admissions > Application Fees and Deposits > Application Fees Process	Calculate application fees for a group of applicants. The Batch Application Fees process updates each applicant's application fee status on the Application Data page to <i>Completed</i> . The process also updates each applicant's customer account in PeopleSoft Student Financials if appropriate.

Page Name	Definition Name	Navigation	Usage
Application Fees (Batch)	APP_FEE_CALC	Student Admissions > Application Fees and Deposits > Review Batch Application Fees	View application fee information generated by the Batch Application Fees process. You must first run the Batch Application Fees process via the Batch Application Fees page.
Application Fee Calc Messages	APP_CALC_MESSAGES	Student Admissions > Application Fees and Deposits > Application Fee Calc Messages	View messages generated by the batch application fees process.

Calculating Application Fees in Batch

Access the Batch Application Fees page (**Student Admissions > Application Fees and Deposits > Application Fees Process**).

Field or Control	Description
Batch ID	The Batch Application Fees process assigns a batch ID after you initiate the process.
Academic Institution, Application Center, and Admit Term	Enter an academic institution, application center, and admit term. The Batch Application Fees process calculates application fees for the applicants that the process selects using this criteria.
Display Application Fees	Click this link to view the application fees for each applicant after you have run the Batch Application Fees process. The Application Fees (Batch) page appears.

Click the **Run** button to run the Batch Application Fees process at user-defined intervals.

Note: If you use AAWS and **Yes** is the option selected for the **Application Fee Required** field in the **AAWS Application Fee and Waiver Processing** group box on the Application Center Table page, then when you click **Run**, an error message appears: *Application fees for this Application Center can be calculated through Admissions Web Services only.*

See [Setting Up Application Processing Centers](#).

See [Reviewing and Editing Staged Admission Application Transactions](#)

Recording the Basis of Admission

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (Campus Community Fundamentals)

To set up a basis of admission, use the Basis of Admission component (BASIS_ADMIT_TABLE).

This section discusses how to:

- Define the basis of admission code.
- Assign the basis of admission codes to applicants.

You can set up basis of admission codes that represent general admission criteria—such as ACT test score, grade point average, or interview—then link the code or codes to applicants or students. You can also print the basis of admission on admission offer letters and transcripts.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

<i>Winword Merge Field</i>	<i>PeopleSoft RECORD.FIELD</i>
BasisAdmit	ADM_BASIS_ADMIT.BASIS_ADMIT_CODE
BasisAdmitDL	ADM_BASIS_ADMIT.DESCR254
BasisAdmitDE	BASIS_ADMIT_TBL.DESCR
BasisAdmitDS	BASIS_ADMIT_TBL.DESCRSHORT
BasisAdmitAcadProg	ADM_BASIS_ADMIT.ACAD_PROG
BasisAdmitTerm	ADM_BASIS_ADMIT.ADMIT_TERM
BasisAdmitBeginDt	ADM_BASIS_ADMIT.BEGIN_DT
BasisAdmitEndDt	ADM_BASIS_ADMIT.END_DT

Related Links

"Understanding Communication Management" (Campus Community Fundamentals)

Pages Used to Record the Basis of Admission

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Basis of Admission Setup	BASIS_ADMIT_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Application Evaluation > Basis of Admission Table	Define basis of admission codes. You link these codes to applicants and students on the Basis of Admission page.
Basis of Admission	ADM_APPL_BASIS_ADM	Records and Enrollment > Career and Program Information > Basis of Admission	Assign the basis of admission to an applicant or student.

Defining the Basis of Admission Code

Access the Basis of Admission Setup page (**Set Up SACR > Product Related > Recruiting and Admissions > Application Evaluation > Basis of Admission Table**).

<i>Field or Control</i>	<i>Description</i>
Include In Offer	Select this check box to include the code, description, short description, and long description by default on the admission offer letter for any applicant to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Offer check box on the Basis of Admission page.
Include In Transcript	Select this check box to include the code and long description by default on the transcript for any student to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Transcript check box on the Basis of Admission page.
Long Description	<p>Enter a default long description for this basis of admission code. The long description appears by default on the Basis of Admission page after you assign this code to the applicant or student.</p> <p>The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum score required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on their SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.</p>

Assigning a Basis of Admission to Applicants

Access the Basis of Admission page (**Records and Enrollment > Career and Program Information > Basis of Admission**).

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

Basis of Admission

John Smith
AD5024

Academic Institution: PSUNV
Academic Career: Undergraduate
Student Career Nbr: 0

Find | View All
First 1 of 1 Last

***Basis of Admission:** GBAP
Grade Point Average Basis

Application Nbr: 00022768
Application Program Nbr: 0

***Admit Term:**
Academic Program: LAU

Begin Date: 10/25/2004
☒ **Include in Offer**

End Date:
☐ **Include in Transcript**

Long Description:
Applicant's grade point average met minimum requirements for admission.

Transfer To: Application Maintenance
Go

Field or Control	Description
Basis of Admission	Enter a basis of admission code from the list of valid values. Define basis of admission codes on the Basis of Admission page.
Application Nbr (application number)	Enter an application number to assign the basis of admission to a specific application. (optional)
Application Program Nbr (application program number)	Enter an application program number to assign the basis of admission to a specific program. (optional)
Admit Term	Enter the individual's admit term. If an individual was admitted to more than one academic program, he or she could have multiple admit terms.
Academic Program	Enter the individual's academic program to which you want to apply the basis of admission. Individuals can be admitted to multiple academic programs. (optional)

Field or Control	Description
Begin Date	The default for the begin date is your system date.
End Date	Enter the date that you want this basis admission to be no longer valid. If you run the offer letter or transcript after this date it will not appear even if you have selected the Include in Offer check box.
Include in Offer	Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this applicant here.
Include In Transcript	Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this person here.
Long Description	<p>The long description appears from the Basis of Admission setup page. You can change the long description for this person here.</p> <p>The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on his or her SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.</p>
Go	Click this button to go to another component.

Recording Comments and Conditions for Admission

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (Campus Community Fundamentals)

To set up admission comment codes, use the Admissions Comments component (ADMISSION_COMMENTS).

This section discusses how to:

- Define admissions comment codes.
- Assign admission comment codes to applicants.

Recruiting and Admissions functionality enables you to record generic comments and then link them to an applicant. You can use this functionality however you like. One particular use is to record conditions of admission. For example, you can define a comment such as "You must successfully complete all current coursework." You can set up admission comment codes that represent general admission comments, then link the code or codes to the applicant. You can print the comments on the admission offer letter, and later, after the applicant becomes a student, you can print the comment on his or her transcript.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

Winword Merge Field	PeopleSoft RECORD.FIELD
AdmCommentCd	ADM_COMMENTS.ADM_COMMENT_CD
AdmCommentDL	ADM_COMMENTS.DESCRLONG
AdmCommentDE	COMMENT_CDE_TBL.DESCR
AdmCommentDS	COMMENT_CDE_TBL.DESCRSHORT
AdmCommentTerm	ADM_COMMENTS.ADMIT_TERM
AdmCommentProg	ADM_COMMENTS.ACAD_PROG
AdmCommentBegin	ADM_COMMENTS.BEGIN_DT
AdmCommentEnd	ADM_COMMENTS.END_DT
AdmCommentType	ADM_COMMENTS.COMMENT_TYPE

Related Links

"Understanding Communication Management" (Campus Community Fundamentals)

Pages Used to Record Comments and Conditions for Admission

Page Name	Definition Name	Navigation	Usage
Admissions Comments Table	ADM_COMMENTS_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Application Evaluation > Admissions Comments Table	Define admission comment codes.
Admissions Comments	STDNT_ADM_COMMENTS	Student Admissions > Application Evaluations > Application Decisions > Admission Comments	Assign admission comments to applicants.

Defining Admission Comment Codes

Access the Admissions Comments Table page (**Set Up SACR > Product Related > Recruiting and Admissions > Application Evaluation > Admissions Comments Table**).

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

Admissions Comments Table

Academic Institution: PSUNV PeopleSoft University

Admission Comment Code: S122

Find | View All First 1 of 1 Last

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

***Status:** Active

Comment Type

☒ Conditional
☐ Procedural

***Description:** Scholarship-Trustees

Short Description: Scholarshi

☒ Include in Offer
☐ Include In Transcript

Long Description:

Because of your outstanding high school record and achievements, you have been awarded an annual \$15,000.00 Trustees Honors Scholarship.

Field or Control	Description
Comment Type	Indicates the type of comment that you are entering. Select <i>Conditional</i> if the comment is a condition for admission, and <i>Procedural</i> if the comment is for procedure only. (informational only)

Field or Control	Description
Include In Offer	Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. When you select this check box, the system automatically selects the Include in Offer check box on the Admission Comments page.
Include In Transcript	Select this check box to include the code and long description on the student's transcript. When you select this check box, the system automatically selects the Include in Transcript check box on the Admission Comments page.
Long Description	Enter the full text of the comment for this admission comment code. The long description appears by default on the Admission Comment page after you assign this code to the applicant.

Assigning Admission Comments to Applicants

Access the Admission Comments page (**Student Admissions > Application Evaluations > Application Decisions > Admission Comments**).

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

Admission Comments

Al Smith

0021

Academic Career: Undergraduate

Student Career Nbr: 0

Institution: PSUNV

Find | View All

First 1 of 1 Last

*Admission Comment Code: S122 Scholarship-Trustees

Comment Type

☒ Conditional
 ☐ Procedural

*Admit Term:

Academic Program:

Begin Date: 09/15/2004

☒ Include in Offer

End Date:

☐ Include in Transcript

Description:

Because of your outstanding high school record and achievements, you have been awarded an annual \$15,000.00 Trustees Honors Scholarship.

Transfer To: Application Maintenance

Go

Field or Control	Description
Admission Comment Code	Enter a code. Define comment codes on the Admission Comment Table page.
Admit Term	Enter an admit term. If an applicant was admitted to more than one academic program, he or she can have multiple admit terms.
Academic Program	Enter an academic program. Applicants can be admitted to multiple academic programs. (optional)
Comment Type	Indicates the type of comment that you are entering. Select <i>Conditional</i> if the comment is a condition for admission, and <i>Procedural</i> if the comment is for procedure only. (informational only)
Begin Date	The default for the begin date is your system date.
End Date	Enter the date from which you want this comment to be no longer valid. If you run the offer letter after this date it will not appear even if you have selected the Include in Offer check box.
Include in Offer	Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Admission Comment Table page is selected. You can change the setting for this applicant here.
Include In Transcript	Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Admission Comment Table page is selected. You can change the setting for this applicant here.
Long Description	The long description appears from the Admission Comment Table page. You can change the long description for this applicant here.
Go	Click this button to go to another component.

Viewing Summary Checklist, Comment, and Communication Data

You can use summary pages for a quick view of checklists, comments and communications stored for prospects, applicants and recruiters. You can also view Operator 3C Groups pages for checklists, comments and communications.

- Use the Checklist Summary page (PERS_CHKLIST_SUMM) to access a summary of checklists associated with a recruiter, a prospect, or an applicant.

The Checklist Summary page enables you to designate which checklist information you want to see for a person.

- Use the Comment Summary page (CMNT_SUMMARY) to access a summary of comments associated with a recruiter, a prospect or an applicant.

The Comment Summary page enables you to designate which checklist information you want to see for a person.

- Use the Communication Summary page (COMM_SUMMARY) to view a summary of communications associated with a recruiter, a prospect, or an applicant.

This page enables you to designate which communication information you want to see for a person.

- Use the Operator 3C Groups Summary (Checklist) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Comment) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Communication) page (OPR_GRP_3C_SUM) to view the user 3C groups to which you are assigned.

Related Links

"Understanding the 3C Engine" (Campus Community Fundamentals)

Performing EDI TS130 Transcript Transactions

Prerequisites for Performing EDI TS130 Transcript Transactions

The EDI Manager provides the tools you need to manage electronic commerce transactions with your trading partners. To assist you in setting up the EDI Manager for recruiting and admissions application and transcript transactions, we have created some sample definitions in the EDI Manager. However, before processing EDI transactions, you might need to modify the setup to fit your particular needs. Therefore, it is important that you become familiar with PeopleSoft EDI architecture and recruiting and admissions processes to understand the implications of your EDI implementation decisions. The following paragraphs explain how this information *can* be set up.

When a trading partner submits an EDI transaction, it needs to address it to a specific business unit. In other words, the EDI agent needs to know in some way to which business unit to forward the transaction. Therefore, you must define entity codes that tell the EDI Manager where to forward the transaction. This PeopleSoft system includes sample entity codes for admissions transcript and application transactions, as well as sample internal and external partner definitions.

- The sample entity code provided for the Admissions Transcript Transaction (TS130) is ADTR - Admission Transcript Process.
- Two sample entity codes are provided for the Application for Admissions Transaction (TS189): ADAP - Admissions Applicant Processing and ADST - Admissions Applicant Student.
- The sample internal partner definition provided (for both the EDI TS130 and TS189 transactions) is Admissions - Admissions Office.
- The sample external partner definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_STX - Admissions EDI Supply Tech. As mentioned earlier, you might use another external partner as your EDI translator.

When you receive an EDI transaction from a trading partner, the first record of the transaction includes a *Transaction ID* that identifies the transaction type. The EDI agent uses the transaction ID, in conjunction with the trading partner ID, to determine which inbound map to use to process the transaction data. Similarly, when you initiate an outbound transaction, the EDI agent puts the appropriate transaction ID in the first transaction record so that the recipient knows what kind of transaction you have sent. The PeopleSoft system includes sample transaction definitions, partner profile definitions and conversion data profiles.

- The sample transaction definition provided for your ADM_TRNS_130 Admissions Transcript Transaction is ADM_TRNS_TS130 Inbound - Admissions Transcript Transaction.
- The sample transaction definition provided for your ADM_TRNS_189 Admissions Applicant Transaction is ADM_TRNS_TS189 Inbound - Admissions Applicant Transaction.

- The sample partner profile definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_P - Admissions EDI Transaction Profile.
- The sample conversion data profile provided is EDI_CONV - EDI TS130/TS189. Conversion Profile lists the conversion values used in your EDI load processing (for both the EDI TS130 and TS189 transactions).

Electronic commerce maps specify how the EDI Agent transfers data between PeopleSoft business documents and the staging tables in the PeopleSoft database. The EDI agent uses inbound maps to transfer data from PeopleSoft business documents to the staging tables, in preparation for processing by your Recruiting and Admissions application. PeopleSoft has created sample inbound map definitions.

- The sample inbound map definition provided for the Admissions Transcript Transaction (ADM_TRNS_TS130) is EC Map ID TS130_MAP.
- The sample inbound map definition provided for the Admissions Applicant Transaction (ADM_TRNS_TS189) is EC Map ID TS189_MAP.

When you add a trading partner, you assign to it a *map profile*, which lists the electronic commerce maps that the EDI agent can use to process transactions from the partner. The PeopleSoft system includes sample data mapping profile definitions.

The example data mapping profile definition provided is ADM_EDIMP - Admissions EDI Map Profiles. This definition lists the map assignments for the Admissions Transcript Transaction (ADM_TRNS_TS130) and the Admissions Applicant Transaction (ADM_TRANS_TS189).

See Also

The following topics in the product documentation for *PeopleTools: Supported Integration Technologies*

- “Using PeopleSoft EDI Manager”, “Setting Up Trading Partners”
- “Using PeopleSoft EDI Manager”, “Defining EDI Transactions”
- “Mapping EDI Transactions, “Defining Inbound Maps”
- “Mapping EDI Transactions, “Defining Outbound Maps”
- “Mapping EDI Transactions, “Creating Data Mapping Profiles”

Understanding EDI TS130 Transcript Transactions

Recruiting and Admissions enables you to load external academic transcripts through EDI (Electronic Data Interchange).

To perform EDI TS130 transcript transactions:

1. Process the inbound EC agent.

Specify the location of the file that you want to load into the suspense file on the Schedule Inbound EC Agent page.

2. Load the EDI data for transcript transactions.

Run the TS130 Load process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the **Edit Processing Option** field and click the **Search** button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the **Edit** field of the Process Options page.

4. After you have corrected all of the load errors in the suspense files, run the organization search process.

This process looks for a match of the organization based on the ATP, ACT, FICE, or IPEDS code loaded against the same codes stored on the Organization Table, School Data page. The system compares the EDI School Subject and EDI Course Number on the EDI TS130 Courses page with the school subject and school course number on the School Course Classification page.

5. Resolve and edit any course errors resulting from the organization search process.

In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Access each suspense record and correct the course or organization errors until every suspense record has a value of *Complete* (rather than *Error*) in the Edit field of the Process Options page. If more than one match is found for an organization, the **EDI Org Process Options Search** field will be set to *Error* and the Search/Match results will show the number of schools that matched on the code used as shown. You will need to resolve that error and run the Organization Search process again for the courses to be populated.

This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are actually duplicates.

6. After you have corrected all of the organization and course errors in the suspense files, run the search/match/post process.

This process looks for data in your database (based on search parameters that you defined on the Search/match Parameters page, to include, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are actually duplicates.

7. Check each suspense record that did not get posted to see if it is actually a duplicate.

In the search dialog page of the TS130 Staging component, enter *Complete* in the **Edit Process Option** field and *Perform* in the **Search/Match Process Option** field, and then click the **Search** button. The search process finds only those suspense records that went through the search/match/post process but were not posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match, and then use search/match to look up the bio/demo information that matches the suspense record and decide whether a person who matches the incoming data already exists in the system. Then, specify whether you want the search/match/post

process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record.

8. Run the search/match/post process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Develop Enrollment, Process External Data, Use, Bio/Demo Data. To view a test score record that the search/match/post process created or updated, select **Develop Enrollment > Process External Data > Use > Test Scores**.

Purge TS130 staging table records on the TS130 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your TS130 processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer need to view them.

Related Links

[Purging All EDI Messages](#)

[Tracking Test Results for Prospects and Applicants](#)

[Entering or Updating Applicant Biographical Data](#)

Understanding the EDI Applications and Transcripts Business Process

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

Recruiting and Admissions supports EDI transactions for transcripts and applications. For example, an applicant can fill out an application online using a third-party vendor, which then sends the application electronically to your institution. Additionally, an external institution can electronically send you an applicant's transcripts. In either case, you can load the data from a file into staging tables, review the data, and post it to your database.

The EDI transaction supported for the *transcript* load is the Admissions Transcript Transaction (ADM_TRNS_TS130). The data transmitted through the EDI data load includes personal information, academic status, dates of attendance, session and course information, grades earned, degrees awarded, testing information, and more.

The inbound transaction supported for the *application* load is the Admissions Applicant Transaction (ADM_TRNS_TS189). The data transmitted through the EDI data load includes personal information, names, addresses, residence data, application entry and questions, session and course information, degrees awarded, testing information, and more.

If you receive a transcript or application for a person who does not exist in your database, the system can add the person to your system (depending on the parameters you set up). If the person already exists in your database, the system can update the person's records (depending on the parameters you set up).

The file that you load into EDI Manager is a business document that you receive from an EDI translator. The example setup provided with your system was developed using a Supply Tech business document. Your institution, however, might receive your business document from another EDI translator.

See Also

PeopleTools: Supported Integration Technologies, “Using PeopleSoft EDI Manager”

Setting Up Ethnicity in the System

You must ensure that your system is set up to correctly populate ethnicity information during the TS130 and TS189 posting processes. To do so:

- Change your internal mapping values for ETHNIC_GRP on the Conversion Data Profile page (**PeopleTools > EDI Manager > Convert EDI/PeopleSoft Code > Conversion Data Profile**) for the EDI Convert Profile ID of EDI_CONV.
- Verify that the new values reflect those you defined for ethnic groups on the Ethnic Groups page (**Set Up Common Objects > Product Related > Workforce Administration > Ethnic Groups**).

This is an example of ethnic groups defined on the Conversion Data Profile page:

This is an example of ethnic groups defined on the Conversion Data Profile page.

Conversion Data Profile

Cvt Pro ID: EDI_CONV
 Description: EDI TS130/TS189 Conversn Prof
 Source Profile:

Conversion Find | View All First 10 of 29 Last

*Cvt TypeID: ETHNIC_GRP EDI TS130/TS189 Ethnic Group ☐ Setid Based
☐ No-Value Pass Thru Default Value:

Conversion Values Find | View 3 First 1-8 of 8 Last

Internal Value	Int Deflt	External Value:	Ext Deflt
WHITE	<input type="checkbox"/>	C	<input checked="" type="checkbox"/>
WHITE	<input checked="" type="checkbox"/>	O	<input checked="" type="checkbox"/>
AFRAM	<input checked="" type="checkbox"/>	B	<input checked="" type="checkbox"/>
AFRAM	<input type="checkbox"/>	N	<input checked="" type="checkbox"/>
HISPA	<input checked="" type="checkbox"/>	H	<input checked="" type="checkbox"/>
ASIAN	<input checked="" type="checkbox"/>	A	<input checked="" type="checkbox"/>
AMIND	<input checked="" type="checkbox"/>	I	<input checked="" type="checkbox"/>
NSPEC	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

Processing the Schedule Inbound EC Agent

Use the Schedule Inbound EC Agent (inbound electronic commerce agent) page to specify the location of the file that you want to load into the suspense file. The Schedule Inbound EC Agent (ECIN0001.sqr) process converts the data in the file according to your setup in the EDI Manager. After the process converts the data, it loads it into temporary files until you run the load process.

To process the inbound EC agent for recruiting and admissions transactions:

1. Select **PeopleTools > EDI Manager > Monitor EDI Processing > Schedule Inbound EC Agent**.
2. Select the Single File run option.
3. In the **Single File Path** field, enter the directory path of the file that you want to load.
4. In the **Single File Name** field, enter the name of the file that you want to load.

5. Select *Do Not Force* in the **Force Profile** group box.
6. Clear the check boxes in the **File Options** group box.

See Also

PeopleTools: Supported Integration Technologies, “Using PeopleSoft EDI Manager”

Loading EDI Data for Transcript Transactions

This section discusses how to use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables. You can also elect to create a TS131 acknowledgement file with this process. You send acknowledgement files to the institution that sent you the transcript. It acknowledges the receipt of the transcript and confirms that the institution the transcript was sent to was the institution that received it, and that the information sent is correct. Since you send the acknowledgement file to the institution that sent the transcript, it also confirms for you that the transcript came from the proper office at the institution indicated as the sender and that certain key elements of the transcript were received as they were sent. Before you can create EDI TS131 acknowledgement files, you must define defaults for the acknowledgement files on the TS130/TS131 Setup page.

Related Links

"Defining TS130 and TS131 Controls" (Student Records)

"Reviewing TS130 Outbound Transactions" (Student Records)

Page Used to Load EDI Data for Transcript Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS130 Load Parameters	ADM_TS130_LOD_PARM	Student Admissions > Application/Transcript Loads > TS130 > Load Process	Use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables.

Loading TS130 Transcripts into Staging Tables

Access the EDI TS130 Load Parameters page (**Student Admissions > Application/Transcript Loads > TS130 > Load Process**).

This example illustrates the fields and controls on the TS130 Load Parameters page. You can find definitions for the fields and controls later on this page.

TS130 Load Parameters

Run Control ID: TS130 [Report Manager](#) [Process Monitor](#) Run

'Regulatory Region: United States

☐ Create Acknowledgement (TS131)

Institution: PeopleSoft University

File Name:

Name Prefix Params

Male:

Female:

Unknown:

Name Usage

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

Usage Order	EDI Name Type	
1	<input type="text"/>	

Warning! You should complete the full loading, search/match, and posting processes before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data in your staging files.

Field or Control	Description
Regulatory Region	<p>The system uses the value entered here to populate ethnic group fields during TS130 staging.</p> <hr/> <p>Important! Ensure that the ethnic groups defined on the Conversion Data Profile page match those defined for the regulatory region entered here.</p>
Create Acknowledgement (TS131)	Select to create a TS131 acknowledgement file. The system creates the file according to the standards defined on the TS130/131 Setup page. After the system creates the file, you can send it to the original sending institution to acknowledge receipt of the transcripts.
Institution	Enter your institution code. The system uses the institution code to determine which setup values to use from the TS130/131 Setup page when creating the file.
File Name	Enter the path to where you want the system to write the file, and enter the name of the created file.

Field or Control	Description
Male, Female, and Unknown	<p>An EDI load does not include a person's prefix. It does, however, include gender. In these fields, select the prefix that you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.</p> <p>After you load the data into staging files, you can view the data in the EDI TS130 Staging pages.</p>
EDI Name Type	<p>Select the path to where you want the system to write the file, and enter the name of the created file. Since a transaction can have multiple names for a student, you must indicate which name type to use for the Primary PeopleSoft name. This is the name posted to the NAMES table. Indicate, in hierarchical order, the EDI name types you want to use for this purpose. These are delivered translate values, based on the name types defined in the TS130 Standards documentation. It is important that you enter all EDI name types that you may receive. If a name type is not entered and the student only has that name type, then the student will be loaded with a blank name and the record will display an error.</p>

Click the **Run** button to run the EDI TS130 Transcript Load/Edit process at user-defined intervals.

Reviewing and Editing the EDI TS130 Staging Pages

You can use the EDI TS130 Staging component to review or edit the transcript data that you loaded through the EDI transaction. If you have not run the posting process, any changes you make post to your database when you run the posting process, which means the data posts to the person's record (unless otherwise noted).

The EDI TS130 transcript staging pages are holding tables and are not linked to your database. Personal, organization, and transcript data from these tables post to your database during the posting process, but the data is not shared. In other words, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data, to the Education component, and to the Test Results page. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

You can access the EDI TS130 Staging pages to review the information stored here at any time during the Processing TS130 transcript business process. For example, you might prefer to look at the data immediately after loading it, after running the organization search process, after posting it, or after each of those steps, depending on your procedures.

Note: Be cautious when editing the data in your staging files prior to posting so that you do not inadvertently create duplicate records.

If you find an error in these pages *after* the posting process, you need to go to the applicable page in your application to make any changes.

This section discusses how to review EDI TS130:

- Staging process options.
- Organization staging process options.
- Name data.
- Address data.
- Staging bio/demo data.
- Staging bio/demo (2) data.
- Requirements, attributes, and proficiencies.
- Previous college data.
- Staging organization demographic data.
- Staging academic status data.
- Staging activity data.
- Staging test score data.
- Staging session data.
- Staging academic summary data.
- Staging course data.
- Staging degree data.
- Staging additional information.
- Messages in the staging table.

See Also

The Postsecondary Electronic Standards Council Website

Pages Used to Review and Edit the EDI TS130 Data

Page Name	Definition Name	Navigation	Usage
EDI TS130 Process Options	ADM_TS130_PROC_OPT	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Process Options	Review or edit the process options in your EDI TS130 staging table. This page provides the status of an EDI TS130 transcript record regarding the loading, search/match and posting processes. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors were encountered during the search/match or loading processes.
EDI TS130 Org Process Options (organization process options)	ADM_TS130_ORG_OPT	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Org Process Options	Review or edit the process options for external organization records in your EDI TS130 staging table.
EDI TS130 Names	ADM_TS130_NAMES	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Names	Review or edit the names of applicants loaded through the EDI TS130 data load.
EDI TS130 Addresses	ADM_TS130_ADDR	Student Admissions > Application Transcript Loads > TS130 > TS130 Staging > EDI TS130 Addresses	Review or edit the addresses of applicants loaded through the EDI TS130 data load.
EDI TS130 Bio/Demo (biographical/demographic)	ADM_TS130_BIODEMO1	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Bio/Demo	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.
EDI TS130 Bio/Demo 2 (biographical/demographic 2)	ADM_TS130_BIODEMO2	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Bio/Demo (2)	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.

Page Name	Definition Name	Navigation	Usage
EDI TS130 RAP (requirements, attributes, and proficiencies)	ADM_TS130_RAP	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 RAP	Review or edit transcript degree data loaded through the EDI TS130 data load. Requirement, Attribute, and Proficiency information fall under a session.
EDI TS130 Previous Colleges	ADM_TS130_PCL	Student Admissions > Application Transcript Loads > TS130 > TS130 Staging > EDI TS130 Previous Colleges	Review or edit previous college data loaded through the EDI TS130 data load.
EDI TS130 Org Data (organization data)	ADM_TS130_ORG_DEMO	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Org Data	Review and edit the organization demographic data loaded through the EDI TS130 data load. This page contains data about the external organization that this transcript data is regarding. Organization data does <i>not</i> post to your database.
EDI TS130 Acad Status (academic status)	ADM_TS130_SST	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Acad Status	Review or edit high school academic status data loaded through the EDI TS130 data load. If the organization you are viewing is a high school, this page contains high school academic information about the person in regard to this organization.
EDI TS130 Activities	ADM_TS130_ACTIVITY	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Activities	Review or edit transcript degree data loaded through the EDI TS130 data load. Activity information falls under a session.
EDI TS130 Test Scores	ADM_TS130_TESTS	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Test Scores	Review or edit test score data loaded through the EDI TS130 data load.

Page Name	Definition Name	Navigation	Usage
EDI TS130 Sessions	ADM_TS130_SES	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Sessions	Review or edit transcript session data loaded through the EDI TS130 data load. Multiple sessions can come from one organization. For example, one session could make up the Fall of 9th grade, whereas another session could make up the Spring of 9th grade.
EDI TS130 Academic Summary	ADM_TS130_ACAD_SUM	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Academic Summary	Review or edit academic summary data loaded through the EDI TS130 data load.
EDI TS130 Courses	ADM_TS130_CRS	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Courses	Review or edit transcript course data loaded through the EDI TS130 data load.
TS130 Course Detail	ADM_TS130_CRS_SEC	Click the Course Detail link on the EDI TS130 Courses page.	View additional course information.
EDI TS130 Degrees	ADM_TS130_DEG	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Degrees	Review or edit transcript degree data loaded through the EDI TS130 data load. Degree information falls under a session.
EDI TS130 Additional Info	ADM_TS130_ADDL	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Additional Info	Review or edit additional information loaded through the EDI TS130 data load.
EDI TS130 Messages	ADM_TS130_MSGS	Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Messages	View EDI TS130 processing messages.

Reviewing EDI TS130 Staging Process Options

Access the EDI TS130 Process Options page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Process Options**).

This example illustrates the fields and controls on the EDI TS130 Process Options page. You can find definitions for the fields and controls later on this page.

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	6	In/Out:	Inbound
Cntrl Num:	0965	Dt Loaded:	06/06/2008	Posted Dt:	06/06/2008
Last Name:	Bumble	First Name:	Aaron	Middle Initial:	A
Processing Options					
*Edit:	Complete ▾	*Search:	Complete ▾	*Post:	Purge ▾
Error Indicators					
<input type="checkbox"/> Last Name	<input type="checkbox"/> First Name	<input type="checkbox"/> Test Component	<input type="checkbox"/> Course Error		
Search / Match Results					
Order Nbr:	0	Matches:	0		

Processing Options

Field or Control	Description
Edit	<p>The system displays the status of the load process for this suspense record. The load process populates this value.</p> <p><i>Complete:</i> The load process loaded the transcript data without a problem. This record is ready to be posted.</p> <p><i>Error:</i> The load process encountered problems when loading the transcript data. The system indicates the values that you need to correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to <i>Complete</i>.</p> <p><i>Perform:</i> You set this value manually. It is for informational purposes only.</p>

Field or Control	Description
Search	<p>The system displays the status of the search/match process for this suspense record. The search/match process populates this value.</p> <p><i>Complete:</i> The search/match process posted the transcript data without a problem. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the Bio/Demo page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.</p> <p><i>Error:</i> The search/match process encountered problems when posting the transcript data.</p> <p><i>Perform:</i> The search/match process processes this record the next time you run the process.</p>
Post	<p>The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the following table.</p>

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	<p>The system was unable to find a match in the database and will add a record with a new ID to your database when you run the search/match/post process.</p> <p>When set manually it means that the process identified a match and you determined manually that no duplication exists. When you run the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Bio/Demo page.</p>	<p>Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times).</p> <p>Set manually.</p>
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.

<i>Post Value</i>	<i>Meaning</i>	<i>How Set</i>
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	<p>The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record.</p> <p>When set manually it means that the process identified a match and you determined manually that a duplication exists. The system makes available the ID field on the Bio/Demo page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.</p>	<p>Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times).</p> <p>Set manually.</p>
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note: While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

Error Indicators

<i>Field or Control</i>	<i>Description</i>
Last Name, First Name, Test Component, and Course Error	When a load error occurs, the load external data process selects the required values that were missing or incorrect in the load. Go to the Bio/Demo page, the Tests page, or another page is the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box. After you clear all of the check boxes and save the component, the system enters <i>Complete</i> in the Edit field.

Search/Match Results

<i>Field or Control</i>	<i>Description</i>
Order Nbr	You know that the search/match/post process found a match and did not post the suspense record when the Search field contains <i>Perform</i> and displays the search order number that led to the match in the Order Number field. Use this information to decide whether or not a possible duplication exists.
Matches	The system displays the number of matches the process found at the given order number.

Note: Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Organization Staging Process Options

Access the EDI TS130 Org Process Options page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Org Process Options**).

This example illustrates the fields and controls on the EDI TS130 Org Process Options page. You can find definitions for the fields and controls later on this page.

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names		EDI TS130 Addresses	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound		
Cntrl Num:	0901	Dt Loaded:	10/08/2004				
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N		
External Organizations Find View All First 1 of 1 Last							
Organization							
Description: Landmark College							
Processing Options							
*Edit: Complete		*Search: Complete		*Post: Update ID			
Search / Match Results							
Matches: 1							

This page provides the status of EDI TS130 transcript organization data regarding the loading, search/match and posting processes. You can determine if an external organization record is waiting to be processed, if the person linked to this organization record instigated a new ID to be added to your database, or if any errors were encountered during the search/match or loading processes.

When organization data comes in with an EDI load, the system does not create new organizations in your database. During the Organization Search process, the system searches through your database to find a *matching* external organization for the organization data that comes in. Therefore, the organization must already exist in your database for this transcript data to process. An error occurs if the process does not find a matching organization.

Organization data is linked to a personal EDI TS130 record. The organization controls the transcript information related to the person linked to this record. The system does not process the organization data until you process the matching personal record.

Processing Options

Field or Control	Description
Edit	<p>The system displays the status of the load process for this organization suspense record. The load process populates this value.</p> <p><i>Complete:</i> The load process loaded the organization data without a problem. This record is ready to be posted.</p> <p><i>Error:</i> The load process encountered problems when loading the organization data. View details about the error on the EDI TS130 Messages page. Correct all errors and save the data before running the search/match/post process on this record.</p> <p>After you correct the errors and save the component, the system changes the field value to <i>Complete</i>.</p> <p><i>Perform:</i> You set this value manually. This is for informational purposes only.</p>
Search	<p>The system displays the status of the search/match process for this suspense record. The search/match process populates this value.</p> <p><i>Complete:</i> The search/match process posted the organization data without a problem.</p> <p><i>Error:</i> The search/match process encountered problems when posting the organization data.</p> <p><i>Perform:</i> The search/match process processes this record the next time you run the process.</p>
Post	<p>The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the following table.</p>

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.

Post Value	Meaning	How Set
New ID Add	The system was unable to find a match for this organization in your database. To post data for this person regarding this organization, you must manually enter a valid organization ID on the EDI TS130 Org Data page.	Set by the system during the search/match process if no matching organization was found in your database.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	The system found a matching organization ID in the database. Consequently, data from this organization for this person can be updated.	Set by the system during the search/match process if a matching organization was found in the database.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note: While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

Search/Match Results

Field or Control	Description
Matches	The system displays number of external organization matches found in your database for this record.

Note: Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Name Data

Access the EDI TS130 Names page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Names**).

This example illustrates the fields and controls on the EDI TS130 Names page. You can find definitions for the fields and controls later on this page.

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names		EDI TS130 Addresses							
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound								
Cntrl Num:	0901	Dt Loaded:	10/08/2004										
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N								
<div> <div>Name Type</div> <div>Find View All First 1 of 1 Last</div> <div>Given Name (Name at Birth)</div> </div> <div> <div>Name Components</div> <div>Find View All First 1-3 of 3 Last</div> <table> <tr> <td>First</td> <td>MELISSA</td> </tr> <tr> <td>Last</td> <td>HARRIS</td> </tr> <tr> <td>Middle</td> <td>N</td> </tr> </table> </div>								First	MELISSA	Last	HARRIS	Middle	N
First	MELISSA												
Last	HARRIS												
Middle	N												

View all the names parts loaded for the student by name type. The name appearing at the top of the page is the name that will be posted to the NAMES record. This name was determined by the Name types you entered on the TS130 Load Parameters page.

Reviewing EDI TS130 Address Data

Access the EDI TS130 Addresses page (**Student Admissions > Application Transcript Loads > TS130 > TS130 Staging > EDI TS130 Addresses**).

This example illustrates the fields and controls on the EDI TS130 Addresses page. You can find definitions for the fields and controls later on this page.

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names		EDI TS130 Addresses										
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound											
Cntrl Num:	0901	Dt Loaded:	10/08/2004													
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N											
<div> <div>Addresses</div> <div>Find View All First 1 of 1 Last</div> <div> <div>Name Type: Given Name (Name at Birth)</div> <div>Find View All First 1-3 of 3 Last</div> <table> <tr> <td>Address Type:</td> <td>Home</td> <td>Address</td> </tr> <tr> <td>Address Type:</td> <td>Mailing</td> <td>Address</td> </tr> <tr> <td>Address Type:</td> <td>Permanent</td> <td>Address</td> </tr> </table> </div> </div>								Address Type:	Home	Address	Address Type:	Mailing	Address	Address Type:	Permanent	Address
Address Type:	Home	Address														
Address Type:	Mailing	Address														
Address Type:	Permanent	Address														

View the address types loaded for the student. Click the **Address** button to access the TS130 Address, where you can view the address loaded through the TS130 Load process. You can also click the **Edit Address** link on the TS130 Address page to edit address data. If a new record is created when you post EDI TS130 data, address information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record.

Reviewing EDI TS130 Staging Bio/Demo Data

Access the EDI TS130 Bio/Demo page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Bio/Demo**).

This example illustrates the fields and controls on the EDI TS130 Bio/Demo page. You can find definitions for the fields and controls later on this page.

EDI TS130 Names

EDI TS130 Addresses

EDI TS130 Bio/Demo

EDI TS130 Bio/Demo (2)

EDI TS130 RAP

Trans ID:

ADM_TRNS_TS130

Queue Inst:

1

In/Out:

Inbound

Cntrl Num:

0901

Dt Loaded:

10/08/2004

Middle Initial:

N

Last Name:

Harris

First Name:

Melissa

Bio/Demo Data

ID:

SSN:

XXX-XX-XXXX

Date of Birth:

07/04/1983

Birth Location:

CHICAGO

Birth Country:

USA

United States

Birth State:

IL

Illinois

Reference Numbers

Find | View All

First

1 of 1

Last

Ref Nbr

PIN

Number:

0543

Qualifier:

The EDI TS130 Bio/Demo page contains biographical and demographic data for the person from the EDI TS130 transcript load.

If the system creates a new record when you post EDI TS130 data, the system uses personal information from this page to populate the new record. If the system finds a matching record in your database this EDI TS130 personal data does *not* overwrite any bio/demo data in the existing record, even if you have specified that matching records should be updated with EDI TS130 data. To protect verified information, the system never updates bio/demo data through external data loads.

If you have not run the posting process and you edit the data on this page, then the edited data posts to the person's record when you post the data.

Field or Control	Description
ID	<p>After the load process runs, this field is display-only and is empty. After the search/match process runs this field is accessible and contains the ID of the person in your database if a match was found, or <i>NEW</i> if a new record will be added during the posting process. After the posting process runs, this field is display-only and displays the ID of the person in your database to whom this EDI data posted.</p> <p>This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here if the process created a new record.</p> <p>If the process finds a match and updates an existing record, the process enters the ID of the record that it updated.</p> <p>If the process finds a match and dumps the record into the suspense table, and you decide to update an existing ID (by selecting <i>Update ID</i> in the Post field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.</p>
Ref Nbr Qualifier (reference number qualifier)	The type of reference number indicated in the EDI TS130 load for this person.
Number (reference number)	The actual reference number from the EDI TS130 load.

Reviewing EDI TS130 Staging Bio/Demo (2) Data

Access the EDI TS130 Bio/Demo (2) page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Bio/Demo (2)**).

This example illustrates the fields and controls on the EDI TS130 Bio/Demo (2) page. You can find definitions for the fields and controls later on this page.

<div> EDI TS130 Names EDI TS130 Addresses EDI TS130 Bio/Demo EDI TS130 Bio/Demo (2) EDI TS130 RAP </div>			
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1
Cntrl Num:	0901	Dt Loaded:	10/08/2004
Last Name:	Harris	First Name:	Melissa
		Middle Initial:	N
Bio/Demo Data			
Citizen Country:	USA	United States	
Citizenship Status:	1	Native	
Gender:	Female		
Name Prefix:	Ms		
Marital Status:	Unknown		
Ethnic Group:	Black		
Highest Education Level:	Not Indic		
<input type="checkbox"/> Disabled <input type="checkbox"/> Full-Time Student			

If a new record is created when you post EDI TS130 data, personal information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record. If you have not run the posting process and you edit the data on this page, the edited data posts to the person's record when you post the data.

Field or Control	Description
Disabled	The system selects this check box if the record indicates that the person is disabled.
Full-Time Student	The system selects this check box if the record indicates that the person is a full-time student.

Reviewing EDI TS130 Requirements, Attributes, and Proficiencies

Access the EDI TS130 RAP page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 RAP**).

Field or Control	Description
Test/Requirement Code	Indicates a particular national, regional, state, or local requirement for a course.
Description 1	Specifies the <i>main</i> category of the requirement, attribute, or proficiency.
Description 2	Specifies the <i>lesser</i> category of the requirement, attribute, or proficiency.
Usage Indicator	Designates the achievement or characteristic being described as a requirement, an attribute, or a proficiency. Possible values are <i>Attribute</i> , <i>Prfncy</i> (proficiency), and <i>Reqmn</i> (requirement).
Condition or Response Code	If selected, indicates that the student or course meets the requirement, attribute, or proficiency.

Reviewing EDI TS130 Previous College Data

Access the EDI TS130 Previous College(s) page (**Student Admissions > Application Transcript Loads > TS130 > TS130 Staging > EDI TS130 Previous College(s)**).

This example illustrates the fields and controls on the EDI TS130 Previous College(s) page. You can find definitions for the fields and controls later on this page.

EDI TS130 RAP				EDI TS130 Previous College(s)				EDI TS130 Org Data				EDI TS130 Acad Status			
Trans ID:		ADM_TRNS_TS130		Queue Inst:		1		In/Out:		Inbound					
Cntrl Num:		0901		Dt Loaded:		10/08/2004									
Last Name:		Harris		First Name:		Melissa		Middle Initial:		N					
Previous College Find View All First 1 of 1 Last															
Institution Code Qualifier:		98													
Institution Code:		456389475-B													
Begin Date:		09/10/2001													
End Date:		06/06/2002													
Degree:		CERT Certificate													
Degree Date:		6/6/2002													
Previous Institution Name:		Carlson Community College													

View previous colleges supplied by the sending institution on this page. Information includes the institution name, the begin and end dates, as well as degree data. This data is informational only and not posted to the Education component.

Reviewing EDI TS130 Staging Organization Demographic Data

Access the EDI TS130 Org Data page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Org Data**).

This example illustrates the fields and controls on the EDI TS130 Org Data page. You can find definitions for the fields and controls later on this page.

EDI TS130 RAP				EDI TS130 Previous College(s)				EDI TS130 Org Data				EDI TS130 Acad Status			
Trans ID:		ADM_TRNS_TS130		Queue Inst:		1		In/Out:		Inbound					
Cntrl Num:		0901		Dt Loaded:		10/08/2004									
Last Name:		Harris		First Name:		Melissa		Middle Initial:		N					
External Organization Find View All First 1 of 1 Last															
Description:		Carlson College													
*Organization Type:		School													
External Org ID:		000010092 Landmark College													
Term Type:		Quarter													
External Career:		Undergrad													
*Inbound School Type:		AS Post-Secondary Record Sender													
ACT Code:				ATP Code:		ATP									
FICE Code:				IPEDS Code:											
Save		Return to Search		Next in List		Previous in List		Notify							

Note: An organization must exist in your database for transcript data from that organization to post to your database. If the organization search process resulted in multiple or no matches, you need to manually choose an organization ID on this page. If the organization does not exist in your database, you need to add a new organization to your database and then return to this page and insert the new ID. The organization search process must be run again to process the courses for the new external organization once it is entered on this page.

Field or Control	Description
Description	The descriptive name of this external organization as provided in the EDI load.
Organization Type	The type of external organization (such as <i>School</i>). Values for this field are delivered with your system as translate values. You can modify these translate values.
External Org ID (external organization ID)	<p>If the organization search process found a match for this organization in your database, its ID appears. If more than one or no potential match is found during the organization search process, <i>Error</i> appears in the Search field of the Org Process Options page. In such a case, an organization does not appear in this page. To investigate the reason for the error, go to the EDI TS130 Staging - Messages page. If no match is found, you must manually choose the appropriate organization ID. If the organization does not exist, you need to add it to your database and then return to this page to select the new ID.</p> <p>See "Understanding Organizations" (Campus Community Fundamentals)</p>
Term Type	The type of term used by this external organization.
External Career	The external career for this organization. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Graduate</i> , <i>High School</i> , <i>Law</i> , <i>Medical</i> , and <i>Undergraduate</i> .
Inbound School Type	The EDI school type for this external organization comes from the EDI record. Its description appears next to the field.
ACT Code, ATP Code, FICE Code, and IPEDS Code	The ACT code, ATP code, FICE code, and IPEDS code appear. The organization search process uses these codes to search for a matching external organization in the database.
Organization Address	Click this button to access address information for this external organization.

Reviewing EDI TS130 Staging Academic Status Data

Access the EDI TS130 Acad Status page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Acad Status**).

This example illustrates the fields and controls on the EDI TS130 Acad Status page. You can find definitions for the fields and controls later on this page.

EDI TS130 RAP				EDI TS130 Previous College(s)		EDI TS130 Org Data		EDI TS130 Acad Status	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound				
Cntrl Num:	0901	Dt Loaded:	10/08/2004						
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N				
Academic Status Find View All First 1 of 1 Last									
HS Grad Type:	HS Diploma		Graduation Date:	06/01/2001					
Eligbl to Rtrn:	Expelled		Return Date:	10/10/2004					
Enroll Status:	B31		Currently Enrolled						
Residency:	Yes								
Entry and Exit Information Find View All First 1 of 1 Last									
SSE Nbr:									
Entry Date:									
Exit Date:									

View additional information about the student's attendance at the organization listed on the EDI TS130 Org Data page. After you post the EDI TS130 data, you can view transcript data for this person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Activity Data

Access the EDI TS130 Activities page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Activities**).

This example illustrates the fields and controls on the EDI TS130 Activities page. You can find definitions for the fields and controls later on this page.

EDI TS130 Org Data		EDI TS130 Acad Status		EDI TS130 Activities		EDI TS130 Test Scores		EDI TS130 Sessions	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound				
Cntrl Num:	0901	Dt Loaded:	10/08/2004						
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N				
Activities Find View All First 1 of 1 Last									
Qualifier Code:	Activ Cd								
Activity/Award Code:									
Description:									

Field or Control	Description
Qualifier Code	Identifies a specific industry code list, such as <i>Activ Cd</i> (activity code) or <i>Award Cd</i> (award code).

Note: You can view activity code information on the Extracurricular Activities page and award code information on the Honors/Awards page after the person becomes a prospect or applicant and the data is posted to the database.

Reviewing EDI TS130 Staging Test Score Data

Access the EDI TS130 Test Scores page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Test Scores**).

This example illustrates the fields and controls on the EDI TS130 Test Scores page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'EDI TS130 Test Scores' page. At the top, there are tabs for 'EDI TS130 Org Data', 'EDI TS130 Acad Status', 'EDI TS130 Activities', 'EDI TS130 Test Scores' (selected), and 'EDI TS130 Sessions'. Below the tabs, there is a form with the following fields:

- Trans ID:** ADM_TRNS_TS130
- Queue Inst:** 1
- In/Out:** Inbound
- Cntrl Num:** 0901
- Dt Loaded:** 10/08/2004
- Last Name:** Harris
- First Name:** Melissa
- Middle Initial:** N

Below these fields is a section titled 'Test Score Data' with a search bar and navigation buttons. It contains the following fields:

- *Test ID:** SATII
- Test Date:** 03/11/2002
- Test Date Error:** (checkbox)
- Acad Level:** 12th Grade
- Test Level:** SAT II

Below the 'Test Score Data' section is a table titled 'Test Component' with the following columns: Component, Subtest, Score, Percentile, Post, and Error. The table contains one row:

Component	Subtest	Score	Percentile	Post	Error
EN English Composition	00001	500.00	95	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Field or Control	Description
Test ID	The ID of the test taken by this person. Define test IDs on the Test Tables page.
Test Date	The PeopleSoft standard date format as translated from the EDI test date.
Test Date Error	The system selects this check box if it detected an error on the test date.
Test Level	A free-form text description of the level of the test for cases in which there are multiple levels to a test. For example, for the International Baccalaureate Test, "H" represents the higher level and "S" represents the subsidiary level.
Component	The system translates the test component to your institution component code by matching the subtest code delivered with the EDI load and the subtest code on the Test Tables page.
Subtest (subtest code)	The test component code from the EDI record. A corresponding subtest code must be defined for the test component on the Test Table for the test component to be populated during the TS130 load process.

Field or Control	Description
Score	The reported score from the EDI load.
Post	The system selects this check box if the component will be posted to your database.
Error	The system selects this check box if it detected an error on the test component.

Note: You can view the test results posted for a person through the Academic Test Summary page or the Test Results page.

Reviewing EDI TS130 Staging Session Data

Access the EDI TS130 Sessions page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Sessions**).

This example illustrates the fields and controls on the EDI TS130 Sessions page. You can find definitions for the fields and controls later on this page.

The screenshot shows the EDI TS130 Sessions page with the following details:

- Trans ID:** ADM_TRNS_TS130
- Queue Inst:** 1
- In/Out:** Inbound
- Cntrl Num:** 0901
- Dt Loaded:** 10/08/2004
- Last Name:** Harris
- First Name:** Melissa
- Middle Initial:** N

Session Data

- Session Number:** 1
- Term Type:** Quarter
- Career:** High Schl
- Ext Term:** SPR
- Acad Level:** 10th Grade
- Term Year:** 2001

Dates of Attendance

- From Date:** 07/02/2001
- To Date:** 09/19/2001

Transcript

- Certificate Received Date:** 10/08/2004
- Data Medium:** EDI

Field or Control	Description
Term Type	The term type used by this external organization. Values for this field are delivered with your system as translate values. You can modify these translate values.
Career	The external career to which this transcript session pertains. Values for this field are delivered with your system as translate values. You can modify these translate values.

Field or Control	Description
Ext Term (external term)	The actual external term that this data applies to (such as <i>FALL</i> or <i>SPRING</i>). The values available to you in this field depend on what you entered in the Term Type field. Define external terms on the External Term Table page.
Acad Level (academic level)	The academic level of the person at the time this data was collected or issued. Values for this field are delivered with your system as translate values. You can modify these translate values. Examples of the values are <i>10th Grade</i> , <i>11th Grade</i> , <i>Freshman</i> , and <i>Postdoctoral</i> .
Term Year	The term year relevant to this session.
From Date and To Date	The first and last date that the applicant attended this school for this session.
Certificate Received Date	The date that you ran the EC Inbound Agent process.
Data Medium	The data medium default for this session is <i>EDI</i> . Values for this field are delivered with your system as translate values. You can modify these translate values.

Reviewing EDI TS130 Staging Academic Summary Data

Access the EDI TS130 Academic Summary page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Academic Summary**).

This example illustrates the fields and controls on the EDI TS130 Academic Summary page . You can find definitions for the fields and controls later on this page.

The screenshot displays the EDI TS130 Academic Summary page. At the top, there are navigation tabs: EDI TS130 Test Scores, EDI TS130 Sessions, EDI TS130 Academic Summary (selected), EDI TS130 Courses, and EDI TS130 Degrees. Below the tabs, the following information is displayed:

Trans ID: ADM_TRNS_TS130 **Queue Inst:** 1 **In/Out:** Inbound
Cntrl Num: 0901 **Dt Loaded:** 10/08/2004
Last Name: Harris **First Name:** Melissa **Middle Initial:** N

Below this, there is a section titled **Academic Summary** with a search bar and navigation controls (Find, View All, First, 1 of 1, Last). The session details are as follows:

Session Number: 1 **From Date:** 07/02/2001 **To Date:** 09/19/2001

Below the session details, there is a table with two columns for various academic metrics:

Unit Type: Quarter	Course Level: Regular
External GPA: 3.000	Cumulative: N
Completed: 5.00	Attempted: 5.00
Class Size:	Class Rank:
Hours Earned:	

View academic data specific to the session listed for the student. This data will include grade point average (GPA), units attempted and completed, as well as class rank information. If an *N* appears in the **Cumulative** field, the data shown is specific to the session listed. If a *Y* appears in the **Cumulative** field,

the data is cumulative to show overall academic statistics as of the end of the session listed. The latest cumulative information is posted to the academic summary section of the Education component during the search/match/post process.

Reviewing EDI TS130 Staging Course Data

Access the EDI TS130 Courses page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Courses**).

This example illustrates the fields and controls on the EDI TS130 Courses page. You can find definitions for the fields and controls later on this page.

The screenshot displays the EDI TS130 Courses page with the following fields and controls:

- Trans ID:** ADM_TRNS_TS130
- Queue Inst:** 1
- In/Out:** Inbound
- Cntrl Num:** 0901
- Dt Loaded:** 10/08/2004
- Last Name:** Harris
- First Name:** Melissa
- Middle Initial:** N

Course Data section:

- Session Number:** 1
- From Date:** 07/02/2001
- To Date:** 09/19/2001
- External Course Number:** 1
- School Subject:** MATH (with a search icon)
- Course Nbr:** 105 (with a search icon)
- EDI School Subject:** MATH
- Inbound Course Number:** 105
- EDI External Course Type:** Regular Enrollment (dropdown menu)
- Course Level:** Regular (dropdown menu)
- Units Taken:** 5.00
- Grd In/Official:** (checkbox)

Additional controls include checkboxes for **Crse Error** and **Course Post**, and a **Course Detail** button.

The Org Search Process finds course matches based on the EDI School Subject and EDI Course Number. The EDI fields are compared against the School Subject and School Course Number defined for the Organization on the School Course Classification page. If a match is found, the School Subject, Course Number and Description from the School Course Classification Table are populated on EDI TS130 Courses and the Course Post flag is set to Y. If a match is not found based on the Subject and Number during the Org Search Process, the Edit Process Option will be set to Error and the Course Error flag will be set to Yes on the EDI TS130 Process Options page.

You can choose to post the course without having a match. The error flag will not be set on the course and you are able to select Course Post which allows the course to be posted to External Course instead of having to manually data enter the course. You can select the School Subject and Course Nbr prompts to search for an appropriate course or leave the fields populated as they are. If you determine you want this course to be posted even though a match was not found, select Course Post and Save. If you select Course Post for all the courses that did not find a match and save, the Edit Process Option on EDI TS130 Process Options will automatically change from Error to Complete. If you decide not to post one or more courses, you will need to manually go change the Edit Process Option to Complete in order for the transcript to be posted.

Field or Control	Description
External Course Number	The sequential number of this row of course data. The first data item (or row) loaded is 1. The next row is 2. Courses fall under a session.
Crse Error (course error)	The system selects the course error display-only check box if there was an error during the posting process. For example, the system selects this check box if it fails to find a matching course for the course loaded through the EDI load. See the Messages page for more information on this error.
Course Post	The system selects this check box if this course will be posted to your database.
School Subject	If the system finds an external subject area on the School Course Classification page for this school that matches the external subject area loaded through the EDI load, it populates the subject area from the School Course Classification page here. If it does not find a match, it populates the value from the External Subject Area field here, and selects the Crse Error check box. The system compares the subject areas when you post the record.
Course Nbr (course number)	If the system finds a course description and external subject area on the School Course Classification page that matches the description of the EDI course number and the external subject area from the load, it populates the course number here, and the description in the field to the right. If it does not find a match, the system leaves this field blank and selects the Crse Error check box. The system compares the course descriptions when you post the record.
Career	The external career comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.
EDI School Subject	The external subject area loaded from the EDI load. When you post this record the system compares this value to the external subject areas and course descriptions set up for this external organization on the School Course Classification page. If it finds a match it populates the School Subject field with the corresponding subject area from the School Course Classification page. If it does not find a match the system populates the School Subject field with the value in this field. The description appears next to the field.

Field or Control	Description
EDI Course Number	<p>The course number loaded from the EDI load. The description from the EDI load appears next to this course field. When you post this record the system compares the description of the EDI course number and the external subject area to the course descriptions and external subject areas set up for this external organization on the School Course Classification page. If it finds a match it populates the Course Nbr field with the corresponding course number from the School Course Classification page. If it does not find a match the system leaves the Course Nbr field blank and selects the Crse Error check box.</p> <p>The Description field is display-only if a match is found from your School Course Classification setup. If a match is not found, you can edit the Description field.</p>
EDI External Course Type	<p>The external course type defining this course, such as <i>Course</i> and <i>Event</i>. External Course Type comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.</p>
Course Level	<p>The course level comes from the EDI load. This course could be described, for example, as an <i>Honors</i>, <i>AP</i>, or <i>Regular</i> course. Values for this field are delivered with your system as translate values. You can modify these translate values.</p>
Units Taken	<p>The number of units taken for this course.</p>
Grd In/Official (grade in/official)	<p>The grade information for this course.</p>
Course Detail	<p>Click this button to view additional data regarding this course.</p>

Note: View transcript data posted through the EDI load for a person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Degree Data

Access the EDI TS130 Degrees page (**Student Admissions** > **Application/Transcript Loads** > **TS130** > **TS130 Staging** > **EDI TS130 Degrees**).

This example illustrates the fields and controls on the EDI TS130 Degrees page. You can find definitions for the fields and controls later on this page.

EDI TS130 Test Scores

EDI TS130 Sessions

EDI TS130 Academic Summary

EDI TS130 Courses

EDI TS130 Degrees

Trans ID:ADM_TRNS_TS130

Queue Inst:1

In/Out:Inbound

Cntrl Num:0901

Dt Loaded:10/08/2004

Last Name:Harris

First Name:Melissa

Middle Initial:N

Find | View All

First

1 of 1

Last

Session Number:

From Date:

To Date:

Find | View All

First

1 of 1

Last

Degree Nbr:

Degree Date:

31

Degree:

Description:

Honors Category:

Degree Status:Complete

Field of Study 1:

Field of Study 2:

Field or Control	Description
Degree Nbr (degree number)	Displays the sequential number of this row of degree data. The first data item (or row) loaded is 1 and the next row is 2.
Degree Date	The date the student received or will receive this degree.
Honors Category	Honors the person received for this degree (if applicable). Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are <i>Cum Laude</i> , <i>Magna Cum Laude</i> , <i>None</i> , and <i>Summa Cum Laude</i> .
Field of Study 1 and Field of Study 2	The particular subject areas or concentrations for this degree (if applicable).

Note: You can view the degree data posted for a person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Additional Information

Access the EDI TS130 Additional Info page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Additional Info**).

This example illustrates the fields and controls on the EDI TS130 Additional Info page. You can find definitions for the fields and controls later on this page.

EDI TS130 Academic Summary		EDI TS130 Courses		EDI TS130 Degrees		EDI TS130 Additional Info		EDI TS130 Messages	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound				
Cntrl Num:	0901	Dt Loaded:	10/08/2004						
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N				
Additional Information									
EDI Trans Type:	Original	Transaction Type:	Postsec						
Ref Nbr Qual:	SY	Status Reason:	B48						
Unit Type:	Q	Reference Number:	900836286						
Cumulative:	Y	Course Level:	U						
Attempted:	5.00	External GPA:	3.000						
Class Rank:		Completed:	5.00						
Hours Earned:	5.000000	Class Size:							
Name Component:	05	Date Time Period:							
Name:	HARRIS								

Field or Control	Description
EDI Trans Type	The purpose of the transaction. Values are <i>Original</i> , <i>Replace</i> , <i>Duplicate</i> , <i>Response</i> , <i>Re-Submission</i> , <i>Confirmation</i> , and <i>Mutually Defined</i> .
Transaction Type	The type or transcript or student record being sent. Values are <i>District</i> or <i>Postsecondary</i> .
Ref Nbr Qual (reference number qualifier)	A code identifying the type of student identification being sent in the Reference Number field. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Status Reason	The reason the transcript or student record is being sent. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Unit Type	The external unit type from the last SUM loop transmitted for the student indicating the type of credit used by the sending institution. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Reference Number	The reference information as defined by the reference identification qualifier field.
Cumulative	An indicator of whether or not the data on this page is a summary or all work included in the record. A <i>Y</i> in the field indicates the data is cumulative.

Field or Control	Description
Course Level	The level of work that is reflected in the GPA and hours on this page. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Attempted	The total number of units the student attempted on this record as transmitted in the last SUM loop of the record.
External GPA (external grade point average)	The GPA for the student as transmitted in the last SUM loop of the record.
Class Rank	The class rank of the student as transmitted in the last SUM loop of the record.
Completed	The total number of units the student attempted and earned on this record as transmitted in the last SUM loop of the record
Hours Earned	The total number of hours included in the GPA for this summary as transmitted in the last SUM loop of the record.
Class Size	The total number of student in the class to help position the student's rank as transmitted in the last SUM loop of the record.
Name Component	The code identifying the type of name component. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Date Time Period	The date the class rank was determined.
Name	The free-form text of the name component or the full name as indicated in the name component field.

Reviewing EDI TS130 Messages in the Staging Table

Access the EDI TS130 Messages page (**Student Admissions > Application/Transcript Loads > TS130 > TS130 Staging > EDI TS130 Messages**).

This example illustrates the fields and controls on the EDI TS130 Messages page. You can find definitions for the fields and controls later on this page.

EDI TS130 Academic Summary			EDI TS130 Courses			EDI TS130 Degrees			EDI TS130 Additional Info			EDI TS130 Messages		
Trans ID:	ADM_TRNS_TS130			Queue Inst:	1			In/Out:	Inbound					
Cntrl Num:	0901			Dt Loaded:	10/08/2004									
Last Name:	Harris			First Name:	Melissa			Middle Initial:	N					
Find View All												First	1 of 2	Last
Run Date/Time:	10/08/2004 2:26:18PM						Process Instance:	195						
User ID:	PS						Process Name:	ADTRNSRC						
Message Set Number:	14200						Message Number:	143						
Message Severity:	Message													
Message Text:	External Organization is new or an update or is a delete.													
Description:	See the comments below to verify.													
Comments:	The record has been determined to be a(n) UPDATE and the number of matches is 1.													

Any informational and error messages that the EDI TS130 load, organization search, search/match, or posting processes generates appear on this page. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your EDI processing. To do such an analysis, you would need to wait to purge your EDI messages until you have completed your analysis.

You can also look to these messages to ascertain any changes you want to make to your staging data before posting it to your database.

Field or Control	Description
Run Date/Time	The day and time the last process ran for this record.
Process Instance	The process number of the last process run for this record.
User ID	The user ID of the person who ran the last process for this person.
Process Name	The name of the last SQR run for this record. For example, in the previous page example, the last SQR run was ADTRNPST. SQR (the load process).
Message Set Number and Message Number	The message set number and message number, which come from the message catalog.
Message Severity	The message severity (such as <i>Message</i> or <i>Error</i>).
Message Text	The actual message on this row of data.
Description	Details about the message in the Message Text area.

Field or Control	Description
Comments	Results or other additional information about the message.

Using the Organization Search Process

This section provides an overview of the organization search process and lists the page used to run the Organization Search process.

After you have loaded the TS130 data and corrected any error resulting from the load process, run the organization search process to match the organization and course data.

When you click the Run button, the Organization Search process does the following: Uses the FICE, ATP, ACT, or IPEDS code found on the EDI TS130 Staging, EDI TS130 Org Data page to find a match to the same codes stored on the Organization Table, School Data page. If a match is found, the system populates the **Ext Org ID**, **Term Type**, and **External Career** fields on the EDI TS130 Org Data page.

The **Term Type** and **External Career** fields will only be populated if the system defaults for those fields are populated on the Organization Table, School Data page.

The system updates the EDI TS130 Courses page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Courses) based on the search process. The system compares the **EDI School Subject** and **EDI Course Number** fields on the EDI TS130 Courses page with the school subject and school course number on the School Course Classification page (Campus Community, Organization, Create/Maintain Organizations, School Course Classification).

If the system finds a match, it sets the course to Course Post. If the system does not find a match, it sets the Crse Error (course error) flag for the course and also sets it on the EDI TS130 Staging, EDI TS130 Process Options page.

To post the course as it is, select the **Course Post** check box and save the page. If you post all of the courses for which no match was found, the **Edit Process Option** field on the EDI TS130 Process Options page automatically changes from *Error* to *Complete*. If you decide not to post one or more courses, you must manually change the **Edit Process Option** field to *Complete* in order for the transcript to be posted.

To rectify a course error:

1. Clear the **Course Nbr** (course number) field
2. Press **TAB**.
3. Click the prompt to select the appropriate course.

The system clears the **Crse Error** check box, but you must select **Course Post** to post the course. The appropriate courses do not appear if you do not press **TAB** before selecting the course number prompt. You must return to TS130 staging and correct the errors before posting the data.

Page Used to Run the Organization Search Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS130 Org Search (organization search)	ADM_TS130_ORG_PARM	Student Admissions > Application/Transcript Loads > TS130 > Organization Search Process	Run the process to match organization and course data from the transmitted student record.

Setting Up TS130 Search/Match/Post Parameters, and Processing and Posting the EDI Staging Files

After you have reviewed the staging tables, specify on the Search Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the EDI TS130 data, and then you can run both processes at once: to search for matching people in your database and to post the external EDI TS130 data according to the parameters you set up. The EDI TS130 Post process contains logic to prevent the posting of duplicate data in the following areas: External data and external academic summary. The following fields are used to determine if a new row should be added to external data and external academic summary during the process: **EmplID, External Organization ID, Career, Data Source, Transcript Type, Transcript Status, Academic Level, From Date, and To Date**. If the session data on the EDI TS130 staging matches the data on the External Education page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15), or Reissue (18). In this case, the existing data is updated with the new data. If the data does not match, a new row is added.

External degree: The following fields are used to determine if an external degree should be added during the process: **EmplID, External Org ID, External Career, Data Source, Degree Status, Degree Date, and Degree**. If the degree data on EDI TS130 staging matches the data on the Courses and Degrees page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15), or Reissue (18). If the data matches and the transaction type is one of these values, the existing data is updated with the new data. If the data does not match, a new row is added.

External courses. The following fields are used to determine if an external course should be added during the process: **EmplID, External Org ID, Data Source, School Subject, Course Number, Begin Date and End Date, and Grade In**. If the course data on EDI TS130 Staging matches the data on the Courses and Degrees page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15), or Reissue (18). If the data matches and the transaction type is one of these values, the existing data is updated with the new data. Additionally, if the **Grade In** field on the Courses and Degrees page is blank and the remaining data matches, the **Grade In** field will be updated with the grade from EDI TS130 Staging. If the data does not match, a new row is added.

This section discusses how to:

- Set up search/match parameters.

- Post the EDI TS130 external data.
- Establish address types.

Note: The recommended option is to select the **Search, Match, and Post** option to search for matching people in your database and post the EDI TS130 data to the database in one step.

Pages Used to Set Up TS130 Search/Match/Post Parameters, Process, and Post the EDI Staging Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search Parms	SEARCH_PARMS	Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Search Parms	Set up your search/match parameters for processing the EDI TS130 transcript staging table.
Post Parameters	ADM_TS130_PST_PARM	Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Post Parameters > ADM TS130 Post Parm	Set up post parameters and to post EDI TS130 transcript data. You can post a single record or all records in the staging table.
Post Parameters	ADM_TS130_PST_PRM2	Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Post Parameters > ADM TS130 Post Parm 2	Set up your address type for the search/match process.

Setting Up Search/Match Parameters

Access the Search Parms page (**Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Search Parms**).

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

ADM TS130 Post Parm
ADM TS130 Post Parm 2
Search Params

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

*Search Parameter: CS_Person_Traditional

No Match Found

	Add	Update	Suspend	Ignore
New:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Match(es) Found
[Find](#) | [View All](#)
1-2 of 5

Order Nbr: 10	Name,Addr,City,Bday,Gender,SSN	*****Parameters Refreshed*****		
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<hr/>				
Order Nbr: 20	SSN Only			
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Note: The words *Parameters Refreshed* appear if this is the first time you have entered this page with this run control ID, or if any of the parameters on this page changed since the last time you accessed this page with this run control ID.

No Matches Found

Field or Control	Description
New	<p>Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database.</p> <p><i>Add:</i> Add the unmatched record to your database, including personal data.</p> <p><i>Suspend:</i> Keep the unmatched record in the suspense file to be looked at manually.</p> <p><i>Ignore:</i> Ignore the unmatched record completely. The process marks the record to be purged.</p>

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Field or Control	Description
Order Nbr (order number)	For each order number, select what you want to do with the EDI record if the search/match/post process discovers one or more matching records.
One Match and Multiple Matches	<p>Select whether you want to add, update, suspend, or ignore matching records.</p> <p><i>Add:</i> Add a new record to your database using the suspense record.</p> <p><i>Update:</i> Update the existing record with the data in the suspense record. Remember, the process does not update bio/demo data.</p> <p><i>Suspend:</i> Keep the suspense record back in the suspense table. You need to determine manually whether or not this record matches a record in your database.</p> <p><i>Ignore:</i> Ignore the suspense record that matched a record in your database. The process marks the record to be purged.</p>

Posting the EDI TS130 External Data

Access the ADM TS130 Post Parm page (**Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Post Parameters > ADM TS130 Post Parm**).

This example illustrates the fields and controls on the ADM TS130 Post Parm page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'ADM TS130 Post Parm' page with the following sections:

- Run Control ID:** ED. Navigation links: [Report Manager](#), [Process Monitor](#), and a **Run** button.
- Execution Option:** Three radio buttons: ☒ Search, Match and Post; ☐ Post Only; ☐ Search and Match Only.
- Post Processing Parameters:**
 - ☐ Process Single Record
 - Data Source:** School (dropdown)
 - Academic Institution:** PSUNV (text) with a magnifying glass icon and 'PeopleSoft University' (text)
 - Grading Scheme:** (text) with a magnifying glass icon
- Summary Type from External Career:**
 - *External Career: (dropdown)
 - *Summary Type: (text) with a magnifying glass icon
 - Navigation: Find | View All | First | 1 of 1 | Last
 - Buttons: +, -

Execution Option

Field or Control	Description
Search, Match and Post	Select this option if you want to perform the search/match and the post process at the same time. This option is recommended. The EDI TS130 Search/Match/Post process looks for matching data in your database. You can define search/match parameters that tell the process what to do in the case that it finds a match. After the process has performed the match, it posts the EDI TS130 external data to your database.
Post Only	Select this option if you only want to post the external data to your database.
Search and Match Only	Select this option to only run the search and match process on the suspense table. Note that the process only flags the data, according to the parameters you set up, which tells the posting process to create a new person, update an existing person, or ignore the incoming data. However, the process does not create a new person or update an existing person until you post the data.

Post Processing Parameters

Field or Control	Description
Process Single Record	Select this option to process and post a single record. After you select this, select the appropriate record you want to post. If you prefer to process the entire staging table, do not select this option.
Data Source	Select the data source that you want the process to assign to any transcript information that posts to your database. The default is <i>School</i> , but you can select a different value. Values for this field are delivered with your system as translate values. You can modify these translate values.
Academic Institution	Enter the academic institution to post with the academic summary and course data.
Grading Scheme	Enter the grading scheme to populate for each course on the Courses and Degrees page.

Summary Type from External Career

<i>Field or Control</i>	<i>Description</i>
External Career and Summary Type	Cross-reference fields that work in conjunction with external academic summary data from incoming transcripts. These two fields enable the posting of External GPAs to students' external education records—external GPA is tied to summary type, which is a child of external career. External career data is loaded with the TS130 table. By defining desired summary types for each external career that has been loaded, the EDI TS130 Transcript Srch/Post process writes external career, summary type, and external GPA data to the external education record.

Click the **Run** button to run the EDI TS130 Transcript Srch/Post process at user-defined intervals.

Note: You can view the data in the EDI TS130 Staging pages at this time. To view the transcript data posted for a person, use the Education component.

Establishing Address Types

Access the EDI TS130 Post Parm 2 page (**Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Post Parameters > ADM TS130 Post Parm 2**).

This example illustrates the fields and controls on the ADM TS130 Post Parm 2 page. You can find definitions for the fields and controls later on this page.

All of the addresses in EDI TS130 Staging post to the PeopleSoft tables. The Address Type chosen in the Address Search Usage hierarchy is used solely for search/match purposes.

<i>Field or Control</i>	<i>Description</i>
Address Usage Order	Indicates the usage order for the address type in the search process.

<i>Field or Control</i>	<i>Description</i>
Address Type	Select the address type to be used in the search process.

Purging the EDI TS130 Staging Table and Messages

This section discusses how to purge the EDI TS130 staging table and messages.

Page Used to Purge the EDI TS130 Staging Table and Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS130 Purge Params (EDI TS130 purge parameters)	ADM_TS130_PUR_PARM	Student Admissions > Application/Transcript Loads > TS130 > Purge Process	Purge records and messages, if applicable, from the EDI TS130 staging table.

Purging Staging Tables

Access the EDI TS130 Purge Params page (**Student Admissions > Application/Transcript Loads > TS130 > Purge Process**).

Purge Processing Parameter

<i>Field or Control</i>	<i>Description</i>
All Suspense Rows	Select this option to purge all records in your staging table, regardless of the posting status shown in the Post field of the Process Options and Org Process Options pages.
Marked Suspense Rows	Select this option to purge only those records in your staging table marked <i>Purge</i> in the Post field of the Process Options and Org Process Options pages.

Purge Option for Marked Rows

This group box appears when you select the **Marked Suspense Rows** option.

Field or Control	Description
All Marked Suspense Rows	Select this option to purge all the records in your staging table that are marked <i>Purge</i> in the Post field of the Process Options and Org Process Options pages.
Rows Loaded before or on	<p>Select this option and enter a date to purge only those staging records that were loaded on or before the specified date and that are marked <i>Purge</i> in the Post field of the Process Options and Org Process Options pages.</p> <p>Use the Dt Loaded (date loaded) field on the EDI TS130 Process Options page to see when you loaded a record.</p> <p>Suppose you loaded transcripts on May 10, 2008. Subsequently, you loaded another set of transcripts on May 15, 2008. If you select the Rows Loaded before or on option and specify the date as May 15, 2008, the purge process deletes the transcript records marked <i>Purge</i> that were loaded on May 15, 2008, and May 10, 2008.</p>
Rows Posted before or on	<p>Select this option and enter a date to indicate that you want to purge only those staging records that are marked <i>Purge</i> in the Post field of the Process Options and Org Process Options pages and that were posted on or before the specified date.</p> <p>Use the Dt Posted (date posted) field on the EDI TS130 Process Options page to see when you posted a record.</p> <p>Suppose you posted transcripts on May 10, 2008. Subsequently, you posted another set of transcripts on May 15, 2008. If you select the Rows Posted before or on option and specify the date as May 15, 2008, the purge process deletes the transcript records marked <i>Purge</i> that were posted on May 15, 2008, and May 10, 2008.</p>

Message Purge Parameters

Field or Control	Description
Retain Associated Messages	Select this option if you do <i>not</i> want to purge messages associated with the files that you are purging.
Remove Associated Messages	Select this option if you do want to purge messages associated with the files that you are purging.

Click the **Run** button to run the EDI TS130 Transcript Purge process at user-defined intervals.

Purging All EDI Messages

This section lists the page used to purge all EDI messages.

Page Used to Purge All EDI Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI Message Purge	EDI_TS_MSG_PURGE	Student Admissions > Application/Transcript Loads > EDI All Message Purge	Purge all EDI messages. You can run a process to purge all EDI messages in your staging files.

Performing EDI TS189 Application Transactions

Understanding EDI TS189 Application Transactions

Recruiting and Admissions enables you to load applications through EDI (Electronic Data Interchange). This section discusses the steps involved in performing EDI TS189 application transactions.

To perform EDI TS189 application transactions:

1. Process the inbound EC agent.

Specify the location of the file that you want to load into the suspense file on the Schedule Inbound EC Agent page.

See [Processing the Schedule Inbound EC Agent](#).

2. Load the EDI data for application transactions.

Run the TS189 Load Application Process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the **Edit Processing Option** field and click the **Search** button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the **Edit** field on the Process Options page.

4. Search for matching organization data.

After you have loaded the application (TS189) data into the staging files, run the Organization Search process. You must do the organization search as the TS189 load contains some organization data—course information associated with a particular organization—that must be identified to some record in the system.

5. After you have corrected all of the load errors in the suspense files, run the Search/Match/Post process.

This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are actually duplicates.

6. Access each suspense record that was not posted and check to see if it is actually a duplicate.

In the search dialog page of the TS189 Staging component, enter *Complete* in the **Edit Process Option** field and *Perform* in the **Search/Match Process Option** field. Then, click the **Search** button. The search process finds only those suspense records that went through the search/match/post process but were not posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match, and then use the search/match process to look up the biographic/demographic information that matches the suspense record and decide on your own whether a person who matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the biographic/demographic information and test record to your database, update an existing record, or ignore the suspense record altogether.

7. Run the Search/Match/Post Process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a biographic/demographic record that the search/match/post process created, select **Student Admissions > Application Maintenance > Add/Update a Person**. To view a test score record that the search/match/post process created or updated, select **Student Admissions > Application Entry > Academic Information > Test Results**. To view the application created, select **Student Admissions > Application Maintenance > Maintain Application**.

8. Purge files.

Purge TS189 staging table records on the EDI TS189 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your EDI processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer have a need to view them.

Note: Ensure that your system is set up to correctly populate ethnicity information during the TS189 posting process.

See [Setting Up Ethnicity for EDI TS189 Application Transactions](#).

Related Links

[Purging All EDI Messages](#)

[Tracking Test Results for Prospects and Applicants](#)

[Entering or Updating Applicant Biographical Data](#)

Setting Up Ethnicity for EDI TS189 Application Transactions

This section provides an overview of ethnicity setup for EDI TS189 transactions and discusses how to set up ethnicity mapping.

Understanding Ethnicity Setup for EDI TS189 Transactions

You need to make sure that your system is set up to correctly populate ethnicity information during the TS189 posting processes.

In order to populate ethnicity and race information in the system to meet IPEDS requirements, you should complete ethnicity mapping on the IPEDS Ethnicity Mapping table rather than on the Conversion Data Profile. If collecting this data according to the IPEDS requirements is not necessary, then you may use the Conversion Data Profile.

Note: When IPEDS data is available, the system ignores any Ethnic Group field on the Bio/Demo page.

Related Links

[Setting Up Ethnicity in the System](#)

Page Used to Set Up Ethnicity for EDI TS189 Application Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TS189 IPEDS Ethnicity Mapping	SAD_T189_ETHNICITY	Set Up SACR > Product Related > Recruiting and Admissions > Applicants > TS189 IPEDS Ethnicity Mapping	Define and track ethnicity codes to comply with U.S. Federal Integrated Postsecondary Education Data System (IPEDS) requirements.



















Setting Up Ethnicity Mapping

Access the TS189 IPEDS Ethnicity Mapping page (**Set Up SACR > Product Related > Recruiting and Admissions > Applicants > TS189 IPEDS Ethnicity Mapping**).

This example illustrates the fields and controls on the TS189 IPEDS Ethnicity Mapping page. You can find definitions for the fields and controls later on this page.

TS189 IPEDS Ethnicity Mapping

Regulatory Region: USA

Customize Find  First  1-5 of 5  Last					
	IPEDS Race/Ethnicity	Ethnic Group	Description		
1	T	AMIND 	American Indian/Alaska Native		
2	U	ASIAN 	Asian		
3	Q	BLACK 	Black/African American		
4	R	HISPA 	Hispanic/Latino		
5	V	PACIF 	Native Hawaiian/Other Pacific Islander		

The fields on this page map inbound data to the Ethnicity page in PeopleSoft Campus Community.

Field or Control	Description
Regulatory Region	The IPEDS standards apply only to the U.S. region.
IPEDS Race/Ethnicity	Enter an ethnicity code. These codes are mandated by the AACRAO SPEEDE committee's recommendation for handling IPEDS requirements.
Ethnic Group	Select an ethnic group. These codes are set up on the Ethnic Groups page. See "Defining Ethnic Groups" (Campus Community Fundamentals).

Related Links

"Entering Ethnicity Information" (Campus Community Fundamentals)

Loading the EDI Data for Application Transactions

This section discusses how to use the EDI TS189 Load Parm (EDI TS189 load parameters) page to set up application load parameters and to load application data into staging tables.

Page Used to Load the EDI Data for Application Transactions

Page Name	Definition Name	Navigation	Usage
EDI TS189 Load Parm	ADM_TS189_LOD_PARM	Student Admissions > Application/Transcript Loads > TS189 > Load Application Process > EDI TS189 Load Parm	Set up application load parameters and load application data into staging tables. After you process your Inbound EC Agent, define parameters on the EDI TS189 Load Parm page for the data you are loading. Then, run the process to load the data into the staging tables.

Loading Applications

Access the EDI TS189 Load Parm page (**Student Admissions > Application/Transcript Loads > TS189 > Load Application Process > EDI TS189 Load Parm**).

Warning! You should complete the full loading, search/match and posting process before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data already in your staging files.

Field or Control	Description
Regulatory Region	<p>The system uses the value entered here to populate ethnic group fields during TS189 staging.</p> <hr/> <p>Important! Ensure that the ethnic groups defined on the Conversion Data Profile page match those defined for the regulatory region entered here.</p> <hr/>
Male, Female, and Unknown	<p>An EDI load does not include a person's title. It does, however, include gender. In these fields, enter the title you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.</p>

Click the **Run** button to run the EDI TS189 Application Load/EDI process at user-defined intervals. The process uses the **Last Admit Term** field on the Academic Program Table and Academic Plan Table pages to validate academic programs and plans.

Note: You can view the data in the TS189 Staging pages at this time.

Reviewing and Editing the TS189 Staging Pages

You can use the TS189 Staging component to review or edit the application data loaded through the EDI transaction. If you have not run the posting process, any changes you make posts to your database when you run the posting process, which means that the data posts to the person's record (unless otherwise noted).

The TS189 application staging pages are holding tables and are not linked to your database. Personal, organization, and application data from these tables post to your database during the posting process, but the data is not shared. Therefore, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data and to the Application Maintenance, Extracurricular Activities, Honors and Awards, Education, Work Experience, and Test Results components. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

At any time during the TS189 application load process, you can access the TS189 Staging pages to review the information stored here. For example, you might want to look at the data immediately after loading it, after processing it, after posting it, or after each of those steps, depending on your procedures.

If you have not run the posting process, then you can edit the data in these pages before it posts to your database. That way the edited data posts to the person's record.

Note: Be careful when editing the data in your staging files before posting so that you do not inadvertently create duplicate records.

If you find an error in these pages *after* the posting process, you need to go to the proper page in your database to make any changes.

Note: Many of the TS189 Staging pages are similar to those with the same name in the TS130 Staging component. For these common pages, we provide an example of the TS189 page here, but refer you to the corresponding TS130 page section for a description of the fields since they are the same.

This section discusses how to review TS189:

- Staging bio/demo data.
- Staging address data.
- Staging communication data.
- Staging languages.
- Staging recommender data.
- Staging residence data.
- Staging reference numbers data.
- Staging application degree data.
- TS189 staging application entry/questions.
- Staging cumulative GPA data.
- Staging employment data.
- Staging immunizations data.
- Staging religion data.
- Staging activities data.

Pages Used to Review and Edit TS189 Staging Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Options	ADM_TS189_PROC_OPT	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Process Options	Review or edit the process options in your TS189 staging table. This page provides the status of an TS189 application record regarding the loading, search/match and posting processes. For example, you can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors were encountered during the search/match or loading processes.

Page Name	Definition Name	Navigation	Usage
Org Process Options (organization process options)	ADM_TS189_ORG_OPT	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Org Process Options	Review or edit the process options for external organization records in your TS189 staging table.
Bio/Demo (biographic/demographic)	ADM_TS189_BIODEMO1	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Bio/Demo	Review and edit the biographical and demographic data loaded through the TS189 load application process.
Bio/Demo 2 (biographic/demographic 2)	ADM_TS189_BIODEMO2	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Bio/Demo 2	Review and edit the biographical and demographic data loaded through the TS189 load application process.
Names	ADM_TS189_NAM	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Names	View name component information for the application loaded through the TS189 load application process.
Address	ADM_TS189_ADR	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Address	View additional address information loaded through the TS189 load application process.
Organization Detail	ADM_TS189_ADR_SEC	Click the Organization Detail link on the Address page.	View actual address information.
Communications	ADM_TS189_COM	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Communications	View details about TS189 communication data loaded through the TS189 load application process.
Languages	ADM_TS189_LANG	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Languages	View information about an applicant's language use and proficiency loaded through the TS189 load application process.
Recommenders	ADM_TS189_REC	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Recommenders	View information about individuals who recommended the applicant.

Page Name	Definition Name	Navigation	Usage
Address	ADM_TS189_REC_SEC	Click the Address link on the Recommenders page.	View address information for a recommender.
Residences	ADM_TS189_RES	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Residences	View residence data for the applicant and other related people.
Test Scores	ADM_TS189_TESTS	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Test Scores	Review or edit test score data loaded through the TS189 load application process.
Ref Nmbrs (reference numbers)	ADM_TS189_REF	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Ref Nmbrs	View reference number information loaded through the TS189 load application process.
App Degree (application degree)	ADM_TS189_DEG	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > App Degree	Review or edit applicant degree data loaded through the TS189 load application process. Degree information falls under a session.
Application Data	ADM_T189_DEG_EC	Click the Application Data link on the Application Degree page.	View details about an applicant's academic background.
App Entry/Qstns (application entry/questions)	ADM_TS189_SSE	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > App Entry/Qstns	View information about additional application questions and answers, if provided.

Page Name	Definition Name	Navigation	Usage
Org Data (organization data)	ADM_TS189_ORG_DEMO	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Org Data	Review and edit the organization demographic data loaded through the TS189 load application process. Organization data does <i>not</i> post to your database. The organization data from the TS189 application load is matched with an organization in your database. Then, the matching ID is inserted on this page and carried over to the subsequent pages in this component, which contain application data about this organization. The system also uses the matching organization to populate organization information in the Education component.
Sessions	ADM_TS189_SES	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Sessions	Review or edit transcript session data loaded through the TS189 load application process.
Acad Status (academic status)	ACAD_TS189_SST	Student Admissions > Application/Transcript Loads > TS189 > TS189 Acad Status	Review or edit high school academic status data loaded through the TS189 load application process.
Cum GPA (cumulative grade point average)	ADM_TS189_SST2	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Cum GPA	Review or edit applicant cumulative GPA data loaded through the TS189 load application process. GPA information is under a session.
Courses	ADM_TS189_CRS	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Courses	Review or edit applicant course data loaded through the TS189 load application process. Course information is under a session.
Employment	ADM_TS189_EMPLOY	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Employment	Review or edit applicant employment data loaded through the TS189 load application process. Employment information is under a session

Page Name	Definition Name	Navigation	Usage
Immunizations	ADM_TS189_IMMUNIZ	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Immunizations	Review or edit applicant immunizations data loaded through the TS189 load application process.
Religion	ADM_TS189_RELIGION	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Religion	Review or edit applicant religion data loaded through the TS189 load application process.
Activities	ADM_TS189_ACTIVITY	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Activities	Review or edit applicant activities data loaded through the TS189 load application process.
Messages	ADM_TS189_MSGS	Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Messages	View EDI TS189 processing messages.

Reviewing EDI TS189 Staging Bio/Demo Data

Access the Bio/Demo page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Bio/Demo**).

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

Process Options	Org Process Options	Bio/Demo	Bio/Demo 2	Names	Address
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1	In/Out:	Inbound
Cntrl Num:	992040991	Dt Loaded:	09/18/2009		
Last Name:	Shoeman	First Name:	Paulie	Middle Name:	ALBERT
Bio/Demo Data Find View All First 1 of 3 Last					
Relationship Nbr:	1	'Relation:	Self		
Last Name:	Shoeman				
First Name:	Paulie		Middle Name:	ALBERT	
ID:					
Ref Nbr Qual:	SSN	Ref Nbr:	111111111		
SSN:	XXX-XX-XXXX	Date of Birth:	02/02/1959		
Name Prefix:	Mr	<input checked="" type="checkbox"/> Age 18 or Older	Age:		
'Gender:	Male	'Marital Status:	Single		
'Regulatory Region:	United States	Hi Educ Lv:	Not Indic		
Ethnic Group:	Afr Amer				
IPEDS Ethnicity and Race Data					
IPEDS Ethnicity Response:	R	Ethnic Group:	HISPA	Hispanic/Latino	
IPEDS Race Response 1:	Q	Ethnic Group:	BLACK	Black/African American	
IPEDS Race Response 2:	S	Ethnic Group:	WHITE	White	
IPEDS Race Response 3:	T	Ethnic Group:	AMIND	American Indian/Alaska Native	
IPEDS Race Response 4:	U	Ethnic Group:	ASIAN	Asian	
IPEDS Race Response 5:	V	Ethnic Group:	PACIF	Native Hawaiian/Other Pacific Islander	

This page contains biographical and demographic data for the person from the EDI TS189 application load.

IPEDS Ethnicity and Race Data

The data that appears in this group box is populated by the system from the IPEDS Ethnicity Mapping table. The display-only values of *R*, *Q*, *S*, etc. represent the inbound data values; select the Campus Solutions equivalent values in the **Ethnic Group** field.

The TS189 post process uses these CS-mapped values to populate the ethnicity pages and records on various Campus Solutions transaction components

Reviewing TS189 Staging Address Data

Access the Address page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Address**).

This example illustrates the fields and controls on the TS189 Staging - Address page. You can find definitions for the fields and controls later on this page.

Process Options	Org Process Options	Bio/Demo	Bio/Demo 2	Names	Address	Communications
Trans ID: ADM_TRNS_TS189 Queue Inst: 1 In/Out: Inbound Cntrl Num: 992040991 Dt Loaded: 10/01/2004 Last Name: Shoeman First Name: Paulie Middle Initial: A						
Bio/Demo Data Find View All First 1 of 3 Last						
Relationship Nbr: 1 Relation: Self Last Name: Shoeman First Name: Paulie MI: A						
Address Components Find View All First 1 of 2 Last						
*Address Type: Home Location ID: <input type="text"/>						
Dt 1 Qual: <input type="text"/> Date 1: <input type="text"/>						
Dt 2 Qual: <input type="text"/> Date 2: <input type="text"/> Organization Detail						

Field or Control	Description
Dt 1 Qual (date 1 qualifier) and Dt 2 Qual (date 2 qualifier)	Identifies what the dates in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, or the expiration date.
Organization Detail	Click this link to view or edit address information. The Address Detail page appears.

Reviewing TS189 Staging Communication Data

Access the Communications page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Communications**).

This example illustrates the fields and controls on the TS189 Staging - Communications page. You can find definitions for the fields and controls later on this page.

Process Options	Org Process Options	Bio/Demo	Bio/Demo 2	Names	Address	Communications
Trans ID: ADM_TRNS_TS189 Queue Inst: 1 In/Out: Inbound Cntrl Num: 992040991 Dt Loaded: 10/01/2004 Last Name: Shoeman First Name: Paulie Middle Initial: A						
Bio/Demo Data Find View All First 1 of 3 Last						
Relationship Nbr: 1 Relation: Self Last Name: Shoeman First Name: Paulie MI: A						
Communications Components Find View All First 1-3 of 3 Last						
Comm Type	Comm Nbr	Dt 1 Qual	Date 1	Dt 2 Qual	Date 2	
Email Work	PSHOEMAN@HOTMA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Home	2818935050	Start Dt	01/01/1999	Expir Dt	02/15/2000	
Other	2812511341	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

<i>Field or Control</i>	<i>Description</i>
DT 1 Qual (date 1 qualifier) and Dt 2 Qual (date 2 qualifier)	Identifies what the dates in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, or the expiration date.

Reviewing TS189 Staging Languages

Access the Languages page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Languages**).

This example illustrates the fields and controls on the TS189 Staging - Languages page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Languages' page in the TS189 Staging application. The navigation bar at the top includes tabs for Communications, Languages (active), Recommenders, Residences, Test Scores, Ref Nmbrs, and App Degree. The main form area contains the following sections:

- Header Fields:** Trans ID: ADM_TRNS_TS189, Queue Inst: 1, In/Out: Inbound, Cntrl Num: 992040991, Dt Loaded: 10/01/2004, Last Name: Shoeman, First Name: Paulie, Middle Initial: A.
- Bio/Demo Data:** Relationship Nbr: 1, Relation: Self, Last Name: Shoeman, First Name: Paulie, MI: A. Navigation links: Find | View All, First, 1 of 3, Last.
- Language Use:** SeqNum: 1, ID Code Qual: Lang Cd (dropdown), ID Code: EN (text input with search icon), Description: English In The Home (text input), Lang Use: Home (dropdown), Lang Proficny: Englh Prof (dropdown). Navigation links: Find | View All, First, 1 of 1, Last.

<i>Field or Control</i>	<i>Description</i>
ID Code Qual (ID code qualifier)	Indicates which set of language codes is being sent. Values are <i>Lang Cd</i> (language code) and <i>Mutually</i> .
ID Code	A code that identifies the language (such as <i>KO</i> for Korean).

Reviewing TS189 Staging Recommender Data

Access the Recommenders page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Recommenders**).

This example illustrates the fields and controls on the TS189 Staging - Recommenders page. You can find definitions for the fields and controls later on this page.

Communications			Languages			Recommenders			Residences			Test Scores			Ref Nmbrs			App Degree		
Trans ID:	ADM_TRNS_TS189			Queue Inst:	1			In/Out:	Inbound											
Cntrl Num:	992040991			Dt Loaded:	10/01/2004															
Last Name:	Shoeman			First Name:	Paulie			Middle Initial:	A											
Recommender Information												Find View All			First 1 of 3 Last					
*SeqNum:	<input type="text" value="1"/>			Rcmd Type:	<input type="text" value="Employer"/>															
Name:	<input type="text" value="Joseph Stoudamire"/>			Dt Record:	<input type="text" value="06/15/1999"/>			Address												
Title:	<input type="text" value="Manager"/>																			
Recommendation Type:	<input type="text" value="Manager"/>																			
Length Known Quant Qualifier:	<input type="text" value="DY"/>			Length Known:	<input type="text"/>															
Comm Qual 1:	<input type="text" value="AP"/>			Communication Number 1:	<input type="text"/>															
Comm Qual 2:	<input type="text"/>			Communication Number 2:	<input type="text"/>															
Business Name:	<input type="text"/>			ID Code:	<input type="text"/>															

Field or Control	Description
SeqNum (sequence number)	The sequential number of this row of data. The first data item (or row) loaded is 1. The next row is 2, and so on.
Rcmd Type (recommendation type)	The recommendation type that the system posts to the General Materials component.
Dt Record (date record)	The date of the recommendation.
Recommendation Type	The free-form name or mutually defined indicator for the type of recommendation being supplied when there is a need to distinguish types of recommendations. Types might include counselor evaluation, faculty evaluation, and supervisor recommendation.
Length Known Quant Qualifier (length known quantity qualifier)	Codes that identify the format of the Length Known field. Values are <i>DY</i> (days), <i>MN</i> (months), and <i>YY</i> (years).
Length Known	The amount of time the recommender has known the applicant. The code in the Length Known Quant Qual field defines the format of the number in this field. For example, if Length Known contains the value 78 and the Length Known Quant Qual field contains <i>DY</i> , then the recommender has known the applicant for 78 days.
Comm Qual 1 and Comm Qual 2 (communication qualifier 1 and communication qualifier 2)	Codes identifying the type of communication number that appears in the Communication Number 1 and Communication Number 2 fields. Values are:

Code	Name
AP	Alternate Telephone
AS	Answering Service
BN	Beeper Number
CP	Cellular Phone
EM	Electronic Mail
FX	Facsimile
HP	Home Phone Number
NP	Night Telephone
PC	Personal Cellular
TE	Telephone
WC	Work Cellular
WF	Work Facsimile Number
WP	Work Phone Number

Field or Control	Description
Communication Number 1 and Communication Number 2	The complete communication number, including country or area code (when applicable).
ID Code	Identification of an organizational entity.
Address	Click to access the Address Detail page and view address information for this recommender.

Reviewing TS189 Staging Residence Data

Access the Residences page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Residences**).

This example illustrates the fields and controls on the TS189 Staging - Residences page. You can find definitions for the fields and controls later on this page.

Communications				Languages		Recommenders		Residences		Test Scores		Ref Nmbrs		App Degree	
Trans ID:	ADM_TRNS_TS189		Queue Inst:	1		In/Out:	Inbound								
Cntrl Num:	992040991		Dt Loaded:	10/01/2004											
Last Name:	Shoeman		First Name:	Paulie		Middle Initial:	A								
Find View All First 1 of 1 Last															
*Industry Code:	Pur Prpty														
Relation Code:	Father														
Location Qual:															
Location ID:															
Dt 1 Qual:	Start Dt		Date 1:	06/01/1997											
Quantity Qual:	Months		Quantity:	24											
Country:	USA		United States												
State:	TX		Texas												
Postal Code:															

Field or Control	Description
Industry Code	Indicates a particular criteria or test for determining residency.
Relation Code	Indicates the relationship to the student of the individual to which this residency test or criteria applies. Examples include but are not limited to: 01 (spouse), 03 (parent), 26 (guardian), 32 (mother), and 33 (father).
Location Qual (location qualifier)	Code identifying the type of location.
Location ID	Code identifying a specific location.
Dt 1 Qual (date 1 qualifier)	Identifies what the date in the Date 1 field represents. For example, the date could represent the start date, the end date, or the expiration date.
Date 1	The date that the Dt 1 Qual field identifies.
Quantity Qual (quantity qualifier)	Identifies what the value in the Quantity field represents. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are: <i>Days, Weeks, Months, and Years.</i>
Quantity	The days, weeks, months, or years—as specified in the Quantity Qual field—that this person lived with this relation.

Reviewing TS189 Staging Reference Numbers Data

Access the Ref Nmbrs (reference numbers) page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Ref Nmbrs**).

This example illustrates the fields and controls on the TS189 Staging - Ref Nmbrs page. You can find definitions for the fields and controls later on this page.

Communications Languages Recommenders Residences Test Scores Ref Nmbrs App Degree			
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1
Ctrl Num:	992040991	Dt Loaded:	10/01/2004
Last Name:	Shoeman	First Name:	Paulie
		Middle Initial:	A
<div>Find View All First 1 of 1 Last</div>			
Ref ID Qual:	SSN	*Ref ID:	XXXXXXXX
Description:	STUDENT REPORTED SSN		
Location Qual:	(Invalid Val)	Location ID:	Regis
Dt 1 Qual:		Date 1:	
Dt 2 Qual:		Date 2:	
City:	Hollywood	State:	CA
Postal Code:		Country:	USA
Entity ID:	Postsecd	Name:	Charles Tupper

Field or Control	Description
Ref ID Qual (reference ID qualifier)	A code identifying what the reference ID represents. Examples of reference ID qualifiers include but are not limited to: SSN (Social Security number), state ID, PIN (personal identification number), and visa number.
Ref ID (reference ID)	The Ref ID Qual field defines this number. For example, if the reference ID qualifier is <i>SSN</i> , then the reference ID number is the person's Social Security number.
Location Qualifier	A code identifying the type of location.
Location ID	A code identifying a specific location.
Dt 1 Qual (date 1 qualifier) and Dt 2 Qual (date 2 qualifier)	Identifies what the dates in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, or the expiration date.
Entity ID	The type of entity to which this name and location applies (for example, school, city, or county).

Reviewing TS189 Staging Application Degree Data

Access the App Degree (application degree) page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > App Degree**).

This example illustrates the fields and controls on the TS189 Staging - App Degree page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
ID Code Qual (ID code qualifier)	Identifies what the field of study represents. <i>Mutually</i> means that the value in the Field of Study 1 field is mutually defined.
Application Data	<p>Click this link to view additional application data. The Application Data page appears.</p> <hr/> <p>Note: Admissions application records use the value of the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.</p>

Note: You can view the transcript data posted for a person through the Education component or through the Education Summary inquiry component.

Reviewing TS189 Staging Application Entry/Questions

Access the App Entry/Qstns (application entry/questions) page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > App Entry/Qstns**).

This example illustrates the fields and controls on the TS189 Staging - App Entry/Qstns page. You can find definitions for the fields and controls later on this page.

Ref Nmbrs	App Degree	App Entry/Qstns	Org Data	Sessions	Acad Status	Cum GPA	Courses
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1	In/Out:	Inbound		
Cntrl Num:	992040991	Dt Loaded:	10/01/2004				
Last Name:	Shoeman	First Name:	Paulie	Middle Initial:	A		
Application Entry Find View All First 1 of 1 Last							
SSE Nbr:	1	Priority:		<input type="checkbox"/> Application Error			
Entry Date:	01/01/2000	Exit Date:					
Status Reasn Cd:							
Application Questions Find View All First 1 of 7 Last							
SeqNum:	1						
Code Lst Qual:	App Q Qual						
Appl Q ID Code:	Free form question	Yes/No:	No				
Descr1:	MINI OR SHORT TERM						
Descr2:							

Field or Control	Description
Priority	A number that indicates the priority of choice for an intended entry into a school, school program, or postsecondary institution.
Application Error	Indicates whether or not there was an error when loading this application data. (display-only)
Entered Date	The applicant's desired entry date.
Exit Date	The applicant's desired exit date.
Status Reasn Cd (status reason code)	A code identifying a reason for the applicant's status, such as dropout or graduated.
Code Lst Qual (code list qualifier)	A code identifying a specific industry code list. For example, <i>App Q Qual</i> (application question identifier) and <i>Mutually Defined</i> .
Appl Q ID Code (application question identifier code)	A code identifying the type of question that was asked.
Yes/No	Indicates whether the applicant answered the question yes or no. The possible values are <i>N</i> (no), <i>U</i> (unknown), <i>W</i> (not applicable), and <i>Y</i> (yes).
Descr 1 (description 1)	A free-form question or indicator for a mutually defined question when the codified questions are not adequate.

Field or Control	Description
Descr 2 (description 2)	The free-form or fill-in-the-blank response to a question when a response is needed. Some questions require that an explanatory note accompany an answer; for example, the question "Have you ever been convicted of a crime?" may require further explanation.

Reviewing TS189 Staging Cumulative GPA Data

Access the Cum GPA (cumulative grade point average) page (**Student Admissions > Application/ Transcript Loads > TS189 > TS189 Staging > Cum GPA**).

This example illustrates the fields and controls on the TS189 Staging - Cum GPA page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Cum GPA' page for a student. At the top, there are tabs for 'Ref Nmbrs', 'App Degree', 'App Entry/Qstns', 'Org Data', 'Sessions', 'Acad Status', 'Cum GPA' (selected), and 'Courses'. Below the tabs, student information is shown: Trans ID: ADM_TRNS_TS189, Queue Inst: 1, In/Out: Inbound, Cntrl Num: 992040991, Dt Loaded: 10/01/2004, Last Name: Shoeman, First Name: Paulie, Middle Initial: A. A navigation bar includes 'Find | View All' and 'First 1 of 4 Last'. The main section shows 'SeqNum: 1' and 'Descr: Cottonwood High School'. Below this, a form contains fields for 'Unit Type' (Semester), 'Course Level' (Senior), 'Total Units Attempted' (30), 'Total Completed Units' (30), 'Acad Hrs Atmptd' (30), 'Quality Points' (empty), 'Excessive GPA Flag' (checkbox), 'External GPA' (3.5), 'Sum Data Source' (checkbox), and a 'Cumulative' checkbox.

Field or Control	Description
Acad Hrs Atmptd (academic hours attempted)	The number of academic hours the person attempted.
Quality Points	The quality points used to compute the person's GPA.
Excessive GPA Flag	Indicates that an A+ grade has a value higher than the highest possible GPA.
Sum Data Source (summary data source)	A code used to indicate the source of the summary data. Values are <i>A</i> (self-reported) and <i>D</i> (college transcript).
Cum Summary (cumulative summary)	Indicates whether the summary is cumulative.

Reviewing TS189 Staging Employment Data

Access the Employment page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Employment**).

This example illustrates the fields and controls on the TS189 Staging - Employment page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Employment' tab selected in the top navigation bar. The main content area displays the following information:

- Trans ID:** ADM_TRNS_TS189
- Queue Inst:** 1
- In/Out:** Inbound
- Cntrl Num:** 992040991
- Dt Loaded:** 10/01/2004
- Last Name:** Shoeman
- First Name:** Paulie
- Middle Initial:** A

Below this, there are two expandable sections:

- Employer:** Contains fields for SeqNum, Employer Name (Steveston Fishing Co.), Description (Seafood Importers), Emp Code (Employer), and Emp Loc Qual (Curr Addr).
- Position:** Contains fields for Description (Dock Worker), Date 1 (01/01/1994), Date 2 (12/31/1999), Format (CM), and Type (Start Dt).

The Employer

Field or Control	Description
Emp Code (employer code)	The employer code. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Employer</i> and <i>Mutually</i> .
Emp Loc Qual (employer location qualifier)	Defines the address type: for example, home address, current address, local address.

Position

Field or Control	Description
Date 1 and Date 2	The dates that the action in the Type field occurred. In the example in the preceding page shot, the start date of the position was January 1, 2000.
Format	Defines the units in which the date is defined. For example, if the date is set at <i>CCYYMM</i> , then data represented as 01/01/2000 would be transmitted as 000101: century, year, month.

Field or Control	Description
Type	Specifies whether the date represents the starting date or the ending date.
Address	Click to access the Address Detail page and view address information for this employer.

Reviewing TS189 Staging Immunizations Data

Access the Immunizations page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Immunizations**).

This example illustrates the fields and controls on the TS189 Staging - Immunizations page. You can find definitions for the fields and controls later on this page.

Note: Immunization data does not post to the PeopleSoft Immunization table.

Field or Control	Description
Immunization Date(s)	The date or dates that the immunization occurred.
Immunization Code	The type of immunization a person received. The following table contains possible codes defined by the Postsecondary Electronic Standards Council. Some possible codes are:

Immunization Code	Description
V03.2	Vaccine for Tuberculosis

Immunization Code	Description
V03.6	Vaccine for Pertussis
V03.7	Tetanus Toxoid Inoculation
V04.01	Polio Oral
V04.02	Polio Immunization
V04.1	Vaccine for Smallpox
V04.2	Vaccine for Measles
V04.3	Vaccine for Rubella
V04.6	Vaccine for Mumps
V04.8	Vaccine for Influenza
V06.1	Vaccine for DTP
V06.12	TD

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council website.

Field or Control	Description
Immunization Status Code	Indicates the status of an immunization conducted on a person. Possible codes are:

Code	Name
1	First Inoculation
2	Second Inoculation
3	Third Inoculation
4	Fourth Inoculation

Code	Name
5	Fifth Inoculation
6	Sixth Inoculation
7	Seventh Inoculation
8	Eighth Inoculation
9	Ninth Inoculation
10	Medical Exemption
11	Personal Exemption
12	Religious Exemption
13	Had the Disease
14	Has Not Had the Disease

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council website.

Field or Control	Description
Immunization Type Code	Indicates the title or contents of a document, report, or supporting item. Some possible codes are:

Code	Description
CQ	County Record
HR	Health Clinic Records
IR	State School Immunization Records
MG	Migrant Student Records Transfer System (MSRTS) Record
PY	Physician's Report

Code	Description
<i>ZZ</i>	Mutually Defined

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council website.

Field or Control	Description
Identification Code Qual (identification code qualifier)	Identifies a specific industry code list, such as <i>AAW</i> (Immunization Injection Code).
Date/Time Period Qualifier	Defines the units in which the Immunization Date(s) field is defined. For example, if the Date/Time Period Qualifier field is set at <i>MMDDCCYY</i> , then data represented as 04/06/2000 would be transmitted as 04062000.

Reviewing TS189 Staging Religion Data

Access the Religion page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Religion**).

This example illustrates the fields and controls on the TS189 Staging - Religion page. You can find definitions for the fields and controls later on this page.

Religious Affiliation			
SeqNum:	1		
Religious Code:	Catholic		
Description:	Christian		
Identification Code Qual:	Rel Cd		

Field or Control	Description
Identification Code Qual	Identifies a specific industry code list, such as <i>REL Cd</i> (religion code).

Note: Religion data does not post to the PeopleSoft Religious Preferences table.

Reviewing TS189 Staging Activities Data

Access the Activities page (**Student Admissions > Application/Transcript Loads > TS189 > TS189 Staging > Activities**).

This example illustrates the fields and controls on the TS189 Staging - Activities page. You can find definitions for the fields and controls later on this page.

Acad Status				Cum GPA		Courses		Employment		Immunizations		Religion		Activities		Messages	
Trans ID:	ADM_TRNS_TS189			Queue Inst:	1			In/Out:	Inbound								
Cntrl Num:	992040991			Dt Loaded:	10/01/2004												
Last Name:	Shoeman			First Name:	Paulie			Middle Initial:	A								
Activities Find View All First 1 of 2 Last																	
Qualifier Code:	Award Cd																
Activity/Award Code:	AWARD																
Description 1:	Hobie Meyer Athletic Award																
Description 2:	Athletic Award																
Time In Activity:	5																
Activity Unit:	Years																

Field or Control	Description
Qualifier Code	Identifies a specific industry code list, such as <i>Award Cd</i> (award code).

Searching for Matching Organization Data

After you have loaded the application data into the staging files, you perform an organization search step. You must do the organization search because the TS189 load contains organization data—course information associated with a particular organization—that must be related to some record in your database.

This section discusses how to use the EDI TS189 Organization Search page.

Page Used to Search for Matching Organization Data

Page Name	Definition Name	Navigation	Usage
EDI TS189 Org Search (EDI TS189 organization search)	ADM_TS189_ORG_PARM	Student Admissions > Application/Transcript Loads > TS189 > Organization Search Process	Perform the organization search.

Using the EDI TS189 Organization Search Page

Access the EDI TS189 Org Search page (**Student Admissions > Application/Transcript Loads > TS189 > Organization Search Process**).

Click the **Run** button to run the EDI TS189 App Org Search process at user-defined intervals.

Setting Up TS189 Search/Match/Post Parameters, and Processing and Posting the EDI Staging Files

After you have reviewed the staging tables, specify on the Search/Match Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the TS189 data and then you can run both processes at once: to search for matching people in your database and to post the external TS189 data according to the parameters you set up.

Note: The recommended option is to select the **Search, Match, and Post** option to search for matching people in your database and post the TS189 data to the database in one step.

To set up TS189 search/match/post parameters, and to process and post the staging files:

- Set up the EDI TS189 search/match parameters.
- Set up post parameters for EDI TS189 external data.
- Set up additional post parameters for TS189 external data.

Pages Used to Set Up TS189 Search/Match/Post Parameters, and to Process and Post EDI Staging Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Post Parameters	ADM_TS189_PST_PARM	Student Admissions > Application/Transcript Loads > TS189 > Search/Match/Post Process > Post Parameters	Post TS189 application data. You can post a single record or all records in the staging table.
Post Parameters 2	ADM_TS189_PST_PRM2	Student Admissions > Application/Transcript Loads > TS189 > Search/Match/Post Process > Post Parameters 2	Enter additional run control defaults, such as contact type, external career, summary type, and material group information.

Setting Up the EDI TS189 Search/Match Parameters

Access the Search/Match Parameters page (**Student Admissions > Application/Transcript Loads > TS189 > Search/Match/Post Process > Search/Match Parameters**).

Set up your search/match parameters for processing the EDI TS189 application staging table.

Related Links

[Setting Up Search/Match Parameters](#)

Setting Up Post Parameters for EDI TS189 External Data

Access the Post Parameters page (**Student Admissions > Application/Transcript Loads > TS189 > Search/Match/Post Process > Post Parameters**).

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

Post Parameters

PostParameters 2

Search/Match Parameters

Run Control ID: 11Sept2009run

[Report Manager](#) [Process Monitor](#)

Run

Search/Match/Post Exec Options

☒ Search, Match and Post

☐ Post Only

☐ Search and Match Only

TS189 Post Processing Parm

☐ Process Single Record

'Data Source:'

School

Update IPEDS Ethnicity Flag

☐ For All Person Records Posted

☒ For New Person Records Added

Search/Match/Post Exec Options

Field or Control	Description
Search, Match, and Post	Select this option if you want to perform the search/match and the post process at the same time. This is the recommended option. The EDI TS189 Search/Match/Post process looks for matching data in your database. You can define search/match parameters that tell the process what to do in the case that it finds a match. After the process has performed the match, it posts the EDI TS189 external data to your database.
Post Only	Select this option if you only want to post the external data to your database.

Field or Control	Description
Search and Match Only	Select this option to only run the search and match process on the suspense table. Note that the process only flags the data, according to the parameters you set up, which tells the posting process to create a new person, update an existing person, or ignore the incoming data. However, the process does not create a new person or update an existing person until you post the data.

TS189 Post Processing Params

Field or Control	Description
Process Single Record	Select this option to process and post a single record. After you select this, select the appropriate record you want to post. If you prefer to process the entire staging table, do not select this option.
Data Source	Select the data source that you want the process to assign to any transcript information that posts to your database. The default is <i>School</i> . You can select a different value. Values for this field are delivered with your system as translate values. You can modify these translate values.

Update IPEDS Ethnicity Flag

Field or Control	Description
For New Person Records Added	Select this option to instruct the TS189 Post program to check the IPEDS flag for each row on the Ethnicity page in Campus Community only for new person records added to the system.
For All Person Records Posted	Select this option to instruct the TS189 Post program to check the IPEDS flag for each row on the Ethnicity page in Campus Community for both new and updated EMPLIDs.

Related Links

[Posting the EDI TS130 External Data](#)

Setting Up Additional Post Parameters for EDI TS189 External Data

Access the Post Parameters 2 page (**Student Admissions > Application/Transcript Loads > TS189 > Search/Match/Post Process > Post Parameters 2**).

This example illustrates the fields and controls on the Post Parameters 2 page. You can find definitions for the fields and controls later on this page.

[Post Parameters](#)
[Post Parameters 2](#)
[Search/Match Parameters](#)

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

Org Contact Type

Contact Type: GCS

Summary Type from External Career
Find | View All
First 1 of 1 Last

*External Career: High Schl
*Summary Type: HSOV High School Overall

Recommendation Material Group and Type from Academic Career
Find | View All
First 1 of 1 Last

*Institution: PSUNV
*Academic Career: Undergrad
*Material Group: UGPORTFL UG Prtfls
*Matl Type: POR Portfolio

Field or Control	Description
Contact Type	Select the contact type to enable the posting of new organization and organization contact information that is loaded with the TS189 file.
External Career and Summary Type	These are cross reference fields that work in conjunction with external academic summary data from incoming applications. The two fields enable the posting of external GPAs to students' external education records (external GPA is tied to summary type, which is a child of external career). External career data is loaded with the TS189 file. By defining desired summary types for each external career that has been loaded, the TS189 PeopleSearch/Post process writes external career, summary type, and external GPA data to the external education record.
Institution, Academic Career, Material Group, and Matl Type (material type)	These fields enable the posting of recommendation material group information. Select material groups that represent recommendations and the recommendation material type. Recommendation material group information gets posted to the general materials page. Define material groups on the Material Group Table page.

Purging the TS189 Staging Table and Messages

This section discusses how to use the EDI TS189 Purge Parm (EDI TS189 purge parameters) page to purge records and messages, if applicable, from the EDI TS189 staging table.

Page Used to Purge the EDI TS189 Staging Table and Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS189 Purge Params (EDI TS189 purge parameters)	ADM_TS189_PUR_PARM	Student Admissions > Application/Transcript Loads > TS189 > Purge Process	Purge records and messages, if applicable, from the TS189 staging table.

Purging the EDI TS189 Staging Table and Messages

Access the EDI TS189 Purge Params page (**Student Admissions > Application/Transcript Loads > TS189 > Purge Process**).

TS189 Purge Processing Params

<i>Field or Control</i>	<i>Description</i>
All Suspense Rows	Select this option if you want to purge all records in your staging table, regardless of what is in the Post field on the Process Options and Org Process Options pages.
Marked Test Suspense Rows	Select this option if you want to purge only those records in your staging table marked <i>Purge</i> in the Post field on the Process Options and Org Process Options pages.

TS189 Msg Purge Process Params

<i>Field or Control</i>	<i>Description</i>
Retain Associated Messages	Select this option if you do not want to purge messages associated with the files that you are purging.
Remove Associated Messages	Select this option if you want to purge messages associated with the files that you are purging.

Click the **Run** button to run the EDI TS189 Application Purge process at user-defined intervals.

Processing External Test Scores

Understanding External Test Score Data Processing

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

The ability to receive external test score data and post it to your database is integral to recruiting and evaluating applicants. Academic institutions receive hundreds, if not thousands, of test scores each year. Using your Recruiting and Admissions application, you can receive external test score data, review the data for errors, and post the data, confident that you are not creating duplicate IDs. You can also post test score data to PeopleSoft CRM and have the post process create prospect records directly in CRM.

Recruiting and Admissions supports loading many test scores, such as the ACT, ADA, AMCAS, AP, CRS, DAT, EOS, GMAT, GRE, LSAT/LSDAS, SAT, SSS and TOEFL. The ultimate goal in processing external test score data is to update test score data for individuals through electronic data loads. Your institution receives tapes that contain scores, bio/demo, and sometimes transcript data for individuals. For each test, you first load the data into suspense tables. Then, you ensure that you are not going to create any duplicate bio/demo or test records. (It's very hard to identify and correct duplicate records after they've been created.) Finally, you post the bio/demo and test score data to your database. (The search/match/post process posts self-reported academic information to test score candidate data tables.) You follow this process for each test.

Regardless of the test, the same components are used to load, view, and post test score data. The ID of the test that you are processing must be entered on each component. The entry of the test ID determines which fields appear on each page. The test IDs shown in the prompt are based on your test ID security. You must have test ID security defined in order to process external test scores.

To process external test score data:

1. Load the test score data from a file in your directory into a suspense table using the External Test Score Load Application Engine (SAD_TST_LOAD) process.
2. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter the test ID, *Error* in the **Edit Processing Option** field and click the **Search** button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the **Edit** field on the Test Score Suspense Data page.

3. After you have corrected all of the load errors, run the Search/Match/Post Test Scores Application Engine (SAD_TEST_PST) process.

This process looks for data in your database (based on search parameters that you define on the search/match criteria pages, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process will not post the record until you can manually determine which records are actually duplicates. You can also choose to create prospect records and assign 3Cs during the post process.

You can post the test scores to either Campus Solutions or PeopleSoft CRM (if you have installed PeopleSoft CRM). The External Test Score Mapping page indicates which test scores can be posted to CRM. You can post the following test scores to CRM: ACT, AP, CRS, DAT, EOS, GMAT, GMAT, GRE, LSAT, SAT, SSS and TOEFL. The following test scores cannot be posted to CRM: ADA, AMCAS, LSDAS, NCEA, OUAC, QTAC, SATAC, Studielink, UAC, and VTAC. If you post the test scores to CRM, the Search/Match/Post Test Scores process automatically creates prospect records in CRM.

4. View each suspense record that did not get posted and confirm that it is actually a duplicate.

In the search dialog page of the suspense component, enter the test ID, *Complete* in the **Edit Process Option** field and *Perform* in the **Search/Match Process Option** field. Then click the **Search** button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match, then use Search Match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

5. Run the Search/Match/Post Test Scores process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select **Student Recruiting > External Test Score Processing > Add/Update a Person or Student Admissions > External Test Score Processing > Add/Update a Person**. To view a test score record that the search/match/post process created or updated, select **Student Recruiting > External Test Score Processing > Test Results or Student Admissions > External Test Score Processing > Test Results**.

6. Purge the suspense tables.

You should purge the suspense tables as soon as all of the suspense records have been posted to the database. This helps to avoid confusion the next time that you load data into the suspense tables.

7. (Optional) Review test score candidate data.

When external test score loads contain additional information about the student, such as academic interests, extracurricular activities, and prior schools attended, the search/match/post process stores the data in the Test Score Candidate Data component.

The process does not store candidate data if you post the test scores to PeopleSoft CRM.

8. (Optional) Create prospects from tests.

Create prospects from posted test scores using query manager to define a specific population.

See [Understanding Creating Prospects from Test Scores with Query](#).

9. (Optional) Create applicants from tests. Create applications for posted ADA, AMCAS, or LSAT/LSDAS tests.

See [Pages Used to Create Applications from External Test Score Data](#).

Related Links

[Reviewing Test Score Candidate Data](#)

"Understanding CRM for Higher Ed" (Campus Solutions Application Fundamentals)

Loading External Test Score Files

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

To run an external test score load process, you must enter the directory path where the test data file is located (such as \\network\test files\ACT_1.dat). The process loads the data from the file into suspense tables.

This section lists prerequisites and discusses how to set up load parameters and load the file.

Prerequisites

Before you load external test scores, you must:

1. Set up tests and test components.
2. Set up test ID security for all appropriate users.
3. Configure the External Test Load Mapping page.
4. Configure the Ethnic Group Mapping page.
5. Configure Country Mapping if applicable to the test score being loaded.

See [Pages Used to Create Applications from External Test Score Data](#).

Page Used to Load External Test Score Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Test Score Load	SAD_TEST_LOAD	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Load • or Student Admissions > External Test Score Processing > External Test Score Load 	<p>Designate the directory location of the test scores that you are loading and enter the load parameters for that test.</p> <hr/> <p>Note: You should complete the full loading, search/match and posting process before loading a new set of data. If you have test scores waiting to be processed, such as ACT test scores, do not load a new ACT test score file until you have processed the data in your ACT suspense files.</p> <hr/>

Setting Up Load Parameters and Loading the File

Access the External Test Score Load page (**Student Recruiting > External Test Score Processing > External Test Score Load** or **Student Admissions > External Test Score Processing > External Test Score Load**).

This example illustrates the fields and controls on the External Test Score Load page (1 of 2). You can find definitions for the fields and controls later on this page.

External Test Score Load

Run Control ID: GRE

[Report Manager](#) [Process Monitor](#) [Run](#)

*Test ID Graduate Record Exam

Test Score File Name and Path

Name Prefix

Male:

Female:

Unknown:

General Test Parameters

General Test Prior to August 1, 2011

Verbal Reasoning: Verbal Reasoning

Quantitative Reasoning: Quantitative Reasoning

Revised General Test Beginning August 1, 2011

Verbal Reasoning: New Verbal Reasoning

Quantitative Reasoning: New Quantitative Reasoning

Analytical Writing: Analytical

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This example illustrates the fields and controls on the External Test Score Load page (2 of 2). You can find definitions for the fields and controls later on this page.

Subject Test Parameters

Biochem, Cell & Molecular:

BC

Biochem, Cell, Molec Biology

Biochemistry Subscore:

BCS

Biochemistry Subscore

Cell Biology Subscore:

CBS

Cell Biology Subscore

Molecular Bio & Genetics Sub:

MBGS

Molecular Bio & Genetics Subsc

Biology:

BY

Biology

Cellular & Molecular Bio Sub:

CMBS

Cellular & Molecular Bio Subsc

Organismal Biology Subscore:

OBS

Organismal Biology Subscore

Ecology & Evolution Subscore:

EES

Ecology & Evolution Subscore

Chemistry:

CH

Chemistry

Computer Science:

CS

Computer Science

Literature in English:

EL

Literature in English

Mathematics:

MA

Mathematics (Subject)

Physics:

PH

Physics

Psychology:

PY

Psychology

Experimental Psychology Sub:

EPS

Experimental Psych Subscore

Social Psychology Subscore:

SPS

Social Psych Subscore

Test ID

Field or Control	Description
Test ID	Select the test that you want to load. Define test ID values on the Test Tables page. Once the Test ID is entered, the additional fields specific to the test will appear. You must have Test ID Security established in order to select a value. This field is required.

Test Score Input File Name

<i>Field or Control</i>	<i>Description</i>
Test Score Input File Name	<p>Enter the path of the directory and file where the test data resides. This field is required.</p> <p>For the ADA test only:</p> <p>In the AADSAS field, enter the name of the directory and file where the AADSAS data resides. This file contains the biographical, parent and family, secondary school, personal statement, release statement, and test score information.</p> <p>In the AADSAS (Courses Completed) field, enter the name of the directory and file where the list of completed courses resides.</p> <p>In the AADSAS (Courses Planned) field, enter the name of the directory and file where the planned or in-progress list of courses resides.</p> <p>In the AADSAS (College) field, enter the name of the directory and file where the list of attended colleges resides.</p> <p>In the AADSAS (GPA) field, enter the name of the directory and file where the GPA data resides.</p> <p>In the AADSAS (GPA per College) field, enter the name of the directory and file where the GPA summary for each college resides.</p> <p>In the AADSAS (GPA per Session) field, enter the name of the directory and file where the GPA summary for each session resides.</p>

Name Prefix

<i>Field or Control</i>	<i>Description</i>
Male, Female, and Unknown	<p>Test score loads do not include name prefixes. They do, however, include gender. Select the prefix according to the gender provided in the test data load. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Dr</i>, <i>Miss</i>, <i>Mr</i>, <i>Mrs</i>, and <i>Ms</i>.</p>

Test Parameters

The test components appear based on the test ID that you entered. For example, ACT has seven components as part of its test, but LSAT reports only one component. After the Test ID field is populated,

enter the test component corresponding to each test parameter listed. The prompt in test parameters displays only the test components for the test ID. Test components are mapped to the test ID on the Test Table page. You may leave these fields blank for EOS, GMASS, and SSS. The Test components must be entered for all other tests.

See [Understanding External Test Score Loads Setup](#)

Field or Control	Description
Score and Percentile	For EOS, GMASS, and SSS only: For each test component, enter the score and percentile that you want to appear for all of the EOS, GMASS, and SSS records that you load. EOS, GMASS, and SSS are search tapes and do not deliver test scores. If you used test scores or percentiles as part of your criteria when purchasing the search tape, you have the option of entering that information on the page. The scores and percentiles will be posted for each person on the search tape. You may leave these fields blank.

Mapping Additional Test Codes

For AP, SAT, and SSS only: These tests require that you map additional test codes for the test. To begin, click the button to retrieve the test codes for the test ID. The left column is the delivered test code. This is the code that the testing organization defines. (To view the delivered codes, select **Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores** and then choose the component that you want to review.) The right column is the corresponding component that you defined on the Test Component page and mapped to the test ID on Test Table page. Select the test component that corresponds to the delivered test code.

Other Parameters

Field or Control	Description
Test Date, Test Day, Test Month, Degree Day, Graduation Day, and Graduation Month	The PeopleSoft date format requires a day, month, and year. If the date format for a test omits one of these numbers, the system asks you to enter the numeric value for the missing number (such as day, month, or graduation day) that you want the load process to use when it converts the date to the PeopleSoft date format. This also allows the program to populate the Degree Date and Graduation Date information to the prospect record if you select the Create Prospect field on the Search/Match/Post Test Scores page. Values for Test Day , Degree Day , and Graduation Day are 1 through 28. Values for Test Month and Graduation Month are 1 through 12.
LSAT/LSDAS Test Score	For LSAT/LSDAS only: Select <i>LSAT</i> or <i>LSDAS</i> to indicate the type of file that you are loading.

Field or Control	Description
Score/Test Type	For ADA only: Select USA or CAN to indicate if the test is administered for the United States or Canada. The test components on the page change based on the option that you select.
SAT I Search, PSAT/NMSQT Search, or AP Search	For SSS only: Your institution can buy the names of students who have either taken the SAT I, PSAT/NMSQT, or AP exams. Select the search tape that you are loading. The format of the file varies according to the test that you are loading.
School Tape Type	For SAT only: Select the type of file that you're loading: <i>College</i> or <i>Secondary</i> . The default is <i>College</i> . The format of the file varies between the two school tape types.
Initial or Full	For DAT only: Select one of these options to determine whether to have the system load the student's middle name initial or the full middle name. The default setting is to load the middle initial.

Correcting and Editing Data in the Suspense Record

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

This section provides an overview of the correcting and editing of suspense data and discusses how to review:

- Test score suspense data.
- Personal information.
- Test score data.

Understanding the Correcting and Editing of Suspense Data

You edit information in the suspense record. However, remember that the search/match/post process only posts bio/demo data and test score data to your database. The system stores additional data that the test loads contain in the Test Score Candidate Data component. This data does not affect other tables in your database.

Before entering the External Test Score Suspense component, you must enter the test ID and at least one other search criteria. The pages in the component dynamically appear based on the test ID that you enter. The pages in the component are similar in the way that they look and work. For example, every suspense component has a Personal Information page and a Tests page. In addition, they all share the first page: the Test Score Suspense Data page. Some testing agencies ask questions about college preferences, high school activities, and transcript information. Independent of the testing agency, core, and supplemental data are handled similarly within the system.

Much of the data that is loaded into the suspense record is data that the person entered when completing the student profile section of the test. If the person left out information or did not complete the entire section, there will be empty fields in the suspense component.

Many of the values and codes that appear in the suspense component are based on values and codes that the testing agency defines. Contact the testing agency that manages the test for full descriptions of the data that appears in these pages or refer to the test score layouts that you receive from the testing agency.

Correcting Load Errors

An error is indicated on the External Test Score Suspense component when certain values are missing or invalid. You will see an error flag for First Name or Last Name if the value is not populated. In addition an error flag will appear for the following data if it is invalid for the test ID entered: Birthdate, Graduation Date, Test Date, Test Component, Country, Subject Test Code, and Degree Date. An invalid test score is a score that is outside the valid test score range according to the ranges that you defined on the Test Table page. The program validates the country for every test where a country code is received. The country code is validated against the PS Country table, with the exception of ADA, AMCAS, AP and SAT which have their own country mapping tables. Find the field that contains the missing value and enter a valid value. You can find the First Name, Last Name, and Birthdate fields on the Personal Information page, and the Test Date and Test Component fields on the Tests page. For other error indicators, look through the suspense component to find the corresponding field and enter a valid value.

After you enter a valid value for the fields that were missing or incorrect, save the component. The Edit field on the Process Options page should now display *Complete*. Be sure to correct all errors before posting the data.

Note: Data in suspense tables does not affect tables in your database until you post the data by running the search/match/post process. In addition, if you find an error in the suspense component after you run the search/match/post process, you must go to the proper page in your database to make any changes. For example, if you found an error on the Personal Information page in the suspense component, you must go to the Add/Update a Person component in the External Test Score Processing menu to correct the error.

Related Links

"Using Search/Match" (Campus Community Fundamentals)

Pages Used to Correct and Edit Data in the Suspense Record

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Score Suspense Data	SAD_SUSP_PROC_OPTN	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Test Score Suspense Data • Student Admissions > External Test Score Processing > External Test Score Suspense > Test Score Suspense Data 	View and correct load process results and test score messages. This page appears for every test ID.
Personal Information	SAD_ACT_SUS_BIO SAD_ADA_SUS_BIO SAD_AMC_SUS_BIO SAD_AP_SUS_BIO SAD_CRS_SUS_BIO SAD_DAT_SUS_BIO SAD_EOS_SUS_BIO SAD_GMS_SUS_BIO SAD_GMT_SUS_BIO SAD_GRE_SUS_BIO SAD_LAW_SUS_BIO SAD_SAT_SUS_BIO SAD_SSS_SUS_BIO SAD_TFL_SUS_BIO	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Personal Information • Student Admissions > External Test Score Processing > External Test Score Suspense > Personal Information 	Review and edit the student's personal information in the suspense record. Refer to the data layouts from the testing agency to determine the fields that will appear. Each test has a Personal Information page. The data varies depending on the test ID.

Page Name	Definition Name	Navigation	Usage
Tests	SAD_ACT_SUS_TST SAD_ADA_SUS_TST SAD_AMC_SUS_TST SAD_AP_SUS_TST SAD_CRS_SUS_TST SAD_DAT_SUS_TST SAD_EOS_SUS_TST SAD_GMS_SUS_TST SAD_GMT_SUS_TST SAD_GRE_SUS_TST SAD_LAW_SUS_TST SAD_SSS_SUS_TST SAD_TFL_SUS_TST	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Tests • Student Admissions > External Test Score Processing > External Test Score Suspense > Tests 	<p>Review or edit test data in the suspense record. Some of the information on this page is required (such as test date and test components). If this information is missing in the external test data load, you must enter valid values here before posting the record.</p> <p>Refer to the data layouts from the testing agency to determine the fields that will appear. Each test has a Tests page, with the exception of SAT. The data varies depending on the test ID.</p>
Academics	SAD_ACT_SUS_SPS	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Academics • Student Admissions > External Test Score Processing > External Test Score Suspense > Academics 	<p>For ACT only: Review or edit academic data in the suspense record. Refer to the data layouts from ACT to determine the fields that will appear.</p> <p>Note that the same changes have been made to the corresponding candidate data page (SAD_ACT_CD_ACAD).]</p>
Activities	SAD_ACT_SUS_COL	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Activities • Student Admissions > External Test Score Processing > External Test Score Suspense > Activities 	<p>For ACT only: Review and edit activity information in the suspense record. Refer to the data layouts from ACT to determine the fields that will appear.</p>

Page Name	Definition Name	Navigation	Usage
Interests	SAD_ACT_SUS_INT	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Interests • Student Admissions > External Test Score Processing > External Test Score Suspense > Interests 	For ACT only: Review and edit interest data in the suspense record. Refer to the data layouts from ACT to determine the fields that will appear.
Education	SAD_ADA_SUS_OTH	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Education • Student Admissions > External Test Score Processing > External Test Score Suspense > Education 	For ADA only: Review and edit education data in the suspense record. Refer to the data layouts from Associated American Dental Schools Application Service (AADSAS) to determine the fields that will appear.
Courses	SAD_ADA_SUS_CRS	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Courses • Student Admissions > External Test Score Processing > External Test Score Suspense > Courses 	For ADA only: Review and edit course detail information in the suspense file. Refer to the data layouts from AADSAS to determine the fields that will appear.
Applicant Data	SAD_ADA_SUS_ADDL SAD_AMC_SUS_OTH	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Applicant Data • Student Admissions > External Test Score Processing > External Test Score Suspense > Applicant Data 	For ADA only: Review and edit applicant data in the suspense record. Refer to the data layouts from AADSAS to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
Family Information	SAD_ADA_SUS_FAMILY	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Family Information • Student Admissions > External Test Score Processing > External Test Score Suspense > Family Information 	For ADA only. Review and edit the family information data in the suspense record. Refer to the data layouts from AADSAS (Associated American Dental Schools Application Service) to determine the fields that will display.
Essays	SAD_ADA_SUS_ESSAY	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Essays • Student Admissions > External Test Score Processing > External Test Score Suspense > Essays 	For ADA only. Review and edit the personal statement data in the suspense record. Refer to the data layouts from AADSAS to determine the fields that will display.
Colleges	SAD_AMC_SUS_COL	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Colleges • Student Admissions > External Test Score Processing > External Test Score Suspense > Colleges 	For AMCAS only: Review and edit college data in the suspense record. Refer to the data layouts from American Association of Medical Colleges (AAMC) to determine the fields that will appear.
GPA/Hours	SAD_AMC_SUS_GPA	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > GPA/Hours • Student Admissions > External Test Score Processing > External Test Score Suspense > GPA/Hours 	For AMCAS only: Review and edit undergraduate education data in the suspense record. Refer to the data layouts from AAMC to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
Schools	SAD_AP_SUS_SCH	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Schools • Student Admissions > External Test Score Processing > External Test Score Suspense > Schools 	For AP only: Use the Schools page to review and edit school data in the suspense record. Refer to the data layouts from Educational Testing Service (ETS) to determine the fields that will appear.
Awards	SAD_AP_SUS_PREV SAD_SSS_SUSP_SDQ	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Awards • Student Admissions > External Test Score Processing > External Test Score Suspense > Awards 	For AP and SSS only: Review and edit additional question information in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
Additional Information	SAD_CRS_SUS_ACI	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Additional Information • Student Admissions > External Test Score Processing > External Test Score Suspense > Additional Information 	For CRS only: Review and edit additional information in the suspense record. Refer to the data layouts from Law School Admission Council (LSAC) to determine the fields that will appear.
Profile Data	SAD_GRE_SUS_PRFL	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Profile Data • Student Admissions > External Test Score Processing > External Test Score Suspense > Profile Data 	For GRE only: Review and edit profile data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
Prior Schools	SAD_LAW_SUS_MTR	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Prior Schools • Student Admissions > External Test Score Processing > External Test Score Suspense > Prior Schools 	For LSAT/LSDAS only: Review and edit prior schools attended in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.
Candidate Data	SAD_LAW_SUS_ACI	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Candidate Data • Student Admissions > External Test Score Processing > External Test Score Suspense > Candidate Data 	For LSAT/LSDAS only: Review and edit candidate data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.
Recommendations	SAD_LAW_SUS_REC	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Recommendations • Student Admissions > External Test Score Processing > External Test Score Suspense > Recommendations 	For LSAT/LSDAS only: Review and edit recommendation data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.
Academics	SAD_LAW_SUS_SCH	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Academics • Student Admissions > External Test Score Processing > External Test Score Suspense > Academics 	For LSAT/LSDAS only: Review and edit academic data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
SAT I	SAD_SAT_SUS_SATI	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > SAT I • Student Admissions > External Test Score Processing > External Test Score Suspense > SAT I 	For SAT only: Review and edit SAT I data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
SAT II	SAD_SAT_SUS_SATII	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > SAT II • Student Admissions > External Test Score Processing > External Test Score Suspense > SAT II 	For SAT only: Review and edit SAT II data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
Student Data	SAD_SAT_SUS_SDQ SAD_SSS_SUS_SDQ	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > Student Data • Student Admissions > External Test Score Processing > External Test Score Suspense > Student Data 	For SAT and SSS only: Review and edit student data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
School Data	SAD_SAT_SUS_SDQ2	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Suspense > School Data • Student Admissions > External Test Score Processing > External Test Score Suspense > School Data 	For SAT only: Review and edit school data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.

Reviewing Test Score Suspense Data

Access the Test Score Suspense Data page (**Student Recruiting > External Test Score Processing > External Test Score Suspense > Test Score Suspense Data** or **Student Admissions > External Test Score Processing > External Test Score Suspense > Test Score Suspense Data**).

This example illustrates the fields and controls on the Test Score Suspense Data page. You can find definitions for the fields and controls later on this page.

Test Score Suspense Data		Personal Information	Tests	Academics	Activities	Interests	
Last Name:		Record Number: 100327					
First Name: Pavel		Date Loaded: 08/13/2004					
Middle Initial: A							
Test ID: ACT ACT Assessment							
Processing Options							
*Edit:	Error	*Search:	Perform	*Post:	Awaiting Search/Match		
Error Indicators							
<input checked="" type="checkbox"/> Last Name <input checked="" type="checkbox"/> Birthdate <input checked="" type="checkbox"/> Test Date							
Search / Match Results							
Order Number: 0		Matches: 0					
Messages Customize Find View All First 1-4 of 6							
Severity	Message Text	Description	Comments	Process Instance	Run Date/Time	Process Name	User ID
1 Message	A blank last name was detected. Verify entry.			204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
2 Message	An invalid birth date was detected. Verify Entry.		An invalid birth date of "31" was detected.	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
3 Message	Record has been loaded.	Record was loaded by the load program.	First Name : Pavel Middle Initial : A Last Name :	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
4 Error	An invalid test date has been detected. Verify Entry.		An invalid Test Date of "1996" was detected.	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS

This page provides the status of a suspense record regarding the loading, search/match and posting processes.

Any informational and error messages that external test data load and search/match/post processes generate appear on this page. You can use this page to keep current on the status of an individual's test score processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your test score processing. To do so, you would need to wait to purge your test score messages until you have completed your analysis.

Processing Options

Field or Control	Description
Edit	<p>Displays the status of the load process for this suspense record. The load process populates this value.</p> <p><i>Complete:</i> The load process loaded the test score data without a problem. This record is ready to be posted.</p> <p><i>Error:</i> The load process encountered problems when loading the test score data. The system indicates the values that you must correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to <i>Complete</i>.</p> <p><i>Perform:</i> You set this value manually. This is for informational purposes only.</p>

Field or Control	Description
Search	<p>Displays the status of the search/match process for this suspense record. The search/match process populates this value.</p> <p><i>Complete:</i> The search/match process completed successfully.</p> <p><i>Error:</i> The search/match process encountered problems. Refer to the log file for information regarding the error.</p> <p><i>Perform:</i> The search/match process will process this record the next time that you run the process.</p>
Post	<p>Displays the status of the record regarding the search/match/post process. You can enter these values manually; however, some are entered by the system after processes are run, as described in the following table. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.</p>

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	<p>The system was unable to find a match in the database and will add a record with a new ID to your database when you run the search/match/post process.</p> <p>When set manually, this value means that the process identified a match and the user determined manually that no duplication exists. When the user runs the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Personal Information page.</p>	<p>Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times).</p> <p>Set manually.</p>
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.

Post Value	Meaning	How Set
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	<p>The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record.</p> <p>When set manually, means that the process identified a match, and the user determined manually that duplication exists. The system makes available the ID field on the Personal Information page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.</p>	<p>Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times).</p> <p>Set manually.</p>
Awaiting Search/Match	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note: While you can manually edit the values in the Edit, Search, and Post fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you may experience problems when posting the data.

Error Indicators

Field or Control	Description
Last Name, Test Date, Birth Day, First Name, Graduation Date, High School Graduation Date, and Test Component	When a load error occurs, the load external data process displays the required values that were missing or incorrect in the load. Go to the Personal Information page, the Tests page, or another page in the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error, the system clears the check box and the fields will no longer appear. After all of the check boxes are cleared and the component is saved, the system displays <i>Complete</i> in the Edit field.

Search/Match Results

<i>Field or Control</i>	<i>Description</i>
Order Number	You know that the search/match/post process found a match and did not post the suspense record when the Search field contains <i>Perform</i> and displays the search order number that led to the match in the Order Number field. Use this information to decide whether a possible duplicate exists.
Matches	Displays the number of matches that the process found at the order number given.

Messages

<i>Field or Control</i>	<i>Description</i>
Message Severity	The message severity, such as <i>Message</i> or <i>Error</i> .
Message Text	The message on this row of data.
Description	The detailed message.
Comments	Results or other additional information about the message.
Process Instance	The process number of the process that you ran for this record. Process Scheduler generates this number.
Run Date/Time	The day and time that the process ran for this record.
Process Name	The name of the application engine that you ran for this record (for example, in the previous page example, the messages displayed from running SAD_TST_LOAD application engine, which is the External Test Score Load process).
User ID	The user ID of the person who ran the process.

Reviewing Personal Information

Access the Personal Information page (**Student Recruiting > External Test Score Processing > External Test Score Suspense > Personal Information** or **Student Admissions > External Test Score Processing > External Test Score Suspense > Personal Information**).

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

Test Score Suspense Data	Personal Information	Tests	Academics	Activities	Interests																																				
*Last Name: <input type="text" value="Ronning"/>		Record Number: 100135																																							
*First Name: <input type="text" value="Cliff"/>		Date Loaded: 06/09/2010																																							
Middle Initial: <input type="text" value="M"/>																																									
Test ID: ACT ACT Assessment																																									
Personal Information																																									
ID: <input type="text"/>																																									
Name Prefix: <input type="text" value="Mr"/>																																									
Birthdate: <input type="text" value="11/01/1975"/>		ACT Birthdate: 19751101																																							
*Gender: <input type="text" value="Male"/>		ACT Gender: M																																							
SSN: <input type="text" value="XXX-XX-XXXX"/>		ACT SSN: <input type="text" value="XXXXXXXX"/>																																							
Address 1: <input type="text" value="6464 Eportia Cir"/>																																									
City: <input type="text" value="Mesa"/>																																									
State: <input type="text" value="AZ"/> <input type="button" value="Search"/> Arizona																																									
ACT State: AZ																																									
Postal Code: <input type="text" value="85215"/>																																									
Country: <input type="text" value="USA"/> <input type="button" value="Search"/> United States																																									
Telephone Number: <input type="text" value="602/924-5340"/>		ACT Phone Type: 1																																							
Citizenship Status: <input type="text" value="Native"/>		ACT Citizenship: 1																																							
Legal Resident of State: <input type="text" value="1"/>																																									
Email Address: <input type="text" value="cronning5_az@gmail.com"/>																																									
ACT Hispanic or Latino: 2		Ethnicity: 6																																							
Ethnic Group Selection																																									
<table border="1"> <thead> <tr> <th colspan="3">Race Responses</th> <th>Customize</th> <th>Find</th> <th>View All</th> <th>First</th> <th>1-2 of 2</th> <th>Last</th> </tr> <tr> <th>Ethnicity</th> <th>Ethnic Group</th> <th>Description</th> <th colspan="6"></th> </tr> </thead> <tbody> <tr> <td>2</td> <td>ASIAN</td> <td>Asian</td> <td colspan="6"></td> </tr> <tr> <td>4</td> <td>PACIF</td> <td>Native Hawaiian/Other Pacific Islander</td> <td colspan="6"></td> </tr> </tbody> </table>						Race Responses			Customize	Find	View All	First	1-2 of 2	Last	Ethnicity	Ethnic Group	Description							2	ASIAN	Asian							4	PACIF	Native Hawaiian/Other Pacific Islander						
Race Responses			Customize	Find	View All	First	1-2 of 2	Last																																	
Ethnicity	Ethnic Group	Description																																							
2	ASIAN	Asian																																							
4	PACIF	Native Hawaiian/Other Pacific Islander																																							

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

Profile Information									
Religion:	<input type="text" value="28"/>								
Disability:	<input type="text" value="1"/>								
ROTC:	<input type="text" value="2"/>								
Distance From College:	<input type="text" value="3"/>								
English Spoken at Home:	<input type="text" value="1"/>								
Vocation Choice:	<input type="text" value="453"/>								
Expected Highest Educ Level:	<input type="text" value="3"/>								
Planned Housing:	<input type="text" value="1"/>								
<table border="1"> <thead> <tr> <th>Confidence In</th> <th>Planned Academic Load</th> </tr> </thead> <tbody> <tr> <td>Vocation:</td> <td><input type="text" value="2"/></td> </tr> <tr> <td>College Major:</td> <td><input type="text" value="2"/></td> </tr> <tr> <td colspan="2"> <input checked="" type="radio"/> Full Time <input type="radio"/> Part Time </td> </tr> </tbody> </table>		Confidence In	Planned Academic Load	Vocation:	<input type="text" value="2"/>	College Major:	<input type="text" value="2"/>	<input checked="" type="radio"/> Full Time <input type="radio"/> Part Time	
Confidence In	Planned Academic Load								
Vocation:	<input type="text" value="2"/>								
College Major:	<input type="text" value="2"/>								
<input checked="" type="radio"/> Full Time <input type="radio"/> Part Time									

Use Personal Information page in the suspense component to review and edit biographical and demographic data loaded through the external test data load. Use this page to edit the person's last name,

first name, and birth date, if the external data load omitted these values. The data varies depending on the test ID. Common fields are described in this section.

When the search/match/post process posts the data in the suspense record, the process posts much of this data to the newly created personal information record.

Note: If the search/match/post process finds a match and updates the existing record with the data in the suspense file, the process does not update the personal information. This prevents you from overriding verified information.

Field or Control	Description
Record Number	Displays the test record number. This number is automatically populated based on the Installation parameters.
Date Loaded	Displays the date that you loaded this record.
Last Name, First Name, and Middle Initial	Displays the person's last name, first name, and middle initial or middle name, as they appear in the test record. If the Last Name or First Name fields are empty, enter values.
ID	<p>This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here when the process creates a new record.</p> <p>If the process finds a match and updates an existing record, the process enters the ID of the record that it updated.</p> <p>If the process finds a match and retains the record in the suspense table, and you decide to update an existing ID (by selecting <i>Update ID</i> in the Post field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.</p>
Birthdate	Displays the person's birth date after the load process converts it to the PeopleSoft date standard from the birth date reported on the test.
Name Prefix	Displays a name prefix, according to the gender from the test record and the prefix criteria that you set up on the External Test Score Load page.
Gender	The person's gender. The load process converts the person's gender as reported in the test record to the corresponding PeopleSoft gender code.
Ethnic Group	Displays the person's ethnic group. The load process converts the person's ethnicity code as reported on the test record to the corresponding PeopleSoft ethnic group. This value is populated based on the Ethnic Group Mapping page. This setup must be done for the Test ID indicated or a value will not appear.

Field or Control	Description
SSN (social security number)	Displays the person's social security number after the load process converts it to the PeopleSoft standard from the social security number reported on the test.
Address 1, Address 2, City, State, Country, and Postal Code	Displays the person's address. The load program validates the country for every test where a country code is received. The country code is validated against the PS Country table, with the exception of ADA, AMCAS, AP and SAT which have their own country mapping tables.
Telephone	Displays the person's telephone number.
Citizenship Status	Displays the person's citizenship status. This value is populated based on the conversion of the data from the test record to a PeopleSoft value. Values for this field are delivered with your system as translate values.

Reviewing Test Score Data

Access the Tests page (**Student Recruiting > External Test Score Processing > External Test Score Suspense > Tests** or **Student Admissions > External Test Score Processing > External Test Score Suspense > Tests**).

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

Test Score Suspense Data		Personal Information		Tests		Academics		Activities		Interests																																																																																																													
Last Name: Ronning				Record Number: 100135																																																																																																																			
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Test Date:		06/03/1996		ACT Test Date:		199606																																																																																																																	
Test ID:		ACT				ACT Assessment																																																																																																																	
Test Location:		F		Corrected Score Indicator:		<input type="checkbox"/>																																																																																																																	
Reporting Year:		95		Sum of Scale Scores:		068																																																																																																																	
<input checked="" type="checkbox"/> Standard Test Administration																																																																																																																							
<table border="1"> <thead> <tr> <th colspan="2"></th> <th colspan="2">Post</th> <th colspan="2">Error</th> <th colspan="2">Test Component</th> <th colspan="2">Score</th> <th colspan="2">Percentile</th> </tr> <tr> <th colspan="2"></th> <th colspan="2"></th> <th colspan="2"></th> <th colspan="2"></th> <th>Post</th> <th>ACT</th> <th>Post</th> <th>ACT</th> </tr> </thead> <tbody> <tr> <td>English:</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>ENGL</td> <td></td> <td>English</td> <td>19.00</td> <td>19</td> <td>37</td> <td>37</td> <td></td> <td></td> </tr> <tr> <td>Math:</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>MATH</td> <td></td> <td>Math</td> <td>22.00</td> <td>22</td> <td>68</td> <td>68</td> <td></td> <td></td> </tr> <tr> <td>Reading:</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>READ</td> <td></td> <td>Reading</td> <td>13.00</td> <td>13</td> <td>5</td> <td>05</td> <td></td> <td></td> </tr> <tr> <td>Science Reason:</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>SCIRE</td> <td></td> <td>Science Reasoning</td> <td>14.00</td> <td>14</td> <td>2</td> <td>02</td> <td></td> <td></td> </tr> <tr> <td>Composite:</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>COMP</td> <td></td> <td>Composite</td> <td>17.00</td> <td>17</td> <td>15</td> <td>15</td> <td></td> <td></td> </tr> <tr> <td>English/Writing:</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>EW</td> <td></td> <td>Combined English/Writing</td> <td></td> <td>--</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Writing:</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>WR</td> <td></td> <td>Writing</td> <td></td> <td>--</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>														Post		Error		Test Component		Score		Percentile										Post	ACT	Post	ACT	English:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ENGL		English	19.00	19	37	37			Math:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MATH		Math	22.00	22	68	68			Reading:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	READ		Reading	13.00	13	5	05			Science Reason:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SCIRE		Science Reasoning	14.00	14	2	02			Composite:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	COMP		Composite	17.00	17	15	15			English/Writing:	<input type="checkbox"/>	<input type="checkbox"/>	EW		Combined English/Writing		--					Writing:	<input type="checkbox"/>	<input type="checkbox"/>	WR		Writing		--				
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Field or Control	Description
Test Date	Displays the day that this person took the test. The load process converts the test date delivered with the test to the PeopleSoft format, which appears here. The search/match/post process posts the test date to your database when you run the process for this suspense record.
Test ID	Displays the ID of the test taken by this person. Define test IDs on the on the Test Tables page. The test ID is entered as a parameter during the load process.
Post	The load process selects this check box if the score and component are valid. You can post the score for this component.

Field or Control	Description
Error	The load process selects this check box if it encounters an error with either the component or the score during the load process. You can view additional information about this error on the Test Score Suspense Data page. The error must be cleared in order for the component and score to post to Test Results. Once the specific error is corrected, the Error check box is cleared and the Post check box is selected.
Test Component	Displays the test components that you selected on the External Test Score Load page for the test ID.
Score and Percentile	Displays the reported score and percentile for each component (if applicable).

Performing the Search/Match Process and Posting External Data

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

This section provides an overview of performing search/match and posting test scores and discusses how to:

- Process search/match/post test scores.
- Set up search/match parameters for test score data.

Understanding Performing Search/Match and Posting Test Scores

The search/match/post process consists of two separate processes that complement each other. The search/match process uses data from the suspense record to determine if the person might already exist in your database. The purpose of the search/match is to prevent duplicate records. Duplicate records are difficult to find and delete after they have been created. The post process uses the data in the suspense record to create persons if they do not already exist and to create or update test score data based on the search/match results. The post process also creates or updates test score candidate data.

You can specify what you want the post process to do when search/match finds a match (or multiple matches). Based on the results of the search/match process, the post process can update the record in your database that matches the suspense record if you are sure that the person in your database is the same person to whom the test data relates. For example, if the search/match process found a matching social security number, you might be confident that this is the same person, so the post process could update the record automatically. You can also define search/match parameters that tell the post process to wait on posting the record. This enables you to review the record and decide manually if it matches a record

already in your database. For example, you would want to check whether duplication exists if the only parameters that matched were name and gender.

If the search/match process does not find a match, and you selected the Add option for the New parameter on the Search Parameters page, the post process populates data from the suspense record to your database. Data from the suspense records post to the Add/Update a Person component, the Test Results component, and the Test Score Candidate Data component. After you post suspense data, you must use these components to edit the information.

You can perform the search/match and post processes separately, or you can perform them together. You should run the search/match and post processes in one step. This ensures that you process the records in the correct order.

You might run the search/match/post process more than once for a suspense record. If the search/match/post process finds possible matches in the suspense table, you must manually determine whether a match exists and then run the process again.

You can also create prospect records for all students for whom you post external test data. Before you create prospects as part of the search/match/post process, you can optionally configure test ID mapping options for academic interests, extracurricular activities, religious preference, admit terms, and program, plan and subplan. You can also define event IDs for 3Cs.

Pages Used to Perform the Search/Match Process and Posting External Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search/Match/Post Test Scores	SAD_TEST_POSTS	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Search/Match/Post/Test Scores • Student Admissions > External Test Score Processing > Search/Match/Post Test Scores 	Post external test data from suspense files. Before you post the data, however, set up the search/match parameters on the Search Parameters page. You can post a single record or all of the records in the suspense file. You can also create prospect records from this data.
Search Parameters	SEARCH_PARMS	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Search/Match/Post/Test Scores > Search Parameters • Student Admissions > External Test Score Processing > Search/Match/Post Test Scores > Search Parameters 	Use this page to set up your search/match parameters. These are the rules that determine what the post process should do with the suspense record after the search/match process is complete. This page is the same for each Test ID entered on the Search/Match/Post Test Scores page.

Processing Search/Match/Post Test Scores

Access the Search/Match/Post Test Scores page (**Student Recruiting > External Test Score Processing > Search/Match/Post/Test Scores** or **Student Admissions > External Test Score Processing > Search/Match/Post Test Scores**).

This example illustrates the fields and controls on the Search/Match/Post Test Scores page. You can find definitions for the fields and controls later on this page.

Search/Match/Post Test Scores

Search Parameters

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

Run

Test ID ACT ACT Assessment

Execution Option

☐ Search, Match and Post
☒ Post Only
☐ Search and Match Only

Ethnicity Update Rules

☒ Update All Records
☐ Update If Not Populated

Update IPEDS Ethnicity Flag

☒ For All Person Records Posted
☐ For New Person Records Added
☐ Do Not Update

Hispanic/Latino Ethnic Group

Ethnic Group HISPA Hispanic/Latino

Post Processing Parameters

☒ Process Single Record

100129 TREVORC LINDEN

Data Source: ACT

Address Type: Home

☒ Populate Email Address

Email Type: Home

Commit Frequency 1

☐ Create Prospects

Field or Control	Description
Test ID	Enter the test ID that you want to process. Once you enter the test ID, the additional fields specific to the test will appear. You must have Test ID Security established in order to select a value. The prompt will display only test IDs to which you have security to access. This field is required.

LSAT/LSDAS Test Score

The system displays this group box if you have selected the CRM for Higher Education check box on the SA Features page and if the test ID is LSAT.

<i>Field or Control</i>	<i>Description</i>
LSAD Test Score	The system does not display the Post To group box if you select this option. You cannot post LSAD test scores to CRM.
LSAT Test Score	The system displays the Post To group box if you select this option. You can post the LSAT test scores to CRM.

Execution Option

<i>Field or Control</i>	<i>Description</i>
Search, Match and Post	Select this option if you want the process to search your database for records that match the suspense record <i>and</i> post the suspense data to your database. This is the recommended option.
Post Only	Select this option if you want only to post the suspense data to your database (if you select this option, you must have already run search/match or manually changed the Search and Post process options on the External Test Score Suspense page).
Search and Match Only	Select this option if you want to only run the search and match process on the suspense file. You will need to post the data at a later time.

Post To

<i>Field or Control</i>	<i>Description</i>
Campus Solutions	Select this option if you want to post the suspense data to Campus Solutions.

Field or Control	Description
Enterprise CRM	<p>Select this option if you want to post the suspense data to PeopleSoft CRM.</p> <p>The system displays this option if you have selected the CRM for Higher Education check box on the SA Features page of the Student Admin Installation component and if the test ID is eligible for posting to CRM. If the test ID is eligible for posting to CRM, the system displays the Available for CRM Post check box as selected on the External Test Score Mapping page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, External Test Score Mapping).</p>

Important: If you have opted to post to CRM and if there is no matching person record in Campus Solutions, the process does not create a EMPLID or any record in Campus Solutions. The process will only send the test score and prospect data as a message to Integration Broker. If you have opted to post to CRM and if there is a matching person record in Campus Solutions, the process adds a new record in the Test Results page for the EMPLID (Student Recruiting, External Test Score Processing, Test Results *or* Student Admissions, External Test Score Processing, Test Results) in addition to sending the message to Integration Broker.

Ethnicity Update Rules

For ACT, LSAT/LSDAS, AMCAS only:

Field or Control	Description
Update All Records	<p>Select this option if you want the process to post the ethnicity data to the ethnicity records (DIVERS_ETHNIC and ETHNICITY_DTL) for all existing EMPLIDS. The posted ethnicity data can be viewed on the Ethnicity page (Campus Community, Personal Information, Biographical, Personal Attributes, Ethnicity) or on the Regional page of the Add/Update a Person component (Campus Community, Personal Information or Personal Information (Student), Add/Update a Person).</p> <p>If you select this option and if data already exists for an EMPLID on the ethnicity records, the process inserts a new row into the records for the EMPLID. If the Ethnic Group of NSPEC is currently populated on either ethnicity record, new rows will not be inserted.</p>
Update If Not Populated	<p>Select this option if you want the process to post the ethnicity data only for those EMPLIDS who do not have existing ethnicity data.</p>

Set Hispanic/Latino Indicator

For LSAT/LSDAS only:

Field or Control	Description
Hispanic/Latino Populated	<p>Select this option if you want the process to check the Person is Hispanic or Latino check box on the Ethnicity or Regional page (HISP_LATINO = Y for a DIVERS_ETHNIC record).</p> <p>If you select this option, the process checks the Person is Hispanic or Latino check box if the person's test score ethnicity data is mapped to an Ethnic Group with the EEO Ethnic Category of Hispanic/Latino (Ethnicity or Regional page displays EEO Ethnic Category as the Ethnic Category).</p>
Do Not Update	<p>Select this option if you do not want the process to check the Person is Hispanic or Latino check box on the Ethnicity page.</p> <p>If you select this option, the process does not check the Person is Hispanic or Latino check box even if the person's test score ethnicity data is mapped to an Ethnic Group with the EEO Ethnic Category of Hispanic/Latino.</p>

Update IPEDS Ethnicity Flag

For ACT, LSAT/LSDAS, and AMCAS only:

Field or Control	Description
For New Person Records Added	<p>Select this option if you want the process to check the IPEDS check box on each ethnic group row inserted to the Ethnicity or Regional page (ETH_VALIDATED = Y for each DIVERS_ETHNIC record) only for new EMPLIDS added to the system.</p>
For All Person Records Posted	<p>Select this option if you want the process to check the IPEDS check box on each ethnic group row inserted to the Ethnicity or Regional page (ETH_VALIDATED = Y for each DIVERS_ETHNIC record) for both new and updated EMPLIDS.</p>
Do Not Update	<p>This check box is available only for ACT. Select this check box if you do not want the process to check the IPEDS check box regardless of whether the suspense record contains ethnicity information.</p>

Hispanic/Latino Ethnic Group

For ACT only:

Field or Control	Description
Ethnic Group	Select the PeopleSoft ethnic group code that the search/match/post process should post to the Ethnicity group box of the Ethnicity or Regional page. The process posts this value only if the person is Hispanic or Latino.

Post Processing Parameters

Field or Control	Description
Process Single Record	Select this check box if you want to run the search/match/post process for a single suspense record. The field to the right becomes available. Select the suspense record that you want to process. Only records where the Edit processing option is set to Complete on the External Test Score Suspense component will appear.
Data Source	Select the data source from which this information was received. Data source is a required value on the Test Results page. The search/match/post process will post the value that you select here to the Test Results page. Values for this field are delivered with your system as translate values. You can modify these translate values.
Address Type	If the search/match/post process adds a new record to your database, the process loads the address information from the test record into the Addresses page. Select the address type that you want the process to assign to the new address. Define address types on the Address Type Table.
Phone Type	If the search/match/post process adds a new record to your database, the process loads the phone number from the test record to the Personal Information page. Select the phone type that you want to process to assign to the new phone number. This field will appear only for test IDs where the phone number is loaded.

Field or Control	Description
Commit Frequency	<p>The commit frequency enables you to decide how often the data is saved during the Search/Match/Post process. The field defaults to <i>1000</i>. Edit this field to decrease or increase the number of records that are processed before being saved.</p> <p>The commit frequency can help with the performance of the program. A commit frequency that is too low, however, can slow the program down.</p>
Populate Email Address, Email Type	<p>Select this check box to post an email address to the Email Addresses on the Add/Update a Person component. If you choose to populate an email address, you must then select an email type.</p> <hr/> <p>Note: These fields appear only for test IDs where an email address is loaded.</p> <hr/>
Create Prospects	<p>Select to create prospect records for the IDs that are added or for existing IDs where no prospect record exists from the test score post. The Default Prospect Values group box becomes available to enter default values for the prospect records that the system creates. You can view prospect data in the Create/Update Prospect component under the menu Student Recruiting, Maintain Prospects.</p> <p>If you have selected the Enterprise CRM option in the Post To group box, the system selects the Create Prospects check box and disables it</p> <p>You must enter the required fields in the Default Prospect Values group if the Create Prospects check box is selected.</p>

Default Prospect Values

Select the default values that you want the system to assign to the prospects that you create from the test score post. For example, if you select *UGRD* in the **Academic Career** field, the system will assign every prospect it creates to the undergraduate academic career. To create prospects in Campus Solutions, you must enter an academic institution, academic career, recruiting status, and recruiting center. To create prospects in CRM, you must enter an academic institution, academic career, and recruiting status. Recruiting Center becomes an optional field if you have selected the Post to Enterprise CRM option. In certain circumstances, you might also want to assign additional information, such as academic program and plan, and admit term, when your test load contains a specific set of prospects.

Field or Control	Description
Academic Program	Because the Academic Program table is keyed by admit term, you must select an admit term to select an academic program. You do not have to assign an academic program.
Assign 3C	<p>If you are posting data to Campus Solutions, select this check box to assign 3Cs to the prospects that you create from the test score post. The Event ID field becomes available.</p> <p>The system clears and disables this check box if you have selected the Enterprise CRM option in the Post To group box. The 3Cs feature is not available in CRM.</p>
Event ID	Assign an event ID to the prospects that you create from the test score post. Only the event IDs that have the administrative functions PROS (prospect) and PROP (prospect program) are available. PROP is available only if you select an academic program on this page. Define event IDs on the Event Definition page.

If the testing agency provides a graduation date, the process uses the mapping defined on the Admit Term Map page to determine an admit term for a prospect. If the admit term mapping is not done or if the testing agency does not provide a graduation date, the process uses the default admit term defined on the Default Prospect Values group box. To navigate to the Admit Term Map page, select Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Admit Term Map.

If the testing agency provides an interest code, the process uses the mapping defined on the Program Plan SubPlan Map page to determine the program, plan and subplan for a prospect. If this mapping is not done or if the testing agency does not provide an interest code, the process uses the default program, plan, and subplan defined on the Default Prospect Values group box. To navigate to the Program Plan SubPlan Map page, select Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Program Plan SubPlan Map.

See "Understanding the 3C Engine" (Campus Community Fundamentals).

Integration Broker Messages (Applicable Only If You Are Posting to CRM)

The system uses the PeopleSoft Integration Broker's Message Segmentation technology to transmit test score data from Campus Solutions to PeopleSoft CRM. When you post a test score record to CRM, the system creates a message for consumption by CRM. To view this message that contains the test score and prospect data:

1. Select People Tools, Integration Broker, Service Operations, Monitor, Monitoring, Asynchronous Services.
2. Click the number link below the New field for the SAD_CRM_DATA queue.

3. Click the Details link for a transaction (You can view the number of segments created and the transaction ID in the message log for the Search/Match/Post Test Score process).
4. Finally, click the Edit XML or the Download XML link on the Asynchronous Details page to view the message data.

To enable segmented messages, you will need to select the Segment Aware option on the Node Definitions page for the remote node defined on the local system.

The message has the following parts:

- Header Record (SAD_HEADER_CRM): The process creates one record for a test ID for each Search/Match/Post process run. This record includes the following fields: TEST_ID, RUN_CNTL_ID, INSTITUTION, ACAD_CAREER, DATE_LOADED, and ADM_RECR_CTR.
- Combined bio demo and prospect record (SAD_BIO_PRS_SUS): This record contains the following fields: TEST_ID, TEST_REC_NBR, EMPLID, BIRTHDATE, LAST_NAME, FIRST_NAME, MIDDLE_NAME, NAME_SUFFIX, NAME_PREFIX, ADDRESS_TYPE, ADDRESS1, ADDRESS2, ADDRESS3, CITY, STATE, COUNTRY, POSTAL, NATIONAL_ID_TYPE, NATIONAL_ID, CAMPUS, INSTITUTION, ACAD_CAREER, SEX, MAR_STATUS, PHONE, PHONE_TYPE, EMAIL_ADDR, E_ADDR_TYPE, ETHNIC_GRP_CD, REG_REGION, SETID, CITIZENSHIP_STATUS, RECRUITING_STATUS, ADM_REFRL_SRCE, ADMIT_TYPE, ADMIT_TERM, ACADEMIC_LEVEL, LAST_SCH_ATTEND, GRADUATION_DT, FIN_AID_INTEREST, HOUSING_INTEREST, and RELIGIOUS_PREF.
- SAD_PRS_PRG_SUS: This record includes a prospect's academic offering suspense table data (such as academic program and plan).
- SAD_PRS_INT_SUS: This record includes a prospect's academic interest suspense table data.
- SAD_PRS_EXT_SUS: This record includes a prospect's extra curricular activities suspense table data.
- Test Score Record (SAD_TST_COM_SUS): This record contains the following fields: TEST_ID, TEST_REC_NBR, TEST_COMPONENT, TEST_DT, LS_DATA_SOURCE, SCORE, SCORE_LETTER, EXT_ACAD_LEVEL, DATE_LOADED, PERCENTILE, TEST_ADMIN, TEST_INDEX0, REV_SCORE_IND, and TEST_ID_OVRD.

The process sets the TEST_ID_OVRD value for only SAT II test components and derives the field value from SAD_SAT_SUS_II.SAD_SAT_II_TEST_ID.

REV_SCORE_IND can contain the following values:

- *U*: Always update the test score.
- *C*: Compare and update if required. This value indicates CRM to update the score if the messaged score is greater than CRM score of the same test ID, component and test date.
- *N*: No Updates. This value indicates CRM to not update the existing CRM score. The process derives this value when SAD_SAT_SUS_I.REV_SCORE_IND_SAT is not equal to Z.
- Name/value pair record (SCC_NAME_VALUE). CRM does not use this record.

Once the messages are created, the Search/Match/Post Test Scores process sets the Search field to *Complete* and Post field to *Purge* on the Test Score Suspense Data page.

The CRM user then uses the PeopleSoft CRM's Manage Import Batches page to import the message data into the CRM production tables.

See the PeopleSoft CRM for Higher Education documentation for information about the Manage Import Batches page.

Data Enrichment to CS and CRM

Regardless of whether you are posting to CRM or Campus Solutions, if the person already exists in Campus Solutions, the process enters the following contact data from the suspense record into the Campus Solutions record if the values do not exist in Campus Solutions for the type entered on the run control page:

- Email
- Address
- Phone Number

For example, let us suppose you have selected phone type as HOME on the run control page and a person already has a phone number (480) 555–1212 with the phone type of HOME in Campus Solutions. The test score has a different phone number, (480) 666–6608, for the person. In this case, the process does not update the phone number in Campus Solutions. The phone number remains (480) 555–1212 in Campus Solutions. Conversely, let us suppose you have selected phone type as OTHER and a person has a phone number (480) 555–1212 with the phone type of HOME in Campus Solutions. The test score has a different phone number, (480) 666–6608, for the person. In this case, the process inserts the phone number (480) 666–6608 with a phone type of OTHER and also retains the HOME phone number of (480) 555–1212 in Campus Solutions.

Regardless of whether you are posting to CRM or Campus Solutions, if the following biographical fields do not have a value in Campus Solutions, the process enters the values from the test scores:

- SSN
- Birthdate
- Gender
- Ethnic Group

If the social security number has a value of 999-99-9999 in Campus Solutions, the process overwrites this value with the social security number provided by the test score. If the biographical fields already have a value, the process does not update the value. For example, if the prospect's birth date is October 8, 1977 in Campus Solutions and the test score has a birth date of October 9, 1977, the process does not update the birth date of the prospect. The birth date remains October 8, 1977

For those testing agencies who send last school attended as part of their layout (ACT, AP, EOS, GMAT, GMASS, SAT and SSS), the process will search against the ACT, ATP, FICE and IPEDS codes in the External Organization Table for a match. The process then sends the External Org ID value to CRM if a match is found. Campus Solutions sends all the other related fields for the External Org ID (Descr, City, State, Postal and Country) to CRM through the External Org EIP.

Setting Up Search Parameters for Test Score Data

Access the Search Parameters page (**Student Recruiting >External Test Score Processing >Search/Match/Post/Test Scores >Search Parameters** or **Student Admissions >External Test Score Processing >Search/Match/Post Test Scores >Search Parameters**).

Except for the Ignore option, rest of the page functionality is similar to the Search Parm's page (**Student Admissions >Application/Transcript Loads >TS130 >Search/Match/Post Process >Search Parm's**).

No Matches Found

<i>Field or Control</i>	<i>Description</i>
New	<i>Ignore</i> : Ignore the unmatched record completely. The process retains the record in the suspense file with the post status of <i>awaiting search/match</i> .

Match(es) Found

<i>Field or Control</i>	<i>Description</i>
One Match and Multiple Matches	<i>Ignore</i> : Ignore the suspense record that matched a record in your database. The process retains the record in the suspense file with the post status of <i>awaiting search/match</i> .

Related Links

[Setting Up Search/Match Parameters](#)

Researching Duplicate Records

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

In the search dialog page of the External Test Score Suspense component, enter the test ID that you want to review, *Complete* in the **Edit Process Option** field, and *Perform* in the **Search/Match Process Option** field. Then click the **Search** button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. Upon entering the component, the Test Score Suspense Data page displays the search/match level involved in the possible match and the number of individuals in the database that match the criteria in the **Search/Match Results** group box.

For example, let's suppose that the **Order Number** field in the **Search/Match Results** group box displayed *40*, and that three matches appear. At PSUNV, Order Number of 40 means that the process is checking for a matching name and gender. Therefore, you know that there are three people in your database with the same name and gender as the person in the suspense record. Use the Search/Match component to look up the name and gender that match the suspense record, and compare the other information (such as address) to determine whether the person in the database is the same as the person in the suspense record. Select Student Recruiting, External Test Score Processing, Search/Match or Student Admissions, External Test Score Processing, Search/Match to access this page.

If the person from the suspense record is *not* the same as a person in your database, set the **Search** field to *Complete* and the Post field to *New ID Add*.

If the person from the suspense record *is* the same as a person in your database, set the **Search** field to *Complete* and the Post field to *Update Existing ID*. Then go to the Personal Information page and enter the ID that you want to update. Note, however, that the search/match/post process only *updates* test score and candidate data information. The process does not update bio/demo data because some bio/demo data may have already been verified.

Rerunning the Search/Match/Post Process

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

The process posts the suspense records where you manually changed the Search/Match processing option to Complete and the Post processing option to New ID Add or Update Existing ID. By this time, all of your suspense records should be posted to your database. When a record posts a new record to your database, the post process assigns an ID to the person.

To view a bio/demo record that the post process created, select **Student Recruiting > External Test Score Processing > Add/Update a Person or Student Admissions > External Test Score Processing > Add/Update a Person**.

To view a test score record that the post process created or updated, select **Student Recruiting > External Test Score Processing > Test Results or Student Admissions > External Test Score Processing > Test Results**.

To view the additional data from the testing agency not posted to Test Results or Add/Update a Person, select **Student Recruiting > External Test Score Processing > Test Score Candidate Data or Student Admissions > External Test Score Processing > Test Score Candidate Data**.

If you chose to create a prospect record, select **Student Recruiting > Maintain Prospects > Add/Update a Prospect**.

Related Links

[Tracking Test Results for Prospects and Applicants](#)

[Entering or Updating Applicant Biographical Data](#)

Purging Suspense Files and Test Score Messages

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

This section discusses how to purge suspense records and test score messages.

Note: If you intend to perform an analysis on your test score processing, do not purge your test score messages with the External Test Score Purge process. Instead, purge them later when you no longer need to view them, using the Test Score Messages Purge process.

Pages Used to Purge Suspense Files and Test Score Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Test Score Purge	SAD_TEST_PURGE	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > External Test Score Purge • Student Admissions > External Test Score Processing > External Test Score Purge 	Purge suspense records and test score messages for a specific test ID.
Test Score Messages Purge	TST_SCORE_PARMS	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Messages Purge • Student Admissions > External Test Score Processing > Test Score Messages Purge. 	Purge all test score messages. You can run a process to purge all test scores remaining in your suspense files for all external test scoreloads.

Purging Suspense Records and Test Score Messages

Access the External Test Score Purge page (**Student Recruiting > External Test Score Processing > External Test Score Purge** or **Student Admissions > External Test Score Processing > External Test Score Purge**).

This example illustrates the fields and controls on the External Test Score Purge page. You can find definitions for the fields and controls later on this page.

External Test Score Purge

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

Test ID

Purge Processing Parameter

☐ All Suspense Rows

Purge Option for All Rows

☐ All Suspense Rows

☐ Rows Loaded before or on

☒ Marked Suspense Rows

Purge Option for Marked Rows

☐ All Marked Suspense Rows

☒ Rows Loaded before or on 31

Message Purge Parameter

☐ Retain Associated Messages

☒ Remove Associated Messages

Field or Control	Description
Test ID	Enter the test ID that you want to delete from the suspense record. The test ID list that appears in the prompt is based on the Test ID Security.
All Suspense Rows	Select this option to enable the Purge Option for All Rows group box.
Marked Suspense Rows	Select this option to enable the Purge Option for Marked Rows group box.

Purge Option for All Rows

Field or Control	Description
All Suspense Rows	Select this option to purge all the suspense records.

Field or Control	Description
Rows Loaded before or on	<p>Select this option and enter a date to purge all suspense records that were loaded on or before the specified date.</p> <p>Use the Date Loaded field on the Test Score Suspense Data page to see when you loaded a record.</p> <p>Suppose you loaded records on May 10, 2009. Subsequently, you loaded another set of records on May 15, 2009. If you select the Rows Loaded before or on option and specify the date as May 15, 2009, the purge process deletes all suspense records that were loaded on May 15, 2009 and May 10, 2009.</p>

Purge Option for Marked Rows

Field or Control	Description
All Marked Suspense Rows	Select this option to purge all the records in your suspense table that are marked <i>Purge</i> in the Post field of the Test Score Suspense Data page.
Rows Loaded before or on	<p>Select this option and enter a date to purge only those suspense records that were loaded on or before the specified date and that are marked <i>Purge</i> in the Post field of the Test Score Suspense Data page.</p> <p>Suppose you loaded records on May 10, 2009. Subsequently, you loaded another set of records on May 15, 2009. If you select the Rows Loaded before or on option and specify the date as May 15, 2009, the purge process deletes the suspense records marked <i>Purge</i> that were loaded on May 15, 2009 and May 10, 2009.</p>

Message Purge Parameter

Field or Control	Description
Retain Associated Messages	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
Remove Associated Messages	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

Reviewing Test Score Candidate Data

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

This section provides an overview of test score candidate data and discusses how to review:

- Candidate data personal information.
- Academic information.
- Student profile high school and college activity information.
- Interest information.

Understanding Test Score Candidate Data

The search/match/post process creates test score candidate data only if you are posting to Campus Solutions. If you are posting to CRM, the process does not create test score candidate data.

The search/match/post process posts candidate data (according to the test) to the Test Score Candidate Data component. This component is informational only. The data in this component does not affect other data in your database. For example, if you change a person's name in this component, it does not change the name anywhere else in the system. If you choose however to create prospects from test scores, some of this data is used for the process, such as graduation date, intended major, and extracurricular activities.

Many of the values and codes that appear in the Test Score Candidate Data components are based on values and codes that the testing agency defines. Contact the testing agency that manages the test for full descriptions of the data that appears in these pages or refer to the test score layout that you received from the testing agency.

Before entering the Test Score Candidate Data component, you must enter the test ID. The pages in the component dynamically appear based on the test ID that you entered. The number of pages that appear in the component depend on the test ID. You must have Test ID Security defined for your user ID in order to access the component. The pages shown here are examples of the Test Score Candidate Data component.

Pages Used to Review Test Score Candidate Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personal Information	SAD_ACT_CD SAD_ADA_CD SAD_AMC_CD SAD_LAW_CD SAD_SAT_CD SAD_SSS_CD	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Personal Information • Student Admissions > External Test Score Processing > Test Score Candidate Data > Personal Information 	This page appears for the ACT, ADA, AMCAS, LSAT/ LSDAS, SAT, and SSS. Review the student's personal information as it was received from the testing agency. The fields vary depending on the test ID. This page also indicates if the post process created an employee ID for this person.
Test Score Candidate Data	SAD_AP_CD SAD_CRS_CD SAD_DAT_CD SAD_EOS_CD SAD_GMT_CD SAD_GRE_CD SAD_GMS_CD SAD_TFL_CD	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Test Score Candidate Data • Student Admissions > External Test Score Processing > Test Score Candidate Data > Test Score Candidate Data 	This page appears for the AP, CRS, DAT, EOS, GMAT, GRE, GMAS, and TOEFL. Review the student's personal and academic information as it was received from the testing agency. The fields vary depending on the test ID. This page also indicates if the post process created an employee ID for this person.
Academics	SAD_ACT_CD_ACAD SAD_LAW_CD_SCH	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Academics • Student Admissions > External Test Score Processing > Test Score Candidate Data > Academics 	This page displays for the ACT and LSAT/LSDAS. Access a student's test and academic data as reported by the testing agency. The fields vary depending on the test ID.
Activities	SAD_ACT_CD_ACT	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Activities • Student Admissions > External Test Score Processing > Test Score Candidate Data > Activities 	This page displays for ACT only. Access student profile high school and projected college activity information.

Page Name	Definition Name	Navigation	Usage
Interests	SAD_ACT_CD_INT	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Interests • Student Admissions > External Test Score Processing > Test Score Candidate Data > Interests 	This page appears for ACT only. Access student profile interest and college preference information.
Education	SAD_ADA_CD_ED	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Education • Student Admissions > External Test Score Processing > Test Score Candidate Data > Education 	This page appears for ADA. Review a student's academic history as reported from AADSAS.
Applicant Data	SAD_ADA_CD_DATA SAD_AMC_CD_OTH	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Applicant Data • Student Admissions > External Test Score Processing > Test Score Candidate Data > Applicant Data 	This page appears for ADA and AMCAS. Review the student's data to support their application for admission as it was received from the testing agency. The fields vary depending on the test ID.
Application	SAD_ADA_CD_APP SAD_AMC_CD_APP	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Application • Student Admissions > External Test Score Processing > Test Score Candidate Data > Application. 	This page appears for ADA and AMCAS. View the results of the Create Applicants from Test process for this student. You can also select not to create an application for this student by selecting <i>Do Not Use for Create Appl</i> in the Post Option field.

Page Name	Definition Name	Navigation	Usage
Courses	SAD_ADA_CD_CRS	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Courses • Student Admissions > External Test Score Processing > Test Score Candidate Data > Courses 	This page appears for ADA. Review a student's academic course work and grades as reported by AADSAS.
Family Information	SAD_ADA_CD_FAMILY	Student Recruiting > External Test Score Processing > Test Score Candidate Data > Family Information Student Admissions > External Test Score Processing > Test Score Candidate Data > Family Information	This page appears for ADA. Review the family information.
Essays	SAD_ADA_CD_ESSAY	Student Recruiting > External Test Score Processing > Test Score Candidate Data > Essays Student Admissions > External Test Score Processing > Test Score Candidate Data > Essays	This page appears for ADA. Review the personal statement data
Colleges	SAD_AMC_CD_COL	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Colleges • Student Admissions > External Test Score Processing > Test Score Candidate Data > Colleges 	This page appears for AMCAS. Review a student's prior colleges attended as well as previous majors and degrees earned, as provided by AAMC.

Page Name	Definition Name	Navigation	Usage
GPA/Hours	SAD_AMC_CD_GPA	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > GPA/Hours • Student Admissions > External Test Score Processing > Test Score Candidate Data > GPA/Hours 	This page appears for AMCAS. Review a student's grade point averages and credit hours, as provided by AAMC.
Awards	SAD_AP_CD_AWRD	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Awards • Student Admissions > External Test Score Processing > Test Score Candidate Data > Awards 	This page appears for AP. Review the student's awards information including award type and year, as reported from the Advanced Placement exam.
Schools	SAD_AP_CD_SCHL	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Schools • Student Admissions > External Test Score Processing > Test Score Candidate Data > Schools 	This page appears for AP. Review a student's high school and college information as reported from the Advanced Placement exam.
Test Data	SAD_AP_CD_TEST SAD_LAW_CD_SB SAD_SAT_CD_TEST	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Test Data • Student Admissions > External Test Score Processing > Test Score Candidate Data > Test Data 	This page appears for the AP, LSAT/LSDas, and SAT. Review additional test data as reported by the testing agency that is not posted to the Test Results page. The fields vary depending on the test ID.

Page Name	Definition Name	Navigation	Usage
Additional Data	SAD_CRS_CD	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Additional Data • Student Admissions > External Test Score Processing > Test Score Candidate Data > Additional Data. 	This page appears for CRS. Review the student's academic, employment, and search-related data, as provided by LSAC.
Prior Schools	SAD_LAW_CD_MATR	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Prior Schools • Student Admissions > External Test Score Processing > Test Score Candidate Data > Prior School. 	This page appears for LSAT/LSDAS. Review undergraduate academic data and prior law schools attended, as provided by LSAC.
Candidate Data	SAD_LAW_CD_CD	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Candidate Data • Student Admissions > External Test Score Processing > Test Score Candidate Data > Candidate Data 	This page appears for LSAT/ LSDAS. Review the student's additional test and application information, as provided by LSAC.
Recommendations	SAD_LAW_CD_REC	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Recommendations • Student Admissions > External Test Score Processing > Test Score Candidate Data > Recommendations 	This page appears for LSAT/ LSDAS. Review letter of recommendation data as provided by LSAC.

Page Name	Definition Name	Navigation	Usage
Student Data	SAD_SAT_CD_STD SAD_SSS_CD_SDQ	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > Student Data • Student Admissions > External Test Score Processing > Test Score Candidate Data > Student Data 	This page appears for SAT and SSS. Review additional information about the student, as provided by ETS. The fields vary depending on the test ID.
School Data	SAD_SAT_CD_SCH	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Candidate Data > School Data • Student Admissions > External Test Score Processing > Test Score Candidate Data > School Data 	<p>This page appears for SAT. Review college preference information for a student. If the test type is <i>college</i>, you can review the high school information for the student, as provided by ETS. If the test type is <i>secondary</i>, you can review the colleges that the student submitted test scores to, as provided by ETS.</p> <p>The data that appears on the page depends on the test type that you selected during the external test score load process.</p>

Reviewing Candidate Data Personal Information

Access the Personal Information page (**Student Recruiting > External Test Score Processing > Test Score Candidate Data > Personal Information** or **Student Admissions > External Test Score Processing > Test Score Candidate Data > Personal Information**).

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

Personal Information
Academics
Activities
Interests

Leoff Fourtnall
ADACT002

Test ID: ACT
ACT Assessment

Test Information
Find | View All
First 1 of 1 Last

Test Date: 11/05/1999
Personal Data Impacts: Caused Personal Data Update

Last Name: Fourtnall
Middle Initial: A

First Name: Leoff
ACT SSN: XXXXXXXX

Birthdate: 19861022
Gender: F

Address 1: 18601 Main St
ACT Citizenship: 1

City: Port Charles
Legal Resident of State: 1

State: NY

Postal Code: 85242
Grade Level: 11

Telephone Number: 602/987-3031
Phone Type: 3

HS Code: 052390
High School Graduation Year: 2005

Email Address: lft890@yahoo.com

ACT Ethnicity: 3
ACT Hispanic or Latino: 2

Ethnic Group Selection

Race Responses
Customize | Find | View All
First 1 of 1 Last

Ethnicity	Ethnic Group	Description
5	WHITE	White

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

Contact Information

☐ Standard Address Format

Address 1Riesstrasse 25

Address 2

Address 3

Address 4

CityMunich

State

Postal Code80992

CountryDEUGermany

Area Code

Daytime Telephone555555555

Mobile0455555555

Other Area Code

Other Phone0425555555

FAX

Email Addressemail@email.com

Proxy Information

Proxy NameJohn Smith

Proxy RelationshipFather

Proxy DOB02/28/1978

Proxy Phone0395555555

Proxy Emailemail@email.com.de

Personal and academic data posted from the suspense record appears in these fields.

Field or Control	Description
Test ID	Displays the test you entered on the search page. The pages to the component vary based on the test ID.
Test Date	Displays the day the person took the test.
Personal Data Impacts	<div>Indicates whether the process added a new EMPLID to your database or updated the personal data for an existing EMPLID.</div> <div>The system displays one of the following values for this field:</div> <div><div><div></div></div><div>Caused Personal Data Creation</div><div><div></div></div><div>No Personal Data Impact</div><div><div></div></div><div>Caused Personal Data Update</div></div>

Reviewing Academic Information

Access the Academics page (**Student Recruiting > External Test Score Processing > Test Score Candidate Data > Academics** or **Student Admissions > External Test Score Processing > Test Score Candidate Data > Academics**).

This example illustrates the fields and controls on the Academics page (1 of 2).

Personal Information		Academics		Activities		Interests	
Leoff Fourtnall		ADACT002					
Test ID: ACT		ACT Assessment					
Test Information Find View All First 1 of 1 Last							
Test Date:	11/05/1999	Personal Data Impacts:	Caused Personal Data Update				
Reporting Year:	95	Sum of Scale Scores:	099				
Test Location:	R						
Academic Information							
GPA:	7	Class Rank:	1				
Major Plan:	410	Class Size:	5				
High School Descr:	1	High School Prog Type:	4				
High School Grades							
English:		Math:					
Social Studies:	4.3	Natural Sciences:	3.4				
HS Average:	3.50						
High School Honors Courses							
English:	1	Math:	1				
Foreign Language:	1	Natural Sciences:	1				
Social Studies:	1						
Financial Aid							
Apply:	1	Work:	1				
Parents Income:	5	Hours Expect to Work:	3				
Father/Guardian 2 Ed Level:	1	Mother/Guardian 1 Ed Level:	4				

This example illustrates the fields and controls on the Academics page (2 of 2).

Years Subjects Studied			Find View All	First	1-8 of 8	Last
Subject		Years of Study				
English		1				+ -
Foreign Language (French)		7				+ -
Foreign Language (German)		6				+ -
Foreign Language (Other)		8				+ -
Foreign Language (Spanish)		5				+ -
Mathematics		2				+ -
Natural Sciences		4				+ -
Social Studies		3				+ -

Academic information data posted from the suspense record appears in these fields.

Reviewing Student Profile High School and College Activity Information

Access the Activities page (**Student Recruiting > External Test Score Processing > Test Score Candidate Data > Activities** or **Student Admissions > External Test Score Processing > Test Score Candidate Data > Activities**).

This example illustrates the fields and controls on the Activities page.

Personal Information		Academics		Activities		Interests	
Bryce Landolf				0049			
Test ID: ACT		ACT Assessment					
Test Information Find View All First ◀ 1 of 1 ▶ Last							
Test Date: 04/01/2006		*Personal Data Impacts: <div>Caused Personal Data Creation ▼</div>					
College Expected Extracurricular Activities Find View All First ◀ 1-8 of 16 ▶ Last							
*Activities		Participation					
Campus or Community Service ▼		<input type="checkbox"/>				+ -	
Departmental Clubs ▼		<input type="checkbox"/>				+ -	
Debate ▼		<input type="checkbox"/>				+ -	
Dramatics, Theater ▼		<input type="checkbox"/>				+ -	
Fraternity or Sorority ▼		<input checked="" type="checkbox"/>				+ -	
Intramural Athletics ▼		<input checked="" type="checkbox"/>				+ -	
Instrumental Music ▼		<input type="checkbox"/>				+ -	
Political Organizations ▼		<input type="checkbox"/>				+ -	
High School Activities Find View All First ◀ 1-8 of 16 ▶ Last							
*Activities		Participated					
Departmental Clubs ▼		<input type="checkbox"/>				+ -	
Debate ▼		<input type="checkbox"/>				+ -	
Dramatics, Theater ▼		<input type="checkbox"/>				+ -	
Fraternity or Sorority ▼		<input type="checkbox"/>				+ -	
Intramural Athletics ▼		<input checked="" type="checkbox"/>				+ -	
Instrumental Music ▼		<input type="checkbox"/>				+ -	
Political Organizations ▼		<input type="checkbox"/>				+ -	
Publications ▼		<input type="checkbox"/>				+ -	

High school and college activities data posted from the suspense record appears on this page.

Reviewing Interest Information

Access the Interests page (**Student Recruiting > External Test Score Processing > Test Score Candidate Data > Interests** or **Student Admissions > External Test Score Processing > Test Score Candidate Data > Interests**).

This example illustrates the fields and controls on the Interests page (1 of 2).

Personal Information		Academics		Activities		Interests	
Bryce Landolf				0049			
Test ID: ACT		ACT Assessment					
Test Information Find View All First ◀ 1 of 1 ▶ Last							
Test Date:		04/01/2006		Personal Data Impacts:		Caused Personal Data Creation ▼	
College Choice Number:		8		College Code Number:		1428	
Interest Inventory							
	Score:	Percentile:					
Science:	71						
Arts:	39						
Social Service:	37						
Business Contact:	43						
Business Operations:	54						
Technical:	60						
Map Regions							
Region 1:		06		Region 2:		07	
				Region 3:		08	
ACT Subscores							
	Enhanced (Scale):	National Norms:		Local Norms:			
Usage/Mechanics	10	55		36			
Rhetorical Skills	09	38		17			
Elementary Algebra	09	39		17			
Algebra/Coordinate Geometry	12	78		59			
Plane Geometry/Trigonometry	12	75		57			
Social Studies/Science	11	59		43			
Arts/Literature	09	38		20			

This example illustrates the fields and controls on the Interests page (2 of 2).

Preference for College					
Student Body Size:	<input type="text" value="3"/>	Gender:	<input type="text" value="1"/>	Type:	<input type="text" value="1"/>
Max Annual Tuition:	<input type="text"/>	State (1):	<input type="text" value="17"/>	State (2):	<input type="text" value="37"/>
State (3):	<input type="text" value="05"/>	State (4):	<input type="text" value="10"/>	State (5):	<input type="text" value="44"/>
Ranking of					
Type College:	<input type="text" value="5"/>	Location:	<input type="text" value="3"/>	Gender:	<input type="text" value="6"/>
Student Body Size:	<input type="text" value="4"/>	Tuition:	<input type="text" value="2"/>	Field of Study:	<input type="text" value="1"/>
Other Factor:	<input type="text" value="7"/>				
Predictive Percentile Ranking					
Overall:	1: <input type="text" value="05"/>	2: <input type="text" value="01"/>	3: <input type="text" value="01"/>	4: <input type="text" value="02"/>	5: <input type="text" value="10"/>
Specific Courses:	1: <input type="text" value="03"/>	2: <input type="text" value="10"/>	3: <input type="text" value="16"/>	4: <input type="text" value="05"/>	5: <input type="text" value="14"/>
Natl Norm - ACT Scale Scores					
Norms Type:	<input type="text" value="0"/>	English:	<input type="text" value="44"/>	Math:	<input type="text" value="59"/>
Reading:	<input type="text" value="41"/>	Science Reason:	<input type="text" value="73"/>	Composite:	<input type="text" value="56"/>
English/Writing	<input type="text" value="--"/>	Writing	<input type="text" value="--"/>		
Writing Score Descriptions					
Description 1	<input type="text" value="--"/>	Description 2	<input type="text" value="--"/>		
Description 3	<input type="text" value="--"/>	Description 4	<input type="text" value="--"/>		

Interest and college preference data posted from the suspense record appears on this page.

Viewing Test Score Messages Summary Information

Important! Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. Support will be maintained for these programs, but no new development will be produced for these programs. It is strongly recommended that you use Prospect/Admissions Data Load (PDL) instead. For more information on PDL, see the Prospect/Admissions Data Load documentation.

This section discusses how to use the Test Score Messages page to view a list of all test score messages stored in your suspense files for any record loaded through an external test score load.

Page Used to View Test Score Messages Summary Information

Page Name	Definition Name	Navigation	Usage
Test Score Messages	TST_SCORE_MSG_TBL	<ul style="list-style-type: none"> • Student Recruiting > External Test Score Processing > Test Score Messages • Student Admissions > External Test Score Processing > Test Score Messages 	View a list of all test score messages stored in your suspense files for any record loaded through an external test score load.

Viewing Test Score Messages Summary Information

Access the Test Score Messages page (**Student Recruiting > External Test Score Processing > Test Score Messages** or **Student Admissions > External Test Score Processing > Test Score Messages**).

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

Test Score Messages

[Find](#) | [View All](#)
First 1 of 38 Last

Test ID:
Record Number:

Process Instance:
Date Loaded:

Last Name:
First Name:

ID:

Record Number: 100326
Process Instance: 204

Last Name: Linden
First Name:

Run Date/Time: 08/13/2004 3:03:59PM
Date Loaded: 08/13/2004

User ID: PS
Process Name: SAD_TST_LOAD

Message Set Number: 14200
Message Number: 125

Message Severity: Message

Message Text:

Description:

Comments:

Field or Control	Description
Test ID	Enter the test ID for which you want to view the test messages. The fields that appear in the prompt are based on your Test ID security.

<i>Field or Control</i>	<i>Description</i>
Record Number	Select the record number for which you want to search for test score messages.
Process Instance	Select the process instance for which you want to search for test score messages.
Date Loaded	Select the date loaded for which you want to search for test score messages.
Last Name	Select the last name for which you want to search for test score messages.
First Name	Select the first name for which you want to search for test score messages.
ID	Select the ID for which you want to search for test score messages.
Search	Click to find information matching your search criteria.

(NZL) Processing NCEA Test Scores

Understanding NCEA Test Score Processing

NCEA is New Zealand's national qualification for senior secondary students. NCEA is part of the National Qualifications Framework (NQF). Through NCEA, students can record their achieved standards, thereby acquiring credits on the NQF, as well as a variety of test results. For example, when students have achieved 80 credits at level 1, they qualify for a NCEA level 1, so long as eight of those credits show numeracy skills and eight other credits show literacy skills.

See Also

www.nzqa.govt.nz/ncea/index.html

Setting Up NCEA Test Data

Before you can load, review, post, or purge NCEA test data, you must complete some setup requirements.

This section discusses how to:

1. Define NCEA test components.
2. Define NCEA test IDs.
3. Map NCEA subject codes to each NCEA test ID component.

Pages Used to Prepare for NCEA Test Score Processing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Component Table	SA_TEST_COMP_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Test Component Table	Define test components to attach to test IDs.
Test Tables	SA_TEST_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Test Tables	Define an NCEA test ID and assign test components.

Page Name	Definition Name	Navigation	Usage
NCEA Subject Code Map	SAD_NCEA_MAPSB_NZL	Student Admissions > Processing Admissions NZL > NCEA Subject Code Map	Map subject codes.

Defining NCEA Test Components

Access the Test Component Table page (**Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Test Component Table**).

This example illustrates the fields and controls on the Test Component Table page.

The screenshot shows the 'Test Component Table' page. At the top, it says 'Test Component: ACCTG'. Below this is a table with one row. The table has columns for 'Effective Date', 'Status', 'Description', and 'Short Description'. The 'Effective Date' is set to '01/01/1900' with a calendar icon. The 'Status' is set to 'Active' with a dropdown arrow. The 'Description' and 'Short Description' are both set to 'Accounting'. There are navigation controls at the top of the table: 'Find | View All | First | 1 of 1 | Last'. There are also '+' and '-' buttons next to the table.

Define NCEA test components.

Related Links

[Defining External Test Components](#)

Defining NCEA Test IDs

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

This example illustrates the fields and controls on the Test Tables page.

Test Tables

Test ID: NCEA

Find | View All First 1 of 1 Last

*Effective Date:01/01/1900

*Status:Active

*Description:NCEA

Short Description:NCEA

Testing Agency:NZ Qualifications Authority

*Component	*Description	*Short Desc	Min Score	Max Score	Subtest
ACCTG	Accounting	Accounting	0.00	0.00	
BIOLY	Biology	Biology	0.00	0.00	
CHEMS	Chemistry	Chemistry	0.00	0.00	
CMPST	Computing Studies	Computing	0.00	0.00	

Add a test ID of NCEA and enter test component details.

Related Links

[Defining External Test Components](#)

Mapping NCEA Subject Codes to each NCEA Test ID Component.

Access the NCEA Subject Code Map page (Student Admissions > Processing Admissions NZL > NCEA Subject Code Map).

This example illustrates the fields and controls on the NCEA Subject Code Map page.

NCEA Subject Code Map

Test ID: NCEA NCEA

Test Component: ACCTG Accounting

Find | View All First 1 of 1 Last

*Effective Date:01/01/1900

*Status:Active

Subject Group Code:1

For each NCEA test component, map a subject group code.

Processing NCEA Test Scores

This section provides an overview of the steps required for NCEA processing, and discusses how to:

- Load NCEA test scores.
- Review NCEA suspense file process options.
- Review basic bio/demo data.
- Review other bio/demo data.
- Review subjects.
- Review standard results.
- Review suspense load messages.
- Post NCEA suspense data.
- Set up search/match parameters for NCEA data.
- Review posted NCEA data.
- Review posted NCEA data details.
- Purge the NCEA suspense files.

Understanding How to Process NCEA Test Scores

To process test scores:

1. Load the test score data from a file in your directory into a suspense table using the NCEA test score load process.

There are four files: Candidate File, Subject Group File, Result File, and Standard File.

2. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the **Edit Processing Option** field and click the **Search** button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the **Edit** field on the Process Options page.

3. After you have corrected all of the load errors, run the search/match/post process.

This process looks for data in your database (based on search parameters that you define on the search/match criteria pages, that can include, for example, name, ID number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a possible match (such as name and gender, for example), the process will not post the record until you can manually determine which records are actually duplicates.

4. View each suspense record that did not get posted to confirm that it is actually a duplicate.

On the Search Dialog page of the Suspense component, enter the NCEA test ID, *Complete* in the **Edit Process Option** field and *Perform* in the **Search/Match Process Option** field. Click the **Search** button. The search process finds only those suspense records that were not posted in the search/match/post process. The search/match/post process does not post records if it encounters a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match. Use Search Match to find the bio/demo information that matches the suspense record and decide whether a person who matches the incoming data already exists in the system. Specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record.

5. Run the search/match/post process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. To view a test score record that the search/match/post process created or updated, use the NCEA Test Results page.

6. Purge the suspense tables.

You should purge the suspense tables as soon as all of the suspense records have been posted to the database. This helps to avoid confusion the next time that you load data into the suspense tables.

7. Review or edit posted test results.

Pages Used to Process NCEA Test Load Data

Page Name	Definition Name	Navigation	Usage
NCEA Load External Data	SAD_RCTL_NCEA_LD_N	Student Admissions > Processing Admissions NZL > NCEA Load External Data	Run the NCEA Data Load SQR process (ADUEBNZL), in order to load NCEA test scores in to the suspense tables.
Process Options	SAD_NCEA_SPROC_NZL	Student Admissions > Processing Admissions NZL > NCEA Suspense > Process Options	View and correct load process results.
Bio/Demo Data	SAD_NCEA_SPBIO_NZL	Student Admissions > Processing Admissions NZL > NCEA Suspense > Bio/Demo Data	Review and edit the student's personal information in the suspense record.
Other Bio/Demo Data	SAD_NCEA_SPOTR_NZL	Student Admissions > Processing Admissions NZL > NCEA Suspense > Other Bio/Demo Data	Review and edit additional personal information in the suspense record.

Page Name	Definition Name	Navigation	Usage
Subjects	SAD_NCEA_SPSUB_NZL	Student Admissions > Processing Admissions NZL > NCEA Suspense > Subjects	Review and edit the student's loaded subject data.
Standard Result	SAD_NCEA_SPSTD_NZL	Student Admissions > Processing Admissions NZL > NCEA Suspense > Standard Result	Review and edit the student's loaded standard result record.
Messages	SAD_NCEA_MSG_NZL	Student Admissions > Processing Admissions NZL > NCEA Suspense > Messages	Review message details from the load process.
Search/Match Parameters	SEARCH_PARMS	Student Admissions > Processing Admissions NZL > NCEA Search/Match/Post > Search/Match Parameters	Define your search/match parameters. These are the rules that determine what the post process should do with the suspense record after the search/match process is complete.
NCEA Post Parameters	SAD_RCTL_NCEAPST_N	Student Admissions > Processing Admissions NZL > NCEA Search/Match/Post > NCEA Post Parameters	Post NCEA test data from suspense files. Before you post the data, however, set up the search/match parameters on the Search/Match Parameters page. You can post a single record or all of the records in the suspense file.
NCEA Test Results	SAD_NCEA_TERES_NZL	Student Admissions > Processing Admissions NZL > NCEA Test Results > NCEA Test Results	View a student's posted NCEA test data.
Additional Test Score Detail	SAD_NCEA_TSTSC_SEC	Click the Details button on the NCEA Test Result page.	Review additional information about a test component.
NCEA Purge Suspense File	SAD_RCTL_NCEAPRG_N	Student Admissions > Processing Admissions NZL > NCEA Purge Suspense File	Purge NCEA suspense records.

Loading NCEA Test Scores

Access the NCEA Load External Data page (**Student Admissions > Processing Admissions NZL > NCEA Load External Data**).

This example illustrates the fields and controls on the NCEA Load External Data page.

NCEA Load External Data

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

Test Parameters

Academic Institution:	PSAUS	PeopleSoft Australia Uni
*NCEA Year:	2004	
*NCEA File Number:	First Examination File	
NCEA File Path 1:	c:\user\NCEA\Second test\Can Two.txt	
NCEA File Path 2:	c:\user\NCEA\Second test\SGS Two.txt	
NCEA File Path 3:	c:\user\NCEA\Second test\Res Two.txt	
NCEA File Path 4:	c:\user\NCEA\Standard_Record.txt	

The NCEA Data Load process loads four files: A candidate record, a subject group summary record, and a result record, (each of which is loaded into suspense and then posted to the profile test results tables), and a standard record, which is loaded each time to provide a temporary look up table. The temporary standard table is used by the load SQR to obtain the subject group for each standard/version on the result record. It is also used to obtain more detail about each standard.

Reviewing NCEA Suspense File Process Options

Access the Process Options page (**Student Admissions > Processing Admissions NZL > NCEA Suspense > Process Options**).

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

Process Options			Bio/Demo Data	Other Bio/Demo Data	Subjects	Standard Result	Messages
NSN:	99132223	NCEA Year:	2004	NCEA File Number:	2		
Last Name:	Nceacandidate	First Name:	Kiwi				
Name 2:	Student	Name 3:					
Processing Options							
Edit:	Complete	Search:	Complete	Post:	Purge		
Error Indicators							
<input type="checkbox"/> Last Name <input type="checkbox"/> First Name							
<input type="checkbox"/> Birthdate							
Search / Match Results							
Order Nbr:	30	Matches:	1				

This page provides the status of a suspense record regarding the loading process. Any informational and error indicators that NCEA data load processes generate appear on this page. You can use this page to keep current on the status of an individual's NCEA processing.

Processing Options

Field or Control	Description
Edit	<p>Displays the status of the load process for this suspense record. The load process populates this value.</p> <ul style="list-style-type: none"> <i>Complete:</i> The load process loaded the data without a problem. This record is ready to be posted. <i>Error:</i> The load process encountered problems when loading the data. <p>The system indicates the values that you must correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to <i>Complete</i>.</p> <ul style="list-style-type: none"> <i>Perform:</i> You set this value manually. <p>This is for informational purposes only.</p>

Field or Control	Description
Search	<p>Displays the status of the search/match process for this suspense record. The search/match process populates this value.</p> <ul style="list-style-type: none"> • <i>Complete:</i> The search/match process completed successfully. • <i>Error:</i> The search/match process encountered problems. Refer to the log file for information regarding the error. • <i>Perform:</i> The search/match process will process this record the next time you run the process.
Post	<p>Displays the status of the record regarding the search/match/post process. These values can be entered manually; however, some are entered by the system after processes are run as described in the table below. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.</p>

Post Value	Meaning	How Set
Delete Update ID	Not used with NCEA.	Not used with NCEA.
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	Not used with NCEA.	Not used with NCEA.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.

Post Value	Meaning	How Set
Update ID	<p>The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record.</p> <p>When set manually, means that the process identified a match and the user determined manually that duplication exists. The system makes available the ID field on the Personal Information page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.</p>	<p>Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times).</p> <p>Set manually.</p>
Wait Srch	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note: While you can manually edit the values in the Edit, Search and Post fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you may experience problems when posting the data.

Error Indicators

Field or Control	Description
Last Name, First Name, and Birthdate	When a load error occurs, the load external data process displays the required values that were missing or incorrect in the load. Go to the Bio/Demo Data page or another page in the NCEA Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box and the fields will no longer appear. After all of the check boxes are cleared and the component is saved, the system enters <i>Complete</i> in the Edit field.


Search/Match Results

<i>Field or Control</i>	<i>Description</i>
Order Nbr (order number)	You know that the search/match process found a match and did not post the suspense record when the Search field contains <i>Perform</i> and displays the search order number that led to the match in the Order Nbr field. Use this information to decide whether or not a possible duplicate exists.
Matches	Displays the number of matches that the process found at order number given.

Reviewing Basic Bio/Demo Data

Access the Bio/Demo Data page (**Student Admissions > Processing Admissions NZL > NCEA Suspense > Bio/Demo Data**).

This example illustrates the fields and controls on the Bio/Demo Data page.

Process Options	Bio/Demo Data	Other Bio/Demo Data	Subjects	Standard Result	Messages
NSN:	99132223	NCEA Year:	2004	NCEA File Number:	2
Last Name:	Nceacandidate	First Name:	Kiwi		
Name 2:	Student	Name 3:			
Personal Information					
ID:	<input type="text"/>				
Gender:	<input type="text" value="Male"/>	Date of Birth:	<input type="text" value="07/17/1986"/> 		
Address 1:	<input type="text" value="75 Stanaway Street"/>				
Address 2:	<input type="text" value="Northcote"/>				
Address 3:	<input type="text" value="Auckland"/>				
Address 4:	<input type="text"/>				
City:	<input type="text"/>	School Code:	<input type="text" value="37"/>		

Review and edit the student's personal information in the suspense record.

Reviewing Other Bio/Demo Data

Access the Other Bio/Demo Data page (**Student Admissions > Processing Admissions NZL > NCEA Suspense > Other Bio/Demo Data**).

This example illustrates the fields and controls on the Other Bio/Demo Data page.

Process Options

Bio/Demo Data

Other Bio/Demo Data

Subjects

Standard Result

Messages

NSN:99132223

NCEA Year:2004

NCEA File Number:2

Last Name:Nceacandidate

First Name:Kiwi

Name 2:Student

Name 3:

NCEA Details

☒ UEBS Citizen

☒ UE Numeracy Achieved

☒ Level 3 Achieved

☒ UE Achieved

☒ UE Literacy Achieved

☐ Scholarship Qual Awarded

Total Credits L3 Achieved:117

Total Credits L3 Not Achieved:

Total Schol Standards Achieved:1

Total Scholl Stds Not Achieved:3

L3 Credits Achvd Previous Yrs:

Review and edit additional personal information in the suspense record.

Reviewing Subjects

Access the Subjects page (Student Admissions > Processing Admissions NZL > NCEA Suspense > Subjects).

This example illustrates the fields and controls on the Subjects page.

Process Options

Bio/Demo Data

Other Bio/Demo Data

Subjects

Standard Result

Messages

NSN:99132223

NCEA Year:2004

NCEA File Number:2

Last Name:Nceacandidate

First Name:Kiwi

Name 2:Student

Name 3:

Find | View All

First1 of 4Last

Test Component:ACCTGAccounting

Total Credits Achieved:24

Total Credits Not Achieved:

Review and edit NCEA subject information in the suspense record. Each component has its own row and details.

Reviewing Standard Results

Access the Standard Result page (Student Admissions > Processing Admissions NZL > NCEA Suspense > Standard Result).

This example illustrates the fields and controls on the Standard Result page.

Process Options	Bio/Demo Data	Other Bio/Demo Data	Subjects	Standard Result	Messages
NSN:	99132223	NCEA Year:	2004	NCEA File Number:	2
Last Name:	Nceacandidate	First Name:	Kiwi		
Name 2:	Student	Name 3:			
<div> <div>Find View All</div> <div>First 1 of 4 Last</div> <div>+</div> <div>-</div> </div>					
Test Component: <div>ACCTG Accounting</div>					
<div> <div>Find View All</div> <div>First 1 of 6 Last</div> <div>+</div> <div>-</div> </div>					
Standard Code:	90500	Version:	1		
Level:	03	Credit Value:	4		
Standard type:	Achievement Standard	Assessment type:	External		
<input type="checkbox"/> UE Approved Subject					
Result:	A	Date Completed:	04/28/2004		

Review and edit NCEA standard result file information in the suspense record. Each component has its own row and corresponding detail rows.

Reviewing Suspense Load Messages

Access the Messages page (**Student Admissions > Processing Admissions NZL > NCEA Suspense > Messages**).

This example illustrates the fields and controls on the Messages page.

Process Options	Bio/Demo Data	Other Bio/Demo Data	Subjects	Standard Result	Messages																												
NSN:	99132223	NCEA Year:	2004	NCEA File Number:	2																												
Last Name:	Nceacandidate	First Name:	Kiwi																														
Name 2:	Student	Name 3:																															
<div>Find View All First 1 of 1 Last</div> <table border="1"> <tbody> <tr> <td>Run Date/Time:</td> <td>07/31/2005 5:15:59AM</td> <td>Process Instance:</td> <td>1130</td> </tr> <tr> <td>User ID:</td> <td>PS</td> <td>Process Name:</td> <td>ADPSTNZL</td> </tr> <tr> <td>Message Set Number:</td> <td>14200</td> <td>Message Number:</td> <td>129</td> </tr> <tr> <td>Message Severity:</td> <td>M Message</td> <td></td> <td></td> </tr> <tr> <td>Message Text:</td> <td colspan="3">Search/Match has been completed.</td> </tr> <tr> <td>Description:</td> <td colspan="3">The Search/Match procedure makes a determination as to whether or not the person might already exist within the system. Based upon the results of the Search/Match and what the run control parameters were set to, the person could be indicated as 'NEW', 'UPDATE', 'SUSPEND' or 'IGNORE'.</td> </tr> <tr> <td>Comments:</td> <td colspan="3">The record has been determined to be a(n) "UPDATE" and the person matched at Search/Match level "30"</td> </tr> </tbody> </table>						Run Date/Time:	07/31/2005 5:15:59AM	Process Instance:	1130	User ID:	PS	Process Name:	ADPSTNZL	Message Set Number:	14200	Message Number:	129	Message Severity:	M Message			Message Text:	Search/Match has been completed.			Description:	The Search/Match procedure makes a determination as to whether or not the person might already exist within the system. Based upon the results of the Search/Match and what the run control parameters were set to, the person could be indicated as 'NEW', 'UPDATE', 'SUSPEND' or 'IGNORE'.			Comments:	The record has been determined to be a(n) "UPDATE" and the person matched at Search/Match level "30"		
Run Date/Time:	07/31/2005 5:15:59AM	Process Instance:	1130																														
User ID:	PS	Process Name:	ADPSTNZL																														
Message Set Number:	14200	Message Number:	129																														
Message Severity:	M Message																																
Message Text:	Search/Match has been completed.																																
Description:	The Search/Match procedure makes a determination as to whether or not the person might already exist within the system. Based upon the results of the Search/Match and what the run control parameters were set to, the person could be indicated as 'NEW', 'UPDATE', 'SUSPEND' or 'IGNORE'.																																
Comments:	The record has been determined to be a(n) "UPDATE" and the person matched at Search/Match level "30"																																

Any messages that the NCEA load process generates appear on this page. Use this page to find the most current information on the status of an individual's NCEA data processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your processing. Therefore, you should purge your NCEA messages only *after* you have completed your analysis.

Posting NCEA Suspense Data

Access the NCEA Post Parameters page (**Student Admissions > Processing Admissions NZL > NCEA Search/Match/Post > NCEA Post Parameters**).

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

NCEA Post Parameters

Search/Match Parameters

Run Control ID: NCEA

[Report Manager](#)[Process Monitor](#)

Run

Search/Match/Post Exec Options

☒ Search, Match and Post

☐ Post Only

☐ Search and Match Only

Post Processing Parameters

Academic Institution:

PSNZL

*NCEA Year:

2004

*NCEA File Number:

First Examination File

☒ Process Single Record

National Student Number:

100840250

Search/Match/Post Exec Options

Field or Control	Description
Search, Match and Post	Select this option if you want the process to search your database for records that match the suspense record and post the suspense data to your database. This is the recommended option.
Post Only	Select this option if you only want to post the suspense data to your database (if you select this option, you must have already run search/match or manually changed the Search and Post process options on the External Test Score Suspense page).
Search and Match Only	Select this option if you only want to run the search and match process on the suspense file. You will need to post the data at a later time.

Post Processing Parameters

Field or Control	Description
Academic Institution	Enter the institution for which you want to post NCEA suspense data.
NCEA Year	Enter the year of the NCEA examination.
NCEA File Number	<p>Specify the examination file you want to post. Values are:</p> <ul style="list-style-type: none"> • <i>First Examination File</i> • <i>Second Examination File</i> • <i>Third Examination File</i> <p>NCEA file number values are delivered with your system as translate values and you should not modify them.</p>
Process Single Record	Select this check box if you want to run the search/match/post process for a single suspense record. The National Student Number field becomes available.
National Student Number	The national student number for the single record you want to process. This field applies only if you have selected the Process Single Record check box.

Setting Up Search Parameters for NCEA Data

Access the Search/Match Parameters page (**Student Admissions > Processing Admissions NZL > NCEA Search/Match/Post > Search/Match Parameters**).

This example illustrates the fields and controls on the Search/Match Parameters page.

NCEA Post Parameters **Search/Match Parameters**

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

*Search Parameter:

No Match Found	Add	Update	Suspend	Ignore
New:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Match(es) Found [Find](#) | [View All](#) 1 of 1

Order Nbr: ☐ ☒ ☐ ☐ *****Parameters Refreshed*****

One Match: ☐ ☒ ☐ ☐

Multiple Matches: ☐ ☐ ☒ ☐

Use this page to set up your search/match parameters. These are the rules that determine what the post process should do with the suspense record after the search/match process is complete.

Related Links

[Setting Up Search/Match Parameters](#)

Reviewing Posted NCEA Data

Access the NCEA Test Results page (**Student Admissions > Processing Admissions NZL > NCEA Test Results > NCEA Test Results**).

This example illustrates the fields and controls on the NCEA Test Results page.

NCEA Test Results

Kiwi Nceacandidate
 RWG002

Find | View All
 First 1 of 1 Last

*Test ID: NCEA NCEA
 ☐ Checklist Item Update

Defaults for Components

Test Date: Data Source: Acad Level:

Find | View All
 First 1 of 1 Last

☒ UE Achieved
 ☒ UE Literacy Achieved

☒ UE Numeracy Achieved
 ☐ Scholarship Qual Awarded

☒ Level 3 Achieved
 L3 Credits Achvd Previous Yrs:

Total Credits L3 Achieved: 117
 Total Credits L3 Not Achieved:

Total Schol Standards Achieved: 1
 Total Scholl Stds Not Achieved: 3

Find | View All
 First 1 of 4 Last

Test Component: ACCTG Test Date: 12/31/2004 Data Source: Extract

Total Credits Achieved: 24
 Total Credits Not Achieved:
 [Detail](#)

Use this page to review a student's loaded NCEA test score data.

Reviewing Posted NCEA Data Details

Access the Additional Test Score Detail page (Click the Details button on the NCEA Test Result page).

This example illustrates the fields and controls on the Additional Test Score Detail page.

Additional Test Score Detail

Test Component: ACCTG

Test Date: 12/31/2004

Data Source: E Extract

Find | View All First 1 of 6 Last

Standard Code: 90500 **Version:** 1

Level: 03 **Credit Value:** 4

Standard type: Achievement Standard **Assessment type:** External

☐ UE Approved Subject

Result: A **Date Completed:** 04/28/2004

Review additional information about an NCEA test component.

Purging the NCEA Suspense Files

Access the NCEA Purge Suspense File page (**Student Admissions > Processing Admissions NZL > NCEA Purge Suspense File**).

<i>Field or Control</i>	<i>Description</i>
NCEA Year and NCEA File Number	When you purge NCEA suspense files, you do so by year and file number. Enter a year and file number that correspond to the suspense records you want to delete.
All Suspense Rows	Select this option if you want to purge all of the records in your suspense table, regardless of the status of the Post field on the Process Options page.
Marked Suspense Rows	Select this option if you only want to purge those records in your suspense file marked <i>Purge</i> in the Post field on the Process Options page. Select this option if you suspect that there are still suspense records that need to be processed. The purge process will only delete suspense records with <i>Purge</i> in the Post field on the Process Options page.
Retain Associated Messages	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
Remove Associated Messages	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

Accessing NCEA Test Data in Display-Only Mode

In some instances, you may want to provide view only or basic summary view access to users. Assign access to the Student Profile component (SAD_NCEA_SPS_NZL) to do so.

This section lists the pages used to view NCEA summary information.

Pages Used to View NCEA Summary Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Bio/Demo Data	SAD_NCEA_S_BIO_NZL	Student Admissions > Processing Admissions NZL > NCEA Student Profile > Bio/Demo Data	Review basic biographical information for an individual.
Other Bio/Demo Data	SAD_NCEA_S_OTR_NZL	Student Admissions > Processing Admissions NZL > NCEA Student Profile > Other Bio/Demo Data	Review biographical and demographic information for an individual.
Subjects	SAD_NCEA_SSUBJ_NZL	Student Admissions > Processing Admissions NZL > NCEA Student Profile > Subjects	Review an individual's NCEA subject record.
Standard Result	SAD_NCEA_S_STD_NZL	Student Admissions > Processing Admissions NZL > NCEA Student Profile > Standard Result	Review an individual's NCEA standard result record.

(AUS) Managing Tertiary Admissions Centre Data Loads

Understanding TAC Data Load Processing

The TACs are the central offices that receive and process applications for admission to participating universities. PeopleSoft Campus Solutions supports the following TAC files:

- Queensland Tertiary Admission Center (QTAC)
- South Australia Tertiary Admission Center (SATAC)
- Victoria Tertiary Admission Center (VTAC)
- ACT and New South Wales Universities Admissions Centre (UAC)

As part of the processing of the student applications, the TACs send electronic offer details to the institutions. PeopleSoft Campus Solutions enables you to upload these offer details.

Preparing for TAC Processing

Before you can process and upload the TAC data loads, you must prepare your system with a variety of setup data, primarily mapping data rules for your institution that coincide with each TAC load that you process.

The following table lists the required setup tasks that must be completed before you import TAC files:

Task	Required for QTAC	Required for UAC	Required for SATAC	Required for VTAC
1. Set up TAC test IDs.	Yes	Yes	Yes	Yes
2. Assign user security to TAC test IDs.	Yes	Yes	Yes	Yes
3. Map TAC test IDs to PeopleSoft test codes.	Yes	Yes	Yes	Yes
4. Set up TAC program codes.	Yes	Yes	Yes	Yes

Task	Required for QTAC	Required for UAC	Required for SATAC	Required for VTAC
5. Set up TAC program code mapping.	Yes	Yes	Yes	Yes
6. Set up DEST (DIIS RTE) number mapping.	Yes	Yes	No	No
7. Set up country code mapping.	Yes	Yes	Yes	Yes
8. Set up state code mapping.	Yes	Yes	Yes	Yes
9. Set up external organizations associated with the qualifications that you want to load.	Yes	Yes	Yes	Yes
10. Define TAC subjects.	Yes	Yes	No	Yes
11. Map year 12 types to external organizations.	Yes	No	No	No
12. Map TAC external institutions to external organizations.	No	No	No	Yes
13. Map origin of qualification values to external organizations.	Yes	No	No	No
14. Map subject codes to external organizations.	Yes	Yes	No	Yes
15. Set up qualification level mapping.	Yes	Yes	No	Yes
16. Set up name prefix mapping.	Yes	Yes	Yes	Yes
17. Add program action reason code for basis of admission mapping.	Yes	Yes	Yes	Yes

Task	Required for QTAC	Required for UAC	Required for SATAC	Required for VTAC
18. Map basis of admission values.	Yes	Yes	Yes	No
19. Map admit type values.	No	No	Yes	No
20. Define citizenship mapping rules.	Yes	Yes	Yes	Yes
21. Set up ethnicity mapping.	No	Yes	No	Yes
22. Set up DIISRTE Language Code Mapping.	Yes	Yes	No	Yes
23. Offer Period Mapping	Yes	No	No	No
24. Honors Category Map	Yes	No	No	No

Pages Used to Prepare for TAC Processing

Page Name	Definition Name	Navigation	Usage
Test Tables	SA_TEST_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Test Tables	Set up TAC test IDs, such as QTAC, VTAC, SATAC, and UAC.
Test ID Security	SAD_TEST_SCTY	Set Up SACR > Security > Secure Student Administration > User ID > Test ID Security	Assign the TAC test IDs that a user can access. The system enforces test ID security in several components throughout the system.

Page Name	Definition Name	Navigation	Usage
External Test Score Mapping	SAD_TEST_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > External Test Score Mapping	Map TAC test IDs to suspense and candidate data records. Map the TAC test IDs you defined on the Test Table page to the Oracle-delivered test code. The system needs this setup to perform a variety of external test-related functions. The PeopleSoft system delivers the following test codes for use with TAC: QTC, STC, UAC, and VTC.
Program Code Table	SSR_PRG_CD_TBL	Set Up SACR > Foundation Tables > Reporting Codes > Program Code Table AUS	Define the TAC program codes to which the applicants will apply through a TAC or TACs.
Acad Prog AUS	SSR_ACAD_PROG_AUS	Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Acad Prog AUS	Map TAC program information to academic programs.
DEST Number Map	SAD_TAC_MAP_DEST	Set Up SACR > Product Related > Recruiting and Admissions > TAC > DEST Number Map	Associate a fact code to a DEST (DIISRTE) reference number for the cases where a fact code relates to DIISRTE Highest Education Attainment information.
Country Map	SAD_TAC_MAP_CNT	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Country Map	Map TAC country codes to the PeopleSoft equivalent country field.
State Code Map	SAD_TAC_MAP_ST	Set Up SACR > Product Related > Recruiting and Admissions > TAC > State Code Map	Map TAC state codes to the PeopleSoft equivalent state field.
Organization Table	EXT_ORG_TABLE	Campus Community > Organization > Create/Maintain Organizations > Organization Table > Organization Table	Enter external organizations codes into the system for posting applicants' external education data and the last school attended. Education data may include an applicant's qualifications.

Page Name	Definition Name	Navigation	Usage
School Subject Maintenance	SCHOOL_SUBJECTS	Campus Community > Organization > Create/Maintain Organizations > School Subject Maintenance	Define academic subjects for the external organizations.
External Organization Map	SAD_TAC_MAP_EXT	Set Up SACR > Product Related > Recruiting and Admissions > TAC > External Organization Map	Map year 12 types, TAC external institutions, origin of qualification values, and subject codes to the external organizations.
Qualification Level Map	SAD_TAC_MAP_QUAL	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Qualification Level Map	Map TAC qualification level codes to PeopleSoft external academic level codes.
Name Prefix Map	SAD_TAC_MAP_PFX	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Name Prefix Map	Map TAC prefixes (MR, MISS, and MS) to general system name prefixes.
Program Action Reason Table	PROG_RSN_TBL	Set Up SACR > Product Related > Student Records > Program Action > Program Action Reason Table	Add program action reasons for the program action of <i>Admit</i> . The TAC Load process assigns these program action reasons to applicants based on the Basis of Admission mapping.
Basis of Admission Map	SAD_TAC_MAP_BOA	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Basis of Admission Map	Map <i>Admit</i> program action reasons to the Basis of Admission codes provided by the TAC.
Admit Type Map	SAD_TAC_MAP_ADM	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Admit Type Map	Associate admit types with basis of admission values.
Citizenship Map	SAD_TAC_MAP_CIT	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Citizenship Map	Map TAC citizenship codes to the citizenship statuses set up for the country AUS and residency codes.
Ethnicity Map	SAD_ETHNICITY_MAP	Set Up SACR > Product Related > Recruiting and Admissions > External Test Scores > Ethnicity Mapping	Map the DIISRTE ethnicity values (Aboriginal or Torres Strait Islander codes related to DIISRTE Element 316) to the corresponding ethnic groups set up for regulatory region AUS.

Page Name	Definition Name	Navigation	Usage
Language Table	SSR_LANG_DEST	Set Up SACR > Product Related > Student Records > Enrolment Reporting Codes > AUS Regulatory Report Setup > Language Table	Map language codes to DIISRTE language codes.
Offer Period Mapping	SAD_TAC_MAP_OFR	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Offer Period Mapping	Map the Offering Month and Year provided in the TAC File to an admit term.
Honors Category Map	SAD_TAC_MAP_HONOUR	Set Up SACR > Product Related > Recruiting and Admissions > TAC > Honors Category Map	Map an honors category to the TAC Honours value provided in the qualification file.

Setting Up TAC Test IDs

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

This example illustrates the fields and controls on the Test Tables page.

Test Tables

Test ID: QTAC

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

*Description: Queensland Tertiary Admission

Short Description: QTAC

Testing Agency: [dropdown]

*Component	*Description	*Short Desc	Min Score	Max Score	Subtest
			0.00	0.00	

Add a test ID for all applicable TACs.

Assigning TAC Test ID Security

Access the Test ID Security page (**Set Up SACR > Security > Secure Student Administration > User ID > Test ID Security**).

This example illustrates the fields and controls on the Test ID Security page.

The screenshot shows the 'Test ID Security' page for user 'SATRN15'. The page has a header with the title 'Test ID Security' and a 'Find' button. Below the header, there are two rows of test ID assignments. Each row has a '*Test ID' column and an '*Access Code' column. The first row shows 'VTAC' as the test ID, which is linked to 'Victoria Tertiary Adm Centre'. The access code is 'Read/Write', and there is an 'All Access' button. The second row shows 'SATAC' as the test ID, which is linked to 'South Aus Tertiary Adm Centre'. The access code is 'Read/Write'. There are '+' and '-' buttons next to the access code dropdowns.

*Test ID	*Access Code
VTAC  Victoria Tertiary Adm Centre	Read/Write  All Access
SATAC  South Aus Tertiary Adm Centre	Read/Write 

Assign the TAC test IDs that a user can access. The system enforces test ID security in several components throughout the system.

Related Links

"Setting Security for Test IDs" (Campus Solutions Application Fundamentals)

Setting Up TAC Test ID Mapping Rules

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

This example illustrates the fields and controls on the External Test Score Mapping page. You can find definitions for the fields and controls later on this page.

External Test Score Mapping

PeopleSoft Test Code QTC Queensland Tertiary Admissions

Mapping
[Customize](#) | [Find](#) | [View All](#) |
First ◀ 1 of 1 ▶ Last

Test ID			
QTAC		Queensland Tertiary Admission	<input type="button" value="+"/> <input type="button" value="-"/>

Suspense Records
[Customize](#) | [Find](#) | [View All](#) |
First ◀ 1-4 of 4 ▶ Last

Record (Table) Name	Record Description	Primary		
SAD_TAC_SUS_ANZ	TAC Suspense Table	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_TC_SFCT_ANZ	TAC Suspense FACT Code Table	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_TC_SQUL_ANZ	TAC Suspense Quals Table	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_TC_SSBJ_ANZ	TAC Suspense Subject Table	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Candidate Data Records
[Customize](#) | [Find](#) | [View All](#) |
First ◀ 1-4 of 4 ▶ Last

Record (Table) Name	Record Description	Primary		
SAD_TAC_SPS_ANZ	TAC Student Profile Table	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_TC_FCT_ANZ	TAC Student Profile FACT Table	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_TC_QUAL_ANZ	TAC Student Prof Quals Table	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_TC_SBJ_ANZ	TAC Main Subject Table	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Field or Control	Description
Test ID	Enter a TAC test ID for each PeopleSoft TAC test code. The PeopleSoft system delivers the following TAC test codes: QTC, VTC, UAC, and STC

Note: On this page, you only have to enter a TAC test ID that corresponds to a PeopleSoft test code. The PeopleSoft system delivers the rest of the page complete. It is important that all TAC test IDs you have defined are mapped to a PeopleSoft test code or you will not be able to load TAC data.

Setting Up TAC Program Codes

Access the Program Code Table page (**Set Up SACR > Foundation Tables > Reporting Codes > Program Code Table AUS**).

This example illustrates the fields and controls on the Program Code Table page.

Program Code Table	
Program Code:	3502
<div style="text-align: right;">Find View All First ◀ 1 of 1 ▶ Last</div>	
Effective Date:	01/01/1900
Status:	Active
*Description:	Bachelor of Commerce
Short Description:	B Com

Set up program codes that map to course codes in the TAC input files.

Mapping TAC Program Codes to Academic Programs

Access the Acad Prog AUS page (Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Acad Prog AUS).

This example illustrates the fields and controls on the Acad Prog AUS (academic program Australia) page (1 of 2). You can find definitions for the fields and controls later on this page.

Taxonomy/Campus Repeat/Incomplete Enrollment Course Dynamic Date Acad Prog AUS	
Academic Institution:	PSAUS PeopleSoft Australia Uni
Academic Program:	BCOM Bachelor of Commerce
<div style="text-align: right;">Find View All First ◀ 1 of 2 ▶ Last</div>	
Effective Date:	01/01/2005
Status:	Active
*Field of Study:	040301 Economics
Field of Education Code:	080301 Business Management
Program Type Code:	10 Bachelor's Pass
Special Program Type:	00 Not Course of Special Interest
Aggregated EFTSL:	30 3 Years
Minimum Units:	360.00
Program Eligibility:	
CRICOS Code:	
<input type="checkbox"/> Combined Course Indicator	
DEST Related Programs <div style="text-align: right;">Customize Find First ◀ 1 of 1 ▶ Last</div>	
Related Academic Program	*Status
1	Active

This example illustrates the fields and controls on the Acad Prog AUS (academic program Australia) page (2 of 2). You can find definitions for the fields and controls later on this page.

The screenshot shows a web form titled "TAC Program Mapping". At the top right, there are navigation links: "Find | View All", and pagination controls showing "First", "3 of 8", and "Last". The form contains the following fields and controls:

- Program Code:** A text input field containing "3502", followed by a magnifying glass icon and the text "Bachelor of Commerce". To the right are "+" and "-" buttons.
- TAC Stream Code:** An empty text input field.
- Academic Load:** A dropdown menu with "Full-Time" selected.
- Academic Plan:** A text input field containing "ACCOUNTING", followed by a magnifying glass icon and the text "Accounting".
- Mode of Attendance:** A dropdown menu with "Internal Mode of Attendance" selected.
- Campus:** A text input field containing "MAIN", followed by a magnifying glass icon and the text "Main Campus".

<i>Field or Control</i>	<i>Description</i>
Program Code	Associate a TAC program code with an academic program that your institution offers. TAC program codes can be mapped to only one academic program.
TAC Stream Code	Applicable to only SATAC and VTAC.
Academic Load	Enter the academic load that the TAC Load process assigns to the admission applications for the program.
Academic Plan	Enter the academic plan that the TAC Load process assigns to the admission applications for the program.
Mode of Attendance	Enter the mode of attendance that the TAC Load process assigns to the admission applications for the program.
Campus	Enter the campus that the TAC Load process assigns to the admission applications for the program.

Associating FACT Codes with DIISRTE Reference Numbers

Access the DEST Number Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > DEST Number Map**).

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

DEST Number Map

Customize Find View All First 1-8 of 8 Last			
	*DEST Reference Number	*Fact Code	
1	DESTQ1	D_Q1	+ -
2	DESTQ2	D_Q2	+ -
3	DESTQ3	D_Q3	+ -
4	DESTQ4	D_Q4	+ -
5	DESTQ5	D_Q5	+ -
6	DESTQ6	D_Q6	+ -
7	DESTQ7	D_Q7	+ -
8	DESTQ8	D_Q8	+ -

DIISRTE - Department of Industry, Innovation, Science, Research and Tertiary - was previously known as DEEWR and before that, as DEST.

For TACs that provide prior education data as FACT codes, associate a FACT code with the applicable DEST Reference Number. The system uses the DEST Reference Number and Fact Code mapping to report highest education attainment so that DIISRTE can track the applicant's prior educational details. The following table lists the DIISRTE (DEST) reference numbers:

<i>DIISRTE Reference Number</i>	<i>Description</i>
1	Post Graduate Program
2	Degree Program
3	Sub Degree Program
4	VET Sub Degree Program
5	VET Award Program
6	VET Secondary Program
7	School Secondary Program
8	Other Program

You can set up FACT codes that are not associated with the applicant's prior education data. In this case, the DEST Reference Number for these FACT codes must be set to *Not DEST*. The *Not DEST* mapping setup is optional, and the system uses this setup for its internal processes.

The TAC Load process posts all FACT codes into suspense records. These codes form a part of the candidate data records after the application is posted, regardless of whether the configuration for these codes is maintained on the DEST Number Map page. The system posts the prior education data into the PeopleSoft database *only* if you have mapped the DEST numbers on the DEST Number Map page.

Note: SATAC provides the prior education data in the applicant file, *not* the FACT file. Therefore, DEST number mapping is optional for SATAC.

To view the student DEST information after you import the TAC data, select **Campus Community > Personal Information > Biographical > Personal Attributes > Student Data AUS**.

Related Links

"(AUS) Entering Student Data" (Campus Community Fundamentals)

Mapping TAC Country Codes

Access the Country Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Country Map**).

Enter the TAC country code that you want to associate with each PeopleSoft country code. The TAC Load process uses this mapping to load the data listed in the following table:

Data	Supplied by QTAC	Supplied by UAC	Supplied by SATAC	Supplied by VTAC
Country of Address	Yes	Yes	Yes	Yes
Country of Birth	No	Yes	Yes	Yes
Country of Citizenship	No	No	Yes	No

Note that for VTAC you must have a row in which TAC Country Code *AUSTRALIA* maps to Country code *AUS*. This mapping is required so that the TAC Load process can load the VTAC residential and postal address data that do not have a country value.

Mapping TAC State Codes

Access the State Code Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > State Code Map**).

Enter the TAC state code that you want to associate with each PeopleSoft state code. The TAC Load process uses this mapping to identify the state values in applicant address data.

Adding Organization Values

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

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

Organization TablePrimary Contact and Dept.School DataVendor InformationBPV Organization Data NLD

External Org ID:QLD

Organization Details

Find | View All

First1 of 1Last

*Effective Date:01/01/1900

*Status:Active

+ -

*Description:Queensland

Long Description:Queensland

Short Description:Queensland

☐ Offers Courses

*Organization Type:School

*Proprietorship:Public

Primary Location

Location:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

City:

Postal:

EDI Address

URL Address

State / Province:

Country:

Add external organization codes that represent the applicants' schools. The TAC Load process uses the organization codes to post applicant's external education and last school attended data.

You must add the following organization codes if you want to import VTAC files:

Organization Code	Description
NON VIC SCH	<p>Add this organization code for non-Victorian secondary school qualification records in the VTAC offer file.</p> <p>If you add this organization code, the TAC Load process assumes the external organization code as <i>NON VIC SCH</i> for qualifications where the School Code is blank.</p>
EXT INSTITN	<p>Add this organization code if you do not want to configure an external organization for each institution that may exist in the overseas qualifications data.</p> <p>If the TAC Load process does not find a mapping between the TAC External Institution Name and an external organization on the External Organization Map page and you have added EXT INSTITN as an organization code, the process assumes EXT INSTITN as the organization code for the post-secondary level overseas qualifications.</p>

Related Links

"Understanding Organizations" (Campus Community Fundamentals)

Defining TAC Subjects

Access the School Subject Maintenance page (**Campus Community > Organization > Create/Maintain Organizations > School Subject Maintenance**).

This example illustrates the fields and controls on the School Subject Maintenance page (1 of 2).

School Subject Maintenance			
Org ID:	QLD	Queensland	
School Subject Find View 1 First 1-4 of 4 Last			
*School Subject:	ACCT	Accounting	+ -
School Subject Details Find First 1 of 1 Last			
*Effective Date:	01/01/1900	*Status:	Active + -
*Description:	Accounting		
Short Description:	Accounting		
*External Subject Area:	ACCT	Accounting	
School Subject Find First 1 of 1 Last			
*School Subject:	ECON	Economics	+ -
School Subject Details Find First 1 of 1 Last			
*Effective Date:	01/01/1900	*Status:	Active + -
*Description:	Economics		
Short Description:	Economics		
*External Subject Area:	ECON	Economics	

This example illustrates the fields and controls on the School Subject Maintenance page (2 of 2).

The screenshot displays two identical forms for maintaining school subjects. Each form has a header section and a details section.

Form 1 (Biology):

- *School Subject:** BIOL (with a search icon) Biology
- School Subject Details:** Find First 1 of 1 Last
- *Effective Date:** 01/01/1900 (with a calendar icon) ***Status:** Active (dropdown menu)
- *Description:** Biology
- Short Description:** Biology
- *External Subject Area:** BIOL (with a search icon) Biology

Form 2 (English):

- *School Subject:** ENGL (with a search icon) English
- School Subject Details:** Find First 1 of 1 Last
- *Effective Date:** 01/01/1900 (with a calendar icon) ***Status:** Active (dropdown menu)
- *Description:** English
- Short Description:** English
- *External Subject Area:** ENGL (with a search icon) English

Enter the TAC subject codes and subject code details that you want to associate with each external organization.

Mapping External Organization Values

Access the External Organization Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > External Organization Map**).

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

External Organization Map

External Org ID:

QLD

Queensland

Year 12 Type

Find | View All

First 1 of 1 Last

***TAC Course Code:**

SEC-QLD-SEP

+

-

External Institution

Find | View All

First 1 of 1 Last

***TAC External Institution Name:**

+

-

Origin of Qualification

Find | View All

First 1 of 1 Last

***TAC Origin of Qualification:**

QLD

+

-

Subject Code Mapping

Customize | Find | View All

First 1-3 of 3 Last

	*Subject Code	*School Subject	Description		
1	0060	BUSN	Business	+	-
2	0001	ENGL	English	+	-
3	0037	MATH	Mathematics	+	-

Year 12 Type

Enter the valid year 12 course codes for this organization. This data corresponds to the year 12 type in the applicant subject file for QTAC.

External Institution

Use this field for VTAC when you want to map overseas institution names to a specific external organization ID. VTAC data related to the Overseas Post Secondary Qualifications contain only an overseas institution name; this field allows you to map an overseas institution to an external organization ID.

You must set up an organization ID with a value of *EXT INSTITN* if you do not want to maintain separate organization IDs for the overseas institutions that may exist in the VTAC overseas qualifications data. If the external institution and external organization ID mapping does not exist, the TAC Load process assigns *EXT INSTITN* as the external organization ID for the overseas qualifications.

Origin of Qualification

Map origin of qualification values to the external organization. The values that you enter here correspond to the origin of qualification values in the application qualification file for QTAC and UAC.

Subject Code Mapping

Map TAC subject codes to the school subjects of the external organization.

Mapping TAC Qualification Levels

Access the Qualification Level Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Qualification Level Map**).

Map TAC qualification level codes to PeopleSoft external academic level codes.

Mapping TAC Prefixes

Access the Name Prefix Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Name Prefix Map**).

Enter the TAC name prefix that you want to associate with each PeopleSoft prefix.

VTAC does not provide name prefixes. Therefore, for VTAC, the TAC Run Search/Match Post process automatically inserts a name prefix of *Mr* if the applicant gender is Male and *Ms* if the applicant gender is female. The TAC Load process does not log any messages related to name prefix mapping because VTAC does not provide the name prefix in its load file.

Defining a Program Action Reason

Access the Program Action Reason Table page (**Set Up SACR > Product Related > Student Records > Program Action > Program Action Reason Table**).

This example illustrates the fields and controls on the Program Action Reason Table page.

Program Action Reason Table			
SetID:	PSAUS		
Program Action:	ADMT Admit		
Action Reason:	37		
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	*Status:	Active
*Description:	Professional Qualification		
Short Description:	Profession		

Map program action reason codes to the program action of *Admit*.

VTAC does not provide a basis of admission. For VTAC, define a program action reason *OFFR* so that the TAC Load process can assign the program action reason *OFFR* to the applications with admission offers.

Mapping Basis of Admissions Values

Access the Basis of Admission Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Basis of Admission Map**).

Map the basis of admission values provided by TAC to the action reasons you defined on the Program Action Reason Table page. The TAC Load process uses this mapping to insert the action reasons into admission applications. Additionally, the PeopleSoft DIISRTE reporting processes use the action reasons to report Element 327 - Basis for Admission to Current Courses.

Related Links

"Understanding the DIISRTE File Generation Process" (Student Records)

Mapping TAC Admit Type Values

Access the Admit Type Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Admit Type Map**).

For SATAC, map external basis of admission codes to admit type values.

Mapping TAC Citizenship Codes

Access the Citizenship Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Citizenship Map**).

Define citizenship mapping rules to map TAC citizenship codes to citizenship statuses and PeopleSoft residency codes.

Mapping Ethnicity

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

The TAC Load process uses this mapping to associate UAC FACT Codes to applicants. UAC FACT Codes provide information about an applicant's Aboriginal and Torres Strait Island origin.

The PeopleSoft DIISRTE reporting processes use the ethnicity codes to report DIISRTE Element 316.

The following table shows the required mapping for UAC.

<i>Ethnic Group</i>	<i>Ethnicity Code</i>
Aboriginal	3
Torres Strait Islander	4
Aboriginal and Torres Strait Islander	5

The following table shows the required mapping for VTAC.

<i>Ethnic Group</i>	<i>Ethnicity Code</i>
Caucasian	2
Aboriginal	3
Torres Strait Islander	4
Aboriginal and Torres Strait Islander	5

The TAC load process uses this VTAC mapping to load the ethnic code from the VTAC *Aboriginal and Torres Strait Islander* offer file element.

Language Mapping

Access the Language Table page (**Set Up SACR > Product Related > Student Records > Enrolment Reporting Codes > AUS Regulatory Report Setup > Language Table**).

Map Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) language codes to the PeopleSoft language codes. The DIISRTE language codes must be the same as the *Language Spoken at Home* values in the TAC load file. The TAC Load process uses this mapping to load the PeopleSoft language code in the TAC suspense component (for example, the TAC load process loads *RU* when it finds *3402* for an applicant in a TAC file). The DIISRTE reporting processes use this mapping to report the DIISRTE language code for element 348 (for example, the DIISRTE reporting processes include *3402* in the extract file when it finds an applicant with a *RU* value in your database).

See "Setting Up DIISRTE Reporting Codes" (Student Records)

Mapping Offer Period

Access the Offer Period Mapping page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Offer Period Mapping**).

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










Offer Period Mapping

Academic Institution: PSAUS PeopleSoft Australia Uni

TAC Code: QTAC

Academic Career: UGRD Undergraduate

Admit Term: 0641 2010 Sem1

Entry Year and Month		Customize Find View All 	First 	1-3 of 3 	Last
	*Offer Year	*Offer Month			
1	2010	FEB			
2	2010	JAN			
3	2010	MAR			

You must have a offer period mapping record for each career and admit term combination.

Field or Control	Description
Copy from Career	Copy a offer period mapping record of a career. The system displays the Copy from Career field when you enter the page on an add mode.
Offer Year and Offer Month	<p>You must enter all the possible offering year and month combinations that may be provided in a TAC file relevant to the career and admit term.</p> <p>When a QTAC File is posted, the TAC Search/Match/Post process will assign the admit term according to the offering year and month mapping for the career applicable to the applicant's program. If there is no mapping for the year and month combination, the admit term on the run control will be assigned.</p> <p>Note: This logic is relevant to only QTAC. For UAC, SATAC and VTAC the system assigns the admit term directly from the TAC load files.</p>

Mapping Honors Category

Access the Honors Category Map page (**Set Up SACR > Product Related > Recruiting and Admissions > TAC > Honors Category Map**).

Field or Control	Description
TAC Honors Code	Enter the honors code provided in the TAC Qualifications file.
Honors Category	Enter the PeopleSoft honors category applicable to the TAC honours code.

Note: You should perform this mapping only if you are loading QTAC data.

Processing TAC Loads

This section provides an overview of TAC processing and discusses how to set up load parameters and load the file.

Understanding TAC Data Load Processing

Recruiting and Admissions supports loading the data files received from the following TACs: QTAC, SATAC, UAC, and VTAC. The data files contain personal information, previous education data, year 12 results, and details of offer or preferences. For each TAC, you first load data into suspense tables. Then run the search/match process to verify whether there is an existing record for the applicant in the system. Finally, post the bio/demo and remaining applicant data to your database. The Search/Match/Post process posts self-reported academic information to TAC candidate data tables so that the system maintains the history of data provided with the application. You follow this process for each TAC.

Regardless of the TAC, the same components are used to load, view, post, and purge TAC data. The test ID of the TAC you are processing must be entered on each component. The entry of the TAC test ID determines which fields appear on each page. The TAC test IDs shown in the prompt are based on your TAC test ID security. You must have test ID security defined in order to process TAC data loads.

See "Setting Security for Test IDs" (Campus Solutions Application Fundamentals).

To process TAC data:

1. Use the TAC Load process to load the TAC data from one or more files in your directory into the suspense tables.
2. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search page of the TAC Suspense component, enter the TAC test ID, *Error*; in the **Edit Processing Option** field and click the **Search** button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the **Edit** field on the Process Options page.

3. After you have corrected all of the load errors, run the search/match/post process.

This process looks for data in your database, based on search parameters that you define on the search/match criteria pages, that matches the data that you are posting. For a set of parameters that suggest only a possible match (such as name and gender, for example), the process will not post the record until you can manually determine which records are actually duplicates.

4. Access each suspense record that did not get posted to confirm the appropriate post action to assign to the applicant.

In the search page of the TAC Suspense component, enter the TAC test ID, *Complete* in the **Edit Processing Option** field and *Perform* in the **Search/Match Processing Option** field. Then click the **Search** button. The search process finds only those suspense records that went through the search/match/post process but do not have a post processing option of *New ID Add* or *Update ID*. The reason the search/match/post process does not assign a *New ID Add* or *Update ID* post processing option is because of the settings on the **Search Parm** page. If the system finds multiple or partial matches for applicants and the setting for these matches are set to suspend, you must manually determine whether to post or ignore these applicant records. After you access the TAC Suspense component, find the parameters for which the process identified a match, then use Search/Match to look up the bio/demo information that matches the suspense record and verify whether a person in the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and TAC record to your database, update an existing record, or ignore the suspense record altogether.

5. Run the search/match/post process again.

The process posts the suspense records that you manually tagged to post. In addition, the process posts the suspense records that went through the Search/Match process and are ready to be posted. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the applicant. To view an applicant's ID, select **Student Admissions > TAC Processing > TAC Suspense > Personal Information** or **Student Admissions > TAC Processing > TAC Candidate Data > Personal Information**.

6. Purge the suspense tables.

You should purge the suspense tables as soon as all of the suspense records are posted to the database.

7. Review TAC Candidate Data. (optional)

After the system posts the TAC application data, you can view this data on the TAC Candidate Data component.

Page Used to Load TAC Data

Page Name	Definition Name	Navigation	Usage
TAC Load	SAD_TAC_LOAD_RUN	Student Admissions > TAC Processing > TAC Load	<p>Specify a TAC test ID and designate the directory location for each of the TAC files. Run the load process.</p> <hr/> <p>Note: You should complete the full loading, search/match and posting process before loading a new set of data. If you have TAC loads waiting to be processed, do not load a new TAC file until you have processed the data in your suspense files.</p> <hr/>

Setting Up Load Parameters and Loading the File

Access the TAC Load page (**Student Admissions > TAC Processing > TAC Load**).

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

TAC Load

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

Test ID: Queensland Tertiary Admission

Parameters

Academic Institution: PeopleSoft Australia Uni

Date Loaded:

File Input Path #1:

File Input Path #2:

File Input Path #3:

File Input Path #4:

The number of input files that you can use depends on the TAC test ID that you enter. For example, the TAC Load page displays five file input fields for UAC and thirteen file input fields for SATAC.

The following table indicates the type of data you must load with the various File Input Path fields.

File Number	QTAC	UAC	SATAC	VTAC
File Input Path # 1	Applicant	Applicant	Applicant	Offer File
File Input Path # 2	FACT	FACT	Academic Qualifications	
File Input Path # 3	Qualifications	Qualifications	Other Qualifications	
File Input Path # 4	Subject	Subject	Employment Qualifications	
File Input Path # 5		Preferences	Year 12 Subjects	
File Input Path # 6			Preferences	
File Input Path # 7			Preference Course Rank Set	

File Number	QTAC	UAC	SATAC	VTAC
File Input Path # 8			FACT	
File Input Path # 9			International Applicants Personal Additional Data	
File Input Path # 10			Origin Codes	
File Input Path # 11			Year 12 School Codes	
File Input Path # 12			Employment and Occupation Codes	
File Input Path # 13			HEIMS	

Field or Control	Description
Test ID	Enter the TAC test ID that you want to load. Define TAC test ID values on the Test Tables page. Once the TAC test ID is entered, the additional fields specific to the TAC will appear. You must have test ID security established in order to select a value. This field is required.
Academic Institution	Enter the institution for which you want to load the data.
Admit Type	Applicable to only SATAC and VTAC. Enter a value only if applicants do not have an admission offer (basis of admission).
Date Loaded	Enter the date of the data load process. The system populates this field to the current date by default.
Processing Indicator	Applicable to only VTAC. Select a value applicable to the offer file that you want to load. You must select <i>Undergrad</i> for an undergraduate offer file and <i>Graduate</i> for an offer file that contains postgraduate applicant records.
Initial Course Character	Applicable to only SATAC. Use to filter and load preferences relevant to your institution. The TAC Load process selects only those courses from the preferences file that commence with the character that you enter in this field.

Field or Control	Description
Offers	<p>Applicable to only SATAC.</p> <p>Select to load only those courses from the preferences file that TAC has offered to the applicants</p> <p>If you do not select this check box, the TAC Load process loads all the preferences depending on the Initial Course Character value.</p>
File Input Path	<p>Enter the path of the directory and file where the TAC data resides. These fields are required. How you complete the fields depends on the TAC you are processing. In order for the upload to work correctly, you must list the input files in the correct order.</p>
Run	<p>Click the run button to run the SAD_TAC_LOAD Application Engine process at user-defined intervals.</p>

Note: To check for errors during the program run, review the trace file created by the Application Engine program. Nonfatal errors will appear in the Error Indicators group box in the TAC Suspense component.

Reviewing and Editing Data in the Suspense Record

This section provides an overview of the suspense phase and discusses how to:

- Review process options.
- Review personal information.
- Review and edit data in the suspense record.

Understanding, Correcting, and Editing Suspense Data

Before entering the TAC Suspense component, you must enter the TAC test ID. The pages in the component dynamically appear based on the TAC test ID you enter. The pages in the component are very similar in the way they look and work. For example, every suspense component has a Personal Information page. In addition, they all share the first page – Process Options. Many of the values and codes that appear in the suspense component are based on values and codes that the TAC defines. Contact the TAC that manages the application for full descriptions of the data that appears in these pages or refer to the data layouts you receive from the TAC.

Note: Data in suspense tables does not affect tables in your database until you post the data. In addition, if you find an error in the suspense component after you post the data, you have to go to the appropriate page in your database to make any changes. For example, if you find an error on the Personal Information page in the Suspense component, you have to go to the Add/Update a Person component to correct the error.

Pages Used to Review and Edit Suspense Data

Page Name	Definition Name	Navigation	Usage
Process Options	SAD_TAC_SUS_PROC	Student Admissions > TAC Processing > TAC Suspense > TAC Suspense > Process Options	Review the status of a TAC record regarding the loading, search/match, and posting processing. For example, determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors or warnings were encountered during the load or search/match/post processes.
Personal Information	SAD_TAC_SUS_BIO	Student Admissions > TAC Processing > TAC Suspense > Personal Information	Review and edit the student's personal information in the suspense record. Refer to the data layouts from the TAC to determine the fields that the load process will populate. Each TAC has a Personal Information page. The data will vary depending on the TAC.
Address	SAD_TAC_SUS_ADDR	Student Admissions > TAC Processing > TAC Suspense > Address	This page appears only when the TAC applicant file contains more than one address. Review and edit the address information for the applicant, if necessary. Note that country and state code mappings are required for loading address data.
Qualifications	SAD_TAC_SUS_QULSA	Student Admissions > TAC Processing > TAC Suspense > Qualifications	Review and edit detailed information about the student's qualifications. These details populate the external education data as part of the posting process.
Subjects	SAD_TAC_SUS_SBJSA	Student Admissions > TAC Processing > TAC Suspense > Subjects	Review and edit information about subject courses taken by the student. This data populates external education data as part of the posting process.

Page Name	Definition Name	Navigation	Usage
Offers	SAD_TAC_SUS_OFFER	Student Admissions > TAC Processing > TAC Suspense > Offers	Review and edit basic applicant and offer details. The data from this page is used during the posting process to populate admission applicant data and admission applicant program data.
Fact	SAD_TAC_SUS_FACT	Student Admissions > TAC Processing > TAC Suspense > Fact	Review and edit information about the Fact codes and values. These Fact codes contain data for DIISRTE statistical reporting and other items specific to the TAC or institution or both.
Residency	SAD_TAC_SUS_RES	Student Admissions > TAC Processing > TAC Suspense > Residency	Review and edit residency details and additional DIISRTE reporting fields about the student. Data from this page is used to populate residency and DIISRTE reporting fields as part of the posting process.
Preferences	SAD_TAC_SUS_PRFS	Student Admissions > TAC Processing > TAC Suspense > Preferences	Review and edit information about applicant preferences. The data from this page is used during the posting process to populate the applicant program data table.
VIC Data	SAD_TAC_SUS_VIC_O2	Student Admissions > TAC Processing > TAC Suspense > VIC Data	Review and edit biographical and demographic information for this student from the Victorian TAC.
Common Assessment Tasks	SAD_TAC_SUS_CAT	Student Admissions > TAC Processing > TAC Suspense > Common Assessment Tasks	Review and edit information about the Common Assessment Tasks for applicants from the Victorian TAC.
VIC Results	SAD_TAC_SUS_VIC_RS	Student Admissions > TAC Processing > TAC Suspense > VIC Results	Review and edit information about result summaries for applicants from the Victorian TAC.
VCAL Studies	SAD_TAC_SUS_VCL	Student Admissions > TAC Processing > TAC Suspense > VCAL Studies	Review and edit information about VCAL studies for applicants from the Victorian TAC

Page Name	Definition Name	Navigation	Usage
VCAL Units	SAD_TAC_SUS_VCU	Student Admissions > TAC Processing > TAC Suspense > VCAL Units	Review and edit information about VCAL units for applicants from the Victorian TAC.
Assessment Data	SAD_TAC_SUS_VIC_AS	Student Admissions > TAC Processing > TAC Suspense > Assessment Data	Review and edit information about assessment data related to graduate entry teaching for applicants from the Victorian TAC.
PCRS (preference course rank set)	SAD_TAC_SUS_PCRSA	Student Admissions > TAC Processing > TAC Suspense > PCRS	The data on this page is internal to the way students' eligibility rankings are determined. South Australian institutions can refer to this data.

Reviewing Process Options

Access the Process Options page (**Student Admissions > TAC Processing > TAC Suspense > TAC Suspense > Process Options**).

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

Process Options				Personal Information	Qualifications	Subjects	Offers	Fact																
Last Name:	Xthomas			External Application Nbr:	261001541																			
First Name:	Leona			Date Loaded:	07/11/2006																			
Middle Name:	Maureen Dhu			Test ID:	QTAC																			
Processing Options																								
Edit:	Complete		Search:	Complete		Post:	Purge																	
Search / Match Results																								
Order Number:	30		Matches:	3																				
Messages																								
				Customize Find View All First 1-3 of 3 Last																				
<table border="1"> <thead> <tr> <th>Message Severity</th> <th>Message Text</th> <th>Description</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>1 Message</td> <td>Postal code not able to be mapped to Region</td> <td></td> <td>Postal code not able to be mapped to Region (14902,107)</td> </tr> <tr> <td>2 Message</td> <td>The Student has been determined this student to be 'NEW'.</td> <td></td> <td>The record has been determined to be a "NEW" record.</td> </tr> <tr> <td>3 Message</td> <td>No School Code was provided</td> <td></td> <td>No School Code was provided (14902,130)</td> </tr> </tbody> </table>									Message Severity	Message Text	Description	Comments	1 Message	Postal code not able to be mapped to Region		Postal code not able to be mapped to Region (14902,107)	2 Message	The Student has been determined this student to be 'NEW'.		The record has been determined to be a "NEW" record.	3 Message	No School Code was provided		No School Code was provided (14902,130)
Message Severity	Message Text	Description	Comments																					
1 Message	Postal code not able to be mapped to Region		Postal code not able to be mapped to Region (14902,107)																					
2 Message	The Student has been determined this student to be 'NEW'.		The record has been determined to be a "NEW" record.																					
3 Message	No School Code was provided		No School Code was provided (14902,130)																					

This page provides the status of a suspense record regarding the loading, search/match and posting processes. Any informational and error messages that TAC data load and search/match/post processes

generate appear on this page. You can use this page to keep current on the status of an individual's TAC processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your TAC processing. To do so, you would need to wait to purge your TAC messages until you have completed your analysis.

Processing Options

Field or Control	Description
Edit	<p>Displays the status of the record regarding the Load External Data process. Values are:</p> <p><i>Complete:</i> The program was able to process the record without a problem.</p> <p><i>Error:</i> The program encountered problems when processing this record.</p> <p><i>Perform:</i> This value is only set manually and is for your informational purposes.</p>
Search	<p>Displays the status of the record regarding the Search/Match process. Values are:</p> <p><i>Complete:</i> The Search/Match process was run without errors.</p> <p><i>Error:</i> The Search/Match process was run and errors were detected on this record.</p> <p><i>Perform:</i> The Search/Match process has not yet been run for this record.</p>
Post	<p>Displays the status of the record regarding the Post process. These values can be entered manually, however, some are entered by the system after processes are run, as described in the following table.</p>

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the Post process.
New ID Add	The system was unable to find a match in the database and will add a record with a new ID to your database when the Post process is run.	Set by the system during the Search/Match process if no match was found in your database.

Post Value	Meaning	How Set
Take No Action	This value is only added manually. It is not automatically entered by the system. If this value is entered, the Post and Purge Suspense File processes ignore the record.	Set manually.
Purge	This value indicates that this suspense record will be removed from the system during the Purge Suspense File process.	Set by the system during the Post process if the record was successfully processed or if the Search/Match process ignored the suspense record that matched a record in your database.
Update existing ID	The system found a matching ID in the database. This existing ID record will be updated with the data from this TAC record during the process.	Set by the system during the Search/Match process if a match was found in the database and if your TAC Search Parameters define that an update should occur in this situation.
Awaiting Search	This record is in the Suspense File and is waiting to be processed by the Search/Match process.	Set by the system during the TAC Load External Data process.

Warning! While you can manually edit the values in the **Edit**, **Search**, and **Post** fields, keep in mind that if a field contains Error and you manually change it without correcting an error, you may encounter problems when posting the data. **Edit**, **Search**, and **Post** values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming effort.

Error Indicators

If *Error* appears in any of the Processing Options fields, the **Error Indicators** group box appears in the areas an error occurred: *Last Name*, *Birth Date*, *First Name* and *Academic Program Error*. Correct any errors on the appropriate pages in this component before running the post process. When you save the changes, the processing options on the page update appropriately. For example, if the **Edit** field displays *Error*, and you fix the error, the program updates the **Edit** field to *Complete*. You can view additional information about these errors in the **Messages** group box on the Process Options page.

Search/Match Results

In the **Search/Match Results** group box, the system displays the order number of the search level used to find a match for this person. Search order levels are defined on the Search/Match Criteria page. Additionally, the system displays the number of matches found for this person.

Messages

Field or Control	Description
Message Severity	The message severity, such as <i>Message</i> or <i>Error</i> .
Message Text	The message on this row of data.
Description	The detailed message.
Comments	Results or other additional information about the message.
Process Instance	The process number of the process that you ran for this record. The Process Scheduler generates this number.
Run Date/Time	The day and time the process ran for this record.
Process Name	The name of the application engine that you ran for this record.
User ID	The user ID of the person who ran the process.

Reviewing Personal Information

Access the Personal Information page (**Student Admissions > TAC Processing > TAC Suspense > Personal Information**).

This example illustrates the fields and controls on the Personal Information page (1 of 2).

Process Options	Personal Information	Address	Residency	Qualifications	Subjects	Offers	Preferences	VIC Data	D
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Last Name	<input type="text" value="Wilson"/>	External Application Nbr	98765002A
First Name	<input type="text" value="Heather"/>	Date Loaded	12/07/2018
Middle Name	<input type="text" value="Nikki"/>	Test ID	VTAC

Personal Information	
<div>ID <input type="text" value="NEW"/></div> <div>Applicant Number <input type="text"/></div> <div>Name Prefix <input type="text"/></div> <div>Gender <input type="text" value="Female"/></div> <div>Other Name <input type="text"/></div> <div>Other Name 2 <input type="text"/></div> <div>Previous First Name <input type="text"/></div> <div>Previous Second Name <input type="text" value="NICOLE"/></div> <div>Date of Birth <input type="text" value="11/17/1999"/> </div> <div>Birth Country <input type="text" value="AUS"/> Australia</div> <div>Citizenship <input type="text" value="Citizen"/></div> <div>FEE-HELP Balance <input type="text" value="0.00"/></div> <div>DEST As At Date <input type="text"/> </div> <div>Year 12 Location <input type="text"/></div>	<div><input checked="" type="checkbox"/> OK to Post</div> <div>CHESSN <input type="text" value="5666342112"/></div> <div>TAC Birthdate</div> <div>School Postcode <input type="text"/></div>

This example illustrates the fields and controls on the Personal Information page (2 of 2).

Contact Information	
<input type="checkbox"/> Standard Address Format	
Address 1	Riesstrasse 25
Address 2	
Address 3	
Address 4	
City	Munich
State	<input type="text"/>
Postal Code	80992
Country	DEU Germany
Area Code	<input type="text"/>
Daytime Telephone	5555555555
Mobile	0455555555
Other Area Code	<input type="text"/>
Other Phone	0425555555
FAX	<input type="text"/>
Email Address	email@email.com
Proxy Information	
Proxy Name	John Smith
Proxy Relationship	Father
Proxy DOB	02/28/1978
Proxy Phone	0395555555
Proxy Email	email@email.com.de

This page contains all biographical and demographic data loaded into the suspense table when a new record is posted.

Reviewing Address Information

Access the Address page (**Student Admissions > TAC Processing > TAC Suspense > Address**).

This example illustrates the fields and controls on the Address page.

Process Options	Personal Information	Address	Residency	Qualifications	
Last Name:	Glover	External Application Nbr:	123000018		
First Name:	John	Date Loaded:	02/13/2007		
Middle Name:		Test ID:	SATAC		
Current Address					
Address 1:	<input type="text" value="15 GINGER CRESCENT"/>				
Address 2:	<input type="text"/>				
Address 3:	<input type="text"/>				
Address 4:	<input type="text"/>				
City:	<input type="text" value="DEERPARK"/>				
State:	<input type="text" value="VIC"/> Victoria				
Postal:	<input type="text"/>				
Country:	<input type="text" value="AUS"/> Australia				
Residential Address					
Address 1:	<input type="text" value="18 Longbeach Road"/>				
Address 2:	<input type="text" value="Somerset"/>				
Address 3:	<input type="text"/>				
Address 4:	<input type="text"/>				
City:	<input type="text" value="Melbourne"/>				
State:	<input type="text" value="VIC"/>				
Postal:	<input type="text" value="3000"/>				
Country:	<input type="text" value="AUS"/>				

Use this page to view applicant's current and residential addresses, if supplied by TAC. SATAC may provide both the addresses. VTAC may provide a residential address which appears in this page.

Reviewing Residency Information

Access the Residency page (**Student Admissions > TAC Processing > TAC Suspense > Residency**).

This example illustrates the fields and controls on the Residency page.

Process Options		Personal Information		Address		Residency		Qualifications	
Last Name:	Anderson			External Application Nbr:	27005784L				
First Name:	Saverio			Date Loaded:	23/09/2009				
Middle Name:				Test ID:	VTAC				
Residency									
Perm Residency:	<input type="text"/>			Citizenship:	<input type="text" value="5"/>				
Residency:	<input type="text" value="AUS"/>			Australian Resident					
Home Residency:	<input type="text" value="5045"/>			Permanent Residency Date:	<input type="text"/>				
Apply for Home Residency:	<input type="text"/>			Application Check:	<input type="text"/>				
Citizenship Country:	<input type="text"/>								
Language Indicator:	<input type="text" value="E"/>			Language Code:	<input type="text" value="EN"/>				
Method A:	<input type="text"/>			Method B:	<input type="text"/>				
Consulate:	<input type="text"/>								
Passport First Name:	<input type="text"/>								
Passport Middle Name:	<input type="text"/>								
Passport Last Name:	<input type="text"/>								
Final Applicant Decision:	<input type="text"/>			Enrollment Indicator:	<input type="text"/>				
Ethnicity:	<input type="text" value="2"/>			Applicant Born Indicator:	<input type="text" value="A"/>				
Year Arrival:	<input type="text"/>			Enrollment Preference Number:	<input type="text"/>				
Highest Attain:	<input type="text"/>								
Highest Education Parent/Guardian 1:	<input type="text" value="59"/>			Unknown					
Highest Education Parent/Guardian 2:	<input type="text" value="49"/>			Unknown					

Use this page to view the applicant's biographical and demographical information if supplied by TAC.

To post the Highest Education Parent/Guardian 1 and Highest Education Parent/Guardian 2 data, you must ensure that the configuration for DIISRTE Elements 573 and 574 is complete (Set Up SACR, Product Related, Student Records, Enrolment Reporting Codes, AUS Regulatory Report Setup, Highest Education).

The TAC Run Search/Match Post process posts the information from these two fields to the Student Data AUS component (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Student Data AUS).

Reviewing Qualification Information

Access the Qualifications page (**Student Admissions >TAC Processing >TAC Suspend >Qualifications**).

This example illustrates the fields and controls on the Qualifications page.

Process Options		Personal Information		Residency		Qualifications		Subjects	
Last Name:	Beethoven			External Application Nbr:	730512311				
First Name:	Anthony			Date Loaded:	25/06/2009				
Middle Name:				Test ID:	QTAC				
Qualifications Find View All First 1 of 1 Last									
Ext Org ID:	000010092			Landmark College					
Level:	6			TAC Origin of Qualification:	3019				
TAC Course Code:	Ter-BACHELOR-1								
TAC Course Title:	B-Arts								
Year:	2005			Institution/Course Code:	2000				
Type:				Start Year:	1999				
Field of Study:	090000			Result Number:					
Student Nbr:	40793867			FTE:	0.500000				
VTAC State:				Result:	67.100				
Number:	2			Honors Category:	Magna				
Rank:	73			Status:					
Level VET:				VET Type:					
School Code:									

The information on the Qualifications page will vary depending on the TAC. For example, the page displays **TAC Origin of Qualification** and **School Code** fields only for QTAC.

Reviewing Subjects Information

Access the Subjects page (**Student Admissions >TAC Processing >TAC Suspense >Subjects**).

This example illustrates the fields and controls on the Subjects page.

Process Options		Personal Information		Residency		Qualifications		Subjects	
Last Name:	Beethoven	External Application Nbr:	730512311						
First Name:	Anthony	Date Loaded:	24/06/2009						
Middle Name:		Test ID:	QTAC						

Subjects		Find View All		First 1 of 7 Last	
External Org ID:	000000001	Cottonwood High School			
TAC Course Code:	SEC-QLD-SEP	Semester:	4		
Number:	1	Type:	SBSU		
Level:	5	Fact Score:			
Estimated Score:		TAC Subject Title:	ENGLISH		
Code:	001	Results:	VH		
Year:	2003	Old Subject Grade:			
Old Subject Mark:		Unit 2 Result:			
Unit 1 Result:		Unit 4 Result:			
Unit 3 Result:		Year 12 Year:	2003		
Avg CAT Grade:		TAC State Code:	QLD		

The information on the Subjects page will vary depending on the TAC.

Reviewing Preferences

Access the Preferences page (**Student Admissions >TAC Processing >TAC Suspense >Preferences**).

This example illustrates the fields and controls on the Preferences page.

Qualifications		Subjects		Preferences		Offers		PCRS		Fact	
Last Name:	Lawson	External Application Nbr:	123000022								
First Name:	John	Date Loaded:	02/13/2007								
Middle Name:	Volvo	Test ID:	SATAC								
Preference Data Find View All First 1 of 1 Last + -											
Academic Program:	BART										
Program Code:	114021										
Preference Nbr:	1										
Course Title:	B PHARMACY										
TAC Plan:											
Offer Round Number:	5										
TAC Stream Title:											
TAC Stream Code:											
Offer Date:	02/13/2007 31										
Offer Response:											
CAS Value:	YES										
CAS type:	CAS										
Admission:	31										
Date	08/28/2006 31										
Offer Status:	Y										
CAS Reason:	Allocatable.										
Admission:	CRSSA3TH_CALC - Allocation										

The information on the Preferences page will vary depending on the TAC. The system does not display this page for QTAC.

Reviewing VTAC Data

Access the VIC Data page (**Student Admissions >TAC Processing >TAC Suspense > VIC Data**).

This example illustrates the fields and controls on the VIC Data page.

Address		Residency		Qualifications		Subjects		Offers		Preferences		VIC Data		VIC Results	
Last Name:	Ugperson02			External Application Nbr:	10102002A										
First Name:	First02			Date Loaded:	11/03/2016										
Middle Name:	Second02			Test ID:	VTAC										
Victorian Suspense Details															
Year of application:	2016			Category:	V02										
UMAT/ISAT Type	<input type="checkbox"/>			UMAT/ISAT Identification:	<input type="text"/>										
Exempt Indicator:	P														
Stat Type:	<input type="checkbox"/>			Stat Percentile:	<input type="text"/>										
Supplemental Indicator:	<input type="checkbox"/>			SEAS Application:	Y										
Hearing Problem:	A			Scholarship Application:	A										
Learning Problem:	B			ATAR Type:	A										
Medical Problem:	C			ATAR:	60.80										
Mobility Problem:	D			Achieved Aggregate Score:	115.00										
Vision Problem:	E			ATAR Calculating Authority:	VTAC										
Other Problem:	F			Fee eligibility for Type 4:	2										
Disability Advice Required:	G														
ASGS Rating:	2			SEIFA % for Postcode:	72										
Statistical Area 1:	8604278			SEIFA % for SA1:	85										

The system displays this page for only VTAC. Use this page to view profile and personal information loaded from the VTAC offer file.

Reviewing Common Assessment Tasks

Access the Common Assessment Tasks page (**Student Admissions > TAC Processing > TAC Suspense > Common Assessment Tasks**).

This example illustrates the fields and controls on the Common Assessment Tasks page.

VIC Data		Common Assessment Tasks		VIC Results	VCAL Studies	VCAL Units
Last Name:	Carlton	External Application Nbr:	27004793D			
First Name:	Craig	Date Loaded:	11/05/2007			
Middle Name:	Andrew	Test ID:	VTAC			
Common Assessment Find View All First 1 of 15 Last						
External Org ID:	01060	Ballarat High School				
TAC Course Code:	YEAR 12 RESULTS-1999					
Subject Code:	BM	CAT Number:	1			
Common Assessment Task						
Task ID:	1	Grade:	C+			
Estimated CAT Grade:		Remark:				
Consideration of Disadvantages						
Permanent Disadvantage:	<input type="checkbox"/>	Environment:	<input type="checkbox"/>			
Sickness:	<input type="checkbox"/>	Absent:	<input type="checkbox"/>			

The system displays this page for only VTAC. Use this page to view Graded Assessment (CAT) results data loaded from the VTAC offer file.

Reviewing VIC Results

Access the VIC Results page (**Student Admissions > TAC Processing > TAC Suspense > VIC Results**).

This example illustrates the fields and controls on the VIC Results page.

Offers		Preferences		VIC Data		VIC Results		VCAL Studies	VCAL Units
Last Name:	Farnsworth	External Application Nbr:	88217311F						
First Name:	Jake	Date Loaded:	27/09/2011						
Middle Name:	William	Test ID:	VTAC						
VIC Results Find View All First 1 of 4 Last									
Result Year:	2008	Type of Schooling Indicator:	N						
VCAA Indicator:	S	VTAC Indicator:	T						
ENTER Type:	A	ENTER:	84.75						
Accrediting Authority Code:	VIC								

The system displays this page for only VTAC. Use this page to view results summary information loaded from the VTAC offer file.

Reviewing VCAL Data

Access the VCAL Studies page (**Student Admissions > TAC Processing > TAC Suspense > VCAL Studies**).

This example illustrates the fields and controls on the VCAL Studies page.

VIC DataCommon Assessment TasksVIC ResultsVCAL StudiesVCAL Units

Last Name:Rogers

External Application Nbr:27009448A

First Name:Kristine

Date Loaded:11/05/2007

Middle Name:Eloise

Test ID:VTAC

VCAL StudiesFind | View AllFirst1 of 3Last

VCAL Cert Year:2003

VCAL Cert Result Status:8

VCAL Cert Code:CERTIFICATE I

The system displays this page only for VTAC. Use this page to view information related to Victorian Certificate of Applied Learning (VCAL) data.

Reviewing VCAL Units

Access the VCAL Units page (**Student Admissions > TAC Processing > TAC Suspense > VCAL Units**).

This example illustrates the fields and controls on the VCAL Units page.

VIC DataCommon Assessment TasksVIC ResultsVCAL StudiesVCAL Units

Last Name:Rogers

External Application Nbr:27009448A

First Name:Kristine

Date Loaded:11/05/2007

Middle Name:Eloise

Test ID:VTAC

VCAL UnitsFind | View AllFirst1 of 15Last

VCAL Unit Year:2005

VCAL Unit Result Status:8

VCAL Unit Code:UNIT1

The system displays this page only for VTAC. Use this page to view information related to VCAL unit data.

Reviewing Assessment Data

Access the Assessment Data page (**Student Admissions > TAC Processing > TAC Suspense > Assessment Data**).

This example illustrates the fields and controls on the Assessment Data page.

Common Assessment Tasks		VIC Results		VCAL Studies		VCAL Units		Assessment Data	
Last Name:	Rogers	External Application Nbr:	27009448A						
First Name:	Kristine	Date Loaded:	11/05/2007						
Middle Name:	Eloise	Test ID:	VTAC						
Assessment Data									
UTESL - Reading:	<input type="text" value="1"/>	VTAC Assess 1:	<input type="text" value="999"/>						
UTESL - Listening:	<input type="text" value="2"/>	VTAC Assess 2:	<input type="text" value="888"/>						
UTESL - Writing:	<input type="text" value="3"/>	VTAC Assess 3:	<input type="text" value="777"/>						
UTESL - Global:	<input type="text" value="4"/>	VTAC Assess 4:	<input type="text" value="666"/>						
Australian Equivalent:	<input type="text" value="1"/>								

The system displays this page only for VTAC. Use this page to view information related to assessment data for graduate entry teaching.

Reviewing Offers

Access the Offers page (**Student Admissions > TAC Processing > TAC Suspense > Offers**).

This example illustrates the fields and controls on the Offers page.

Process Options	Personal Information	Residency	Qualifications	Subjects	Offers	Fact
Last Name Vivaldi		External Application Nbr 730444567				
First Name Anna		Date Loaded 11/29/2018				
Middle Name Maree		Test ID QTAC				
Offer Details						
Admit Type OTH		School Code				
Application Date 09/19/2012		Offer Date 09/15/2012				
TER Score 199.000		OP Score				
Round Number 100		Program Code 707001				
Academic Program BSCI		TAC Stream Code				
Preference Nbr 1		Overall Status				
Schedule FORCED OFFER		Offer Month NOV				
Rank Set 199:		Offer Year 2013				
Base Schedule S1212						
Base Rank Set 98:98:86:						
Basis of Admission AUTO		Admission Type				
Field Posn A		Field Posn B				
Field Posn C		Field Posn D				
Field Posn E		Applicant Type				
Offering Label label 1						
Offered CRS Label FORCED OFFER						
QCE Eligibility Y						
Centrelink Status Y						
Weighted EAS Score 123						
Forced Offer Reason						
Institutional exception						
141 characters remaining						

The information on the Offers page will vary depending on the TAC. Use this page to view the applicant's program of offer.

Reviewing FACT Data

Access the Fact page (**Student Admissions > TAC Processing > TAC Suspense > Fact**).

This example illustrates the fields and controls on the Fact page.

Qualifications				Subjects		Preferences		Offers		PCRS		Fact											
Last Name:		Lawson				External Application Nbr:		123000022															
First Name:		John				Date Loaded:		02/13/2007															
Middle Name:		Volvo				Test ID:		SATAC															
Fact Values												Customize		Find		View All		First		1-5 of 11		Last	
	Code	Description	DEST Question	Value																			
1	ASDIV	Aust Stats Div - New South Wales	N	NSW																			
2	D1		1	10000																			
3	D2		2	22006																			
4	D3		3	10000																			
5	D4		4	10000																			

Use this page to view the data loaded from the FACT file.

The Fact codes mapped to DEST Reference Numbers are posted to DEST Education Participation Details section of the Student Data AUS page. Select **Campus Community > Personal Information (Student) > Biographical (Student) > Personal Attributes > Student Data AUS** to navigate to the Student Data AUS page.

Reviewing PCRS Data

Access the PCRS page (**Student Admissions > TAC Processing > TAC Suspense > PCRS**).

This example illustrates the fields and controls on the PCRS page.

Qualifications				Subjects		Preferences		Offers		PCRS		Fact									
Last Name:		Lawson				External Application Nbr:		123000022													
First Name:		John				Date Loaded:		02/13/2007													
Middle Name:		Volvo				Test ID:		SATAC													
Preference Data												Find		View All		First		1 of 1		Last	
Academic Program:		BART				Preference Nbr:		1													
Preference Course Rank Set												Find		View All		First		1 of 2		Last	
Label:		CRSSA3TH_CALC				BOA Code:		31													
Value:		299:																			
Reason:		TDR.																			

The system displays this page only for SATAC. Use this page to confirm that the data has been loaded from the Preference Course Rank Set file.

Performing Search/Match and Posting TAC Data

This section provides an overview of how to search/match and post external data, and discusses how to:

- Enter TAC run parameters.
- Enter TAC search/match parameters.

Understanding Performing Search/Match and Posting TAC Data

Once you have loaded the TAC data to the suspense file, you specify on the Search Params page which TAC data to load into your database as new records, which TAC data to append to existing records in your database, and which TAC data to ignore or suspend. After choosing your search/match parameters, you can also set up the parameters for posting the TAC data, and you can run both processes at once: to update the suspense file accordingly and to post the TAC external data. Alternatively, you can first run the search/match process to update the suspense file and then later run the posting process to post the TAC external data to your database.

Admissions Information that the TAC Bulk Offer Data Load Populates

Examples of the admissions information populated by the TAC Post Process include:

- Personal data.
- Name and address data.
- Personal phone.
- Application Program Data page information.
- If there are multiple preferences, then additional program application data.
- Test results.
- External education data and school loading data including external degrees, courses, and subjects.
- Residency data.
- Government reporting information including education and training data, and Commonwealth Higher Education Student Support Number (CHESSN) and Student Learning Entitlement (SLE) information.

Pages Used to Perform Search/Match and Post TAC Data Loads

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TAC Run Search/Match Post	SAD_TAC_POST_RUN	Student Admissions > TAC Processing > Search/Match/Post TAC > TAC Run Search/Match Post	Post external TAC data from suspense files. Before you post the data, however, set up the search/match parameters on the Search Parms page. You can post a single record or all of the records in the suspense file.
Search Parms	SEARCH_PARMS	Student Admissions > TAC Processing > Search/Match/Post TAC > Search Parms	Define search and match parameters, which specify the data that the system will append to existing records in your database and the TAC data that the system will ignore. See "Setting Up Search/Match" (Campus Community Fundamentals)

Entering TAC Run Parameters

Access the TAC Run Search/Match Post page (**Student Admissions > TAC Processing > Search/Match/Post TAC > TAC Run Search/Match Post**).

This example illustrates the fields and controls on the TAC Run Search/Match Post page. You can find definitions for the fields and controls later on this page.

TAC Run Search/Match Post

Search Params

Run Control ID:

UAC

[Report Manager](#)

[Process Monitor](#)

Run

TAC Code:

UAC

New South Wales

Execution Option

☒ Search, Match and Post

☐ Post Only

☐ Search and Match Only

Post Processing Parameters

Academic Institution:

PSAUS

PeopleSoft Australia Uni

Date Loaded:

12/12/2007

31

☐ Process Single Record

Address Type:

Mailing

Phone Type:

Home

Email Type:

Other

Academic Level:

1st Year

Application Method:

EDI

Application Defaults

Find | View All

First

1 of 1

Last

Academic Career:

PGRD

Postgraduate

Admit Term:

0581

Semester 1 - Autumn 2007

Application Center:

PGRD

Postgraduate Admissions Office

Recruiting Center:

PGRD

Enter the TAC test ID that you want to process. Once the TAC test ID is entered, the additional fields specific to the TAC will appear. You must have test ID security established to select a value. The prompt will only display test IDs for which you have security. This field is required.

Execution Option

Field or Control	Description
Search, Match and Post	Select this option if you want the process to search your database for records that match the suspense record and post the suspense data to your database.
Post Only	Select this option if you only want to post the suspense data to your database (if you select this option, you must have already run search/match).

<i>Field or Control</i>	<i>Description</i>
Search and Match Only	Select this option if you only want to run the search and match process on the suspense file. You will need to post the data later.

Post Processing Parameters

<i>Field or Control</i>	<i>Description</i>
Academic Institution	Enter the academic institution to which the applicant data will be posted.
Date Loaded	Enter the date for the data load.
Process Single Record	<p>If you prefer to process and post a single record, in the Post Processing Parameters group box, select the Process Single Record check box and specify the external applicant number.</p> <p>Rather than processing the entire file, you can quickly process a single record. If you prefer to process the entire suspense file, do not select Process Single Record.</p>

Field or Control	Description
Address Type	<p>If the search/match/post process adds a new record to your database, the process loads the address information from the TAC suspense record into the Addresses page. Select the address type that you want the process to assign to the new address. Define address types in the Address Type table.</p> <p>For VTAC data:</p> <ul style="list-style-type: none"> • The search/match/post process assigns the address type that is set on the TAC Run Search/Match Post page to the postal address referenced on the Personal Information suspense page. • The search/match/post process assigns the home address type set on the Campus Community Installation - Names / Addresses page to the residential address. • If the Campus Community home address type field and the Address Type field have the same value (for example, <i>campus</i>), the search/match/post process posts only the postal address to the database and does not post the residential address. <hr/> <p>Note: Do not select an address type if you want to post a SATAC file. The TAC Load process, by default, assigns the MAIL address type to the postal addresses provided by SATAC. Additionally, the TAC Load process, by default, assigns the HOME address type to the current addresses provided by SATAC.</p> <hr/>
Phone Type	Select the phone type that you want the process to assign.
Email Type	Select the email type that you want the process to assign.
Academic Level	Select the default academic level for this upload of applicants.
Application Method	Select the default application method for this upload of applicants.
Academic Career	Enter the academic career to which applicants will be posted.
Admit Term	Enter the admit term for the applicants.
Application Center	Enter the default application center for these applicants.

Field or Control	Description
Recruiting Center	Enter the default recruiting center for this upload of applicants.

Entering TAC Search/Match Parameters

Access the Search Params page (**Student Admissions > TAC Processing > Search/Match/Post TAC > Search Params**).

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

TAC Run Search/Match Post
Search Params

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

*Search Parameter: PSCS_TRADITIONAL CS_Person_Traditional

No Match Found

	Add	Update	Suspend	Ignore
New:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Match(es) Found
Find | View All
1-2 of 5

Order Nbr:	10	Name,Addr,City,Bday,Gender,SSN	*****Parameters Refreshed*****	
One Match:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Order Nbr:	20	SSN Only		
One Match:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Multiple Matches:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Use the **Search Parameter** field to select the group of predefined search parameters you want to use for the process.

Note: The words *Parameters Refreshed* appear if this is the first time that you have entered this page with this run control ID, or if any of the parameters on this page changed since the last time you accessed this page with this run control ID.

No Match Found

Field or Control	Description
New	<p>Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database:</p> <p><i>Add:</i> Add the unmatched record to your database, including personal data.</p> <p><i>Suspend:</i> Keep the unmatched record in the suspense file to be looked at manually.</p> <p><i>Ignore:</i> Ignore the unmatched record completely. The process marks the record to be purged.</p>

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Field or Control	Description
Order Nbr (order number)	For each order number, select what you want to do with the record if the search/match/post process discovers one or more matching records.
One Match and Multiple Matches	<p>Select whether you want to add, update, suspend, or ignore matching records:</p> <p><i>Add:</i> Add a new record to your database using the suspense record.</p> <p><i>Update:</i> Update the existing record with the data in the suspense record.</p> <p><i>Suspend:</i> Keep the suspense record back in the suspense table.</p> <p>You need to determine manually whether or not this record matches a record in your database.</p> <p><i>Ignore:</i> Ignore the suspense record that matched a record in your database.</p> <p>The process marks the record to be purged.</p>

Purging TAC Suspense Files and Messages

This section provides an overview of the purge process and discusses how to purge suspense data.

Understanding the Purge Process

Specify which TAC suspense file records to purge, and do the actual purging on the TAC Purge Parameters page. You can also purge TAC messages in this process. If you want to perform an analysis on your processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them later, when you no longer need to view them.

Page Used to Purge TAC Suspense Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TAC Purge	SAD_TAC_PURGE	Student Admissions > TAC Processing > TAC Purge	Purge suspense records and messages for a specific TAC test ID.

Purging Suspense Data

Access the TAC Purge page (**Student Admissions > TAC Processing > TAC Purge**).

<i>Field or Control</i>	<i>Description</i>
TAC Code	Enter the TAC test ID that you want to delete from the suspense record. The TAC test ID list that appears in the prompt is based on the test ID security.
Date Loaded	Enter the date when the files, which you want to purge, were loaded.
All Suspense Rows	Select this option if you want to purge all of the records in your suspense table, regardless of the status of the Post field on the Process Options page.
Marked Suspense Rows	Select this option if you only want to purge those records in your suspense file marked <i>Purge</i> in the Post field on the Process Options page. Select this option if you want to remove all suspense records that have been posted or set to purge and retain the suspense records outstanding for review or processing. The purge process will only delete suspense records with <i>Purge</i> in the <i>Post</i> field on the Process Options page.
Retain Associated Messages	Select this option if you want to retain messages that are associated with the suspense records that you are purging.

<i>Field or Control</i>	<i>Description</i>
Remove Associated Messages	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

Reviewing TAC Candidate Data

This section provides an overview of TAC student profile data and lists the pages used to review profile data.

Understanding TAC Candidate Data

After running the TAC Run Search/Match Post process, TAC student profile information, if posted to an ID, appears in the TAC Candidate Data component. Note that the TAC Load process loads the TAC file data to the suspense file for all TAC records. Suspense file data, however, is eventually purged, so the TAC Candidate Data pages have been provided so that you can later view the TAC data for those records that posted.

The data on these pages is informational only. The **Date Loaded** field is also a key on the candidate data. Your institution therefore has a complete audit trail on what has been posted for a student, you can display the initial creation plus later updates from any additional offer rounds.

Not all data contained in the suspense tables is posted to the Recruiting and Admissions application. The system populates only minimal personal data; applicant data, external education data, and residency data in order to create an applicant. The student profile provides a means of inquiring on all data loaded to the suspense files for a posted student. This means your institution can refer back for a student's total TAC data but not all of it is used to create the student's admissions record.

The pages and data that appear on the TAC Candidate Data component are similar to the pages and data that appear on the TAC Suspense component. However, you cannot modify any information on the TAC Candidate Data component because the data has already been posted. The number of pages on the TAC Candidate Data component will vary depending on the TAC test ID.

Pages Used to View TAC Student Profile Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personal Information	SAD_TAC_CD_BIO	Student Admissions > TAC Processing > TAC Candidate Data > Personal Information	Demographic data appears on this page from the TAC Suspense–Personal Information page. This page also indicates if a personal record was created for this person in your database.

Page Name	Definition Name	Navigation	Usage
Address	SAD_TAC_CD_ADD_CUR	Student Admissions > TAC Processing > TAC Candidate Data > Address	Review address details about a student.
Qualifications	SAD_TAC_CD_QULSAS	Student Admissions > TAC Processing > TAC Candidate Data > Qualifications	Review qualifications details for a student.
Subjects	SAD_TAC_CD_SBJSA	Student Admissions > TAC Processing > TAC Candidate Data > Subjects	Review subjects taken by a student.
Offer	SAD_TAC_CD_OFFER	Student Admissions > TAC Processing > TAC Candidate Data > Offer	Review details about the offer for a student.
Fact	SAD_TAC_CD_FACT	Student Admissions > TAC Processing > TAC Candidate Data > FACT	Review FACT data (including DIISRTE questions) about a student.
Residency	SAD_TAC_CD_BIO_RES	Student Admissions > TAC Processing > TAC Candidate Data > Residency	Review residency and additional DIISRTE reporting information about a student.
Preferences	SAD_TAC_CD_PRFSAS	Student Admissions > TAC Processing > TAC Candidate Data > Preferences	Review preference details for a student.
VIC Data	SAD_TAC_CD_VIC_OTR	Student Admissions > TAC Processing > TAC Candidate Data > VIC Data	Review biographical and demographic information for a student from the Victorian TAC.
Common Assessment Tasks	SAD_TAC_CD_CAT	Student Admissions > TAC Processing > TAC Candidate Data > Common Assessment Tasks	Review common assessment task details for a student.
VIC Results	SAD_TAC_CD_VIC_RSL	Student Admissions > TAC Processing > TAC Candidate Data > VIC Results	Review results details for a student from the Victorian TAC.

Page Name	Definition Name	Navigation	Usage
VCAL Studies	SAD_TAC_CD_VCL	Student Admissions > TAC Processing > TAC Candidate Data > VCAL Studies	Review information about VCAL Studies.
VCAL Units	SAD_TAC_CD_VCU	Student Admissions > TAC Processing > TAC Candidate Data > VCAL Units	Review information about VCAL units.
Assessment Data	SAD_TAC_CD_VIC_AS	Student Admissions > TAC Processing > TAC Candidate Data > Assessment Data	Review information about assessment data for graduate entry teaching.
PCRS (preference course rank set)	SAD_TAC_CD_PCRSA	Student Admissions > TAC Processing > TAC Candidate Data > PCRS	Review a student's preference course rank set information.

(CAN) Receiving External Applications from OUAC

Understanding External Applications from OUAC

Universities in Ontario, Canada use the Ontario Universities Application Center (OUAC) throughout their undergraduate admissions process. The OUAC collects much of the undergraduate admissions data from various sources and electronically transmits the data to institutions in Ontario.

PeopleSoft developed the OUAC interface using EDI Manager. This tool enables you to load data that you receive electronically from OUAC into your PeopleSoft application. The system posts personal data, application data, academic history, and testing information to core tables in your database.

To process OUAC transactions, you run a pre-load process that prepares the OUAC file for EDI. Then you load the data from the OUAC file into staging tables in your application. While the data is in the staging tables you can view and edit the data. When you are ready, you post the data to tables in your application.

The OUAC defines the fields on these pages. Please refer to the *OUAC Systems Manual* for explanations of the individual fields on each page.

Pre-Loading OUAC Data

This section discusses how to pre-load OUAC data.

Page Used to Pre-Load OUAC Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Pre Load Parms (OUAC pre load parameters)	OUAC_PRELOAD_PARMS	Student Admissions > OUAC > Processes > Pre Load Data Process	Prepare the OUAC file for EDI. The OUAC pre load process adds control records to transaction groups and sends them to the output file.

Pre-Loading OUAC Data

Access the OUAC Pre Load Parms (OUAC pre load parameters) page (**Student Admissions > OUAC > Processes > Pre Load Data Process**).

This example illustrates the fields and controls on the OUAC Pre Load Parm's page. You can find definitions for the fields and controls later on this page.

OUAC Pre Load Parm's

Run Control ID: 1

[Report Manager](#)
[Process Monitor](#)
Run

Path/Name- Input/Output Files	
Input File:	n:\user\canada\newtest\ug085.udi
Output Des:	n:\user\canada\newtest\outug085.udi

Field or Control	Description
Input File	Enter the full path and name of the OUAC file that you want to process.
Output Des (output description)	Enter the full path and name of the output file.

Click the **Run** button to run the OUAC pre load process at user-defined intervals.

Loading the OUAC Data Through the EDI Manager

Use the Schedule Inbound EC Agent - Run Control Parameters page to load the OUAC data through EDI Manager. The Inbound EC Agent process (ECIN0001) translates the values in the flat file created by the OUAC pre-load process and loads them into staging tables. Set the run option parameter to single file and the force profile parameter to do not force.

See Also

Product documentation for *PeopleTools: Supported Integration Technologies*

Loading Additional Data Through an SQR Process

This section discusses how to load additional data through an SQR process.

Page Used to Load Additional Data Through an SQR Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Load	PRCSRUNCNTL_AD_OL	Student Admissions > OUAC > Processes > Load OUAC Data	Translate OUAC data that EDI Manager is not equipped to handle (such as dates that are in YYYYMM format, name fields that need to be converted to the PeopleSoft format, and other character fields that need to be converted to mixed case).

Reviewing and Editing the OUAC Transaction A/U Staging Tables

This section lists the pages in the OUAC Transactions A/U component used to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction A/U Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC A1/U1	OUAC_A1_U1_PNL	Student Admissions > OUAC > Transactions > Transactions A/U	Review and edit OUAC transaction data.
OUAC A2/U2	OUAC_A2_U2_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A2/U2	Review and edit OUAC transaction data.
OUAC A3/U3	OUAC_A3_U3_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A3/U3	Review and edit OUAC transaction data.
OUAC A4/U4	OUAC_A4_U4_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A4/U4	Review and edit OUAC transaction data.
OUAC A5/U5	OUAC_A5_U5_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A5/U5	Review and edit OUAC transaction data.

Page Name	Definition Name	Navigation	Usage
OUAC A6/U6	OUAC_A6_U6_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A6/U6	Review and edit OUAC transaction data.
OUAC A7/U7	OUAC_A7_U7_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A7/U7	Review and edit OUAC transaction data.
OUAC A8/U8	OUAC_A8_U8_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A8/U8	Review and edit OUAC transaction data.
OUAC A9/U9	OUAC_A9_U9_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC A9/U9	Review and edit OUAC transaction data.
OUAC AR	OUAC_AR_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC AR	Review and edit OUAC transaction data.

Reviewing and Editing the OUAC Transaction B5 Staging Tables

This section lists the page in the OUAC Transactions B5 component used to review and edit the OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction B5 Staging Tables

Page Name	Definition Name	Navigation	Usage
OUAC B5	OUAC_B5_PNL	Student Admissions > OUAC > Transactions > Transactions A/U > OUAC B5	Review and edit OUAC transaction data.

Reviewing and Editing the OUAC Transaction B/V-E Staging Tables

This section lists the pages used in the UAC Transactions B/V-E component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction B/V-E Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC B1/V1	OUAC_B1_V1_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E	Review and edit OUAC transaction data.
OUAC B2	OUAC_B2_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC B2	Review and edit OUAC transaction data.
OUAC B7/V7	OUAC_B7_V7_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC B7/V7	Review and edit OUAC transaction data.
OUAC B8/V8	OUAC_B8_V8_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC B8/V8	Review and edit OUAC transaction data.
OUAC B9/V9	OUAC_B9_V9_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC B9/V9	Review and edit OUAC transaction data.
OUAC C1	OUAC_C1_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC C1	Review and edit OUAC transaction data.
OUAC C2	OUAC_C2_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC C2	Review and edit OUAC transaction data.
OUAC D1	OUAC_D1_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC D1	Review and edit OUAC transaction data.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC E1	OUAC_E1_PNL	Student Admissions > OUAC > Transactions > Transactions B/V - E > OUAC E1	Review and edit OUAC transaction data.

Reviewing and Editing the OUAC Transaction F Staging Tables

This section lists pages used in the OUAC Transactions F component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction F Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC F1	OUAC_F1_PNL	Student Admissions > OUAC > Transactions > Transactions F	Review and edit OUAC transaction data.
OUAC F2	OUAC_F2_PNL	Student Admissions > OUAC > Transactions > Transactions F > OUAC F2	Review and edit OUAC transaction data.
OUAC F3	OUAC_F3_PNL	Student Admissions > OUAC > Transactions > Transactions F > OUAC F3	Review and edit OUAC transaction data.

Reviewing and Editing the OUAC Transaction G/H Staging Tables

This section pages used in the OUAC Transactions G/H component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction G/H Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC G1/H1	OUAC_G1_H1_PNL	Student Admissions > OUAC > Transactions > Transactions G/H	Review and edit OUAC transaction data.

Page Name	Definition Name	Navigation	Usage
OUAC G2/H2	OUAC_G2_H2_PNL	Student Admissions > OUAC > Transactions > Transactions G/H > OUAC G2/H2	Review and edit OUAC transaction data.
OUAC G3/H3	OUAC_G3_H3_PNL	Student Admissions > OUAC > Transactions > Transactions G/H > OUAC G3/H3	Review and edit OUAC transaction data.
OUAC G4/H4	OUAC_G4_H4_PNL	Student Admissions > OUAC > Transactions > Transactions G/H > OUAC G4/H4	Review and edit OUAC transaction data.
OUAC G5/H5	OUAC_G5_H5_PNL	Student Admissions > OUAC > Transactions > Transactions G/H > OUAC G5/H5	Review and edit OUAC transaction data.
OUAC G6/H6	OUAC_G6_H6_PNL	Student Admissions > OUAC > Transactions > Transactions G/H > OUAC G6/H6	Review and edit OUAC transaction data.
OUAC G7/H7	OUAC_G7_H7_PNL	Student Admissions > OUAC > Transactions > Transactions G/H > OUAC G7/H7	Review and edit OUAC transaction data.
OUAC G8/H8	OUAC_G8_H8_PNL	Student Admissions > OUAC > Transactions > Transactions G/H > OUAC G8/H8	Review and edit OUAC transaction data.

Reviewing and Editing the OUAC Transaction J-N Staging Tables

This section lists the pages used in the OUAC Transactions J-N component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction J-N Staging Tables

Page Name	Definition Name	Navigation	Usage
OUAC J/K	OUAC_J_K_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC J/K	Review and edit OUAC transaction data.
OUAC J1/K1	OUAC_J1_K1_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC J1/K1	Review and edit OUAC transaction data.
OUAC J2/K2	OUAC_J2_K2_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC J2/K2	Review and edit OUAC transaction data.
OUAC J3/K3	OUAC_J3_K3_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC J3/K3	Review and edit OUAC transaction data.
OUAC J4/K4	OUAC_J4_K4_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC J4/K4	Review and edit OUAC transaction data.
OUAC J5/K5	OUAC_J5_K5_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC J5/K5	Review and edit OUAC transaction data.
OUAC L1/N1	OUAC_L1_N1_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC L1/N1	Review and edit OUAC transaction data.
OUAC M1	OUAC_M1_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC M1	Review and edit OUAC transaction data.
OUAC M2	OUAC_M2_PNL	Student Admissions > OUAC > Transactions > Transaction J - N > OUAC M2	Review and edit OUAC transaction data.

Reviewing and Editing the OUAC Transaction P-R Staging Tables

This section lists pages used in the OUAC Transactions P-R component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction P-R Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC PI	OUAC_PI_PNL	Student Admissions > OUAC > Transactions > Transaction P- R	Review and edit OUAC transaction data.
OUAC R/S	OUAC_R_S_PNL	Student Admissions > OUAC > Transactions > Transaction P- R > OUAC R/S	Review and edit OUAC transaction data.
OUAC R1/S1	OUAC_R1_S1_PNL	Student Admissions > OUAC > Transactions > Transaction P- R > OUAC R1/S1	Review and edit OUAC transaction data.
OUAC R2/S2	OUAC_R2_S2_PNL	Student Admissions > OUAC > Transactions > Transaction P- R > OUAC R2/S2	Review and edit OUAC transaction data.
OUAC R3/S3	OUAC_R3_S3_PNL	Student Admissions > OUAC > Transactions > Transaction P- R > OUAC R3/S3	Review and edit OUAC transaction data.
OUAC R4/S4	OUAC_R4_S4_PNL	Student Admissions > OUAC > Transactions > Transaction P- R > OUAC R4/S4	Review and edit OUAC transaction data.

Reviewing and Editing the OUAC Transaction T Staging Table

This section lists the OUAC T1 page used to review and edit OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction T Staging Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC T1	OUAC_T1_PNL	Student Admissions > OUAC > Transactions > Transactions T1	Review and edit OUAC transaction data.

Viewing Search/Match and OUAC Processing Statuses

You can use the OUAC Suspense page to view the status of an OUAC application record and to view messages that are generated by the posting process. This section discusses how to use the OUAC Suspense page.

Page Used to View Search/Match and OUAC Processing Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Suspense	OUAC_SUSP_PNL	Student Admissions > OUAC > Processes > Suspense Data	View the status of an OUAC application record, and to view messages when generated by the posting process. For example, you can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors were encountered during the search/match or loading processes.

Using the OUAC Suspense Page

Access the OUAC Suspense page (**Student Admissions > OUAC > Processes > Suspense Data**).

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

OUAC Suspense

Trans ID: OUAC_UAS_ADD **OUAC Identifier:** A4 **OUAC Process Status:** Suspense
OUAC Ref#: 20000041720 **OUAC Appl. Nbr.:** 02 **OUAC Dist. Nbr.:** 14

Suspense Data

Search/Match Processing Option: Complete **OUAC Process Status:** Suspense
ID: 0022 **Search Order Nbr:** **Matches:**
Social Insurance #: **Birthdate:** 05/03/1981 **Gender:** Male
Name:
Address Line 1:
Address Line 3:
Message Set Number: 14210 **Message Number:** 4
Message Text: The OUAC Institution code does not exist in the external org table.

Field or Control	Description
Search/Match Processing Option	<p>Displays the status of the record after the Search/Match process.</p> <p><i>Complete:</i> The process was completed without errors.</p> <p><i>Error:</i> The process encountered errors.</p> <p><i>Perform:</i> The process has not run yet.</p>
OUAC Process Status	<p>Select the status that you want for this record. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. The delivered values are <i>EDI Loaded</i>, <i>Loaded</i>, <i>Posted</i>, <i>Reviewed</i>, and <i>Suspense</i>.</p> <p>For example, if you change the status to <i>Loaded</i>, the next time that you run the post process, this record would post to the database—because the post process posts any file with a status of <i>Loaded</i>. If you do not want the record to remain in suspense status and do not want to post it to the database at a later date, select <i>Reviewed</i>.</p>
ID	<p>Enter an ID to merge this record with an existing ID type. If the system suspended the record after it performed the search and discovered a match for one ID, that ID displays here.</p> <p>If the system finds more than one match, the search order number appears and the number of matches appear in the Matches display-only field.</p>

Posting OUAC Transaction Data

This process picks up all the transactions in Loaded status and posts the data to the PS Core tables. It creates separate applications for each OUAC reference number/application number that is not a 101 applicant. For 101 applicants it creates separate program numbers.

To post OUAC transaction data:

- Set search parameters for posting OUAC data.
- Set OUAC post parameters.
- Set defaults for posting OUAC data.
- Set more post parameters.

Pages Used to Post OUAC Transaction Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Post Parms (OUAC post parameters)	OUAC_POST_PARDS	Student Admissions > OUAC > Processes > Post OUAC Data > OUAC Post Parms	Define default values for admit type, application center, academic career, and campus.
OUAC Post Parms2 (OUAC post parameters2)	OUAC_POST_PARDS2	Student Admissions > OUAC > Processes > Post OUAC Data > OUAC Post Parms2	Define application and transcript posting defaults.
OUAC Post Parms BC (OUAC post parameters BC)	OUAC_POST_PARDS_BC	Student Admissions > OUAC > Processes > Post OUAC Data > OUAC Post Parms BC	Assign transcript status values.

Setting Search Parameters for Posting OUAC Data

Use the Search Parms (search parameters) page to set up your search/match parameters for processing the OUAC staging tables.

Related Links

[Setting Up Search/Match Parameters](#)

Setting OUAC Post Parameters

Access the OUAC Post Parms (OUAC post parameters) page (**Student Admissions > OUAC > Processes > Post OUAC Data > OUAC Post Parms**).

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

[Search Params](#)
[OUAC Post Params](#)
[OUAC Post Params2](#)
[OUAC Post Params BC](#)

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

	Admit Type:	Application Center:	Academic Career:	Campus:
UAS:	<input type="text" value="FYR"/>	<input type="text" value="GRAD"/>	<input type="text" value="BUSN"/>	<input type="text" value="MAIN"/>
PTIM:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TEAS:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
OLSAS:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Field or Control	Description
Admit Type	Select the default admit type for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The admit type that you enter here is the default on the Application Data page (the ADM_APPL_DATA record). Define admit types on the Admit Types Table page.
Application Center	Select the default application center for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The application center that you enter here is the default on the Application Data page (the ADM_APPL_DATA record). Define application centers on the Application Center Table page.
Academic Career	Select the default academic career for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The academic career that you enter here is the default in the ADM_APP_CAR_SEQ record. Define academic careers on the Academic Career Table page.
Campus	Select the default campus for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The campus that you enter here is the default on the Application Program page (the ADM_APPL_PROG record). If you do not select a campus here, the default is the default campus attached to the applicant's academic program. Define campuses on the Campus Table page.

Setting Defaults for Posting OUAC Data

Access the OUAC Post Params2 (OUAC post parameters2) page (**Student Admissions > OUAC > Processes > Post OUAC Data > OUAC Post Params2**).

Field or Control	Description
Notification Plan	Select the notification plan that you want entered for these applications during the posting process. A notification plan specifies whether this person should be on a regular or special notification track. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Early Admt</i> (early admit), <i>Regular</i> , and <i>Rolling</i> .
Application Method	Select the application method that you want entered for these applications during the posting process. Application methods indicate how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Appl Serv</i> (application server), <i>Diskette</i> , <i>EDI</i> (electronic data interchange), <i>Hard Copy</i> , <i>OUAC</i> (Ontario Universities Application Center), <i>Web Appl</i> (web application).
Fee Type	Select the fee type you want entered for these applications during the posting process. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Internatnl</i> (international) and <i>Standard</i> .
Default Admit Term	Select a default admit term for OUAC transactions that transmit term information without a term date. Term Date is a required field in PeopleSoft applications.
Acad Load (academic load)	Select the academic load that you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Level (academic level)	Select the academic level that you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.
Degree Date	Select a default degree date for OUAC transactions that transmit degree information without a degree date. Degree Date is a required field in PeopleSoft applications.
Grade Input	Enter a default grade for OUAC transactions that transmit courses without a grade. <i>Grade</i> is a required field in PeopleSoft applications.
Transcript Status	Select a transcript status. The data source and data medium that you select is the default for the transcript status that you select here. Insert rows to add subsequent transcript statuses.

Field or Control	Description
Data Source	Select a default data source for the transcript status in this row of data.
Data Medium	Select a default data medium for the transcript status in this row of data.

Setting More Post Parameters

Access the OUAC Post Params BC (OUAC post parameters BC) page (**Student Admissions > OUAC > Processes > Post OUAC Data > OUAC Post Params BC**).

Field or Control	Description
School % Crse Trans Stat (school % course translate status)	Assign a transcript status to the final percentage assigned by the school.
Prov. Exam % Trans Stat (province exam % translate status)	Assign a transcript status to the exam percentage assigned by the province.
Prov. Blended % Trans Stat (province blended % translate status)	Assign a transcript status to the blended percentage.
Prov Interim % Trans Stat (province interim % translate status)	Assign a transcript status to the interim percentage assigned by the school.
BC Honours Category	Enter a default for applicants who have earned honors standing. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are <i>Laude</i> , <i>Magna</i> , <i>None</i> , and <i>Summa</i> .

Note: If you assign the same transcript status to the percentage fields above, the incoming marks data does not create a new row, but, instead, overwrites the old one. Assigning a different transcript status to these fields ensures that marks are populated correctly.

Viewing OUAC Messages

This section discusses how to view OUAC messages.

Page Used to View OUAC Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Process Messages Table	OUAC_PRCS_MSG_TBL	Student Admissions > OUAC > Processes > OUAC Messages	View errors generated during the posting process.

Using the OUAC Messages Page

Access the OUAC Process Message Table page (**Student Admissions** > **OUAC** > **Processes** > **OUAC Messages**).

This example illustrates the fields and controls on the OUAC Process Message Table page. You can find definitions for the fields and controls later on this page.

OUAC Process Message Table

Find | View All First 1 of 1 Last

Instance: 1 Institution: PSUNV ID: 0002 Appl Nbr: 00022502

OUAC Ref#: OUAC Appl. Nbr.: OUAC Identifier: Get Results

Process Instance: Application Nbr:

ID: OUAC Ref#: OUAC Appl. Nbr.: OUAC Identifier:

User ID: Run Date/Time: Message Severity: Message Set: Message Nbr:

Message Text: Description:

Value of Field in Error:

Select the following criteria for which you want to search for OUAC process messages: **Instance**, **Institution**, **ID**, **Appl Nbr** (application number), **OUAC Ref#** (OUAC reference number) **OUAC Appl Nbr** (OUAC application number), and **OUAC Identifier**.

Reviewing Overflow OUAC Application Information

Use the OUAC Application Data component to view overflow OUAC data. The data that appears in this component has no natural home in PeopleSoft core tables — it therefore appears here. Thus, for students posted through OUAC, the OUAC Application Data component is an extension of their application.

This section discusses how to:

- Review general OAUC application data.
- Review OUAC law application information.

- Review OUAC law categories.

Pages Used to Review Overflow OUAC Application Information

Page Name	Definition Name	Navigation	Usage
OUAC Application Data	OUAC_APPL_DATA	Student Admissions > OUAC > OUAC Application	View overflow OUAC application data.
OUAC Law Application Data	OUAC_APPL_DATA_LAW	Student Admissions > OUAC > OUAC Application > OUAC Law Application Data	Review overflow OUAC law application data.
OUAC Appl Law Cat (OUAC application law category)	OUAC_APPL_LAW_CAT	Student Admissions > OUAC > OUAC Application > OUAC Appl Law Cat	View OUAC law categories.

Reviewing General OUAC Application Data

Access the OUAC Application Data page (**Student Admissions > OUAC > OUAC Application**).

This example illustrates the fields and controls on the OUAC Application Data page.

OUAC Application Data		OUAC Law Application Data		OUAC Appl Law Cat	
Chadwick Forde		0022			
Academic Career: Undergraduate		Application Nbr: 00024160			
Application Data					
OUAC Ref#:	20000041720	Postsecondary:	No		
OUAC Release:	Yes	Admit Basis:	110		
Adv Std Program:		Adv Std Year:			
Cntry Eng Schl:	CAN	CEGEP Code:			
Yrs Eng School:	13	Yrs in High Sch:	5		
OUAC Choice Find View All First 1 of 1 Last					
OUAC Appl. Nbr.:	02	OUAC Choice:	2	Prog Nbr:	0 ED
Subject Area:	080				

Reviewing OUAC Law Application Information

Access the OUAC Law Application Data page (**Student Admissions > OUAC > OUAC Application > OUAC Law Application Data**).

This example illustrates the fields and controls on the OUAC Law Application Data page.

OUAC Application Data		OUAC Law Application Data		OUAC Appl Law Cat	
Chadwick Forde		0022			
Academic Career: Undergraduate		Application Nbr: 00024160			
Application Data					
OUAC Ref#:	20000041720	Offer Date:	02/07/2005	Law Fee Waiver Received	<input type="checkbox"/>
Attended Law:	<input type="text" value="Not Report"/>	Emerg Auth.:	<input type="text" value="Not Report"/>	Withdrawn Law:	<input type="text" value="No"/>
Less Than Full Course Load:	<input type="checkbox"/>	More Than Full Course Load:	<input type="checkbox"/>	Spplmnty Units:	<input type="text"/>
Grade In/Official:	<input type="checkbox"/>	LSAT Number Times Written:	<input type="text"/>	Spplmnty Value:	<input type="text"/>
Units Taken:	<input type="text"/>	Exceptions Noted:	<input type="checkbox"/>	Supplmnty GPA:	<input type="text"/>
Grade Points:	<input type="text"/>	GPA:	<input type="text"/>	Percent:	<input type="text"/>
Supplmnty Pct:	<input type="text"/>				
All OLSAS Applications					
Osgoode:	<input type="text" value="Active"/>	Ottawa:	<input type="text" value="Active"/>	Queen's:	<input type="text" value="Withdrawn"/>
Toronto:	<input type="text" value="Active"/>	Western:	<input type="text"/>	Windsor:	<input type="text"/>

Reviewing OAUC Law Categories

Access the OUAC Appl Law Cat page (**Student Admissions > OUAC > OUAC Application > OUAC Appl Law Cat**).

This example illustrates the fields and controls on the OUAC Appl Law Cat page.

OUAC Application Data		OUAC Law Application Data		OUAC Appl Law Cat	
Chadwick Forde		0022			
Academic Career: Undergraduate		Application Nbr: 00024160			
Application Data					
OUAC Ref#:	20000041720				
OUAC Category 1:	<input type="text"/>		Status:	<input type="checkbox"/>	
OUAC Category 2:	<input type="text"/>		Status:	<input type="checkbox"/>	
OUAC Category 3:	<input type="text"/>		Status:	<input type="checkbox"/>	
OUAC Category 4:	<input type="text"/>		Status:	<input type="checkbox"/>	
OUAC Category 5:	<input type="text"/>		Status:	<input type="checkbox"/>	
OUAC Category 6:	<input type="text"/>		Status:	<input type="checkbox"/>	
OUAC Category 7:	<input type="text"/>		Status:	<input type="checkbox"/>	
OUAC Category 8:	<input type="text"/>		Status:	<input type="checkbox"/>	

(GBR) Managing UCAS and UTT Applications

Understanding UCAS and UTT Data Processing

Universities and Colleges Admissions Service (UCAS) is the UK central body that receives and processes admission applications. Applicants apply to UCAS. UCAS then distributes the applications to the institutions. Institutions communicate the admission decision to UCAS rather than directly to the applicant.

UCAS provides an Open Database Connectivity (ODBC) link to which participating institutions can connect to import applications and send back admission decision details to UCAS. UCAS then communicates the decision details to the applicants. PeopleSoft Campus Solutions enables you to connect to the UCAS database to import full-time undergraduate (FTUG) and Teacher Training applications, process the imported applications, and send back the admission decision details to UCAS.

UCAS provides database views through which institutions import data. For example, the ivStarA database view contains the applicant's contact details, including address and phone number. Refer to the ODBC-link Technical Manual for information about the database views, its field descriptions, and the transactions that are exchanged between UCAS and the academic institution. This manual is available to UCAS subscribers from the UCAS website.

See www.ucas.ac.uk

To import and process UCAS and Teacher Training applications:

1. Set up options, including the database link to UCAS.
2. Import reference data, such as ethnic codes, country codes, and application statuses, from UCAS.
3. Review the imported reference data.

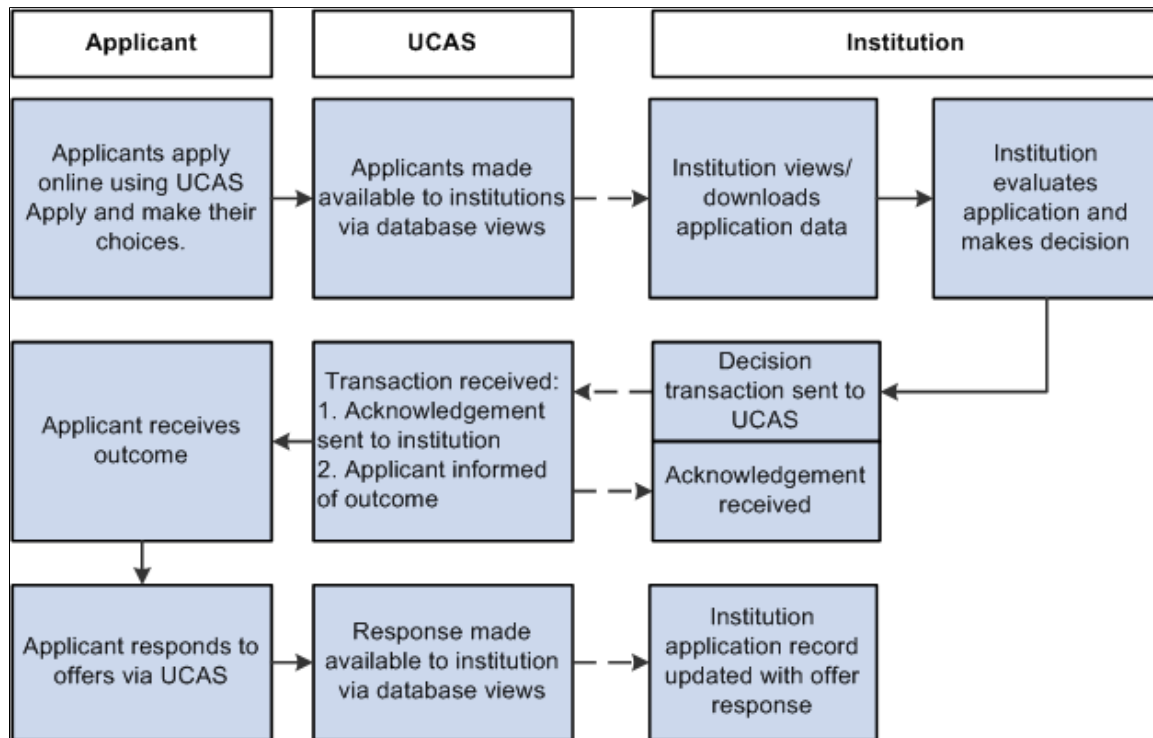
In some cases, you must map the reference data to the Campus Solutions data, for example, UCAS country codes to Campus Solutions country codes.

4. Import applications and applicant data from UCAS.
5. Review and correct errors in the imported applications.
6. Enter admission decisions for the imported applications.
7. Communicate the decisions back to UCAS as transactions.
8. Import any changes to the applicant or applications data maintained by UCAS.

Data changes that you import from UCAS could be offer responses.

Each combination of an institution and a UCAS course is referred to as a *choice*.

This diagram provides an overview of the process of importing and processing UCAS applications.



When the applicant responds to an offer and when his or her exam results are available, the institution confirms or rejects the conditional offer by comparing the applicant's exam results with the conditions. Campus Solutions enables you to import the exam results, match the results with the offer conditions and process Confirmation decisions.

An applicant who does not have an admission offer becomes eligible for Clearing. Also, an applicant can register with UCAS for Adjustment if he or she wants to apply for another course. Campus Solutions supports Confirmation, Clearing, and Adjustment processing for 2009 admissions cycle onwards.

The *UCAS Admissions Guide* and *Decision Processing Manual* provide more information about Confirmation, Clearing, and Extra. This guide and manual are available to subscribers from the UCAS website.

Common Elements Used to Manage UCAS and Teacher Training Applications

<i>Field or Control</i>	<i>Description</i>
Personal Information	Click this link to access the Add/Update a Person component (SCC_BIO_DEMO) where you can view and maintain the person records that the system creates for the imported applicants.

Field or Control	Description
Applicant Summary	Click this link to access the Applicant Summary page where you can view the imported applicant data.
Maintain Applications	Click this link to access the Maintain Applications component (ADM_APPL_MAINTNCE) where you can view and maintain the Campus Solutions admission application records that the system creates for the imported applications.
Choice Details	Click this link to access the Choices page where you view the applicant's imported application choices and a summary of the related Campus Solutions application records.
Decision Entry	Click this link to access the Initial Decision Entry page where you can enter an admission decision for an imported application choice.
Application Notes (<number>)	Click this link to access the Application Notes page where you can view all the key application choice information on a single page and add notes. The number in parentheses indicates the number of notes records for the application choice, for example, Application Notes (2) indicates two notes records for the application choice.
CAS Details (<number>)	Click this link to access the CAS Maintenance component where you can view the related CAS detail record for the application choice. The number in parentheses indicates the number of CAS details records for the application choice, for example, CAS Details (2) indicates two CAS Details records for the application choice.
Comments (<number>)	Click this link to access the Application Notes page where you can view and add comments. The number in parentheses indicates the number of comment records for the application choice, for example, Comments (2) indicates two comment records for the application choice.
Further Information	Click this link to access the Further Information page for a subject where you can view the Other Qualification Title, Equivalence, National Centre Number and Unit Grades.
Round / Choice	This field indicates the round number and choice number of the Teacher Training application choice. The first digit of Round / Choice represents the Round Number and the second digit represents the Choice Number.

Preparing for UCAS and UTT Data Processing

Before you can import and process UCAS, UTT, and Apply data, you must set up your system as follows:

- Enable the UK fields for all institutions.
- Enable the UK fields for a specific institution.
- Set up script text for UCAS Confirmation and Clearing enquiries.
- Set up phone numbers for UCAS Confirmation and Clearing enquiries.
- Set up UCAS, UTT, and Apply options.
- Set up UCAS, UTT, and Apply application import defaults.
- Set up UCAS and UTT decision approval options.
- Set up UCAS and UTT program action reasons.
- Set up UCAS and UTT program action reasons for Confirmation, Clearing, and Adjustment.
- Map application statuses to program actions and reasons for Apply applications.
- Set up outcomes for enquiries and notes.
- Map UCAS attendance types.
- Map UCAS, UTT, and Apply entry years and months.
- Map UCAS entry points.
- Map UCAS housing interest.
- Define external systems.
- Set up UCAS and Apply user defaults.
- Set up national ID types for country code GBR.

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, you should read the additional documentation describing those integrations. Setting up National ID Types as detailed in this UCAS documentation may vary depending on how you configure your systems. The following documentation provides information about the setup, functional, and technical implementation considerations.

See:

"Integrating Person Data" (Campus Solutions Application Fundamentals)

"Integrating Setup Data" (Campus Solutions Application Fundamentals)

"Monitoring Integrations Using the Integrity Utility" (Campus Solutions Application Fundamentals)

See *Campus Solutions to Human Capital Management Integration* in My Oracle Support (ID 1553319.1).

Pages Used to Prepare for UCAS and UTT Data Processing

Page Name	Definition Name	Navigation	Usage
SA Features	SCC_INSTALL_SA2	Set Up SACR > Install > Student Admin Installation > SA Features	Enable the UK-specific fields on the Campus Solutions pages for all institutions.

Page Name	Definition Name	Navigation	Usage
Academic Institution 6	SSR_INST_FEATURES	Set Up SACR > Foundation Tables > Academic Structure > Academic Institution Table > Academic Institution 6	Enable the UK-specific fields on the Campus Solutions pages for a specific institution.
Program Action Reason Table	PROG_RSN_TBL	Set Up SACR > Product Related > Student Records > Program Action > Program Action Reason Table	Set up program action reasons for UCAS and UTT. Also, set up the script text for UCAS program action reasons. Your institution's employees can read aloud this script text to applicants during Confirmation and Clearing enquiries.
Application Center	ADM_APPLCTR_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Applicants > Application Center Table	Set up the application centers for UCAS, UTT, and Apply applications. Enter the phone numbers that UCAS applicants can call to enquire about Confirmation and Clearing in your institution.
UCAS Configuration	SAD_UC_CONFIG	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Configuration	For an institution, configure system and interface setup options.
UCAS Application Import	SAD_UC_CONFIG2	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Application Import	For an institution, set up the default values that the import process uses to create the Campus Solutions application records for the ivStarC application data.
UTT/Apply Import	SAD_UC_GT_CONFIG	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT/Apply Import	For an institution, set up the default values that the import process uses to create the Campus Solutions application records for the ivgStarG and Apply application data.
UCAS Decision Approval	SAD_UC_DECN_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Decision Approval	Indicate whether approval is required for UCAS application, Confirmation, and Release into Clearing decisions.

Page Name	Definition Name	Navigation	Usage
UTT Decision Approval	SAD_UC_GDEC_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT Decision Approval	Indicate whether approval is required for UTT application decisions.
UCAS Program Actions	SAD_UC_UPRG_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Program Actions	Define the program actions and reason values that the system uses when an update to a UCAS application choice requires an update to the program action and action reason values of the corresponding Campus Solutions application record.
UTT Program Actions	SAD_UC_GPRG_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT Program Actions	Define the program actions and reason values that the system uses when an update to a UTT application choice requires an update to the program action and action reason values of the corresponding Campus Solutions application record.
UCAS Confirmation	SAD_UC_CONF_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Confirmation	Define the program actions and reason values that the system uses for UCAS Confirmation, Clearing, and Adjustment.
UTT Confirmation	SAD_UC_GCNF_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT Confirmation	Define the program actions and reason values that the system uses for UTT Confirmation processing and for Clearing Elsewhere.
Apply Program Actions	SAD_UC_AP_SETUP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > Apply Program Actions	Map application statuses to program actions and reasons for Apply applications.
Outcome Codes	SAD_UC_OUTCMCDS	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Outcome Code	Define the outcome codes that you can use to classify applicant enquiries and application notes.

Page Name	Definition Name	Navigation	Usage
Attendance Type	SAD_UC_ATTTYPEM	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Attendance Type	Map UCAS attendance types to Campus Solutions academic levels. The system uses this mapping when you import ivEducation and ivgEducation data to create Campus Solutions external education records.
Entry Year	SAD_UC_ENTRYYRM	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Entry Year	Map entry year and month to a Campus Solutions admit term. You can map multiple combinations of entry year and month to a Campus Solutions admit term. You define admit terms on the Term Table page. For information about defining term tables, see "Defining Terms, Sessions, and Session Time Periods" (Campus Solutions Application Fundamentals)
Entry Point	SAD_UC_ENT_PT	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Entry Point	Map UCAS entry points to Campus Solutions academic levels and careers. The system uses this mapping when you import UCAS applications and when you create transactions to send to UCAS.
Home	SAD_UC_HOME	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Home	Map UCAS home values to Campus Solutions housing interest values. The system uses this mapping to populate the Housing Interest values in the Campus Solutions application records when you import UCAS applications.
Title	SAD_UC_TITLE_MP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Title	Map UCAS titles values to Campus Solutions name prefix values. The system uses this mapping when creating name records in Campus Community when you import UCAS applicant records.
UCAS, UTT Defaults	SAD_UC_USR_DEFAULT	Set Up SACR > User Defaults > UCAS, UTT Defaults	Set up user defaults that aid in data entry and search.

Page Name	Definition Name	Navigation	Usage
External System	SCC_EXT_SYS_TBL	Setup SACR > Product Related > Campus Community > Define Campus Community > Set Up > Define External Systems	Specify the external systems for UCAS, UTT, and Apply applicants.
National ID Type Table	NID_TYPE_TABLE	Set Up Common Objects > Foundation Tables > Personal > National ID Type	Assign UCASID, GTTRID, and APPLID national ID types to the country code GBR.

Enabling the UK Fields for All Institutions

Access the SA Features page (**Set Up SACR > Install > Student Admin Installation > SA Features**).

Select the **HESA, UCAS** check box to enable the HESA and UCAS specific fields in the system for all academic institutions.

Enabling the UK Fields for a Specific Institution

Access the Academic Institution 6 page (**Set Up SACR > Foundation Tables > Academic Structure > Academic Institution Table > Academic Institution 6**).

Select the **HESA, UCAS** check box to enable the HESA and UCAS specific fields in the system for a specific institution.

Setting Up Script Text for UCAS Confirmation and Clearing Enquiries

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

This example illustrates the fields and controls on the Program Action Reason Table page. You can find definitions for the fields and controls later on this page.

Program Action Reason Table

SetID: PSUNV

Program Action: ADMT Admit

Action Reason: CONF

Find View All First 1 of 1 Last					
*Effective Date:	03/11/2011	*Status:	Active		
*Description:	Offer Conditions Met				
Short Description:	CF to UF				
Long Description:	The applicant has met the offer conditions.				
Script Text:	Congratulations on your examination results. We are pleased to offer you admission to the PeopleSoft University. Please view the decision on UCAS Track and you will receive our offer letter soon.				

Field or Control	Description
Long Description	Enter the description that should appear on the UCAS Confirmation Enquiries page.
Script Text	Enter the description that should appear as script text on the UCAS Confirmation Enquiries page.

The following is an example of how the script text appears on the Confirmation Enquiries page:

1. Enter the script text and long description for a program action reason of CONF. CONF is mapped to program action of ADMT (Admit).
2. For Accept Firm decision, select program action of ADMT and action reason of CONF on the UCAS Confirmation page of the UCAS Configuration component.
3. For an applicant, to whom your institution gave a conditional offer, enter a decision of Accept on the Confirmation Entry page (and if required, approve it).
4. Because ADMT and CONF are mapped to the Accept Firm decision, the system automatically enters CONF as the action reason for the corresponding Campus Solutions application record.
5. The CONF script text and long description appear for this applicant on the Confirmation Enquiries page.

See Also

[Setting Up Admissions Program Actions and Program Action Reasons](#)

Setting Up Phone Numbers for UCAS Confirmation and Clearing Enquiries

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

<i>Field or Control</i>	<i>Description</i>
Telephone Contact 1	Enter the phone number that should appear as the Confirmation phone number on the UCAS Confirmation Enquiries page.
Telephone Contact 2	Enter the phone number that should appear as the Clearing phone number on the UCAS Confirmation Enquiries page.

These two fields appear on the Application Center Table, regardless of whether you have selected the UCAS, HESA check box on the Academic Institution 6 and SA Features pages.

See Also

[Setting Up Application Processing Centers](#)

Setting Up UCAS and Teacher Training Options

Access the UCAS Configuration page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Configuration**).

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

UCAS Configuration	UCAS Application Import	UTT/Apply Import	UCAS Decision Approval	UTT Decision Approval	
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Academic Institution PSGBR PeopleSoft University UK

*Institution Code

*Cycle

Application Import

*HESA Data Import: ☒ Add HESA Person fields

*Default Marital Status: ☐ Process Mismatched Applicants

Default Admin Function ☒ Update Matriculated Students

System Setup

*Database Link

☒ UCAS
☒ UTT
☒ Import Live
☒ Unit Results
☐ Unicode

☒ Create CAS Records
☐ Campus Used
☐ Disable Decision Link
☐ HRMS Decision Approver
☒ Contextual Data

Apply Setup

☒ Use Apply

Attribution Name

Attribution Email

Attribution User ID

Authentication Token

Address Usage

*Correspondence Address Type Mailing

*Home Address Type Home

*Telephone Type Home

*Mobile phone Type Mobile

*Email Type

Confirmation Enquiry

☐ Automatic Save

☐ Outcome Required

Field or Control	Description
Institution Code	Enter the institution code that UCAS supplied to your institution. The same institution code is used for UTT and Apply applications.

Field or Control	Description
Cycle	<p>Enter the admission cycle for which you want to import data. The system uses this value to determine the effective term for creating new person residency records for applicants.</p> <p>You must enter the new cycle value when UCAS makes updated views for the new cycle available through the ODBC-link. The system uses this value to determine which new fields must be imported. For example, the system imports the new ivStarK fields added by UCAS for 2010 only if the UCAS cycle is <i>2010</i> or greater.</p>

Application Import

Field or Control	Description
HESA Data Import	<p>Select to indicate how the system should update or add the Instance field values in your database when you import data from ivStarJ and ivgStarJ.</p> <p>Select <i>Update all values</i> to overwrite Instance field values with the imported values.</p> <p>Select <i>Update only null values</i> to add imported values to Instance fields that do not have any values.</p>
Add HESA Person Fields	<p>Select if you want the system to add new Person HESA Data field values when you import data from ivStarJ and ivgStarJ.</p>
Process Mismatched Applicants	<p>The system uses this check box's setting when you import data from ivStarJ and ivgStarJ.</p> <p>Select this check box if you want the system to continue processing the staging record if there is a mismatch on Name, Gender or Date of Birth between the incoming StarJ record and the existing person record. That is, if the check box is selected, then the system will log the mismatch and the processing of the staging record will continue.</p> <p>If you do not select the check box, then if there is a mismatch on Name, Gender or Date of Birth between the incoming StarJ record and the existing person record, then the system sets the staging record to <i>Error</i> and no further processing is done. You will need to resolve the mismatch either by updating the staging record or by updating the person record before the staging record can be re-processed.</p>

Field or Control	Description
Update Matriculated Students	<p>Select if you want the system to automatically update person records of matriculated students when you import person data from ivStarA, ivgStarA, ivStarK, ivgStarK, and Apply candidate details.</p> <p>If you do not select this check box, the system does not update the person record if the student has matriculated with an application associated with the current combination of Personal ID and Application Code. For example, suppose you import an UTT application choice (personal ID of 10910031010 and Application Code GT02) that has a corresponding application record with a PROG_ACTION = <i>MATR</i>. In such a case, if you have selected the Update Matriculated Students check box, the system will update the applicant's personal record with the imported UTT data. If you have not selected the check box, the system will not update the personal record with the imported UTT data because the current application has been matriculated.</p> <p>If the student has matriculated with a previous application not associated with the current combination of Personal ID and Application Code, then the system updates the personal data of the student, regardless of whether you have selected the Update Matriculated Students check box. For example, suppose you import an UTT application choice (personal ID of 10910031010 and Application Code GT01). The applicant has a previous UCAS application choice (personal ID of 10910031010 and application code of UC01) that has a corresponding application record with a PROG_ACTION = <i>MATR</i>. In such a case, even if you have not selected the Update Matriculated Students check box, the system will update the applicant's personal record in Campus Solutions with the imported UTT data.</p>
Default Marital Status	<p>Select the default marital status value that the system should assign to the imported applicant records.</p>
Default Admin Function	<p>Select a value to be the default administrative function when you add a 3C record using the 3C/Attachments page.</p> <p>Values are <i>ADMA</i> and <i>ADMP</i>.</p> <p>If you do not select a value here, the system enters <i>ADMA</i> as the default value when you add a 3C record using the 3C/Attachments page.</p>

System Setup

<i>Field or Control</i>	<i>Description</i>
Database Link	<p>Enter the name of the ODBC database link that the system uses to connect to UCAS.</p> <p>You can create a database link to UCAS by running the following command:</p> <pre>CREATE PUBLIC DATABASE LINK <i>link name</i> CONNECT TO <i>user_name</i> IDENTIFIED BY <i>password</i> USING '<i>service_name</i>'</pre> <p><i>link name</i> is the value you enter in the Database Link field of the UCAS Configuration page.</p> <p>UCAS supplies the <i>link name</i>, <i>user_name</i>, <i>password</i>, and <i>service_name</i> values to institutions.</p> <p>Refer to the ODBC-link Technical Manual for more information about connecting to the UCAS database.</p>
UCAS	<p>Select if you want to import UCAS applicant and application data.</p> <p>If you do not select this check box, the import process does not load the UCAS data into the Campus Solutions tables.</p>
UTT	<p>Select if you want to import UTT applicant and application data.</p> <p>If you do not select this check box, the import process does not have the option to load the UTT data into the Campus Solutions tables.</p> <p>The UTT-specific pages (such as the UTT Decision Approval page) appear on the UCAS Configuration component only if you select this check box.</p>
Import Live	<p>Select if you want to import live data from UCAS or UTT into the Campus Solutions tables through the staging tables. UCAS data that contains errors will remain in the staging table.</p> <p>If you do not select this check box, the import process can only be run to post the data from the staging tables to the Campus Solutions tables.</p>

Field or Control	Description
Unit Results	Select if you want to import unit grade results of your applicants from ivUnitResults.
Unicode	Select if you want to import data from the Unicode version of applicant views.
Create CAS Records	<p>Select if you want the import process to automatically create a CAS record for a Campus Solutions application when the applicant's StarK record has a Visa Required value of Y.</p> <p>See Understanding PBI Data Exchange</p>
Campus Used	<p>Select if you have multiple institution campuses for UCAS or UTT admissions. Otherwise, do not select if you have a single institution campus for UCAS or UTT admissions.</p> <p>This check box indicates whether or not the UCAS Campus field is used by your institution. If the UCAS Campus field is not used, then when the application choices are imported with a null value the UCAS Campus field is populated with an asterisk (*), and this value is used as part of the Course Mapping to get the Campus Solutions academic program, plan, or campus.</p>
Disable Decision Link	Select to disable the Decision Entry link on the UCAS Applicant Summary page (Student Admissions, UCAS Processing, UCAS Applications, UCAS Applicant Summary), the UTT Applicant Summary page (Student Admissions, UCAS Processing, UTT Applications, UTT Applicant Summary), the UCAS Application Notes page (Student Admissions, UCAS Processing, UCAS Application Notes), and the UTT Application Notes page (Student Admissions, UCAS Processing, UTT Application Notes).
HRMS Decision Approver	<p>Select if you want the Approver and Decision Maker lookups to display person IDs from PeopleSoft HCM (HRMS) records (EMPLOYEE_NAME_VW).</p> <p>If you do not select this check box, the Approver and Decision Maker lookups display person IDs from only the People records (PEOPLE_SRCH).</p>
Contextual Data	Select if you want to import data from the Contextual Data views (cvRefSchoolContextualData and ivContextual).

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, you should read the additional documentation to understand the setup, functional, and technical implementation considerations.

See:

"Integrating Person Data" (Campus Solutions Application Fundamentals)

"Integrating Setup Data" (Campus Solutions Application Fundamentals)

"Monitoring Integrations Using the Integrity Utility" (Campus Solutions Application Fundamentals)

See *Campus Solutions to Human Capital Management Integration* in My Oracle Support (ID 1553319.1).

Apply Setup

Here, you can configure the settings for importing applications through the Apply interface.

Field or Control	Description
Use Apply	Select to enable the Apply check box on the Import Applicant Data page. Selecting this also makes the UTT/Apply Import page appear.
Default Decision Maker	If you select this, the Decision Maker field in Apply Decision defaults to the ID of the person entering the decision. By default, this check box is not selected. If this isn't selected or the person entering the decision doesn't have an ID, the Default Maker field defaults to blank.
Attribution Name	The value here is used to populate attribution.full_name in the meta key of POST requests.
Attribution Email	The value here is used to populate attribution.email in the meta key of POST requests.
Attribution User ID	The value here is used to populate attribution.user_id in the meta key of POST requests.
Authentication Token	The value here is used to populate the authorization token in each request header.

Address Usage

The system uses these values when it imports applicant address data from ivStarA and ivgStarA views.

Field or Control	Description
Correspondence Address Type	Select the address type that you want the import process to assign to the imported UCAS and UTT correspondence addresses and to the Apply candidate address.
Home Address Type	Select the address type that you want the import process to assign to the imported UCAS and UTT home addresses. The home and correspondence address values must be different.
Telephone Type	Select the phone type that you want the import process to assign to the imported UCAS, UTT, and Apply telephone numbers.
Mobile Phone Type	Select the phone type that you want the import process to assign to the imported UCAS and UTT mobile phone numbers.
Email Type	Select the email type that you want the import process to assign to the imported UCAS, UTT, and Apply email addresses.

For information about defining address types, see "Defining Address Types" (Campus Community Fundamentals).

Confirmation Enquiry

After exam results are published, applicants may want to confirm with an institution whether or not they have been accepted. Also, during this Confirmation processing period, an institution will also handle enquiries from rejected applicants who may want to be considered through Clearing. Use the Confirmation Enquiry group box to configure how to handle such applicant enquiries related to Confirmation and Clearing.

Field or Control	Description
Automatic Save	Select to have the system automatically save the record once you have entered the mandatory values on the UCAS Confirmation Enquiries page. If you do not select this check box, you will need to click the Save button on the UCAS Confirmation Enquiries page, after entering the mandatory values.

Field or Control	Description
Outcome Required	Select to make the Action Required and Outcome Codes fields mandatory to save a Notes record on the UCAS Confirmation Enquiries page. If you do not select this check box, the Action Required and Outcome Codes fields become optional fields.

Setting Up UCAS Application Import Defaults

Access the UCAS Application Import page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Application Import**).

When you import ivStarC application data for the first time, the system creates Campus Solutions application records for the imported data. You can use the Maintain Applications component to access the Campus Solutions application records. The import process uses the values you set up on the UCAS Application Import page to create the Campus Solutions application records for the imported ivStarC application data.

Field or Control	Description
Initial Action Reason	<p>Enter the default action reason that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data.</p> <p>Define the initial action reasons in the Program Action Table page. Only action reasons mapped with the program action of <i>APPL</i> appear on the UCAS Application Import page.</p> <p>For information about setting up action reasons, see Setting Up Admissions Program Actions and Program Action Reasons</p>
Admit Type	<p>Enter the admit type that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data.</p> <p>Define the admit types in the Admit Type Table page. If you have defined an admit type for a career, ensure that the Admit Type in the UCAS Application Import page matches the career that is associated with the ivStarC application data.</p>
Academic Level	<p>Select the default academic level that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values. The import process assigns this default value only if you do not map the academic levels to entry points on the Entry Point Mapping page.</p>

Field or Control	Description
Application Center	<p>Select the default application center that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. The import process uses this default value only if you do not map application centers to UCAS courses and Campus Solutions careers, programs, and plans on the UCAS Course page.</p> <p>Define the application processing centers in the Application Center Table page. If you have defined an application center for a career, ensure that the application center selected on the UCAS Application Import page matches the career with which the ivStarC application data is associated.</p> <p>See Setting Up Application Processing Centers</p> <p>See "Setting Security for Application Centers" (Campus Solutions Application Fundamentals)</p>
Application Fee Type	Select the application fee type that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values.
Application Method	Select the application method that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values.
Housing Interest	Set the value to be used when the ivStarC Home value is not mapped or the application is imported from ivStarZ1.
Campus	Enter the default campus that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values. The import process assigns the default value only if you do not map a campus to UCAS courses and Campus Solutions careers, programs, and plans on the UCAS Course page.
UCAS Course Code	Enter the default course code that you want the import process to assign to the imported ivStarC application data. The import process assigns the default value only to imported applications that do not have a course code.

Field or Control	Description
Earliest Application Year	<p>Enter the application year for which you want the process to import applications. If you leave the field blank, the import process may import applications from ivStarC for both previous and current admission cycles depending on timestamp values.</p> <p>Suppose, your institution is implementing Campus Solutions UCAS for the 2010 cycle (the UCAS cycle is 2010 on the UCAS Configuration page). The institution wants to prevent the import of 2009 applications. In this case, enter <i>2010</i> in the Earliest Application Year field.</p>
Previous Name Type	<p>Select the name type that the import process should use to create the Previous Name records in Campus Solutions. The import process creates the previous Name records from the Forenames and Previous Surname values that it imports from the StarN views.</p> <p>The available values for this field does not include <i>Primary</i> or <i>Preferred</i> because the import process uses these two types when it creates applicant's current Name records in Campus Solutions.</p> <p>To define name types, select Set Up Common Objects > Foundation Tables > Personal > Name Type.</p> <p>After running the import process, both the previous names and primary/preferred names can be viewed on the Names page (Campus Community, Personal Information, Biographical, Names).</p>

Note: The import process assigns the academic load of *Full time* and the notification plan of *Regular* to the Campus Solutions application records related to the imported ivStarC application data. The values *Full time*, *Part time*, and *Regular* are delivered with your system as translate values.

Setting Up UTT and Apply Application Import Defaults

Access the UTT/Apply Import page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT/Apply Import**).

This page appears when you select **UTT** or **Use Apply** on the UCAS Configuration page.

When you import application data for the first time, the system creates Campus Solutions application records for the imported data. You can use the Maintain Applications component to access the Campus Solutions application records. The import process uses the values you set up on this page to create the Campus Solutions application records for the imported ivgStarG application data for UTT and Apply applications.

Field or Control	Description
Initial Action Reason	<p>Enter the default action reason that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data. If you do not enter an initial action reason, the system creates Campus Solutions application records with an <i>APPL</i> program action and no action reason for the imported ivgStarG application data.</p> <p>Define the initial action reasons in the Program Action Table page. Only action reasons mapped with the program action of <i>APPL</i> appear on the UTT/Apply Import page.</p> <hr/> <p>Note: This field isn't considered in Apply applications. For Apply, the initial action reason is defined in Apply Program Actions.</p> <hr/>
Admit Type	<p>Enter the admit type that you want the import process to assign to the Campus Solutions application records related to the imported application data.</p> <p>Define the admit types on the Admit Type Table page. If you have defined an admit type for a career, ensure that the default Admit Type on the UTT/Apply Import page matches the career with which the application data is associated.</p>
Academic Level	<p>Select the academic level that you want the import process to assign to the Campus Solutions application records related to the imported application data. Values for this field are delivered with your system as translate values.</p>
Application Center	<p>Select the default application center that you want the import process to assign to the Campus Solutions application records related to the imported application data. The import process uses this default value only if you do not map application centers on the UTT Course or Apply Course page.</p> <p>Define the application processing centers in the Application Center Table page. If you have defined an application center for a career, ensure that the application center selected in the UTT/Apply Import page matches the career with which the application data is associated.</p>
Application Fee Type	<p>Select the application fee type that you want the import process to assign to the Campus Solutions application records related to the imported application data. Values for this field are delivered with your system as translate values.</p>
Application Method	<p>Select the application method that you want the import process to assign to the Campus Solutions application records related to the imported application data. Values for this field are delivered with your system as translate values.</p>

Field or Control	Description
Campus	Enter the default campus that you want the import process to assign to the Campus Solutions application records related to the imported application data. Values for this field are delivered with your system as translate values. The import process assigns the default value only if you do not map a campus on the UTT Course or Apply Course page.
Housing Interest	If you define a value here, it's used as the default for new UTT and Apply applications. Otherwise, this is set to blank in the applications.
Notification Plan	If you define a value here, it's used to override the default value Regular Admission Decision (REG) for new UTT and Apply applications.
UTT Course Code	<p>Enter the default course code that you want the import process to assign to the imported ivgStarG application data. The import process assigns the default value only to imported applications that do not have a course code.</p> <hr/> <p>Note: This field isn't considered in Apply applications.</p> <hr/>
Earliest Application Year	<p>Enter the application year for which you want the process to import applications. If you leave the field blank, the import process may import applications from ivgStarG for both previous and current admission cycles depending on timestamp values.</p> <p>Suppose, your institution is implementing Campus Solutions UTT for the 2010 cycle (the UCAS cycle is 2010 on the UCAS Configuration page). The institution wants to prevent the import of 2009 applications. In this case, enter <i>2010</i> in the Earliest Application Year field.</p> <hr/> <p>Note: This field isn't considered in Apply applications.</p> <hr/>

Field or Control	Description
Previous Name Type	<p>Select the name type that the import process should use to create the Previous Name records in Campus Solutions. The import process creates the previous Name records from the Forenames and Previous Surname values that it imports from the StarN views.</p> <p>The available values for this field does not include <i>Primary</i> or <i>Preferred</i> because the import process uses these two types when it creates applicant's current Name records in Campus Solutions.</p> <p>To define name types, select Set Up Common Objects > Foundation Tables > Personal > Name Type.</p> <p>After running the import process, both the previous names and primary/preferred names can be viewed on the Names page (Campus Community, Personal Information, Biographical, Names).</p> <hr/> <p>Note: This field isn't considered in Apply applications.</p> <hr/>

Note: The import process assigns the academic load of *Full time* or *Part Time* based on the value of the **PartTime** field in the imported ivgStarG record. The values *Full time*, *Part time*, and *Regular* are delivered with your system as translate values.

For Apply applications, if the academic load is not defined in Apply Course, the import process assigns the academic load of *Full time* or *Part Time* based on the imported Study Mode value.

Setting Up UCAS Decision Approval Options

Access the UCAS Decision Approval page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Decision Approval**).

Select the **Interview**, **Unconditional Offer**, **Conditional Offer**, **Rejection**, and **Withdrawal** check boxes to indicate that a user must use one of the UCAS Decision Approval processing pages to review and approve the decisions before the institution communicates the decisions to UCAS.

See [Approving or Rejecting a UCAS Decision](#)

See [Approving or Rejecting Multiple UCAS Decisions](#)

Select the **Confirmation Acceptance** and **Confirmation Rejection** check boxes to indicate that a user must use the UCAS Confirmation Approval page or the Quick Confirmation Approval page to review and approve the UCAS Confirmation decision before the institution communicates the decisions to UCAS.

See [Approving or Rejecting a UCAS Confirmation Decision](#)

See [Approving or Rejecting Multiple UCAS Confirmation Decisions](#)

Select the **Release to Clearing** check box to indicate that a user must use the UCAS Release Approval page to review and approve the release before the institution communicates the decisions to UCAS.

See [Approving or Rejecting the Release into Clearing Decision](#)

Setting Up UTT Decision Approval Options

Access the UTT Decision Approval page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT Decision Approval**).

Select the **Interview**, **Unconditional Offer**, **Conditional Offer**, **Rejection**, and **Withdrawal** check boxes to indicate that a user must use the UTT Decision Approval processing page to review and approve the decisions before the institution communicates the decisions to UTT. To navigate to the UTT Decision Approval processing page, select Student Admissions, UCAS Processing, UTT Decision Approval, Decision Approval.

See [Approving or Rejecting a UTT Decision](#)

The **Confirmation Acceptance** and **Confirmation Rejection** check boxes do not have any impact on the system.

Setting Up UCAS Program Action Reasons

Access the UCAS Program Actions page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Program Actions**).

This example illustrates the fields and controls on the UCAS Program Actions page (1 of 3). You can find definitions for the fields and controls later on this page.

UTT Decision Approval UCAS Program Actions UIT Program Actions UCAS Confirmation UTT Confirmation				
Academic Institution:		PSGBR	PeopleSoft University UK	
Institution Decisions				
	Program Action		Action Reason	
*Conditional Offer:	<input type="text" value="APPL"/>	Application	<input type="text" value="COND"/>	Conditional Offer
*Amended Conditional Offer:	<input type="text" value="APPL"/>	Application	<input type="text" value="ACND"/>	Amended Conditional Offer
*Unconditional Offer:	<input type="text" value="APPL"/>	Application	<input type="text" value="UNCD"/>	Unconditional Offer
*Amended Unconditional Offer:	<input type="text" value="APPL"/>	Application	<input type="text" value="AUNC"/>	Amended Unconditional Offer
*Rejection:	<input type="text" value="DENY"/>	Deny	<input type="text" value="REJN"/>	Rejection
*Amended Rejection:	<input type="text" value="DENY"/>	Deny	<input type="text" value="AREJ"/>	Amended Rejection
*Interview:	<input type="text" value="APPL"/>	Application	<input type="text" value="INTV"/>	Interview
*Amended Interview:	<input type="text" value="APPL"/>	Application	<input type="text" value="AINT"/>	Amended Interview
*Course Full:	<input type="text" value="DENY"/>	Deny	<input type="text" value="CRFL"/>	Course Full
*Amended Course Full:	<input type="text" value="DENY"/>	Deny	<input type="text" value="ACFL"/>	Amended Course Full
*Withdrawal:	<input type="text" value="WAPP"/>	Applicant Withdrawal	<input type="text" value="WDRV"/>	Withdrawal
*Amended Withdrawal:	<input type="text" value="WAPP"/>	Applicant Withdrawal	<input type="text" value="AWDW"/>	Amended Withdrawal
*UF Withdrawal - Institution:	<input type="text" value="WADM"/>	Administrative Withdrawal	<input type="text" value="UFWI"/>	UF Withdrawal - Institution
*UF Amendment:	<input type="text" value="ADMT"/>	Admit	<input type="text" value="UFAM"/>	UF Amendment
*Course Correction:	<input type="text" value="PRGC"/>	Program Change	<input type="text" value="CRCR"/>	Course Correction

This example illustrates the fields and controls on the UCAS Program Actions page (2 of 3). You can find definitions for the fields and controls later on this page.

Applicant Replies		
	Program Action	Action Reason
*Conditional Firm:	APPL Application	CNDF Conditional Firm
*Cond Firm - Upgraded:	APPL Application	CFUP Conditional Firm - Upgraded
*Conditional Insurance:	APPL Application	CNDI Conditional Insurance
*Cond Insurance - Downgraded:	APPL Application	CIDN Cond Insurance - Downgraded
*Unconditional Firm:	ADMT Admit	UNCF Unconditional Firm
*Uncond Firm - Upgraded:	ADMT Admit	UFUP UI to UF - pre-confirmation
*Unconditional Insurance:	APPL Application	UNCI Unconditional Insurance
*Uncond Insurance - Downgraded:	APPL Application	UIDN Uncond Insurance - Downgraded
*Conditional Decline:	WAPP Applicant Withdrawal	CNDD Conditional Decline
*Unconditional Decline:	WAPP Applicant Withdrawal	UNDC Unconditional Decline

This example illustrates the fields and controls on the UCAS Program Actions page (3 of 3). You can find definitions for the fields and controls later on this page.

UCAS Amendments		
	Program Action	Action Reason
*Changed Course:	PRGC Program Change	CHCR Changed Course
*Changed Campus:	PRGC Program Change	CHCM Changed Campus
*Changed Entry Point:	PRGC Program Change	CHEP Changed Entry Point
*Changed Term:	PRGC Program Change	CHTR Changed Term
*Cancelled Choice:	WAPP Applicant Withdrawal	CACH Cancelled Choice
*Withdrawal - UCAS:	WAPP Applicant Withdrawal	WDUC Withdrawal - UCAS
*UF Withdrawal - UCAS:	WAPP Applicant Withdrawal	UFWU UF Withdrawal - UCAS
*Withdrawal Re-instated:	APPL Application	WDRE Withdrawal Reinstated
*Reject by Default:	DENY Deny	RBDE Reject by Default
*Decline by Default:	WAPP Applicant Withdrawal	DBDE Decline by Default

Institution Decisions

When you generate decision transactions to send to UCAS, the system uses the **Institution Decisions** group box values to update the Campus Solution application records (related to the imported application data). The following table describes when the system uses the program action and reason values for the institution decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Conditional Offer	You make a conditional offer.
Amended Conditional Offer	You amend a decision to conditional offer. This decision is applicable to an LA transaction.

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Unconditional Offer	You make an unconditional offer.
Amended Unconditional Offer	You amend a decision to unconditional offer. This decision is applicable to an LA transaction.
Rejection	You reject an application.
Amended Rejection	You amend a decision to rejection. This decision is applicable to an LA transaction.
Interview	You enter a decision of interview.
Amended Interview	You amend a decision to interview. This decision is applicable to an LA transaction.
Course Full	You enter a decision of course full.
Amended Course Full	You amend a decision to course full. This decision is applicable to an LA transaction.
Withdrawal	Your institution withdraws an application.
Amended Withdrawal	You amend a decision to be withdrawn by the institution. This decision is applicable to an LA transaction.
UF Withdrawal - Institution	Applicant declines the offer. This decision is applicable to an RW transaction.
UF Amendment	You amend a course, entry date, or entry point of an applicant who has firmly accepted an unconditional offer or who has accepted a Clearing place. This decision is applicable to an RA transaction.
Course Correction	When you correct a course, the system does not automatically generate LC transactions for UCAS and as a consequence the system does not update the Campus Solutions application record using the program action/reason for Course Correction.

Applicant Replies

The system uses the **Applicant Replies** group box values when the Reply values you imported change. The following table describes when the system uses the program action and reason values for the applicant reply decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Conditional Firm	The applicant replies for the first time by accepting a conditional offer firmly.
Cond Firm – Upgraded	<p>The applicant changes his or her reply from Conditional Insurance to Conditional Firm prior to confirmation.</p> <p>This can be set to the same values as Conditional Firm if your institution does not want to distinguish between initial replies and updated replies.</p>
Conditional Insurance	The applicant replies for the first time by accepting a conditional offer as insurance.
Cond Insurance – Downgraded	<p>The applicant changes his or her reply from Conditional Firm to Conditional Insurance.</p> <p>This can be set to the same values as Conditional Insurance if your institution does not want to distinguish between initial replies and updated replies.</p>
Unconditional Firm	The applicant replies for the first time by accepting an unconditional offer firmly.
Uncond Firm – Upgraded	<p>The applicant changes his or her reply from Unconditional Insurance to Unconditional Firm prior to confirmation.</p> <p>This can be set to the same values as Unconditional Firm if your institution does not want to distinguish between initial replies and updated replies.</p>
Unconditional Insurance	The applicant replies for the first time by accepting an unconditional offer as insurance.
Uncond Insurance – Downgraded	<p>The applicant changes his or her reply from Unconditional Firm to Unconditional Insurance.</p> <p>This can be set to the same values as Unconditional Insurance if your institution does not want to distinguish between initial replies and updated replies.</p>

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Conditional Decline	The applicant declines a conditional offer.
Unconditional Decline	The applicant declines an unconditional offer. The applicant declines an unconditional offer made by your institution for an Adjustment choice (Choice Number = 6, Decision = U, Reply = D and Adjustment is not D).

UCAS Amendments

The system uses the **UCAS Amendments** group box values when UCAS initiates changes and you import these changes from ivStarC and ivStarK. The following table describes when the system uses the program action and reason values for the UCAS amendments:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Changed Course	UCAS changes a course.
Changed Campus	UCAS changes a campus.
Changed Entry Point	UCAS changes an entry point.
Changed Term	UCAS changes entry year, entry month, or both, which results in a change of admit term for the applicant.
Cancelled Choice	UCAS cancels an application choice (in ivStarC, the value of the ChoiceCancelled field is <i>Y</i>).
Withdrawal - UCAS	UCAS either notifies that the applicant has withdrawn all application choices (in ivStarK, the value of the Withdrawn field is <i>C</i>) or applicant has withdrawn only one choice (in ivStarC, the value of Decision is <i>W</i>).
UF Withdrawal - UCAS	Applicants with an unconditional firm offer for an application choice notify UCAS that they want to withdraw their applications (in ivStarK, the value of the Withdrawn field is <i>U</i>).

Program Action and Action Reason Values For	Used by the System When
Withdrawal Re-instated	<p>UCAS notifies that a previously withdrawn application choice can be considered by the institution. The system uses the Withdrawal Re-instated field values when UCAS changes the ivStarC decision value to blank from <i>W</i>.</p> <p>Note that the system does not process the <i>R</i> values for the ivStarK Withdrawn fields. This change is not specific to an application choice; as a consequence, the system does not process this change when you import data. To process this type of change, you must change the decision value to blank from <i>W</i> for an application choice.</p>
Reject by Default	<p>UCAS rejects the application because your institution did not communicate any decision to UCAS (in ivStarC, the Action field is <i>R</i>).</p>
Decline by Default	<p>UCAS declines an offer because the applicant did not reply (in ivStarC, the Action field is <i>D</i>).</p> <p>Note that in ivStarC, if the Action field is <i>U</i> (updated from insurance to firm, CI to CF, or UI to UF), then the system picks up the change in the ivStarC Reply value.</p>

The following scenario shows how Campus Solutions uses the values set up on the UCAS Program Actions page:

1. On the UCAS Program Actions page, for the Rejection decision enter a program action of *DENY* and an action reason of *R*.
2. Enter a decision of *Rejection* for a UCAS application on the Initial Decision Entry page. If approval is required, use the UCAS Decision Approval page to approve the Rejection decision.
3. Select the **Generate Transaction** check box on the Transaction Processing page and run the Transaction Processing Application Engine (SAD_UC_TRAN) process to generate a transaction for the Rejection decision.
4. The system sets the program action to *DENY* and the action reason to *R* in the Campus Solutions application record of the corresponding UCAS application number.

Setting Up UTT Program Action Reasons

Access the UTT Program Actions page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT Program Actions**).

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









UTT Decision Approval
UCAS Program Actions
UTT Program Actions
UCAS Confirmation
UTT Confirmation

















Academic Institution: PSGBR PeopleSoft University UK

Institution Decisions

	Program Action	Action Reason
*Conditional Offer:	APPL Application	COND Conditional Offer
*Amended Conditional Offer:	APPL Application	ACND Amended Conditional Offer
*Unconditional Offer:	APPL Application	UNCD Unconditional Offer
*Amended Unconditional Offer:	APPL Application	AUNC Amended Unconditional Offer
*Rejection:	DENY Deny	REJN Rejection
*Amended Rejection:	DENY Deny	AREJ Amended Rejection
*Rejection - English:	DENY Deny	REJE Rejection - English
*Amended Rejection - English:	DENY Deny	ARJE Amended Rejection - English
*Rejection - Maths:	DENY Deny	REJM Rejected - Maths
*Amended Rejection - Maths:	DENY Deny	ARJM Amended Rejection - Maths
*Rejection - Science:	DENY Deny	REJS Rejection - Science
*Amended Rejection - Science:	DENY Deny	ARJS Amended Rejection - Science
*Course Closed:	DENY Deny	CRCL Course Closed
*Amended Course Closed:	DENY Deny	ACRC Amended Course Closed
*Interview:	APPL Application	INTV Interview
*Amended Interview:	APPL Application	AINV Amended Interview
*Withdrawal:	WAPP Applicant Withdrawal	WDRV Withdrawal
*Amended Withdrawal:	WAPP Applicant Withdrawal	AWDV Amended Withdrawal
*UF Withdrawal - Institution:	WADM Administrative Withdrawal	UFWI UF Withdrawal - Institution
*UF Amendment:	ADMT Admit	UFAM UF Amendment

This example illustrates the fields and controls on the UTT Program Actions page (2 of 2). You can find definitions for the fields and controls later on this page.

Applicant Replies		
	Program Action	Action Reason
*Conditional Firm:	APPL  Application	CNDF  Conditional Firm
*Unconditional Firm:	ADMT  Admit	UNCF  Unconditional Firm
*Conditional Decline:	WAPP  Applicant Withdrawal	CNDD  Conditional Decline
*Unconditional Decline:	WAPP  Applicant Withdrawal	UNDC  Unconditional Decline

UTT Amendments		
	Program Action	Action Reason
*Changed Course:	PRGC  Program Change	CHCR  Changed Course
*Changed Campus:	PRGC  Program Change	CHCM  Changed Campus
*Changed Term:	PRGC  Program Change	CHTR  Changed Term
*Withdrawal - UTT:	WAPP  Applicant Withdrawal	WDGT  Withdrawal - GTTR
*UF Withdrawal - UTT:	WAPP  Applicant Withdrawal	UFWG  UF Withdrawal - GTTR
*Withdrawal Re-instated:	APPL  Application	WDRE  Withdrawal Reinstated
*Reject by Default:	DENY  Deny	RBDE  Reject by Default
*Decline by Default:	WAPP  Applicant Withdrawal	DBDE  Decline by Default

Institution Decisions

When you generate UTT decision transactions, the system uses the **Institution Decisions** group box values to update the Campus Solution application records (related to the imported UTT application data). The following table describes when the system uses the program action and the reason values for the institution decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Conditional Offer	You make a conditional offer.
Amended Conditional Offer	You amend a decision to conditional offer. This decision is applicable to an LA transaction.
Unconditional Offer	You make an unconditional offer.
Amended Unconditional Offer	You amend a decision to unconditional offer. This decision is applicable to an LA transaction.
Rejection	You reject an application.

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Amended Rejection	You amend a decision to rejection. This decision is applicable to an LA transaction.
Rejection - English	You enter a decision of <i>Not qualified in English</i> .
Amended Rejection - English	You amend a decision to <i>Not qualified in English</i> . This decision is applicable to an LA transaction.
Rejection - Maths	You enter a decision of <i>Not qualified in Mathematics</i> .
Amended Rejection - Maths	You amend a decision to <i>Not qualified in Mathematics</i> . This decision is applicable to an LA transaction.
Rejection - Science	You enter a decision of <i>Not qualified in Science</i> .
Amended Rejection - Science	You amend a decision to <i>Not qualified in Science</i> . This decision is applicable to an LA transaction.
Course Closed	You enter a decision of <i>Course Closed</i> .
Amended Course Closed	You amend a decision to <i>Course Closed</i> . This decision is applicable to an LA transaction.
Interview	You enter a decision of <i>Interview</i> and specify the interview date for the transaction.
Amended Interview	You amend a decision to <i>Interview</i> and specify the interview date for the transaction. This decision is applicable to an LA transaction.
Withdrawal	Your enter a decision of <i>Withdrawal</i> .
Amended Withdrawal	You amend a decision to <i>Withdrawal</i> . This decision is applicable to an LA transaction.
UF Amendment	You amend an unconditional firm application.

Applicant Replies

The system uses the **Applicant Replies** group box values when the Reply values you imported change. The following table describes when the system uses the program action and the reason values for the applicant replies:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Conditional Firm	The applicant accepts a conditional offer firmly.
Unconditional Firm	The applicant accepts a unconditional offer firmly.
Conditional Decline	The applicant declines a conditional offer.
Unconditional Decline	The applicant declines an unconditional offer.

UTT Amendments

The system uses the **UTT Amendments** group box values when UTT initiates changes and you import these changes from ivgStarG and ivgStarK. The following table describes when the system uses the program action and the reason values for the UTT amendments:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Changed Course	UTT changes a course.
Changed Campus	UTT changes a campus.
Changed Term	UTT changes entry year, entry month, or both, resulting in a change of admit term for the applicant.
Withdrawal - UTT	UTT notifies that the applicant has withdrawn all application choices (in ivgStarK, Withdrawn field is <i>C</i> or in ivgStarG, Decision field is <i>W</i>).
UF Withdrawal - UTT	Applicants with an unconditional firm offer for an application choice notify UCAS that they want to withdraw their applications (in ivgStarK, Withdrawn field is <i>U</i>).

Program Action and Action Reason Values For	Used by the System When
Withdrawal Re-instated	<p>UTT notifies that a previously withdrawn application choice can be considered by the institution. The system uses the Withdrawal Re-instated field values when UTT changes the ivgStarG decision value to blank from <i>W</i>.</p> <p>Note that the system does not process the <i>R</i> values for the ivgStarK Withdrawn fields. This change is not specific to an application choice and, as a consequence, the system does not process this change when you import data. To process this type of change, you must change the decision value to blank from <i>W</i> for an application choice.</p>
Reject by Default	UTT rejects the application because your institution did not communicate any decision to UCAS (in ivgStarG, Action field is <i>R</i>).
Decline by Default	UTT declines an offer because the applicant did not reply (in ivgStarG, Action field is <i>D</i>).

Setting Up Apply Program Action Reasons

Access the Apply Program Actions page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > Apply Program Actions**).

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

UCAS Program Actions

UTT Program Actions

UCAS Confirmation

UTT Confirmation

Apply Program Actions

Academic Institution PSGBR

PeopleSoft University UK

Application Status Mapping

Personalize

Find

First 1-8 of 8

Last

*Application Status	Description	*Program Action	Description	Action Reason	Description		
1 awaiting_provider_decision	Pending	APPL	Application	NAPL	New Apply Application	+	-
2 conditions_not_met	Conditions not met	DENY	Deny	CDNM	Conditions Not Met	+	-
3 declined	Declined	WAPP	Applicant Withdrawal	OFDC	Offer Declined	+	-
4 offer	Offer	APPL	Application	OFFR	Offer	+	-
5 pending_conditions	Accepted	APPL	Application	OFAC	Offer Accepted	+	-
6 recruited	Conditions met	ADMT	Admit	CNMT	Conditions Met	+	-
7 rejected	Rejected	DENY	Deny	REJN	Rejection	+	-
8 withdrawn	Withdrawn	WAPP	Applicant Withdrawal	WDRW	Withdrawal	+	-

Use this page to create mappings between an application status and program actions and reasons for Apply applications.

Related Links

[Pages Used to Process UCAS and UTT Reference Data](#)

Setting Up UCAS Program Action Reasons for Confirmation, Clearing, and Adjustment

Access the UCAS Confirmation page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Confirmation**).

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

UTT Decision Approval UCAS Program Actions UIT Program Actions UCAS Confirmation UTT Confirmation			
Academic Institution:		PSGBR	PeopleSoft University UK
UCAS Confirmation Decisions			
	Program Action	Action Reason	
*Accept Firm:	ADMT Admit	ACCF Accept Firm	
*Accept Insurance:	APPL Application	ACCI Accept Insurance	
*Reject Firm:	DENY Deny	REJF Reject Firm	
*Reject Insurance:	DENY Deny	REJI Reject Insurance	
*Amended Confirmation:	APPL Application	ACNF Amended Confirmation	
*Confirmation with Change:	ADMT Admit	CNFC Confirmation with Change	
*Delayed Conditional:	APPL Application	DCON Delayed Conditional	
UCAS Confirmation Amendments			
	Program Action	Action Reason	
*UF Elsewhere:	WAPP Applicant Withdrawal	UFEL UF Elsewhere	
*Clearing Elsewhere:	WAPP Applicant Withdrawal	CLEL Clearing Elsewhere	
*Adjustment Decline:	WAPP Applicant Withdrawal	ADDC Adjustment Decline	
*UI to UF at Confirmation:	ADMT Admit	UIUF UI to UF at Confirmation	
*CI to CF at Confirmation:	APPL Application	CICF CI to CF at Confirmation	

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

UCAS Enquiry			
	Program Action	Action Reason	
*Adjustment Acceptance:	ADMT Admit	ADAC Adjustment Acceptance	
*Clearing Application:	APPL Application	CLAP Clearing Application	
*Clearing Acceptance:	ADMT Admit	CLAC Clearing Acceptance	
*Clearing Rejection:	DENY Deny	CLRJ Clearing Rejection	
*Release to Clearing:	WADM Administrative Withdrawal	RLCL Release to Clearing	
*RPA Applicant:	ADMT Admit	RPAA RPA Applicant	

UCAS Confirmation Decisions

When the system generates UCAS confirmation transactions (RD transactions), it uses the **UCAS Confirmation Decisions** group box values to update the Campus Solutions application records (related to the imported UCAS application data). The following table describes when the system uses the program action and reason values for the UCAS Confirmation decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Accept Firm	<p>The institution confirms acceptance for a conditional firm application. That is, Decision is <i>A</i> (Accept) and Reply is <i>F</i> (Firm).</p> <p>Also, the system uses this value in ivStarC update processing when the Reply changes to <i>F</i>, the Decision is <i>U</i>, and the application was previously <i>CF</i>.</p>
Accept Insurance	<p>The institution confirms acceptance for a conditional insurance application. That is, Decision is <i>A</i> and Reply is <i>I</i> (Insurance).</p> <p>To prevent an Accept Insurance row being added when the choice is <i>UF</i> elsewhere, the system uses the following process: If Decision is <i>A</i> and existing Reply value of the choice is <i>I</i> and the current action/reason is not <i>UF Elsewhere</i>, the system gets the new Program Action and Action Reason for <i>Accept Insurance</i>.</p>
Reject Firm	The institution confirms rejection for a conditional firm application. That is, Decision is <i>R</i> (Reject) and Reply is <i>F</i> .
Reject Insurance	The institution confirms rejection of a conditional insurance application. That is, Decision is <i>R</i> and Reply is <i>I</i> .
Amended Confirmation	You change a Confirmation decision and a new RD transaction is generated.
Confirmation with Change	You change Course or Year as part of a Confirmation decision. That is, Decision is <i>C</i> (Conditional Offer) in an RD transaction.
Delayed Conditional	You delay the conditional offer. That is, Decision is <i>D</i> (Delayed Confirmation Decision) in an RD transaction.

For an applicant, you can enter the institution decision and view the applicant reply on the Initial Decision Entry page and the Decision Processing page.

See [Entering an Initial Admission Decision for a UCAS Application Choice](#)

See [Entering or Updating an Admission Decision for a UCAS Application Choice](#)

See [Entering a Decision for Multiple UCAS Application Choices](#)

UCAS Confirmation Amendments

When you receive Confirmation amendments from UCAS, the system uses the **UCAS Confirmation Amendments** group box values to update the Campus Solution application records (related to the imported UCAS application data). The following table describes when the system uses the program action and the reason values for the UCAS Confirmation amendments:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
UF Elsewhere	The applicant is UF (unconditional firm) at another institution and the local choice is UI (unconditional insurance) or CI (conditional insurance).
Clearing Elsewhere	Another institution has accepted the applicant through Clearing.
Adjustment Decline	Another institution has accepted the applicant through Adjustment.
UI to UF at Confirmation	An unconditional insurance offer becomes firm as a result of the applicant's conditional firm choice being rejected at Confirmation. That is, Decision is <i>U</i> , Reply is <i>F</i> , and the previous Reply value was <i>I</i> .
CI to CF at Confirmation	The applicant's CF choice is rejected during Confirmation and UCAS updates the applicant's existing CI choice to CF. That is, Decision is <i>C</i> , Reply is <i>F</i> , and the previous Reply value was <i>I</i> .

UCAS Enquiry

During the Clearing and Adjustment processes, the system uses the **UCAS Enquiry** group box values to create or update the Campus Solutions application records. The following table describes when the system uses the program action and the reason values for the UCAS Clearing and Adjustment decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Adjustment Acceptance	You import Adjustment applications (for which the institution has sent AD transactions) and the system updates the corresponding Campus Solutions application record.

Program Action and Action Reason Values For	Used by the System When
Clearing Application	You import Clearing applications and the system creates the corresponding Campus Solutions application records for the imported Clearing applications.
Clearing Acceptance	<p>You create a RX transaction (with Decision = A) and the system updates the corresponding Campus Solutions application record.</p> <p>You import an accepted Clearing application and the system creates a new Campus Solution application record for the accepted Clearing application (new application).</p> <p>You import an accepted Clearing decision (Result = A) and the system updates the Campus Solution application record with the result (existing application).</p>
Clearing Rejection	<p>You create a RX transaction (with Decision = R) and the system updates the corresponding Campus Solutions application record.</p> <p>You import a rejected Clearing decision (Result = R) and the system updates the Campus Solution application record with the result (existing application).</p>
Release to Clearing	You create a RR transaction to notify UCAS that the applicant is released into Clearing and the system updates the corresponding Campus Solutions application record.
RPA Applicant (record of prior acceptance applicant)	EAS in ivStarK is <i>R</i> , and the system updates the corresponding Campus Solutions application record.

Scenarios

The following scenarios show how Campus Solutions uses the values set up on the Confirmation page:

Scenario 1: Importing new Clearing applications (that is, application choice number 9 does not exist in the database)

- For Clearing Application, enter the program action *APPL* (Application) and action reason *CAP*. For Clearing Acceptance, enter the program action *ADMT* and action reason *CAC*. For Clearing rejection, enter the program action *DENY* and action reason *CR*.
- The Import Applicant Data Application Engine (SAD_UC_IMPAP) process imports UCAS Clearing application records from ivStarZ1. The imported UCAS Clearing application records have a choice number of 9.

3. If the Result value in ivStarZ1 is *null* for the Clearing application, the system creates a corresponding Campus Solutions application record with a program action of *APPL* and action reason of *CAP*.
4. If the Result value in ivStarZ1 is *A* for the Clearing application, the system creates a corresponding Campus Solutions application record with a program action of *ADMT* and action reason of *CAC*.
5. If the Result value in ivStarZ1 is *R* for the Clearing application, the system creates a corresponding Campus Solutions application record with a program action of *DENY* and action reason of *CR*.
6. For the new Clearing Campus Solutions application record that has a program action of *APPL*, you enter a decision *A*. After entering the decision you generate the RX transaction. In this case, the system updates the Campus Solutions application record with the program action of *ADMT* and action reason *CAC*.

Scenario 2: Confirming offers

1. For the Accept Firm decision enter a program action of *ADMT* and action reason of *COF*.
2. Click **Accept** on the UCAS Confirmation page for a UCAS application that has a conditional offer. If required, approve the acceptance of the admission offer.
3. Select the **Generate Transaction** check box on the Transaction Processing page and run the Transaction Processing process to generate a transaction for the Confirmation decision.
4. The system assigns the program action *ADMT* and action reason *COF* to the Campus Solutions application record for the corresponding UCAS application.

Scenario 3: Importing Adjustment Applications

1. For the Adjustment Acceptance decision, enter a program action of *ADMT* and action reason of *ADA*.
2. The Import Applicant Data process imports UCAS adjustment (choice number 6) records from ivStarC. For applications, which the institution has already sent AD transactions to UCAS, the incoming decision value is *U* and reply value is *F*.
3. If the incoming decision value is not *U*, the system creates a corresponding Campus Solutions application record with a program action of *APPL* and the action reason that you had set up on the UCAS Application Import page.
4. If the incoming decision value is *U* and reply is *F*, the system updates the corresponding Campus Solutions application record with a program action of *ADMT* and action reason of *ADA*.
5. If the incoming decision value is *U*, reply is *D*, and Adjustment is not *D*, the system updates the corresponding Campus Solutions application record with the program action and action reason values that you had set up for Unconditional Decline on the UCAS Program Actions page.
6. For the new Adjustment Campus Solutions application record that has a program action of *APPL*, the institution generates an AD transaction. In this case, the system updates the Campus Solutions application record with the program action of *ADMT* and action reason of *ADA*.

Scenario 4: An applicant has been accepted by another institution through Adjustment. Your institution previously sent an unconditional offer or a confirmation acceptance to UCAS that the applicant has firmly accepted (the applicant has an application choice with a decision reply value of UF).

1. For the Adjustment Decline decision, enter a program action of *DENY* and action reason of *ADD*.

2. The Import Applicant Data process imports UCAS choice records from ivStarC.
3. If the incoming Adjustment value is *D* for an application choice that exists in your database, the process updates the decision-reply value from *UF* to *UD*. Also, the system updates the corresponding Campus Solutions application record with a program action of *DENY* and action reason of *ADD*.

Scenario 5: Importing updated Clearing applications.

After a Decision has been made for a choice but before the applicant replies, any changes to course details, term or entry point made at UCAS can lead to the adding of a new row in the Campus Solutions application. Consequently, the earlier offer row generated by the LD/LA transaction is no longer the latest. In this scenario,

- If the incoming Result = A and the Reply is not D, add a new row for Clearing Acceptance.
- If the incoming Result = A and Reply is D and the Campus Solutions application is not already withdrawn (application status is not Cancelled from WADM or WAPP program action), add a new row for Unconditional Decline.
- If the incoming Result = R, add a new row for Clearing Rejection.

Setting Up UTT Program Action Reasons for Confirmation and Clearing Elsewhere

Access the UTT Confirmation page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UTT Confirmation**).

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

UTT Decision Approval
UCAS Program Actions
UTT Program Actions
UCAS Confirmation
UTT Confirmation

Academic Institution: PSGBR PeopleSoft University UK

UTT Confirmation Decisions

	Program Action	Action Reason
*Accept Firm:	ADMT Admit	ACCF Accept Firm
*Reject Firm:	DENY Deny	REJF Reject Firm
*Amended Confirmation:	APPL Application	ACNF Amended Confirmation
*Confirmation with Change:	ADMT Admit	CNFC Confirmation with Change
*Delayed Conditional:	APPL Application	DCON Delayed Conditional

UTT Confirmation Amendments

	Program Action	Action Reason
*Clearing Elsewhere:	WAPP Applicant Withdrawal	CLEL Clearing Elsewhere

UTT Enquiry

	Program Action	Action Reason
*Clearing Application:	APPL Application	CLAP Clearing Application
*Clearing Acceptance:	ADMT Admit	CLAC Clearing Acceptance
*Clearing Offer:	APPL Application	CLOF Clearing Offer
*RPA Applicant:	ADMT Admit	RPAA RPA Applicant

UTT Confirmation Decisions

When the system generates UTT Confirmation transactions, it uses the **UTT Confirmation Decisions** group box values to update the Campus Solution application records (related to the imported UTT application data). The following table describes when the system uses the program action and the reason values for the UTT Confirmation decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Accept Firm	The institution confirms acceptance for a conditional firm application (Decision is <i>A</i> and Reply is <i>F</i>). Also, the system uses this action in ivgStarG update processing when you change the Reply to <i>F</i> , the Decision is <i>U</i> , and previously the application was <i>CF</i> .
Reject Firm	The institution confirms rejection for a conditional firm application (Decision is <i>R</i> , and Reply is <i>F</i>).

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Amended Confirmation	You change a Confirmation decision and a new RD transaction is generated.
Confirmation with Change	You change Course, Campus, Modular, Part Time, Entry Year, or Entry Month as part of a Confirmation decision (Decision is C in an RD transaction).
Delayed Conditional	You delay the conditional offer. That is, Decision is D (Delayed Confirmation Decision) in an RD transaction.

UTT Confirmation Amendments

When you receive UTT Confirmation amendments, the system uses the **UTT Confirmation Amendments** group box values to update the Campus Solution application records (related to the imported UTT application data). The following table describes when the system uses the program action and the reason values for the UTT Confirmation amendments:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Clearing Elsewhere	An applicant was accepted through Clearing at another institution.

UTT Enquiry

When the system generates UTT Enquiry transactions, it uses the UTT Enquiry group box values to create or update the Campus Solution application records (related to the imported UTT application data). The following table describes when the system uses the program action and the reason values for the UTT Enquiry decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Clearing Application	You import Clearing applications and the system creates the corresponding Campus Solutions application records for the imported Clearing applications.
Clearing Acceptance	<p>You import an accepted Clearing application that has Decision = <i>U</i> (Unconditional Offer) or <i>A</i> and the system creates a new Campus Solution application record for the accepted Clearing application.</p> <p>You create a RX transaction (Decision is <i>U</i>) and the system updates the corresponding Campus Solutions application record.</p>

Program Action and Action Reason Values For	Used by the System When
Clearing Offer	<p>You import an accepted Clearing application that has Decision = <i>C</i> (Conditional Offer) and the system creates a new Campus Solution application record for the accepted Clearing application.</p> <p>You create a RX transaction (Decision is <i>C</i>) and the system updates the corresponding Campus Solutions application record.</p>
RPA Applicant	EAS in ivStarK is <i>R</i> , and the system updates the corresponding Campus Solutions application record.

Setting Up Outcomes for Enquiries and Notes

Access the Outcome Codes page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Outcome Codes**).

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

Outcome Codes

Academic Institution PSGBR PeopleSoft University UK

Outcome Code APPL1

*Long Description Applicant to provide transcript/certificates

*Short Description Applicant transcript/certs

*Action Required Applicant

☒ UCAS

☒ Apply

☒ Confirmation

☒ Active

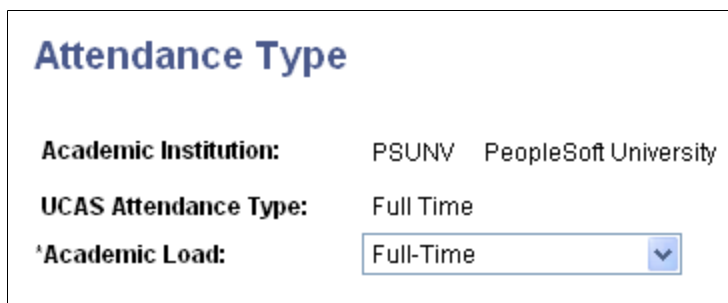
Field or Control	Description
Action Required	<p>Select a value that allows you to filter the outcome codes on the UCAS Confirmation Enquiries page, and UCAS and UTT Application Notes pages.</p> <p>Values are <i>Applicant</i>, <i>Institution</i>, and <i>None</i>.</p>

Field or Control	Description
UCAS	Select to have the outcome code available for selection on the UCAS Application Notes and UCAS Confirmation Enquiries pages.
Apply	Select to have the outcome code available for selection on the Apply Application Notes page.
Confirmation	Select to have the outcome code available for selection on the UCAS Confirmation Enquiries page.

Mapping UCAS Attendance Types

Access the Attendance Type page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Attendance Type**).

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



Attendance Type

Academic Institution: PSUNV PeopleSoft University

UCAS Attendance Type: Full Time

***Academic Load:** Full-Time ▼

Map the UCAS attendance types to Campus Solutions academic load values.

Note: The attendance type mapping is used to set the Approved Academic Load value when External Education records are created from records imported from ivEducation and ivgEducation.

Mapping UCAS, UTT, and Apply Entry Years and Months

Access the Entry Year page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Entry Year**).

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

Entry Year

Academic Institution PSGBR PeopleSoft University UK

System Apply

Academic Career UGRD Undergraduate

Admit Term 2200 2020-21 Academic Year

Entry Year and Month Personalize | Find | First 1 of 1 Last

*Entry Year	Entry Month	Cohort Tag	Description
1 2200	1		

Use this page to map the admit term for UCAS, UTT, and Apply choices.

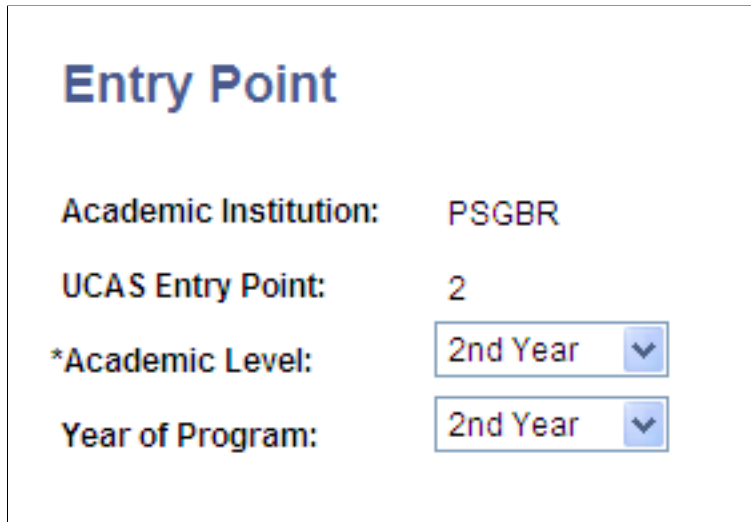
Field or Control	Description
Entry Year	Enter the entry year in the format YYYY.
Entry Month	<p>Enter a number between 1 and 12 to indicate the UCAS entry month. For example, if the month is January, enter <i>1</i>.</p> <p>For non-modular UTT applications, enter <i>0</i>. UTT does not deliver an entry month value for non-modular UTT applications. If any incoming application does not have an entry month, the import process uses the mapping with 0 as the default.</p> <p>For Apply applications, this field defaults to zero. If there's a value in Entry Month on the Apply Course page, then that value is used here.</p>
Entry Point	<p>(Optional) Set the year of program the applicant can join. When you set a value in this field, you can define multiple records for different Entry Points, and define different Cohort Tags for each Entry Point. If you leave this field blank, you can continue to have a single mapping of Entry Year and Month to Admit Term and a single Cohort Tag that will apply to all Entry Points.</p> <hr/> <p>Note: This field is hidden if System is set to UTT or Apply.</p>
Cohort Tag	<p>Use this field if you are using the Program Enrollment functionality and you want the Import Applicant Data process to set this cohort value when it creates or updates Campus Solutions applications as part of the UCAS and UTT or Apply application import.</p> <p>For information about Program Enrollment, refer to the Student Records - Program Enrollment documentation.</p> <p>See "Understanding Program Enrollment" (Student Records)</p>

Note: When you import application data, the system uses the mapped admit term to create or update the related Campus Solutions application records.
It is recommended that you define entry year mappings for a single career for each combination of institution and system.

Mapping UCAS Entry Points

Access the Entry Point page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Entry Point**).

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



The screenshot shows a web form titled "Entry Point". It contains four fields with labels and values:

- Academic Institution:** PSGBR
- UCAS Entry Point:** 2
- *Academic Level:** 2nd Year (with a dropdown arrow)
- Year of Program:** 2nd Year (with a dropdown arrow)

Note: When you import UCAS application data, the system uses the mapped academic level and year of program to create the related Campus Solutions application records. If the year of program is not mapped, then the system sets the value in Application Program Data page to 00 (not set).

UCAS admission entry points range from 0 for foundation year and 1 through 5 for first through fifth year entry. Entry point is not used in UTT admissions. Therefore, for UTT you need not map entry points with academic levels and careers. The system uses the default academic level that you defined on the UTT/Apply Import page for UTT and Apply applications.

Mapping UCAS Housing Interest

Access the Home page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Home**).

Values for the Housing Interest field are delivered with your system as translate values. Values are *Commuter*, *Off Campus Housing*, and *On Campus Housing*.

Note: When you import UCAS application data, the system populates the mapped Campus Solutions housing interest into the related Campus Solutions application records.

Mapping UCAS Titles

Access the Title page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Title**).

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



The screenshot shows a web form titled "Title". It contains the following fields and controls:

- Academic Institution:** A text field with the value "PSGBR PeopleSoft University UK".
- UCAS Title:** A text field with the value "Dame".
- *Name Prefix:** A dropdown menu with the value "Ms" selected.

Name Prefix values are defined here: **Set Up Common Objects > Foundation Tables > Personal > Name Prefix**.

Note: When you import UCAS application choices, the system populates the mapped name prefixes into the related Campus Solutions name records.

If a UCAS Title value is not mapped to a name prefix, then the system uses the UCAS Title value as the prefix in the name record.

Defining External Systems

Access the External System page (**Set Up SACR > Product Related > Campus Community > Define Campus Community > Set Up > Define External Systems**).

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

External System

External System: ULN

External System			
		Find View All	First 1 of 1 Last
*Effective Date:	01/01/1900	*Status:	Active
*Description:	Unique Learner Number (ULN)		
Short Description:	ULN		
Person / Organization <input type="checkbox"/> Organizations <input checked="" type="checkbox"/> Persons			

Define the following external systems codes listed in the following table.

<i>External System Code</i>	<i>Description</i>
GT	UTT Personal ID (UTTPERID)
ISA	Ind Safeguarding Auth (ISA)
NIN	National Insurance No (NIN)
SCN	Scottish Candidate Number (SCN)
UC	UCAS Personal ID (UCASPERID)
ULN	Unique Learner No (ULN)
AP	Apply Candidate ID (AP)

You must define the codes as shown in the table but you can modify the description.

The system uses this setup to track applicant IDs imported from UCAS and Apply. To view the imported IDs for an applicant, use the External System page (Campus Community, Personal Information, Identification, External System ID).

Setting Up UCAS and Apply User Defaults

Access the UCAS, Apply Defaults page (**Set Up SACR > User Defaults > UCAS, UTT Defaults**).

This example illustrates the fields and controls on the UCAS, Apply Defaults page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'UCAS, Apply Defaults' page. At the top, there are tabs: 'User Defaults 4', 'Enrollment Override Defaults', 'Communication Speed Keys', 'User 3C Groups Summary', and 'UCAS, Apply Defaults'. Below the tabs, the user information is shown: 'User ID PS' and 'Name Locherty, Betty'. The main content area is titled 'Institution Defaults' and includes a 'Find | View All' link and pagination 'First 1 of 1 Last'. The 'Academic Institution' field is at the top. Below it, the 'UCAS Defaults' section contains fields for 'UCAS Course', 'UCAS Campus', 'UCAS Entry Year', 'Decision Maker', 'Approver', 'Decision' (a dropdown menu), and 'Offer'. The 'Apply Defaults' section follows, with fields for 'Provider Code', 'Apply Course', 'Entry Year', and 'Decision Maker'. Finally, the 'UTT Defaults' section contains fields for 'UTT Course', 'UTT Campus', 'UTT Entry Year', 'UTT Decision Maker', 'Approver', 'Decision' (a dropdown menu), and 'Offer'. Each field has a search icon to its right.

The system uses the defaults that you set up here to populate data in the UCAS, Apply Applications, and Apply Decisions pages. The default values that you set up here can be overridden on any page in the system.

Although setting user defaults can save time and minimize data entry errors, doing so is optional.

To set up user defaults for the **Academic Institution**, **Term**, **Career**, and **Academic Program** fields, select **Set Up SACR > User Defaults > User Defaults 1**.

To set up user defaults for the **Application Center** field, select **Set Up SACR > User Defaults > User Defaults 2**.

If your institution does not have PeopleSoft HCM (HRMS) installed, the Decision Maker and Approver lookups do not have access to the database table that differentiates staff members from the other person records (such as students). Therefore, if HCM is not installed, the lookups will display all person records.

The same logic applies to other pages where Decision Maker or Approver lookups exist (for instance, the UCAS Decision Processing page).

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, you should read the additional documentation to understand the setup, functional, and technical implementation considerations.

See:

"Integrating Person Data" (Campus Solutions Application Fundamentals)

"Integrating Setup Data" (Campus Solutions Application Fundamentals)

"Monitoring Integrations Using the Integrity Utility" (Campus Solutions Application Fundamentals)

See *Campus Solutions to Human Capital Management Integration* in My Oracle Support (ID 1553319.1).

















Setting Up National ID Types for Country Code GBR

Access the National ID Type Table page (**Set Up Common Objects > Foundation Tables > Personal > National ID Type**).

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

National ID Type Table

Country: GBR United Kingdom

National ID Types							Personalize Find View All  		First 	1-6 of 6	Last 
*NID Type	Default	*Description	Short Desc	National ID Format	NID as stored						
GTTRID	<input type="checkbox"/>	UTT Personal ID	UTTPERID	9999999999	9999999999						
PR	<input type="checkbox"/>	National Insurance Number	NINO	AA999999	AA999999						
PR_9	<input checked="" type="checkbox"/>	Nat Ins Num (9 Chars)	NINO	AA999999A	AA999999A						
TEMP	<input type="checkbox"/>	Temp National Insurance Num	NINO	AA999999	AA999999						
TEMP_9	<input type="checkbox"/>	Temp NI Number (9 Chars)	NINO	AA999999A	AA999999A						
UCASID	<input type="checkbox"/>	UCAS Personal ID	UCASPER	9999999999	9999999999						

NID Type (maximum 6 characters)	Default	Description (maximum 30 characters)	Short Desc (maximum 10 characters)	National ID Format (maximum 20 characters)
UCASID	No	UCAS Personal ID	UCASPERID	9999999999 (10 digits)
GTTRID	No	UTT Personal ID	UTTPERID	9999999999 (10 digits)
APPLID	No	Apply Candidate ID	APPLID	XXXXXXXXXX (10 characters)

The Import Applicant Data process uses the UCASID, GTTRID, and APPLID NID types to import UCAS, UTT, and Apply applications.

Setting Up Elements for Teacher Training Applications

This section describes:

- [Defining Individual Conditions for Applications](#)
- [Defining Condition Groups](#)
- [Creating or Reviewing Application Statuses for Apply Applications](#)
- [Defining Reasons for Rejection](#)
- [Reviewing and Mapping Apply Courses](#)

Note: For teacher training applications, the conditions are relevant only to offers. There's no requirement to define conditions or offers for a particular decision code as there are for UTT applications.

Pages Used to Set Up Teacher Training Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Apply Conditions	SAD_UC_APPLY_COND	Set Up SACR >Product Related >Recruiting and Admissions >UCAS >Apply Setup >Apply Conditions	Define individual conditions you can apply to applications.
Apply Offers	SAD_UC_APPLY_OFFER	Set Up SACR >Product Related >Recruiting and Admissions >UCAS >Apply Setup >Apply Offers	Define groups of conditions you can apply to applications.
Apply Application Status	SAD_U_APPLSTAT_PG	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Apply Application Status	Create or review application statuses that you can apply to Apply applications. You can change the descriptions for the delivered statuses to reflect your institution's admissions terminology.
Rejection Reasons	SAD_UC_APPLY_REJN	Set Up SACR >Product Related >Recruiting and Admissions >UCAS >Apply Setup >Rejection Reasons	Define the text for rejecting applications.

Page Name	Definition Name	Navigation	Usage
Apply Course	SAD_UC_ACOURSE_PG	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Apply Course	Manually add Apply course data to your database. Also, map a course with a Campus Solutions academic career, program, plan, application center, and campus.
Gender Mapping	SAD_UC_GENDR_PG	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Gender Mapping	Map HESA gender codes to sex codes in person records.
Residency Mapping	SAD_UC_RESID_PG	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Residency Mapping	<p>(Optional) Map UK residency status to residency codes to create official residency records for applicants. If you don't map the residency status, then official residency records aren't created.</p> <hr/> <p>Note: The Residential Category for UCAS and UTT isn't used for Apply applications.</p> <hr/>

Defining Individual Conditions for Applications

Access the Apply Conditions page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Apply Conditions**).

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

Apply Conditions

Academic Institution PSGBR PeopleSoft University UK

Condition Code TESTCOND01

Details
[Find](#) | [View All](#)
First 1 of 1 Last

*Effective Date

*Status

*Condition Text

Used in Offers
[Personalize](#) | [Find](#) | [View All](#) First 1 of 1 Last

Offer Code	Description	Status
1 NEWTEST	New Test Offer	Active

Used in Courses
[Personalize](#) | [Find](#) | [View All](#) First 1-2 of 2 Last

Provider Code	Course Code	Site Code	Study Mode	Cycle
1 D39	X110	-	full_time	2021
2 D39	X171	-	full_time	2020

Use this page to define standard conditions that are applicable to any application and available for all courses, unless you define course-specific conditions on the Apply Course page. You can also apply these conditions to the offers you define on the Apply Offers page. See [Reviewing and Mapping Apply Courses](#).

To create a condition, click **Add New Value**, then provide values for:

Field or Control	Description
Academic Institution	Enter your institution. By default, this value is set to the user's default institution.
Condition Code	Enter a code for the condition. You can enter a maximum of 10 characters.

Details

You can add multiple rows, each row is identified by the effective date. When you add a new row, the Condition Text is copied from the most-recent row.

Only if a condition is used, you see the list of offers or courses that use the condition. You can delete a condition only if it isn't used in any offer or course.

Used in Offers

This region shows the offers that use the condition. If the condition isn't being used in the most recent effective-dated row for the offer, the offer doesn't appear even if the condition was used for an earlier row.

Used in Courses

This region shows the courses that use the condition.

Field or Control	Description
Cycle	<p>The value here is the most recent course record that's being considered.</p> <p>If the condition isn't used in the most recent cycle for the course, the course isn't listed on the table even if the condition was used for an earlier cycle.</p>

Defining Condition Groups

Access the Apply Offers page (**Set Up SACR >Product Related >Recruiting and Admissions >UCAS >Apply Setup >Apply Offers**).

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

Apply Offers

Academic Institution PSGBR PeopleSoft University UK
Offer Code STANDARDOF

Details Find | View All First 1 of 1 Last

*Effective Date 01/01/2020
*Status Active
*Description Standard Apply Offer
☒ Default

Conditions Personalize | Find | View All First 1-2 of 2 Last

*Condition Code	Condition Text
1 DBSCHECK	Disclosure and Barring Service (DBC) check
2 FITTCHECK	Fitness to Teach check

Used in Courses Personalize | Find | View All First 1-3 of 3 Last

Provider Code	Course Code	Site Code	Study Mode	Cycle	Default
1 D39	37N3	-	full_time	2020	<input checked="" type="checkbox"/>
2 D39	X110	-	full_time	2021	<input checked="" type="checkbox"/>
3 D39	X171	-	full_time	2020	<input type="checkbox"/>

Use this page to create a group of conditions and define them as offers. Offers are applicable to any application, and are available for all courses unless course-specific offers are defined in Apply Course mapping.

To create a group of conditions, click **Add New Value**, then provide values for:

Field or Control	Description
Academic Institution	Enter your institution. By default, this value is set to the user's default institution.
Offer Code	Enter a code for the offer. You can enter a maximum of 10 characters.

You can delete an offer and its associated conditions if the offer isn't used in Apply Course.

Details

You can add multiple rows of conditions, and each row is identified by the effective date. When you add a new row, the effective date defaults to the current date, the rest of the values are copied from the most recent row.

Field or Control	Description
Description	Enter a description for the offer. The maximum length is 30 characters.

Field or Control	Description
Default	<p>By default, this is not selected. Only one record can be set as the default offer.</p> <p>You can select this check box only if no other offer is set as the default.</p>

Conditions

Add the conditions you want to use for the offer. You must add at least one condition to save the record. If you have added these conditions on the Apply Conditions page, you can add them as part of a default offer:

- Fitness to Teach check
- Disclosure and Barring Service (DBS) check

Used in Courses

Here you see the list of courses that use this offer as the Default Offer or in Available Offers for the most recent cycle row.

Field or Control	Description
Cycle	<p>The value here is the most recent course record that's being considered.</p> <p>If the condition isn't used in the most recent cycle for the course, the course isn't listed on the table even if the condition was used for an earlier cycle.</p>
Default	This check box appears as selected if the offer is set as the default for the course.

Creating or Reviewing Application Statuses for Apply Applications

Access the Apply Application Status page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Apply Application Status**).

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

Apply Application Status

Application Status offer

Apply Application Status

Find | View All

First 1 of 1 Last

*Effective Date

01/01/1900

*Status

Active

*Description

Offer

Available Decision

Personalize | Find |

First 1-3 of 3 Last

*Existing Status

1

awaiting_provider_decision

2

offer

3

rejected

Use this page to add or view statuses for Apply applications. You assign these statuses as decisions in applications.

Available Decisions

Use this region to identify whether a status is valid as a decision for an application.

Field or Control	Description
Existing Status	<p>These represent the current status an application may have. If an application has this value as its status, then you can assign the corresponding application status as a decision on the Apply Decisions page.</p> <p>In the example screenshot, you can assign the decision <i>Offer</i> on the Apply Decisions page for applications whose existing status is any one of these: <i>New (awaiting_provider_decision)</i>, <i>Offer (offer)</i>, or <i>Rejected (rejected)</i>.</p>

These records are delivered with the system. You can update these depending on the options that the Department for Education allows. For example, if an offer can be rescinded after a candidate accepts the offer, you can add a new row for “Rejected” for applications with an existing status “pending_conditions.”

Application Status corresponds to a decision that you can assign to an application. **Existing Status** refers to an application’s current state in the application process.

<i>Application Status</i>	<i>Existing Status</i>
Offer	<ul style="list-style-type: none"> • New (awaiting_provider_decision) • Offer (offer) • Rejected (rejected)
Rejected	<ul style="list-style-type: none"> • New (awaiting_provider_decision) • Offer (offer)
Conditions met (recruited)	Accepted (pending_conditions)
Conditions not met	Accepted (pending_conditions)

Related Links

[Entering or Updating a Decision for Apply Applications](#)

Defining Reasons for Rejection

Access the Rejection Reasons page (**Set Up SACR >Product Related >Recruiting and Admissions >UCAS >Apply Setup >Rejection Reasons**).

Use this page to create the text for rejecting an application. The text you define here is used to populate the reason rejection field in a decision record.

You can delete rejection reasons because the code is not stored in decision records.

To create a reason for rejection, click **Add New Value**, then provide values for:

<i>Field or Control</i>	<i>Description</i>
Academic Institution	Enter your institution. By default, this value is set to the user's default institution.
Rejection Code	Enter a code for the rejection. You can enter a maximum of 10 characters.

Details

You can add multiple rows of reasons, and each row is identified by the effective date. When you add a new row, the effective date defaults to the current date, the status defaults to Active, the rejection text is copied from the most recent row.

Reviewing and Mapping Apply Courses

Access the Apply Course page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Apply Course**).

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

Apply Course

Academic Institution PSGBR PeopleSoft University UK
 Provider Code 1L7 The Long Eaton School
 Course Code 29LW
 Site Code -
 Study Mode full_time

Details

Find | View All First 1 of 1 Last

*Cycle 2020 + -

*Course Name Mathematics - PGCE with QTS full time

Entry Year

Entry Month 0

Mapping

*Academic Career Postgraduate

*Academic Program PGCEH PG Cert Education (Humanities)

*Academic Plan EGEOG Geography

Campus

Application Center

Academic Load

Cohort Tag

Year of Program 01 - First Year

Default Offer

Available Offers

Personalize | Find | First 1 of 1 Last

Offer Code	Description		
1		+ -	

Available Conditions

Personalize | Find | First 1 of 1 Last

Condition Code	Condition Text		
1		+ -	

Use this page to add Apply course records with different cycles. Records with the most recent cycle appear first.

Take note of these fields:

Field or Control	Description
Site Code	Enter a short hyphen if the course is offered in only one location and there's no site code.
Study Mode	Enter <i>full_time</i> or <i>part_time</i> .

Details

You can add multiple records (rows) for different cycles. The records appear in descending order, that is, the most recent cycle record appears first.

When you add a new record, all the values from the previous record (including the mapping fields) are copied to the new record except for Cycle and Entry Year, which are blank.

Field or Control	Description
Cycle	<p>This field requires exactly four digits.</p> <p>This represents the Recruitment Cycle Year for Apply applications.</p>
Entry Year	<p>(Optional) If you:</p> <ul style="list-style-type: none"> Enter a value, that is used to populate the Entry Year field on the choice record, which is then used with Entry Month to map the appropriate Admit Term for the CS application. If you don't enter a value, the Entry Year for choices is derived from <code>recruitment_cycle_year</code>.
Entry Month	The value defaults to zero and can be set to an alternative value for use in mapping to Admit Term. For example, for applications for the 2021 cycle with a start date of February 2022, the Entry Year can be set to 2022 and the Entry Month to 2 and those values mapped to a different Admit Term value than the Admit Term used for September 2021 starts if required.
Default Offer	Select a default offer from a list of active Apply Offers.

Mapping

You must map a Campus Solutions academic career, program, and plan for each combination of Apply course code, entry year and entry month that may exist in an imported application choice. The remaining

fields are optional. The system uses the mapped values when creating or updating the Campus Solutions application record related to an Apply application choice.

If you do not map the Application Center and Campus values, the system uses the default values defined on the UTT/Apply Import page.

Field or Control	Description
Academic Load	If you don't enter a value, then it's derived from the Study Mode of the choice.
Cohort Tag	If you don't enter a value, then it's derived from the Entry Year page if it's defined there.
Year of Program	If you don't enter a value, then it's set to 01 – First Year.

Available Offers

If you define offers here, this limits the available offers for applications for the course. Otherwise, all active offers are available.

When you add a new row for a new cycle, all the existing values are copied to the new record and can be edited.

Available Conditions

If you define conditions here, this limits the available conditions for applications for the course. Otherwise, all active conditions are available.

When you add a new row for a new cycle, all the existing values are copied to the new record and can be edited.

Processing UCAS and UTT Reference Data

This section provides an overview of reference data processing and discusses how to:

- Import reference data.
- Review and map UCAS courses.
- Review and map UTT courses.
- Review and map area of permanent residence.
- Review and map disability data.
- Review and map ethnicity data.
- Review and map residential category data.

- Review and map country data.
- Review and map nationality data.
- Review exam level data.

Understanding UCAS and UTT Reference Data Processing

You must process reference data before importing applications. To process reference data, first run the Import Reference Data Application Engine (SAD_UC_IMREF) process to import the reference data. Then, use the Reference Data pages to view the imported reference data in the Campus Solutions tables.

Note: For Apply applications, reference data isn't imported.

If you selected the **Import Live** check box on the UCAS Configuration page, the system loads the data from UCAS into the staging tables and then into the Campus Solutions tables.

If you did not select the **Import Live** check box, the system loads the data from the staging tables into the Campus Solutions tables. The following table lists the staging tables that store the reference data:

<i>Staging Table</i>	<i>Stores Data Imported From</i>
PS_SAD_UC_I_SCHCTX	cvRefSchoolContextualData
PS_SAD_UC_I_INST	cvInstitution
PS_SAD_UC_I_REGION	cvnRefRegion
PS_SAD_UC_I_CVCOURSE	cvCourse
PS_SAD_UC_I_CVGCOURSE	cvgCourse
PS_SAD_UC_I_KEYWORD	cvRefKeyword
PS_SAD_UC_I_SCHOOL	cvSchool
PS_SAD_UC_I_SCHOOLCONT	cvSchoolContact
PS_SAD_UC_I_SCHOOLTYPE	cvRefSchoolType
PS_SAD_UC_I_ESTGROUP	cvRefEstGroup
PS_SAD_UC_I_APR	cvRefAPR
PS_SAD_UC_I_DIS	cvRefDis

Staging Table	Stores Data Imported From
PS_SAD_UC_I_ETHNIC	cvRefEthnic
PS_SAD_UC_I_RESCAT	cvRefResCat
PS_SAD_UC_I_COUNTRY	cvRefCountry
PS_SAD_UC_I_NATIONLTY	cvRefNationality
PS_SAD_UC_I_POCC	cvRefPOCC
PS_SAD_UC_I_SOCCLASS	cvRefSocialClass
PS_SAD_UC_I_SOCIOECON	cvRefSocioEconomic
PS_SAD_UC_I_CARE	cvRefCare
PS_SAD_UC_I_SPONSOR	cvRefPrepSponsor
PS_SAD_UC_I_SCHOOLYEAR	cvRefSchoolYear
PS_SAD_UC_I_PARENTHE	cvRefParentinHE
PS_SAD_UC_I_FEE	cvRefFee
PS_SAD_UC_I_EBLSUBJ	cvEBLSubject
PS_SAD_UC_I_AWARDBODY	cvRefAwardBody
PS_SAD_UC_I_EXAM	cvRefExam
PS_SAD_UC_I_SUBJ	cvRefSubj
PS_SAD_UC_I_UNITS	cvRefUnits
PS_SAD_UC_I_OEQ	cvRefOEQ
PS_SAD_UC_I_DEGRSUBJ	cvgRefDegreeSubject
PS_SAD_UC_I_GDTYPE	cvgRefHighestExpectedQualType

Staging Table	Stores Data Imported From
PS_SAD_UC_I_OFFABBR	cvRefOfferAbbrev
PS_SAD_UC_I_UVOFFABBR	uvOfferAbbrev
PS_SAD_UC_I_STATUS	cvRefStatus
PS_SAD_UC_I_OFFERSUBJ	cvRefOfferSubj
PS_SAD_UC_I_ERROR	cvRefError
PS_SAD_UC_I_CVAMEND	cvRefAmendments
PS_SAD_UC_I_POCC10	cvRefPOCC2010
PS_SAD_UC_I_CVGAMEND	cvgRefAmendments
PS_SAD_UC_I_CAREDUR	cvRefCareDuration
PS_SAD_UC_I_TARIFF	cvRefTariff
PS_SAD_UC_I_LEA	cvRefLea
PS_SAD_UC_I_GENIDE	cvRefGenIdenDiff
PS_SAD_UC_I_SEXORT	cvRefSexOrientation
PS_SAD_UC_I_RELBLF	cvRefReligionBelief

If you selected both the **UTT** and **UCAS** check boxes on the UCAS Configuration page, the system loads both the UCAS and UTT reference data.

The system imports cvRefSchoolContextualData data only if you have selected the Contextual Data check box and the UCAS Cycle is *2012* or greater on the UCAS Configuration page.

After loading the reference data, you need to use the Reference Data pages to map the UCAS values to the Campus Solutions values. For example, you must map the UCAS courses to the Campus Solutions careers, programs, and plans. Additionally, you can use the Reference Data pages to review whether the Import Reference Data process imported all the required data.

For information about the fields on the Reference Data pages that display the imported data, refer to the ODBC-link Technical Manual.

All the Reference Data pages have **Active** and **Imported** check boxes. Clear the **Active** check box to deactivate a manually added reference data record.

The system enables the **Active** check box for records that you entered manually through the Reference Data pages. However, the system disables the **Active** check box for imported records. The exception to this rule is the Institution Offer Abbreviation page on which the Active check box is enabled for both imported and non-imported records.

The **Imported** check box indicates whether you imported or manually added the reference data. If you manually add the data on a Reference Data page, then the system clears the **Imported** check box.

For cvName/cvNameU and cvgName/cvgNameU, the system does not import the data into Campus Solutions. Therefore, staging tables do not exist for these views. The Personal ID look up icon directly queries these views to display the applicant values on the UCAS and UTT Enquiry Entry pages. If the Unicode check box is selected on the UCAS Configuration page, then the lookup queries the NameU version of the view.

If the configured cycle is:

- 2015 or greater on the UCAS Configuration page, the Import Reference Data process imports the cvRefPOCC2010 view based on the date/time column POCCDate2010 of cvRefAmendments. POCCDate2010 indicates the date/time of the last changes to the cvRefPOCC2010 view.
- 2022 or greater, the Import Reference Data process imports the cvRefPOCC2020 view based on the date/time column POCCDate2020 of cvRefAmendments. POCCDate2020 indicates the date/time of the last changes to the cvRefPOCC2020 view.

From 2015 cycle onwards, the process doesn't import cvRefSocialClass. And from 2022 cycle onwards, the process doesn't import cvRefPOCC.

The Import Reference Data process imports records for the local institution code (that you define on the UCAS Configuration page) from cvgCourse. In order to also import the course records of associated institutions for Schools Direct applications, you must select the Accredited Institution check box for the institution on the Institution page (**Set Up SACR >Product Related >Recruiting and Admissions >UCAS >Reference Data >Institution**) and the Override Timestamp value for the cvgCourse view must be set back to ensure that all the required records are imported the next time Import Reference Data process is run. The Override Timestamp value is set on the Internal Timestamp page. For more information, see [Defining a Timestamp for Re-importing Data](#)

Pages Used to Process UCAS and UTT Reference Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import Reference Data	SAD_UC_IMP_REF_PRC	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Import Reference Data	Import UCAS reference data into your database.

Page Name	Definition Name	Navigation	Usage
UCAS Courses	SAD_UC_COURSE	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > UCAS Course	View the imported cvCourse data or manually enter the UCAS course data into your database. Also, map a UCAS course with a Campus Solutions academic career, program, plan, subplan, application center, and campus.
Area of Permanent Residence	SAD_UC_APR	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Area of Permanent Residence	View the imported cvRefAPR domicile data or manually enter the APR data into your database. Also, map the UCAS domicile to the Campus Solutions country code.
Country	SAD_UC_CNTRY	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Country	View the imported cvRefCountry data or manually enter the UCAS country data into your database. Also, map the UCAS country code to the Campus Solutions country code.
Disability	SAD_UC_DIS	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Disability	View the imported cvRefDis data or manually enter the UCAS disability data into your database. Also, map the UCAS disability code to the Campus Solutions disability code and type of impairment.
Ethnic	SAD_UC_ETHNIC	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Ethnic	View the imported cvRefEthnic data or manually enter the UCAS ethnic data into your database. Also, map the UCAS ethnicity code to the Campus Solutions set ID, regulatory region, and ethnicity group.
Nationality	SAD_UC_NATION	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Nationality	View the imported cvRefNationality data or manually enter the UCAS nationality data into your database. Also, map the UCAS nationality code to the Campus Solutions country and citizenship codes.

Page Name	Definition Name	Navigation	Usage
Residential Category	SAD_UC_RESCAT	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Residential Category	View the imported cvRefResCat data or manually enter the UCAS residential category data into your database. Also, map the UCAS residential category code to the Campus Solutions residency code.
Exam Levels	SAD_UC_EXAM	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Exam Levels	View the imported cvRefExam data or manually enter the UCAS exam level data into your database. Also, map the UCAS exam level to the Campus Solutions qualification type.
EBL Subject	SAD_UC_EBLSUB	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > EBL Subject	View the imported cvEBLSubject data or manually enter the UCAS EBL Subject data into your database.
Institution	SAD_UC_INST	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Institution	View the imported cvInstitution data or manually enter the UCAS institution data into your database. For UTT and Apply, indicate schools for which you are the accredited provider.
NHS Region	SAD_UC_REGION	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > NHS Region	View the imported cvnRefRegion data or manually enter the NHS Region data into your database.
Awarding Body	SAD_UC_AWDBDY	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Awarding Body	View the imported cvRefAwardBody data or manually enter the UCAS awarding body data into your database.
In Care	SAD_UC_CARE	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > In Care	View the imported cvRefCare data or manually enter the UCAS In Care data into your database.

Page Name	Definition Name	Navigation	Usage
In Care Duration	SAD_UC_CAREDUR	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > In Care Duration	View the imported cvRefCareDuration data or manually enter the UCAS In Care Duration data into your database.
Error Code	SAD_UC_ERROR	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Error Code	View the imported cvRefError data or manually enter the UCAS Error Code data into your database.
Establishment Group	SAD_UC_ESTGRP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Establishment Group	View the imported cvRefEstGroup data or manually enter the UCAS establishment group data into your database.
Fee Payer	SAD_UC_FEE	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Fee Payer	View the imported cvRefFee data or manually enter the UCAS fee payer data into your database.
Keyword	SAD_UC_KEY	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Keyword	View the imported cvRefKeyword data or manually enter the UCAS keyword data into your database.
LEA	SAD_UC_LEA	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > LEA	View the imported cvRefLea data or manually enter the LEA codes into your database.
Other Exam Qualifications	SAD_UC_OEQ	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Other Exam Qualifications	View the imported cvRefOEQ data or manually enter the UCAS Other Exam Qualifications data into your database.
Offer Abbreviation	SAD_UC_COFABB	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Offer Abbreviation	View the imported cvRefOfferAbbrev data.
Offer Subject	SAD_UC_OFFSUB	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Offer Subject	View the imported cvRefOfferSubj data or manually enter the UCAS Offer Subject data into your database.

Page Name	Definition Name	Navigation	Usage
Parent in Higher Education	SAD_UC_PARHE	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Parent in Higher Education	View the imported cvRefParentinHE data or manually enter the UCAS Parent in Higher Education data into your database.
Parental Occupation	SAD_UC_POCC	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Parental Occupation	View the imported cvRefPOCC data or manually enter the UCAS Parental Occupation data into your database.
Parental Occupation 2010	SAD_UC_POCC2010	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Parental Occupation 2010	View the imported cvRefPOCC2010 data or manually enter the UCAS Parental Occupation 2010 data into your database.
Parental Occupation 2020	SAD_UC_POCC2020	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Parental Occupation 2020	View the imported cvRefPOCC2020 data or manually enter the UCAS Parental Occupation 2020 data into your database.
Sponsor	SAD_UC_PRESPN	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Sponsor	View the imported cvRefPrepSponsor data or manually enter the UCAS sponsor data into your database.
School	SAD_UC_SCHOOL	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > School	View the imported cvSchool and cvSchoolContact data. Click the External Org Details link to update or view the details of the External Organization that is mapped to the school.
School Contextual Data	SAD_UC_SCH_CTXT	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > School Contextual Data	View the imported cvRefSchoolContextualData data or manually enter the School Contextual data into your database.
School Type	SAD_UC_SCHTYP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > School Type	View the imported cvRefSchoolType data or manually enter the UCAS school type data into your database.

Page Name	Definition Name	Navigation	Usage
School Year	SAD_UC_SCHYR	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > School Year	View the imported cvRefSchoolYear data or manually enter the UCAS school year data into your database.
Social Class	SAD_UC_SOCCLS	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Social Class	View the imported cvRefSocialClass data or manually enter the UCAS social class data into your database.
Socio Economic	SAD_UC_SOCECO	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Socio Economic	View the imported cvRefSocioEconomic data or manually enter the UCAS Socio Economic data into your database.
Status	SAD_UC_STATUS	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Status	View the imported cvRefStatus data or manually enter the UCAS status data into your database.
Subject	SAD_UC_SUB	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Subject	View the imported cvRefSubj data or manually enter the UCAS subject data into your database.
Units	SAD_UC_UNITS	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Units	View the imported cvRefUnits data or manually enter the UCAS unit data into your database.
Institution Course Keyword	SAD_UC_CRSKEY	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Institution Course Keyword	View the imported uvCourseKeyword data or manually enter the UCAS Institution Course Keyword data into your database. If required, update or add keywords that users can use to search for the course in the UCAS course web search utility.
Institution Offer Abbreviation	SAD_UC_UOFABB	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Institution Offer Abbreviation	View the imported uvOfferAbbrev data or manually enter the UCAS Institution Offer Abbreviation data into your database.

Page Name	Definition Name	Navigation	Usage
Tariff Scores	SAD_UC_TARIFF	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Tariff Scores	View the imported cvRefTariff data or manually enter the UCAS tariff data into your database.
UTT Course	SAD_UC_GCOURSE	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mapping > UTT Course	View the imported cvgCourse data or manually enter UTT course data into your database. Also, map a UTT course with a Campus Solutions academic career, program, plan, sub-plan, application center, and campus.
UTT Degree Subject	SAD_UC_GDSUB	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > UTT Degree Subject Table	View the imported cvgRefDegreeSubject data or manually enter the UTT degree subject data into your database.
UTT Qualification Type	SAD_UC_GDTYPE	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > UTT Qualification Type	View the imported cvgRefHighest ExpectedQualType data or manually enter the UTT qualification type data into your database.
Regional	EXT_ORG_TBL_REG	Campus Community > Organization > Create/ Maintain Organizations > Organization Table > Regional	View the imported cvSchool data or manually enter the UCAS school data into your database. The system enables the UK UCAS School Data region only if you select the HESA, UCAS check box on the SA Features page.
Gender Identity Difference	SAD_UC_GENDIDEN	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Gender Identity Difference	View the imported cvRefGenIdenDiff data or manually enter the gender identity difference data into your database.
Religion/Belief	SAD_UC_RELBLF	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Religion/ Belief	View the imported cvRefReligionBelief data or manually enter the religion or belief data into your database.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Sexual Orientation	SAD_UC_SEXORT	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Reference Data > Sexual Orientation	View the imported cvRefSexOrientation data or manually enter the sexual orientation data into your database.

Importing Reference Data

Access the Import Reference Data page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Import Reference Data**).

The Import Reference Data process imports reference data based on UCAS timestamps. After the process runs, you can view the latest timestamp information on the Internal Timestamp page.

For more information about the Internal Timestamp page, see [Defining a Timestamp for Re-importing Data](#)

<i>Field or Control</i>	<i>Description</i>
Import Live	<p>Indicates how the Import Reference Data process loads data into the Campus Solutions tables.</p> <p>You cannot select or clear this check box. The system selects this check box if you selected the Import Live check box on the UCAS Configuration page.</p> <p>If the system selects the check box, the import process loads the data into the staging tables and then into the Campus Solutions tables. If the system does not select the check box, the import process loads the data from the staging tables into the Campus Solutions tables.</p>
Academic Institution	Enter the academic institution for which you want to import the data.

Field or Control	Description
Create/Update External Org Rec (create/update external organization record)	<p>Select this check box to instruct the process to create or update an external organization record for the imported school.</p> <p>If you select this option, and if the process does not find a corresponding external organization record for the imported school, it creates an external organization record. You can view this external organization record using the Organization Table page (Campus Community, Organization, Create/Maintain Organizations, Organization Table).</p> <p>If you select this option, and if the process finds a corresponding external organization record that needs to be updated, it creates a new effective dated record in the Organization Table page. For example, suppose a school's contact email ID has changed and the school already has an associated external organization record in Campus Solutions. When you import the school reference data, the process inserts a new record with the new email ID of the contact.</p> <p>If the check box is cleared, the process imports the cvSchool and cvSchoolContact records into the Campus Solutions tables but does not create external organization records.</p> <p>Creation of External Org records can cause the process to run slowly. Therefore, you can first run the Import Reference Data process without selecting this check box. Then you can run the process again with the Create/Update External Org Rec check box selected to create the external organization records.</p>

Reviewing and Mapping UCAS Courses

Access the UCAS Course page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > UCAS Course**).

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

UTT Course

Academic Institution

PSGBR

PeopleSoft University UK

UCAS Institution Code

Z80

Oracle Education systems

UTT Course

C1X1

Campus

*

Entry Year

2011

*Modular

Yes

Entry Month

8

*Part Time

Full time Only

*Long Name

Biology

Mapping

Academic Career

Postgraduate

Academic Program

PGCES

PG Cert Education (Science)

Academic Plan

BIO

Biology

Academic Sub-Plan

Application Center

GTTR

GTTR

Campus

MAIN

Main Campus

Academic Load

☐ Course Cancelled

Course Cancelled Date

Vacancy Status

English

Maths

Science

Age Range of Children

Status

RUNNING

☐ Criminal Check Required

UCAS Timestamp

☐ Imported

☒ Active

Note: If the UCAS Campus value in cvCourse is *null* (that is, the institution does not have separate UCAS campus codes), then the Import Reference Data process imports the value as *. If you are adding course records manually, you need to add either a valid UCAS campus value or *.

<i>Field or Control</i>	<i>Description</i>
UCAS Timestamp	<p>Displays the date and time when UCAS updated the cvCourse view.</p> <p>This field is read-only and only appears for imported records. For manually added records, this field is blank and you do not need to enter a value.</p>

Mapping

You must map a Campus Solutions academic career, program, and plan for each combination of UCAS course code, entry year and entry month that may exist in an imported application choice. The remaining fields in the Mapping group box are optional. The system uses the mapped values when creating or updating the Campus Solutions application record related to the UCAS application choice.

If you do not map the Application Center and Campus values on this page, then the system uses the default values defined in the UCAS Application Import page.

Reviewing and Mapping UTT Courses

Access the UTT Course page (**Set Up SACR >Product Related >Recruiting and Admissions >UCAS >Mappings >UTT Course**).

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

UTT Course

Academic Institution:	PSGBR	PeopleSoft University UK
UCAS Institution Code:	Z80	Oracle Education systems
UTT Course:	C1X1	
Campus:	*	
Entry Year:	2011	*Modular: No
Entry Month:	8	*Part Time: Full time

*Long Name: Biology

Mapping

Academic Career:	Postgrad	
Academic Program:	PGCES	PG Cert Education (Science)
Academic Plan:	BIO	Biology
Academic Sub-Plan:		
Application Center:		
Campus:		

☐ Course Cancelled

Course Cancelled Date:	
Vacancy Status:	
English:	
Maths:	
Science:	
Age Range of Children:	
Status:	

☐ Criminal Check Required

UCAS Timestamp:

☐ Imported
 ☒ Active

Note: If the UTT Campus value in cvgCourse is *null* (that is, the institution does not have separate UTT campus codes), then the Import Reference Data process imports the value as *. If you are adding course records manually, you need to add either a valid UTT campus value or *.

Field or Control	Description
UCAS Timestamp	<p>Displays the date and time when UTT updated the cvgCourse view.</p> <p>This field is read-only and only appears for imported records. For manually added records, this field is blank and you do not need to enter a value.</p>

Mapping

You must map a Campus Solutions academic career, program, and plan for each combination of UTT course code, entry year and entry month that may exist in an imported application choice. The remaining fields in the Mapping group box are optional. The system uses the mapped values when creating or updating the Campus Solutions application record related to the UTT application choice.

If you do not map the Application Center and Campus values on this page, then the system uses the default values defined in the UTT/Apply Import page.

Field or Control	Description
Academic Load	<p>The value you enter here is used in Approved Academic Load when creating or updating CS applications for UTT applications. Otherwise, it is derived from the part-time value from ivgStarG.</p>

Reviewing and Mapping Area of Permanent Residence

Access the Area of Permanent Residence page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Area of Permanent Residence**).

This example illustrates the fields and controls on the Area of Permanent Residence page. You can find definitions for the fields and controls later on this page.

Area of Permanent Residence


Academic Institution: PSUNV PeopleSoft University


Domicile: 001

Description: BELFAST

HESA Code: XG ☒ **LEA Flag**

Mapping

Country: GBR  United Kingdom

State: BFS  Belfast

☒ **Imported**

☒ **Active**

Mapping

In the **Country** and the **State** fields, enter the Campus Solutions country and state codes to map to the UCAS domicile code.

Reviewing and Mapping Disability Data

Access the Disability page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Disability**).

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

Disability

Academic Institution:	PSUNV	PeopleSoft University
Disability Code:	3	

Description Deaf/partial hearing

HESA Code: 03

Mapping

Disability:	Hearing	▼
Type of Impairment:	Hearing Disability	▼

☒ **Imported**

☒ **Active**

Mapping

In the **Disability** and **Type of Impairment** fields, enter the Campus Solutions disability and type of impairment codes to map to the UCAS disability code.

Reviewing and Mapping Ethnicity Data

Access the Ethnic page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Ethnic**).

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

Ethnic

Academic Institution:	PSUNV	PeopleSoft University
Ethnic Code:	10	

Description: Whit

HESA Code:

Mapping

SetID:	PSUNV	Peoplesoft University
Regulatory Region:	GBR	United Kingdom
Ethnic Group:	WHITE	White British

☒ **Imported**

☒ **Active**

Mapping

In the **SetID** field, enter the setID of your institution. In the **Regulatory Region** field, enter the Campus Solutions regulatory region code. In the **Ethnic Group** field, enter the Campus Solutions ethnic code to map to the UCAS ethnic code.

Reviewing and Mapping Residential Category Data

Access the Residential Category page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Residential Category**).

Mapping

In the **Residency** field, enter the Campus Solutions residency code to map to the UCAS residential category code.

Reviewing and Mapping Country Data

Access the Country page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Country**).

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

Country

Academic Institution: PSUNV PeopleSoft University

Country Code: 124

Description: Great Britai

Country Type

Mapping

Country: GBR United Kingdom

☒ Imported

☒ Active

Mapping

In the **Country** field, enter the Campus Solutions country code to map to the UCAS country code.

Reviewing and Mapping Nationality Data

Access the Nationality page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Nationality**).

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

Nationality

Academic Institution: PSUNV PeopleSoft University

Nationality: 610

Description: Other

HESA Code:

Mapping

Country: CHN China

Citizenship Status: 1 Citizen

☒ Imported

☒ Active

Mapping

In the **Country** and **Citizenship Status** fields, enter the Campus Solutions country and citizenship status codes to map to the UCAS nationality code.

Reviewing Exam Level Data

Access the Exam Levels page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Exam Levels**).

Mapping to Qualification Text is no longer used for ivStarPQR records and is no longer required.

Importing UCAS and UTT Applications and Applicant Data

This section provides an overview of importing applications and applicant data into your database, and discusses how to:

- View the transaction setup.
- Define the search/match criteria.
- Enter the applicant import parameters.
- Import new applicants.
- Import HESA data.
- Review and edit the suspense data.

- View, update, and delete application staging data.
- Define a timestamp for re-importing data.

Understanding Importing UCAS and UTT Applications and Applicant Data

When you import applicant data, the system creates new person records in your database or updates details about existing person records. First, you must ensure that you are not going to create any duplicate data by setting up the search/match parameters. Then, you run the Import Applicant Data process to load the application and applicant data into your database. The search/match process determines if the person might already exist in your database. The purpose of the search/match is to prevent duplicate records. You can specify what you want the post process to do when search/match finds a match or multiple matches. It is recommended that you set the status as *Suspend* when you set up the search/match criteria for multiple matches. Based on the results of the search/match process, the import process can update the record in your database that matches the imported data if you are sure that the person in your database is the same person to whom the imported data relates.

The Import Applicant Data process allows data to be imported from:

- UCAS iv views, if you selected **UCAS** on the UCAS Configuration page
- UTT iv views, if you selected **UTT**.
- Apply applications, if you selected **Use Apply**.

If Import Live is selected, the system imports data into Campus Solutions tables through the staging tables based on the import options selected for UCAS, UTT, and Apply. You can select Import Live *only if* you selected it in UCAS Configuration.

- If Personal ID and Application Code are specified, all application records for the applicant are imported irrespective of timestamp.
- If Personal ID and Application Code are not selected, records are imported to the staging tables based on the timestamp records for each system. For UCAS and UTT, internal timestamp records for each view are considered. For Apply, a single internal timestamp record is considered.
 - If there is an internal timestamp record, records with a higher timestamp than the internal timestamp value (set on the previous run of the import) are imported unless Override Timestamp is defined, in which case records with a higher timestamp than that value are imported.
 - If there is no internal timestamp record, for UCAS and UTT all records are imported for the view. For Apply, records updated since 2020-01-01T00:00:00Z are imported. At the end of the import, the internal timestamp records are updated to reflect the highest imported timestamp value.

If Import Live isn't selected, new records are not imported and existing staging records are re-processed based on the import options selected for UCAS, UTT, and Apply.

The Import Applicant Data process imports data from the ivContextual view *only if* the Contextual check box is selected *and* Cycle is 2012 or later on the UCAS Configuration page.

Also, the process imports data from the Unicode version of views *only if* the Unicode check box is selected on the UCAS Configuration page. For example, if you have selected the Unicode check box, the process imports data from the Unicode views, such as ivStarAU and ivStarJU. Conversely, if you have not

selected the Unicode check box, the process imports data from the standard views, such as ivStarA and ivStarJ.

You can view, update, or delete the suspended UCAS and UTT application data in the staging tables using the Staging Data pages. You can search for the suspended data based on various search parameters including import status, application code and personal ID.

The import process creates a corresponding Campus Solutions application record for each imported application choice. If an applicant has more than one ChoiceNo for an AppCode at your institution, the import process creates a separate Campus Solutions application record for each AppCode and ChoiceNo combination. You can use the Maintain Applications component to access the Campus Solutions application record. Each application record will have an effective date that indicates the date when you imported the application. If you import updates to the same application on different days, the system creates new application records with the different effective dates. If you import updates to the same application multiple times on a particular day, the system updates the Campus Solutions application record for that particular date. In addition to creating (or updating) the Campus Solutions application for an imported choice matching the local institution code that you have defined on the UCAS Configuration page, the process also creates (or updates) the Campus Solutions application for an imported UTT choice whose Accrediting Provider value matches the local institution code.

The import process also creates (or updates) the Campus Solutions applications for imported Apply applications where Accredited Institution is selected in the institution reference data record for an institution code. The process also creates an application choice record in Campus Solutions for the imported application choice. You can use the UCAS Applications, UTT Applications, Apply Applications components to view the imported application choice.

If the related application choice record from ivStarC has not been imported, message 14250,176 is logged for incoming records from ivOffer. Typically this occurs where the ivStarC record remains in staging because of a missing mapping. In cases where 14250,176 is logged for ivOffer, there is also usually, an error message logged for the missing mapping as part of the ivStarC import. The ivOffer staging record status is set to *Pending* and is reprocessed once the related choice staging record has been successfully imported.

For more information about these components, see [Reviewing Imported UCAS and UTT Applications and Applicant Data](#).

Suppose you are importing a UCAS or UTT choice and its decision value already exists in ivStarC or ivgStarG. For such a choice, when you run the import process for the first time, the process creates the Campus Solutions application and populates the Program Action and Action Reason of the Application Program Data record based on the following mappings set up on the program action page of the UCAS Configuration component:

UCAS processing - ivStarC:

- If Decision = I, use action/reason for *Interview*
- If Decision = F, use action/reason for *Course Full*
- If Decision = R, use action/reason for *Rejection*
- If Decision = W, use action/reason for *Withdrawal*
- If Decision = C or D and Reply = F, use action/reason for *Conditional Firm*

- If Decision = C or D and Reply = I, use action/reason for *Conditional Insurance*
- If Decision = C or D and Reply = D, use action/reason for *Conditional Decline*
- If Decision = C or D and Reply = blank, use action/reason for *Conditional Offer*
- If Decision = U and Reply = F, use action/reason for *Unconditional Firm*
- If Decision = U and Reply = I, use action/reason for *Unconditional Insurance*
- If Decision = U and Reply = D, use action/reason for *Unconditional Decline*
- If Decision = U and Reply = blank, use action/reason for *Unconditional Offer*
- If Decision and Reply are blank (i.e. most new applications) or any other combination, then set Program Action = APPL, Action Reason = default value or blank
- Else set program action = APPL and reason = default value (if defined) from the UCAS Application Import page of the UCAS Configuration component.

Processing updates ensure that for applications where a decision has been made but a reply has not yet been received, if a new row is added for a change of course/campus, term or entry point, then a second new row is added to ensure that the most recent row reflects the decision value.

If during import,

- A new row is added for any of the following: **Changed Course/Campus, Changed Term, Changed Entry Point;**
- And, the new Decision value is not blank;
- And, both the new and existing Reply values are blank (no subsequent Reply Change row will be added);

Then, a new row is added based on the Decision value of the choice. For example, if the Decision = C, then the program action and reason for Conditional Offer are used for the new row.

For applications previously rejected or declined by default and then re-instated, processing updates add a row to reflect the decision and reply of the choice.

If the new **Action** value is blank and the existing Action for the choice is *D* or *R*, the Campus Solutions application is updated based on the new decision/reply values. For example, if the Decision = C and Reply = F, the program action and reason for Conditional Firm are used for the new row.

UTT processing - ivgStarG:

- If ClearingStatus is not '2' or '3' (non-clearing applications), set the program action/reason.
- Set the new Clearing flag in the choice record to *N*
- If Decision = I, use action/reason for *Interview*
- If Decision = G, use action/reason for *Course Closed*
- If Decision = R, E, M, or S, use action/reasons for *Rejection, Rejection - English, Rejection - Maths, Rejection - Science*

- If Decision = W, use action/reason for *Withdrawal*
- If Decision = C or D and Reply = F, use action/reason for *Conditional Firm*
- If Decision = C or D and Reply = D, use action/reason for *Conditional Decline*
- If Decision = C or D and Reply = blank, use action/reason for *Conditional Offer*
- If Decision = U and Reply = F, use action/reason for *Unconditional Firm*
- If Decision = U and Reply = D, use action/reason for *Unconditional Decline*
- If Decision = U and Reply = blank, use action/reason for *Unconditional Offer*
- If Decision and Reply are blank (i.e. most new applications) or any other combination, then set Program Action = APPL, Action Reason = default value or blank
- Else set program action = APPL, reason = default value (if defined) from the UTT/Apply Import page of the UCAS Configuration component.

When choices are initially imported for UCAS (ivStarC or ivStarZ1) and UTT (ivgStarG), if there are existing values for Decision or Reply, then the program action/reason of the newly created application is set to the appropriate combination. However, there is a limitation on which program action values can be used when a Campus Solutions application is initially created. For the first effective-dated record, only these program actions are valid: ADMT (Admit), DENY (Deny/Reject), RAPP (Re-admit), RECN (Re-consideration), WAPP (Applicant Withdrawal) or WADM (Administrative Withdrawal). When these program actions are used to create the initial record, the application is created with that program action. Otherwise, the application is created using APPL program action and the default action reason (if available) or blank. If the mapped program action is a value other than ADMT, APPL, DEIN, DENY, RECN, WADM or WAPP, then a second row is added to the application record to reflect the decision/reply mapping.

Processing updates ensure that for applications where a decision has been made but a reply has not yet been received, if a new row is added for a change of course/campus or term, then a second new row is added to ensure that the most recent row reflects the decision value.

If during import,

- A new row is added for either **Changed Course/Campus** or **Changed Term**;
- And, the new Decision value is not blank;
- And, both the new and existing Reply values are blank (no subsequent Reply Change row will be added);

Then, a new row is added based on the Decision value of the choice. For example, if the Decision = C, then the program action and reason for Conditional Offer are used for the new row.

For applications previously rejected or declined by default and then re-instated, processing updates add a row to reflect the decision and reply of the choice.

If the new **Action** value is blank and the existing Action for the choice is D or R, the Campus Solutions application is updated based on the new decision/reply values. For example, if the Decision = C and Reply = F, the program action and reason for Conditional Firm are used for the new row.

The Import Applicant Data process uses the Nationality page mapping to import the passport field values from StarK and create the citizenship and passport records. If the nationality value in an imported record does not have a corresponding country code mapping, then the process does not create a citizenship and passport record. The process logs an error message and the record is retained in the staging tables.

Suppose you have mapped a nationality with a country code but did not map the same nationality with a citizenship status. In this case, if a citizenship record does not exist in Campus Solutions for the imported record, the process creates a new blank citizenship record. That is, the process enters only the Country value and leaves the Citizenship Status value as blank on the Citizenship Detail page (Add/Update a Person component).

Suppose you have mapped a nationality *610* with a country code *CHN* and citizenship status *1* (Citizen). The citizenship record for a person named Eric with the same nationality exists in Campus Solutions with a different citizenship status *2* (Naturalized). In this case, when the process again imports Eric's record that has a nationality of *610*, it updates Eric's citizenship record in Campus Solutions with the mapped citizenship status *1*.

The Import Applicant Data process processes an incoming passport record if you have mapped the Nationality and Country values and if UCAS has provided a passport number. The process creates or updates a passport record for the applicant in the following ways:

- If the applicant's passport record with the Country and Passport Number combination exists in Campus Solutions, then the process updates that record with the incoming passport issue date, expiry date and place issued values.
- If the applicant's passport record with the Country and Passport Number combination does *not* exist in Campus Solutions, then the process creates a new record using the incoming values.

The import process uses the Forenames and Surname values from StarN to create or update a Primary and Preferred Name record in Campus Solutions. However, if Preferred First Name value from StarK exists, then the import process uses this StarK value to create or update the Preferred Name record for the applicant. A Preferred First Name is not supplied in Apply, so the preferred name record is created using the same values in Forenames in the primary name record.

If the LastEducation value exists in the ivStarK view and the school code is mapped to a Campus Solutions External Org in the imported School reference data, the process populates this mapped External Org value in the Application School/Recruiting page for the Campus Solutions application record. If the LastEducation value does not exist, but the School value exists in the ivStarK view and the school code is mapped to a Campus Solutions External Org in the imported School reference data, the process populates this mapped External Org value in the Application School/Recruiting page.

Pages Used to Import UCAS and UTT Applications and Applicant Data

Page Name	Definition Name	Navigation	Usage
Transaction Setup	SCC_TRANSAC_DTLS	Student Admissions > UCAS Processing > Import Applicants > Transaction Setup	View the delivered UCAS and Apply transactions that you can use in the Transaction Search/Match Setup page. Do not modify any values for these delivered transactions or create new ones.

Page Name	Definition Name	Navigation	Usage
Search/Match Setup	SCC_SEARCH_PARMS	Student Admissions > UCAS Processing > Import Applicants > Transaction Setup > Search/Match Setup	Define search and match parameters for the delivered UCAS transaction, which specify what UCAS data the system will append to existing records in your database and which UCAS data the system will suspend or ignore.
Import Applicant Data	SAD_UC_RUN_CNTL	Student Admissions > UCAS Processing > Import Applicants > Import Applicant Data	Import the UCAS, UTT, and Apply applicant data into your system. Before you import the data, set up the search/match parameters on the Search/Match Processing pages.
Transaction Data	SCC_TRANSAC_DATA	Student Admissions > UCAS Processing > Import Applicants > Transaction Data	After you run the Import Applicant Data process, use this page to review the status of a UCAS record with regard to loading, searching/matching, and posting processing. For example, determine if a record is waiting to be processed or if a record caused a new person to be added to your database.
UCAS Contextual Staging Data	SAD_UC_I_IVCONXT	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivContextual Staging Data	View, update, or delete the suspended ivContextual data stored in the staging tables.
UCAS Education Staging Data	SAD_UC_I_EDUCAT	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivEducation Staging Data	View, update, or delete the suspended ivEducation data stored in the staging tables.
UCAS Employment Staging Data	SAD_UC_I_IVEMPL	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivEmployment Staging Data	View, update, or delete the suspended ivEmployment data stored in the staging tables.
UCAS Form Quals Staging Data	SAD_UC_I_IVFMQ	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivFormQuals Staging Data	View, update, or delete the suspended ivFormQuals data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
UCAS Offer Staging Data	SAD_UC_I_OFFER	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivOffer Staging Data	View, update, or delete the suspended ivOffer data stored in the staging tables.
UCAS Prep Activities Staging Data	SAD_UC_I_IVPREP	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivPrepActivities Staging Data	View, update, or delete the suspended ivPrepActivities data stored in the staging tables.
UCAS Qualification Staging Data	SAD_UC_I_IVQUAL	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivQualification Staging Data	View, update, or delete the suspended ivQualification data stored in the staging tables.
UCAS Reference Staging Data	SAD_UC_I_IVREF	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivReference Staging Data	View, update, or delete the suspended ivReference data stored in the staging tables.
UCAS StarA Staging Data	SAD_UC_I_STARA	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarA Staging Data	View, update, or delete the suspended ivStarA data stored in the staging tables.
UCAS StarC Staging Data	SAD_UC_I_IVSTRC	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarC Staging Data	View, update, or delete the suspended ivStarC data stored in the staging tables.
UCAS StarH Staging Data	SAD_UC_I_IVSTH	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarH Staging Data	View, update, or delete the suspended ivStarH data stored in the staging tables.
UCAS StarJ Staging Data	SAD_UC_I_IVSTJ	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarJ Staging Data	View, update, or delete the suspended ivStarJ data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
UCAS StarK Staging Data	SAD_UC_I_IVSTK	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarK Staging Data	View, update, or delete the suspended ivStarK data stored in the staging tables.
UCAS StarN Staging Data	SAD_UC_I_STARN	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarN Staging Data	View, update, or delete the suspended ivStarN data stored in the staging tables.
UCAS StarPQR Staging Data	SAD_UC_I_IVPQR	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarPQR Staging Data	View, update, or delete the suspended ivStarPQR data stored in the staging tables.
UCAS StarW Staging Data	SAD_UC_I_STARW	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarW Staging Data	View, update, or delete the suspended ivStarW data stored in the staging tables.
UCAS StarX Staging Data	SAD_UC_I_IVSTX	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarX Staging Data	View, update, or delete the suspended ivStarX data stored in the staging tables.
UCAS StarZ1 Staging Data	SAD_UC_I_STARZ1	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStarZ1 Staging Data	View, update, or delete the suspended ivStarZ1 data stored in the staging tables.
UCAS Statement Staging Data	SAD_UC_I_IVSTAT	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivStatement Staging Data	View, update, or delete the suspended ivStatement data stored in the staging tables.
UCAS Unit Results Staging Data	SAD_UC_I_IVUNRS	Student Admissions > UCAS Processing > Import Applicants > UCAS Staging Data > ivUnitResults Staging Data	View, update, or delete the suspended ivUnitResults data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
UTT Degree Contents Staging Data	SAD_UC_I_IVGDGC	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgDegreeContents Staging Data	View, update, or delete the suspended ivgDegreeContents data stored in the staging tables.
UTT Education Staging Data	SAD_UC_I_GEDUCAT	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgEducation Staging Data	View, update, or delete the suspended ivgEducation data stored in the staging tables.
UTT First Degree Staging Data	SAD_UC_I_IVGFDG	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgFirstDegree Staging Data	View, update, or delete the suspended ivgFirstDegree data stored in the staging tables.
UTT Form Quals Staging Data	SAD_UC_I_IVGFMQ	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgFormQuals Staging Data	View, update, or delete the suspended ivGFormQuals data stored in the staging tables.
UTT Offer Staging Data	SAD_UC_I_GOFFER	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgOffer Staging Data	View, update, or delete the suspended ivgOffer data stored in the staging tables.
UTT Other Languages Staging Data	SAD_UC_I_IVGOLN	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgOtherLanguages Staging Data	View, update, or delete the suspended ivgOtherLanguages data stored in the staging tables.
UTT Reference Staging Data	SAD_UC_I_IVGREF	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgReference Staging Data	View, update, or delete the suspended ivgReference or Apply reference data stored in the staging tables.
UTT StarA Staging Data	SAD_UC_I_GSTARA	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarA Staging Data	View, update, or delete the suspended ivGStarA or Apply contact details data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
UTT StarG Staging Data	SAD_UC_I_IVSTRG	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarG Staging Data	View, update, or delete the suspended ivgStarG or Apply application data stored in the staging tables.
UTT StarH Staging Data	SAD_UC_I_IVGSTH	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarH Staging Data	View, update, or delete the suspended ivgStarH data stored in the staging tables.
UTT StarJ Staging Data	SAD_UC_I_IVGSTJ	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarJ Staging Data	View, update, or delete the suspended ivgStarJ data stored in the staging tables.
UTT StarK Staging Data	SAD_UC_I_IVGSTK	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarK Staging Data	View, update, or delete the suspended ivgStarK or Apply application data stored in the staging tables.
UTT StarN Staging Data	SAD_UC_I_GSTARN	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarN Staging Data	View, update, or delete the suspended ivgStarN or Apply candidate data stored in the staging tables.
UTT StarW Staging Data	SAD_UC_I_GSTARW	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarW Staging Data	View, update, or delete the suspended ivgStarW data stored in the staging tables.
UTT StarX Staging Data	SAD_UC_I_GSTARX	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgStarX Staging Data	View, update, or delete the suspended ivgStarX data stored in the staging tables.
UTT Statement Staging Data	SAD_UC_I_IVGSTA	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgstatement Staging Data	View, update, or delete the suspended ivgStatement or Apply personal statement data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
UTT Experience Staging Data	SAD_UC_I_IVGEXP	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > ivgExperience Staging Data	View, update, or delete the suspended ivgExperience or Apply work experience data stored in the staging tables.
Qualifications Staging Data	SAD_UC_I_AQUAL_PG	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > Qualifications Staging Data	View, create, or update Apply qualifications data stored in the staging tables.
Offering Conditions Staging Data	SAD_UC_I_ACOND_PG	Student Admissions > UCAS Processing > Import Applicants > UTT Staging Data > Offer Conditions Staging Data	View, create, update, or delete data stored in the staging tables for any conditions associated with an Apply offer. This record allows multiple conditions per choice.
Internal Timestamps	SAD_UC_TIMESTAMP	Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Timestamps	For an institution, reset a timestamp to a previous date if you want to re-import records. See the highest timestamp when the view was last imported. Additionally, see the number of records that were added, deleted, or amended when the view was last imported.

Viewing the Transaction Setup

Access the Transaction Setup page (**Student Admissions > UCAS Processing > Import Applicants > Transaction Setup**).

This example illustrates the fields and controls on the Transaction Setup page (1 of 2).

Transaction Setup		Search/Match Setup	
Transaction:	UCAS		
*Transaction Name:	<input type="text" value="UCAS"/>		
Transaction Description:	<input type="text" value="UCAS Applicant Import"/>		
*Transaction Status:	<input type="text" value="Active"/> ▼		
*Data Update Rule:	<input type="text" value="DEFAULT_UPDATE_RULE"/> 🔍		
Transaction Options			
<input checked="" type="checkbox"/> Online Transaction	Process Search/Match:	<input type="radio"/> Batch	<input checked="" type="radio"/> Realtime
			<input type="checkbox"/> Run on Save
Transaction Handler			
*Root Package ID:	<input type="text" value="SAD_UC_TRANSACTION"/> 🔍		
*Path:	<input type="text" value="TRANSACTION"/> 🔍		
*Application Class ID:	<input type="text" value="UCASTransaction"/> 🔍		
Transaction Status and Date			
*Staged Record Name:	<input type="text" value="SCC_STG_CONSTIT"/> 🔍 Constituent		

This example illustrates the fields and controls on the Transaction Setup page (2 of 2).

Constituent Handler	
*Root Package ID:	<input type="text" value="SCC_SL_TRANSACTION"/> 🔍
*Path:	<input type="text" value="INTFC"/> 🔍
*Application Class ID:	<input type="text" value="DefaultConstituent"/> 🔍
Partition Data	
<input type="radio"/> By Constituent	<input checked="" type="radio"/> By Transaction
Transaction Data Launch View	
Menu Name:	<input type="text"/> 🔍
Menu Bar Name:	<input type="text"/> 🔍
Menu Item Name:	<input type="text"/> 🔍
Menu Page Name:	<input type="text"/> 🔍

The system uses the delivered UCAS and Apply transactions to process the incoming UCAS, UTT, and Apply data. Do not change any values for this transaction.

Defining the Search/Match Criteria

Access the Search/Match Setup page (**Student Admissions > UCAS Processing > Import Applicants > Transaction Setup > Search/Match Setup**).

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

Transaction Setup

Search/Match Setup

Transaction:

UCAS

UCAS

Run Search/Match

Process Search/Match:

☐ Batch
 ☒ Realtime
 ☐ Run on Save

Search Type:

Person

*Search Parameter:

PSCS_TRADITIONAL

CS_Person Traditional

*Search Result Code:

PSCS_TRAD_RESUL

CS_Person Traditional Results

Match(es) Found

Customize | Find |

First 1-5 of 5 Last

	Search Order Nbr	Description	*One Match	*Multiple Matches
1	10	Name,Addr,City,Bday,Gender,SSN	Update	Suspend
2	20	SSN Only	Update	Suspend
3	30	Name,Bday,Gender	Suspend	Suspend
4	40	Name,Gender	Suspend	Suspend
5	50	Name Only	Suspend	Suspend

No Match Found

☒ Add
 ☐ Suspend
 ☐ Ignore

The system uses this delivered *UCAS* transaction to process the incoming UCAS, UTT, and Apply data. Therefore, you will need to define search match parameters for the *UCAS* transaction.

Use the **Search Parameter** field to select the group of predefined search parameters that you want to use for the Import Applicant Data process.

Use the **Search Result Field** field to select a search result value that you defined in the Search Result page.

It is recommended that you change the Number of Characters of FirstNameSrchrRule and LastNameSrchrRule to 7 for PSCS_10, PSCS_30, PSCS_40 and PSCS_50 in the Search/Match Rules page. Select **Set Up SACR > System Administration > Utilities > Search/Match > Search/Match Rules** to navigate to the Search/Match Rules page.

For information about setting up search/match rules, search parameters and results, see "Understanding Search/Match" (Campus Community Fundamentals) and "Setting Up Search/Match" (Campus Community Fundamentals)

Note: You must define at least one Suffix value in the Name Suffix table (**Set Up Common Objects >Foundation Tables >Personal >Name Suffix**).

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Field or Control	Description
Search Order Nbr (search order number)	For each order number, select what you want to do with the record if the search/match/post process discovers one or more matching records.
One Match and Multiple Matches	<p>Select whether you want to add, update, suspend, or ignore matching records:</p> <p><i>Add:</i> Add a new record to your database using the staging table record.</p> <p><i>Update:</i> Update the existing record with the data in the staging table record.</p> <p><i>Suspend:</i> Keep the suspense record back in the staging table. Determine manually whether or not this record matches a record in your database.</p> <p><i>Ignore:</i> Ignore the staging table record that matched a record in your database.</p> <p>The process marks the record to be purged.</p>

No Match Found

Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database:

Add: Add the unmatched record, including personal data, to your database.

Suspend: Keep the unmatched record in the staging tables to be looked at manually.

Ignore: Ignore the unmatched record completely. The process marks the record to be purged.

Entering the Applicant Import Parameters

Access the Import Applicant Data page (**Student Admissions > UCAS Processing > Import Applicants > Import Applicant Data**).

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

Import Applicant Data

Run Control ID: UCAS

Report Manager

Process Monitor

Run

Import Applicant Parameters

*Academic Institution

PSGBR

☒ Import Live

UCAS

UTT

Apply

Import Applicants

☐

☐

☒

Import Biographical Data

☐

☐

Import Examination Results

☐

Import Application Choices

☐

☐

Import HESA Data

☐

☐

Personal ID

C1951

Application Code

2489

Field or Control	Description
Academic Institution	Enter the academic institution for which you want to import data.
Import Live	<p>Select if you want the import process to load the data into the staging tables and then into the Campus Solutions tables. If you do not select this check box, the import process loads the data from the staging tables into the Campus Solutions tables.</p> <p>By default, the system selects this check box if the Import Live check box on the UCAS Configuration page is selected.</p>

Field or Control	Description
Import Applicants	<p>Indicates whether the process imports applicant data from UCAS, UTT, or Apply API.</p> <p>Either one of these options can be selected, but not both. Or none needs to be selected.</p> <ul style="list-style-type: none"> The system selects the UCAS or UTT check boxes if you selected UCAS or UTT on the UCAS Configuration page. <p>If the system selects the UTT check box, the process imports applicant data from UTT ivgStarN, ivgStarA, and ivgStarK views. If the system selects the UCAS check box, the process imports applicant data from UCAS ivgStarN, ivStarA, and ivStarK views.</p> <hr/> <p>Note: When importing applications using the odbc-link, either UCAS or the UTT check box for Import Applicants must appear selected for the Import Applicant Data process to run successfully.</p> <hr/> <ul style="list-style-type: none"> When you're importing applicant data using the Apply API, select the Apply check box for Import Applicants. When you select this, the UTT Import Applicants check box is automatically deselected. This prevents the UTT and Apply processing from running at the same time. <hr/> <p>Note: The Apply check box is enabled <i>only</i> when you select Use Apply on the UCAS Configuration page.</p> <hr/> <p>See Preparing for UCAS and UTT Data Processing.</p>

Field or Control	Description
Import Biographical Data	<p>Select the UCAS check box if you want to import application biographical data from the following UCAS views:</p> <ul style="list-style-type: none"> • ivStarX • ivStarH • ivFormQuals • ivQualification • ivEducation • ivEmployment • ivPrepActivities • ivContextual <p>Select the UTT check box if you want to import application biographical data from the following UTT views:</p> <ul style="list-style-type: none"> • ivgStarX • ivgStarH • ivgFormQuals • ivgEducation • ivgExperience • ivgOtherLanguages • ivgFirstDegree • ivgDegreeContents <p>Select both check boxes if you want to import application biographical data from the UTT and UCAS views.</p>
Import Examination Results	<p>Select the UCAS check box if you want to import data from ivStarPQR and ivUnitResults views.</p>

Field or Control	Description
Import Application Choices	<p>Select the UCAS check box if you want to import application choices from these UCAS views:</p> <ul style="list-style-type: none"> • ivStarC • ivStarW • ivReference • ivStatement • ivOffer • ivStarZ1 <p>Select the UTT check box if you want to import application choices from the following UTT views:</p> <ul style="list-style-type: none"> • ivgStarG • ivgStarW • ivgReference • ivgStatement • ivgOffer <p>Select both check boxes if you want to import application choices from UTT and UCAS.</p>
Import HESA Data	<p>Select the UCAS check box if you want to import ivStarj data.</p> <p>Select the UTT check box if you want to import ivgStarj data.</p>

Field or Control	Description
Personal ID and Application Code	<p>Specify the UCAS or UTT personal ID and application code, or the Apply candidate ID and application ID if you want to re-import all the records of a particular applicant (that has previously been incorrectly matched and then deleted). If you specify the personal ID and application code here, then during the selection from applicant views, the import process will select only records for that applicant, irrespective of the Earliest Application Year that you configured and timestamp values. If you leave these two fields blank, the process selects records for all applicants based on the timestamp in the views and updates the internal timestamp with the highest imported timestamp value. For more information on the internal timestamp settings:</p> <p>Defining a Timestamp for Re-importing Data</p> <p>The Personal ID and Application Code fields are available only when you select the Import Live check box on this page.</p> <hr/> <p>Note: By using the Personal ID and Application Code fields, you can specify only one applicant for a single run of the Import Applicant Data process and you need to ensure that the correct UCAS, UTT, or Apply import check boxes are selected on this page.</p> <p>Also, note that if you specify a personal ID, then the application code is required. Application code is expanded to a 10-digit value to allow a 10-digit Apply application ID.</p>

If you have installed CRM for Higher Education, you can run an EIP batch replay process following the main Import Applicant Data process. The following example shows the options available on the Process Scheduler Request page when CRM for HE is installed.

This example illustrates the fields and controls on the Process Scheduler Request page for the Import Applicant Data process. You can find definitions for the fields and controls later on this page.

Process Scheduler Request

User ID: PS Run Control ID: AD

Server Name: Run Date: 03/03/2010

Recurrence: Run Time: 4:44:41AM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Batch Replay UCAS	EIPUCAS	PSJob	(None)	(None)	Distribution
<input checked="" type="checkbox"/>	SAD_UC_IMPAP	SAD_UC_IMPAP	Application Engine	Web	TXT	Distribution

If you select the Batch Replay UCAS option, the Import Applicant Data process (SAD_UC_IMPAP) runs first and then the EIP Batch Replay (SCC_BAT_RPLY) runs. If you select the SAD_UC_IMPAP option, only the Import Applicant Data process runs.

For more information about the EIP Batch Replay process see *CRM for Higher Education Developer's Guide*.

Importing New Applicants

To process the ivStarN and ivgStarN staging records, the Import Applicant Data process performs the following initial processing steps to determine if the applicant already exists in the system. The steps are followed until an EMPLID is found. If an EMPLID is not found, then the Import Applicant Data process invokes the search/match processing.

1. Check if there is a matching applicant record for the local institution in SAD_UC_APPLREC. This check is made by matching the applicant's Institution, Personal ID and App Code.

For Apply, Personal ID is populated with candidate ID and App Code with application ID.

2. Check if there is a matching applicant record for another institution in SAD_UC_APPLREC. This check is made by matching the applicant's Personal ID and App Code.
3. Check if there is a matching applicant record from previous cycle or other system (UCAS or UTT) in SAD_UC_APPLREC. This check is made by matching only the Personal ID of either:
 - a. Applicant record for the same system (that is, UCAS for UCAS applicants, GTTR for UTT applicants) for a previous cycle with a different App Code.
 - b. Applicant record for the other system (that is, UTT for UCAS applicants and UCAS for UTT applicants).
4. Check the External System ID of the same system. This check is made by matching Personal ID to External System ID of the same system, that is, UC for UCAS applicants, GT for UTT applicants.
5. Check the External System ID of other system. This check is made by matching Personal ID to External System ID of the other system, that is, GT for UCAS applicants and UC for UTT applicants.
6. Check the Legacy External System ID. This check is made by matching Personal ID to the UP External System ID. This check is for legacy records that your institution may have imported using a localisation provided by a vendor.

For Apply applications, the matching is restricted to *only* existing Apply applications. Matching on external system ID isn't relevant to Apply applications. Before records are added to SAD_UC_APPLREC, the values in the new row are compared to the previous row (if they exist) to determine whether updates are required. For new applicants that aren't matched to an existing applicant or person, constituent staging names, address, phone, email, NID, and citizenship records are created and the core records are created or updated via CTM.

Mapping Applicant Data

The following tables show the mappings between the UCAS applicant views and the various staging and base records in Campus Solutions.

- Import Applicants

<i>odbc-link View</i>	<i>Staging Record</i>	<i>Record</i>
ivStarN	SAD_UC_I_STARN	SAD_UC_APPLREC
ivStarA	SAD_UC_I_STARA	SAD_UC_APPLREC
ivStarK	SAD_UC_I_IVSTK	SAD_UC_IVSTK

- Import Biographic Data

<i>odbc-link View</i>	<i>Staging Record</i>	<i>Record</i>
ivContextual	SAD_UC_I_IVCNTX	SAD_UC_IVCONXTT
ivEducation	SAD_UC_I_EDUCAT	SAD_UC_EDUCAT
ivEmployment	SAD_UC_I_IVEMPL	SAD_UC_IVEMPL
ivFormQuals	SAD_UC_I_IVFMQ	SAD_UC_FRMQUAL
ivQualification	SAD_UC_I_IVQUAL	SAD_UC_IVQUAL
ivPrepActivities	SAD_UC_I_IVPREP	SAD_UC_IVPREP
ivStarH	SAD_UC_I_IVSTH	SAD_UC_IVSTH
ivStarX	SAD_UC_I_IVSTX	SAD_UC_IVSTX

- Import Choices

<i>odbc-link View</i>	<i>Staging Record</i>	<i>Record</i>
ivStarZ1	SAD_UC_I_STARZ1	SAD_UC_IVSTARC
ivStarC	SAD_UC_I_IVSTRC	SAD_UC_IVSTARC SAD_UC_OTH_CH

odbc-link View	Staging Record	Record
ivOffer	SAD_UC_I_OFFER	SAD_UC_OFFER SAD_UC_OTH_OFF
ivReference	SAD_UC_I_IVREF	SAD_UC_REFERENC
ivStatement	SAD_UC_I_IVSTAT	SAD_UC_STATEMNT
ivStarW	SAD_UC_I_STARW	SAD_UC_STARW

- Import Exam Results

odbc-link View	Staging Record	Record
ivStarPQR	SAD_UC_I_IVPQR	SAD_UC_FRMQUAL
ivUnitResults	SAD_UC_I_IVUNRS	SAD_UC_IVUNRS

- Import HESA Data

odbc-link View	Staging Record	Record
ivStarJ	SAD_UC_I_IVSTJ	SCC_HE_PERSON SCC_HE_QUAL_ENT SCC_HE_INST_FLD SAD_UC_POCC2010
ivStarJ	SAD_UC_I_IVSTJQ	SCC_HE_QUAL_ENT

Mapping Apply Applicant Data

The following tables show the mappings between the Apply applicant views and the various staging and base records in Campus Solutions.

The records marked with a single asterisk are shared with UCAS and UTT. The ones marked with two asterisks are only for Apply. The rest are shared only with UTT.

Data	Staging Record	Record
Candidate	*SAD_UC_I_STARN	*SAD_UC_APPLREC
Contact Details	*SAD_UC_I_STARA	*SAD_UC_APPLREC
Application	SAD_UC_I_IVGSTK	SAD_UC_IVGSTK
Course/Offer	SAD_UC_I_IVSTRG	SAD_UC_IVSTARG
Offer/Conditions	**SAD_UC_I_ACOND	**SAD_UC_ACOND
Personal Statement	SAD_UC_I_IVGSTA	SAD_UC_STATEMNT
Qualification	**SAD_UC_I_AQUAL	**SAD_UC_AQUAL
Jobs, Volunteering	SAD_UC_I_IVGEXP	SAD_UC_IVGEXP
References	SAD_UC_I_IVGREF	SAD_UC_REFERENC

Mapping UTT Applicant Data

The following tables show the mappings between the UTT applicant views and the various staging and base records in Campus Solutions.

- Import Applicants

odbc-link View	Staging Record	Record
ivgStarN	SAD_UC_I_STARN	SAD_UC_APPLREC
ivgStarA	SAD_UC_I_STARA	SAD_UC_APPLREC
ivgStarK	SAD_UC_I_IVSTK	SAD_UC_IVSTK

- Import Biographic Data

odbc-link View	Staging Record	Record
ivgDegreeContents	SAD_UC_I_IVGDGC	SAD_UC_IVGDGC

odbc-link View	Staging Record	Record
ivgEducation	SAD_UC_I_EDUCAT	SAD_UC_EDUCAT
ivgExperience	SAD_UC_I_IVGEXP	SAD_UC_IVGEXP
ivgFirstDegree	SAD_UC_I_IVGFDG	SAD_UC_IVGFDG
ivgFormQuals	SAD_UC_I_IVGFMQ	SAD_UC_FRMQUAL
ivgOtherLanguages	SAD_UC_I_IVGOLN	SAD_UC_IVGOLN
ivgStarH	SAD_UC_I_IVGSTH	SAD_UC_IVGSTH
ivgStarX	SAD_UC_I_IVGSTX	SAD_UC_IVGSTX

- Import Choices

odbc-link View	Staging Record	Record
ivgStarG	SAD_UC_I_IVSTRG	SAD_UC_IVSTARG SAD_UC_OT_CH_GT
ivgOffer	SAD_UC_I_GOFFER	SAD_UC_OFFER SAD_UC_OTH_OFF
ivgReference	SAD_UC_I_IVGREF	SAD_UC_REFERENC
ivgStatement	SAD_UC_I_IVGSTA	SAD_UC_STATEMNT
ivgStarW	SAD_UC_I_STARW	SAD_UC_STARW

- Import HESA Data

odbc-link View	Staging Record	Record
ivgStarJ	SAD_UC_I_IVGSTJ	SCC_HE_PERSON SCC_HE_INST_FLD

Importing HESA Data

A subprocess is called by the Import Applicant Data process that imports StarJ (HESA) data from UCAS and UTT when the UCAS and UTT check boxes for Import HESA Data is selected on the Import Applicant Data page.

For more information about the Import Applicant Data page, see [Entering the Applicant Import Parameters](#).

Business Rules

If you select the UCAS check box for the Import HESA Data sub-process, the UCAS view ivStarJ is imported to the staging table then processed.

The following tables are loaded if this subprocess is selected for the UCAS view:

UCAS View	Staging Table	Base Table
IVSTARJ	PS_SAD_UC_I_IVSTJ	<ul style="list-style-type: none"> Person HESA Data (PS_SCC_HE_PERSON, PS_SCC_HE_PER_FLD) HESA Instance Data (PS_SSR_HE_INSTANCE, PS_SSR_HE_INST_FLD, PS_SSR_HE_QUAL_ENT) External System ID

If you select the UTT check box for the Import HESA Data sub-process, the UTT view ivgStarJ is imported to the staging table and then processed.

The following tables are loaded if this subprocess is selected for the UTT view:

UCAS View	Staging Table	Base Table
IVGSTARJ	PS_SAD_UC_I_IVGSTJ	<ul style="list-style-type: none"> Person HESA Data (PS_SCC_HE_PERSON, PS_SCC_HE_PER_FLD) HESA Instance Data (PS_SSR_HE_INSTANCE, PS_SSR_HE_INST_FLD, PS_SSR_HE_QUAL_ENT) External System ID

General Process Logic

The following is the logic for the Import HESA Data subprocess:

- The subprocess considers the Update Matriculated Students check box setting on the UCAS Configuration page for processing External System ID records.

- The subprocess updates HESA-specific records regardless of the Update Matriculated Students check box setting to ensure that the records are synchronized with the corresponding UCAS view. Updates to HESA records are controlled by the HESA Data Import field on the UCAS Configuration page. If the Add HESA Person fields check box is selected on the UCAS Configuration page, then the subprocess creates new Disability, Nation, Ethnicity and Domicile fields. If the Add HESA Person fields check box is not selected, then the subprocess updates the existing fields but does not add new fields.
- The subprocess considers the Process Mismatched Applicants check box setting on the UCAS Configuration page.

For more information about the UCAS Configuration page, see [Setting Up UCAS and Teacher Training Options](#)

Prerequisites

The following are the prerequisites for a successful run of Import HESA Data sub-process:

- The Person HESA Data and HESA Instance Data records must have been created for each applicant whose details you want to import.

See "Creating HESA Instance and Person HESA Data Records for Students" (Student Records)
- A UCAS configuration record must be defined on the UCAS Configuration page. Refer to the above topic *General Process Logic*

Import Records to Staging Table

If you have selected the Import Live Data from UCAS check box on the UCAS configuration page, then records are imported from the StarJ views into the relevant staging table based on the timestamp value of each record. If the timestamp is greater than the internal timestamp for the view, then the record is imported. At the end of the Import Applicant Data process, the internal timestamp is updated with the highest timestamp of the records that have been imported.

Processing of Staging Table Records

For each staging table record with status of *New*, *Pending* or *Error*:

1. The record is matched to an existing UCAS applicant record in PS_SAD_UC_APPLREC using UCAS Personal ID and Application Code to find the EMPLID, or if applicant record is not found, then the EMPLID is selected from matching External System ID records with ID type UC or GT (depending on whether UTT or UCAS is selected on the UCAS Configuration page).
2. The imported Surname, Fnames, Birthdate and Gender values are compared with the values in the Campus Solutions primary person record. If the values are different then a message is logged. If a Surname, Fnames, Birthdate or Gender value is different and the Process Mismatched Applicants check box is selected, then the system adds a warning message to the log file (for example, "Warning: Personal ID: 0035697369, AppCode:UC01, ID:0278 - SURNAME value does not match person record") and the subprocess continues to process the staging record. If a Surname, Fnames, Birthdate or Gender value is different and the Process Mismatched Applicants check box is *not* selected, the system sets the staging record status to *Error*. does not process the record and adds a message to the log file (for example, "Processing skipped for Personal ID: 0035697369, AppCode:UC01, ID:0278 - SURNAME value does not match person record").

3. **Person HESA Data Update:** If a Person HESA Data record exists, then fields are added or updated using the incoming IVSTARJ values (see table below). The inserts/updates are done depending on the value of the HESA Data Import field on the UCAS configuration page.
4. **External System ID (SCN):**
 - External System ID records are created or updated based on the imported value.
 - Default values of 999999999 are skipped
 - For matriculated students, updates/inserts are done only if the Update Matriculated Students check box is selected.
5. **HESA Instance – Entry Profile Data Update:**
 - HESA Instance records are selected by matching from existing UCAS application choice records via the related Student Program records
 - Fields are added/updated using the incoming StarJ values (see table below) and inserts/updates are done depending on the value of the HESA Data Import field.
 - Imported entry qualifications are matched to existing records (in PS_SSR_HE_QUAL_ENR) based on TYPE, SUBJECT, YEAR and SITTING and if a record already exists, then the GRADE value is updated, otherwise a new record is created
6. Records with errors (*E*) and pending records (*P*) are retained in the staging table and can be reprocessed once errors are corrected.

Data Mapping for ivStarJ / ivgStarJ

Note that ULN, SBJQA1, SBJPCT1, SBJQA2, SBJPCT2, SBJQA3 and SBJPCT3 are not imported.

The following table shows the Person Data mapping:

StarJ Column:	Comment/Format	Staging Table Column:	Compared with (Page name - Field name)
IVSTARJ		PS_SAD_UC_I_IVSTJ	
IVGSTARJ		PS_SAD_UC_I_IVGSTJ	
Surname	Surname	SAD_UC_SURNAME	Names - Last Name (for primary name record)
Fnames	Forenames	SAD_UC_FORNAME	Names - First Name, Middle Name (for primary name record)
Birthdte	Date of Birth	SAD_UC_BIRTHDTE	Biographical Details - Date of Birth

StarJ Column: IVSTARJ IVGSTARJ	Comment/Format	Staging Table Column: PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ	Compared with (Page name - Field name)
Gender	Gender (1 = Male or 2 = Female)	SAD_UC_GENDER	Biographical Details – Gender

The following table shows the HESA Person Data mapping:

StarJ Column: IVSTARJ IVGSTARJ	Comment/Format	Staging Table Column: PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ	PS_SCC_HE_PER_FLD
Disable	<p>HESA Disability code (cvRefDis). Validated against imported HESA codes for DISABLE (To view the codes that you have imported, select Records and Enrollment, HESA Reporting, Codes and Mappings, Codes).</p> <p>Your institution may have already imported Disability values from StarK which the system will have used to create person Disability/ Impairment records.</p>	SAD_UC_DISABLE	DISABLE
Ethnic	<p>HESA Ethnicity code (cvRefEthnic). Validated against imported HESA codes for ETHNIC.</p> <p>Your institution may have already imported Ethnic values from StarH which the system will have used to create person Ethnicity records.</p>	SAD_UC_ETHNIC	ETHNIC

StarJ Column: IVSTARJ IVGSTARJ	Comment/Format	Staging Table Column: PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ	PS_SCC_HE_PER_FLD
Nation	HESA country code (cvRefNationality). Validated against imported HESA codes for NATION. Your institution may have already imported Nationality values from StarK which the system will have used to create person Citizenship records.	SAD_UC_NATIONALITY	NATION
NationD	2-digit code. Validated against imported HESA codes for NATIOND.	SAD_UC_NATIONALD	NATIOND

The following table shows the External System ID mapping:

StarJ Column: IVSTARJ IVGSTARJ	Comment/Format	Staging Table Column: PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ	Base Table — Column
SCN	Scottish Candidate Number (default is 999999999). Your institution may have already imported SCN values from StarK which the system will have used to create SCN external system ID records. The system does not use the default value 999999999 for processing StarK records.	SAD_UC_SCN	External System ID – SCN
ULN	Not currently processed – The system creates ULN external system ID as part of the initial STARN import.	SAD_UC_ULN	External System ID – ULN

The following table shows the data mapping for HESA Entry Profile:

StarJ Column: IVSTARJ IVGSTARJ	Comment/Format	Staging Table Column: PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ	HESA Base Table: PS_SSR_HE_INST_FLD
Domicile	HESA country code (cvRefAPR) Validated against imported HESA codes for DOMICILE. Your institution may have already imported APR from StarK which the system will have used to create person Residency Self-Report records.	SAD_UC_APR	DOMICILE
ParEd	1-character code. Validated against imported HESA codes for PARED.	SAD_UC_PARENTINHE	PARED
PGCEclss (UTT only)	2-digit code. Validated against imported HESA codes for PGCECLSS.	SAD_UC_PGCECLSS	PGCECLSS
Postcode	Text. No validation applied.	SAD_UC_POSTCODE	POSTCODE
Previnstz	Up to 8-digit code, default is U00000. No validation applied.	SAD_UC_PRVINST	PREVINST
Qualent3	3-character code - default is X06. Validated against imported HESA codes for QUALENT3.	SAD_UC_QUALENT2	QUALENT3
SEC	1-digit code (cvRefSocioEconomic). Validated against imported HESA codes for SEC.	SAD_UC_SOCIOECON	SEC If provided, the value for Sec2010 should populate SEC. If not, use the SEC value.
Sec2010	1-digit code. Validate against HESA codes for SEC.	SAD_UC_SEC2010	

StarJ Column: IVSTARJ IVGSTARJ	Comment/Format	Staging Table Column: PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ	HESA Base Table: PS_SSR_HE_INST_FLD
SOC2000	4-digit code (cvRefPocc). Validated against imported HESA codes for SOC2000.	SAD_UC_POCC	SOC2000
SOC2010	4-digit code. Validated against HESA codes for SOC2010.	SAD_UC_2010	SOC2010
WelBacc	1-digit code (1, 2, or 3). Validated against imported HESA codes for WELBACC.	SAD_UC_WELBACC	WELBACC
Yrllinst	Year of leaving school in YYYY format – default is 9999. No validation applied.	SAD_UC_YRLLINST	YRLLINST

The following table shows the data mapping for Entry Qualifications:

StarJ Column: IVSTARJ IVGSTARJ	Comment/Format	Staging Table Column: PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ	HESA Base Table: PS_SSR_HE_QUAL_ENT
QualType1 – 30	Text (max 6 characters). Validated against imported HESA codes for QUALTYPE.	SAD_UC_QUALTYPE1 to 30	SSR_HE_QUAL_TYPE
QualSbj1 – 30	ABL Subject Code (EBL_SUBJ in cvRefSubj). Validated against imported HESA codes for QUALSBJ.	SAD_UC_QUALSBJ1 to 30	SSR_HE_QUAL_SUBJ
QualSit1 – 30	S (Summer) or W (Winter). Validated against imported HESA codes for QUALSIT.	SAD_UC_QUALSIT1 to 30	SSR_HE_QUAL_SIT
QualGrade1 – 30	Text (max 6 characters). Validated against imported HESA codes for QUALGRADE.	SAD_UC_QUALGRADE1 to 30	SSR_HE_QUAL_GRADE

StarJ Column: <i>IVSTARJ</i> <i>IVGSTARJ</i>	Comment/Format	Staging Table Column: <i>PS_SAD_UC_I_IVSTJ PS_SAD_UC_I_IVGSTJ</i>	HESA Base Table: PS_SSR_HE_QUAL_ENT
QualYear1 – 30	4-digit Year value. No validation applied.	SAD_UC_QUALYEAR1 to 30	SSR_HE_QUAL_YEAR

Reviewing and Editing the Suspense Data

Access the Transaction Data page (**Student Admissions > UCAS Processing > Import Applicants > Transaction Data**).

Field or Control	Description
Personal ID	Displays the value imported from the StarN staging record for suspended records and from PS_SAD_UC_APPLREC for updated or added records.
Previous Surname	Displays the value from the StarN staging record for suspended records. This field does not display a Previous Surname value for updated or added records.

Possible values for the **Status** field include:

- *New ID Created:* The import process added a record with a new ID to your database when the post process was run. Or the system added a record with a new ID to your database when you clicked the Add button.
- *ID Updated:* The import process updated an existing ID record with the data from the UCAS record. Or the system updated an existing ID record with the data from the UCAS record when you selected the existing ID in the Results region and then clicked the Update button.
- *Suspended:* The import process has completed running the search/match process and indicated that the record should be held for later processing.
- *Ignore:* The import process has completed running the search/match process and indicated that the record should be ignored for any processing.
- *Error:* The import process suspends error records. The Error Messages region indicates which value is invalid. You must correct the invalid data specified by each error message before selecting the Add button or the Update button to process the record.

Note: To resolve the “First Name is required” error:

1. Enter dummy values in the **First Name** field for *both* the primary *and* preferred **Name Types**.

2. Select **Save**.
3. Select **Add** to create a new person or **Update** to match to an existing person.

Other staging statuses that you can see on the Transaction Data search page are not currently used in UCAS.

You define the logic to determine the status values in the Search/Match Setup page. For example, to give the *ID Updated* status to a record, you may have specified that if the import process does not find a matching record, then add the imported record to the tables.

The **Select a Duplicate** region displays the single or multiple matching records. The system disables the **Add** and **Update** buttons and hides the **Select a Duplicate** region if the data has been posted. Also, all the fields appear as read-only when the status is *New ID Created* or *ID Updated*.

Select a duplicate

Displays a single or multiple matching records for the imported UCAS record where the status is *suspended* or *error*.

Click the **Detail** link to navigate to the Add/Update a Person component.

<i>Field or Control</i>	<i>Description</i>
Add	Click to ignore any potential duplicates, manually add a new ID, and post the imported UCAS record to your database. When you click this button, the system posts the record and assigns an ID to the person.
Update	Click to match to an existing record and update the person record selected in the Select a Duplicate region with data from the UCAS record.
Additional Information	Click to access: <ul style="list-style-type: none"> • Person Organization Summary. When you click this link, the Person Organization Summary component opens in a new window, similar to Integrated Search Results. • Relations with Institution

National ID

National ID staging records are created for UCAS, UTT, and Apply applicants. You must select one row as the primary row.

This region becomes read-only once the system processes the constituent record and the status is updated to either “New ID Created” or “ID Updated.”

Citizenship

Citizenship staging records are created only for Apply applicants.

This region becomes read-only once the system processes the constituent record and the status is updated to either “New ID Created” or “ID Updated.”

Residency Official

Residency Official staging records are created only for Apply applicants.

This region becomes read-only once the system processes the constituent record and the status is updated to either “New ID Created” or “ID Updated.”

Residency Self Report

Residency Self Report staging records are created only for Apply applicants.

This region becomes read-only once the system processes the constituent record and the status is updated to either “New ID Created” or “ID Updated.”

Viewing, Updating and Deleting Application Staging Data

Use the Staging Data pages to view, update, or delete the suspense data in the staging tables. The following is an example of a Staging Data page.

This example illustrates the fields and controls of a Staging Data page.

UCAS StarH Staging Data

Academic Institution: PSGBR PeopleSoft University UK
Personal Id: 0073381379
Application Code: UC01

Find View All		First	1 of 1	Last
Import Status:	Pending	Timestamp: 15/05/2014 3:40:17AM		
Ethnic Code:	10			
Social Class:				
Date of change of Parental Occ:	01/11/2013 12:00AM			
Parental Occupation:	1137			
Parental Occupation 2010:	1141			
Last School Attended:	00100			
Education Leave Date:	2014			
Socio-Economic:	3			
Socio-Economic 2010:	2			

The Import Status field displays any one of the following values:

- *Error*: If the Import Applicant Data process cannot load the record into the Campus Solutions tables.
- *Imported*: If the Import Applicant Data process has loaded the record into the Campus Solutions tables.
- *New*: If the Import Applicant Data process has not loaded the record into the Campus Solutions tables.
- *Pending*: If the Import Applicant Data process load is waiting for the creation of a new person ID for the applicant.

In the UCAS and UTT StarA Staging Data search pages, the Country Code search field searches both the Correspondence Country and the Home Country values loaded from the StarA views. The search results therefore display records that have a matched search value in either the Correspondence Country field or Home Country field or both fields. For example, if you enter NLD in the Country Code search field, the system displays records that have NLD as either the Home Country or Correspondence Country or both. It is recommended that you use the Contains option when searching using this field.

The staging data pages can display data from either the Unicode views or the standard views. For example, if you have selected the Unicode check box on the UCAS Configuration page, the StarA Staging Data page displays the ivStarAU data. Conversely, if you have not selected the Unicode check box on the UCAS Configuration page, the StarA Staging Data page displays the ivStarA data.

Defining a Timestamp for Re-importing Data

Access the Internal Timestamp page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Timestamps**).

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

Internal Timestamp

Academic Institution: PSGBR PeopleSoft University UK

System: UCAS

View: ivQualification

Timestamp: 13/05/14 12:00:00AM

Override:

Last Run Timestamp: 09/12/13 12:00:00AM

Records Added: 305

Records Amended:

Records Deleted:

<i>Field or Control</i>	<i>Description</i>
Timestamp	Displays the highest UCAS timestamp for the view when it was last imported.
Override	<p>Specify an override date if you want to reload a particular view. After specifying the override date, run the import process. The import process then imports the UCAS view records that have a timestamp of on and after the specified override date. The default system time for the specified override date is 00:00:00.</p> <p>After the import process finishes, the system sets the Override field value to blank.</p>
Last Run Timestamp	Displays the latest timestamp used by the import process when it was last run.
Records Added	Displays the number of records that the import process added when the process last ran.
Records Amended	Displays the number of records that the import process modified when the process last ran.

<i>Field or Control</i>	<i>Description</i>
Records Deleted	Displays the number of records that the import process deleted when the process last ran.

The following scenario describes how the Internal Timestamp page displays its field values:

1. You have already imported records for a view that has UCAS timestamps up to and including July 31, 2008. Therefore, the **Timestamp** field on the Internal Timestamp page displays the date *July 31, 2008*.
2. You now want to re-import data for the view that UCAS has modified and added on or after May 31, 2008, 12 AM.
3. On August 4, 2008 enter an override date of May 31, 2008 in the Internal Timestamp page and run the Import Applicant Data process.
4. After the Import Applicant Data process completes importing the data, the system sets the **Override date** field as blank and sets the **Last Run Timestamp** field as *May 31, 2008* because May 31, 2008 was the override timestamp date that the system used when the process was run.
5. The Internal Timestamp page displays the number of records that the import process added, amended, and deleted on August 4, 2008.
6. The **Timestamp** field on the Internal Timestamp page still displays the date *July 31, 2008* if no records were found in the UCAS view with timestamps greater than July 31. If the import process imported records in the UCAS view that had a timestamp of August 1, 2008, then the **Timestamp** field displays the date *August 1, 2008*.

Reviewing Imported UCAS and UTT Applications and Applicant Data

This section provides an overview of reviewing the imported admissions data and discusses how to review the imported admissions data.

Understanding Reviewing Imported UCAS and UTT Applications and Applicant Data

After you load the UCAS applicant data into the Campus Solutions tables, use the UCAS Applications, UTT Applications, and Apply Applications components to review the imported applications and applicant data. Refer to the ODBC-link Technical Manual for information about the fields displayed on the UCAS Applications and UTT Applications components.

These components also enable you to view and maintain the Campus Solutions admission application record for the imported UCAS, UTT, or Apply application. For example, you can click the admission application number link on the Choices grid of the UCAS Applicant Summary to navigate to the Maintain Applications component. Use the Maintain Applications component to maintain the Campus Solutions admission application record for the imported UCAS application.

For more information about the Maintain Applications component, see [Updating Applications](#)

The UCAS Applications, UTT Applications, and Apply Applications components also enable you to view and maintain the person records that the import process creates for the applicants. For example, you can click the Personal Information link on any page of the UCAS Applications component to navigate to Campus Community's Add/Update a Person component. Note that the import process creates various other personal information records, such as Citizenship and Passport Data records, Impairment records, and Residency records, that you can review using the Campus Community menus.

See the product documentation for PeopleSoft Campus Community Fundamentals.

The applicant summary pages of the UCAS and UTT components displays a decision entry link that enables you to navigate to a decision entry/update page where you can enter or update a decision for the imported application. When you click this link, the system displays the Initial Decision Entry page if a decision record does not exist for the UCAS or UTT application. If a decision record does exist for the UCAS or UTT application, the system displays the Decision Processing page.

For more information about the initial decision entry and decision processing pages for UCAS and UTT, see [Processing Imported UCAS and UTT Applications and Applicant Data](#)

When a service indicator is assigned to a person ID, the corresponding negative or positive service indicator button appears on all the pages of the UCAS Applications component or UTT Applications component for that person ID.

See "Understanding Service Indicators" (Campus Community Fundamentals)

Note that UCAS and UTT application search pages enforce application center security. The system restricts the search results on the UCAS and UTT decision pages based on the application centers defined for the user (Set Up SACR, Security, Secure Student Administration, User ID, Application Center Security). You can view the UCAS or UTT application only if your User ID has access to the application center of the related Campus Solutions application. For example, suppose that user ID SATRN11 does not have access to the UGRD application center. In such a case, the UCAS Applications page does not allow SATRN11 to access an application associated with the UGRD application center.

See "Setting Security for Application Centers" (Campus Solutions Application Fundamentals)

The system applies the same application center security to UCAS and UTT application pages and the Maintain Applications component.

Pages Used to Review Imported UCAS and UTT Applications and Applicant Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
UCAS Applicant Summary	SAD_UC_APPL	Student Admissions > UCAS Processing > UCAS Applications > UCAS Applicant Summary	View the imported UCAS applicant record and data from ivStarC and ivStarK application and applicant data. View a summary of the application choices for your institution, application status, and applicant biographical details.

Page Name	Definition Name	Navigation	Usage
Choices	SAD_UC_CHOICE_DTL	Student Admissions > UCAS Processing > UCAS Applications > Choices	View the applicant's imported application choices (ivStarC data) and the related Campus Solutions application records.
Statements	SAD_UC_STATEMENTS	Student Admissions > UCAS Processing > UCAS Applications > Statements	View the applicant's imported ivStatement data.
References	SAD_UC_REFERENCES	Student Admissions > UCAS Processing > UCAS Applications > References	View the applicant's imported ivReference data.
Qualifications	SAD_UC_FRMQUAL	Student Admissions > UCAS Processing > UCAS Applications > Qualifications	View the applicant's imported ivFormQuals and ivStarPQR data.
Unit Results	SAD_UC_IVUNRS_SP	Student Admissions > UCAS Processing > UCAS Applications > Qualifications > Subject Detail > Unit Results	View the applicant's imported ivUnitResults data.
Qualification Summary	SAD_UC_QUAL_SUMM	Student Admissions > UCAS Processing > UCAS Applications > Qualification Summary	View the applicant's imported ivQualification and ivStarK data.
Education	SAD_UC_EDUCAT	Student Admissions > UCAS Processing > UCAS Applications > Education	View the applicant's imported ivEducation data.
Employment	SAD_UC_IVEMPL	Student Admissions > UCAS Processing > UCAS Applications > Employment	View the applicant's imported ivEmployment data.
Preparatory Activities	SAD_UC_IVPREP	Student Admissions > UCAS Processing > UCAS Applications > Preparatory Activities	View the applicant's imported ivPrepActivities data .
HESA Data	SAD_UC_HESA_DTL	Student Admissions > UCAS Processing > UCAS Applications > HESA Data	View the applicant's imported ivStarH and ivStarK HESA details.

Page Name	Definition Name	Navigation	Usage
UTT Applicant Summary	SAD_UC_GTAPPL	Student Admissions > UCAS Processing > UTT Applications > UTT Applicant Summary	View the imported UTT applicant record and the imported ivgStarG and ivgStarK application and applicant details. View a summary of the application choices, application status, and applicant biographical details.
Choices	SAD_UC_CHOICEGT_DT	Student Admissions > UCAS Processing > UTT Applications > Choices	View the applicant's imported application choices (ivgStarG data) and the related Campus Solutions application records. Check whether the Import Applicant Data process has marked the application choice as clearing application. The process marks the application choice as clearing if ClearingStatus from ivgStarK is 2 (under consideration by institution) or 3 (accepted in clearing) and the ivgStarG Round Number is equal to or greater than the ivgStarK Round Number.
Statements	SAD_UC_STATEMENTS	Student Admissions > UCAS Processing > UTT Applications > Statements	View the applicant's imported ivgStatement data.
Qualifications	SAD_UC_FRMQUAL	Student Admissions > UCAS Processing > UTT Applications > Qualifications	View the applicant's imported ivgFormQuals data.
References	SAD_UC_REFERENCES	Student Admissions > UCAS Processing > UTT Applications > References	View the applicant's imported ivgReference data.
Degree Details	SAD_UC_DEG_DTLS	Student Admissions > UCAS Processing > UTT Applications > Degree Details	View the applicant's imported ivgFirstDegree and ivgDegreeContents data.
Experience	SAD_UC_IVGEXP	Student Admissions > UCAS Processing > UTT Applications > Experience	View the applicant's imported ivgExperience and ivgExperienceU data.

Page Name	Definition Name	Navigation	Usage
Other Languages	SAD_UC_IVGOLN	Student Admissions > UCAS Processing > UTT Applications > Other Languages	View the applicant's imported ivgOtherLanguages data.
Education	SAD_UC_EDUCAT	Student Admissions > UCAS Processing > UTT Applications > Education	View the applicant's imported ivgEducation data.
HESA Details	SAD_UC_HESA_GT_DTL	Student Admissions > UCAS Processing > UTT Applications > HESA Details	View the applicant's imported ivgStarH and ivgStarK HESA details.
Biographical Details	SCC_BIO_DEMO_PERS	Click the Personal Information link on any page of the UCAS Applications component (SAD_UC_APPL) or the UTT Applications component (SAD_UC_GTAPP). Campus Community > Personal Information > Add/Update a Person > Biographical Details	View or update the imported ivStarN, ivStarA, ivgStarA, and ivgStarN applicant biographical data. Biographical data includes details such as applicant name, birth date, marital status, and address.
Application Program Data	ADM_APPL_PROG_ENT	Click the Maintain Applications link on the UCAS Applicant Summary page or the UTT Applicant Summary page. Student Admissions > Application Maintenance > Maintain Applications > Application Program Data	View or edit the Campus Solutions program and plan data pertaining to the imported application.
External Education	SAD_EXT_EDUCATION	Records and Enrollments > Transfer Credit Evaluation > External Education	View the applicant's school information imported from ivStarK. The imported school record includes the attendance type (academic load).
Apply Application	SAD_UC_APPL_PG	Student Admissions > UCAS Processing > Apply Applications >	View the imported Apply applicant and application records.

Reviewing the Imported UCAS Applications and Applicant Data

Access the UCAS Applicant Summary page (**Student Admissions > UCAS Processing > UCAS Applications > UCAS Applicant Summary**).

This example illustrates the fields and controls on the UCAS Applicant Summary page (1 of 3). You can find definitions for the fields and controls later on this page.

UCAS Applicant Summary															
Choices		Statements		References		Qualifications		Qualification Summary		Education		Employment		Preparatory Activities	
Name: Miquel Santiago				ID: 1658				Date of Birth: 08/22/1985							
Academic Institution: PSGBR				PeopleSoft University UK											
Personal Id: 1473279953				Personal Information											
Application Code: UC01				Application Year: 2022											
Application Status															
Application Date: 02/01/2021				<input type="checkbox"/> Late Application				<input type="checkbox"/> Choices All Transparent							
Withdrawn				Withdrawn Date											
Status: 10 Referred				Extra Status: Eligible for Extra											
Adjustment Status				Registration Date				Expiry Date							
EAS: Applied through Apply				Fee Level: Multiple Fee											
Choices															
Personalize Find First Last															
Choice Number	UCAS Course	UCAS Course Name	UCAS Campus	Entry Year	Entry Month	Entry Point	Decision	Reply	Adjustment	Choice Details	Maintain Applications	Decision Entry			
1	C100	BSc/Biol-2019	*	2022	9	1				Choice Details	00026958	Decision Entry			
2	F100	BSc/Chem	*	2022	9	1				Choice Details	00032604	Decision Entry			
Other Institution Choices															
Personalize Find View All First 1-3 of 5 Last															
Choice Number	Institution Code	Institution Name	UCAS Course	Entry Year	Entry Month	Entry Point	Decision	Reply	Summary Condition	Offer Text					
1	Z80	Oracle Education systems	C100	2022	9	1				Offer Text					
2	Z80	Oracle Education systems	F100	2022	9	1				Offer Text					
3	M20	The University of Manchester	C100	2022	9	1				Offer Text					

This example illustrates the fields and controls on the UCAS Applicant Summary page (2 of 3). You can find definitions for the fields and controls later on this page.

▼ Biographical Details

School	12405	Gosforth Academy	Last Education	12405	Gosforth Academy
Fee Payer	01	Private finance	UK Entry Date		
Residential Category	1	UK Citizen or EU National	Student Visa Study	Yes	
Worked/Lived in EU	Yes		Parent/Spouse EU	No	
Domicile (APR)	102	Bristol	Settled or Pre-Settled	Yes	
Nationality	000	UK national	Country of Birth	000	United Kingdom
Passport Number	1004589787877		Dual Nationality	609	Australian
Place Issued	Melbourne		<input checked="" type="checkbox"/> Student Visa Required		
Issue Date	01/01/2015		Expiration Date	12/31/2024	
Disability	A	No disability	<input checked="" type="checkbox"/> Criminal Records Declared		
Criminal Conviction	No				
Special Needs					
Support Arrangements	My support arrangements				
Unavailable	From 5th July until the 1st August				
Preferred First Name	Miquel		Previous Surname		
Nominee Name			Nominee Relationship		
Diploma	Taking Progression Diploma				
Cambridge PreU	Taking Pre-U Diploma				
Principal Learning	Taking Principal Learning				
Expected Qual Level	B	Below degree level			
Expected Qual Code	P50	A/AS level			
Attained Qual Code	P50	A/AS level			

This example illustrates the fields and controls on the UCAS Applicant Summary page (3 of 3). You can find definitions for the fields and controls later on this page.

▼ Identification

IELTS Reference Number
ISA Reference Number
National Insurance Number
Scottish Candidate Number
Nursing & Midwifery PIN Number
TOEFL Reference Number

The values in the **Application Status** and the **Biographical Details** group boxes come from ivStarK.

The system selects the Criminal Record Declared check box if any of the choice records associated with the applicant has a declared criminal record.

Reviewing Imported Apply Applications and Applicant Data

Access the Apply Application page (**Student Admissions > UCAS Processing > Apply Applications**).

This example illustrates the fields and controls on the Apply Application page (1 of 5). You can find definitions for the fields and controls later on this page.

Apply Application

ID 3792
First Name Synthia
Last Name Schuppe
Academic Institution PeopleSoft University UK
Candidate ID C12217
Reference PP2396
Application ID 14605

Date of Birth 10/20/1961

Cycle 2021
Last Update 04/20/2021 12:57:45AM

Expand All
Collapse All

Application
Find | View All
First 1 of 3 Last

Effective Date 05/04/2021
Provider WY6 West Kuhn Academy
Course Code QRMI Biomedical Science
Study Mode full_time
Entry Year 2021
Application Number 00048050

Application Status Offer
Site Code GZUBX
Application Phase apply_1
Entry Month 3
CAS Details(0)

Submitted 04/13/2021
Last Update 04/22/2021 11:10:43AM

Reject by Default 05/09/2021
Withdrawn Date

Conditions
Disclosure and Barring Service (DBS) check
Fitness to Teach check

Offer Date 04/22/2021
Offer Accepted Date
Rejection Date

Offer Declined Date
Recruited Date

Notes
Find | View All
First 1 of 1 Last

*Effective Date 05/24/2021
*Effective Sequence 1

*Notes

2000 characters remaining

Action Required

Outcome Code

986

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This example illustrates the fields and controls on the Apply Application page (2 of 5). You can find definitions for the fields and controls later on this page.

Contact	
Email Address	synthia.schuppe535@example.com
Phone Number	07550 391799
Address Line 1	57304 Wilkinson Isle
Address Line 2	Murrayland
Address Line 3	Berkshire
Address Line 4	
Postcode	UK0 0XH
Country	United Kingdom

Candidate	
Nationality	United Kingdom
Dual Nationality	United States
Domicile	Kosovo
UK Residency Code	A
Fee Payer	02 SLC,SAAS,NIBd,EU,ChI,IoM
UK Residency Status	UK Citizen
Interview Preferences	Tempore dolorum ducimus. Doloribus deleniti accusamus. Non rerum veniam. Architecto ab accusamus. E.
English Main Language	No
English Language Qualification	Quos dolorum voluptas. Voluptatum qui ea. Quod exercitationem modi. Et magnam mollitia. Ut quod esse. Tenetur ut nemo. Amet dolorem deleniti. Eveniet molestiae unde. Quis sit ut. Similique eaque culp.
Disability Disclosure	Illum qui numquam. Quia qui voluptatem. Voluptas ut est. Fuga eius dolor. Adipisci consequatur possimus. Totam nisi quae. Sed esse sequi. Voluptates quaeat ad. Odit occaecati recusandae. Sint sed voluptates. Nobis qui sit. Voluptatum laboriosam est. Et est reiciendis. Expedita numquam facilis. Con.
Safeguarding Status	no_safeguarding_issues_to_declare
Safeguarding Details	
Further Information	Nesciunt pariatur modi. Aut ab numquam. Assumenda non velit. Est doloremque officii. Est expedita error. Dolores saepe quo. Tenetur voluptates quia. Eum voluptatem aut. Aut assumenda distinctio. Magnam alias accusamus. Distinctio nam consequatur. Quae pariatur ducimus. Deserunt consequatur asperio.

This example illustrates the fields and controls on the Apply Application page (3 of 5). You can find definitions for the fields and controls later on this page.

Qualifications

Degree							Personalize	Find	View All	First	1 of 1	Last
Qualification ID	Type	Subject	Start	Year	Grade	Institution				Equivalency	HESA Data	
66986	Doctor of Civil Law	Security policy	2021	1964	Lower second-class honours (2.2) (Predicted)	The University of Glasgow, GB				Details	Details	

GCSE or equivalent							Personalize	Find	View All	First	1-3 of 3	Last
Qualification ID	Type	Subject	Year	Grade		Equivalency						
66987	gcse	maths		1993	C (Predicted)					Details		
66988	gcse	english		2015	A (Predicted)					Details		
66989	gcse	science		2013	C					Details		

Missing GCSEs Explanation

Other						Personalize	Find	View All	First	1-3 of 3	Last
Qualification ID	Type	Subject	Year	Grade							
66990	A level	Biology		1968	A						
66991	A level	Chemistry		1961	E (Predicted)						
66992	A level	Physics		1972	C						

Personal Statement

Why do you want to become a teacher?: Est voluptatem aliquid. Perferendis impedit accusamus. Enim et non. Mollitia odit quas. Distinctio autem incidunt. Tenetur nobis quis. Velit exercitationem sed. Nihil excepturi ea. Porro quia consequatur. Excepturi quia nesciunt. Debitis quia et. Minus ut dolor. Delectus facilis ipsum. Reprehenderit qui optio. Illo sequi reiciendis. Aut natus modi. Assumenda exercitationem est. Sequi sunt ut. Eius doloremque consectetur. Ullam unde est. Aut corporis aliquid. Architecto cumque eveniet. Nam ut ev.

What is your subject knowledge?: Quis et quia. Consequatur perferendis sunt. Soluta cumque est. Voluptas et nisi. Saepe modi fugiat. Enim et a. Est voluptatem ut. Perferendis quia cupiditate. Est libero et. Nemo ut dicta. At magni suscipit. Quasi eum necessitatibus. Beatae at amet. Et quidem corporis. Beatae voluptatum modi. In si.

This example illustrates the fields and controls on the Apply Application page (4 of 5). You can find definitions for the fields and controls later on this page.

Work History

Jobs

Find | View All | First | 1 of 2 | Last

Role Teaching Assistant
Experience ID 31070

Organisation Ironston High
Working with Children No

Commitment full_time

Description Working pattern: Modi qui dignissimos. Sed off.
Description: Temporibus facere esse. Quis consequatur molestias. Deleniti cumque maxime. Quia aut corrupti. Ut velit repellat. Quia eligendi tempora. Blanditiis et enim. Non perspiciatis aut. Voluptatem cupiditate et. Autem quisquam est. Architecto tempore fugiat. Illo laque quo. Soluta rerum deleniti. Esse nec

Start Date March 2016

End Date March 2017

Work History Break August 2018 to July 2020: Veritatis nihil assumenda ea ea iure eligendi dolores est accusamus enim et ut rerum illum at reprehenderit non minima fugiat animi voluptatem modi occaecati nostrum ullam quia vel eum laudantium labore est aut optio omnis sequi quo et sed esse quibusdam ut repellendus officiis quae ex odit incidunt deserunt qui ipsam dolore veniam consequatur est et incidunt sit ut amet non velit omnis qui libero aut excepturi impedit at id adipisci esse magnam dolorum voluptatem sit consequatur cumque aliquid voluptas facere illo quia in eos et itaque in doloribus sunt quiaerat consequatur sint eum rerum molestias voluptatem enim quasi saepe quia id voluptatibus non

Volunteering

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

Role Teacher
Experience ID 31072

Organisation Falconholt High
Working with Children Yes

Description Working pattern: Quia est eius. Dolorem volupt.
Description: Hic modi ut. Ex consequatur maxime. Quasi enim sed. Impedit ut recusandae. Ut omnis at. Possimus repellendus temporibus. Necessitatibus nihil molestias. Quia non cupiditate. Quis et blanditiis. Aspnamur similique error. Fugit qui est. Quia culpa nihil. Atque a officia. Id eligendi velit. Sint ead

Start Date January 2006

End Date

This example illustrates the fields and controls on the Apply Application page (5 of 5). You can find definitions for the fields and controls later on this page.

References

First Referee

Janine Stracke

Email Address

c47fa23886@example.com

Referee Type

character

Relationship

Nam sed dolor. Dicta minus laboriosam. Tempore quaerat rerum.

Reference

You are awesome

Reference ID

41715

Last Update

04/20/21 12:57:45AM

Safeguarding Concerns

No

Second Referee

Deidra Fay

Email Address

dadde47adf@example.com

Referee Type

professional

Relationship

Velit numquam commodi. Molestias beatae sint. Totam et laboriosam.

Reference

You are awesome

Reference ID

41716

Last Update

04/20/21 12:57:45AM

Safeguarding Concerns

No

Field or Control	Description
Personal Information	This link appears if the user viewing this has security access to the component.
Academic Institution	This doesn't appear if there's only one active academic institution record (Set Up SACR >Foundation Tables >Academic Structure >Academic Institution Table).

Unlike UTT pages, Name and Date of Birth references the values in SAD_UC_APPLREC rather than the person record. This allows you to review any differences between records.

You may see positive or negative service indicator icons on the page. If you select either icon, the Manage Service Indicators page appears.

Application

This region is similar to the Choice Details region on the **UTT Applications >Choices** page and displays details from the most recent effective-dated row for the choice from SAD_UC_IVSTARG and any associated offer conditions (SAD_UC_ACOND). If Include History is selected, you can scroll through previous rows to view changes to the application.

Notes

The fields in this region are similar to those on the UCAS Confirmation Enquiries page.

This region displays the most recent notes record for the choice from SAD_UC_APPNOTES. If there isn't any existing notes record, then a new record is displayed with Effective Date and Effective Sequence populated, and the rest of the fields are blank.

You can add a new notes record or delete an existing one.

Note: Unlike the UCAS Confirmation Enquiries page, Action Required and Outcome Code are always optional.

Contact

In this region, you see the most recent applicant record (SAD_UC_APPLREC).

Candidate

In this region, you see the most recent applicant (SAD_UC_APPLREC) and biographical (SAD_UC_IVGSTK) records.

If **English Main Language** = *Yes*, then **Other Languages** appears. Otherwise, **English Language Qualification** appears.

Qualifications

In this region, you see the most recent qualification records (SAD_UC_AQUAL).

Personal Statement

In this region, you see the most recent statement record (SAD_UC_STATEMNT).

Work History

In this region, you see the most recent work experience records (SAD_UC_IVGEXP).

References

In this region, you see the most recent reference records (SAD_UC_REFERENC).

Processing Imported UCAS and UTT Applications and Applicant Data

This section provides an overview of processing the imported admissions data, and discusses how to:

- Define conditions for an offer.
- Review key UCAS application information.
- Add attachments and review 3C information for UCAS application.
- Delete incorrect UCAS applicant records.
- Enter an initial admission decision for a UCAS application choice.
- Enter or update an admission decision for a UCAS application choice.
- Enter a decision for multiple UCAS application choices.

- Enter or update a decision for Apply applications.
- Approve or reject a UCAS decision.
- Approve or reject multiple UCAS decisions.
- Determine whether applicants satisfy the offer conditions.
- Enter or update a UCAS Confirmation decision.
- Enter multiple UCAS Confirmation decisions.
- Approve or reject a UCAS Confirmation decision.
- Approve or reject multiple UCAS Confirmation decisions.
- Enter a decision to release an applicant into Clearing.
- Approve or reject the Release into Clearing decision.
- Enter UCAS Clearing and Adjustment details.
- Review and update UCAS qualifications.
- Generate, export, and update UCAS and UTT transactions
- Review UCAS transactions.
- Review UCAS Clearing and Adjustment transactions.
- Handle UCAS applicant enquiries.
- Review key UTT application information.
- Add attachments and review 3C information for UTT application.
- Delete incorrect UTT and Apply applicant records.
- Enter an initial admission decision for a UTT application choice.
- Enter or update an admission decision for a UTT application choice.
- Enter a decision for multiple UTT application choices.
- Enter or update a decision for Apply applications.
- Approve or reject a UTT decision.
- Approve or reject multiple UTT decisions.
- Enter or update a UTT Confirmation decision.
- Enter multiple UTT Confirmation decisions.
- Approve or reject a UTT Confirmation decision.
- Approve or reject multiple UTT Confirmation decisions.

- Enter UTT Clearing details.
- Review and update UTT qualifications.
- Generate, export, and update UCAS and UTT transactions.
- Post decisions for Apply applications.
- Review UTT transactions.
- Review UTT Clearing transactions.

Understanding Processing Imported UCAS and UTT Applications and Applicant Data

After you import and review the applicants and their applications, delete any applicant records that UCAS has sent in error or UCAS has cancelled. The UCAS ivStarW view and the UTT ivgStarW view contain the data related to applicants and application choices that have been sent to UCAS by mistake or subsequently cancelled at UCAS. When you use the Import Applicant Data process to import the applications and applicant data, the import process also imports the data from these two views. Use the Remove Wrong Applicants components to review the ivStarW and ivgStarW data and delete them from your database. You can also use the Remove Wrong Applicants components to manually un-match an applicant record which is incorrectly matched to an existing person record.

After reviewing and removing incorrect applicant records, use the Decision Processing or Initial Decision Entry pages to enter admission decisions for the remaining applications. The UCAS and UTT Initial Decision Entry pages require less data entry as compared to the Decision Processing pages for making an admission decision. You can use the Initial Decision Entry pages for the quick entry of standard decisions. If decision approval is set up, use the Decision Approval pages to approve the decision.

Next, your institution communicates the admission decisions and approvals to UCAS. The following steps describe how the Campus Solutions system communicates this data to UCAS:

1. After entering or updating a decision, run the Transaction Processing process to generate a transaction . If decision approval is set up, use the Decision Approval page to approve the decision before you generate a transaction.
2. Use the Transaction Processing process to export transactions to the TRANIN view at UCAS and to import error codes once UCAS has processed the transactions. Transactions that the system loads into TRANIN include the transaction ID generated by UCAS and an error code of -1 to indicate that UCAS has not yet processed the transaction. Once UCAS fully processes the transaction, the error code is either 0 (success) or is a code that UCAS defines in the cvRefError reference data view.

UCAS runs a batch process approximately every five minutes to process incoming transactions. As a result, the Campus Solutions system may delay in reading the error codes and return1 value from TRANIN and updating its transaction records.

The following (1 and 2) describes how the system processes standards decisions which are not related to Confirmation or Clearing:

- 1.) When you run the Transaction Processing process for UCAS applications, the process selects each UCAS decision record where the system code equals U, transaction flag equals Y, and the approval status is either Approved or Not Required. For each decision record:

- If the latest transaction for an application has a transaction type other than LD, LA, LC, RA, or RD, the process does not generate a transaction. In these cases, you should use the UCAS Transactions page to manually create a transaction.
- If there is no previous transaction for an application and you had entered C (Conditional Offer), U (Unconditional Offer), W (Withdrawal) or R (Rejection), the process generates a LD (initial decision) transaction.
- If the most recent transaction is LD or LA (amended decision):
 - If the application is not UF and either the new decision value is different from the decision value of the existing transaction or the course details have changed, the process generates a new LA transaction.
 - If the application is UF and the new decision is equal to withdrawal, the process generates a RW transaction.
 - If the application is UF and any of the course details of the decision have changed, the process generates a RA transaction.
- If the most recent transaction is LC and there is no previous transaction, the process generates an LD transaction. If there is a previous transaction then the process generates a LA transaction.
- When the process completes processing the decisions, it sets the transaction flag for the decision record to *N* to indicate that transaction processing has completed.

2.) When you run the Transaction Processing process for UTT applications, the process selects each UTT decision record where the system code equals G, transaction flag equals Y, and the approval status is either Approved or Not Required. For each decision record:

- If the latest transaction for an application has a transaction type other than LD, LA, LC or RA, the process does not generate a transaction. In these cases, you should use the UTT Transactions page to manually create a transaction.
- If there is no transaction for an application and you enter I, C, U, W, R, E, M, S, or G decision, the system generates a LD (initial decision) transaction.
- If the most recent transaction is LD or LA (amended decision), then processing is same as UCAS applications and the process generates a LA, RW or RA transaction.
- When the system completes processing the decisions, it sets the transaction flag for the decision record to *N* to indicate that transaction processing has completed.

When the Transaction Processing process generates a new transaction record, it automatically updates the Campus Solutions application (linked to the UCAS application choice) with the program action and action reason values. For example, if transaction type equals LD and decision is I for a UTT application, the system looks at the program action reason mapping for the decision Interview you have set up in the UTT Program Actions page. The system then attaches the program action and action reason to the application. But in Schools Direct applications, that is, when the local institution is identified as the Accrediting Provider in ivgStarG, the Import Applicant Data process makes direct updates to the corresponding Campus Solutions applications based on updated decision values in ivgStarG.

Use the Standard Offers page to define conditions for an offer to send to UCAS. For example, you can define a condition *three A Levels at Grade B* that can be used for multiple application decisions.

Subsequently, you can enter this condition in the Decision Processing pages when making a conditional offer. When you generate transactions for the conditional offers, the system includes this condition in the transactions to send to UCAS.

The following example is a scenario for UCAS application processing.

Enter a decision and generate a transaction:

1. Use the Initial Decision Entry pages to enter a decision. For example, enter a decision of unconditional offer.
2. Run the Transaction Processing process to generate the transaction for the unconditional offer decision. (Select the **Generate Transactions** check box on the Transaction Processing page.)
3. Use the UCAS Transactions page to review the transaction. For example, because you entered a decision of Unconditional Offer, the Transaction Details section of the page displays the Transaction Type LD and Decision of U.

Now you want to export this decision to UCAS and also want to know that UCAS has received this transaction.

It is recommended that you first generate transactions, review the sent transactions, and then request UCAS for acknowledgement. Normally, a time delay occurs between Campus Solutions writing the transaction to UCAS and UCAS updating the transaction with an error code. Therefore, we recommend that you do not run the transaction processing process with both the **Export Transactions** and **Update Transactions from UCAS** check boxes selected. Run the transaction processing process with the **Generate Transaction** check box selected first and review the sent transactions. Then, run the transaction processing process with the **Update Transactions from UCAS** check box selected and review the transaction for acknowledgement.

1. Run the Transaction Processing process to export the applicant's LD transaction to UCAS (select the **Export Transactions** check box on the Transaction Processing page.)
2. In the UCAS Transactions page, review the exported transaction (the **Sent** check box appears as selected).
3. Run the Transaction Processing process to receive the acknowledgment from UCAS for the exported transaction (select the **Update Transactions from UCAS** check box on the Transaction Processing page).
4. Use the UCAS Transactions page to review the error code for the applicant's LD transaction sent to UCAS. The error code is 0 (success) in the UCAS Transactions page, which indicates that UCAS received the institution's decision.

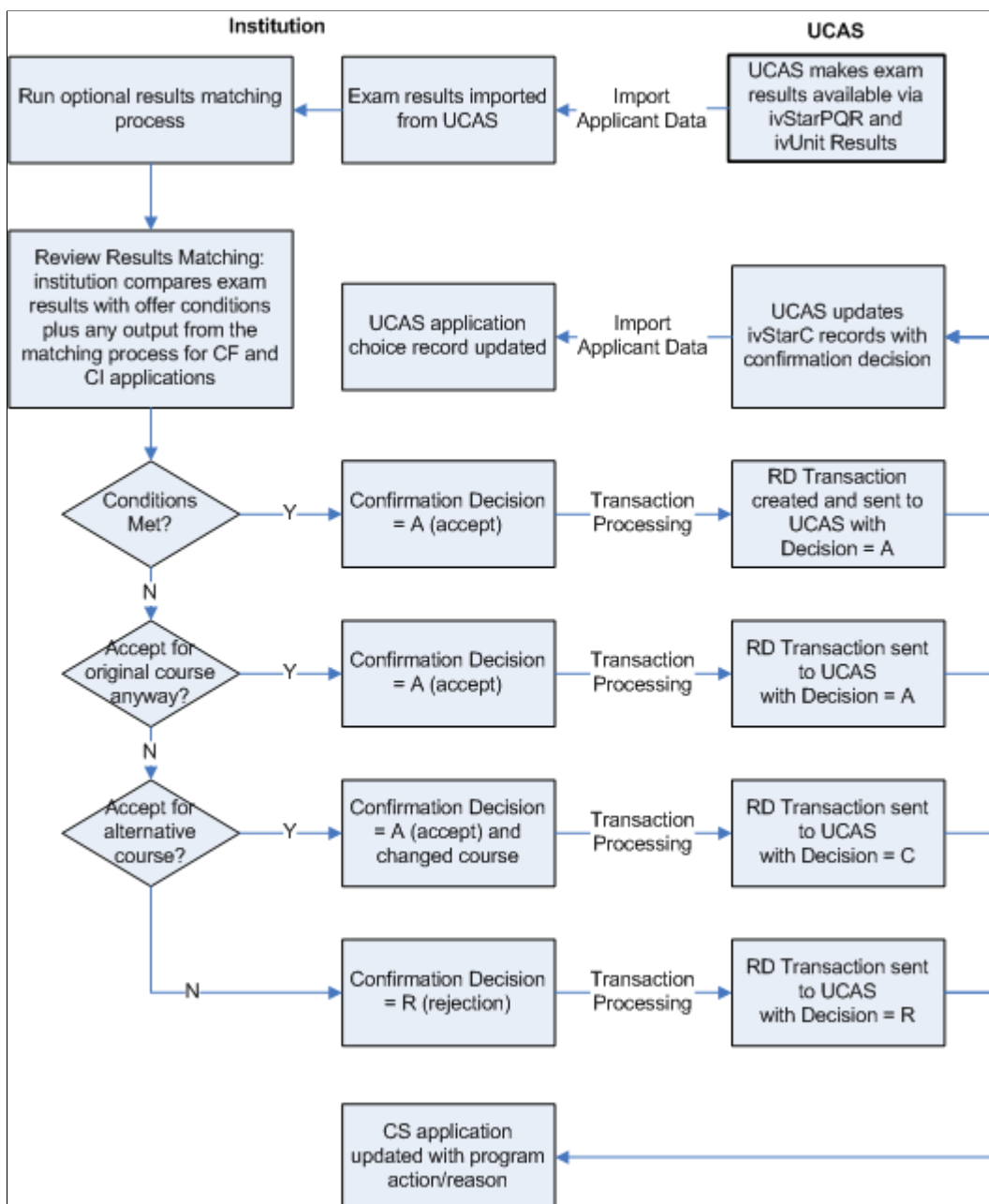
Finally, to know the UCAS applicant's response, complete these steps:

1. Run the Import Applicant Data process. If the applicant has responded to the offer, the offer response will be in ivStarC.
2. On import, Campus Solutions sets the Reply as F (for a Firm response) or I (for an Insurance response) on the UCAS Decision Processing page of the applicant if the applicant has accepted the offer. If the applicant has declined the offer, Campus Solutions sets the Reply as D.

When exam results are available, your institution will confirm conditional offers for UTT and UCAS applications:

1. For UCAS applications, make sure you have imported cvRefTariff data (by running the Import Reference Data process) if you want to use the Results/Offer Matching process to evaluate tariff offers. This step is not applicable for UTT applications.
2. Run the Import Applicant Data process to import the exam results.
3. Compare the applicant exam results with the offer conditions. You can do the comparison manually or run the Results/Offer Matching process. This process is not available for UTT applications.
4. Use the Quick Confirmation page or the Confirmation Entry page to accept or reject the conditional offer.
5. Run the Transaction Processing process to generate and export the RD transaction.

This diagram illustrates the Confirmation process flow.



The following is an example of processing the Delayed Conditional decisions:

1. Use the Decision Processing page to enter the Delayed Conditional decision for a CF application.
2. If you have selected the Conditional Offer check box on the UCAS Configuration component, use the Decision Approval page to approve this decision.
3. Run the Transaction Processing process to generate and export the RD transaction with the decision code of *D*.
4. A decision code of *D* is only valid in an RD transaction during September or October for a CF applicant. Once the results are known, use the Confirmation Entry page to confirm the DF application.
5. If you have selected the Confirmation Acceptance check box on the UCAS Configuration component, use the Confirmation Approval page to approve this decision.
6. Run the Transaction Processing process to generate and export another RD transaction for the application.

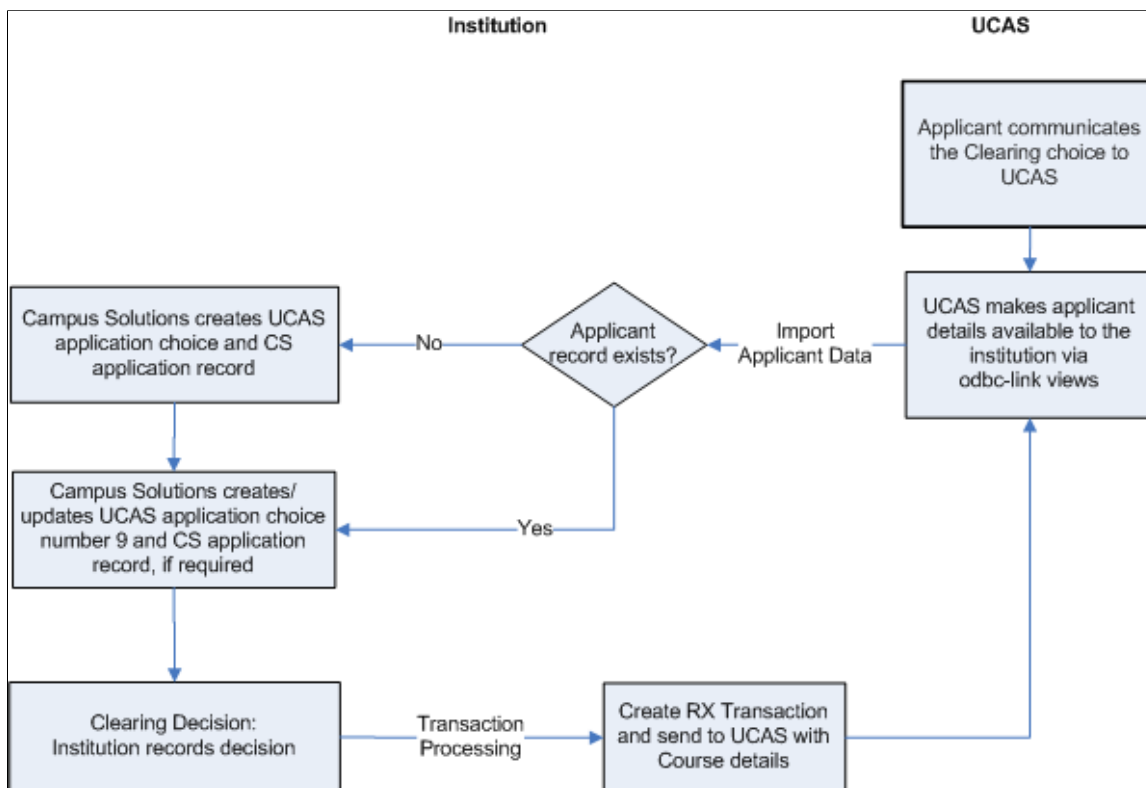
An applicant who may not have got admission in any institution is eligible for Clearing. To process Clearing applications for UCAS applicants:

1. Use the Import Applicant Data to import the Clearing application choices.
2. Use the UCAS Initial Decision Entry or the UCAS Decision Processing page to enter an admission decision for the Clearing application. To search for the Clearing applications, enter 9 in the UCAS Choice Number field of the decision search page. Note that the decision search pages do not display accepted Clearing applications (that is UCAS applications with choice number = 9 and the decision value = A).
3. Use the UCAS Enquiry Entry page to create enquiry records and record RQ Clearing transactions to request the details of a Clearing applicant. If your institution wants to offer admission to the Clearing applicant, use the UCAS Enquiry Entry page to record the RX transaction.
4. Run the Transaction Processing process to generate and export the RQ or RX transaction to UCAS. The RX transaction must have a decision value.
5. Use the Import Applicant Data process to import the application choices for Clearing if you have sent a RQ transaction.

To process Clearing applications for UTT applicants:

1. Use the UTT Enquiry Entry page to collect student contact address and exam results while the institution is negotiating with the student. The personal ID and application code values can be looked up from the cvgName UCAS view.
2. If the institution decides to accept or make a conditional offer to the student, enter the course, campus, entry year, entry month, transaction type (RX), decision (U or C) and decision maker.
3. Run the Transaction Processing process to generate and export the RX transaction to UCAS. The RX transaction must have a decision value.
4. Run the Import Applicant Data process to import the applicant data and application choices for the students you have sent RX transactions for.

This diagram illustrates an example of the Clearing process flow.



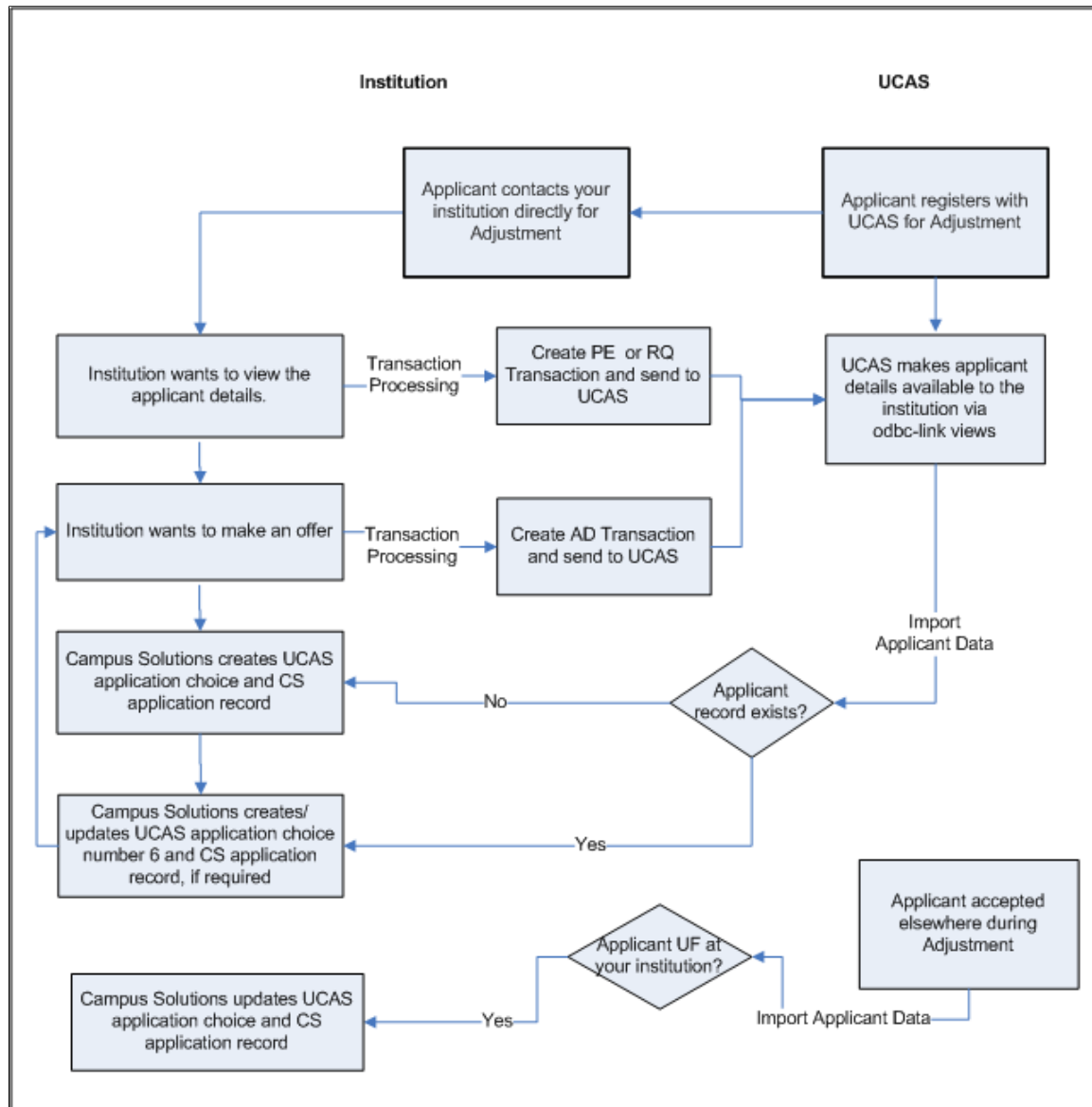
For processing Adjustment records (not applicable for UTT applications):

1. Use the UCAS Enquiry Entry page to create Adjustment records and record RQ or PE transactions. Use this page to record the AD transaction.
2. Run the Transaction Processing process to generate and export the RQ, PE, AD, LA or RA transaction to UCAS.
3. Run the Import Applicant Data process. The process imports the Adjustment application choice if you have sent an AD transaction. If you have sent a RQ or PE transaction, the process imports only Adjustment applicant data such as biographical data, and ivStarN, ivStarA and ivStarK data.

Use the UCAS Release to Clearing page to release an applicant into Clearing.

After your institution has accepted an applicant through Adjustment (that is, your institution has sent an AD transaction), the system updates the application choice to UF. If the applicant subsequently withdraws the applicant, then the institution may either release the application to clearing (RR transaction) or withdraw the applicant (RW transaction). Use the UCAS Release to Clearing page to record the RR transaction or use the UCAS Transactions page to record the RW transaction.

This diagram illustrates an example of the Adjustment initial decision process flow.



When a service indicator is assigned to a person ID, the corresponding negative or positive service indicator button appears on the UCAS or UTT decision processing pages for that person ID.

See "Understanding Service Indicators" (Campus Community Fundamentals)

Note that the UCAS and UTT processing pages discussed in this section (except the Wrong Applicant, Standard Offer, and Result/Offer Matching Process pages) enforce application center security. The system restricts the search results on the UCAS and UTT processing pages based on the application centers defined for the user (Set Up SACR, Security, Secure Student Administration, User ID, Application Center Security). You can view the UCAS or UTT application only if your User ID has access to the application center of the related Campus Solutions application. For example, suppose that user ID SATRN11 does not have access to the UGRD application center. In such a case, the UCAS Decision Processing page does not allow SATRN11 to access an application associated with the UGRD application center.

The system applies the same application center security to UCAS and UTT processing pages and the Maintain Applications component.

Related Links

"Setting Security for Application Centers" (Campus Solutions Application Fundamentals)

Pages Used to Process the Imported UCAS and UTT Applications and Applicant Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Standard Offers	SAD_UC_STD_OFF	Student Admissions > UCAS Processing > Standard Offers	Define conditions for an offer that UCAS sends to the applicant.
UCAS Application Notes	SAD_UC_APPLNOTES	Student Admissions > UCAS Processing > UCAS Application Notes	View the key information for a UCAS application choice, on a single page. Enter notes for the application choice.
3C/Attachments	SAD_UC_3C_ATTACH	Student Admissions > UCAS Processing > UCAS Application Notes > 3C/ Attachments	Add or view attachments for the Campus Solutions application record. Enter or view the 3C information for the person ID.
UCAS Wrong Applicants	SAD_UC_STARW	Student Admissions > UCAS Processing > Remove Wrong Applicants > UCAS Wrong Applicants	Review the imported applicant records from ivStarW and delete records if required. You can also use this page to un-match an applicant record that is incorrectly matched to a person record.
UCAS Initial Decision Entry	SAD_UC_DECENTRY	Student Admissions > UCAS Processing > UCAS Decision Processing > Initial Decision Entry	Enter an admission decision for a UCAS application choice.
UCAS Decision Processing	SAD_UC_DECISN	Student Admissions > UCAS Processing > UCAS Decision Processing > Decision Processing	Enter or update an admission decision for a UCAS application choice. Find out whether your institution has confirmed the applicant's admission offer or released the applicant into Clearing.
UCAS Quick Decision Entry	SAD_UC_QDEC	Student Admissions > UCAS Processing > UCAS Decision Processing > Quick Decision Entry	Enter a decision simultaneously for multiple UCAS applications.

Page Name	Definition Name	Navigation	Usage
Apply Decisions	SAD_UC_APDECISN_PG	Student Admissions > UCAS Processing > Apply Decision Processing > Apply Decisions	Enter or update a decision for Apply applications.
UCAS Decision Approval	SAD_UC_DECAPR	Student Admissions > UCAS Processing > UCAS Decision Approval > Decision Approval	Approve or reject the admission decision for a UCAS application choice.
UCAS Quick Decision Approval	SAD_UC_QDAPR	Student Admissions > UCAS Processing > UCAS Decision Approval > Quick Decision Approval	Approve or reject simultaneously the admission decisions for multiple UCAS applications.
Results/Offer Matching Process	SAD_UC_MATCH_PROC	Student Admissions > UCAS Processing > UCAS Decision Processing > Result/Offer Matching Process	<p>Match exam results with conditional offer details for Confirmation. The process determines whether the applicants have satisfied the offer conditions.</p> <p>You can run this process for all applicants in an institution, for all applicants of a particular course, or for specific applicants.</p> <p>This process is optional for confirming conditional offers. You can use the Confirmation Entry page to manually determine whether an applicant has satisfied the offer conditions.</p>
UCAS Confirmation Entry	SAD_UC_CNFDEC	Student Admissions > UCAS Processing > UCAS Decision Processing > Confirmation Entry	<p>Accept or reject the conditional offer of an applicant.</p> <p>If you have not run the Results/Offer Matching process for the applicant, manually match the applicant's exam results with the conditional offer details and indicate whether the applicant has satisfied the conditions for admission.</p>
UCAS Quick Confirmation	SAD_UC_QCONF	Student Admissions > UCAS Processing > UCAS Decision Processing > Quick Confirmation	Accept or reject the conditional offer of multiple applicants.

Page Name	Definition Name	Navigation	Usage
UCAS Confirmation Approval	SAD_UC_CNFAPR	Student Admissions > UCAS Processing > UCAS Decision Approval > Confirmation Approval	Approve or reject the Confirmation decision for an applicant.
UCAS Quick Confirmation Approval	SAD_UC_QAPR	Student Admissions > UCAS Processing > UCAS Decision Approval > Quick Confirmation Approval	Approve or reject the Confirmation decision for multiple applicants.
UCAS Release To Clearing	SAD_UC_RELDEC	Student Admissions > UCAS Processing > UCAS Decision Processing > Release to Clearing	Release an applicant into Clearing.
UCAS Release to Clearing Approval	SAD_UC_RELAPR	Student Admissions > UCAS Processing > UCAS Decision Approval > Release to Clearing Approval	Approve or reject an applicant's release into Clearing.
UCAS Enquiry Entry	SAD_UC_CLEARING	Student Admissions > UCAS Processing > UCAS Decision Processing > Enquiry Entry	Create or update an applicant's Clearing or Adjustment record. Specify whether you want the Transaction Processing process to generate an RX, RQ, PE, or AD transaction.
UCAS Qualifications	SAD_UC_IVFRMQUAL	Student Admissions > UCAS Processing > UCAS Decision Processing > Qualifications	Review and edit imported qualification and exam result records.
Decision Export	SAD_UC_AEXP_RCTL	Student Admissions > UCAS Processing > Apply Decision Processing > Apply Decisions Export	Post decisions for Apply applications.
Transaction Processing	SAD_UC_TRN_PROC	Student Admissions > UCAS Processing > Transaction Processing > Transaction Processing	Generate, export, and update UCAS and UTT transactions.
UCAS Transactions	SAD_UC_TRANIN	Student Admissions > UCAS Processing > Transaction Processing > UCAS Transactions	Review the UCAS transactions. In addition, manually add or delete transactions and set the hold flag to prevent the system from sending the transactions to UCAS.

Page Name	Definition Name	Navigation	Usage
UCAS Enquiry Transactions	SAD_UC_TRANINCLR	Student Admissions > UCAS Processing > Transaction Processing > UCAS Enquiry Transactions	Review the UCAS Clearing and Adjustment transactions that the Transaction Processing process has generated. Alternatively, manually add or delete Clearing or Adjustment transactions. Set the hold flag to prevent the system from sending the Clearing or Adjustment transactions to UCAS.
UCAS Confirmation Enquiries	SAD_UC_CONF_ENQ	Student Admissions > UCAS Processing > UCAS Confirmation Enquiries	Review a summary of the Confirmation or Clearing application choice. Also, enter notes and outcome codes for an application choice while handling applicant enquiries related to Confirmation and Clearing.
UTT Application Notes	SAD_UC_GTAPPNOTE	Student Admissions > UCAS Processing > UTT Application Notes	View the key information for a UTT application choice, on a single page. Enter notes for the application choice.
3C/Attachments	SAD_UC_GT3C_ATTACH	Student Admissions > UCAS Processing > UTT Application Notes > 3C/ Attachments	Add or view attachments for the Campus Solutions application record. Enter or view the 3C information for the person ID.
Wrong Applicants	SAD_UC_GSTARW	Student Admissions > UCAS Processing > Remove Wrong Applicants > Wrong Applicants	Review the imported applicant records from ivgStarW and delete records if required. You can also use this page to un-match an applicant record that is incorrectly matched to a person record.
UTT Initial Decision Entry	SAD_UC_GTDECENTRY	Student Admissions > UCAS Processing > UTT Decision Processing > Initial Decision Entry	Enter an admission decision for a UTT application choice
UTT Decision Processing	SAD_UC_GTDECISN	Student Admissions > UCAS Processing > UTT Decision Processing > Decision Processing	Enter or update an admission decision for a UTT application choice.

Page Name	Definition Name	Navigation	Usage
UTT Quick Decision Entry	SAD_UC_QGTDEC	Student Admissions > UCAS Processing > UTT Decision Processing > Quick Decision Entry	Enter a decision simultaneously for multiple UTT applications.
UTT Qualifications	SAD_UC_IVGFRMQUAL	Student Admissions > UCAS Processing > UTT Decision Processing > Qualifications	Review and edit imported qualification records.
UTT Decision Approval	SAD_UC_GTDECAPR	Student Admissions > UCAS Processing > UTT Decision Approval > Decision Approval	Approve or reject the admission decision for a UTT application choice.
UTT Quick Decision Approval	SAD_UC_QGTDAPR	Student Admissions > UCAS Processing > UTT Decision Approval > Quick Decision Approval	Approve or reject simultaneously the admission decisions for multiple UTT applications.
UTT Confirmation Entry	SAD_UC_GTCNFDEC	Student Admissions > UCAS Processing > UTT Decision Processing > Confirmation Entry	Accept or reject the conditional offer of a UTT applicant.
UTT Quick Confirmation	SAD_UC_QGTCONF	Student Admissions > UCAS Processing > UTT Decision Processing > Quick Confirmation	Accept or reject the conditional offer of multiple UTT applicants.
UTT Confirmation Approval	SAD_UC_GTAPR	Student Admissions > UCAS Processing > UTT Decision Approval > Confirmation Approval	Approve or reject the Confirmation decision for a UTT applicant.
UTT Quick Confirmation Approval	SAD_UC_QGTAPR	Student Admissions > UCAS Processing > UTT Decision Approval > Quick Confirmation Approval	Approve or reject the Confirmation decision for multiple UTT applicants.
UTT Enquiry Entry	SAD_UC_GTCLRING	Student Admissions > UCAS Processing > UTT Decision Processing > Enquiry Entry	Create or update an applicant's Clearing record. Specify whether you want the Transaction Processing process to generate an RX.

Page Name	Definition Name	Navigation	Usage
UTT Transactions	SAD_UC_GTTRANIN	Student Admissions > UCAS Processing > Transaction Processing > UTT Transactions	Review UTT transactions that you have sent or not sent. In addition, manually add or delete transactions and set the hold flag to prevent the system from sending the transactions to UCAS.
UTT Enquiry Transactions	SAD_UC_GTTRNCLR	Student Admissions > UCAS Processing > Transaction Processing > UTT Enquiry Transactions	Review the UCAS Clearing transactions that the Transaction Processing process has generated. Alternatively, manually add or delete Clearing transactions. Set the hold flag to prevent the system from sending the Clearing transactions to UTT.
ID Delete	RUNCTL_ID_CHANGE	Campus Community > Personal Information > ID Management > ID Delete	Delete an ID from the database after initiating the removal process of the ID in the UCAS Wrong Applicants or the Wrong Applicants pages.

Defining Conditions for an Offer

Access the Standard Offers page (**Student Admissions > UCAS Processing > Standard Offers**).

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

Standard Offers

Academic Institution: PSUNV PeopleSoft University

System: UCAS

Decision: C Conditional Offer

Offer Code: NG1

***Description:**

Line Number	Abbrev	Grade / Mark	@ or /	Subject	End /	Text		
1	GC	B	▼	ECON	▼		+	-
2	GC	B	▼	BIOL	▼		+	-
3	GC	B	▼	CHEM	▼		+	-

Comment:

Free Format:

Letter Text

This offer is subject to your obtaining
 GCE A Level
 Grade B Economic
 GCE A Level
 Grade B Biolog
 GCE A Level
 Grade B Chemistr

Transaction Code:

Summary of Conditions:

☐ Manual Matching Required
 ☒ Active

For UTT, you should enter only the interview date element in the Free Format field and not the interview time. For UCAS, you can enter both the interview date and time in the Free Format field.

You can use the Decision Code field in the Decision Processing, Initial Decision and Quick Decision pages to select a standard offer. On selecting a standard offer, the system populates the decision record with the values that you defined on the Standard Offers page.

Free Format field and the Interview decision

For Interview decisions, the value you enter in the Free Format field need not start with *DDMMYY*. You can define interview standard offers with or without date and time elements. Note that the generated Transaction Code should not be blank for Interview decisions. You must enter text in either the Comment field or the Free Format field to generate transaction code.

If the Free Format field on the Standard Offers page starts with a date in the format *DDMMYY*, then the system populates the Interview Date field in the UCAS and UTT Decision Processing and Initial Decision pages with this date. For example, suppose you have an *INT01* offer with a free format text that starts with *010100* on the Standard Offers page. In such a case, when you select *INT01* as a decision code

on the UCAS Decision Processing page, the page automatically populates the Interview Date field as *01/01/2000*.

If the Free Format field on the Standard Offers page includes a time in the format HHMM from position 8 to 11 (that is, after a hyphen - as character 7), then the system populates the Interview Time field in the UCAS Decision Processing and UCAS Initial Decision pages with this time. For example, suppose you have an *INT01* offer with a free format text that starts with *010100-1300*. In such a case, when you select *INT01* as a decision code on the UCAS Decision Processing page, the page automatically populates the Interview Date field as *01/01/2000* and Interview Time as *13:00*. UTT does not use Interview Time.

The system populates the Free Format field on the UCAS and UTT Decision Processing pages with the Free Format value from the Standard Offers page without the interview date and time elements for UCAS and without the interview date for UTT. For example, suppose you have an *INT01* offer with a free format text *010100-1300 Is your interview date and time*. In such a case, when you select *INT01* as a decision code on the UCAS Decision Processing page, the page automatically populates the Interview Date field with *01/01/2000*, Interview Time field with *13:00*, and the Free Format field with *Is your interview date and time*. The Free Format field does not appear on the Initial Decision pages but the system applies similar logic in the background to populate the Free Format field of the decision record with the free format text from the standard offer minus any interview date and time elements.

You can change the interview date and time, comment, and the free format text values on the decision pages, if required.

Reviewing Key UCAS Application Information

Access the UCAS Application Notes page (**Student Admissions** > **UCAS Processing** > **UCAS Application Notes**).

This example illustrates the fields and controls on the UCAS Application Notes page (1 of 4). You can find definitions for the fields and controls later on this page.

UCAS Application Notes
3C/Attachments

Name: Kelly Carroll **ID:** 0462 **Date of Birth:** 09/05/1987
Academic Institution: PSGBR PeopleSoft University UK
UCAS Personal ID: 0053380265 [Personal Information](#) [Applicant Summary](#)
Application Code: UC02 **Application Year:** 2014

Choice Details

Choice Number: 2 **Application Number:** 00026428 [Maintain Applications](#)
UCAS Course: L300 Sociology **UCAS Campus:** * [Choice Details](#)
Entry Year: 2014 **Entry Month:** 9 [Decision Entry](#)
Entry Point: 1 **Reply:** [CAS Details\(1\)](#)
UCAS Decision:

Application Details
Find | View All First 1 of 1 Last

Application Date: 01/05/2013 **Status:** 10
Disability: J You have two or more impairments and/or disabling medical conditions **Nationality:** 000 UK national
Country of Birth: 000 United Kingdom **UK Entry Date:** 01/01/1996
Residential Category: 1 UK Citizen or EU National **Student Visa Study:** Yes
Worked/Lived in EU: Yes **Parent/Spouse EU National:** No
Criminal Conviction: No ☒ Criminal Records Declared ☒ Student Visa Required
School: 00200 APPLY 2005, CHELTENHAM **Last School:** 00200 APPLY 2005, CHELTENHAM
Unavailable: From 5th July until the 1st August

This example illustrates the fields and controls on the UCAS Application Notes page (2 of 4). You can find definitions for the fields and controls later on this page.

Qualifications
Personalize | Find | First 1-6 of 6 Last

Qualification Details
Subject Details

Year	Month	Award Body	Type	Subject	Result	Predicted Grade
2009	5	AQA	General Certificate of Secondary Education	English	A	
2009	5	AQA	General Certificate of Secondary Education	Mathematics	B	
2009	5	AQA	General Certificate of Secondary Education	French	C	
2011	2	AQA	GCE Advanced Level	Computer Studies	Incomplete	C
2011	2	AQA	GCE Advanced Level	Mathematics	Incomplete	B
2011	2	AQA	GCE Advanced Level	English	Incomplete	A

Personal Statements
Find | View All First 1 of 1 Last

Statement: **Timestamp:** 26/08/2010 12:00:00AM
This is my personal statement in support of my application. Thanks.

This example illustrates the fields and controls on the UCAS Application Notes page (3 of 4). You can find definitions for the fields and controls later on this page.

▼ References

Find | View All First 1 of 1 Last

Referee Type: P Principal Referee

Referee Name: Mr Manager

Referee Post: Manager

Estab Name: Acme

Predicted Grades:
A:Computer Studies = C A:Mathematics = B A:English = A

Statement:
This candidate is ideally suited to the course and is highly recommended

Telephone: 01234567890

Email: test@ucas.ac.uk

Fax: 01234567890

Address Line 1: Acme Towers

Address Line 2: Acme Road

Address Line 3: Acme

Address Line 4: AA11 1AA

Postal Code:

Quals Checked: N

Full Time Count: 0

Part Time Count: 0

Timestamp: 26/08/2010 12:00:00AM

This example illustrates the fields and controls on the UCAS Application Notes page (4 of 4). You can find definitions for the fields and controls later on this page.

Contextual Data

Find | View All

First1 of 1Last

School:

Timestamp:

School Year:

Percentage Achieving 5 GCSE:

Percentage Achieving 5 SCQF:

Best 8 GCSE Performance Score:

Best 8 SCQF Performance Score:

Average QCA per Qual/Entry:

Average Tariff per Qual/Entry:

Average QCA per Qual/Stdnt:

Average Tariff per Qual/Stdnt:

Percentage FSM Entitled:

Percentage FSM Registered:

Percentage EMA:

Notes

Find | View All

First1 of 1Last

*Effective Date:

05/06/2012

*Effective Sequence:

1

*Notes:

Action Required:

Outcome Code:

User ID:

SATRN11

View Printable Page

The fields on the Notes region are similar to those on the UCAS Confirmation Enquiries page. The Automatic Save and Outcome Required settings on the UCAS Configuration page affects only the UCAS Confirmation Enquiries page and does not affect the UCAS Application Notes page.

Field or Control	Description
View Printable Page	Click to obtain a printable version of the application information.

Adding Attachments and Reviewing 3C Information for UCAS Application

Access the 3C/Attachments page (Student Admissions > UCAS Processing > UCAS Application Notes > 3C/Attachments).

This example illustrates the fields and controls on the 3C/Attachments page (1 of 2). You can find definitions for the fields and controls later on this page.

UCAS Application Notes
3C/Attachments

Name: Elvie Rosina ID: 1510 Date of Birth: 03/11/1980
Academic Institution: PSGBR PeopleSoft University UK
UCAS Personal ID: 0035843250 [Personal Information](#) [Applicant Summary](#)
Application Code: UC01 Application Year: 2011

Choice Details

Choice Number:	2	Application Number:	00025603	Maintain Applications
UCAS Course:	C100 Biology	UCAS Campus:	*	Choice Details
Entry Year:	2012	Entry Month:	9	Entry Point: 2
UCAS Decision:	Conditional Offer	Reply:	Firm	Decision Entry
CAS Details(5)				

File Attachments

Personalize | Find | View All | First 1 of 1 Last

Attachments Audit

Attached File	View	Add Attachment
	View	Add Attachment

This example illustrates the fields and controls on the 3C/Attachments page (2 of 2). You can find definitions for the fields and controls later on this page.

Checklists

Status Institution and Function

	Checklist	Item	Description	Due Date	Item Status
Edit View	UC02			11/08/2012	
Edit View	UC02	TRANS	Academic Transcripts	11/08/2012	Initiated
Edit View	UC02	PERSTA	Personal Statement	11/08/2012	Initiated

Comments

Comment Category Comment ID

	Category	Description	Function	DateTime	Sequence
Edit View					

Communications

General Info Letter Details

	Process Used	Method	Letter Code	Direction	Function	Assign Date/Time	Date Completed	Sequence
Edit View		E-Mail		Outgoing	ADMP	12/06/2012 10:11:49PM		1

File Attachments

Use this group box to add, delete and view attachments for the Campus Solutions application.

Field or Control	Description
Add Attachment	Click to access standard PeopleTools functionality to browse to a file and upload it
View	Click the link to open the attachment in a new window.

The Audit tab displays all updates to attachments, including user name and date/time.

Note that you can also use the File Attachments group box on the Application Data page of the Maintain Applications component to maintain and access the attachment data.

The 3C Group Boxes (Checklists, Comments, and Communications)

The fields on these group boxes are similar to the fields that appear on the Campus Community's checklist, comment, and communication pages. The group boxes display the records in a similar way to the Campus Community's checklist, comment, and communication summary pages.

See "Understanding Checklists" (Campus Community Fundamentals)

See "Understanding Comments" (Campus Community Fundamentals)

See "Understanding Communication Management" (Campus Community Fundamentals)

Note that the group boxes display a person ID's 3C records for only the ADMA and ADMP administrative functions. Also, these group boxes display only those 3C records where the application number in the variable data of the 3C record matches with the application choice that the Choice Details region of the page displays or if the application number value in the variable data is blank (3C records can be created without the application number value in variable data). Records linked to other application numbers are not displayed.

When you create a checklist, comment, or communication record by clicking the create button on any one of these group boxes, the system by default:

- Populates the Administrative Function field with the value that you selected for the Default Admin Function field on the UCAS Configuration page (if the Default Admin Function field is blank, then the system will enter ADMA in the Administrative Function field).
- Enters the variable data based on the application choice (that is, academic career, student career Nbr, application number, and application center).

Deleting Incorrect UCAS Applicant Records

Access the UCAS Wrong Applicants page (**Student Admissions > UCAS Processing > Remove Wrong Applicants > UCAS Wrong Applicants**).

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

UCAS Wrong Applicants

Name: Nicole Elisa **ID:** 2993 **Date of Birth:** 02/11/1983

Academic Institution: PSGBR PeopleSoft University UK

Personal ID: 0043278648 [Personal Information](#) [Applicant Summary](#)

Application Code: UC01 **Application Year:** 2012

Wrong Applicant Details

Status: Pending

☒ Cancelled **Cancelled Date:** 03/06/2012

☐ Miscoded **Timestamp:**

☐ Choice 1 Lost ☐ Joint Admission

☐ Choice 2 Lost

☐ Choice 3 Lost

☐ Choice 4 Lost

☐ Choice 5 Lost

☐ Choice 6 Lost

☐ Choice 7 Lost

Remark:

In certain circumstances, an incoming UCAS applicant record can be incorrectly matched to an existing person record during the import process or through the Transaction Data page. In such circumstances:

1. Use the UCAS Remove Wrong Applicants component to manually add the wrong applicant record.
2. Select the Cancelled check box. If needed, edit the Cancelled Date field. Optionally, enter a remark.
3. Save the record.
4. Click the Remove Applicant button to run the Remove Applicant process. This process removes the incorrectly matched applicant.

The Remove Applicant process does not alter the person-related records (for example, Disability, Ethnicity, Citizenship, National ID, External System ID and so on) that the Import Applicant Data process may have created for the incorrect ID. These records should be updated or removed using the relevant Campus Community pages. In particular, the UCAS Personal ID that the import process creates as an External System ID for the incorrect ID should be removed to prevent the record being incorrectly matched again during the re-import.

5. Run the Import Applicant Data process for the single applicant so that all the deleted applicant records can be re-imported and either matched to the correct person or a new person record created.

Field or Control	Description
Cancelled Date	This field is available for edit only when you are manually adding a record. After you save the manually added record, this field becomes unavailable.
Remark	This field is available for edit only when you are manually adding a record.
Remove Applicant	<p>Click to run the Remove Applicant process that will delete the IDs:</p> <ul style="list-style-type: none"> • UCAS applicant record. • UCAS application choice records. • Non-matriculated Campus Solutions application records. <p>The system enables this button if the status is <i>Pending</i>, <i>Partially Removed</i>, or <i>No Action</i>.. When you click the button, the status changes to <i>Removed</i>.</p> <p>When you click the button for a UCAS applicant for whom only specific choices are lost, the system removes the specific lost choices but retains the overall applicant record.</p> <p>For a manually added record, the system enables the button only when you save the record.</p>
No Action	<p>Click to change the record status from <i>Pending</i> to <i>No Action</i>. The <i>No Action</i> status indicates that the record need not be removed.</p> <p>For a manually added record, the system enables the button only when save the record.</p>

After clicking the **Remove Applicant** button, navigate to **Campus Community > Personal Information > ID Management > ID Delete** to remove the person record of the UCAS wrong applicant.

Entering an Initial Admission Decision for a UCAS Application Choice

Access the UCAS Initial Decision Entry page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Initial Decision Entry**).

This example illustrates the fields and controls on the UCAS Initial Decision Entry page. You can find definitions for the fields and controls later on this page.

UCAS Initial Decision Entry			
Name	Salvatore Cook	ID	0123
Academic Institution	PSGBR	PeopleSoft University UK	Date of Birth
UCAS Personal ID	1063278675	Personal Information	Applicant Summary
Application Code	UC01	Application Year	2016
Status	10		
Choice Details			
Choice Number	5	Application Number	00036101
UCAS Course	C100 Biology	UCAS Campus	*
Entry Year	2016	Entry Month	9
Entry Point	1		
UCAS Decision		Reply	
		Maintain Applications	
		Choice Details	
		Application Notes(0)	
		Comments(0)	
		CAS Details(1)	
Decision Details			
*Institution Decision	<input type="text"/>	Decision Date/Time	06/08/21 1:08:43AM
Decision Code	<input type="text"/>		
Decision Maker	<input type="text"/>	Comment	<input type="text"/>
Approval Status			
Notes			
*Effective Date	06/08/2021	*Effective Sequence	1
*Notes	<div></div>		
	2000 characters remaining		
Action Required	<input type="text"/>		
Outcome Code	<input type="text"/>		
User ID	PS	Locherty, Betty	Last Updated
			06/08/2021

If you didn't select the Interview Applicants option on the UCAS Initial Decision Entry search page, an application choice is included in the search results only if all the following conditions are satisfied:

- An institution decision does not exist.
- UCAS decision of the choice is blank.
- Choice isn't cancelled.
- Action isn't Declined by Default (*D*) or Rejected by Default (*R*).
- The whole application isn't withdrawn.

In such a case, the UCAS Initial Decision Entry page does not allow you to modify an institution decision. If you want to modify an institution decision, use the UCAS Decision Processing page.

If you select the Interview Applicants option on the UCAS Initial Decision Entry search page, an application choice is included in the search results only if all the following conditions are satisfied:

- An institution decision record exists with decision = *I* (interview) and decision is approved or does not require approval.

- UCAS decision value of the choice (imported from StarC/StarG) is not *W* (withdrawn) or *R* (rejected).
- Choice is not cancelled.
- Action isn't Declined by Default (*D*) or Rejected by Default (*R*).
- The whole application is not withdrawn.

In such a case, you can then use the UCAS Initial Decision Entry to modify the Interview decision to a post-interview decision (that is, Offer, Conditional offer, or Reject).

Decision Details

Field or Control	Description
Institution Decision	<p>Select an admission decision. After you enter a decision, run the Transaction Processing process to generate the transaction to send to UCAS.</p> <p>If the choice number is 9 (Clearing), the valid decisions are <i>A</i> (Accept) or <i>R</i> (Rejection). If the choice number is 6 (Adjustment), the valid decision is <i>U</i> (Unconditional Offer). If the choice number is not 9 or 6 (standard application), the valid decisions are <i>C</i> (Conditional Offer), <i>U</i> (Unconditional Offer), <i>R</i> (Rejection), <i>F</i> (Course Full), and <i>I</i> (Interview).</p> <p>The Interview Date and Interview Time fields appear only if you select the Interview decision.</p> <p>You cannot enter the Delayed Conditional decision code (D) in this page or the UTT Initial Decision Entry page. This decision can be entered only in the Decision Processing page.</p>
Decision Code	Optionally, add a standard offer to the decision.
Interview Date	Select the date on which the interview is to take place.
Interview Time	Enter the time the interview is scheduled to begin. The time format uses a 24-hour clock. Therefore, for example, if the interview time is 2:30 PM, enter <i>14:30</i> .
Comment	<p>For all decisions you can add a comment, unless a standard offer is entered.</p> <p>You can enter the reason for a Clearing Rejection in the Comment field. When you generate a RX transaction for the rejection, the system includes the comment text in the Free Format column of the RX transaction.</p>

Notes

This region is similar to the Apply Application and UCAS Confirmation Enquiries pages.

Related Links

[Reviewing Imported Apply Applications and Applicant Data](#)

Entering or Updating an Admission Decision for a UCAS Application Choice

Access the UCAS Decision Processing page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Decision Processing**).

This example illustrates the fields and controls on the UCAS Decision Processing page (1 of 3). You can find definitions for the fields and controls later on this page.

UCAS Decision Processing

Name Sally Hillier

ID 2459

Date of Birth 03/12/1987

Academic Institution PSGBR PeopleSoft University UK

UCAS Personal ID 1493381176

Personal Information

Applicant Summary

Application Code UC01

Application Year 2022

Status 10

Referred

Choice Details

Choice Number 1

UCAS Course C100 Biology-2019

Entry Year 2022

Entry Point 1

UCAS Decision

Application Number 00025212

UCAS Campus *

Entry Month 9

Reply

Maintain Applications

Choice Details

Application Notes(0)

Comments(0)

CAS Details(1)

Qualifications

Personalize | Find | 1-5 of 5 | Last

Year	Month	Award Body	Type	Subject	Result	Predicted Grade	Grade	Predicted Practical Grade	Practical Grade	Qualification ID	Timestamp	Further Information
2020	8	OCR	General Certificate of Secondary Education	English	B				Long practical grade	2000000005	02/16/2021 12:00:00AM	Further Information
2020	8	Edexcel	General Certificate of Secondary Education	Mathematics	A				B	2000000006	02/16/2021 12:00:00AM	Further Information
2022	8	AQA	GCE Advanced Level	English Language	Incomplete	B		Abcd		2000000007	02/16/2021 12:00:00AM	Further Information
2022	8	AQA	GCE Advanced Level	History	Incomplete	A*		Abcd		2000000008	02/16/2021 12:00:00AM	Further Information
2022	8	AQA	GCE Advanced Level	Geography	Incomplete	A		Abcd		2000000009	02/16/2021 12:00:00AM	Further Information

Exam Results

Personalize | Find | 1-3 of 3 | Last

Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results
2022	8	AQA	GCE A Level	English Language	A	48	Unit Results
2022	8	AQA	GCE A Level	History	B	40	Unit Results
2022	8	AQA	GCE A Level	Geography	A*	56	Unit Results

This example illustrates the fields and controls on the UCAS Decision Processing page (2 of 3). You can find definitions for the fields and controls later on this page.

Predicted Grades

Referee Name Mrs Fran Wetherby

Predicted Grades

English - Grade A, History - Grade B, Geography = Grade A/B

Predicted Practical Grades

AABB

Decision Details

Find | View All First 1 of 1 Last

*Institution Decision

Decision Date/Time 06/08/21 3:54:58AM

Approval Status

Course Change

Entry Year Change

Decision Code

Confirmation Decision

Decision Maker

Approver

Campus Change

Entry Month Change

Entry Point Change

Release to Clearing

Offer Details

Personalize | Find | First 1 of 1 Last

Order	Abbrev	Grade / Mark	@ or /	Subject	End /	Text
1						

Comment

Free Format

Transaction Code 592 characters remaining

Summary of Conditions

Manual Matching Required

Letter Text

This example illustrates the fields and controls on the UCAS Decision Processing page (3 of 3). You can find definitions for the fields and controls later on this page.

Notes

Find | View All First 1 of 1 Last

*Effective Date 06/08/2021

*Effective Sequence 1

*Notes

2000 characters remaining

Action Required

Outcome Code

User ID PS Locherty,Betty

Last Updated 06/08/2021

Field or Control	Description
Institution Decision	<p>Select an admission decision. After you enter or update a decision, if required, use the UCAS Decision Approval page to approve the decision. Then use the Transaction Processing process to generate the decision transaction to send to UCAS.</p> <p>The validations of this field are similar to that of the Institution Decision field on the UCAS Initial Decision Entry page. However, you can enter the Delayed Conditional (D) decision only from this page. Decision D is valid only for non-clearing CF application choices (CF means decision is <i>Conditional Offer</i> and reply is <i>Firm</i>).</p>
Confirmation Decision	The system automatically selects this check box when you enter a Confirmation decision in the UCAS Confirmation Entry page or the UCAS Quick Confirmation page.
Release to Clearing	The system automatically selects this check box when you enter a Release into Clearing decision in the UCAS Release to Clearing page.
Decision Code	Optionally, add a standard offer to the decision.
Comment	<p>The usage of this field is similar to that of the Comment field on the UCAS Initial Decision Entry page. The only difference is that on this page you can use this field for transaction code. For example, if Interview Date is <i>May 26, 2009</i> and Interview Time is <i>9:15</i> and Comment is <i>Bring your portfolio</i> and you click Letter Text, then the following transaction code appears 260509-0915,'Bring your portfolio'</p>

The offer details fields are similar to the fields on the Standard Offers page.

Notes

This region is similar to the Apply Application and UCAS Confirmation Enquiries pages.

Related Links

[Reviewing Imported Apply Applications and Applicant Data](#)

Entering a Decision for Multiple UCAS Application Choices

Access the UCAS Quick Decision Entry page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Quick Decision Entry**).

This example illustrates the fields and controls on the UCAS Quick Decision Entry page. You can find definitions for the fields and controls later on this page.

Quick Decision Entry

*Academic Institution: PeopleSoft University UK ☐ Interview Applicants

UCAS Course:

UCAS Campus:

UCAS Entry Year:

Application Center:

Created Date - From: Created Date - To:

Decision: Decision Date/Time: 10/06/12 11:03:35PM

Decision Code: Approval Status:

Decision Maker:

Comment:

Only the first 300 results can be displayed.

UCAS Personal ID	UCAS Application Code	Created Date	Choice Number	Last Name	First Name	UCAS Course Code	Campus	Entry Year	Entry Month	UCAS Entry Point	Decision	Approval Status	Apply	Decision Processing
1 0043278419	UC01	17/05/2012	9	Julie	Fallon	W300	*	2012	9	1			<input type="button" value="Apply"/>	Decision Processing
2 0043278428	UC01	17/05/2012	9	Fairy	Libbie	W300	*	2012	9	1			<input type="button" value="Apply"/>	Decision Processing
3 0043278437	UC01	17/05/2012	9	Kathi	Meg	W300	*	2012	9	1			<input type="button" value="Apply"/>	Decision Processing

If you do not select the Interview Applicants check box on the UCAS Quick Decision Entry page, a choice is included in the search results only if all the following conditions are satisfied:

- An institution decision does not exist.
- UCAS decision of the choice is blank.
- Choice is not cancelled.
- The whole application is not withdrawn.

In such a case, the page does not allow you to modify an admission decision. If you want to modify an admission decision, use the UCAS Decision Processing page.

If you select the Interview Applicants check box on this page, a choice is included in the search results only if all the following conditions are satisfied:

- An institution decision record exists with decision = *I* (interview) and decision is approved or does not require approval.
- UCAS decision value of the choice (imported from StarC/StarG) is not *W*.
- Choice is not cancelled.
- The whole application is not withdrawn.

In such a case, you can use this page to modify the Interview decision to a post-interview decision (that is, Offer, Conditional offer, or Reject).

The system enables the Interview Date - From and Interview Date - To search fields and displays the interview date column in the search results, if you select the Interview Applicants check box. And the

system enables the Created Date - From and Created Date - To search fields, if you deselect the Interview Applicants check box.

You can search for records of a particular institution, course, campus, entry year and application center or combination of those. The decision, decision code, decision maker and comment field values are used for all the records that have a decision applied and are saved.

You cannot enter the Delayed Conditional decision code (D) in this page or the UTT Quick Decision Entry page. This decision can be entered only in the Decision Processing page.

Entering or Updating a Decision for Apply Applications

Access the Apply Decisions page (**Student Admissions > UCAS Processing > Apply Decision Processing > Apply Decisions**).

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

The screenshot displays the 'Apply Decisions' page with the following sections and fields:

- Personal Information:**
 - ID: 3792
 - First Name: Synthia
 - Last Name: Schuppe
 - Academic Institution: PeopleSoft University UK
 - Candidate ID: C12217
 - Reference: PP2396
 - Application ID: 14605
 - Date of Birth: 10/20/1961
 - Cycle: 2021
 - Last Update: 04/20/2021 12:57:45AM
- Decision Section:**
 - *Effective Date: 04/22/2021
 - *Decision: Offer
 - Decision Maker: [Searchable Field]
 - Buttons: Expand All, Collapse All
 - Navigation: Find | View All | First | 1 of 1 | Last
- Course Change Section:**
 - Provider Code, Site Code, Course, Study Mode, Cycle
 - Buttons: Select Course, Clear Course
- Conditions Section:**
 - Details:**
 - Condition Text
 - 1 Disclosure and Barring Service (DBS) check
 - 2 Fitness to Teach check
 - Buttons: Select Offer, Select Condition
- Export Details Section:**
 - Export Status: Completed
 - Timestamp: 04/22/2021 3:11:04AM
 - Export Error Message: [Text Area]

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

The screenshot shows the 'Application' page with the following fields and controls:

- Effective Date:** 05/04/2021
- Provider:** WY6 West Kuhn Academy
- Course Code:** QRMI Biomedical Science
- Study Mode:** full_time
- Entry Year:** 2021
- Application Number:** 00048050 [Maintain Applications](#)
- Submitted:** 04/13/2021
- Last Update:** 04/22/2021 11:10:43AM
- Application Status:** Offer
- Site Code:** GZUBX
- Application Phase:** apply_1
- Entry Month:** 3
- CAS Details(0)**
- Reject by Default:** 05/09/2021
- Withdrawn Date:**
- Conditions:**
 - Disclosure and Barring Service (DBS) check
 - Fitness to Teach check
- Offer Date:** 04/22/2021
- Offer Declined Date:**
- Offer Accepted Date:**
- Recruited Date:**
- Rejection Date:**
- Notes:** (Expandable section)
- Contact:** (Expandable section)
- Candidate:** (Expandable section)
- Qualifications:** (Expandable section)
- Personal Statement:** (Expandable section)
- Work History:** (Expandable section)
- References:** (Expandable section)

The regions Application, Contact, Candidate, Qualifications, Personal Statement, Work History, and References are similar to the ones on the Apply Application page.

Note: You may see positive or negative service indicator icons on the page. If you select either icon, the Manage Service Indicators page appears.

Decision

In this region, you can view current and older effective-dated records as well as delete them.

Field or Control	Description
Effective Date	<p>This defaults to the current date when you add a new row.</p> <hr/> <p>Note: You can select a future effective date, but future records aren't included in the export process.</p> <hr/>
Decision	<p>Select your decision for this application.</p> <p>The values you can select are derived from the most recent effective-dated row on the Apply Application Status page. For information about the decisions and application status mapping, see Creating or Reviewing Application Statuses for Apply Applications.</p>

Field or Control	Description
Decision Maker	<p>When a decision has been made, this field is populated with a default value from any one of these:</p> <ul style="list-style-type: none"> • If the user has defined a Decision Maker on the UCAS, Apply Defaults page. • If the Default Decision Maker check box is selected on the UCAS Configuration page, and the user who makes the decision is associated with an EMPLID, then this value is the default. • Blank by default.
Rejection Reason	<p>This field appears only when your <code>Decision = Rejected</code>, and can be populated with predefined text that you select by clicking <i>Select Reason</i>.</p> <p>You can still edit the predefined text once this field is populated.</p>
Select Reason	Click to select pre-defined text for rejected applications. The text populates the Rejection Reason field.

Course Change

This region appears only when `Decision = Offer`.

Field or Control	Description
Select Course	<p>Click to select an Apply Course. When you select a course, the fields in this region are populated and the existing conditions in the Conditions region are removed.</p> <p>If there's a default offer on the Apply Course page for the new course, the Conditions grid is populated with the conditions defined for the most recent row of that offer.</p> <p>The list includes all Apply Course records for the cycle of the application for all provider codes.</p>
Clear Course	Select to clear all the fields in this region as well as any default conditions in the Conditions region for the change of course.

Conditions

This region appears only when `Decision = Offer`. You can do any one of these actions:

- Edit or delete the text even when the text is populated from an offer.
- Click + to add ad hoc conditions that are specific to an application.

The Conditions region is populated based on these scenarios:

- If there's a default offer on the Apply Course page for the existing course or cycle of the choice, then this region is populated with the conditions associated with the most recent effective row of the offer.
- If there isn't a default offer and an Apply Offer is set as the default in the most recent effective-dated row for the offer, then the conditions associated with the most recent effective-dated row for the offer populates this region.
- If a default offer isn't defined on the Apply Course page nor is there a default offer on the Apply Offers page, the Conditions region is blank.

Field or Control	Description
Select Offer	<p>Optional. Click to select an Apply Offer record. Only active offers are available to choose from. But the system may limit the choices to Available Offers that are defined on the Apply Course page.</p> <p>When you select an offer record, existing rows in this region are removed. The conditions from the most recent effective-dated row for the offer populate this region.</p>
Select Condition	<p>Optional. Click to select an Apply Condition record. Only active conditions are available to choose from. But the system may limit the choices to Available Conditions that are defined on the Apply Course page.</p> <p>When you select a condition record, a new row is added with the condition from the condition record you selected.</p>

Export Details

Field or Control	Description
Export Status	<p>For new records, this field defaults to <i>New</i>. The decision export process updates this value to either <i>Completed</i> or <i>Error</i>.</p> <p>You can manually set the status to <i>Resend</i> to re-export an existing decision record after you correct an error.</p>

3C/Attachments

This region has the same functionality as UTT Application Notes.

Approving or Rejecting a UCAS Decision

Access the UCAS Decision Approval page (**Student Admissions > UCAS Processing > UCAS Decision Approval > Decision Approval**).

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

UCAS Decision Approval			
Name:	Fallon Julie	ID:	0068
Date of Birth:	13/10/1989		
Academic Institution:	PSGBR PeopleSoft University UK		
UCAS Personal ID:	0043278419	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2012
Choice Details			
Choice Number:	2	Application Number:	00024903 Maintain Applications
UCAS Course:	V100 History	UCAS Campus:	* Choice Details
Entry Year:	2012	Entry Month:	9 Application Notes(0)
Entry Point:	1		Comments(0)
UCAS Decision:		Reply:	CAS Details(0)
Decision Details			
Institution Decision:	U Unconditional Offer	Decision Maker:	
Decision Date/Time:	26/06/13 12:32:50AM		
Approval Status:	P Awaiting Approval	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>
Approver:	<input type="text"/>		
Course Change:		Campus Change:	
Entry Year Change:		Entry Month Change:	Entry Point Change:
Decision Code:			
Offer Details			
Letter Text:			
Transaction Code:	<input type="text"/>		
Summary of Conditions:			

Click Approve or Deny button to indicate whether the admission decision entered in the UCAS Decision Processing or UCAS Initial Decision Entry page is approved or denied.

Approving or Rejecting Multiple UCAS Decisions

Access the UCAS Quick Decision Approval page (**Student Admissions > UCAS Processing > UCAS Decision Approval > Quick Decision Approval**).

This example illustrates the fields and controls on the UCAS Quick Decision Approval page. You can find definitions for the fields and controls later on this page.

Quick Decision Approval

'Academic Institution: PeopleSoft University

UCAS Course:

UCAS Campus:

UCAS Entry Year:

Application Center:

Approver:

UCAS Personal ID	UCAS Application Code	Choice Number	Last Name	First Name	UCAS Course Code	UCAS Campus	Entry Year	Entry Month	UCAS Entry Point	Decision	Approval Status	Approve	Deny	Decision Processing
16 1097001814	UC01	1	Collins	Nicholas	G522	*	2009	9	1	C	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing
17 1097001822	UC01	3	Brown	Tyler	G522	*	2009	9	1	C	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing
18 1097001877	UC01	3	Jefferys	William	G522	*	2009	9	1	F	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing
19 1097001899	UC01	3	Murphy	Ryan	G522	*	2009	9	1	I	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing

You can search for records of a particular institution, course, campus, entry year and application center or combination of those. The Approver value is used for all the records that are approved and saved.

Determining Whether Applicants Satisfy the Offer Conditions

Access the Result/Offer Matching Process page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Result/Offer Matching Process**).

This example illustrates the fields and controls on the Result/Offer Matching Process page. You can find definitions for the fields and controls later on this page.

Result/Offer Matching Process

Run Control ID: NG01 [Report Manager](#) [Process Monitor](#)

*Academic Institution: PeopleSoft University

UCAS Course Code:

Student Override

☒ Student Override

EmpID	Name
1 6108	Black, Nicholas

Field or Control	Description
Student Override	<p>Select if you want to run the process for one or more IDs selected in the EmplID field.</p> <p>If you select the Student Override check box, the process ignores any values entered in the UCAS Course Code field.</p>

For a student, the process can compare the conditions you generated (Transaction Code) on the UCAS Decision Processing page with the exam results, and determine whether the student has satisfied the conditions. The process considers the following abbreviations when comparing conditional offer details with exam results:

- TO - Tariff offers
- GC - GCE A Level
- AS - GCE AS Level
- IH - Irish Leaving Certificate (Higher Level)
- SH - SQA Highers
- AH - SQA Advanced Highers
- EG - Excluding General Studies
- AC - Alternate conditions

Any other abbreviations need to be manually reviewed before the offer is confirmed.

After running this process, navigate to the UCAS Confirmation Entry page to check whether the applicant has satisfied the conditions. If the process determines that the applicant has satisfied all the conditions, the **Results Matching** field displays *Satisfied* on the UCAS Confirmation Entry page. If the process determines that at least one condition has not been met, the Results Matching field displays *Not Satisfied*. If the process determines that at least one condition has not been evaluated, the Results Matching field displays *Partially Evaluated*. If the process determines that none of the conditions have been evaluated, the Results Matching field displays *Not Evaluated*.

The following example shows how the Result/Offer Matching process works for a tariff offer:

1. Use the UCAS Decision Processing page to enter a conditional offer for a student.

Enter abbreviation = TO (Tariff Score) and Grade Mark = 200. This condition is generated: *The student must obtain a minimum of 200 UCAS tariff points.*

2. Import the exam results from ivStarPQR.

The student has grade C for GCE A Levels in Maths, General Studies, and English.

3. Run the Results/Offer Matching process for the student.

The system uses the imported cvRefTariff data to translate the total tariff score to 240 (grade C is equivalent to 80 tariff points).

4. The UCAS Confirmation Entry page for the student shows that the condition is satisfied.

Note: The Result/Offer Matching process considers only records that have a current decision of *C* or *D*, for which the Manual Matching Required check box is cleared on the UCAS Decision Processing page.

Entering or Updating a UCAS Confirmation Decision

Access the UCAS Confirmation Entry page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Confirmation Entry**).

This example illustrates the fields and controls on the UCAS Confirmation Entry page (1 of 3). You can find definitions for the fields and controls later on this page.

UCAS Confirmation Entry			
Name:	Diana Harper	ID:	0527
Date of Birth:	18/08/1989		
Academic Institution:	PSGBR PeopleSoft University UK		
UCAS Personal ID:	0053381387	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2013
Choice Details			
Choice Number:	1	Application Number:	00025815 Maintain Applications
UCAS Course:	F100 Chemistry	UCAS Campus:	* Choice Details
Entry Year:	2013	Entry Month:	9 Application Notes(0)
Entry Point:	1		Comments(0)
UCAS Decision:	Conditional Offer	Reply:	Firm CAS Details(1)
Decision Confirmation			
Institution Decision:	C Conditional Offer	<input type="button" value="Accept"/>	<input type="button" value="Reject"/>
Decision Date/Time:	19/06/2013 5:57:23AM	Decision Maker:	<input type="text"/>
Approval Status:	N Not Required	Approver:	<input type="text"/>
Course Change:	<input type="text"/>	Campus Change:	<input type="text"/>
Entry Year Change:	<input type="text"/>	Entry Month Change:	<input type="text"/>
		Entry Point Change:	<input type="text"/>
Results Matching:	Not Satisfied		

This example illustrates the fields and controls on the UCAS Confirmation Entry page (2 of 3). You can find definitions for the fields and controls later on this page.

Qualifications						
Personalize Find First 1-11 of 11 Last						
Qualification Details Subject Details						
Year	Month	Award Body	Type	Subject	Result	Predicted Grade
2011	8	CAM	GCE A Level	Chemistry	Incomplete	B
2011	8	CAM	GCE A Level	Physics	Incomplete	A
2011	8	CAM	GCE A Level	Mathematics	Incomplete	A*
2011	8	CAM	GCSE	Art	A	
2011	8	OCR	GCSE	French	B	
2011	8	CAM	GCSE	Geography	B	
2011	8	OCR	GCSE	History	C	
2011	8	CAM	GCSE	Chemistry	A	
2011	8	OCR	GCSE	Physics	B	
2011	8	CAM	GCSE	Mathematics	A	
2011	8	OCR	GCSE	English	A	
Exam Results						
Personalize Find View All First 1-3 of 3 Last						
Result Details Subject Details						
Year	Month	Award Body	Type	Subject	Result	Tariff Score
2013	8	AQA	A LEVEL	PHYSICS	B	100
2013	8	AQA	A LEVEL	CHEMISTRY	C	80
2013	8	AQA	A LEVEL	MATHEMATICS	A	

This example illustrates the fields and controls on the UCAS Confirmation Entry page (3 of 3). You can find definitions for the fields and controls later on this page.

▼ Letter Text

Transaction Code: .GC,ABB,.GC,BC/MATHS,CHEM/,.AC,.GC,BBC,.GC,B/MATHS,CHEM/,.GC,B@PHYS

Summary of Conditions:

Letter Text:

GCE A level
Grades ABB
GCE A level
Grades BC in any order in
Mathematics
Chemistry
Alternative conditions

GCE A level
Grades BBC
GCE A level
Grade B in any 1 of
Mathematics
Chemistry
GCE A level
Grade B in Physics

▼ Results Matching

☐ Manual Matching Required

Line Number	Transaction Code	Result Matching Text
1	.GC,ABB	NOT SATISFIED
2	.GC,BC/MATHS,CHEM/	SATISFIED
3	.AC,	Alternative Condition
4	.GC,BBC	SATISFIED
5	.GC,B/MATHS,CHEM/	NOT SATISFIED
6	.GC,B@PHYS	SATISFIED

Click the **Accept** or **Reject** button to indicate the Confirmation decision.

To add any changes to the course details, first enter the changes, then click the Accept button, and finally save the record. For example, enter a Campus Change value, click the Accept button, and then save the record.

Note that if you decide to save the record without clicking either the Accept button or Reject button, then the system removes any course change details in the existing non-confirmation decision record.

All application records that are CF or CI (decision is conditional offer, and reply is firm or insurance) appear on the UCAS Confirmation Entry page regardless of whether a confirmation decision is pending or has been entered. Additionally, any application records that are DF (decision is delayed conditional and reply is firm) appear on the UCAS Confirmation Entry page regardless of whether a confirmation decision is pending or has been entered. You can enter or amend a confirmation decision using this page.

The system automatically selects the **Confirmation Decision** check box on the UCAS Decision Processing page when you click **Accept** or **Reject**.

After you enter a Confirmation decision, if required, use the Confirmation Approval page to approve the decision. Then run the Transaction Processing process to generate the RD transaction to send to UCAS.

If you amend an existing confirmation decision using this page, in most cases, the Transaction Processing process generates another RD transaction with the new Accept or Reject decision. However, in cases where you have already sent an accept decision and a course change is being made, then the process generates a RA transaction.

If the Entry Point is being changed to a foundation year with Entry Point of zero, you must enter 9 in the Entry Point Change field of this page. The system will send this value to UCAS in the confirmation transaction as zero when you run the Transaction Processing process.

Entering Multiple UCAS Confirmation Decisions

Access the UCAS Quick Confirmation page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Quick Confirmation**).

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

UCAS Quick Confirmation

*Academic Institution PeopleSoft University UK

UCAS Course

UCAS Campus

UCAS Entry Year Reply

Application Center [Search Decisions](#)

Decision Maker Decision Date/Time 11/06/12 3:25:52AM

Only the first 300 results can be displayed.

UCAS Personal ID	UCAS Application Code	Choice Number	Last Name	First Name	UCAS Course	UCAS Campus	Entry Year	Entry Point	Results Matching	Accept	Reject	Decision	Reply	Confirmation Details
1 0053279137	UC01	1	Debbi	Denita	L300	*	2012	1		Accept	Reject	C	I	Confirmation Details
2 0053279155	UC01	1	Malia	Mitchell	C100	*	2012	1		Accept	Reject	C	I	Confirmation Details

The same rules discussed in the “Entering a Confirmation Decision” topic apply to the UCAS Quick Confirmation page. However, there are two exceptions:

- The Quick Confirmation page does not display a DF application choice.
- The Quick Confirmation page does not display an application choice for which you already have entered a confirmation decision.

You can search for records of a particular course. Also, you can use the same Decision Maker value for all the records that appear in the search results.

A choice is included in the search results of this page only if all the following conditions are satisfied:

- Institution decision is C (conditional offer)
- Reply of the choice (from ivStarC) is F or I.
- Choice is not cancelled.

- The whole application is not withdrawn.

When you click Accept or Reject, the system automatically updates the **Decision** value to *A* or *R*, respectively.

Approving or Rejecting a UCAS Confirmation Decision

Access the UCAS Confirmation Approval page (**Student Admissions > UCAS Processing > UCAS Decision Approval > Confirmation Approval**).

This example illustrates the fields and controls on the UCAS Confirmation Approval page (1 of 2).

UCAS Confirmation Approval			
Name:	Nicole Gallup	ID:	0534
Date of Birth:	03/12/1983		
Academic Institution:	PSGBR PeopleSoft University UK		
UCAS Personal ID:	0063278648	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2014
Choice Details			
Choice Number:	1	Application Number:	00025827 Maintain Applications
UCAS Course:	C100 Biology	UCAS Campus:	* Choice Details
Entry Year:	2014	Entry Month:	9 Application Notes(0)
Entry Point:	1		Comments(0)
UCAS Decision:	Conditional Offer	Reply:	Firm CAS Details(1)
Decision Confirmation			
Institution Decision:	A Accept	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>
Decision Date/Time:	26/06/13 12:35:46AM	Decision Maker:	
Approval Status:	P Awaiting Approval	Approver:	<input type="text"/>
Course Change:		Campus Change:	
Entry Year Change:		Entry Month Change:	Entry Point Change:
Results Matching:			
▶ Exam Results			

This example illustrates the fields and controls on the UCAS Confirmation Approval page (2 of 2).

Letter Text

Transaction Code: .GC,AAA

Summary of Conditions:
Letter Text: This offer is subject to your obtaining
GCE A level
Grades AAA

Results Matching

☐ Manual Matching Required

Line Number	Transaction Code	Result Matching Text
1		

Approving or Rejecting Multiple UCAS Confirmation Decisions

Access the UCAS Quick Confirmation Approval page (**Student Admissions > UCAS Processing > UCAS Decision Approval > Quick Confirmation Approval**).

This example illustrates the fields and controls on the UCAS Quick Confirmation Approval page. You can find definitions for the fields and controls later on this page.

Quick Confirmation Approval

*Academic Institution PSGBR PeopleSoft University UK

UCAS Course

UCAS Campus

UCAS Entry Year

Application Center

Search Decisions

Approver 0002 Susan Jones

Only the first 300 results can be displayed.

UCAS Personal ID	UCAS Application Code	Choice Number	Last Name	First Name	UCAS Course	UCAS Campus	Entry Year	Results Matching	Decision	Approve	Deny	Approval Status	Description	Confirmation Details
1 0035697369	UC01	1	Cicely	Nam	L300	*	2011		A	Approve	Deny	P	Awaiting Approval	Confirmation Details
2 0053279155	UC01	1	Malia	Mitchell	C100	*	2012		A	Approve	Deny	P	Awaiting Approval	Confirmation Details

You can search for records of a particular institution, course, campus, entry year and application center or combination of those. The Approver value is used for all the records that are approved and saved.

Entering a Decision to Release an Applicant into Clearing

Access the UCAS Release to Clearing page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Release to Clearing**).

This example illustrates the fields and controls on the UCAS Release to Clearing page. You can find definitions for the fields and controls later on this page.

UCAS Release to Clearing			
Name:	Joyce Rowling	ID:	0441
Date of Birth:	24/10/1980		
Academic Institution:	PSGBR PeopleSoft University UK		
UCAS Personal ID:	0053379852	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2013
Choice Details			
Choice Number:	6	Application Number:	00026728 Maintain Applications
UCAS Course:	F100 Chemistry	UCAS Campus:	* Choice Details
Entry Year:	2013	Entry Month:	9 Application Notes(0)
Entry Point:	1		Comments(0)
UCAS Decision:	Unconditional Offer	Reply:	Firm CAS Details(1)
Release to Clearing			
Institution Decision:	U Unconditional Offer	<input checked="" type="checkbox"/> Release to Clearing	
Decision Date/Time:	13/05/13 8:43:46AM	Decision Maker:	<input type="text"/>
Approval Status:	N Not Required	Approver:	
Release Reason:	<input type="text"/>		

The page displays:

- Application choices that have a Institution Decision of *U* (Unconditional), Reply of *F* (Firm), and the **Release to Clearing** check box cleared on the Decision Processing page.
- All accepted Clearing and Adjustment application choices (that is, application choice number is 6 or 9, decision is *A* or *U*, and Reply is not equal to *D* (declined)).

The system automatically selects the **Released to Clearing** check box on the UCAS Decision Processing page when you click **Release to Clearing**.

After you enter a decision to release an applicant into Clearing, if required, use the Release to Clearing Approval page to approve the decision. Then run the Transaction Processing process to generate the RR transaction to send to UCAS.

Note: The system displays a warning message if the applicant is not eligible for release to Clearing. That is, when you click the Release to Clearing button, a warning message appears if the application is for deferred entry, if the application is for a future or previous cycle, if the application is RPA (Record of Prior Acceptance), or if the application Fee Level is single fee.

Approving or Rejecting the Release into Clearing Decision

Access the UCAS Release Approval page (**Student Admissions > UCAS Processing > UCAS Decision Approval > Release to Clearing Approval**).

This example illustrates the fields and controls on the UCAS Release Approval page.

UCAS Release Approval			
Name:	Joyce Rowling	ID:	0441
Date of Birth:	24/10/1980		
Academic Institution:	PSGBR PeopleSoft University UK		
UCAS Personal ID:	0053379852	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2013
Choice Details			
Choice Number:	6	Application Number:	00026728 Maintain Applications
UCAS Course:	F100 Chemistry	UCAS Campus:	* Choice Details
Entry Year:	2013	Entry Month:	9 Application Notes(0)
Entry Point:	1		Comments(0)
UCAS Decision:	Unconditional Offer	Reply:	Firm CAS Details(1)
Release to Clearing			
Institution Decision:	W Withdrawal	<input type="button" value="Approve"/> <input type="button" value="Deny"/>	
Decision Date/Time:	26/06/13 12:38:08AM	Decision Maker:	
Approval Status:	P Awaiting Approval	Approver:	<input type="text"/>
Release Reason:	R1 Financial hardship		

Entering UCAS Clearing or Adjustment Details

To search for only adjustment records, select the Adjustment check box on the search page. To search for only Clearing records, clear the Adjustment check box on the search page.

Access the UCAS Enquiry Entry page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Enquiry Entry**).

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

UCAS Enquiry Entry

Academic Institution: PSUNV PeopleSoft University

Enquiry ID: 5 ☐ Adjustment

Personal ID: 1080000213
Application Code: UC01

*Application Year: 2010

*Surname: Miller
Title: Ms

*Forenames: Elaine

Date of Birth: 01/01/1986
Gender: Female

UCAS Course Code: C500 Microbiology
UCAS Campus: *

UCAS Entry Year: 2010
UCAS Entry Month: 9

UCAS Entry Point: 1
CEF Number:

Transaction Type: RX Clearing Decision
[UCAS Application Summary](#)

Decision: R Rejection

Decision Maker:
Decision Date/Time:

This example illustrates the fields and controls on the UCAS Enquiry Entry page (2 of 2). You can find definitions for the fields and controls later on this page.

Exam Results
Customize | Find | View All | First 1-2 of 2 Last

	Qualification Year	Qualification Month	Qualification Type	Award Body	Subject Code	*Subject Title	*Result		
1	2010	7	A	C	ART	Art	D	+	-
2	2010	7	A	C	BIOL	Biology	B	+	-

Notes
Notes:

Use the **Transaction Type** field to record an RQ, PE, or RX transaction for a Clearing enquiry or the RQ, PE, or AD transaction for an Adjustment enquiry. Use the Decision field to enter A (Accept) or R (Reject). After you record the Clearing or Adjustment details, run the Transaction Processing process to generate the Adjustment or Clearing transactions to send to UCAS.

If you want to record a PE transaction, the UCAS Personal ID and UCAS Application Code fields are required (UCAS Course Code is optional).

If you want to record a AD transaction, the UCAS Personal ID, UCAS Application Code, UCAS Course Code, Entry Year, and Entry Month fields are required.

The UCAS Course Code field is required for RQ and RX transactions. Also, the Decision field is required for RX transaction.

Reviewing and Updating UCAS Qualifications

Access the UCAS Qualifications page (**Student Admissions > UCAS Processing > UCAS Decision Processing > Qualifications**)

This example illustrates the fields and controls on the UCAS Qualifications page.

UCAS Qualifications

Name: Denise Brownlee **ID:** 0258 **Date of Birth:** 06/09/1992
Academic Institution: PSGBR PeopleSoft University UK
Personal ID: 0053279430 [Personal Information](#) [Applicant Summary](#)
Application Code: UC01 **Application Year:** 2013

Qualifications

Personalize | Find | | First 1-11 of 11 Last

Qualification Details | Subject Details |

Year	Month	Award Body	Type	Subject	Result	Predicted Grade		
2011	8	CAM	GCE A Level	Chemistry	Incomplete	B		
2011	8	CAM	GCE A Level	Physics	Incomplete	A		
2011	8	CAM	GCE A Level	Mathematics	Incomplete	A*		
2011	8	CAM	GCSE	Art	A			
2011	8	OCR	GCSE	French	B			
2011	8	CAM	GCSE	Geography	B			
2011	8	OCR	GCSE	History	C			
2011	8	CAM	GCSE	Chemistry	A			
2011	8	OCR	GCSE	Physics	B			
2011	8	CAM	GCSE	Mathematics	A			
2011	8	OCR	GCSE	English	A			

Exam Results

Personalize | Find | | First 1-3 of 3 Last

Result Details | Subject Details |

Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results
2013	8	AQA	A LEVEL	PHYSICS	B	100	Unit Results
2013	8	AQA	A LEVEL	CHEMISTRY	C	80	Unit Results
2013	8	AQA	A LEVEL	MATHEMATICS	A		Unit Results

Generating, Exporting, and Updating UCAS and UTT Transactions

Access the Transaction Processing page (**Student Admissions > UCAS Processing > Transaction Processing > Transaction Processing**).

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

Transaction Processing

Run Control ID: UC01 [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PSGBR PeopleSoft University UK

UCAS

- ☒ Generate Transactions
- ☐ Export Transactions to UCAS
- ☐ Update Transactions from UCAS

UTT

- ☒ Generate Transactions
- ☐ Export Transactions to UTT
- ☐ Update Transactions from UTT

Use the check boxes in the **UCAS** and **UTT** regions to generate, export, and update UCAS and UTT transactions.

<i>Field or Control</i>	<i>Description</i>
Generate Transactions	Select to generate transactions and update the corresponding Campus Solutions application choice records.
Export Transactions to UCAS	Select to write the transactions to the TRANIN table at UCAS.
Update Transactions from UCAS	Select to enable the Campus Solutions system to read back error codes from TRANIN at UCAS.

The system disables the UTT check boxes on the Transaction Processing page if you clear the UTT check box on the UCAS Configuration page.

Posting Decisions for Apply Applications

Access the Decision Export page (**Student Admissions > UCAS Processing > Apply Decision Processing > Apply Decisions Export**).

Use this page to run the process that posts your decisions using the Apply API. Once successfully posted, the error codes and updated applications are imported back into Campus Solutions to update the local

record. This confirms that your decision was exported. If there are any errors, they're stored in the local record, which allows you to correct the record and resend your decision.

When you initiate this process, it first checks that the Import Applicant Data process isn't running to prevent locking issues with the choice and staging records. If the import process is running, the export process stops and the system logs a message.

If the process continues, it then checks the configuration record for your institution to ensure that you have defined all the required values. For each decision record, if the most recent effective-dated row's Export Status is Either *New* or *Resend and*:

- Decision = *Offer*, the record is posted with this information:
 - The conditions are populated from the decision condition records.
 - Course object elements are included only if Course Change is selected, and each value is populated from the decision record.
- Decision = *Rejected*, the record is posted with this information:
 - The Rejection Reason is populated from the decision record.
 - The rejection date is populated with the effective date and time of the decision record.
- Decision = *Recruited*, the record is posted.
- Decision = *Conditions not met*, the record is posted.
- Decision = any other value, the decision is not exported and the record is updated with Export Status = *Error* and an error message.

When the record successfully posts, Export Status is set to *Complete* and the time stamp is included in the POST request. Otherwise, Export Status is set to *Error* and a message is logged.

For successful posts, the updated application choice and any conditions are imported, and the local choice record as well as the corresponding CS application (if required) are updated. This processing is the same as the processing performed for choice updates as part of the Import Applicant Data process.

Reviewing UCAS Transactions

Access the UCAS Transactions page (**Student Admissions > UCAS Processing > Transaction Processing > UCAS Transactions**).

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

UCAS Transactions			
Name:	Joyce Rowling	ID:	0441
Date of Birth:	24/10/1980		
Academic Institution:	PSGBR PeopleSoft University UK		
UCAS Personal ID:	0053379852	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2013
Choice Details			
Choice Number:	6	Application Number:	00026728 Maintain Applications
UCAS Course:	F100 Chemistry	UCAS Campus:	* Choice Details
Entry Year:	2013	Entry Month:	9 Application Notes(0)
Entry Point:	1		Comments(0)
UCAS Decision:	Unconditional Offer	Reply:	Firm CAS Details(1)
Decision Details			
Institution Decision:	W Withdrawal	Decision Maker:	
Decision Date/Time:	26/06/13 12:38:08AM	Approver:	
Approval Status:	P Awaiting Approval	Campus Change:	
Course Change:		Entry Year Change:	
		Entry Month Change:	
		Entry Point Change:	
Decision Code:			
Transaction Details			
Transaction Type:	RA UF Amendment	Transaction ID:	413
Error Code:	0	Error Position:	
Decision:		Created Date:	04/06/13 7:50:04AM
Course:	C100 Biology	Campus:	*
Entry Year:	2013	Entry Month:	9
		Entry Point:	1
Transaction Code:			<input checked="" type="checkbox"/> Auto <input checked="" type="checkbox"/> Sent <input type="checkbox"/> Hold <input type="checkbox"/> Obsolete
Summary of Conditions:			

You cannot update transactions that the system has already sent to UCAS. The transaction appears in read-only mode if the system has already sent the transaction to UCAS. If the system has not sent the transaction, you can use this page to update, delete, or hold the transaction.

Field or Control	Description
Error Code	<p>Displays the status of a transaction that UCAS sends back to the institution. You import the error codes, descriptions, and error positions from cvRefError view when you import the reference data.</p> <p>An error code of:</p> <ul style="list-style-type: none"> • <i>-1</i> indicates that UCAS has not yet processed the transaction. • <i>0</i> indicates that UCAS has successfully processed the transaction.
Error Position	Indicates where the error appears in the transaction code.
Decision	Select a decision for the transaction of an application choice.
Transaction Code	Enter the transaction code that you want to send to UCAS.
Auto	Indicates that the system has automatically generated the transaction.
Sent	Indicates that the system has sent the transaction to UCAS.
Hold	Select to indicate that you do not want the system to export the transaction to UCAS.
Obsolete	<p>Select if you do not want the transaction to appear in the search results when you search for error, hold, or unsent transactions. Note that you can select the Transactions in Error check box, Transaction on Hold check box, or Unsent Transaction check box on the UCAS Transactions search page to search for error, hold, or unsent transactions.</p> <p>Also, if you select the Obsolete check box, the system does not export the transaction to UCAS. Hold or obsolete transactions cannot be sent to UCAS.</p>

The following table lists the field values that are mandatory when you create a transaction manually. If you create a transaction manually, you will need to manually update the related Campus Solutions application record.

Transaction Type	Mandatory Field Value
LD (decision)	Decision
LA (amended decision)	
RD (confirmation decision)	

<i>Transaction Type</i>	<i>Mandatory Field Value</i>
LC (course correction)	At least one of the following values must be provided: <ul style="list-style-type: none"> • Course • Campus • Entry Year • Entry Month • Entry Point
RR (release into clearing)	Transaction Code must contain a value ranging from .R1 to .R8.
PE, RA, or RW	None
RA, RR, and RW	Application must be UF. That is, Decision must be <i>U</i> (Unconditional Offer) and Reply must be <i>F</i> (Firm).

Use the UCAS Enquiry Transactions page to manually create an RX or RQ transaction.

Reviewing UCAS Clearing and Adjustment Transactions

To search for only adjustment transactions, select the Adjustment check box on the search page. To search for only Clearing transactions, clear the Adjustment check box on the search page.

Access the UCAS Enquiry Transactions page (**Student Admissions > UCAS Processing > Transaction Processing > UCAS Enquiry Transactions**).

This example illustrates the fields and controls on the UCAS Enquiry Transactions page.

The screenshot displays the 'UCAS Enquiry Transactions' page. At the top right, there are links for 'New window' and 'Customize'. The page is divided into several sections:

- Personal Details:** Name: Andrew-60010002, West6, Date of Birth: 23/12/1969. There are icons for a red circle with a slash, a star, a person, and a calendar.
- Academic Institution:** PSUNV, PeopleSoft University, Enquiry ID: 2.
- Personal ID:** 0035836353, **Application Code:** UC01.
- UCAS Course Code:** (empty), **UCAS Campus:** Clearing Entry, ☐ Adjustment.
- UCAS Entry Year:** 2012, **UCAS Entry Month:** (empty), **UCAS Entry Point:** (empty).

Below these fields is a 'Transaction Details' section with a header bar containing 'Find | View All' and pagination 'First 1 of 1 Last'. The details are organized into two columns:

- Left Column:**
 - *Transaction Type: (input field with search icon)
 - Error Code: -1
 - Decision: (input field with search icon)
 - Course: (input field with search icon)
 - Entry Year: (input field)
- Right Column:**
 - Transaction ID: (input field with + and - buttons)
 - Error Position: (input field)
 - Created Date: 06/06/11 4:57:01PM
 - Campus: (input field with search icon)
 - Entry Month: (input field)
 - Entry Point: (input field)
 - Checkboxes: ☐ Auto, ☐ Sent, ☒ Hold, ☐ Obsolete.

Most of the fields on the UCAS Enquiry Transactions page are similar to those on the UCAS Transactions page.

Handling UCAS Applicant Enquiries

Access the UCAS Confirmation Enquiries page (**Student Admissions > UCAS Processing > UCAS Confirmation Enquiries**).

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

UCAS Confirmation Enquiries			
Name:	Juliann Jenna		ID: 3001
Academic Institution:	PSGBR PeopleSoft University UK		
Personal ID:	0043281406	Personal Information	
Application Code:	UC01	Application Year:	2012
Choice Details			
Choice Number:	1	Effective Date:	28/05/2012 Applicant Summary
UCAS Course:	F100 Chemistry	UCAS Campus:	* Faculty: 5
Entry Year:	2012	Entry Month:	9 Entry Point: 1
Previous Course:		Previous Campus:	
Adjustment Status:		Residency:	HOME Home/United Kingdom
Decision:		Decision Date/Time:	
Reply:		Summary Condition:	
Application Number:	00028050		
Program Action:	APPL Application	Action Reason:	UCAS UCAS Application
Description:	<input type="text"/>		
Script Text:	<input type="text"/>		
Application Center:	UCAS UCAS		
Telephone Contact 1:	Telephone Contact 2:		

This example illustrates the fields and controls on the UCAS Confirmation Enquiries page (2 of 2). You can find definitions for the fields and controls later on this page.

Notes		Find View All	First	1 of 1	Last
*Effective Date:	08/06/2012	*Effective Sequence:	1		
*Notes:	<input type="text"/>				
Action Required:	<input type="text"/>	Outcome Code:	<input type="text"/>		
User ID:	SATRN11				
▶ Other Choices					
▶ Qualifications					
▶ Exam Results					

The page displays all UCAS application choices (similar to the UCAS Applications component). There is no restriction to just Confirmation and Clearing application choices. You can add multiple notes records for an effective date.

<i>Field or Control</i>	<i>Description</i>
Notes	Enter the details of the interaction with the applicant.
Action Required	Select a value to filter the codes available on the Outcome Code field.
Outcome Code	Select a code to categorize the interaction with the applicant.

Note: If you have configured Automatic Save, the system automatically saves a new record when you enter the mandatory values. The Notes field is always mandatory. The Action Required and Outcome Code fields become mandatory, if Outcome Required is configured as mandatory. You configure Automatic Save and Outcome Required on the UCAS Configuration page.

Reviewing Key UTT Application Information

Access the UTT Application Notes page (**Student Admissions > UCAS Processing > UTT Application Notes**).

This example illustrates the fields and controls on the UTT Application Notes page (1 of 3).

UTT Application Notes

3C/Attachments

Name: Asha Shirley

ID: 0816

Date of Birth: 29/01/1962

Academic Institution: PSGBR

PeopleSoft University UK

UTT Personal ID: 1008696863

[Personal Information](#)

[Applicant Summary](#)

Application Code: GT01

Application Year: 2013

Choice Details

Round / Choice: 10

Application Number: 00026774

[Maintain Applications](#)

UTT Course: F1X1 Chemistry

Campus: *

[Choice Details](#)

Entry Year: 2013

Entry Month: 8

[Decision Entry](#)

UTT Decision:

Reply:

Modular:

Part Time:

[CAS Details\(0\)](#)

Application Details

Find | View All First 1 of 1 Last

Application Date: 15/05/2012

Status 10 Referred

Disability: A No disability

Nationality: 000 UK national

Country of Birth: 000 United Kingdom

UK Entry Date:

Residential Category: 1 UK Citizen or EU National

☐ Student Visa Required

Criminal Conviction:

☒ Criminal Records Declared

Unavailable: -

Qualifications

Personalize | Find | 1-13 of 13 First Last

Qualification Details

Subject Details

EEB

Year	Month	Award Body	Type	Subject	Result
1978	1	AQA	General Certificate of Secondary Education	English	C
1978	1	AQA	General Certificate of Secondary Education	Maths	G
1978	1	AQA	General Certificate of Secondary Education	Science	C
1978			General Certificate of Secondary Education	Business Studies B (ICAA)	U
1978			General Certificate of Secondary Education	Physical Education	B
1978			General Certificate of Secondary Education	Classical Civilisation	F
1978			General Certificate of Secondary Education	Spanish B (Modular)	A*

This example illustrates the fields and controls on the UTT Application Notes page (2 of 3).

1978		General Certificate of Secondary Education	Portuguese	G
1980		GCE Advanced Level	Mechanics	N
1980		GCE Advanced Level	Fashion + Textiles	A*
1980		GCE Advanced Level	Chemistry	E
1980		GCE Advanced Level	Chemistry A	B
1980		GCE Advanced Level	Theology	D

▼ Degree Details
Find | View All
First 1 of 1 Last

Degree Institution: London Metropolitan University
Highest Expected Qualification:
Degree Title: BSC
Degree Status: H Has obtained a Degree **Degree Result:** 1
Completion Year: 1984 **Completion Month:** 1
Degree Subject: Biology (Human)

Subject Detail
Personalize | Find |
First 1-12 of 12 Last

Qualification Detail ID	Subject Name	Duration	Main Subject	Timestamp
1102664	Art, Design + Media	10	Major Subj	13/05/14 12:50:51PM
1102665	Applied French	10	Major Subj	13/05/14 12:50:51PM
1102666	Art + Crafts	10	Major Subj	13/05/14 12:50:51PM
1102667	E-Flat Horn	10	Major Subj	13/05/14 12:50:51PM
1102668	Telecommunications	10	Major Subj	13/05/14 12:50:51PM
1102669	Italian Ab	10	Minor Subj	13/05/14 12:50:51PM
1102670	Acting and Theatre P	10	Minor Subj	13/05/14 12:50:51PM
1102671	erformance	-	Minor Subj	13/05/14 12:50:51PM
1102672	Biology 0300	10	Minor Subj	13/05/14 12:50:51PM
1102673	Welsh (Second Langua	10	Minor Subj	13/05/14 12:50:51PM
1102674	ge)	-	Minor Subj	13/05/14 12:50:51PM
1102675	Khmer A1	10	Minor Subj	13/05/14 12:50:51PM

This example illustrates the fields and controls on the UTT Application Notes page (3 of 3).

► Work Experience
► Personal Statements
► References

Notes
Find | View All
First 1 of 1 Last

***Effective Date:** 19/06/2014 ***Effective Sequence:** 1

***Notes:**

Action Required: **Outcome Code:**

User ID: PSUK Nellie, Jane

[View Printable Page](#)

Most of the fields on this page are similar to those on the UCAS Application Notes page. The UTT Application Notes page has the Degree Details region and the Work Experience region that are not applicable to UCAS.

Adding Attachments and Reviewing 3C Information for UTT Application

Access the 3C/Attachments page (**Student Admissions > UCAS Processing > UTT Application Notes > 3C/Attachments**).

This example illustrates the fields and controls on the 3C/Attachments page.

UTT Application Notes		3C/Attachments	
Name: Asha Shirley		ID: 0816	Date of Birth: 29/01/1962
Academic Institution: PSGBR PeopleSoft University UK			
UTT Personal ID: 1008696863		Personal Information	Applicant Summary
Application Code: GT01		Application Year: 2013	
Choice Details			
Round / Choice:	10	Application Number:	00026774 Maintain Applications
UTT Course:	F1X1 Chemistry	Campus:	* Choice Details
Entry Year:	2013	Entry Month:	8 Decision Entry
UTT Decision:		Reply:	
Modular:		Part Time:	CAS Details(0)
File Attachments Personalize Find View All First 1 of 1 Last			
Attachments Audit			
Attached File	View	Add Attachment	
	View	Add Attachmen	
Checklists			
Status Institution and Function			
		Checklist	Item
		Description	Due Date
		Item Status	
Comments			
Comment Category Comment ID			
		Category	Description
		Function	Date/Time
		Sequence	
Communications			
General Info Letter Details			
		Process Used	Method
		Letter Code	Direction
		Function	Assign Date/Time
		Date Completed	Sequence

The fields on this page are similar to those on the 3C/Attachments page for UCAS.

Deleting Incorrect UTT and Apply Applicant Records

Access the Wrong Applicants page (**Student Admissions > UCAS Processing > Remove Wrong Applicants > Wrong Applicants**).

This example illustrates the fields and controls on the Wrong Applicants page for UTT (Universities and Colleges Admissions Service Teacher Training) Applicant Records.

The screenshot shows the 'Wrong Applicants' page for a UTT applicant. The header 'Wrong Applicants' is in blue. Below it, the applicant's details are displayed: Name Althea Stockdale, ID 3013, Date of Birth 03/27/1982, Academic Institution PSGBR, PeopleSoft University UK, Personal ID 1008777518, Application Code GT01, and Application Year 2014. There are links for 'Personal Information' and 'Applicant Summary'. A section titled 'Wrong Applicant Details' contains the following information: Status Pending, Cancellation options (Cancelled, Mis-coded, Choice 1 Lost, Choice 2 Lost, Choice 3 Lost, Choice 4 Lost) with checkboxes, Cancellation Date 05/14/2012, and Timestamp 02/22/16 6:07:45AM. A 'Remark' field contains 'Reason for cancellation'. At the bottom are two buttons: 'Remove Applicant' and 'No Action'.

This example illustrates the fields and controls on the Wrong Applicants page for Apply Applicant Records.

The screenshot shows the 'Wrong Applicants' page for an Apply applicant. The header 'Wrong Applicants' is in blue. Below it, the applicant's details are displayed: Name Wquando Kireger, ID 3958, Date of Birth 01/02/1992, Academic Institution PSGBR, PeopleSoft University UK, Personal ID C12489, Application Code 15551, and Application Year 2021. There are links for 'Personal Information' and 'Applicant Summary'. A section titled 'Wrong Applicant Details' contains the following information: Status Removed, Cancellation options (Cancelled, Mis-coded, Choice 1 Lost, Choice 2 Lost, Choice 3 Lost, Choice 4 Lost) with checkboxes, Cancellation Date 05/04/2021. At the bottom are two buttons: 'Remove Applicant' and 'No Action'.

For UTT applications, the fields on this page are similar to those on the UCAS Wrong Applicants page.

For Apply records:

- When you click **Applicant Summary**, you're accessing Apply Applications.

- In Wrong Applicant Details, all options, except **Cancelled**, is hidden.

See also [Deleting Incorrect UCAS Applicant Records](#)

Entering an Initial Admission Decision for a UTT Application Choice

Access the UTT Initial Decision Entry page (**Student Admissions > UCAS Processing > UTT Decision Processing > Initial Decision Entry**).

This example illustrates the fields and controls on the UTT Initial Decision Entry page.

UTT Initial Decision Entry			
Name:	Carrol Gaylene	ID:	1568
Academic Institution:	PSGBR	PeopleSoft University UK	Date of Birth: 26/01/1990
UTT Personal ID:	1009698218	Personal Information	Applicant Summary
Application Code:	GT02	Application Year:	2015
Choice Details			
Round / Choice:	12	Application Number:	00027831 Maintain Applications
UTT Course:	F1X1 Chemistry	Campus:	* Choice Details
Entry Year:	2015	Entry Month:	8 Application Notes(0)
UTT Decision:		Reply:	Comments(0)
Modular:		Part Time:	CAS Details(1)
Decision Details			
*Institution Decision:	<input type="text" value="A"/> Accept	Decision Date/Time:	19/06/14 3:08:03AM
Decision Code:	<input type="text"/>		
Comment:	<input type="text"/>		
Decision Maker:	<input type="text"/>		
Approval Status:	P Awaiting Approval		

The fields on this page are similar to those on the UCAS Initial Decision Entry page. Note that the UTT Initial Decision Entry page does not display Accepted clearing choices that have a Choice Number of 99 and Decision of U.

The search results logic of the UTT Initial Decision Entry search page is similar to UCAS Initial Decision Entry search page except that the UTT search logic does not check whether the UTT choice is cancelled.

Entering or Updating an Admission Decision for a UTT Application Choice

Access the UTT Decision Processing page (**Student Admissions > UCAS Processing > UTT Decision Processing > Decision Processing**).

This example illustrates the fields and controls on the UTT Decision Processing page (1 of 3).

UTT Decision Processing

Name: Carrol Gaylene **ID:** 1568 **Date of Birth:** 26/01/1990
Academic Institution: PSGBR PeopleSoft University UK
UTT Personal ID: 1009698218 [Personal Information](#) [Applicant Summary](#)
Application Code: GT02 **Application Year:** 2015

Choice Details

Round / Choice: 13 **Application Number:** 00027980 [Maintain Applications](#)
UTT Course: G5X1 Information and **Campus:** A [Choice Details](#)
Entry Year: 2015 Communications Technology **Entry Month:** 9 [Application Notes\(0\)](#)
UTT Decision: **Reply:** [Comments\(0\)](#)
Modular: **Part Time:** [CAS Details\(1\)](#)

Qualifications

[Personalize](#) | [Find](#) | | | First 1 of 3 Last

Year	Month	Award Body	Type	Subject	Result
2013	6	OCR	GCE A Level	English Language	B
2013	6	OCR	GCE A Level	French	A
2013	6	OCR	GCE A Level	German	B

This example illustrates the fields and controls on the UTT Decision Processing page (2 of 3).

Degree Details

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

Degree Institution: University of Westminster
Highest Expected Qualification: BACHELORS Bachelors undergraduate degree
Degree Title: BSc Economics
Degree Status: H Has obtained a Degree **Degree Result:** Upper Second Class
Completion Year: 2012 **Completion Month:** 6
Degree Subject: Economics

This example illustrates the fields and controls on the UTT Decision Processing page (3 of 3).

Decision Details Find | View All First 1 of 1 Last

*Institution

Decision:

Date/Time: 19/06/14 3:10:35AM

Approval Status:

Course Change:

Modular Change:

Entry Month Change:

Decision Code:

☐ Confirmation Decision

Decision Maker:

Approver:

Campus Change:

Entry Year Change:

Part-Time Change:

Offer Details Personalize | Find | First 1 of 1 Last

Line Number	Abbrev	Grade / Mark	@ or /	Subject	End /	Text
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comment:

Free Format:

Transaction Code:

Letter Text

Most of the fields on this page are similar to the UCAS Decision Processing page. However, this page has a Clearing check box that does not appear on the UCAS Decision Processing page. The system selects the Clearing check box if ClearingStatus from ivgStarK is 2 (under consideration by institution) or 3 (accepted in clearing) and the ivgStarG Round Number is equal to or greater than the ivgStarK Round Number.

Entering a Decision for Multiple UTT Application Choices

Access the UTT Quick Decision Entry page (**Student Admissions > UCAS Processing > UTT Decision Processing > Quick Decision Entry**).

This example illustrates the fields and controls on the UTT Quick Decision Entry page.

Quick Decision Entry

*Academic Institution: PeopleSoft University UK ☐ Interview Applicants

UTT Course: Chemistry

UTT Campus:

UTT Entry Year:

Application Center:

Created Date - From: Created Date - To:

Decision:

Decision Code:

Decision Maker:

Comment:

Decision Date/Time: 19/06/14 3:32:20AM

Approval Status:

Only the first 300 results can be displayed.

UTT Personal ID	UTT Application Code	Created Date	Round / Choice	Last Name	First Name	UTT Course Code	UTT Campus	Entry Year	Entry Month	Institution Decision	Approval Status	Apply	Decision Processing
1 1009698319	GT02	15/05/2014	12	Evonne	Steve	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
2 1009776890	GT01	15/05/2014	12	Wallace	Denise	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
3 1009777022	GT01	15/05/2014	12	Clark	Nancy	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
4 1009777031	GT01	15/05/2014	12	Carnegie	Chan	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
5 1009777389	GT01	15/05/2014	12	Singh	Renata	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
6 1009777518	GT01	15/05/2014	12	Stockdale	Althea	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
7 1009777600	GT01	15/05/2014	12	Briggs	Lashell	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
8 1009777628	GT01	15/05/2014	12	Hunh	Phuong	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
9 1009777738	GT01	15/05/2014	12	Patel	Sunni	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
10 1009777765	GT01	15/05/2014	12	Richards	Victoria	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing
11 1009777839	GT01	15/05/2014	12	Moore	Camellia	F1X1	*	2015	8			<input type="button" value="Apply"/>	Decision Processing

The fields on this page are similar to those on the UCAS Quick Decision Entry page.

The search results logic of the UTT Quick Decision Entry page is similar to UCAS Quick Decision Entry page except that the UTT search logic does not check whether the UTT choice is cancelled.

Approving or Rejecting a UTT Decision

Access the UTT Decision Approval page (**Student Admissions > UCAS Processing > UTT Decision Approval > Decision Approval**).

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

UTT Decision Approval			
Name:	Carrol Gaylene	ID:	1568
Academic Institution:	PSGBR	PeopleSoft University UK	Date of Birth:
UTT Personal ID:	1009698218	Personal Information	Applicant Summary
Application Code:	GT02	Application Year:	2015
Choice Details			
Round / Choice:	12	Application Number:	00027831
UTT Course:	F1X1 Chemistry	Campus:	*
Entry Year:	2015	Entry Month:	8
UTT Decision:		Reply:	
Modular:		Part Time:	
Maintain Applications Choice Details Application Notes(0) Comments(0) CAS Details(1)			
Decision Details			
Institution Decision:	A Accept	Decision Maker:	
Decision Date/Time:	19/06/14 3:08:03AM		
Approval Status:	P Awaiting Approval	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>
Approver:	<input type="text"/>	<input type="button" value="Pending"/>	
Course Change:		Campus Change:	Modular Change:
Entry Year Change:		Entry Month Change:	Part-Time Change:
Decision Code:			
Offer Details			
Letter Text:			
Transaction Code:	<input type="text"/>		

Click Approve or Deny button to indicate whether the admission decision entered in the UTT Decision Processing or UTT Initial Decision Entry page is approved or denied.

Approving or Rejecting Multiple UTT Decisions

Access the UTT Quick Decision Approval page (**Student Admissions > UCAS Processing > UTT Decision Approval > Quick Decision Approval**).

This example illustrates the fields and controls on the UTT Quick Decision Approval page.

Quick Decision Approval

*Academic Institution: PeopleSoft University UK

UTT Course:

UTT Campus:

UTT Entry Year:

Application Center:

Approver:

Only the first 300 results can be displayed.

UTT Personal ID	UTT Application Code	Round / Choice	Last Name	First Name	UTT Course Code	UTT Campus	Entry Year	Entry Month	Institution Decision	Approval Status	Approve	Deny	Decision Processing
1 1009776881	GT01	11	Jagger	Catrice	C1X1	*	2015	9	A	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing
2 1009776890	GT01	11	Wallace	Denise	C1X1	*	2015	8	A	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing
3 1009776890	GT01	12	Wallace	Denise	F1X1	*	2015	8	A	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing
4 1009777022	GT01	11	Clark	Nancy	C1X1	*	2015	8	A	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing
5 1009698218	GT02	12	Gaylene	Carrol	F1X1	*	2015	8	A	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	Decision Processing

Entering or Updating a UTT Confirmation Decision

Access the UTT Confirmation Entry page (**Student Admissions > UCAS Processing > UTT Decision Processing > Confirmation Entry**).

This example illustrates the fields and controls on the UTT Confirmation Entry page (1 of 3).

UTT Confirmation Entry

Name: Carrol Gaylene ID: 1568 Date of Birth: 26/01/1990

Academic Institution: PSGBR PeopleSoft University UK

UTT Personal ID: 1009698218 [Personal Information](#) [Applicant Summary](#)

Application Code: GT02 Application Year: 2015

Choice Details

Round / Choice:	11	Application Number:	00027830	Maintain Applications
UTT Course:	C1X1 Biology	Campus:	*	Choice Details
Entry Year:	2015	Entry Month:	8	Application Notes(3)
UTT Decision:	Conditional Offer	Reply:	Firm	Comments(0)
Modular:		Part Time:		CAS Details(1)

Decision Confirmation

Institution Decision: A Accept

Decision Date/Time: 10/06/2014 2:32:10AM Decision Maker:

Approval Status: P Awaiting Approval Approver:

Course Change: Campus Change:

Entry Year Change: Entry Month Change:

Modular Change: Part-Time Change:

This example illustrates the fields and controls on the UTT Confirmation Entry page (2 of 3).

Qualifications					
Qualification Details			Subject Details		
Year	Month	Award Body	Type	Subject	Result
2013	6	OCR	GCE A Level	English Language	B
2013	6	OCR	GCE A Level	French	A
2013	6	OCR	GCE A Level	German	B

Degree Details			
Degree Institution:		University of Westminster	
Highest Expected Qualification:		BACHELORS Bachelors undergraduate degree	
Degree Title:		BSc Economics	
Degree Status:		H Has obtained a Degree	Degree Result: Upper Second Class
Completion Year:		2012	Completion Month: 6
Degree Subject:		Economics	

This example illustrates the fields and controls on the UTT Confirmation Entry page (3 of 3).

Letter Text	
Transaction Code:	'some offer details'
Letter Text:	some offer details

The fields on this page are similar to those on the UCAS Confirmation Entry page. Note that only application records that are CF (decision is conditional offer, and reply is firm) or DF appear on the UTT Confirmation Entry page regardless of whether a confirmation decision is pending or has been entered. Also, application records for which a conditional offer has been made during Clearing appear on this page.

Entering Multiple UTT Confirmation Decisions

Access the UTT Quick Confirmation page (**Student Admissions > UCAS Processing > UTT Decision Processing > Quick Confirmation**).

This example illustrates the fields and controls on the UTT Quick Confirmation page.

UTT Quick Confirmation

*Academic Institution PeopleSoft University UK

UTT Course

UTT Campus

UTT Entry Year

Application Center

Decision Maker Decision Date/Time 22/06/14 9:34:06PM

Only the first 300 results can be displayed.

UTT Personal ID	UTT Application Code	Round / Choice	Last Name	First Name	UTT Course	UTT Campus	Entry Year	Accept	Reject	Decision	Reply	Confirmation Details
1 1009776881	GT01	13	Jagger	Catrice	G5X1	A	2015	<input type="button" value="Accept"/>	<input type="button" value="Reject"/>	C	F	Confirmation Details

The fields on this page are similar to those on the UCAS Quick Confirmation page.

The search results logic of the UTT Quick Confirmation page is similar to UCAS Quick Confirmation page except that the UTT search logic does not check whether the UTT choice is cancelled.

Approving or Rejecting a UTT Confirmation Decision

Access the UTT Confirmation Approval page (**Student Admissions > UCAS Processing > UTT Decision Approval > Confirmation Approval**).

This example illustrates the fields and controls on the UTT Confirmation Approval page.

UTT Confirmation Approval			
Name:	Carrol Gaylene	ID:	1568
Academic Institution:	PSGBR	PeopleSoft University UK	Date of Birth: 26/01/1990
UTT Personal ID:	1009698218	Personal Information	Applicant Summary
Application Code:	GT02	Application Year:	2015
Choice Details			
Round / Choice:	11	Application Number:	00027830 Maintain Applications
UTT Course:	C1X1 Biology	Campus:	* Choice Details
Entry Year:	2015	Entry Month:	8 Application Notes(3)
UTT Decision:	Conditional Offer	Reply:	Firm Comments(0)
Modular:		Part Time:	CAS Details(1)
Decision Confirmation			
Institution Decision:	A Accept	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>
Decision Date/Time:	10/06/14 2:32:10AM	Decision Maker:	
Approval Status:	P Awaiting Approval	Approver:	<input type="text"/>
Course Change:		Campus Change:	
Entry Year Change:		Entry Month Change:	
Modular Change:		Part-Time Change:	
▼ Degree Details Find View All First 1 of 1 Last			
Degree Institution:	University of Westminster		
Highest Expected Qualification:	BACHELORS Bachelors undergraduate degree		
Degree Title:	BSc Economics		
Degree Status:	H Has obtained a Degree	Degree Result:	Upper Second Class
Completion Year:	2012	Completion Month:	6
Degree Subject:	<input type="text" value="Economics"/>		
▼ Letter Text			
Transaction Code:	<input type="text" value="'some offer details'"/>		
Letter Text:	some offer details		

Approving or Rejecting Multiple UTT Confirmation Decisions

Access the UTT Quick Confirmation Approval page (**Student Admissions > UCAS Processing > UTT Decision Approval > Quick Confirmation Approval**).

This example illustrates the fields and controls on the UTT Quick Confirmation Approval page.

Quick Confirmation Approval

*Academic Institution PeopleSoft University UK

UTT Course

UTT Campus

UTT Entry Year

Application Center

[Search Decisions](#)

Approver

Only the first 300 results can be displayed.

UTT Personal ID	UTT Application Code	Round / Choice	Last Name	First Name	UTT Course	UTI Campus	Entry Year	Decision	Approve	Deny	Approval Status	Reply	Confirmation Details
1	1009698218	GT02	Gaylene	Carrol	C1X1	*	2015	A	Approve	Deny	P	F	Confirmation Details

Entering UTT Clearing Details

Access the UTT Enquiry Entry page (**Student Admissions > UCAS Processing > UTT Decision Processing > Enquiry Entry**).

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

UTT Enquiry Entry

Academic Institution: PSGBR PeopleSoft University UK

Enquiry ID: 1

Personal ID: 0900023437

*Application Year: 2015

Application Code: GT01

*Surname: Pattison Title: Miss

*Forenames: Leyla Arrianne

Date of Birth: 07/08/1984

Gender: Female

UTT Course Code: F3X1 Physics

UTT Campus: *

UTT Entry Year: 2015

Entry Month:

☐ Modular ☐ Part Time

Transaction Type: RX Clearing Decision

Decision: U Unconditional Offer

Decision Maker: 0022 Andrea Ashford

Decision Date/Time:

Transaction Code:

▼ Contact Details

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Country Code: Postcode:

Telephone:

Email ID:

▼ Notes

Notes:

The Personal ID and Application Code fields look up values directly from the UCAS cvgName view.

Use the Transaction Type field to create a RX transaction for a Clearing enquiry. Use the Decision field to enter U (Unconditional) or C (Conditional). After you record the Clearing details, run the Transaction Processing process to generate the Clearing transactions to send to UCAS.

If you want to record a RX transaction, the UCAS Personal ID, UCAS Application Code, UTT Course Code, Entry Year, Entry Month, Modular, Part Time, and Decision fields are required.

Reviewing and Updating UTT Qualifications

Access the UTT Qualifications page (**Student Admissions > UCAS Processing > UTT Decision Processing > Qualifications**)

This example illustrates the fields and controls on the UTT Qualifications page.

UTT Qualifications

Name: Denise Wallace **ID:** 1423 **Date of Birth:** 30/03/1990
Academic Institution: PSGBR PeopleSoft University UK
Personal ID: 1009776890 [Personal Information](#) [Applicant Summary](#)
Application Code: GT01 **Application Year:** 2015

Qualifications							Personalize	Find	First	1-3 of 3	Last
Qualification Details				Subject Details							
Year	Month	Award Body	Type	Subject	Result						
2013	6	OCR	GCE A Level	English Language	B		+	-			
2013	6	OCR	GCE A Level	French	A		+	-			
2013	6	OCR	GCE A Level	German	B		+	-			

Reviewing UTT Transactions

Access the UTT Transactions page (**Student Admissions > UCAS Processing > Transaction Processing > UTT Transactions**).

This example illustrates the fields and controls on the UTT Transactions page.

UTT Transactions			
Name:	Catrice Jagger	ID:	1422
Academic Institution:	PSGBR	PeopleSoft University UK	Date of Birth:
UTT Personal ID:	1009776881	Personal Information	Applicant Summary
Application Code:	GT01	Application Year:	2015
Choice Details			
Round / Choice:	13	Application Number:	00027834
UTT Course:	G5X1 Information and Communications Technology	Campus:	A
Entry Year:	2015	Entry Month:	9
UTT Decision:	Unconditional Offer	Reply:	Firm
Modular:		Part Time:	
Decision Details			
Institution Decision:	C Conditional Offer	Decision Maker:	
Decision Date/Time:	27/05/14 4:23:08AM	Approver:	
Approval Status:	N Not Required	Campus Change:	Modular Change:
Course Change:		Entry Year Change:	Entry Month Change:
			Part-Time Change:
Decision Code:			
Transaction Details			
Transaction Type:	LD Decision	Transaction ID:	500
Error Code:	0	Error Position:	
Decision:	C Conditional Offer	Created Date:	29/05/14 6:59:28AM
Course:		Campus:	Modular:
Entry Year:		Entry Month:	Part Time:
Transaction Code:	<input type="text" value="some conditions"/>		<input checked="" type="checkbox"/> Auto <input checked="" type="checkbox"/> Sent <input type="checkbox"/> Hold <input type="checkbox"/> Obsolete

The functionality of the UTT transactions page is similar to that of the UCAS Transactions page. Additionally, most of the fields on the UTT Transactions page are similar to those on the UCAS Transactions page.

When the decision is Interview, ensure that the interview date entered in the Transaction Code area contains only the date without the time element.

Reviewing UTT Clearing Transactions

Access the UTT Enquiry Transactions page (**Student Admissions > UCAS Processing > Transaction Processing > UTT Enquiry Transactions**).

This example illustrates the fields and controls on the UTT Enquiry Transactions page.

UTT Enquiry Transactions

Name:	Warda	Wardrope	Date of Birth:	10/07/1989
Academic Institution:	PSGBR	PeopleSoft University UK	Enquiry ID:	1
Personal ID:	0900023675	Application Code:	GT01	
UTT Course Code:	G5X1	Computing	UTT Campus:	* Clearing Entry
UTT Entry Year:	2015	Entry Month:	8	

Transaction Details

Find | View All First 1 of 1 Last

*Transaction Type:	<input type="text" value="RX"/> Clearing Decision	Transaction ID:	<input type="text" value=""/>
Error Code:	-1	Error Position:	
Decision:	<input type="text" value="U"/> Unconditional Offer	Created Date:	20/06/14 7:36:06AM <input type="checkbox"/> Auto
Course:	<input type="text" value="G5X1"/> Computing	Campus:	<input type="text" value=""/> <input type="checkbox"/> Sent
Entry Year:	<input type="text" value="2015"/>	Entry Month:	<input type="text" value="8"/> <input type="checkbox"/> Hold
Modular:	<input type="text" value="Y"/> Change to Modular	Part Time:	<input type="text" value="F"/> Full time Only <input type="checkbox"/> Obsolete
Transaction Code:	<input type="text" value=""/>		

Most of the fields on the UTT Enquiry Transactions page are similar to those on the UTT Transactions page.

Connecting to the Apply API

This section describes additional procedures to connect to the Apply API as well as troubleshooting information.

Configuring the Integration Broker

You need to set up these elements to ensure that you can connect to the Apply API.

Updating the REST Base URL

1. Go to **PeopleTools >Integration Broker >Integration Setup >Service Operations**.
2. In Service Operation, search for *SAD_UC_DFE_APPL_GET*.
3. Click **Search**.
4. In the results, click the service operation name.
5. In **REST Base URL**, provide the new URL.
6. Click **Save**.
7. Repeat steps 2 to 6 for *SAD_UC_DFE_APPL_POST*.

Configuring the Routing Definition

You must set up the routing to connect to the API.

1. Go to **PeopleTools >Integration Broker >Integration Setup >Routings**.
2. Click **Add New Value**.
3. In Routing Name, enter **SAD_UC_DFE_GET_APPL**.
4. Click **Add**.
5. From the Routing Definitions page, provide these values:
 - Service Operation: SAD_UC_DFE_APPL_GET
 - Version: This field is automatically populated when you select the service operation.
 - Description: DFE Get Applications
 - Sender Node: Select the local node for the environment.
 - Receiver Node: WADL_NODE
 - Owner ID: Admissions — UK
6. Click **Parameters**.
 - a. In Outbound Request, **Message.Ver into Transform 1**, remove any value (if there's any).
 - b. In Inbound Response, **Message.Ver out of Transforms**, remove any value (if there's any).
7. Click **Connector Properties**.
 - a. In Gateway ID, enter *LOCAL*.
 - b. In Connector ID, enter *HTTPTARGET*.
 - c. In Delivery Mode, select *Guaranteed Delivery*.
 - d. In Connector Properties, delete any rows with values.
8. Click **Save**.
9. Repeat steps 3 to 7 for:
 - Routing Name: SAD_UC_DFE_GET_POST
 - Service Operation: SAD_UC_DFE_APPL_POST
 - Description: DFE Post Applications

Configuring the Gateway

1. Go to **PeopleTools >Integration Broker >Configuration >Gateways**.

2. In Integration Gateway ID begins with, enter *LOCAL*.
3. Click **Search**.
4. From the Gateways page, click **Gateway Setup Properties**.
5. Enter your user ID and password.
6. Click **Advanced Properties Page**.
7. In Gateway Properties, scroll to the end of the box and look for **UseDomainName.ExternalOperationNames**.

The line looks similar to this:

```
#ig.UseDomainName.ExternalOperationNames=MYSOP1.v1,MYSOP2.v1.
```

8. When you locate the line:
 - Remove the hashtag.
 - Replace *MYSOP1.v1,MYSOP2.v1* with *SAD_UC_DFE_APPL_GET.v1,SAD_UC_DFE_APPL_POST.v1*.

It should look like this:

```
ig.UseDomainName.ExternalOperationNames=SAD_UC_DFE_APPL_GET.v1,SAD_UC_DFE_APPL_POST.v1
```

9. Click **OK**.
10. On the PeopleSoft Node Configuration page, click **Save**.
11. On the Gateways page, click **Save**.

Testing Your Connection

1. Go to **PeopleTools >Integration Broker >Service Utilities >Service Operation Tester**.
2. In Service, enter *SAD_UC_DFE_API*.
3. Click **Search**.
4. From the results, click the service operation name.
5. From the Service Operation page, click **Populate Document Template**.
6. From the URI Template Builder page, click **since**.
7. From the Set Value page, in Long, enter *2020-01-01T10:00:00Z*.
8. Click **OK**, then click **Return**.
9. Click **Invoke Operation**.

You may get a 401 unauthorized error message. This is okay; it means that a connection to the Apply API was successfully established.

Troubleshooting

Here's what you can do when you see these errors.

HTTPS Hostname Wrong

To resolve the error logged as Integration Gateway - External System Contact Error (158,10721), update your gateway configuration. See [Configuring the Integration Broker](#), "Configuring the Gateway."

Untrusted Server Certificate Chain

To resolve this issue, you must upload the DFE API root certificate to your web server keystore.

Note: These steps assume you're using Firefox as your browser. If you use another browser, you may have to determine the corresponding steps.

1. On your browser, enter the REST base URL in the address field, then press **Enter**.

This is the same URL you used in "Updating the REST Base URL."

2. In the URL field where you entered the REST base URL, click the lock icon. This icon is located on the left of the URL.
3. In Connection, click the arrow to show connection details.
4. Click **More Information**.
5. From the window that appears, click **View Certificate**.

The Certificate Viewer appears.

6. Click **Details**.
7. In Certificate Hierarchy, select the topmost certificate: **GlobalSign Root CA - R3**.
8. Click **Export**, then save the certificate to a place in your hard drive.

If necessary, save the certificate as *GlobalSign Root CA - R3.crt*.

9. Using an FTP client, upload the certificate to your web server keystore folder. This is the path: `/opt/oracle/psft/pt/cfghome/webserv/peoplesoft/piaconfig/keystore`.
10. Using PuTTY, import the certificate to your keystore folder. Enter this on the command line:

```
keytool -import -v -alias "GlobalSignRootCA-R3" -keystore /opt/oracle/psft/pt/cfghome/
webserv/peoplesoft/piaconfig/keystore/pskey -storepass Passw0rd -file /opt/oracle/psft/pt/
cfghome/webserv/peoplesoft/piaconfig/keystore/GlobalSignRootCA-R3.crt -trustacerts
```

11. If the certificate already exists and you're asked if you still want to add it or whether you trust this certificate, answer *Yes*.

You should see this message: Certificate was added to keystore.

12. Bounce the web server, application server, and process server.
13. Log in to PIA, then go to **PeopleTools >Security >Security Objects >Digital Certificates**.

14. Add a new row:

- Type: RootCA
- Alias: GlobalSignRootCA-R3

This is the alias you used when you imported the certificate to your keystore folder.

15. Click **Add Root**.

16. Using a text editor, open the certificate you saved (step 8) and copy the entire content of the file.

17. On the Add Root Certificate page, paste the certificate content in the text box.

18. Click OK.

19. Bounce the web server, application server, and process server.

20. Test your connection to the API. See [Configuring the Integration Broker](#), “Testing Your Connection.”

(GBR) Managing PBI Data Exchange

Understanding PBI Data Exchange

Campus Solutions provides the following processing capabilities to support institutions with the Tier 4 student visa requirements of the United Kingdom Visas and Immigration (UKVI):

- The collection of the data from overseas applicants and continuing students to allow Confirmation of Acceptance for Studies (CAS) requests to be submitted in bulk to the UKVI via the Sponsor Management System (SMS).
- The creation of XML files to transfer to SMS using Bulk Upload to request one or more CAS numbers.
- The import of CAS details from XML files created by SMS using Bulk Export after the UKVI has assigned CAS numbers.
- The generation of communications to notify an applicant or student of their assigned CAS number.
- The creation of XML files to transfer to SMS using Bulk Update in cases where the amount of fees paid by the applicant or student has changed after the CAS number has been assigned.
- The generation of communications to notify an applicant or student of the changed fee details.
- The creation of XML files to transfer to SMS using Bulk Report to report on applicants or students who have not enrolled or are not in attendance at your institution.

The following is an overview of how CAS requests are processed:

1. The institution creates CAS Details records in Campus Solutions for overseas applicants that require a student visa or for continuing students that require an extension to an existing visa. The CAS Details record can be created at the point the application is received or the institution may wish to wait until the applicant has accepted an offer of admission before creating the record.
2. The institution requests the CAS number for the applicant or student either by submitting a bulk upload XML file created from Campus Solutions to SMS or by submitting an individual request for an applicant or student directly to the UKVI portal.
3. SMS processes each record and, if the processing is successful, assigns a CAS number and status (Assigned) to each record. The institution can use Campus Solutions to import these updates, which contain the CAS number, from a bulk export XML file generated from SMS.
4. The institution is responsible for passing the CAS number on to the applicant or student.
5. The applicant or student can then use the CAS number to apply for his or her student visa.
6. The institution can modify existing CAS records in SMS (for example, when students pay the tuition fees and you want to modify the CAS records for these students in SMS). To update the CAS records

the institution can use Campus Solutions to create a Bulk Update XML file and submit the file to SMS.

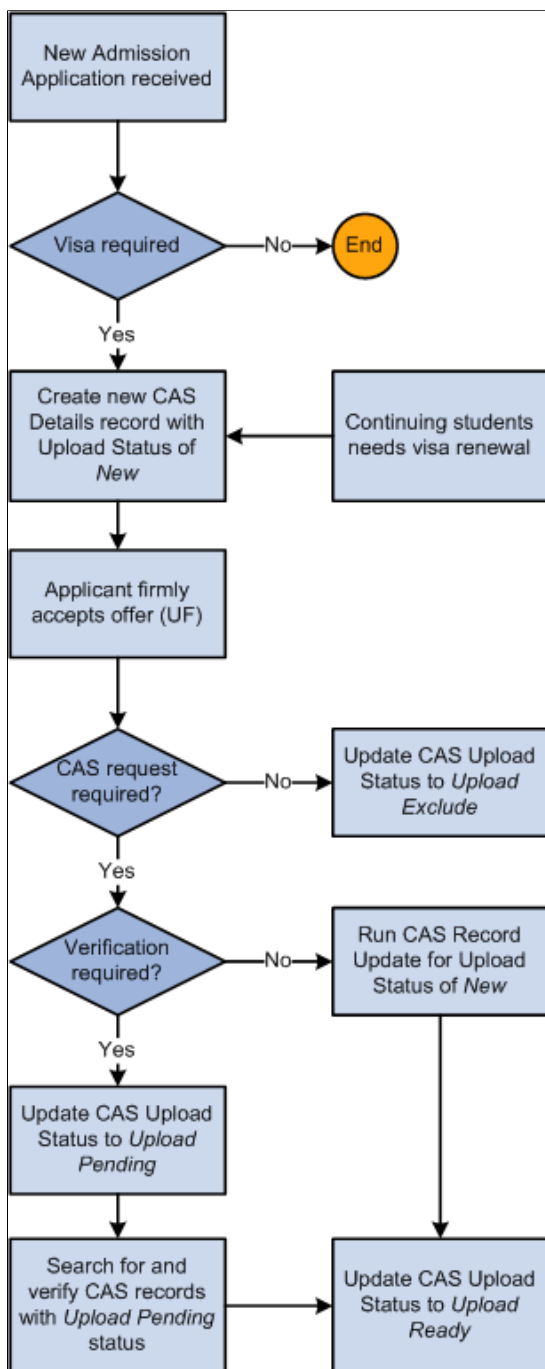
7. When the applicant or student submits the visa application, UKVI updates the CAS status in SMS to Used. The institution can view the updated CAS record by signing into SMS or by using Campus Solutions to import the updated records from a bulk export XML file generated from SMS.
8. The institution can use Campus Solutions to fulfill their reporting duties for applicant or student who have failed to enroll or are not in attendance. The institution can use Campus Solutions to create a Bulk Report XML file that contains data of students who have used a CAS number supplied by the institution but have not registered or enrolled.

Note: The academic institution and SMS exchanges the applicant and student data in XML format. Review the Bulk Data Transfer Toolkit available from the UKVI website. This toolkit provides details on the XML files such as the XML schema, examples of export and import XML files, and validation rules.

See the UK Visas and Immigration website

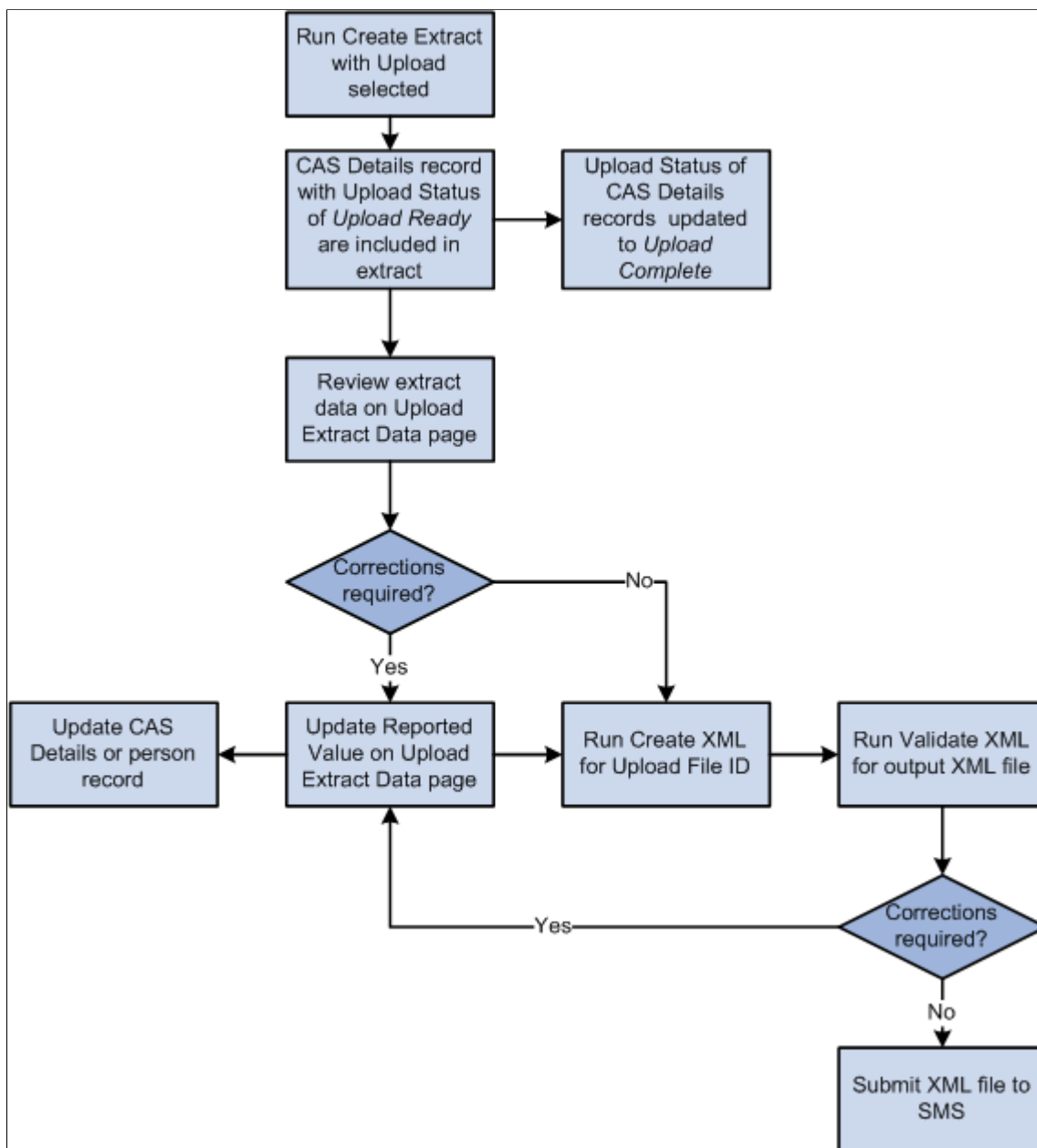
The CAS Maintenance component and the CAS Record Update process are used to create and manage CAS Details records and prepare records for inclusion a Bulk Upload file to request CAS numbers from the UKVI. An optional verification step can be built into the process to allow the request details to be reviewed before the request is sent.

This diagram illustrates the process for creating and maintaining CAS Details records.



Once records are ready to be sent to the UKVI the Create Extract process, the Upload Extract Data component and the Create and Validate XML processes are used to create and review upload records and to generate the XML file for transfer to SMS.

This diagram illustrates the process for creating and sending the Bulk Upload XML file to SMS.

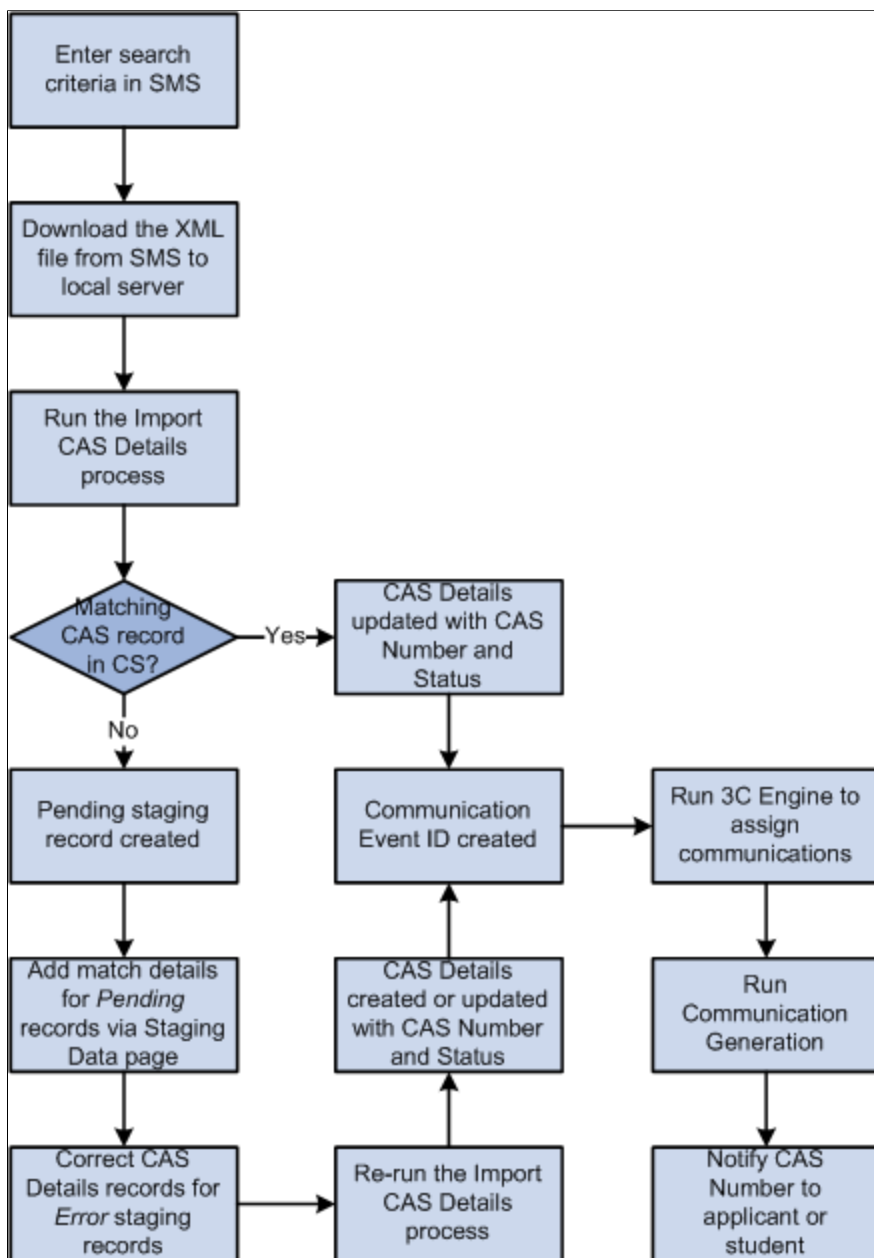


After you submit the CAS number requests to SMS, the UKVI assigns a CAS number to the applicant or student. You can generate a Bulk Export XML file from SMS and import the details using the Import CAS Details process.

Download the XML file and load the XML data into Campus Solutions using the import process. The process will update the CAS Number and CAS Status details for matched. Unmatched records can be reviewed using the CAS Staging Data component, match details added and the records re-processed.

You can also import subsequent CAS status changes from SMS when the UKVI updates the status to one of the post-assigned values: *Used* (when the applicant has used the CAS number to apply for a visa), *Cancelled*, *Expired*, *Obsolete* and *Withdrawn*.

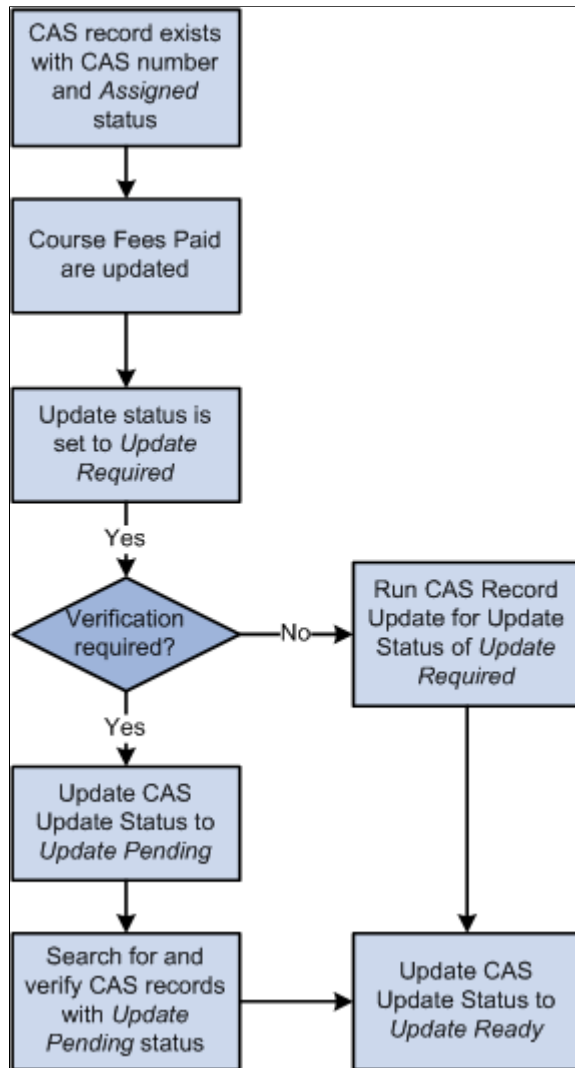
This diagram illustrates the process for importing CAS Details.



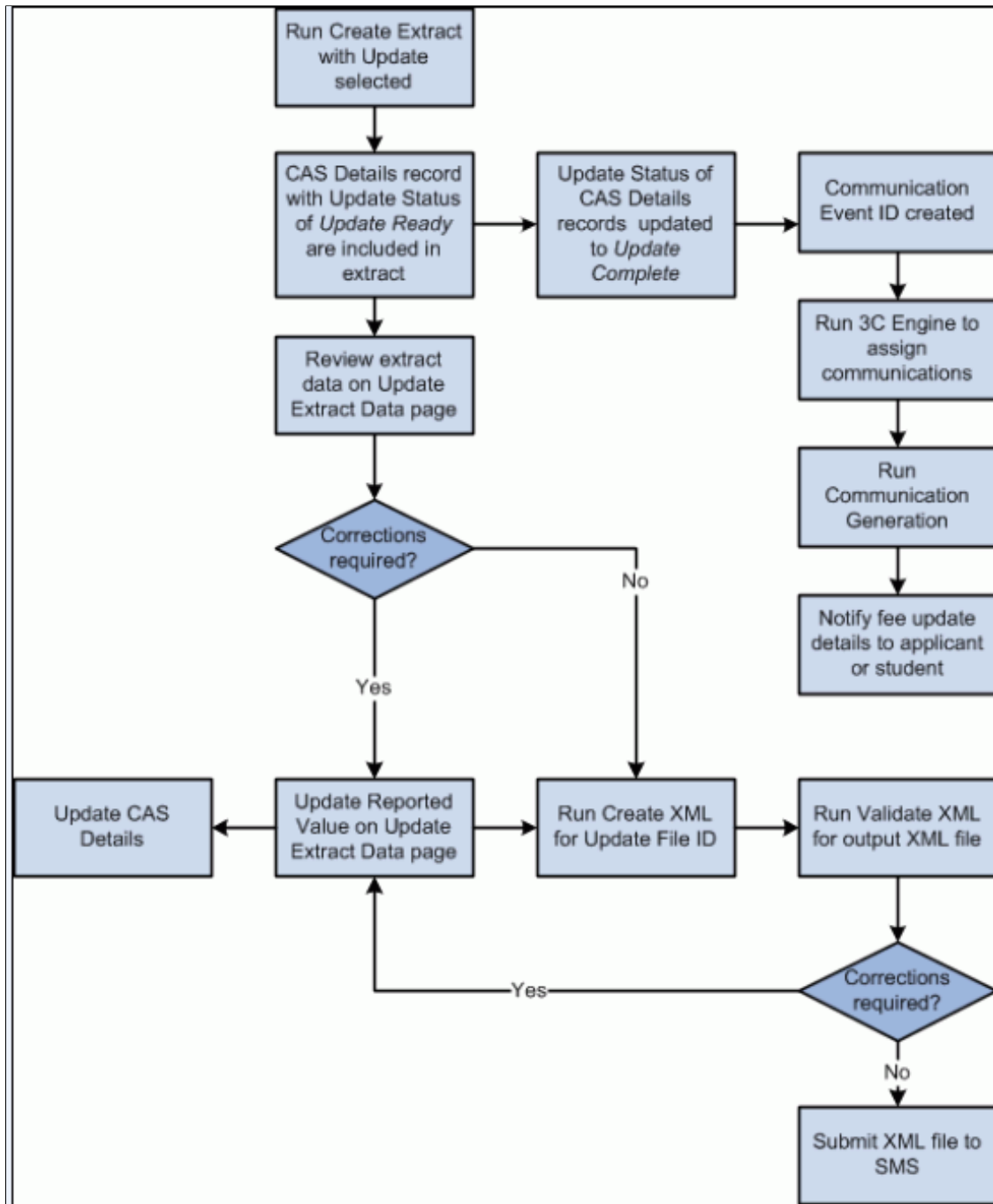
Once the CAS number has been assigned any changes to the fees paid fields need to be reported to the UKVI via the Bulk Update file. When any of the fees paid fields is updated for CAS records that have a CAS number, the system automatically sets the Update Status to the status defined for Update Required. The Create Extract process can then be run to select these records for inclusion in the Bulk Update XML file. You can choose to follow an optional verification step before setting the Update Status to Update Ready.

While the CAS status is Assigned a CAS record can be included in multiple Bulk Updates as the fees paid values change over time. Once the CAS Status is updated to one of the post-assigned values then further updates for the fees paid fields are not required.

This diagram illustrates the process for preparing CAS records for inclusion in the Bulk Update XML file.

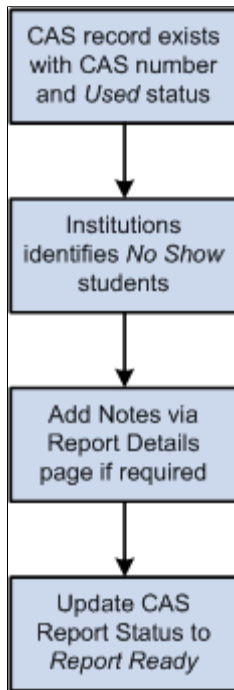


This diagram illustrates the process for creating the Bulk Update XML file.

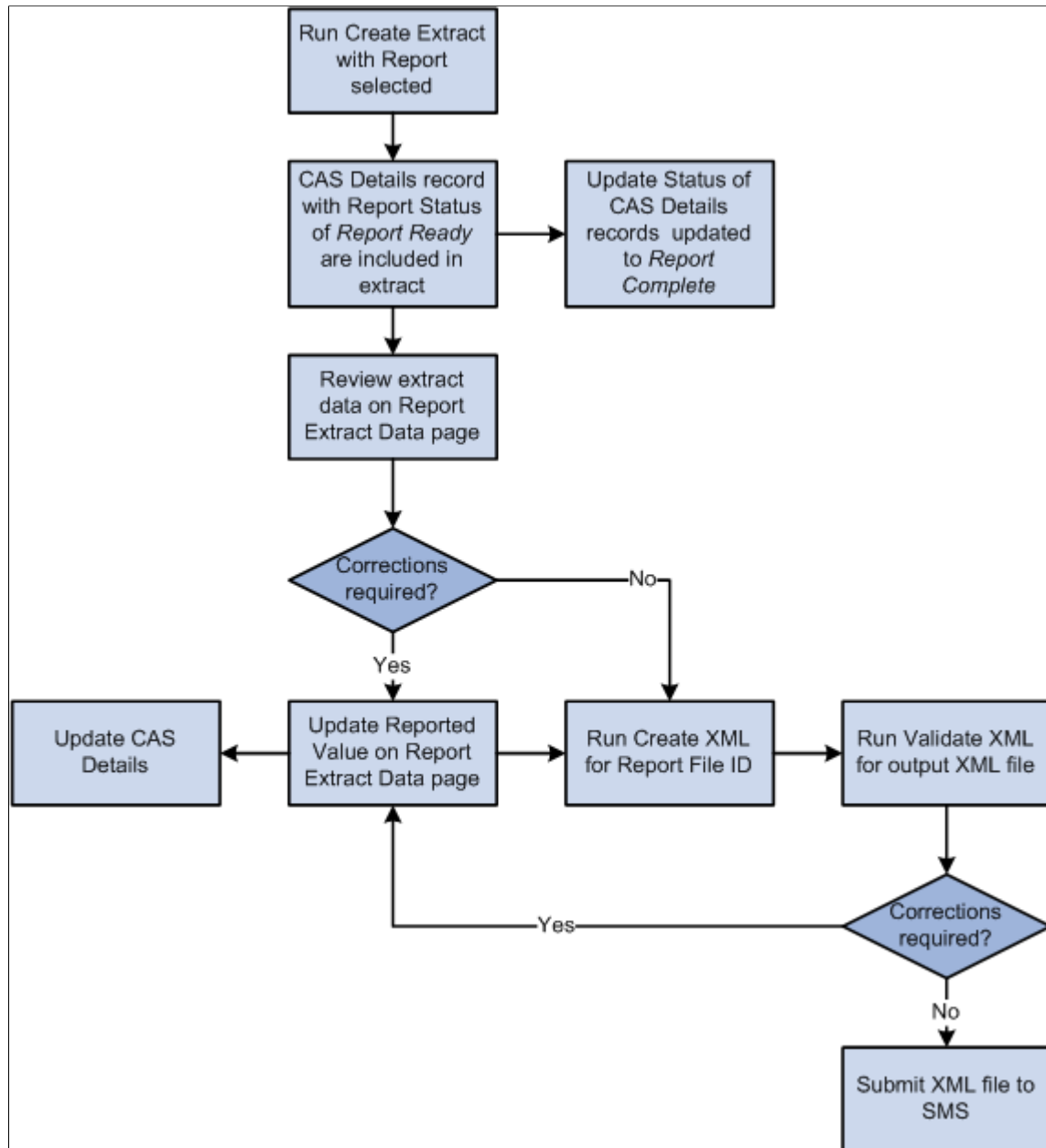


CAS records need to be submitted to SMS in the Bulk Report file if the applicant or student has used the CAS number in their visa application but is not attending your institution. You can set the Report Status to indicate the applicant or student is not attending. Once you have set this status, the Create Extract Data process can be used to select record for inclusion in the Bulk Report XML file.

This diagram illustrates the process for preparing records for inclusion in the Bulk Report XML file.



This diagram illustrates the process for creating the Bulk Report XML file.



See [Understanding PBI Field Derivation](#)

Preparing for PBI Data Exchange

Before you start importing and exporting SMS data, you must set up Campus Solutions as follows:

- Enable the PBI functionality for all institutions or for a specific institution.
- Set up a PBI configuration record.
- Set up CAS statuses.

- Define the UKVI Sponsor License Number for partner institutions.
- Enter the PBI data for academic programs.
- Enter the PBI data for academic plans.
- Set up PBI communications.
- Configuring common attributes for PBI.

Defining field values at the configuration level

You can define default values for fields in the Upload extract on the PBI Configuration page if you do not want to specify field values separately at the program and plan levels or at the individual CAS record level.

Defining field values at the academic program and plan levels

For a particular academic program or plan, the value that your institution wants to include in the Upload or Update extract for one or more fields may be the same for all the applicants or students for that academic program or plan. Use the Academic Program and Academic Plan PBI Data pages to define field values at program and plan level respectively, rather than using the CAS Maintenance component to enter field values for each individual applicant or student.

If the same value applies to all academic plans associated with an academic program the value can be defined at academic program level only. The defined values are used to default the values for the corresponding fields when a new CAS Details record is created.

Defining field values at the CAS record level

You can choose to enter or update field values at the applicant or student level using the CAS Maintenance component.

See [Creating and Maintaining CAS Details](#)

Note

For most fields the extract process will first look at the CAS Details record to derive a field value. In most cases if a default value has been defined at Academic Plan, Academic Program or Configuration level then the field will be automatically populated in the CAS Details record when it is created. For some fields if a value has not been defined at that CAS Details level, then the process will look at the Academic Plan level. If a value has not been defined at the Academic Plan level, then it looks at the Academic Program level. If a value has not been defined at Academic Program level, finally it derives the field value from the Configuration level.

Refer to the PBI Field Derivation documentation for information about derivation of the individual fields.

Pages Used to Prepare for PBI Data Exchange

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SA Features	SCC_INSTALL_SA2	Set Up SACR > Install > Student Admin Installation > SA Features	Enable the PBI pages and links in Campus Solutions.
Academic Institution 6	SSR_INST_FEATURES	Set Up SACR > Foundation Tables > Academic Structure > Academic Institution Table > Academic Institution 6	Enable the PBI pages and links in Campus Solutions for a specific institution.
PBI Configuration	SAD_PB_CONFIG	Student Admissions > PBI Processing > PBI Configuration	Create a PBI configuration record. Enter the sponsor license numbers of your institution and campuses. Also, specify field and course date defaults, and applicant and student communication details.
Statuses	SAD_PB_CONFIG1	Student Admissions > PBI Processing > PBI Configuration > Statuses	Define the various processing statuses for CAS records.
Regional	SAD_UC_SCHOOL_SBP	Campus Community > Organization > Create/Maintain Organizations > Organization Table > Regional	Define the UKVI Sponsor License Number for an external organization being reported to UKVI as a Partner Institution.
Academic Program PBI Data	SAD_PB_PROG	Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > PBI Data	Specify field values at program level.
Academic Plan PBI Data	SAD_PB_PLAN	Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > PBI Data	Specify field values at plan level.

Enabling the UK Fields for All Institutions

Access the SA Features page (**Set Up SACR > Install > Student Admin Installation > SA Features**).

Select the PBI check box to enable PBI pages, fields, and links fields in Campus Solutions.

Enabling the UK Fields for a Specific Institution

Access the Academic Institution 6 page (**Set Up SACR > Foundation Tables > Academic Structure > Academic Institution Table > Academic Institution 6**).

Select the PBI check box to enable PBI pages, fields, and links in Campus Solutions for a specific institution.

Setting Up a PBI Configuration Record

Access the PBI Configuration page (**Student Admissions > PBI Processing > PBI Configuration**).

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

PBI Configuration | **Statuses**

Academic Institution: PeopleSoft University UK ☐ Enable Sub-Plan Reporting

*Sponsor Licence Number: 545645656 *Tier ID: Tier 4

*Category: General *Schema ID: T4General Ready To Go

Main Site of Study: PSCSGBR1

Field Defaults

Work Placement: No ATAS Certificate Required: No

Accommodation Provided: No Dean's Certificate Required: No

Previous UK Study: No Accommodation Fees Included: No

SELT Required: No

Admit Term Defaults

*Admit Term	Cohort Tag	Course Fees	Boarding Fees	Start Date	Latest Acceptance	Expected Enrollment	Expected End
2160		16200.00	1620.00	08/30/2016	09/15/2016	09/05/2016	07/31/2019
2150		12700.00		10/01/2015	11/30/2015	10/01/2015	07/31/2018
2140		12000.00		10/01/2014	11/30/2014	10/01/2014	07/31/2017
2130		10500.00		10/01/2013	11/30/2013	10/01/2013	07/31/2016
2120		9500.00		10/01/2012	11/30/2012	10/01/2012	07/31/2015
2110		9100.00		10/01/2011	11/30/2011	10/01/2011	07/31/2014
2100		8900.00		10/01/2010	10/30/2010	10/01/2010	07/31/2013

Communication Details

*Notification Type: CAS Number *Record Type: Applicant Event ID: Description

Campus Details

*Campus: Description: *Sponsor Licence Number:

Field or Control	Description
Enable Sub-Plan Reporting	Select the check box for Sub-Plans to be considered in the derivation of Course Title in the Upload extract.
Sponsor License Number	Enter your institution's license number. The value is used to derive the corresponding field in the Upload extract.

Use the Tier ID, Category and Schema ID fields to specify the values that are used to derive the corresponding fields in the Upload extract.

Field or Control	Description
Main Site of Study	Enter the Location if the same Main Site details are reported in the Upload extract for all CAS records for your institution. The value is displayed as the default Main Site on the CAS Details page. The value is used in the derivation of the Main Site address fields in the Upload extract if no Reported Site is defined in the individual CAS Details record.

Field Defaults

Use this region to specify default field values for new CAS records. The system uses a Field Defaults value as a default value in a new CAS Details record only if the value is not defined at the program or plan level.

Admit Term Defaults

For each term, define the values that are used to populate the fees and course date fields in new CAS records if no values are defined at plan or program level. The Latest Acceptance Date should be on or after the Course Start Date.

Field or Control	Description
Cohort Tag	<p>(Optional) Select the appropriate cohort tag as set up for your institution.</p> <p>Use this field to allow different dates and fees to be defined for different cohorts within the same Admit Term. The value you set in this field is used by the CAS Details component as well as the processes that are used to add new CAS records to evaluate the default dates and fees for an applicant or student.</p>

Communication Details

Use this region to set up the event IDs that are used in the communication generation process to notify applicants or students about their CAS number or fee updates.

Field or Control	Description
Notification Type	Indicate whether you want to notify <i>CAS Number</i> or <i>Fee Update</i> .
Record Type	Indicate whether you want to notify the applicant or student.

Field or Control	Description
Event ID	<p>Select the event ID that you want the system to assign the applicant or student.</p> <p>You can select only event IDs defined for the CASN administrative function in Campus Community. The CASN function captures Academic Career, Career Number and CAS Number as variable data. Refer to "Setting Up PBI Communications" in this section for information about the event ID setups.</p>

The system assigns an event ID for *CAS Number* notification type to a person when the Import CAS Details process loads the CAS number from the inbound XML file for the first time.

For more information about how the process assigns event IDs for CAS Number notification, see [Importing CAS Details](#).

The system assigns an event ID for *Fee Update* notification type when the Create Extract process creates the update extract data.

You can create one or more communication records using the Communication Generation process to notify applicants or students about their CAS number or fee updates.

Campus Details

Use this region to specify Sponsor Licence Numbers for individual Campuses if your institution has a different licence number for a particular campus. The value is used to derive the corresponding field in the Upload extract based on the Campus value of the applicant or student in place of the value defined for your institution. If no value is defined the value defined for the institution is used.

Setting up CAS Statuses

Access the Statuses page (**Student Admissions > PBI Processing > PBI Configuration > Statuses**).

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

The screenshot shows the 'Statuses' tab in the PBI Configuration section. It contains the following fields and controls:

- *Academic Institution:** PeopleSoft University
- ☒ **Apply Academic Org Security**
- New CAS Record:** New
- *Upload Ready:** Upload Ready
- *Update Required:** Update Required
- *Update Ready:** Update Ready
- *Report Ready:** Report Ready
- *Upload Complete:** Upload Complete
- *Update Complete:** Update Complete
- *Report Complete:** Report Complete

Field or Control	Description
Apply Academic Org Security (apply academic organization security)	<p>Select to have the Create Extract process choose only that CAS record for which the user ID has access to at least one academic organization.</p> <p>Clear this check box if you want the process to choose a CAS record regardless of whether the user ID has access to the related academic organization.</p> <p>Refer to the following "Applying Academic Organization Security to the Create Extract Process" topic for more information about this setup.</p>
New CAS Record	Choose an Upload status value that the system assigns to new CAS records. If you do not choose a value, the system assigns a blank Upload status.
Upload Ready	Choose an Upload status value. The Create Extract Data process uses this value to select CAS records for inclusion in the Upload extract.
Upload Complete	Choose an Upload status value. The Create Extract Data process uses this value to create a new effective dated record to indicate that a CAS record has been included in the Upload extract.
Update Required	Choose an Update status value that the system assigns to CAS records where the CAS number has been imported and a subsequent change is made to one of the fees paid fields.
Update Ready	Choose an Update status value. The Create Extract Data process uses this value to select records for inclusion in the Update extract.
Update Complete	Choose an Update status value. The Create Extract Data process uses this value to create a new effective dated record to indicate that a CAS record has been included in the Update extract.
Report Ready	Choose a Report status value. The user uses this value to indicate that a record is ready to be included in the Report extract. The Create Extract Data process uses this value to select records for inclusion in the Report extract.
Report Complete	Choose a Report status value. The Create Extract Data process uses this value to create a new effective dated record to indicate that a CAS record has been included in the Report extract.

Statuses are delivered as translate values for Upload (SAD_PB_UPLOAD), Update (SAD_PB_UPDATE) and Report (SAD_PB_REPORT). You can amend or add to the translate values as required.

If additional verification steps are required before a CAS record is ready for inclusion in the Upload extract, additional interim statuses can be defined and used to manage individual CAS records. Additional statuses can be defined and used to prevent CAS records from being included in the Upload extract if required.

If a verification step is required between one of the fees paid values being updated and the record being included in the Update extract, different status values can be defined for Update Required and Update Ready. If no verification step is required the same status value for Update Ready can be used for both fields.

Note: To allow records to be retrieved using the single Processing Status search field in the CAS Maintenance component it is recommended that distinct status values are defined for Upload, Update and Extract.

The following is a scenario on how the statuses work where there are verification steps before a CAS record is included in an extract:

1. Use PeopleTools to create additional status values required. For example: new Upload Statuses of *Upload Exclude* and *Upload Pending* and a new Update Status of *Update Pending*.
2. Use the Statuses page to define the required values.
3. Use the CAS Maintenance component to create CAS records. The Upload Status is automatically set to *New* when you create the records.
4. Use the CAS Record Update process or CAS Details page to set the Upload Status to *Upload Exclude* for records that should be excluded from the Upload extract. For example, for a second CAS record for an applicant where the previous CAS record has already been sent and a CAS number requested.
5. Use the CAS Record Update process or CAS Details page to set the Upload Status to *Upload Pending* for records where all the details have been entered and the record needs to be verified before it is included in an Upload extract.
6. Use the CAS Record Update process or CAS Details page to change the Upload Status from *Upload Pending* to *Upload Ready* for records that have been verified and are ready to be included in an Upload extract.
7. Run the Create Extract Data process with the Create Upload option selected. The process picks up only those records that have an Upload Status of *Upload Ready*.
8. After including the record data in the extract, the Create Extract Data process sets the Upload Status to *Upload Complete* and saves the Upload File ID to each CAS record included.
9. After importing the CAS number, when you update the fees paid details on the CAS Details page, the system automatically sets the Update Status to *Update Required*.
10. Use the CAS Record Update process or CAS Details page to set the Update Status to *Update Pending* for records where the fees paid changes need to be verified before the record is included in an Update extract.
11. Use the CAS Record Update process or CAS Details page to change the Update Status from *Update Pending* to *Update Ready* for records that have been verified and are ready to be included in an Update extract.

12. Run the Create Extract Data process with the Create Update option selected. The process picks up records that have an Update Status of *Update Ready*.
13. After including the record data in the extract, the Create Extract Data process sets the update status to *Update Complete*.
14. Use the CAS Record Update process or CAS Details page to set the Report Status to *Report Ready* for the CAS records where the CAS number has been used and the applicant or student has not enrolled at your institution.
15. Run the Create Extract Data process with the Create Report option selected. The process picks up only those records that have a Report Status of *Report Ready*.
16. After including the record data in the extract, the Create Extract Data process sets the status to *Report Complete*.

Applying Academic Organization Security to the Create Extract Process

These are the high-level steps to set up academic organization security for the Create Extract process:

1. Select the Apply Academic Org Security on the Statuses page.
2. Use the Academic Org Security page to grant or restrict access to academic organizations (Set Up SACR, Security, Secure Student Administration, User ID, Academic Org Security, Academic Org Security). Only those academic organizations defined using the Tree Manager are available for selection on the Academic Org Security page.

See "Defining Academic Organizations" (Campus Solutions Application Fundamentals)

See "Securing Academic Organizations" (Campus Solutions Application Fundamentals)

3. Use the Taxonomy/Campus page to link academic programs to academic organizations (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Taxonomy/Campus).

If you are not linking programs, link plans as described in the next step.

4. Use the Owner page to link academic plans to academic organizations (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Owner).

If you are not linking plans, link programs as described in the previous step.

The Create Extract process performs the following steps if you select the Applying Academic Organization Security check box on the Statuses page:

Step 1: Select the program and plan for the CAS record

For a CAS record with type = *applicant*:

- Select the academic program from the latest effective dated Campus Solutions admission application record (the CAS Details page displays this record).
- Select the reported plan from the CAS Details record or if the reported plan does not exist, then select the plan that starts with the lowest alphabet from the latest effective dated Campus Solutions admission application record. For example, suppose if the reported plan does not exist and there are two plans: Biology and Zoology. Then, select Biology.

For a CAS record with type = *student*:

- Select the academic program from the latest effective dated Campus Solutions student program record (the CAS Details page displays this record).
- Select the reported plan from the CAS Details record or if the reported plan does not exist, then select the plan that starts with the lowest alphabet from the latest effective dated Campus Solutions student program record.

Step 2: Use the Taxonomy/Campus and Owner pages to find out the academic organizations that are linked with the selected academic program and academic plan.

Step 3: Use the Academic Org Security page to find out whether the user ID that you are using to run the Create Extract process has access to the academic organizations.

Step 4: If the user ID has access to the academic organization, include the CAS record in the extract.

Entering the PBI Data for an Academic Program

Access the Academic Program PBI Data page (**Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > PBI Data**).

This example illustrates the fields and controls on the Academic Program PBI Data page. You can find definitions for the fields and controls later on this page.

*Admit Term	Cohort Tag	Course Fees	Boarding Fees	Start Date	Latest Acceptance	Expected Enrollment	Expected End
1 2160		16000.00	1600.00	09/01/2016	09/30/2016	09/08/2016	06/30/2019
2 2150		15000.00	1500.00	09/01/2015	09/30/2016	09/08/2015	06/30/2018

This page appears only if you have selected the PBI check box on the Academic Institution 6 or SA Features page. The values defined are used to populate the corresponding fields in new CAS records if no value is defined for the field at plan level. Values are also used during field derivation.

Field or Control	Description
Cohort Tag	<p>(Optional) Select the appropriate cohort tag as set up for your institution.</p> <p>Use this field to allow different dates and fees to be defined for different cohorts within the same Admit Term. The value you set in this field is used by the CAS Details component as well as the processes that are used to add new CAS records to evaluate the default dates and fees for an applicant or student.</p>

The Placement Percentage, Placement Justification, and Placement Organisation fields become available for entry if you select *Yes* in the Work Placement field. The Reason SELT Not Required field becomes available for entry if you select *No* in the SELT Required field.

Refer to the PBI Field Derivation documentation for information about derivation of the individual fields.

Entering the PBI Data for an Academic Plan

Access the Academic Plan PBI Data page (**Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > PBI Data**).

This example illustrates the fields and controls on the Academic Plan PBI Data page.

*Admit Term	Cohort Tag	Course Fees	Boarding Fees	Start Date	Latest Acceptance	Expected Enrollment	Expected End
1 2150		15100.00	1510.00	09/02/2015	09/29/2015	09/09/2015	06/29/2018
2 2160		16100.00	1610.00	09/02/2016	09/29/2016	09/09/2016	06/29/2019

This page appears only if you have selected the PBI check box on the Academic Institution 6 or SA Features page. The values defined are used to populate the corresponding fields in new CAS records. Values are also used during field derivation.

Field or Control	Description
Cohort Tag	<p>(Optional) Select the appropriate cohort tag as set up for your institution.</p> <p>Use this field to allow different dates and fees to be defined for different cohorts within the same Admit Term. The value you set in this field is used by the CAS Details component as well as the processes that are used to add new CAS records to evaluate the default dates and fees for an applicant or student.</p>

Refer to the PBI Field Derivation documentation for information about derivation of the individual fields.

Setting Up PBI Communications

You must set up Campus Community communications to notify applicants and students about their assigned CAS numbers or fee update details. This section discusses the steps required to define the Event ID values that are used in the PBI Configuration page, the Import CAS Details process (for CAS Number notification), the Create Extract - update process (for Fee Update notification), the 3C Engine process and the Communications Generation process to create communications to notify applicants and students.

For more information on setting up communications, see:

- "Understanding Communication Management" (Campus Community Fundamentals)
- "Understanding the 3C Engine" (Campus Community Fundamentals)

This section provides communications setup examples for sending CAS number notifications to applicants and students. Similar setups are required for Fee Update notification. The Fee Update notification should contain the relevant update data: First Year Course Fees, Course Fees Paid, Accommodation Fees Paid, and Boarding Fees Paid.

The PeopleSoft system provides a CASN administrative function that captures the variable data required to identify the CAS record that has been updated. The variable data can be used to generate communications, checklists or comments associated with an Event ID. No further setup is required for this function.

The following variable data is automatically populated from the incoming CAS record:

- Academic Career
- Student Career Number
- CAS Number

This example shows the CASN administrative function.

Administrative Function Table

Administrative Function: CASN

Description Find | View All First 1 of 1 Last

'Effective Date: 01/01/1900 31 'Status: Active Variable Data + -

'Description: CAS Notification

Short Description: CAS Notf

☒ Admin Function - People ☐ Admin Function - Organizations

To access the Administrative Function table, select **Set Up SACR >Common Definitions >Administrative Function Table**.

Creating Queries

Access the Query Manager page (**Reporting Tools >Query >Query Manager**).

The PeopleSoft system delivers example queries, one for CAS Number notifications to applicants (QA_SAD_PB_CASA) and one for CAS Number notifications to continuing students (QA_SAD_PB_CASB).

Create your own queries to select all the data you require for your communications. Refer to "Defining Communication Data Sources" in this section for information about data sources.

Each query requires the following:

- The core record must be included in the query associated with the administrative function. For the CASN function, the CAS Details record (SAD_PB_CAS) must be included.
- A prompt must be created for the applicant/student ID. The Unique Prompt Name must be changed to *Person_ID*.
- Prompts must also be created for the variable data fields relating to the administrative function, ACAD_CAREER, STDNT_CAR_NBR and SAD_PB_CAS_NUMBER.

This example shows the selected fields for the QA_SAD_PB_CASA query.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
---------	-------	-------------	---------	---------------	----------	--------	----------	-----

Query Name: QA_SAD_PB_CASA **Description:** CAS Applicant Feed ▾

View field properties, or use field as criteria in query statement. Reorder / Sort

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - ID	Char11				ID		Edit	
2	A.INSTITUTION - Academic Institution	Char5				Institution		Edit	
3	A.SAD_PB_REC_TYPE - Record Type	Char1		N		Type		Edit	
4	A.ACAD_CAREER - Academic Career	Char4				Career		Edit	
5	A.STDNT_CAR_NBR - Student Career Nbr	Num3.0				Career Nbr		Edit	
6	A.ADM_APPL_NBR - Application Nbr	Char8				Appl Nbr		Edit	
7	A.APPL_PROG_NBR - Application Program Nbr	Num3.0				Prog Nbr		Edit	
8	A.EFFDT - Effective Date	Date				Eff Date		Edit	
9	A.EFFSEQ - Effective Sequence	Num3.0				Sequence		Edit	
10	A.SAD_PB_CAS_NUMBER - CAS Number	Char14				CAS Number		Edit	

This example shows the selected records for the QA_SAD_PB_CASA query.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
---------	--------------	-------------	---------	--------	----------	--------	----------	-----

Query Name: QA_SAD_PB_CASA **Description:** CAS Applicant Feed ▾

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record	
	A SAD_PB_CAS - CAS Details	Hierarchy Join
	B ADM_APPL_PROG - Admission Applicant Program	Hierarchy Join

Expand All Records Collapse All Records

This example shows the selected fields for the QA_SAD_PB_CASB query.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
---------	-------	-------------	---------	---------------	----------	--------	----------	-----

Query Name: QA_SAD_PB_CASB **Description:** CAS Student Feed ▾

View field properties, or use field as criteria in query statement. Reorder / Sort

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - ID	Char11				ID		Edit	
2	A.INSTITUTION - Academic Institution	Char5				Institution		Edit	
3	A.SAD_PB_REC_TYPE - Record Type	Char1		N		Type		Edit	
4	A.ACAD_CAREER - Academic Career	Char4				Career		Edit	
5	A.STDNT_CAR_NBR - Student Career Nbr	Num3.0				Career Nbr		Edit	
6	A.EFFDT - Effective Date	Date				Eff Date		Edit	
7	A.EFFSEQ - Effective Sequence	Num3.0				Sequence		Edit	
8	A.SAD_PB_CAS_NUMBER - CAS Number	Char14				CAS Number		Edit	
9	A.SAD_PB_REC_NUMBER - Record Number	Num3.0				Record Number		Edit	

This example shows the selected records for the QA_SAD_PB_CASB query.

Records **Query** Expressions Prompts Fields Criteria Having View SQL Run

Query Name: QA_SAD_PB_CASB **Description:** CAS Student Feed ▾

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record	
A	SAD_PB_CAS - CAS Details	Hierarchy Join
B	ACAD_PROG - Student Academic Program	Hierarchy Join

Expand All Records **Collapse All Records**

Defining Communication Data Sources

Access the Communication Data Source page (**Campus Community >Communications >Set up Communications >Communication Data Source**).

Define Communication Data Sources for each query.

This example shows the CASA data source map ID.

Communication Data Source

*Data Source Map ID:

Description:

Object Owner ID:

Data Source Type: XMLDoc Object ☒ Active

Data Source Context

*Administrative Function: CAS Notification ☒ Person ☐ Organization

Generic Process Data Find First 1-9 of 9 Last

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	<input type="checkbox"/>
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	<input type="checkbox"/>
6	Name for individual address	PER_NAME_ADDR	<input type="checkbox"/>
7	Name for extra use	PER_NAME_EXTRA	<input type="checkbox"/>
8	Name for individual salutation	PER_NAME_SAL	<input type="checkbox"/>
9	Name for joint salutation	PER_NAME_SALJNT	<input type="checkbox"/>

Custom Extract Data Find First 1 of 1 Last

Sequence	*Type	Query Name	Max Nbr	Application Class
1	Query	QA_SAD_PB_CASA	<input type="text" value=""/>	<input type="button" value="+"/> <input type="button" value="-"/>

Registered Date/Time: 25/03/10 13:22:03 Registered By: PS

Last Update Date/Time: 30/03/10 07:24:19 Last Update User ID: PS

[View/Download Sample Data File](#)

This example shows the CASB data source map ID.

Communication Data Source

*Data Source Map ID:

Description:

Object Owner ID:

Data Source Type: XMLDoc Object ☒ Active

Data Source Context

*Administrative Function: CAS Notification ☒ Person ☐ Organization

Generic Process Data

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	<input type="checkbox"/>
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	<input type="checkbox"/>
6	Name for individual address	PER_NAME_ADDR	<input type="checkbox"/>
7	Name for extra use	PER_NAME_EXTRA	<input type="checkbox"/>
8	Name for individual salutation	PER_NAME_SAL	<input type="checkbox"/>
9	Name for joint salutation	PER_NAME_SALJNT	<input type="checkbox"/>

Custom Extract Data

Sequence	*Type	Query Name	Max Nbr	Application Class
1	Query	QA_SAD_PB_CASB		

Registered Date/Time: 25/03/10 13:23:18 Registered By: PS

Last Update Date/Time: 25/03/10 13:23:18 Last Update User ID: PS

[View/Download Sample Data File](#)

Defining Report Definitions

Access the Definition page (**Reporting Tools >BI Publisher >Report Definition**).

Example templates are delivered that can be used in Report Definitions for CAS Number notifications to applicants (CASA_1) and CAS Number notifications to students (CASB_1). The templates have been created from the XML file downloaded from each Data Source using Oracle BI Publisher.

Create your own template files. There are several possible methods including installing BI Publisher for Word which creates a new menu option in Word. A template can then be created from the XML document downloaded from the Data Source page.

This example shows the Definition page for CASA.

Definition	Template	Output	Properties	Security	Bursting
Report Name: CASA					
Data Source					
Data Source Type: XMLDoc Object					
Data Source ID: CASA					
Data Source Description: CAS Applicant					
Report Properties					
Report Description: CAS Applicant					
*Report Status: Active					
*Report Category ID: ALLUSER All PeopleSoft User					
Object Owner ID: PeopleTools					
*Template Type: RTF					
Retention Days:					
Registered Date/Time: 25/03/2010 13:26:42 Registered By: PS					
Updated Date/Time: 25/03/2010 13:26:42 Updated By: PS					
Download: Data Schema Sample Data					

This example shows the Template page for CASA.

Definition	Template	Output	Properties	Security	Bursting
Report Name: CASA					
Template Find View All First 1 of 1 Last					
Template ID: CASA_1 <input checked="" type="checkbox"/> Default Template					
Description:					
*Language Code: English Channel: Email					
Template Files Find View All First 1 of 1 Last					
Effective Date: 30/03/2010					
*Status: Active					
Template File: CASA_1.rtf Upload Preview <input type="checkbox"/> Use Alt. XML					

This example shows the Definition page for CASB.

Definition	Template	Output	Properties	Security	Bursting
Report Name: CASB					
Data Source					
Data Source Type:		XMLDoc Object			
Data Source ID:		CASB			
Data Source Description:		CAS Student			
Report Properties					
Report Description:		CAS Student			
*Report Status:		Active			
*Report Category ID:		ALLUSER All PeopleSoft User			
Object Owner ID:		Admissions - UK			
*Template Type:		RTF			
Retention Days:					
Registered Date/Time:		25/03/2010 13:27:46		Registered By: PS	
Updated Date/Time:		25/03/2010 13:27:46		Updated By: PS	
Download:		Data Schema		Sample Data	

This example shows the Template page for CASB.

Definition	Template	Output	Properties	Security	Bursting
Report Name: CASB					
Template Find View All First 1 of 1 Last					
Template ID:		CASB_1		<input checked="" type="checkbox"/> Default Template	
Description:					
*Language Code:		English		Channel: Email	
Template Files Find View All First 1 of 1 Last					
Effective Date:		25/03/2010			
*Status:		Active			
Template File:		CASB.rtf		<input type="button" value="Upload"/> <input type="button" value="Preview"/> <input type="checkbox"/> Use Alt. XML	

Defining Standard Letters

Access the Standard Letters page (**Campus Community >Communications >Set up Communications >Standard Letter Table**).

Create standard letters for applicants and students. Select Report Name to add the details.

This example shows the Standard Letters page for CSA.

Standard Letters

Letter Code: CSA

*Description: CAS Applicant Short Description: CAS Applic

Set Letter Code:

Processing Letter Details

*Function: CAS Notification

Applicable to: ☒ Persons ☐ Organization

*Letter Type: Softcopy

*Letter Printed Data: All SQC Name:

☒ Joint Communications Allowed

☐ Include Enclosures

☒ Define Comm Gen Parameters

Template Selection

Find | View All First 1 of 1 Last

Report Name: CASA CAS Applicant [View Report Definition](#)

Data Source ID: CASA

Template List

Customize | Find | | First 1 of 1 Last

Template ID	Description	Language	Method	Default Template
CASA_1		English	E-Mail	<input checked="" type="checkbox"/>

This example shows the Standard Letters page for CSB.

Standard Letters

Letter Code: CSB

*Description: CAS Student Short Description: CAS Studen

Set Letter Code:

Processing Letter Details

*Function: CAS Notification

Applicable to: ☒ Persons ☐ Organization

*Letter Type: Softcopy

*Letter Printed Data: All SQC Name:

☒ Joint Communications Allowed

☐ Include Enclosures

☒ Define Comm Gen Parameters

Template Selection

Find | View All First 1 of 1 Last

Report Name: CASB CAS Student [View Report Definition](#)

Data Source ID: CASB

Template ID	Description	Language	Method	Default Template
CASB_1		English	E-Mail	<input checked="" type="checkbox"/>

Defining Communication Contexts

Access the Communications Context page (**Campus Community >Communications >Set up Communications >Communications Context Table**).

Create communication contexts for applicants and students.

This example shows Communications Context page for CASA.

Communication Context

Academic Institution: PSUNV PeopleSoft University

Communication Context: CASA

Communication Context Description Find | View All First 1 of 1 Last

*Effective Date: 25/03/2010 *Status: Active

*Description: CAS Applicant

Short Desc: CAS Applic

*Method	*Direction	Letter Code	Description
E-Mail	Outgoing Communication	CSA	CAS Applicant

Add

This example shows Communications Context page for CASB.

Communication Context

Academic Institution: PSUNV PeopleSoft University

Communication Context: CASB

Communication Context Description Find | View All First 1 of 1 Last

*Effective Date: 25/03/2010 *Status: Active

*Description: CAS Student

Short Desc: CAS Studen

*Method	*Direction	Letter Code	Description
E-Mail	Outgoing Communication	CSB	CAS Student

Add

Defining Communication Categories

Access the Communications Category page (**Campus Community >Communications >Set up Communications >Communications Category Table**).

Create communication categories for applicants and students using the CASN administrative function and the communication contexts created in the previous step.

This example shows the Communications Categories page for CASA.

Communication Categories

Academic Institution: PSUNV PeopleSoft University
 Communication Category: CASA

Communication Category Description Find | View All First 1 of 1 Last

*Effective Date: 25/03/2010 *Status: Active

*Description: CAS Applicant

Short Description: CAS Applic

*Function: CASN CAS Notification

Communication Context

*Context	Description
CASA	CAS Applicant

Add

This example shows the Communications Categories page for CASB.

Communication Categories

Academic Institution: PSUNV PeopleSoft University
 Communication Category: CASB

Communication Category Description Find | View All First 1 of 1 Last

*Effective Date: 25/03/2010 *Status: Active

*Description: CAS Student

Short Description: CAS Studen

*Function: CASN CAS Notification

Communication Context

*Context	Description
CASB	CAS Student

Add

Defining Communication Speed Keys

Access the Speed Key Table page (**Campus Community >Communications >Set up Communications >Speed Key Table**).

Create speed keys for applicants and students using the CASN administrative function and the communication contexts and categories created in the previous steps.

This example shows the Communications Speed Keys page for CASA and CASB.

Communication Speed Keys

Institution: PSUNV PeopleSoft University
Function: CASN CAS Notification

Comm Key Detail

Find | View 1 First 1-2 of 2 Last

*Comm Key: CASA

☒ Print Comment

☐ Activity Completed

☐ Unsuccessful Outcome

*Description: CAS Applicant

Short Desc: CAS Applic

*Category: CASA CAS Applicant

*Context: CASA CAS Applicant

Duration:

*Method: E E-Mail

Direction: OUT

Letter Code: CSA

Comments: Comment for CASA applicant

*Comm Key: CASB

☒ Print Comment

☐ Activity Completed

☐ Unsuccessful Outcome

*Description: CAS Student

Short Desc: CAS Studen

*Category: CASB CAS Student

*Context: CASB CAS Student

Duration:

*Method: E E-Mail

Direction: OUT

Letter Code: CSB

Comments: Comment for CAS student

Defining Communication 3C Groups

Access the Communication 3C Groups page (**Campus Community >Communications >Set up Communications >Communication 3C Groups**).

Define the new categories for the appropriate Communication 3C Groups for the user depending on your institution's group setup (Set Up SACR, User Defaults, User 3C Group Summary).

This example shows the Communication 3C Groups page for CASA.

Communication 3C Groups

Institution: PSUNV PeopleSoft University
Category: CASA CAS Applicant
Function: CAS Notification

Update/Inquiry Group		
*Group	Description	
GRAD	Graduate Admissions	-
UGAD	Undergraduate Admissions	-

This example shows the Communication 3C Groups page for CASB.

Communication 3C Groups

Institution: PSUNV PeopleSoft University
Category: CASB CAS Student
Function: CAS Notification

Update/Inquiry Group		
*Group	Description	
SREC	Student Records	-

Creating Event Definitions

Access the Event Definition page (**Campus Community > 3C Engine > Set Up 3C Engine > Event Definition**).

Define events using the CASN administrative function and communication keys defined in previous steps. Additional communications, comments or checklists can be added to the events if required.

This example shows the Event Definition page for CASA.

Event Definition

Academic Institution: PeopleSoft University

Event ID: CASA

Event Detail

Find | View All First 1 of 1 Last

*Effective Date:

25/03/2010

*Status:

Active

*Description:

CAS Applicant

*Short Description:

CAS Appl

*Function:

CASN

CAS Notification

☐ User Selection

[Variable Data Joint Rules](#)

Communications

*Comm Key:

CASA

CAS Applicant

[Detail](#)

Comments

*Comment Category:

Detail

Checklists

*Checklist Code:

Detail

☐ Update Status

This example shows the Event Definition page for CASB.

Event Definition

Academic Institution: PeopleSoft University

Event ID: CASB

Event Detail

Find | View All First 1 of 1 Last

*Effective Date:

25/03/2010

*Status:

Active

*Description:

CAS Student

*Short Description:

CAS Studen

*Function:

CASN

CAS Notification

☐ User Selection

[Variable Data Joint Rules](#)

Communications

*Comm Key:

CASB

CAS Student

[Detail](#)

Comments

*Comment Category:

Detail

Checklists

*Checklist Code:

Detail

☐ Update Status

Defining Event 3C Groups

Access the Event 3C Groups page (**Campus Community >3C Engine >Set Up 3C Engine >Event 3C Groups**).

Define the new event IDs for the appropriate Communication 3C Groups for the user depending on your institutions group setup (Set Up SACR, User Defaults, User 3C Group Summary).

This example shows the Event 3C Groups page for CASA.

Event 3C Groups

Academic Institution: PSUNV PeopleSoft University

Event ID: CASA CAS Applicant

Function: CAS Notification

Update/Inquiry Group			
*Group	Description		
GRAD	Graduate Admissions	+	-
UGAD	Undergraduate Admissions	+	-

This example shows the Event 3C Groups page for CASB.

Event 3C Groups

Academic Institution: PSUNV PeopleSoft University

Event ID: CASB CAS Student

Function: CAS Notification

Update/Inquiry Group			
*Group	Description		
BREC	Student Records	+	-

Related Links

[Generating PBI Communications](#)

"Understanding Communications Setup" (Campus Community Fundamentals)

Configuring Common Attributes for PBI

Common Attribute Framework is enabled for the CAS Details page (SAD_PB_CAS) with a delivered record context. You can use this framework to add an additional fields link and secondary page to the CAS Details page. For more information on the CAS Details page, see the next section:

Creating and Maintaining CAS Details

For information on using Common Attribute Framework, refer to the Campus Community — Common Attribute Framework documentation.

See "Understanding Common Attribute Framework" (Campus Community Fundamentals)

This example shows the delivered record context for SAD_PB_CAS.

Record Context

Secondary Page Options

Record (Table) Name: SAD_PB_CAS

Delete Record Context

*Description: CAS Details

☒ System Data

*Attribute Record: SAD_PB_CAS_CAF

CAS Details CAF Record

Override Prompt Table:

☐ Extend to staging record

Entity Name:

Attribute Filter Class:

Attribute Display Type

☐ Inline Subpage
☒ Secondary Page

Copy Attributes from

Copy

Attributes

Find | View All

First 1 of 1 Last

*Attribute Sequence: 1

Status: Active

*Common Attribute:

☐ Required

Entity Associations

Find | View All

First 1 of 1 Last

	*Entity Name		
1			

This example shows the delivered record context for SAD_PB_CAS.

Record Context

Secondary Page Options

Record (Table) Name: SAD_PB_CAS
Override Secondary Page:

Link Label

Message Set Number: 14260 Message Number: 97 Message Text: Additional Fields

Header Fields ?

Personalize | Find | First 1-3 of 3 Last

	*Field Name	Use Short Label	*Field Long Name	*Field Short Name	Record Name 1	Field Name	Show Only Description		
1	INSTITUTION	<input checked="" type="checkbox"/>		Institution	INSTITUTION_TBL	DESCR	<input checked="" type="checkbox"/>		+ -
2	EMPLID	<input checked="" type="checkbox"/>		ID					+ -
3	SAD_PB_REC_NUMBE	<input type="checkbox"/>	Record Number						+ -

When you add a minimum of one attribute to this record context, the Additional Details link will appear on the CAS Details page. Click that link to capture additional data. If no attribute is added to this record context, the CAS Details page will not display the link.

Creating and Maintaining CAS Details

You can use the CAS Maintenance component to create and update CAS records.

The CAS Maintenance component has a CAS Details page and a Report Details page. Use the pages to enter upload, update and report extract field values at the application or student career level.

This section discusses how to:

- Create new CAS records for individuals
- Create new CAS records for groups of students
- Review existing CAS records.
- Enter or update PBI upload/update data.
- Enter or update PBI report data.

Pages Used to Create and Maintain CAS Details

Page Name	Definition Name	Navigation	Usage
CAS Details	SAD_PB_CAS	<ul style="list-style-type: none"> • Student Admissions > PBI Processing > CAS Maintenance > CAS Details • Student Admissions > Application Entry > CAS Maintenance • Student Admissions > Application Maintenance > Maintain Applications > Application Program Data > CAS Details • Records and Enrollments > Career and Program Information > Student Program/Plan > Student Program > CAS Details 	Enter or update upload and update field values for a CAS Details record at the application or student program level
Create CAS Records	SAD_PB_CAS_CRT	Recruiting and Admissions >PBI Processing >Create CAS Records	Create CAS Details records using Population Selection.

Page Name	Definition Name	Navigation	Usage
Report Details	SAD_PB_CASREPDTLS	<ul style="list-style-type: none"> • Student Admissions > PBI Processing > CAS Maintenance > Report Details • Student Admissions > Application Entry > CAS Maintenance • Student Admissions > Application Maintenance > Maintain Applications > Application Program Data > CAS Details > Report Details • Records and Enrollments > Career and Program Information > Student Program/Plan > Student Program > CAS Details > Report Details 	Enter or update report field values for a CAS Details record at the application or student career level.

Creating New CAS Records for Individuals

You can use the CAS Maintenance component to add new CAS Details records.

Applicants

New CAS records can be added for applicants that require a student visa using the CAS Maintenance component. You can access this component from the Applicant Entry or PBI Processing menus or by clicking the CAS Details link on the Application Program Data page in the Maintain Applications component. Select a record type of Applicant to add a new record.

Continuing Students

New CAS records can be added for continuing students that require an extension to an existing visa. To add new CAS records for continuing students use the CAS Maintenance component from the menus or click the CAS Details link on the Student Program page. Select a record type of Student to add a new record.

Adding CAS Records

Add a CAS record for each CAS request. You can add multiple CAS records for an application or student program record. In such a case, the system defaults the record number to 1 for the first CAS record and increments the record number as you add new records for the application or student program record.

Note that the Import CAS Details and the Import Applicant Data processes can also create new CAS records.

See [Importing CAS Details](#)

See [Setting Up UCAS and Teacher Training Options](#)

Creating New CAS Records for Groups of Students

Access the Create CAS Records page (**Recruiting and Admissions >PBI Processing >Create CAS Records**).

Field or Control	Description
Academic Institution	Select the institution. Only records that have a matching value from Population Selection are created.
Record Type	Select a value to create CAS records for either an applicant or student.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. 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 act the same from within the group box no matter what run control page you are on or what transaction you are processing.

See "Using the Population Selection Process" (Campus Community Fundamentals).

Field or Control	Description
Query Name	<p>These sample queries are provided:</p> <ul style="list-style-type: none"> • SAD_PB_CAS_CREATE_APPLICANT: This query picks up admitted applications for a particular term where the Official Residency record is "Overseas" (OVS). The admit term of the application is matched to the effective term of the Residency record. The Admit Term is selected using Edit Prompts. • SAD_PB_CAS_CREATE_STUDENT: This query picks up active student program records where the student has a T4S (tier 4 student) visa record with an expiration date prior to the end date of the Expected Graduation Term.

If you create your own queries, make sure you include the following fields for:

- Record Type of Applicant: EMPLID, INSTITUTION, ACAD_CAREER, ADM_APPL_NBR, and APPL_PROG_NBR
- Record Type of Student: EMPLID, INSTITUTION, ACAD_CAREER and STDNT_CAR_NBR

Parameters

<i>Field or Control</i>	<i>Description</i>
Effective Date	(Optional) Enter the date to be used for creating new records. The date you enter replaces the current date.
Upload Status	By default, this value is set to <i>New</i> .
Course Start Date, Latest Acceptance Date, Expected End Date, First Year Course Fees, First Year Boarding Fees	(Optional) If you do not enter values, the values default in the same way as new records that are added via the CAS Details page.

Reviewing Existing CAS records

You can use the CAS Maintenance component to search for existing CAS Details records.

Search for existing records by entering criteria on the search page. The search values for Academic Institution, Academic Career and Admit Term are defaulted from the values defined on the User Defaults pages.

Records with a particular Upload, Update or Report Status can be selected by adding a value in the Processing Status field. For example, select Update Complete in the Processing Status field of the search page to search for records that the Create Extract process has included in an Update extract.

Note: To allow records to be searched for using the Processing Status field it is recommended that distinct status values are defined for Upload, Update and Extract. Refer to "Setting up CAS Statuses" for more information.

See [Setting up CAS Statuses](#)

For users to have access to CAS records for applications of particular application centers using the Application Entry menu, you must grant the users access to these application centers via the Application Center Security page.

See "Setting Security for Application Centers" (Campus Solutions Application Fundamentals)

Security is not applied when the record type is *student* or when records are accessed using the PBI Processing menu.

Entering PBI Data for Applicants or Students

Access the CAS Details page (**Student Admissions >PBI Processing >CAS Maintenance >CAS Details**).

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

The screenshot shows the 'CAS Details' page with two tabs: 'CAS Details' (active) and 'Report Details'. The page is divided into several sections:

- Personal Information:** First Name: Julie, Middle Name: Anne, Last Name: Defoe, ID: 0382. Links: [Maintain Applications](#), [Personal Information](#), [View Long Name](#).
- Academic Details:** Academic Institution: PeopleSoft University UK, Academic Career: Undergraduate, Record Type: Applicant, Student Career Nbr: 0, Residency: Home/United Kingdom, Program Number: 0, Academic Program: Bachelor of Science, Campus: Main Campus, Admit Term: 2014-2015 Academic Year, Academic Load: Full-Time.
- CAS Status:** Effective Date: 08/17/2016, Upload Status: Upload Complete, CAS Number: [blank], CAS Status: [blank], Update Status: [blank], User ID: UK, Barret,James. Links: [Find](#), [View All](#), [First](#), [1 of 1](#), [Last](#).
- Effective Sequence:** 1, Upload File ID: PSGBR_UPLOAD_2016_08_17_09, Export File ID: [blank], CAS Status Date: [blank], Update File ID: [blank].
- Navigation Bar:** Applicant Details, Course Details, Financial Details, Documentation, Sponsor Notes.

You can use the CAS Details page to view a CAS record's history of changes throughout its processing cycle. Each history change record has a unique Effective Date and Sequence Number combination.

Field or Control	Description
First Name, Middle Name, and Last Name	Displays the values from the most recent effective-dated primary name record for the person.
Personal Information	Click to navigate to the Biographical Details page of the Add/Update a Person component.
View Long Name	Click to access the Manage Long Name page. This link appears only when there is a long names record associated with the primary name record
Upload Status	Identifies whether the record has been identified as: <ul style="list-style-type: none"> Newly added (New or blank) To be included in the Upload extract (Upload Ready) Included in the Upload extract (Upload Complete) Once the CAS Number and Status have been imported the system makes this field non-editable.
Upload File ID	Displays the File ID generated when the record is included in the Upload extract.

Field or Control	Description
CAS Number, Export File ID, CAS Status, andCAS Status Date	<p>Displays the values imported using the Import CAS Details process.</p> <p>The CAS Number field is used to derive the corresponding field in the Update and Report extracts.</p>
Update Status	<p>Identifies whether the record has been identified as:</p> <ul style="list-style-type: none"> • Requiring inclusion in the Update extract (Update Required) • To be included in the Update extract (Update Ready) • Included in the Update extract (Update Complete) <p>The system enables this field once the CAS Number and Status has been imported and the CAS Status is Assigned. Once the CAS Status is updated to one of the post-assigned values, for example, <i>Used</i>, the field becomes non-editable.</p> <p>Once the CAS Status is Assigned, the system will automatically update the Update Status to Update Required when changes are made to the Course Fees Paid, Accommodation Fees Paid or Boarding Fees paid values.</p>
Update File ID	<p>Displays the File ID generated when the record is included in the Update extract. If the record is included in multiple Update extracts the most recent Update File ID is displayed in the current effective date/sequence record.</p>
User ID	<p>Indicates the User ID and name of the user who last updated the record.</p> <p>If the Create Extract Data or Import CAS Details process updated the record, the User ID field indicates the user who ran the process.</p>

Applicant Details

The following is an example of the Applicant Details region on the CAS Details page.

This example illustrates the fields and controls on the Applicant Details region – CAS Details page. You can find definitions for the fields and controls later on this page.

Applicant Details

Date of Birth: 18/11/1982
☐ Report Year/Month Only
☐ Report Year Only

Gender: Male
UCAS Personal ID: [0053278822](#)

Birth Country: United Kingdom
Birth Location:

Nationality: United Kingdom

Passport Number: 12340053278822

Partner Institution:

Overseas Institution:

SELT Required: No
Reason SELT Not Required: English speaking country

English Level Attained:
Test Provider:

English Reading Level:
English Speaking Level:

English Listening Level:
English Writing Level:

Field or Control	Description
Report Month/Year Only	Select to include the date of birth in CCYY-MM format in the Upload extract
Report Year Only	Select to include the date of birth in CCYY format in the Upload extract.
UCAS Personal ID	<p>Displays the value imported from UCAS.</p> <p>The system selects this value from External System ID records with ID type UC or UP. The most recent effective dated record is displayed. The same value is derived for the corresponding field in the Upload extract when the record type is Applicant.</p> <p>Click the link to navigate to the UCAS Applicant Summary page.</p> <hr/> <p>Note: The UTT Personal ID is not included in the CAS Details page. Therefore, the UCAS Personal ID link is not functional for UTT applicants. To access a UTT application, select the Maintain Applications link on the header region of the CAS Details page, and then select the Personal ID link on the Application Program Data page.</p> <hr/>
Nationality	Displays the country value of the non-EU Citizenship record for the applicant or student.

Field or Control	Description
Select Nationality	<p>Click if you want to change the default value or select a new value for the Nationality field.</p> <p>If multiple non-EU Citizenship records exist on the Campus Community Citizenship/Passport page, then the record with the lowest country code is displayed by default in the Nationality field and the link is displayed to allow an alternative record to be selected.</p>
Passport Number	Displays the passport number of the record associated with the Citizenship record displayed in the Nationality field.
Select Passport	<p>Click if you want to change the default value or select a new value for the Passport field.</p> <p>If multiple Passport records exist on the Campus Community Citizenship/Passport page for the selected Nationality , then the passport record with the most recent Issue Date is displayed by default in the Passport Number field and the link is displayed to allow an alternative record to be selected. Passport records with an Expiration Date in the past are not considered.</p>
Partner Institution and Overseas Institution	<p>The system automatically populates this field when a new CAS record is created. The value is populated from the Academic Plan PBI data page if a value is defined for the Academic Plan of the application or student career. If a value is not defined for the Academic Plan, the value is populated from the Academic Program PBI data page if a value is defined for the Academic Program of the application or student career.</p> <p>Enter an external ID value if the value has not been set up on the Academic Program or Plan PBI data pages or if you want to enter a different value for the applicant or student.</p> <p>The Overseas Institution prompt is restricted to organizations where the primary location has a country other than GBR.</p>
SELT Required	The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page, or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.

Field or Control	Description
Reason SELT Not Required	<p>This field becomes available when the value is <i>No</i> in the SELT Required field.</p> <p>The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page. If default value does not exist at these two levels, then the system sets the field as blank.</p>
English Level Attained, Test Provider, English Reading Level, English Speaking Level, English Listening Level, and English Writing Level	These fields become available when the value is <i>Yes</i> in the SELT Required field.

Note: Fields related to personal details, such as Date of Birth, Gender, Birth Country and Birth Location, display values from the core person record. This is different from the Nationality and Passport Number fields whose values the system stores in the CAS Details record rather than just display the values from the core person record.

Course Details

The following is an example of the Course Details region on the CAS Details page.

This example illustrates the fields and controls on the Course Details region – CAS Details page. You can find definitions for the fields and controls later on this page.

Course Details

Academic Plan: BIOL Biology Reported Plan:

Course Title Override:

Main Site of Study: Hacienda Reported Site:

Academic Level: QCF / NQF Level 6

Secondary Academic Level:

Course Start Date: 01/10/2012

Expected End: 31/07/2015

Latest Acceptance: 30/11/2012

Months Duration:

Full-Time Course: Yes

Course Hours:

Previous UK Study: No

Previous Academic Level:

Current Level Comparison:

Progression Justification:

Work Placement: No

Placement Percentage:

Placement Justification:

Placement Organisation:

Field or Control	Description
Academic Plan	<p>For record type <i>Applicant</i>, if multiple plans exist in the Application Plan Data record, the field displays the plan code which is alphabetically lowest.</p> <p>For record type <i>Student</i>, if multiple plans exist in the Student Program/Plan record, the field displays the plan code which has lowest sequence number</p>
Reported Plan	Select an alternative plan if the required value is different to the default value displayed in the Academic Plan field. This value will be used in place of the Academic Plan in deriving values in the Upload extract.
Course Title Override	Enter the course title that the system uses in the Upload extract. The system uses this value in place of the subplan level values or plan level values in the Upload extract.
Main Site of Study	<p>Displays the value defined for your institution from the PBI Configuration page. If no value is defined in the configuration record the field displays the primary Location of the Campus displayed for the applicant or student.</p> <p>Displays the value defined for your institution from the PBI Configuration page. If no value is defined in the configuration record the field displays the primary Location of the Campus displayed for the applicant or student.</p>
Reported Site	<p>Select an alternative Location if the required value is different to the default value displayed in the Main Site of Study field.</p> <p>This value will be used in place of the Main Site of Study value in deriving the Main Site address fields in the Upload extract.</p>

Field or Control	Description
Academic Level	<p>The system automatically populates this field when a new CAS record is created. The value is populated from HESA Plan Data page if a COURSEAIM value is defined for the Academic Plan of the application or student career.</p> <p>If a value is not defined for the Academic Plan, the value is populated from the HESA Program Data page if a COURSEAIM value is defined for the Academic Program of the application or student career.</p> <p>The first letter of the COURSEAIM value is translated to an NQF level as follows: D (doctoral) = 8, M (masters) = 7, H (honours) = 6, I (intermediate) = 5, C (certificate) = 4.</p> <p>Enter a value if a COURSEAIM value has not been set up on the HESA data pages or if you want to enter a different value for the applicant or student.</p>
Secondary Academic Level	<p>Select a secondary NQF level if required.</p> <p>NQF values for this field and Academic Level are delivered as translate values with the system (SAD_PB_ACAD_LEVEL). You can define additional translate values for qualification types if required.</p>
Course Start Date	<p>The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term and Cohort Tag (if defined) from:</p> <ul style="list-style-type: none"> • Academic Plan PBI Data page • Academic Program PBI Data page • PBI Configuration page • For applicants, the term begin date of the Admit Term on the Application Program Data page; for students, the earliest effective date on the Student Program page. <p>You can override the default value.</p> <p>Course Start Date must be equal to or greater than the current system date when the Upload Status is set to <i>Upload Ready</i>.</p>

Field or Control	Description
Expected End Date	<p>The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term and Cohort Tag (if defined) from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page, (c) PBI Configuration page or (d) the end date of the Expected Graduation Term.</p> <p>You can override the default value.</p>
Latest Acceptance Date	<p>The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term and Cohort Tag (if defined) from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>You can override the default value. The value must be on or after the Course Start Date and on or before the Expected End Date.</p>
Months Duration	<p>The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page. If default value does not exist at these two levels, then the system sets the field as blank.</p> <p>You can override the default value by entering a number in the range of 0 and 99.</p> <p>This field is informational only and is not included in the Upload, Update or Report extract.</p>
Full-Time Course	<p>If the Academic Load field displays Full-Time, the system automatically populates the value Yes when a new CAS record is created.</p>
Course Hours	<p>The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page. If default value does not exist at these two levels, then the system sets the field as blank.</p> <p>You can override the default value by entering a decimal value in the range of 0.0 and 168.0.</p>

Field or Control	Description
Previous UK Study	<p>The system automatically populates this field when a new CAS record is created. The value is populated from the PBI Configuration page. If default value does not exist at the configuration level, then the system sets the field as blank.</p> <p>You can select a different value if required.</p>
Previous Academic Level, Current Level Comparison, and Progression Justification	<p>These three fields become available when the value is <i>Yes</i> in the Previous UK Study field.</p>
Work Placement	<p>The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>You can select a different value if required.</p>
Placement Organization	<p>Enter an external ID value if required.</p> <p>This field becomes available when the value is <i>Yes</i> in the Work Placement field.</p> <p>The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page. If default value does not exist at these two levels, then the system sets the field as blank.</p>
Placement Justification	<p>This field becomes available when the value is <i>Yes</i> in the Work Placement field.</p> <p>The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page. If default value does not exist at these two levels, then the system sets the field as blank.</p>
Placement Percentage	<p>This field becomes available when the value is <i>Yes</i> in the Work Placement field.</p> <p>The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page. If default value does not exist at these two levels, then the system sets the field as blank.</p>

Note: For Placement Percentage, Placement Justification and Placement Organisation: If Work Placement defaults to *No* from the academic plan, then the system skips step (b) for these three fields and values for these fields are not derived from the academic program. In such a case, the value for each of these three fields will either default from (a) academic plan or will be blank to ensure that the default Work Placement details are consistent.

Financial Details

The following is an example of the Financial Details region on the CAS Details page.

This example illustrates the fields and controls on the Financial Details region – CAS Details page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Accommodation Provided	<p>The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>You can select a different value if required.</p>
First Year Course Fees	<p>The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the admit term and Cohort Tag (if defined) from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page.</p> <p>If no value is defined for the admit term, then the field value defaults to zero.</p> <p>You can override the value by entering a number in the range of 0.00 to 1,000,000.</p>

Field or Control	Description
Course Fees Paid	<p>Enter a number in the range of 0.00 to 1,000,000.</p> <p>You cannot enter a value greater than the First Year Course Fees, if the First Year Course Fees field has a value greater than zero.</p> <p>If the CAS Status is <i>Assigned</i> the Update Status value is updated to Update Required when the value for this field is updated.</p> <p>If you leave the field blank, the Create Extract process derives zero for the field in the Upload extract.</p>
Accommodation Fees Included	<p>The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>You can select a different value if required.</p>
Accommodation Fees Paid	<p>Enter a number in the range of 0.00 to 1,000,000.</p> <p>You cannot enter a value greater than the First Year Course Fees, if the First Year Course Fees field has a value greater than zero.</p> <p>If the CAS Status is <i>Assigned</i> the Update Status value is updated to Update Required when the value for this field is updated.</p> <p>If you leave the field blank, the Create Extract process derives zero for the field in the Upload extract.</p>
First Year Boarding Fees	<p>The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the admit term and Cohort Tag (if defined) from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>If no value is defined for the admit term, then the field value defaults to zero.</p> <p>You can override the value by entering a number in the range of 0.00 to 1,000,000.</p>

Field or Control	Description
Boarding Fees Paid	<p>Enter a number in the range of 0.00 to 1,000,000.</p> <p>You cannot enter a value greater than the First Year Boarding Fees, if the First Year Boarding Fees field has a value greater than zero.</p> <p>If the CAS Status is Assigned the Update Status value is updated to Update Required when the value for this field is updated.</p> <p>If you leave the field blank, the Create Extract process derives zero for the field in the Upload extract.</p>

Documentation

The following is an example of the Documentation region on the CAS Details page.

This example illustrates the fields and controls on the Documentation region – CAS Details page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Offer Documents	<p>Enter a value up to a maximum of 2000 characters.</p> <p>The value is used to derive the DocumentsUsedToObtainOffer field in the Upload extract.</p>
ATAS Certificate Required	<p>The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>You can select a different value if required.</p>

Field or Control	Description
Dean's Certificate Required	<p>The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>You can select a different value if required.</p>

Sponsor Notes

The following is an example of the Sponsor Notes region on the CAS Details page.

This example illustrates the fields and controls on the Sponsor Notes region – CAS Details page. You can find definitions for the fields and controls later on this page.

To notify UKVI of corrections to the applicant data, an institution adds Sponsor Notes to a CAS record through SMS. You can use Notes field to enter the same notes to a CAS record in the system. This enables you to maintain the Sponsor Notes locally. The system does not include the Notes field value in the Upload extract data.

Entering PBI Report Data for Applicants or Students

Access the Report Details page (**Student Admissions >PBI Processing >CAS Maintenance >Report Details**).

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

[New Window](#) | [Customize Page](#) | [http](#)

CAS Details	Report Details
Name: Jonathon Redmond	ID: ADM1010 Personal Information
Academic Institution: PeopleSoft University	Record Type: Applicant Maintain Applications
Academic Career: Undergraduate	Student Career Nbr: 0
Record Number: 1	Residency: Home/United Kingdom
Application Number: 00024725	Program Number: 0
Academic Program: Liberal Arts Undergraduate	Campus: Main Hacienda Campus
Admit Term: 2014 Fall	Academic Load: Full-Time

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Effective Date: 22/02/2011	Effective Sequence: 1
Report Status: Report Ready	Report File ID:
Expected Enrollment: 25/02/2011 [3]	
Notes: <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>	

Field or Control	Description
Report Status	<p>Identifies whether the record has been identified as:</p> <ul style="list-style-type: none"> To be included in the Report extract (<i>Report Ready</i>). Included in the Report extract (<i>Report Complete</i>). <p>You can set report status to <i>Report Ready</i>, only if the CAS Number is populated and the CAS Status of the record is <i>Used</i>.</p>
Report File ID	Displays the File ID generated when the record is included in the Report extract.
Expected Enrollment	<p>The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term and Cohort Tag (if defined) from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If default value does not exist at these three levels, then the system sets the field as blank.</p> <p>You can override the default value. The value must be on or before the Latest Acceptance Date defined on the Course Details region of the CAS Details page.</p>
Notes	<p>Enter a value up to a maximum of 2000 characters.</p> <p>The value is used to derive the Notes field for the Report extract.</p>

Updating Multiple CAS Records

Use the CAS Record Update process if you want to update a group of CAS records in Campus Solutions at the same time. You can select the group of CAS records based on selection criteria, including:

- Academic career, program or plan.
- Students or applicants.
- Admit term.
- Upload, Update or Report status.

This section discusses how to update multiple CAS Records.

Note: This process can only be used to update multiple CAS records with a single value per field. Updates that require a different value for each CAS record, for example updates to Course Fees Paid that may vary by applicant or student, should be made using the CAS Details page.

Page Used to Update Multiple CAS Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CAS Record Update	SAD_PB_CAS_UPD	Student Admissions > PBI Processing > CAS Record Update	Update multiple CAS records.

Updating Multiple CAS Records

Access the CAS Record Update page (**Student Admissions > PBI Processing > CAS Record Update**).

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

CAS Record Update

Run Control ID: NG01 [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria

*Academic Institution: PeopleSoft University UK

Academic Career: Undergraduate

Academic Program: Bachelor of Arts

Academic Plan:

Admit Term: 2009-2010 Academic Year

Record Type:

Upload Status:

Update Status:

Report Status:

Population Selection

Selection Tool: [Edit Prompts](#)

Query Name: [Launch Query Manager](#) [Preview Selection Results](#)

This example illustrates the fields and controls on the CAS Record Update page (2 of 2). You can find definitions for the fields and controls later on this page.

New Value Details

Effective Date:

Statuses

Upload Status: Update Status:

Report Status:

Course Details

Course Start Date: Expected End Date:

Latest Acceptance Date: Expected Enrollment Date:

Fee Details

First Year Course Fees: First Year Boarding Fees:

Course Fees Paid: Accommodation Fees Paid:

Boarding Fees Paid:

Use the Selection Criteria region to specify the group of CAS records that you want to update.

Use the Population Selection region to further filter the records that are selected for update by selected a PS Query value.

Use the New Value Details region to specify the values that are updated by the process.

Population Selection

Population selection is a method of selecting the IDs to process a specific transaction. The Population Selection group box appears on the run control pages when the Population Selection process is available or required for the transaction.

The system writes the CAS records returned from any query specified under Population Selection to SAD_PB_CAS_RES. The query must return the following values to uniquely identify the CAS records that need to be updated:

- EMPLID
- INSTITUTION
- SAD_PB_REC_TYPE
- ACAD_CAREER
- STDNT_CAR_NBR
- SAD_PB_REC_NUMBER
- ADM_APPL_NBR (blank for record type = student)
- APPL_PROG_NBR (blank for record type = student)

For each distinct CAS record, the query automatically selects the most recent effective dated/sequenced row for further filtering before the process creates a new row.

A sample query, SAD_PB_CAS_RECORD_UPDATE, has been delivered. This query selects the most recent effective dated rows for all the CAS records of an institution.

See "Understanding the Population Selection Group Box" (Campus Community Fundamentals)

After specifying the changes on the New Value Details region, when you run the process:

1. The process selects the CAS records based on the specified criteria.
2. In each CAS record, it inserts a new row with an effective date equal to the Effective Date parameter value or, if the most recent row has the same effective date as the Effective Date parameter value, the sequence number is incremented.
3. In the new row, the process makes the changes based on the parameters you specified on the New Value Details region. The rest of the fields in the new row contain the values from the previous row.

The following table describes how the CAS Record Update process determines whether or not to update a CAS record value:

Process Parameter	Conditions
Effective Date	If the most recent existing CAS record row has an effective date later than the parameter value, the process logs a message and skips the update for that record.
Upload Status	Only updated if the Upload Status field is enabled in the CAS record, that is the CAS Number is not populated.
Update Status	Only updated if the Update Status field is enabled in the CAS record, that is the CAS Number is populated and the CAS Status is blank or <i>Assigned</i> .
Report Status	No conditions.
Course Start Date	No conditions.
Expected End Date	Only updated if the date is after the new/existing Course Start Date.
Latest Acceptance Date	Only updated if the date is after the new/existing Course Start Date and is before the new/existing Expected End Date.
Expected Enrollment Date	Only updated if the date is not after the new/existing Latest Acceptance Date.
First Year Course Fees	Only updated if the value is greater than zero.
First Year Boarding Fees	Only updated if the value is greater than zero.
Course Fees Paid	Only updated if the value is greater than zero and is not greater than the new/existing First Year Course Fees value.
Accommodation Fees Paid	Only updated if the value is greater than zero and is not greater than the new/existing First Year Course Fees value.
Boarding Fees Paid	Only updated if the value is greater than zero and is not greater than the new/existing First Year Boarding Fees value.

If any of Course Fees Paid, Accommodation Fees Paid or Boarding Fees Paid is updated and the Update Status field is currently enabled then the Update Status is updated to the value defined for 'Update Required' in the PBI configuration record, unless a new Update Status is specified in the Statuses region in which case that value is used for the update.

There is no validation applied to updates to Course Fees Paid, Accommodation Fees Paid or Boarding Fees Paid to check that the Update Status field is enabled. Values for the fields will be updated even if the Update Status in the CAS Details record is disabled following the update of the CAS Status to one of the post-assigned values. You should ensure that updates to the three Fees Paid fields are only made for records where the Update Status field is enabled.

Generating an XML File to Send to SMS

This section discusses how to:

- Generate an extract.
- Review an extract.
- Create an XML file from an extract.
- Validate an XML file.

Pages Used to Generate an XML file to send to SMS

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Extract Data	SAD_PB_CRT_EXT	Student Admissions > PBI Processing > Create Extract	Generate the Upload, Update, or Report extract data.
Upload Extract Data	SAD_PB_UPL_EXT	Student Admissions > PBI Processing > Upload Extract Data	Review and edit the upload extract data.
Update Extract Data	SAD_PB_UPD_EXT	Student Admissions > PBI Processing > Update Extract Data	Review and edit the update extract data.
Report Extract Data	SAD_PB_REP_EXT	Student Admissions > PBI Processing > Report Extract Data	Review and edit the report extract data.
Create XML	SAD_PB_GXML	Student Admissions > PBI Processing > Create XML	Generate the XML file from the extract data.
Validate XML	SAD_PB_VALX_PRC	Student Admissions > PBI Processing > Validate XML	Validate the XML file.

Generating an Extract

Access the Create Extract Data page (**Student Admissions > PBI Processing > Create Extract**).

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

Create Extract Data

Run Control ID: **EXTRACT02** [Report Manager](#) [Process Monitor](#) Run

PBI Extract

Academic Institution

☒ Create Upload
 ☐ Create Update
 ☐ Create Report

☒ Include Applicants
 ☒ Include Students

Upload File ID Override

Update File ID Override

Report File ID Override

Field or Control	Description
Create Upload	Select to create Upload extract data. If you select this check box, the process selects CAS Details records with an Upload status of <i>Upload Ready</i> .
Create Update	Select to create the Update extract data. If you select this check box, the process selects CAS Details records with an Update status of <i>Update Ready</i> .
Create Report	Select to create the Report extract data. If you select this check box, the process selects CAS Details records with a Report status of <i>Report Ready</i> .
Include Applicants	Select to create extract data for only applicants. If you select this check box, the process selects CAS Details records with record type <i>Applicant</i> .
Include Students	<p>Select to create extract data for only students. If you select this check box, the process selects CAS Details records with record type <i>Student</i>.</p> <hr/> <p>Note: You should not clear both the Include Applicants and the Include Students check boxes. You must select one of the check boxes to run the process. Also, you can select both the check boxes to include both applicant and student records.</p> <hr/>

Field or Control	Description
Upload File ID Override	<p>If you do not enter an override value, the process automatically generates a value in the format INST_UPLOAD_YYYY_MM_DD_nn where INST is your institution code and nn is a sequence number that begins 01 and is incremented for new runs of the extract process on that date. For example, a File ID of PSUNV_UPLOAD_2010_06_26_01 will be generated for the first upload extract for institution PSUNV on the 26th June 2010.</p> <p>Enter a File ID value to be used in place of the automatically generated value if required. The value must not have already been used for an Update or Report extract. If an extract for the File ID entered has already been run any existing extract data records will be deleted before the process is re-run.</p>
Update File ID Override	<p>If you do not enter an override value, the process automatically generates a value in the format INST_UPDATE_YYYY_MM_DD_nn where INST is your institution code and nn is a sequence number that begins 01 and is incremented for new runs of the extract process on that date.</p> <p>Enter a File ID value to be used in place of the automatically generated value if required. The value must not have already been used for an Upload or Report extract. If an extract for the File ID entered has already been run any existing extract data records will be deleted before the process is re-run.</p>
Report File ID Override	<p>If you do not enter an override value, the process automatically generates a value in the format INST_REPORT_YYYY_MM_DD_nn where INST is your institution code and nn is a sequence number that begins 01 and is incremented for new runs of the extract process on that date.</p> <p>Enter a File ID value to be used in place of the automatically generated value if required. The value must not have already been used for an Upload or Update extract. If an extract for the File ID entered has already been run any existing extract data records will be deleted before the process is re-run.</p>

Create Upload check box

If the Create Upload check box is selected, CAS Details records with an Upload Status of *Upload Ready* are selected. The process selects applicant records, if the Include Applicants check box is selected. The process selects student records, if the Include Students check box is selected. If you have selected both the Include Students and Include Applicants check boxes, the process selects both applicant and student records.

If an Upload File ID Override value is selected, any existing extract records are deleted before new records are selected.

If you have selected both Include Applicants and Include Students check boxes, the process includes one record for each applicant or student. If there is more than one CAS Details record with an Upload Status of *Upload Ready*, the first record selected is included and a message is logged for any subsequent records selected by the process. The additional records can be included in a future extract or the Upload Status

can be set to the appropriate status to prevent the record from being included if a second CAS request is not required.

After a CAS Details record is included by the process, a new effective dated record is created to set the Upload Status to *Upload Complete* and to populate the Upload File ID.

Create Update check box

If the Create Update check box is selected, CAS Details records with an Update Status of *Update Ready* and the CAS Number populated are selected. The process selects applicant records, if the Include Applicants check box is selected. The process selects student records, if the Include Students check box is selected. If you have selected both the Include Students and Include Applicants check boxes, the process selects both applicant and student records.

If an Update File ID Override value is selected any existing extract records are deleted before new records are selected.

The same value is derived for each record in the Upload extract for the Update File ID field.

After a CAS Details record is included by the process, a new effective dated record is created to set the Update Status to *Update Complete* and to populate the Update File ID.

If an Event ID is set up on the PBI Configuration page for Record Type = *Applicant* or *Student* and Notification Type = *Fee Update*, the process creates the 3C Engine Trigger result for the Event ID and person.

For steps that you should perform after the process creates the 3C Engine Trigger result, see [Generating PBI Communications](#)

Create Report check box

If the Create Report check box is selected, CAS Details records with a Report Status of *Report Ready* and the CAS Number populated are selected. The process selects applicant records, if the Include Applicants check box is selected. The process selects student records, if the Include Students check box is selected. If you have selected both the Include Students and Include Applicants check boxes, the process selects both applicant and student records.

If a Report File ID Override value is selected any existing extract records are deleted before new records are selected.

The same value is derived for each record in the Upload extract for the Report File ID field.

After a CAS Details record is included by the process, a new effective dated record is created to set the Report Status to *Report Complete* and to populate the Report File ID.

Refer to the PBI Field Derivation documentation for information about derivation of each field in the extract.

Reviewing an Extract

Use the Upload Extract Data, Update Extract Data, and Report Extract Data pages to review the extract data that the Create Extract process has generated prior to creating the XML file.

This example illustrates the fields and controls on the Upload Extract Data page (part). You can find definitions for the fields and controls later on this page.

Upload Extract Data

Applicant ID: SR5000 Sandra Ross
Extract Date: 19/04/2010

Upload File ID: PSUNV_UPLOAD_2010_04_19_01
☐ Exclude from XML

File Details

Field	Derived Value	Derivation Step	Reported Value	Derived Value Overridden
Schema ID	T4General Ready To Go	1	<input type="text" value="T4General Ready To Go"/>	<input type="checkbox"/>
Tier ID	Tier 4	1	<input type="text" value="Tier 4"/>	<input type="checkbox"/>
Category	General	1	<input type="text" value="General"/>	<input type="checkbox"/>
Sponsor Licence Number	H87485777	2	<input type="text" value="H87485777"/>	<input type="checkbox"/>

Applicant Details

Field	Derived Value	Derivation Step	Reported Value	Derived Value Overridden
UCAS Personal ID		2	<input type="text"/>	<input type="checkbox"/>
Application ID	000226090	1	<input type="text" value="000226090"/>	<input type="checkbox"/>
Family Name	Ross	1	<input type="text" value="Ross"/>	<input type="checkbox"/>
Given Name	Sandra	1	<input type="text" value="Sandra"/>	<input type="checkbox"/>
Other Names		2	<input type="text" value="Alison"/>	<input checked="" type="checkbox"/>
Nationality	AUS	1	<input type="text" value="AUS"/>	<input type="checkbox"/>
Gender	2	1	<input type="text" value="2"/>	<input type="checkbox"/>
Country of Birth	AUS	1	<input type="text" value="AUS"/>	<input type="checkbox"/>
Place of Birth	Sydney	1	<input type="text" value="Sydney"/>	<input type="checkbox"/>
Date of Birth	1981-04-15	1	<input type="text" value="1981-04-15"/>	<input type="checkbox"/>
Applicant Passport/Travel Document Number	58640967907	1	<input type="text" value="58640967907"/>	<input type="checkbox"/>

Field or Control	Description
Exclude from XML	Select to prevent an individual record from being included in the XML file when the Create XML process is run for the File ID.

Field or Control	Description
Reported Value	<p>Displays the derived value for the field. You can change this value if a different value is required in the XML file to be sent to SMS.</p> <p>If the derived value is overwritten in the extract data you should ensure that the corresponding data in the CAS Details record is also updated.</p> <p>In cases where both General and Child category records are included in the upload extract data the Schema ID and Category values can be overridden for the Child records in the Reported Value field.</p>
Derived Value Overridden	The system automatically selects the check box if you use the Reported Value field to change the derived value.

Creating an XML File from an Extract

Access the Create XML page (**Student Admissions > PBI Processing > Create XML**).

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

Field or Control	Description
Extract Type	Select an extract type to filter the prompt values for the File ID field.
Extract Date	Select an extract date to filter the prompt values for the File ID field.
File ID	Select the extract that you want to process.

Field or Control	Description
XML Path/File Name	<p>Enter the file path and file name that you want the system to use to save the XML file. You must enter a valid directory path that maps to a folder with appropriate Read/Write permissions. If you cannot locate such a folder, consult your system administrator.</p> <p>If defined the file name element must include the lower case .xml extension:</p> <ul style="list-style-type: none"> Windows format - \\server\folder\filename.xml Unix format - //server/folder/filename.xml <p>If you enter the file path and do not specify the file name, the process uses the File ID value to name the XML file. The format without the file is as follows:</p> <ul style="list-style-type: none"> Windows format - \\server\folder Unix format - //server/folder

Upload Extract XML

For the upload extract the process creates a separate XML file for each combination of the header fields found in the extract data for the File ID:

<BulkUploadFileId>

<SchemaID>

<TierID>

<Category>

<SponsorLicenceNumber>

In cases where there are multiple Sponsor Licence Numbers in the upload extract data multiple XML files are created. If there are both General and Child category records multiple XML files are created. If multiple XML files are required a sequence letter (A, B, C etc) is added to the file name to distinguish between the files.

For cases where the process is being re-run, if there is an existing file for the specified path/file name then that file is overwritten.

Update and Report Extract XML

A single XML file is created for each File ID for update and report extract data.

For cases where the process is being re-run, if there is an existing file for the specified path/file name then that file is overwritten.

Validating a XML File

Access the Validate XML page (**Student Admissions > PBI Processing > Validate XML**).

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

<i>Field or Control</i>	<i>Description</i>
XML Path/File Name	Enter the path and file name of the XML file that you want to validate.
XSD Path/File Name	<p>Enter the complete path and file name of the primary XSD file. The process uses all of the XSD files to validate your XML file.</p> <p>The XSD files are available from the UKVI website.</p>

The process validates the XML and checks that it is well formed in the context of the defined schema.

If any errors are reported by the Validate XML process, correct the errors by amending the Reported Value in the Extract Data pages or by amending the CAS Details or related records.

If you have corrected the errors using the Extract Data pages, re-run the Create XML process and validate the file. If you have corrected the errors in the CAS Details or related records, re-run the Create Extract process, re-run the Create XML process and validate the file.

Once the XML file passes schema validation, submit the XML file to SMS via the UKVI portal.

Importing CAS Details

After you send one or more CAS number requests to SMS, use the Import CAS Details process to import the CAS details from the Bulk Export XML file retrieved from SMS.

When you run the process:

1. Initially it processes the XML file and creates CAS records in the staging tables.

- Then it processes the staging table records to either update an existing CAS record with the CAS number and status details or create a new CAS record where you have submitted the CAS request directly via the UKVI portal.

Each CAS record in the staging table has an import status. The following table describes how the process determines which import status to assign to a CAS staging record.

Condition	Status Set By the Import Process
The status is initially set to this value for each new record imported to the staging table from the XML file.	New (N)
The import process did not find a matching CAS Details record.	Pending (P)
The import process encountered a problem when identifying a CAS Details record (for example, there is an existing CAS Details record but it is future dated).	Error (E)
The status is set to this value for each staging record where the corresponding CAS record has been created or updated with the imported CAS details.	Imported (I)

Use the CAS Staging Data pages to review the staging records that have Pending or Error status. For records with Pending status, you can use the CAS Staging Data page to match the record with an existing application or student program record and create a new CAS record. For records with Error status, you can use the CAS Details page to correct or update the existing records to allow the staging record to be re-processed.

This section discusses how to:

- Import and create CAS records in bulk.
- Review and edit the CAS staging data.

Pages Used to Import CAS Records

Page Name	Definition Name	Navigation	Usage
Import CAS Details	SAD_PB_IMPC_PRC	Student Admissions > PBI Processing > Import CAS Details	Import the CAS details from the Bulk Export XML file provided by SMS.
CAS Staging Data	SAD_PB_I_CAS	Student Admissions > PBI Processing > CAS Staging Data	Review the records that the Import CAS Details has loaded into the staging tables.

Importing CAS Details

Access the Import CAS Details page (**Student Admissions** > **PBI Processing** > **Import CAS Details**).

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

Field or Control	Description
Add Attachment	<p>Click to browse to the XML file that you want to import, and click Upload.</p> <p>You can browse your local drive and select a file. When you click Upload, the system automatically copies the file to the application server and the XML Path/File Name field automatically displays the server path and file name.</p> <hr/> <p>Note: The upload process creates a <i>files</i> subdirectory to store and process the XML files. This subdirectory is created in the server directory location that is specified in the PS_SERVDIR system parameter in the Application Server/Process Scheduler configuration file psappsrv.cfg/psprcs.cfg. Ensure that PS_SERVDIR is set up with an appropriate value in the configuration file and that users have the correct permission to access the files subdirectory.</p>
XML Path/File Name	<p>Enter the path and file name of the XML file that you want to import. You must store this XML file on an application server that the import process can access.</p> <p>If you want to reprocess the staging records, leave the field blank.</p>

Processing steps

The process performs the following steps to create new staging table records if the XML Path/File Name parameter has been provided:

1. Deletes any existing staging records with a status of *Obsolete*.
2. Deletes any existing staging records with a status of *Imported*.

3. Opens the XML file. If the XML file cannot be found a message is logged and the re-processing of any existing staging records continues.
4. Creates staging records with a status of New for each record found in the XML file.

The process then performs the following steps to process staging records that have an import status of *Pending* from a previous run of the process:

1. *Create*: If the application or student program details have been added via the CAS Staging Data page and there is no existing CAS Details record, a new record is created using the application or student program details added and the CAS Number, CAS Status, CAS Status Date and Export File ID from the staging record. The Upload Status is set to Upload Complete and the Nationality value is populated if a country value exists in the staging record.
2. *Update*: If the application or student program details have been added via the CAS Staging Data page and there is an existing CAS Details record without the CAS Number populated, a new effective dated record is created for the current date with the CAS Number, CAS Status, CAS Status Date and Export File ID from the staging record.
3. *Pending*: If the full application or student program details have not been added via the CAS Staging Data page a message is logged and the record remains with a status of Pending.
4. *Error*: If the applicant or student details have been added via the CAS Staging Data page and there is an existing CAS Details record with a different CAS Number already populated then an error message is logged and the status is set to Error.

The process performs the following step to process New staging records and Error records from a previous run of the import process:

1. *Update CAS Status*: If the staging record can be matched to an existing CAS Details record using Applicant ID (EMPLID) and CAS Number, a new effective dated record is created with the CAS Status, CAS Status Date and Export File ID from the staging record.

This processing will occur when the CAS Number has already been imported and the CAS Status is being updated from, for example, *Assigned* to *Used*.

Note: If the most recent existing effective dated record is in the future or there are multiple matching records, a message is logged and the import status is set to Error.

2. *Update Applicant*: If Application ID is populated and the staging record can be matched to an existing applicant CAS Details record using Applicant ID (EMPLID) and Application ID (the combination of Admission Application Number and Application Program Number), a new effective dated record is created with the CAS Status, CAS Status Date and Export File ID from the staging record. This processing will occur when the CAS Number is being imported for the first time and the CAS request has been generated from an existing CAS Details record.

Note: If the most recent existing effective dated record is in the future or there are multiple matching records, a message is logged and the import status is set to *Error*.

3. *Update Student*: If the Application ID is not populated and the staging record can be matched to an existing student CAS Details record using Applicant ID (EMPLID) and Course ID (either Academic Plan or Academic Sub-Plan if sub-plan reporting is enabled on the PBI Configuration page), a new effective dated record is created with the CAS Status, CAS Status Date and Export File ID from the staging record.

Note: If the most recent existing effective dated record is in the future or there are multiple matching records, a message is logged and the import status is set to *Error*.

4. *No Match:* If no match is made to an existing CAS Details record the status is set to Pending. The staging record can be reviewed via CAS Staging Data page and the application or student program details can be added to allow the record to be re-processed.

Assigning Event IDs to the Applicant or Student for CAS Number Notification

If you have defined an event ID for a notification type of *CAS Number* on the PBI Configuration page, the import process assigns the event ID when it creates a new CAS record or when it creates a new effective dated row for an existing CAS record and the CAS Number is being populated for the first time. If the process is updating an existing CAS record where the CAS number is already populated the Event ID is not created.

To assign the event details to the applicant or student, the process creates a results record in the 3C Engine Trigger Results table for Institution, Event ID and Function (CASN) for the applicant or student EMPLID. The variable data associated with the CASN administrative function (Academic Career, Student Career Number and CAS Number) are also populated.

See [Generating PBI Communications](#)

Reviewing and Editing the CAS Staging Data

Access the CAS Staging Data page (**Student Admissions > PBI Processing > CAS Staging Data**).

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

CAS Staging Data

Academic Institution	PSGBR	Export File ID	Export_2302B
Import Status	Error	Extract Date	07/03/2011
CAS Number	E4G7TA2A09E0A6		
CAS Status	CANCELLED	CAS Status Date	07/03/2011
ID	0094	Date of Birth	1996-02-21
Family Name	Drummond	Given Name	Dave
Nationality	AUS	Passport Number	3546954678
Application ID	00025100		
Course ID	MUSIC	Course Title	Music Performance (BFA)
Course Start Date	23/05/2011	Expected End Date	12/12/2014

CAS Record Details

Record Type:		CAS Details
Academic Career:		Maintain Applications
Student Career Nbr:	0	Student Program/Plan
Application Number:		
Program Number:	0	

Use the search page to retrieve *Pending* or *Error* status records for review and update.

Use the Maintain Applications or Student Program/Plan links to search for and review existing application or student program records.

Use the CAS Details link to search for and review any existing CAS Details records.

For a record with an import status of *Error*, you can correct the existing CAS Details record to allow the staging record to be re-processed when the Import CAS Details process is next run (Use the CAS Record Details region and CAS Details link for the correction). You can also match an error record with a different ID and then have the system re-process the record when the Import CAS Details process is next run. The ID field is available for entry only if the record has an import status of *Error*.

The system enables the CAS Record Details region if the import status is either *Pending* or *Error*. If you want to match the staging record with an existing application or student program record for re-processing:

1. Specify whether the new CAS Details record is for an applicant or student by selecting a value in the Record Type field.
2. Select the Academic Career for the applicant or student from the prompt.
3. Select the Student Career Number for the applicant from the prompt.
4. If the record type is applicant, select the Application Number from the prompt.
5. If the record type is applicant, select the Program Number from the prompt.
6. Save the record.

Deleting CAS Staging Records

You can delete records that are no longer required for processing. To delete a record:

1. Change the import status to *Obsolete*.
2. Save the record.
3. When you run the Import CAS Details process, the system deletes the records with the *Obsolete* status.

Note: Imported staging records cannot be deleted.

Generating PBI Communications

After the system assigns event IDs, use the following process to notify applicants or students about CAS Number or fee update details:

1. Use the 3C Engine Trigger Results page to view the result records that have been added (**Campus Community >3C Engine >3C Engine Trigger Results**).
2. Run the 3C Engine process for each event ID.
3. Use the Person Communication page to view the assigned communication.

- Run the Communication Generation process to create the communication that you can send to applicants and students.

This section describes the steps to assign and generate communications for CAS Number and fee update notifications.

Related Links

"Understanding Communication Management" (Campus Community Fundamentals)

"Understanding the 3C Engine" (Campus Community Fundamentals)

[Setting Up PBI Communications](#)

Reviewing 3C Engine Trigger Results

Access the 3C Engine Trigger Results page (**Campus Community >3C Engine >3C Engine Trigger Results**).

Use the 3C Engine Trigger Results page to review records that the Import CAS Details process or the Create Extract - update process creates.



Use the page to add any additional records required. Select Variable Data to add the required values for any additional records added.















This example shows the 3C Engine Trigger Results page for CAS Number notification.

3C Engine Trigger Results

Institution: PeopleSoft University

Event ID: CASA CAS Applicant

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

Trigger Detail 1	Trigger Detail 2								
	*ID Type	*ID	Name	*Trigger Status	Function		Variable Data	*Date Added	
1	Person	SR13202	Calhoun,David R	Processed	CASN	CAS Notf	Variable Data	31/03/2010	 
2	Person	SR13203	Chung,Tony	Processed	CASN	CAS Notf	Variable Data	31/03/2010	 
3	Person	SR13204	Daniel,Christine S	Processed	CASN	CAS Notf	Variable Data	31/03/2010	 
4	Person	SR13205	Delgado,Phillip R	Processed	CASN	CAS Notf	Variable Data	31/03/2010	 
5	Person	SR13206	Ferrum,Robin L	Processed	CASN	CAS Notf	Variable Data	31/03/2010	 
6	Person	SR13207	Foster,Cela	Processed	CASN	CAS Notf	Variable Data	31/03/2010	 
									

Running the 3C Engine Process

Access the 3C Engine Parameters page (**Campus Community >3C Engine >Run 3C Engine**).

This example illustrates the fields and controls on the 3C Engine Parameters page.

Run the 3C Engine process for each of the Event IDs defined on the PBI Configuration page. The process assigns communications, comments and checklists associated with the Event ID to the ID of the applicant or student.

Assigned communications can be reviewed on the Person Communication page. To navigate to the Person Communication page, select **Campus Community >Communications >Person Communications >Communication Management >Person Communication**.

Running the Communication Generation Process

Access the Selection Parameters page (**Campus Community >Communications >Communication Generation**).

Run the Communication Generation process for each standard letter code to generate the communications for the assigned communications.

The following example shows that the Communication Method is set to *E-Mail*. Note that the ID Selection value should be set to *All Person IDs* rather than *All IDs* as shown on the example.

Selection Parameters

Process Parameters

Email Parameters

Checklist Parameters

Run Control ID: NG01
[Report Manager](#)
[Process Monitor](#)
Run

ID Selection

ID Selection: All IDs

Letter Code Selection

*Letter Code: CAS Applicant
Administrative Function: CASN CAS Notification

Template Selection

Report Name
CASA
CAS Applicant
View Report Definition

Data Source ID: CASA

Template List

First 1 of 1 Last

Template ID	Description	Language	Method	Default Template
CASA_1		English	E-Mail	<input checked="" type="checkbox"/>

Enclosures Assigned (Softcopy)

No Matching Template Found

☒ Use Default Template
☐ Do Not Produce Communication

Refresh Enclosure List

Communication Language Usage

☒ Specified
Language English
☐ Preferred

Communication Method Usage

☒ Specified
Method E-Mail
☐ Preferred

Define the Person Communication Usage values on the Process Parameters page.

This example illustrates the fields and controls on the Process Parameters page (1 of 2).

The screenshot displays the 'Process Parameters' page with the following sections:

- Navigation Tabs:** Selection Parameters, Process Parameters (active), Email Parameters, Checklist Parameters.
- Run Control ID:** NG01
- Links:** Report Manager, Process Monitor, Run (button).
- Usage Tables:**
 - Person Communication Usage:**
 - Address: Land Address and Email Address (dropdown)
 - Address Name: Primary Full (dropdown)
 - Salutation: Primary Full (dropdown)
 - Extra Name: Primary Full (dropdown)
 - Joint Salutation Usage:**
 - Joint Name: (dropdown)
 - Org Communication Usage:**
 - Org Recipient: Primary Cntc, Pri Dpt, Pri Loc (dropdown)
 - Contact Name: Primary Full (dropdown)
- Communication Processing Dates:**
 - Communication Date Range Selection:**
 - *From Date: 20/03/2010 (calendar icon)
 - *To Date: 21/03/2010 (calendar icon)
 - Update Communication Generation Date With:**
 - ☐ Communication Date
 - ☒ System Date
 - ☐ User Supplied Date
 - Update Communication Completed Date With:**
 - ☐ Communication Date
 - ☒ System Date
 - ☐ User Supplied Date

This example illustrates the fields and controls on the Process Parameters page (2 of 2).

The screenshot displays the 'Process Parameters' page with the following sections:

- Output Settings:**
 - *Sort Option: Country, Postal (dropdown)
 - ☐ Online Preview
 - ☐ Send to Printer
 - ☐ Send to File
 - ☐ Create Envelopes
 - ☐ Create Labels
- Missing Critical Data:**
 - ☒ Produce Communication
 - ☒ Complete Communication

Define the From and Subject values on the Email Parameters page.

This example illustrates the fields and controls on the Email Parameters page.

Selection Parameters Process Parameters **Email Parameters** Checklist Parameters

Run Control ID: NG01 [Report Manager](#) [Process Monitor](#) **Run**

Email Parameters

*From: john.smith@psunv.ac.uk
*Required if communication method usage is specific email or preferred.

*Subject: CAS Number Notification
*Required if communication method usage is specific email or preferred.

Reply to:

Sender:

Bounce to:

Importance

☐ low
☒ normal
☐ high

Sensitivity

☒ normal
☐ personal
☐ private
☐ company-confidential

Review the communications generated by the process on the Communications Management page (**Campus Community >Communications >Person Communications >Communications Management**).

Chapter 29

(GBR) PBI Field Derivation

Understanding PBI Field Derivation

We recommend that you review the field specification, sample XML files, schemas and validation documents available on UKVI web site. The field specification provides information, such as, each field's format, description, whether a field value is required for SMS to issue the CAS number, whether the academic institution must validate a field value using the schema, and whether SMS performs additional validation on the field value when you upload the file.

You can capture the field values at three levels in Campus Solutions:

1. Configuration level.
2. Academic program or plan level.
3. CAS Details level.

For more information about the data capture levels, see [Preparing for PBI Data Exchange](#)

The following table lists the navigation paths for the pages mentioned throughout this PBI field derivation documentation:

<i>Page</i>	<i>Navigation</i>
PBI Configuration	Student Admissions >PBI Processing >PBI Configuration
Academic Plan PBI Data	Set Up SACR >Foundation Tables >Academic Structure >Academic Plan Table >PBI Data
Academic Program PBI Data	Set Up SACR >Foundation Tables >Academic Structure >Academic Program Table >PBI Data
CAS Details	Student Admissions >PBI Processing >CAS Maintenance >CAS Details

See [Understanding PBI Data Exchange](#)

Upload Extract Fields

This section discusses how the Create Extract process derives the field values for the Upload extract. To derive specific fields the following values are determined for each CAS Details record:

- Campus and Academic Program
 - Selected from the current Application Program Data record for applicants.
 - Selected from the current Student Program record for students.
- Academic Plan
 - Selected from the Reported Plan value from the CAS Details page.
 - If no Reported Plan is defined:
 - Selected from the current Application Plan Data record for applicants. If more than one record exists the first plan code alphabetically is selected.
 - Selected from the Student Plan record for students. If more than one record exists the plan with the lowest sequence number is selected.-
- Academic Subplan
 - Selected if Enable Sub-Plan Reporting is checked on the PBI Configuration page.
 - Selected from the current Application Sub-Plan Data record for applicants.
 - Selected from the current Student Sub-Plan record for students.
 - If more than one record exists the first subplan code alphabetically is selected.

Upload File ID

Upload Extract Data page: Header

XML Tag: <BulkUploadFileId>

Mandatory: Yes

Pages Used:

Page	Page Element
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Upload File ID Override

Derivation Steps:

1. Derive from the Upload File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_UPLOAD_YYYY_MM_DD_nn* (for example, PSUNV_UPLOAD_2009_09_27_01), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

Schema ID

Upload Extract Data page: File Details

XML Tag: <SchemaID>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Schema ID

Derivation Steps:

1. Derive the long description value of the translate value defined on the PBI Configuration page.

Tier ID

Upload Extract Data page: File Details

XML Tag: <TierID>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Tier ID

Derivation Steps:

1. Derive the long description value of the translate value defined on the PBI Configuration page.

Category

Upload Extract Data page: File Details

XML Tag: <Category>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Category

Derivation Steps:

1. Derive the long description value of the translate value defined on the PBI Configuration page.

Sponsor Licence Number

Upload Extract Data page: File Details

XML Tag: <SponsorLicenceNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Sponsor Licence Number Campus Sponsor Licence Number

Derivation Steps:

1. Derive the value defined for the Campus of the applicant or student defined on the PBI Configuration page.
2. Derive the value defined for the institution on the PBI Configuration page.

Applicant ID

Upload Extract Data page: Header

XML Tag: <ApplicantID>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	ID

Derivation Steps:

1. Derive from the CAS Details record.

UCAS Personal ID

Upload Extract Data page: Applicant Details

XML Tag: <UCAS_UKPASS_Id>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	UCAS Personal ID
External System ID (Campus Community, Personal Information, Identification, External System ID)	External System ID

Derivation Steps:

1. Derive from External System ID records with type UC or UP.
2. Derive as null.

Application ID

Upload Extract Data page: Applicant Details

XML Tag: <ApplicationID>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Application Number Program Number

Derivation Steps:

1. Derive as a concatenation of Application Number and Program Number from the CAS Details page.
2. Derive as null for Student record type.

Family Name

Upload Extract Data page: Applicant Details

XML Tag: <FamilyName>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	Last Name: The last name for the current primary name record.
Long Names (Campus Community Personal Information, Biographical, Names, Manage Long Names)	Long Last Name: The long last name for the current primary name record.

Derivation Steps:

1. If any of the long name fields (Long First Name, Long Middle Name or Long Last Name) are defined, and the Long Last Name is populated and is 35 characters or fewer, derive Long Last Name from the current primary name record
2. If either Long First Name or Long Middle Name are defined but Long Last Name is blank, derive as NULL ERROR.
3. If any of the long name fields are defined, and the last unbroken text element of Long Last Name exceeds 35 characters, derive as NULL ERROR.
4. If any of the long name fields are defined and Long Last Name exceeds 35 characters, but can be extracted as distinct elements (names are separated by spaces), then derive as distinct elements working backwards from the long last name provided.
5. Derive Last Name from the current primary name record.

Given Name

Upload Extract Data page: Applicant Details

XML Tag: <GivenName>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	First Name. The first name for the current primary name record.
Long Names (Campus Community Personal Information, Biographical, Names, Manage Long Names)	Long First Name. The long first name for the current primary name record.

Derivation Steps:

1. If any of the long name fields (Long First Name, Long Middle Name or Long Last Name) are defined, and the Long First Name is populated and is 35 characters or fewer, derive Long First Name from the current primary name record
2. If any of the long name fields are defined, and Long First Name is blank, derive as null.

3. If any of the long name fields are defined and Long First Name exceeds 35 characters, derive as NULL ERROR.
4. Derive First Name from the current primary name record.

Note: UKVI have indicated that this field can be blank where the applicant or student only has one name although a first name value is required in Campus Solutions. If required the Reported Value for Given Name can be set to blank on the Upload Extract Data page prior to creating the XML.

Other Names

Upload Extract Data page: Applicant Details

XML Tag: <OtherNames>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	Middle Name. The middle name for the current primary name record.
Long Names (Campus Community Personal Information, Biographical, Names, Manage Long Names)	Long Middle Name. The long middle name for the current primary name record.

Derivation Steps:

1. If any of the long name fields (Long First Name, Long Middle Name or Long Last Name) are defined and derivation of Family name is not step 4 (i.e. elements of Long Last Name are not included); and Long Middle Name is not blank, derive from the current primary name record.
2. If any of the long name fields are defined and derivation of Family name does not follow step 4 (i.e., elements of Long Last Name are not included); and Long Middle Name is blank, derive as null.
3. If any of the long name fields are defined and derivation of Family name follows step 4 (i.e., elements of Long Last Name are included); and Long Middle Name is not blank, derive as Long Middle Name followed by a <space>, then the elements of Long Last Name that were not derived for Family Name.
4. If any of the long name fields are defined and derivation of Family name follows step 4 (i.e., elements of Long Last Name are included); and Long Middle Name is blank, derive the elements of Long Last Name that were not derived for Family Name.
5. Derive Middle Name from the current primary name record.
6. Derive as null.

See [Family Name](#) for its derivation.

Nationality

Upload Extract Data page: Applicant Details

XML Tag: <Nationality>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Nationality

Derivation Steps:

1. Derive from the CAS Details record.

Note: If required the Reported Value can be set to *STATELESS* on the Upload Extract Data page prior to creating the XML. The text must be contained within to pass schema validation.

Gender

Upload Extract Data page: Applicant Details

XML Tag: <Gender>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Gender

Derivation Steps:

1. Derive from the current Biographical History record where Male is derived as 1 and Female is derived as 2.
2. Derive as *NULL ERROR*.

Country of Birth

Upload Extract Data page: Applicant Details

XML Tag: <CountryOfBirth>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Birth Country

Derivation Steps:

1. Derive from the Birth Information record.
2. Derive as *NULL ERROR*.

Place of Birth

Upload Extract Data page: Applicant Details

XML Tag: <PlaceOfBirth>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Birth Location

Derivation Steps:

1. Derive from the Birth Information record.
2. Derive as *NULL ERROR*.

Date of Birth

Upload Extract Data page: Applicant Details

XML Tag: <DateOfBirth>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Date of Birth

Page	Page Element
CAS Details	Report Month/Year Only Report Year Only

Derivation Steps:

1. Derive from the person record. If Report Year Only check box is selected, derived as YYYY. If the Report Month/Year Only check box is selected, derived as YYYY-MM. If neither check box is selected derived as YYYY-MM-DD.
2. Derive as *NULL ERROR*.

Passport Number

Upload Extract Data page: Applicant Details

XML Tag: <ApplicantPassportOrTravelDocumentNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Passport Number

Derivation Steps:

1. Derive from the CAS Details record.

Partner Institution

Upload Extract Data page: Other Institution Details

XML Tag: <Name>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution

Page	Page Element
Academic Program PBI Data	Partner Institution
Organization Table (Campus Community, Organization, Create/Maintain Organizations, Organization Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Partner Institution Sponsor Licence Number

Upload Extract Data page: Other Institution Details

XML Tag: <SponsorLicenceNumber>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Regional (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Regional)	Sponsor Licence Number

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Partner Institution Address 1

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value if the country is either Belgium or the Netherlands the value is derived as a combination of Street (Address Line 3) and Number.

Partner Institution Address 2

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Partner Institution Address 3

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Partner Institution Address 1.

Partner Institution City

Upload Extract Data page: Other Institution Details

XML Tag: <City>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Partner Institution County/Area/District

Upload Extract Data page: Other Institution Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Partner Institution Country

Upload Extract Data page: Other Institution Details

XML Tag: <Country>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Partner Institution Postcode

Upload Extract Data page: Other Institution Details

XML Tag: <PostCode>

Mandatory: If any partner institution details are supplied and country is GBR

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value and Partner Institution Country is GBR, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Overseas Institution

Upload Extract Data page: Other Institution Details

XML Tag: <Name>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Organization Table (Campus Community, Organization, Create/Maintain Organizations, Organization Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Overseas Institution Address 1

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/ Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value, if the country is either Belgium or the Netherlands, the value is derived as a combination of Street (Address Line 3) and Number.

Overseas Institution Address 2

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution

Page	Page Element
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Address 3

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.

4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Overseas Institution Address 1.

Overseas Institution City

Upload Extract Data page: Other Institution Details

XML Tag: <City>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Overseas Institution County/Area/District

Upload Extract Data page: Other Institution Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Country

Upload Extract Data page: Other Institution Details

XML Tag: <Country>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution

Page	Page Element
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Postcode

Upload Extract Data page: Other Institution Details

XML Tag: <PostCode>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.

4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Course Title

Upload Extract Data page: Course Details

XML Tag: <CourseCurriculumTitle>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Course Title Override
PBI Configuration	Enable Sub-Plan Reporting
Sub-Plan HESA (Set Up SACR, Foundation Tables >Academic Structure >Academic SubPlan Table >Sub-Plan HESA)	Course Title
Academic Sub-Plan Table (Set Up SACR, Foundation Tables >Academic Structure >Academic SubPlan Table)	Description
Plan HESA Data (Set Up SACR, Foundation Tables >Academic Structure >Academic Plan Table >Plan HESA Data)	Course Title
Academic Plan Table (Set Up SACR, Foundation Tables >Academic Structure >Academic Plan Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive the Course Title from the Sub-Plan HESA record.
3. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive a concatenation of plan description + space + sub-plan description.
4. Derive the Course Title from the Plan HESA Data record.
5. Derive the plan description.

Course ID

Upload Extract Data page: Course Details

XML Tag: <CourseID>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Enable Sub-Plan Reporting

Derivation Steps:

1. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive the sub-plan code.
2. Derive the plan code.

Academic Level

Upload Extract Data page: Course Details

XML Tag: <AcademicLevel>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Academic Level

Derivation Steps:

1. Derive from the CAS Details record. Derive as the short name (XLATSHORTNAME) from the Translate Values table (PSXLATITEM), for SAD_PB_ACAD_LEVEL.

There are page elements that have translate values. For example, translate values *Preseasonal B1* and *Preseasonal B2* for the Academic Level page element on the CAS Details page. The Create Extract process derives the field value as short name (XLATSHORTNAME) from these page elements. For example, suppose you have defined an academic level translate value on the CAS Details page as *Preseasonal B1* which has a short name of *B1*. In such a case, the Create Extract Data process derives the Academic Level field value as *B1*.

If a Message Number is found for the short name, derive as the message text. If the message is not in the Message Catalog (set number 14260), derive the field as *MESSAGE NOT FOUND*.

Note: The system sets the default Academic Level value on the CAS Details page based on the COURSEAIM defined on the Plan HESA Data, Program HESA Data, or Sub-Plan HESA page. The order in which COURSEAIM is checked: Plan HESA Data page first, then Program HESA Data page and finally Sub-Plan HESA page. The system defaults the NQF level using the first letter of the COURSEAIM value as follows:

D — Doctoral — NQF Level 8
 M — Masters — NQF Level 7
 H — Honours — NQF Level 6
 I — Intermediate — NQF Level 5
 C — Certificate — NQF Level 4

You can change this default value on the CAS Details page.

Secondary Academic Level

Upload Extract Data page: Course Details

XML Tag: <SecondaryAcademicLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Secondary Academic Level

Derivation Steps:

1. Derive from the CAS Details record. Derive as the short name (XLATSHORTNAME) from the Translate Values table (PSXLATITEM), for SAD_PB_ACAD_LEVEL.

If a Message Number is found for the short name, derive as the message text. If the message is not in the message catalog (set number 14260), derive the field as *MESSAGE NOT FOUND*.

2. Derive as null.

Related Links

[Academic Level](#)

Course Start Date

Upload Extract Data page: Course Details

XML Tag: <CourseStartDate>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	CourseStartDate

Derivation Steps:

1. Derive from the CAS Details record.

Note: If the derived date is not in the future an error message is logged.

Latest Acceptance Date

Upload Extract Data page: Course Details

XML Tag: <LatestDateForAcceptanceOnCourse>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Latest Acceptance Date

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Note: If the derived date is not in the future, or is before the derived Course Start Date, or is after the derived Expected Course End Date, an error message is logged.

Expected End Date

Upload Extract Data page: Course Details

XML Tag: <ExpectedCourseEndDate>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Expected End Date

Derivation Steps:

1. Derive from the CAS Details record.

Note: If the derived date is not in the future, or is before the derived Course Start Date, an error message is logged.

Full-Time Course

Upload Extract Data page: Course Details

XML Tag: <CourseIsFullTime>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Full-Time Course

Derivation Steps:

1. If the value in the CAS Details record is Yes, derive as *true*
2. Derive as *false*.

Course Hours

Upload Extract Data page: Course Details

XML Tag: <CourseHoursPerWeek>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Course Hours
Academic Plan PBI Data	Course Hours
Academic Program PBI Data	Course Hours

Note: The Course Hours field is mandatory on the CAS Details page if Full-Time Course is No. The system performs steps 2, 3, or 4 only if Full-Time Course is Yes on the CAS Details page.

Derivation Steps:

1. Derive from the CAS Details record.

2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Full-Time Course is derived as true, derive as *0.0*

Main Site Address 1

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR >Foundation Tables >Academic Structure >Campus Table)	Location Code
Location Address (Set Up Common Objects, >Foundation Tables >Organization >Location)	Address Line 1

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR*.

Main Site Address 2

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR >Foundation Tables >Academic Structure >Campus Table)	Location Code
Location Address (Set Up Common Objects, >Foundation Tables >Organization >Location)	Address Line 1

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site Address 3

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR >Foundation Tables >Academic Structure >Campus Table)	Location Code
Location Address (Set Up Common Objects, >Foundation Tables >Organization >Location)	Address Line 3

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.

3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site City

Upload Extract Data page: Course Details

XML Tag: <City>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR >Foundation Tables >Academic Structure >Campus Table)	Location Code
Location Address (Set Up Common Objects, >Foundation Tables >Organization >Location)	City

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR*.

Main Site County/Area/District

Upload Extract Data page: Course Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site

Page	Page Element
CAS Details	Reported Site
Campus Table (Set Up SACR >Foundation Tables >Academic Structure >Campus Table)	Location Code
Location Address (Set Up Common Objects, >Foundation Tables >Organization >Location)	County (UK addresses) State

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site Postcode

Upload Extract Data page: Course Details

XML Tag: <PostCode>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR >Foundation Tables >Academic Structure >Campus Table)	Location Code
Location Address (Set Up Common Objects, >Foundation Tables >Organization >Location)	Post Code

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.

4. Derive as *NULL ERROR*.

Work Placement

Upload Extract Data page: Course Details

XML Tag: <ApplicantHasWorkPlacement>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Work Placement

Derivation Steps:

1. Derive from the CAS Details record.

Note: Yes is derived as *true*, No is derived as *false*.

Work Placement Percentage

Upload Extract Data page: Work Placement Details

XML Tag: <WorkPlacementPercentage>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Percentage

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.
2. Derive as null.

Note: On the CAS Details page, a Placement Percentage value is mandatory for Upload Ready status if Work Placement is Yes.

Work Placement Justification

Upload Extract Data page: Work Placement Details

XML Tag: <WorkPlacementJustificationText>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Justification

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Note: On the CAS Details page, a Placement Justification value is mandatory for Upload Ready status if Placement Percentage is greater than 033.

Work Placement Address 1

Upload Extract Data page: Work Placement Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.

4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value if the country is either Belgium or the Netherlands the value is derived as a combination of Street (Address Line 3) and Number.

Work Placement Address 2

Upload Extract Data page: Work Placement Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Work Placement Address 3

Upload Extract Data page: Work Placement Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Work Placement Address 1.

Work Placement City

Upload Extract Data page: Work Placement Details

XML Tag: <City>

Mandatory: If any work placement details are supplied

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation

Page	Page Element
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Work Placement Address 1 has a value, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Note: The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Work Placement County/Area/District

Upload Extract Data page: Work Placement Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.

2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Work Placement Country

Upload Extract Data page: Work Placement Details

XML Tag: <Country>

Mandatory: If any work placement details are supplied

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Work Placement Postcode

Upload Extract Data page: Work Placement Details

XML Tag: <PostCode>

Mandatory: If any work placement details are supplied and country is GBR

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Work Placement Address 1 has a value and Work Placement Country is GBR, derive as NULL ERROR, otherwise derive as null.

Note: The address fields are derived from the current active primary location for the selected organization.

Secure English Language Test (SELT) Required

Upload Extract Data page: Evidence Details

XML Tag: <SELTRequired>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	SELT Required

Derivation Steps:

1. Derive from the CAS Details record. Yes is derived as *true*, No is derived as *false*.

Reason SELT Not Required

Upload Extract Data page: Evidence Details

XML Tag: <ReasonSELTNotRequired>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Reason SELT Not Required

Derivation Steps:

1. Derive as the short translate value from the CAS Details record. If a message number is found in the short translate value, then derive the message text. Else derive the short translate value. *
2. Derive as null.

* One of the valid values - *ENG_COUNTRY* - is too long to be held as short translate name (maximum is 10 characters) in the system. For *ENG_COUNTRY*, the short translate value is set to a message number (93).

Note: On the CAS Details page, a Reason SELT Not Required value is mandatory for Upload Ready status if SELT Required is *No*.

English Language Level Attained

Upload Extract Data page: Evidence Details

XML Tag: <EnglishLanguageLevelAttained>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Level Attained

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.

If a Message Number is found for the short translate value, derive as the message text. If the message is not in the message catalog (set number 14260), derive the field as *MESSAGE NOT FOUND*.

2. Derive as null.

Note: On the CAS Details page, a English Level Attained value is mandatory for Upload Ready status if SELT Required is *Yes*.

SELT Listening Level

Upload Extract Data page: Evidence Details

XML Tag: <SELTListeningLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Listening Level

Derivation Steps:

1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Reading Level

Upload Extract Data page: Evidence Details

XML Tag: <SELTReadingLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Reading Level

Derivation Steps:

1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Speaking Level

Upload Extract Data page: Evidence Details

XML Tag: <SELTSpeakingLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Speaking Level

Derivation Steps:

1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Writing Level

Upload Extract Data page: Evidence Details

XML Tag: <SELTWritingLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	English Writing Level

Derivation Steps:

1. Derive short translate name of the value from the CAS Details record.
2. Derive as null.

SELT Test Provider

Upload Extract Data page: Evidence Details

XML Tag: <TestProvider>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Training Provider

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.

If a Message Number is found for the short translate value, derive as the message text. If the message is not in the message catalog (set number 14260), derive the field as *MESSAGE NOT FOUND*.

2. Derive as null.

Note: On the CAS Details page, a Training Provider value is mandatory for Upload Ready status if SELT Required is *Yes*.

Previous UK Study

Upload Extract Data page: Evidence Details

XML Tag: <PreviousUKStudy>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Previous UK Study

Derivation Steps:

1. Derive from the CAS Details record. Yes is derived as *true*, No is derived as *false*.

Previous Academic Level

Upload Extract Data page: Evidence Details

XML Tag: <PreviousAcademicLevel>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Previous Academic Level

Derivation Steps:

1. Derive as the short translate value from the CAS Details record.

If a Message Number is found for the short translate value, derive as the message text. If the message is not in the Message Catalog (set number 14260), derive the field as *MESSAGE NOT FOUND*.

2. Derive as null.

Note: On the CAS Details page, a Previous Academic Level value is mandatory for Upload Ready status if Previous UK Study is *Yes*.

Current Level Comparison

Upload Extract Data page: Evidence Details

XML Tag: <CurrentPreviousCourseLevelComparison>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Current Level Comparison

Derivation Steps:

1. Derive as the short translate value (upper case) from the CAS Details record.

If a Message Number is found for the short name, derive as the message text. If the message is not in the Message Catalog (set number 14260), derive the field as *MESSAGE NOT FOUND*.

2. Derive as null.

Note: On the CAS Details page, a Current Level Comparison value is mandatory for Upload Ready status if Previous UK Study is *Yes*.

Progression Justification

Upload Extract Data page: Evidence Details

XML Tag: <ProgressionJustification>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Progression Justification

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Note: On the CAS Details page, a Progression Justification value is mandatory for Upload Ready status if Current Level Comparison is *L* or *S*.

Accommodation Provided

Upload Extract Data page: Financial Details

XML Tag: <AccommodationProvided>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Accommodation Provided

Derivation Steps:

1. Derive from the CAS Details record.

Note: Yes is derived as *true*, No is derived as *false*.

Accommodation Fees Included

Upload Extract Data page: Financial Details

XML Tag: <CourseFeeIncludesAccommodationCosts>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Accommodation Fee Included

Derivation Steps:

1. Derive from the CAS Details record.

Note: Yes is derived as *true*, No is derived as *false*.

First Year Course Fees

Upload Extract Data page: Financial Details

XML Tag: <CourseFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	First Year Course Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as θ , if the First Year Course Fees is θ on the CAS Details page.

Course Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <CourseFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Course Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Accommodation Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <AccommodationFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Accommodation Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

First Year Boarding Fees

Upload Extract Data page: Financial Details

XML Tag: <BoardingFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	First Year Boarding Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as 0, if the First Year Boarding Fees is 0 on the CAS Details page.

Boarding Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <BoardingFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Boarding Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

ATAS Certificate Required

Upload Extract Data page: Certification

XML Tag: <CourseRequiresATAS>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	ATAS Certificate Required

Derivation Steps:

1. Derive from the CAS Details record.

Note: Yes is derived as *true*, No is derived as *false*.

Dean's Certificate Required

Upload Extract Data page: Certification

XML Tag: <PostgraduateDeanCertificateRequired>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Dean's Certificate Required

Derivation Steps:

1. Derive from the CAS Details record.

Note: Yes is derived as *true*, No is derived as *false*.

Offer Documents

Upload Extract Data page: Documentation

XML Tag: <DocumentsUsedToObtainOffer>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Offer Documents

Derivation Steps:

1. Derive from the CAS Details record.

Update Extract Fields

This section discusses how the Create Extract process derives the field values for the Update extract.

Update File ID

Update Extract Data page: Header

XML Tag: <BulkUpdateFileId>

Mandatory: Yes

Pages Used:

Page	Page Element
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Update File ID Override

Derivation Steps:

1. Derive from the Update File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_UPDATE_YYYY_MM_DD_nn* (for example, PSUNV_UPDATE_2009_09_27_01), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

CAS Number

Update Extract Data page: Header

XML Tag: <CASNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	CAS Number

Derivation Steps:

1. Derive from the CAS Details page.

First Year Course Fees

Update Extract Data page: Financial Details

XML Tag: <CourseFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	First Year Course Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as 0, if the First Year Course Fees is 0 on the CAS Details page.

Course Fees Paid

Update Extract Data page: Financial Details

XML Tag: <CourseFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Course Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note: An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Accommodation Fees Paid

Update Extract Data page: Financial Details

XML Tag: <AccommodationFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Accommodation Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note: An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Boarding Fees Paid

Update Extract Data page: Financial Details

XML Tag: <BoardingFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Boarding Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note: An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Report File Fields

This section discusses how the Create Extract process derives the field values for the Report extract.

Report File ID

Report Extract Data page: Header

XML Tag: <BulkReportingID>

Mandatory: Yes

Pages Used:

Page	Page Element
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Report File ID Override

Derivation Steps:

1. Derive from the Report File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_REPORT_YYYY_MM_DD_nn* (for example, PSUNV_REPORT_2009_09_27_01), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

CAS Number

Report Extract Data page: Header

XML Tag: <CASNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	CAS Number

Derivation Steps:

1. Derive from the CAS Details record.

Expected Enrollment Date

Report Extract Data page: Report Details

XML Tag: <ExpectedEnrollmentDate>

Mandatory: Yes

Pages Used:

Page	Page Element
Report Details (Student Admissions, PBI Processing, CAS Maintenance, Report Details)	Expected Enrollment

Derivation Steps:

1. Derive from the CAS Details record

Notes

Report Extract Data page: Report Details

XML Tag: <Notes>

Mandatory: No

Pages Used:

<i>Page</i>	<i>Page Element</i>
Report Details (Student Admissions, PBI Processing, CAS Maintenance, Report Details)	Notes

Derivation Steps:

1. Derive from the CAS Details record
2. Derive as *NULL ERROR*.

(NLD) Managing Studielink

Understanding Studielink

Documentation for setting up and managing Studielink is not available in Online Help. For Studielink documentation, see PeopleSoft Campus Solutions Selected PeopleBook Chapters for the Netherlands (NLD) in My Oracle Support (ID 2052493.1).

The documentation in My Oracle Support includes these topics:

- Setting up Studielink
- Receiving messages from Studielink
- Posting Studielink messages to application tables
- Reviewing and updating Studielink information
- Managing outbound messages
- Changing student status using Studielink

(NLD) Managing the BRON Interface

Understanding BRON

Documentation for setting up and managing BRON is not available in Online Help. For BRON documentation, see PeopleSoft Campus Solutions Selected PeopleBook Chapters for the Netherlands (NLD) in My Oracle Support (ID 2052493.1).

The documentation in My Oracle Support includes these topics:

- Setting up the BRON interface
- Setting up BO for BRON
- Setting up ED for BRON
- Setting up VAVO for BRON
- Setting up NT2 for BRON
- Setting up BRON prior education
- Setting up BRON enrollment end reason
- Setting up BRON funding reason
- Setting up BRON BO error messages
- Creating and sending the BRON file
- Reviewing the BRON file before sending
- Viewing BRON history by student
- Managing BRON return file processing
- Managing GBA data
- Managing BRON snapshot files

Evaluating Applicants

Understanding the Evaluating Applicants Business Process

This section lists prerequisites and discusses the evaluating applicants business process.

Prerequisites

Before you begin evaluating applicants, applications must be fully entered into your system. Depending on your office procedures, you will add evaluations at different times during the year. Although not all of the following information is required to run evaluations, the following list can serve as an overview of the relevant data that can be entered, and thus considered, for an application:

- Applicant demographics.
- Applicant address.
- Application program data.
- Application data.
- Application recruiting data.
- External education data.
- Test results.
- General materials.
- Application materials.
- Early financial aid offer information.

Evaluating Applicants Business Process

There are many ways you can use your system to evaluate applicants. Recruiting and Admissions provides SQR processes that enable you to automate much of your business process. You can also use Recruiting and Admissions to evaluate applicants manually. In fact, many combinations of manual and automated processes can work. Therefore, before evaluating applicants, decide how you want to use your system to evaluate applicants.

Regardless of whether you choose to evaluate applicants manually, through SQR processes, or through a combination of manual and automated processing, you must define rating schemes and the rating components that make up rating schemes. You must also define:

- Evaluation codes.

- Evaluation committees (if applicable to your evaluation business process).
- Evaluation status codes.

After you have set up the process for evaluating applicants, you are ready to perform the evaluations. This is where you have the most options regarding manual processing versus automatic processing. Performing applicant evaluations involves:

- Assigning evaluation codes to applicants.
- Linking materials (such as recommendations, essays, and portfolios) to applications.
- Assigning committees (which consist of the evaluators who physically evaluate the applicants).
- Entering evaluator ratings.
- Retrieving and evaluating objective ratings (such as test scores and GPA) from the applications.

After you have defined rating schemes, evaluation codes, committees, and evaluation statuses, you are ready to evaluate the applicants. Depending on the evaluation code/rating scheme structure that your institution uses, there are many ways to evaluate applicants. This book limits the discussion to the tools that you can use to fulfill your specific needs. These tools include:

- General evaluations and general evaluator ratings.
- Application evaluations and application evaluation ratings.
- An automated method for assigning evaluation components.
- An SQR process for linking application materials to applications.
- An SQR process for entering rating values.
- An SQR process for evaluating applicants based on rating values, and for updating application evaluation statuses.
- A COBOL process for calculating enrollment deposits.
- A COBOL process for activating applicants as students.

Use these tools to assign evaluation codes to applications, to enter and retrieve rating component values, to enter or have the system calculate overall rating values, to evaluate the applicant based on those overall rating values, and to update the applicant's program status.

Automatic Versus Manual Processing

The following table presents the steps that can be performed manually or automatically:

<i>Task</i>	<i>To execute automatically</i>	<i>To execute manually</i>
Assign evaluation codes.	Evaluation Code Assignment process ADEVALCD.SQR	General Evaluations component or Application Evaluations component.

Task	To execute automatically	To execute manually
Link application materials.	Application Materials Extract process ADMTEXT.SQR	Application Materials page.
Enter rating values for rating schemes and rating components.	For objective rating components: Evaluation Calculation process ADMTLRTG.SQR	For subjective rating components: General Evaluator Ratings component or Application Evaluator Ratings component.
Evaluate applicants based on rating values, and update application evaluation statuses.	Application Status Update ADMTLPGS.SQR	General Evaluations component or Application Evaluations component.
Calculate enrollment deposits.	When you update application evaluation statuses in batch: SFPBADEP (COBOL SQL)	Calculate Deposit Fees link on the Application Program Data page.
Activate applicants as students.	When you update application evaluation statuses in batch: ADPCPPRC (COBOL SQL)	Application Program Data page in the Application Maintenance component.

Your institution can rename the processes listed in the above table. You can also add to or edit the SQCs for the SQRs listed above. Check with your system administrator for more information about the specific SQRs and SQCs used by your institution.

General Versus Application Evaluations

To assign evaluation codes manually, you must create an evaluation for each applicant. There are two sets of components that you can use to create evaluations for an applicant.

- Use the General Evaluations and General Evaluator Ratings components to create *general* evaluations.

General evaluations are *not* tied to a career, program, or application number. Therefore, use general evaluations to evaluate applicants on general criteria that are not required by a particular career or program (such as a statement of purpose that the institution requires, regardless of the career or program the person is applying to). In addition, because general evaluations are not tied to application numbers, you can use general evaluations to evaluate individuals (such as prospects) without having to enter an application.

- Use the Application Evaluations and Application Evaluator Ratings components to create *application* evaluations.

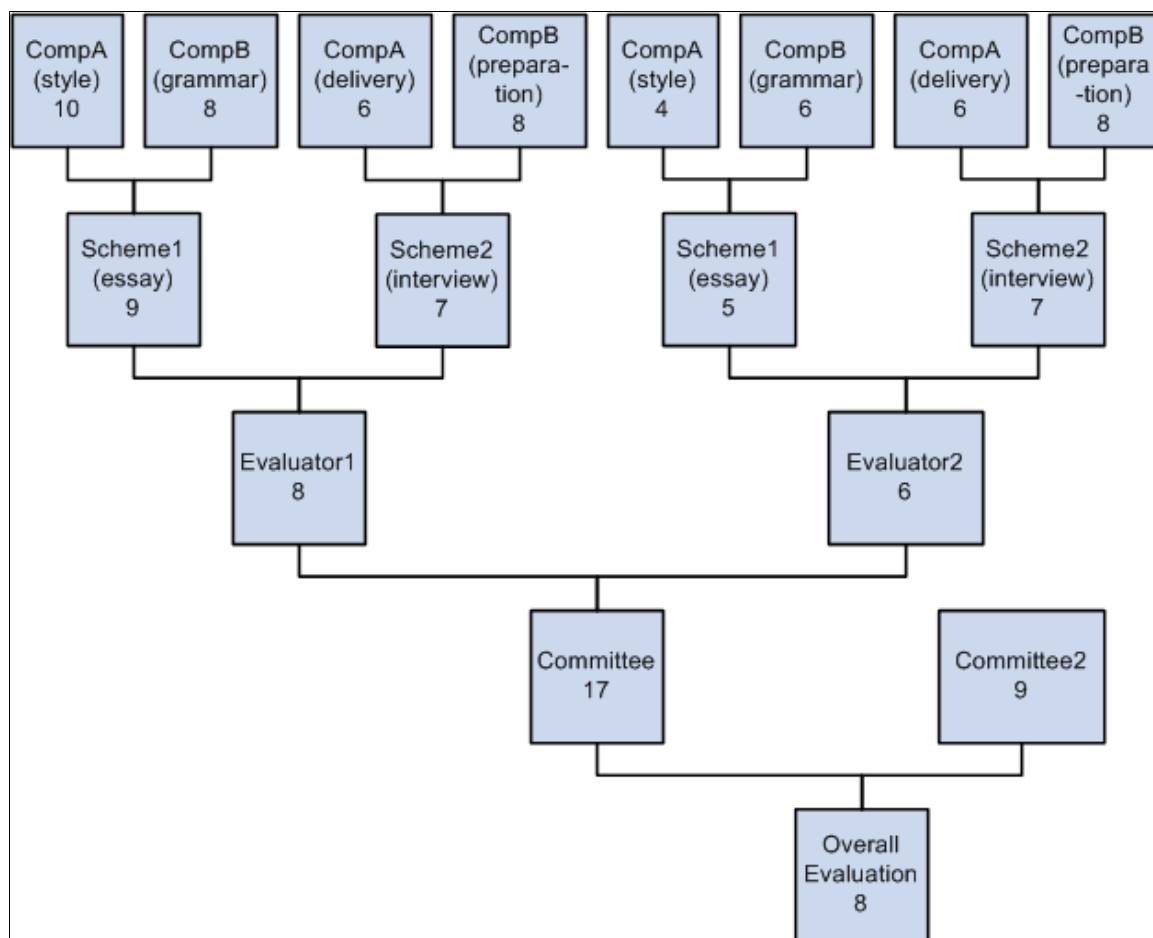
Application evaluations are tied to a career, program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the career and program to which they are applying.

You can evaluate an applicant using both of these sets of components if you desire. You also use these components to enter ratings. You can enter the ratings manually, or you can use the Application Evaluation process to retrieve and evaluate objective scores, and then enter rating values. If you enter ratings manually, you use the Application Evaluator Ratings or the General Evaluator Ratings page. If the Application Evaluation process retrieves the ratings, they appear on the Overall Ratings page in the Application Evaluation component.

Understanding Automatic Overall Rating Calculation

Your Recruiting and Admissions application is equipped with a background process that averages evaluator ratings and overall ratings. Therefore, you only have to manually enter rating values at the rating component level. The system averages those ratings and populates overall ratings at the next higher level. The system continues to average overall ratings until you have an overall rating for the application.

This chart illustrates the hierarchical structure of the background process that averages evaluator ratings and overall ratings.



You must first enter rating component rating values. The system then calculates the overall rating value for the scheme. After all of the overall rating values for the scheme have been calculated, the system calculates the overall rating value for the evaluator, and the process continues hierarchically.

For example, suppose you assigned two committees to evaluate an applicant. One committee is to evaluate essays and interviews, and the second committee is to evaluate other materials (for simplicity we will not look at the details of the second committee). The first committee consists of two committee members (or evaluators). Each evaluator evaluates two schemes: the undergraduate essay and the undergraduate interview. The evaluators evaluate the style and grammar components of the undergraduate essay scheme, and they evaluate the delivery and preparation components of the undergraduate interview scheme.

1. First, the evaluator enters ratings for each *component* in each scheme.

In the example in the diagram above, the first evaluator entered 10 for style and 8 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. The second evaluator entered 4 for style and 6 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. For the system to calculate the averages, you must enter values at this level first.

2. When the evaluators saved the pages, the system calculates the averages for each *scheme* and populates the Overall Rating fields on the General Evaluator Rating page or the Application Evaluator Rating page, depending on the type of evaluation.

In our example, the overall rating for the first scheme for Evaluator1 is 9 (the average of 10 and 8), and the overall rating for the second scheme for Evaluator1 is 7 (the average of 6 and 8). The overall rating for the first scheme for Evaluator2 is 5 (the average of 4 and 6), and the overall rating for the second scheme for Evaluator2 is 7 (the average of 6 and 8).

3. After each scheme has an overall rating value, the system populates the overall rating for the *evaluator* (after you save the page) and populates the Overall Rating field on the Evaluator Ratings page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

In our example, the overall rating for Evaluator1 is 8 (the average of 9 and 7), and the overall rating for Evaluator2 is 6 (the average of 5 and 7).

4. After each evaluator has an overall rating value, the system populates the overall rating for the *committee* (after you save the page) and populates the Overall Rating field on the Evaluation Committee page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

In our example, the overall rating for Committee1 is 7 (the average of 8 and 6), and suppose that the overall rating for Committee2 is 9.

5. After each committee has an overall rating value, the system populates the overall rating for the application (after you save the page) and populates the Overall Rating field on the General Evaluation or Application Evaluation page, depending on the type of evaluation.

In our example, the overall rating for the application is 8 (the average of 7 and 9).

Remember that you must start at the first step. If you manually enter overall ratings for a scheme, for instance, without entering components, you will break the chain and the system will not calculate averages at any level. In other words, the system only calculates overall ratings at any given level if it had calculated the overall ratings at every level below that one.

Creating General Evaluations

This section discusses how to:

- Assign an evaluation code to a general evaluation.
- Link general materials to a general evaluation.
- Assign a committee to a general evaluation.
- Assign evaluators to a general evaluation.

Pages Used to Create General Evaluations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Evaluation	GENL_EVAL1	<ul style="list-style-type: none"> • Student Recruiting > Evaluate Prospects > General Evaluations • Student Recruiting > Evaluate Prospects > Student Admissions > Application Evaluation > General Evaluations 	Assign evaluation codes and to enter high level, general information about a person. The evaluation code populates various fields in this component with default information (such as rating schemes and committees). You can also link general materials to an evaluation from this page.
Select General Materials	GENL_MATL_POPUP	Click the Link Materials link on the General Evaluation page.	Link general materials to a general evaluation.
View Assigned Materials	MATL_EVAL_POPUP	Click the appropriate Detail button on the Select General Materials page.	View details about a Material Type.
General Evaluation Committee	GENL_EVAL2	<ul style="list-style-type: none"> • Student Recruiting > Evaluate Prospects > General Evaluations > General Evaluation Committee • Student Admissions > Application Evaluation > General Evaluations > General Evaluation Committee 	Assign general evaluation committees to a general evaluation. The overall ratings of the committees you assign are also stored on this page.

Page Name	Definition Name	Navigation	Usage
General Evaluators	GENL_EVAL3	<ul style="list-style-type: none">• Student Recruiting > Evaluate Prospects > General Evaluations > General Evaluators• Student Admissions > Application Evaluation > General Evaluations > General Evaluators	Assign evaluators to a general evaluation, and to record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to a General Evaluation

Access the General Evaluation page (**Student Recruiting > Evaluate Prospects > General Evaluations**).

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

General EvaluationGeneral Evaluation CommitteeGeneral Evaluators

Sandra KimAA0012

Find | View AllFirst1 of 1Last

*Eval Code:UGINTERWWUndergraduate Interviews

*Eval Nbr:1

Link Materials

EvaluationRating

Eval Stat:Committee

Scheme:UGINTERWW

Eval Dt:10/07/2004

Overall Rating:

Comment:

Transfer To:General Materials

Go

Field or Control	Description
Eval Code (evaluation code)	Select the evaluation code to be used to evaluate this person. Other fields on this page (such as Scheme) populate according to the evaluation code you select. This is where you assign evaluation codes to evaluations manually. Define evaluation codes on the Evaluation Table page.

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Field or Control	Description
Eval Nbr (evaluation number)	The evaluation number default is 1 for the first general evaluation you enter, 2 for the second, and continues incrementally.
Eval Stat (evaluation status)	Select the current evaluation status of this general evaluation. Define evaluation status codes on the Evaluation Status Table page.
Eval Dt (evaluation date)	The default for the evaluation date is your system date.
Scheme	Select the rating scheme you want to use for this general evaluation. If the evaluation code entered on this page is linked to a committee rating ID scheme, that scheme appears automatically. Define rating schemes on the Rating Scheme Table page.
Overall Rating	<p>If you are using rating schemes, and if you entered all the evaluator ratings for every committee linked to this person, this value appears automatically. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each committee are stored on the General Evaluation Committee page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate prospects and applicants, you can enter an overall rating manually.</p> <p>See Evaluating Applicants Business Process.</p> <hr/> <p>Note: This value does not include rating values that were retrieved and calculated by the Evaluation Calculation process.</p> <hr/>
Link Materials	Click this link to link general materials to this general evaluation. This link is available only after you save the page, provided there are general materials stored for this person. You can only choose from the general materials that are linked to this person. The Select General Materials Page appears.
View Materials	Click this link to view the general materials that are linked to this general evaluation. This link is available after you save the page, provided that you have linked materials to this general evaluation on the Select General Materials page. The View Assigned Materials Page appears.
Go	Click to go to another component.

Linking General Materials to a General Evaluation

Access the Select General Materials page (Click the Link Materials link on the General Evaluation page).

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

Select General Materials

Kim, Sandra D ID: AA0012

Find | View All First 1-2 of 2 Last

Material Group	Material Type	Matl Nbr	Date Recvd	Dt Record	Type
<input type="checkbox"/> Graduate Auditions	Audition	2	10/07/2004	10/07/2004	Drama
<input checked="" type="checkbox"/> Graduate Recommendations	Recommendation	1	10/07/2004	10/07/2004	

Field or Control	Description
Material Type	Select the material type that you want to link to this evaluation.

Assigning a Committee to a General Evaluation

Access the General Evaluation Committee page (**Student Recruiting > Evaluate Prospects > General Evaluations > General Evaluation Committee** or **Student Admissions > Application Evaluation > General Evaluations > General Evaluation Committee**).

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

General Evaluation **General Evaluation Committee** General Evaluators

Sandra Kim AA0012

Find | View All First 1 of 1 Last

Eval Code: UGINTERVW Undergraduate Interviews

Eval Nbr: 1

Find | View All First 1 of 1 Last

Description: Undergraduate Interviews

*Committee: UGINWW UG Interview Committee

Evaluation Status: Committee Evaluation Date: 10/07/2004

Overall Rating:

Comment:

Transfer To: General Materials Go

Field or Control	Description
Committee	<p>The system populates the committee if the evaluation code for this general evaluation has an evaluation committee assigned to it. You can add committees.</p> <hr/> <p>Note: To create general evaluations, you must assign an evaluation committee. However, an evaluation committee can be made up of only one person.</p> <hr/>
Evaluation Status	Select the evaluation status reflecting the current status of this committee's evaluation. Define evaluation status codes on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is the system date.
Overall Rating	The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator in this committee assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applicants, you can enter an overall rating manually.

Related Links

[Understanding the Evaluating Applicants Business Process](#)

Assigning Evaluators to a General Evaluation

Access the General Evaluators page (**Student Recruiting > Evaluate Prospects > General Evaluations > General Evaluators** or **Student Admissions > Application Evaluation > General Evaluations > General Evaluators**).

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

General Evaluation
General Evaluation Committee
General Evaluators

Sandra Kim
AA0012

Find | View All
First 1 of 1 Last

Eval Code: UGINTERVW Undergraduate Interviews
Eval Nbr: 1

Find | View All
First 1 of 1 Last

Committee: UGINVW UG Interview Committee

Find | View All
First 1 of 2 Last

*Evaluator ID: AD1040 Sullivan, Irving
Committee Role: MMBR Administrator of Committee
Evaluation Status: Committee Evaluation Date: 10/07/2004
Overall Rating:
Comment:

Transfer To: General Materials Go

Field or Control	Description
Evaluator ID	<p>Enter an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the General Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.</p> <p>Note: You cannot enter evaluators under an evaluation code unless you have first entered a committee on the General Evaluation Committee page.</p>
Committee Role	Enter the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.
Evaluation Status	Select the evaluation status reflecting the current status of this evaluator's evaluation. You set up evaluation status codes on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is your system date.

<i>Field or Control</i>	<i>Description</i>
Overall Rating	The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the General Evaluator Rating page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applicants or prospects, you can enter an overall rating manually.

Related Links

[Evaluating Applicants Business Process](#)

Entering and Updating General Evaluator Ratings

Use the General Evaluator Ratings component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applicants based on rating schemes.

This section discusses how to:

- Enter and update general evaluator overall ratings.
- Enter and update general evaluator ratings of rating components.

Pages Used to Enter and Update General Evaluator Ratings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Evaluator Rating	GENL_RATING1	<ul style="list-style-type: none"> • Student Recruiting > Evaluate Prospects > General Evaluator Rating • Student Admissions > Application Evaluation > General Evaluator Rating 	<p>Enter general evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.)</p> <p>You have to first set up an applicant evaluation based on an evaluation code in the General Evaluations component.</p>

Page Name	Definition Name	Navigation	Usage
General Evaluator Detail	GENL_RATING2	<ul style="list-style-type: none"> • Student Recruiting > Evaluate Prospects > General Evaluator Rating > General Evaluator Detail • Student Admissions > Application Evaluation > General Evaluator Rating > General Evaluator Detail 	<p>Enter an evaluator's ratings of the components for a rating scheme. The system averages and displays the ratings entered here on the General Evaluator Rating page.</p> <p>You must first complete the General Evaluator Rating page.</p>

Entering and Updating General Evaluator Overall Ratings

Access the General Evaluator Rating page (**Student Recruiting > Evaluate Prospects > General Evaluator Rating** or **Student Admissions > Application Evaluation > General Evaluator Rating**).

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

The screenshot shows the 'General Evaluator Rating' page for Sandra Kim (AA0012). The page has two tabs: 'General Evaluator Rating' (active) and 'General Evaluator Detail'. The main content area displays evaluation details for 'UGINTERWW Undergraduate Interviews' with 'Eval Nbr: 1' and 'Committee: UGINWW UG Interview Committee'. Below this, there is a section for 'Evaluator ID: AD1040 Sullivan, Irving'. The evaluation details include: '*Scheme: UGINTERWW Undergraduate Interviews', 'Evaluation Status: Committee', 'Evaluation Date: 10/07/2004', 'Overall Rating: ' (empty field), and 'Comments: ' (empty text area). At the bottom, there is a 'Transfer To: General Materials' dropdown and a 'Go' button.

Field or Control	Description
Scheme	The system populates the rating scheme according to the rating scheme entered on the General Evaluation page for this evaluation code and for this person. You can add more than one rating scheme for an evaluator.

Field or Control	Description
Evaluation Status	Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is your system date.
Overall Rating	The system automatically calculates the overall rating based on the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the General Evaluator Detail page. You can override this calculation.

Entering and Updating General Evaluator Ratings of Rating Components

Access the General Evaluator Detail page (**Student Recruiting > Evaluate Prospects > General Evaluator Rating > General Evaluator Detail** or **Student Admissions > Application Evaluation > General Evaluator Rating > General Evaluator Detail**).


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


General Evaluator Rating

General Evaluator Detail

Sandra Kim

AA0012





Eval Code:

UGINTERWW

Undergraduate Interviews

Eval Nbr:

1

Committee:

UGINWW

UG Interview Committee

Find | View All

First

1 of 2

Last

Evaluator ID:

AD1040

Sullivan,Irving

Find | View All

First

1 of 1

Last

Scheme:

UGINTERWW

Undergraduate Interviews

Find | View All

First

1 of 3

Last

*Component:

ACADP

Academic Potential

Type:

INDV

Individual

Rating Value:

5

Excellent

Comments:

Transfer To:

General Materials

Go

Field or Control	Description
Component and Type	The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types.
Rating Value	<p>Enter a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.</p> <p>When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the General Evaluator Rating page. You must enter ratings on <i>this</i> page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.</p>

Creating Application Evaluations

Use the Application Evaluations component to create *application* evaluations. Application evaluations are tied to an academic career, academic program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the academic career and program that they are applying to.

Use this component to record subjective rating values (such as a rating given by a committee) and objective rating values (such as a test score). If you are using the Automatic Evaluation process to retrieve objective rating values from applications, those rating values appear on the Overall Rating page in this component.

After creating the application evaluation, use the Application Evaluator Ratings component to enter actual evaluator rating values. However, if you are not using rating schemes, you can manually enter overall ratings in the General Evaluations component.

This section discusses how to:

- Assign an evaluation code to an application.
- Enter overall component ratings for an application.
- Assign a committee to an application evaluation.
- Assign evaluators to an application evaluation.

Pages Used to Create Application Evaluations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Evaluation	ADM_EVAL1	Student Admissions > Application Evaluation > Application Evaluation	Assign evaluation codes and to enter high level, general information about an applicant. The evaluation code populates various fields in this component with default information (such as rating schemes and committees).
Overall Rating	ADM_OVERALL_RATING	Student Admissions > Application Evaluation > Application Evaluation > Overall Rating	Manually enter or edit overall rating information for an application evaluation. The Overall Rating page stores objective overall rating information for an application evaluation. Rating values for a rating scheme's components are stored on this page for an application evaluation. Because it is unnecessary for each committee member to evaluate objective information (such as a test score), you can store objective rating values for each application in one place. You can enter the rating values manually, or you can use the Evaluation Calculation process to determine the values.
Committee Rating	ADM_EVAL2	Student Admissions > Application Evaluation > Application Evaluation > Committee Rating	Assign application evaluation committees to an application evaluation. The overall ratings of the committees you assign are also stored on this page.
Evaluator Rating	ADM_EVAL3	Student Admissions > Application Evaluation > Application Evaluation > Evaluator Rating	Assign evaluators to an application evaluation, and record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to an Application

Access the Application Evaluation page (**Student Admissions > Application Evaluation > Application Evaluation**).

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

Application Evaluation		Overall Rating	Committee Rating	Evaluator Rating
Kelly Harris		ID	AD9201	
Academic Career: Undergraduate		Application Nbr:	00024159	
Prog Nbr: 0		Academic Program:	Liberal Arts Undergraduate	
Find View All First 1 of 1 Last				
*Evaluation Code:	UGAPPLFYR	UG Applicants		
*Evaluation Nbr:	1	<input type="checkbox"/> Recalculate Evaluation		
Evaluation		Rating		
Eval Stat:	Progress	Committee Rating ID:	UGCOMMFYR	
Eval Dt:	10/25/2004	Overall Rating ID:	ADMAVG	
Comment:				
Transfer To:	Application Evaluator Ratings	Go		

Field or Control	Description
Evaluation Code	Enter an evaluation code to be used to evaluate this applicant. Evaluation codes are set up on the Evaluation Table page. This is where you assign evaluation codes to evaluations manually. Evaluation codes can also be assigned automatically using the evaluation code assignment process. See Assigning Evaluation Codes to Applications in Batch .
Evaluation Nbr (number)	The evaluation number automatically populates as 1 for the first application evaluation you enter, 2 for the second, and continues incrementally.
Eval Stat (evaluation status)	Select the evaluation status reflecting the current status of this application evaluation. Define evaluation status codes on the Evaluation Status Table page.
Eval Dt (evaluation date)	The default evaluation date is your system date. Edit the date.

Field or Control	Description
Committee Rating ID	The committee rating ID automatically appears if the evaluation code was defined with a committee rating ID. A committee rating ID is a rating scheme with a type equal to <i>Committee</i> . Such schemes evaluate subjective information about an application. If you only want to evaluate objective data, select an overall rating ID only. You can change the committee rating ID.
Overall Rating ID	The overall rating ID automatically appears if the evaluation code was defined with an overall rating ID. An overall rating ID is a rating scheme with a type equal to <i>Overall</i> . Such rating schemes evaluate objective information about an application. If you only want to evaluate subjective data, enter a committee rating ID only. You can change the overall rating ID.
Recalculation Evaluation	The system selects this check box if application materials were linked to this application—either manually or through the application materials extract process (ADMTEXT.SQR)—after the application status update process processed this application. This tells the system that even though this application has already gone through the application status update process, it needs to go through it again.
Go	Click to go to another component.

Entering Overall Component Ratings for an Application

Access the Overall Rating page (**Student Admissions > Application Evaluation > Application Evaluation > Overall Rating**).

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

Application Evaluation		Overall Rating		Committee Rating		Evaluator Rating	
Kelly Harris		ID		AD9201			
Academic Career: Undergraduate		Application Nbr:		00024159			
Prog Nbr: 0		Academic Program:		Liberal Arts Undergraduate			
<input type="checkbox"/> New Course		<input type="checkbox"/> New Summary		<input type="checkbox"/> New General Material			
<input type="checkbox"/> New Subject		<input type="checkbox"/> New Test Score		<input type="checkbox"/> Automatic Update Process			
Find View All First 1 of 1 Last							
Evaluation Code:		UGAPPLFYR		UG Applicants			
Evaluation Nbr:		1					
Rating Component		Rating Value		Final Value		Evaluated	
AVG Admissions Average		0.0000		<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Transfer To:		Application Evaluator Ratings		Go			

Field or Control	Description
New Course, New Subject, New Summary, New Test Score, and New General Material	If a new course, subject, academic summary, test score, or general material is added to this person's record, the system automatically selects their respective check boxes. These check boxes cannot be manually selected.
Automatic Update Process	The system selects this check box if one of the other choices in this group box is selected. When this check box is selected, it lets the automatic update process know that this application needs to be considered for processing when you run the application materials extract process. The system automatically sets these flags if a new transcript, test score, or general material is added for the employee ID.
Rating Component	The rating components of the rating scheme that you entered in the Overall Rating ID field on the Application Evaluation page appear. You can add new rating components.
Rating Value	If you are manually rating these components, enter the rating values for each component that you want to award this application. The Evaluation Calculation process will calculate these values if you are automatically rating these components.
Final Value	The system selects this check box if the rating component was defined as a final value component. Final value components are those that are required to be filled before the Evaluation Calculation process processes this application.

Field or Control	Description
Evaluated	The system selects this check box if a rating component was evaluated through the Evaluation Calculation process. If you are manually evaluating this component, select this check box after evaluating the component.
Go	Click to go to another component.

Assigning a Committee to an Application Evaluation

Access the Committee Rating page (**Student Admissions > Application Evaluation > Application Evaluation > Committee Rating**).

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

Application Evaluation		Overall Rating		Committee Rating		Evaluator Rating	
Kelly Harris		ID		AD9201			
Academic Career:		Undergraduate		Application Nbr:		00024159	
Prog Nbr:		0		Academic Program:		Liberal Arts Undergraduate	
<div>Find View All First 1 of 1 Last</div>							
Evaluation Code:		UGAPPLFYR		UG Applicants			
Evaluation Nbr:		1					
<div>Find View All First 1 of 1 Last</div>							
*Committee:		UGEV01		UG Admissions Committee			
Committee Type:		UG Admissions Committee					
Evaluation Status:				Evaluation Date:			
Overall Rating:							
Comment:							
Transfer To:		Application Evaluator Ratings		Go			

Field or Control	Description
Committee	The system populates the committee if the evaluation code for this application evaluation has an evaluation committee assigned to it. You can add committees.
Committee Type	The type of the committee that you select appears.

Field or Control	Description
Evaluation Status	Select the evaluation status reflecting the current status of this committee's evaluation. The evaluation code assignment process enters the evaluation status when you assign evaluation codes automatically. Define evaluation status codes on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is the system date. The evaluation code assignment process enters the evaluation date when you assign evaluation codes automatically.
Overall Rating	The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.
Go	Click to go to another component.

Assigning Evaluators to an Application Evaluation

Access the Evaluator Rating page (**Student Admissions > Application Evaluation > Application Evaluation > Evaluator Rating**).

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

Application Evaluation		Overall Rating		Committee Rating		Evaluator Rating	
Kelly Harris		ID		AD9201			
Academic Career: Undergraduate		Application Nbr:		00024159			
Prog Nbr: 0		Academic Program:		Liberal Arts Undergraduate			
Find View All First 1 of 1 Last							
Evaluation Code: UGAPPLFYR		UG Applicants					
Evaluation Nbr: 1		Find View All First 1 of 1 Last					
Committee: UGEV01		UG Admissions Committee					
Find View All First 1 of 2 Last							
*Evaluator ID:		AD1040		Sullivan, Irving			
Committee Role:		STAF		Staff member of Committee			
Evaluation Status:				Evaluation Date:			
Overall Rating:							
Comment:							
Transfer To: Application Evaluator Ratings Go							

Field or Control	Description
Evaluator ID	<p>Enter an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the Application Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.</p> <p>Note: You cannot enter evaluators under an evaluation code unless you have first entered a committee on the Committee Rating page.</p>
Committee Role	Enter the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.
Evaluation Status	Select the evaluation status reflecting the current status of this evaluator's evaluation. Evaluation status codes are set up on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is your system date.

<i>Field or Control</i>	<i>Description</i>
Overall Rating	The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the Application Evaluator Rating page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings for an Application

Use the Application Evaluator Rating component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applications based on rating schemes.

This section discusses how to:

- Enter and update evaluator overall ratings for an application evaluation.
- Enter and update evaluator ratings of individual rating components.

Pages Used to Enter and Update Evaluator Ratings for an Application

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Evaluator Rating	ADM_RATING1	Student Admissions > Application Evaluation > Evaluate Application Materials > Application Evaluator Ratings	Enter evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.)
Application Evaluator Detail	ADM_RATING2	Student Admissions > Application Evaluation > Evaluate Application Materials > Application Evaluator Ratings > Application Evaluator Detail	Enter an evaluator's ratings of the components of a rating scheme. The system then averages and displays these ratings on the Application Evaluator Rating page.

Entering and Updating Evaluator Overall Ratings for an Application Evaluation

Access the Application Evaluator Rating page (**Student Admissions > Application Evaluation > Evaluate Application Materials > Application Evaluator Ratings**).

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

Application Evaluator Rating | **Application Evaluator Detail**

Janis Richards ID AD1008

Academic Career: Undergraduate **Application Nbr:** 00022603

Prog Nbr: 0 **Academic Program:** Liberal Arts Undergraduate

Evaluation Code: UG Appl **Evaluation Nbr:** 1

Committee: UG Admissions Committee

Evaluator ID: AD1040

***Scheme:** UGCOMMFYR UG Application Committee

Evaluation Status: Final **Evaluation Date:** 09/22/2000

Overall Rating: 3.67

Comments:

Transfer To: Application Evaluations **Go**

Field or Control	Description
Scheme	The system populates the rating scheme according to the rating scheme entered on the Application Evaluation page for this evaluation code (for this person). You can add more than one rating scheme for an evaluator.
Evaluation Status	Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is your system date.
Overall Rating	The system automatically calculates the overall rating by averaging the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the Application Evaluator Detail page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings of Individual Rating Components

Access the Application Evaluator Detail page (**Student Admissions** > **Application Evaluation** > **Evaluate Application Materials** > **Application Evaluator Ratings** > **Application Evaluator Detail**).

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

Application Evaluator Rating

Application Evaluator Detail

Janis Richards

ID

AD1008

Academic Career:

Undergraduate

Application Nbr:

00022603

Prog Nbr:

0

Academic Program:

Liberal Arts Undergraduate

Evaluation Code:

UG Appl

Evaluation Nbr:

1

Committee:

UG Admissions Committee

Find | View All

First

1 of 2

Last

Evaluator ID:

AD1040

Find | View All

First

1 of 1

Last

Scheme:

UGCOMMFYR

UG Application Committee

Find | View All

First

1 of 3

Last

*Component:

ESSAY

Essay(s)

Type:

INDV

Individual

Rating Value:

4

Good

Comments:

Transfer To:

Application Evaluations

Go

Field or Control	Description
Component and Type	The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types.
Rating Value	<p>Enter a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.</p> <p>When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the Application Evaluator Rating page. You must enter ratings on <i>this</i> page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.</p>

Evaluating Applicants Using Automatic Processing

Understanding How to Evaluate Applicants Using Automatic Processing

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*.

Recruiting and Admissions provides the following automatic processes to aid in evaluating applicants:

- Mass Change and the Assign Evaluation Codes process (ADEVALCD.SQR).

Assigns evaluation codes to applications in batch. Evaluation codes contain default data required for evaluating applicants (such as the rating scheme and evaluation status).

- Extract data for Adm Appl Matl (extract data for admissions application materials) process (ADMTLEXT.SQR).

Assigns application materials to applications in batch. Application materials are used to evaluate applications.

- Assign Adm Applicant Rating (assign admissions applicant rating) process (ADMTLRTG.SQR).

Retrieves objective scores (such as test scores) and evaluates them based on rules that you define in your own SQCs. Then, the process populates rating values on the Overall Rating page in the Application Evaluation component. Rating values are used to evaluate applicants.

- Program Stack Update process (ADMTLPGS.SQR).

Checks to see that all of the rating components have been entered, then sums all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values. Finally, updates the application evaluation status based on the rules in your SQCs.

- Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process (SFPBADEP).

Calculates enrollment deposits in batch on applications on which you've run the Program Stack Update process.

- Activate Applications process (ADPCPPRC).

Matriculates applicants in batch who were evaluated using the Program Stack Update process.

Note: PeopleSoft delivers sample SQRs to help you with a variety of tasks. However, your institution can modify these SQRs to fit their specific needs. For this reason, your SQRs might be named differently, and they might behave slightly differently than described.

Related Links

[Understanding the Evaluating Applicants Business Process](#)

Assigning Evaluation Codes to Applications in Batch

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*.

Before you can run the application materials extract process or an evaluation calculation for a group of applications, you must assign them an evaluation code. Evaluation codes contain important default information and helps with selecting the appropriate group for extract and evaluation processing.

First you must select the applications that you want to assign the evaluation codes to. Use the Mass Change feature to do this. Then run the Assign Evaluation Codes process to assign the evaluation codes to the applications that the mass change process selected.

To access the Mass Change Definition component, select **Student Admissions > Processing Applications > Mass Change > Mass Change Definition**.

See product documentation for *PeopleTools: Data Management*

To assign evaluation codes with mass change:

1. Select the appropriate mass change definition to define which applications need to be assigned which evaluation code.

Use the Mass Change Definition - Description page to enter the mass change definition that defines the criteria by which you select applications. The delivered mass change definition for assigning evaluation codes is *Evaluation Assignment Select*. However, your institution can define its own mass change definition for assigning evaluation codes, but use the delivered mass change definition as a template.

2. Enter criteria for determining which applications to assign the evaluation code, and enter the evaluation code you want assigned to those applications.

Use the Criteria and Defaults page to enter criteria for determining which applications to assign the evaluation code, and to enter the evaluation code you want assigned to those applications.

The first execution sequence of the SQL statement in the delivered mass change definition is *Delete Tmp5 Table*. This program clears the temporary table that stores the records of those applications selected the last time you ran this process.

The second execution sequence of the SQL statement in the delivered mass change definition is *Select Applicant Criteria*. The following page shot shows an example of the criteria that can be used in the selection process.

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

Mass Change Definition: Application Prog Update Select

SQL Statement Find | View All First 1 of 1 Last

Execution Seq: 1 **Description:** Select Applicant Criteria

Criteria Find | View All First 1-2 of 20 Last

Field	Field Value
Academic Level Equal To	10
Academic Career Equal To	UGRD

Defaults Customize | Find | View All First 1-2 of 2 Last

Field Label	Mass Change Field Value
1 Program Action	COND
2 Action Reason	TEST

Use the **Criteria** group box to enter the criteria by which the mass change process will select applications to assign the evaluation code you select. In the delivered Evaluation Assignment Select mass change definition, there are 27 fields you can use to select applicants (such as academic level, academic career, program status, recruiter ID, and many others). In our example in the previous page shot, the applicant must have an academic level of *10* and must be an undergraduate. However, there could be many more fields selected as search criteria in subsequent rows.

Use the **Defaults** group box to select the evaluation code that you want the mass change process to assign to the applications that you selected. In the example in the previous page shot, the evaluation code the mass change process will assign is *UGAPPLFYR* (first year undergraduate applicants).

1. Generate the SQL for this mass change definition.

Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition.

Remember to click the Clear SQL button if an SQL statement already exists in the text box.

2. Set up a mass change group to define in what order you want the mass change definitions to run.

Use the Mass Change Group component to set up mass change groups. To access the Mass Change Group component select **Student Admissions > Processing Applications > Mass Change > Mass Change Group**. Create a mass change group to group the steps that it takes to process the applications you selected. Create a group by entering related mass change definitions that you must run to complete a particular task (such as assigning evaluation codes), and the order in which they should be run.

On the Mass Change Group page, select *SA* (student administration) in the PS Owner field.

Next, select the mass change definitions. In the previous example, you would run the *Evaluation Assignment Select* mass change definition first. This definition selects all the records chosen by the SQL statement that you generated earlier. Second, you would run the *Evaluation Duplicate Check* mass change definition, which removes any applicants who matched your selection criteria, but were already assigned the evaluation code.

3. Process the mass change group to select the applications to be assigned the evaluation code.

Use the Run Mass Change page to execute the mass change definitions in the mass change group. The mass change definitions in this group choose your final list of applications that should be assigned a code during the evaluation code assignment process. To access this page select Student Admissions, Processing Applications, Mass Change, Run Mass Change.

On the Run Mass Change page, select the Execute Mass Change Group option. Then select the mass change group ID that you defined on the Mass Change Group page.

4. Run the Evaluation Code Assignment process (discussed in the following section).

Page Used to Assign Evaluation Codes to Applications in Batch

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Evaluation Code Assignment	RUNCTL_EVALCODE	Student Admissions > Processing Applications > Evaluations > Assign Evaluation Codes	<p>Assign the evaluation code to the applications that you selected through the mass change process.</p> <hr/> <p>Note: PeopleSoft delivers a sample SQR for assigning evaluation codes, ADEVALCD.SQR. Your institution can modify this SQR to fit its specific needs.</p>

Running the Evaluation Code Assignment Process

Access the Evaluation Code Assignment page (**Student Admissions > Processing Applications > Evaluations > Assign Evaluation Codes**).

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

Assign Evaluation Codes

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

*Academic Institution: PSUNV PeopleSoft University

Program Evaluation Status

*Evaluation Status:

*Evaluation Date: 10/26/2004

Evaluation Code Status

*Evaluation Status:

*Evaluation Date: 10/26/2004

Committee Evaluation Status

*Evaluation Status:

*Evaluation Date: 10/26/2004

Program Evaluation Status

Field or Control	Description
Evaluation Status and Evaluation Date	Enter the evaluation status and date that you want entered on the Evaluation subpage of the Application Program Data page. Define evaluation statuses on the Evaluation Status Table page.

Evaluation Code Status

Field or Control	Description
Evaluation Status and Evaluation Date	Enter the evaluation status and date that you want entered on the Application Evaluation page. Define evaluation statuses on the Evaluation Status Table page.

Committee Evaluation Status

<i>Field or Control</i>	<i>Description</i>
Evaluation Status and Evaluation Date	Enter the evaluation status and date that you want entered on the Committee Rating and Evaluator Rating pages. Define evaluation statuses on the Evaluation Status Table page.

Click the **Run** button to run the Assign Evaluation Codes process at user-defined intervals.

Linking Application Materials to Applications in Batch

This section discusses how to link application materials to applications in batch.

Page Used to Link Application Materials to Applications in Batch

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Materials Extract	RUNCTL_APPEVAL1	Student Admissions > Processing Applications > Evaluations > Application Materials Extract	Assign application materials to applications in batch. Application materials are used to evaluate applicants. Note: PeopleSoft delivers a sample SQR for extracting application materials, ADMTLEXT. Your institution can add to or edit the SQCs for this SQR.

Linking Application Materials to Applications in Batch

For an application to be considered during the application materials extract process, the application must have an evaluation code assigned on the Application Evaluation page, and the **Automatic Update Process** check box must be selected on the Overall Rating page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, which must have material extract SQCs defined for it. The Application Materials Extract process uses those SQCs to assign the appropriate materials to the selected applications. Define rating schemes and their material extracts on the Rating Scheme Table page.

<i>Field or Control</i>	<i>Description</i>
Evaluation Code	Select an evaluation code. The process only extracts application materials for applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.

Field or Control	Description
Admit Term	Select an admit term. The process only extracts application materials for applications with the admit term that you select. Define admit terms on the Term Values Table page.
Evaluation Status	Select an evaluation status. The process only extracts application materials for applications with the evaluation status that you select. The process looks at the Evaluation Status field on the Application Program Data page.
Institution	Select an Academic Institution. The process only extracts application materials for applications for the institution you select.

Click the **Run** button to run the Extract data for Adm Appl Matl (extract data for admissions application materials) process at user-defined intervals.

To view the results of this extract process, use the Application Materials Summary pages under Student Admissions, Applicant Summaries.

Calculating Rating Values Through an Automatic Process

The section discusses how to calculate rating values through an automatic process.

Page Used to Calculate Rating Values Through an Automatic Process

Page Name	Definition Name	Navigation	Usage
Evaluation Calculation	RUNCTL_APPEVAL2	Student Admissions > Processing Applications > Evaluations > Evaluation Calculation	Run the evaluation calculation.

Calculating Rating Values Through an Automatic Process

Access the Evaluation Calculation page (**Student Admissions > Processing Applications > Evaluations > Evaluation Calculation**).

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

Evaluation Calculation

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

*Academic Institution: PeopleSoft University

*Evaluation Code: UG Applicants

*Admit Term: 2005 Fall

Update Evaluation Code Status

From:	<input type="text" value="CM"/>	Committee Eval In Progress
To:	<input type="text" value="FN"/>	Final

The application must first be assigned an evaluation code on the Application Evaluation page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, and the rating scheme must have rating components assigned to it. Each rating component in the rating scheme has a defined sequence and formula ID. The formula ID defines which SQC should be run for the rating component. The evaluation calculation looks to those components to come up with rating values that will be inserted on the Overall Rating page for the application. Application materials must have been assigned manually or automatically.

The Evaluation Calculation process looks for applications that meet the criteria you enter here which have never been calculated or which were previously calculated, but have had materials linked to the application after the last calculation was run. If new materials have been added since the last calculation, the system selects the **Recalculate Evaluation** check box on the Application Evaluation page.

When the Evaluation Calculation process finds an application that meets its criteria, it retrieves the values that your SQCs tell it to retrieve, evaluates the values based on the rules in your SQC, and populates the result on the Overall Rating page in the Application Evaluation component. For example, suppose you determine that an SAT score of over 1450 is worth a rating value of 10. Suppose further that you run the process and it retrieves an SAT score of 1462. The process would evaluate based on your rules and populate the rating value *10* in the **Rating Value** field for the test score component.

Note: PeopleSoft delivers a sample SQR for evaluating applications, ADMTLRTG. Your institution must define its own SQCs for this SQR, which define the rules by which applications should be evaluated.

Field or Control	Description
Evaluation Code	Select an evaluation code. The process only evaluates applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.

Field or Control	Description
Admit Term	Enter an admit term. The process only evaluates applications that have the admit term you select. Define admit terms on the Term Values Table page.
Institution	Enter an institution. The process only evaluates applications for this institution.
From	The process only evaluates applications that have the evaluation status you select. This is the evaluation status listed on the Application Evaluation page.
To	Enter the evaluation status that you want the process to <i>add</i> to the application evaluations.

Click the **Run** button to run the Assign Adm Applicant Rating (assign admissions applicant rating) process at user-defined intervals.

Automatically Updating Application Program Evaluation Statuses

Use the Application Status Update process to automatically update the program evaluation status of multiple applications.

This process looks to the parameters you define to choose the applications to be considered for the status update. The program looks to the Overall Rating page to verify that all rating components designated as final value have been evaluated. The program then determines if any of these applications have a future dated row on the Application Program Data page. Any records with a future dated row are *not* included in this process.

The next step in the process is to sum all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values.

For each application evaluated, the Application Program Data page is updated as follows:

- The process updates the program evaluation status.
- The process inserts a new program data row with an effective date equal to your system date, or, if the most recent row has the same effective date as the current date, the sequence number is incremented.

The new row contains the same data as the previous row, with the following exceptions: program action, action date and program status, which the process updates. The action reason is also updated if you have defined for it to do so in your SQC.

The values the process inserts are determined by the rules of the SQCs that your institution defines.

When you update application program data via the Application Status Update process, you're unable to manually calculate enrollment deposits or activate applicants as students. Therefore, you must calculate

enrollment deposits and activate applicants as students via two COBOL processes: the Calculate Deposits process and the Activating Applications process.

This section discusses how to:

- Updating application program evaluation status using the Program Stack Update process.
- Calculating enrollment deposits using the Deposit Fees Calc (Batch) process.
- Activating applicants as students using the Activate Applications process.

Pages Used to Automatically Update Application Program Evaluation Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Status Update	RUNCTL_EVALSTATUS	Student Admissions > Processing Applications > Update Applications > Application Status Update	<p>Perform a background process to update the program evaluation status and program actions of applications that have been evaluated.</p> <p>See Understanding How to Evaluate Applicants Using Automatic Processing</p> <hr/> <p>Note: PeopleSoft delivers a sample SQR, ADMTLPGS.SQR. Your institution can add to or edit the SQCs for this SQR.</p> <hr/>
Calculate Deposits	RUNCTL_SFPBADEP	Student Admissions > Application Fees and Deposits > App Deposit Fees Process	<p>Calculate enrollment deposits for applicants who were admitted via the Application Status Update process. You must calculate an enrollment deposit before activating the applicant as a student if you have a deposit fee code assigned to your application center (on the Application Center Table page).</p> <p>You must first admit applicants through the Program Stack Update process.</p>

Page Name	Definition Name	Navigation	Usage
Activate Application	RUNCTL_AD_SR	Student Admissions > Processing Applications > Update Applications > Activate Applicants	<p>Activate applicants as students. This process inserts a program action of Matriculate (MATR) on the Application Program Data page and creates the student program and plan records.</p> <p>Use the Activate Applications process if you admitted an applicant through the Program Stack Update process, and therefore could not manually matriculate the applicant.</p> <p>If your institution requires an enrollment deposit prior to matriculation, you must calculate a deposit prior to running this process.</p>

Updating Application Program Evaluation Status Using the Program Stack Update Process

Access the Application Status Update page (**Student Admissions** > **Processing Applications** > **Update Applications** > **Application Status Update**).

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

Application Status Update

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

*Academic Institution: PSUNV PeopleSoft University

*Evaluation Code: UGAPPLFYR UG Applicants

*Academic Career: UGRD Undergraduate

*Academic Program: LAU Liberal Arts Undergraduate

*Admit Type: FYR First-Year

*Admit Term: 0550 2005 Fall

*Action Date: 10/01/2004

Update Program Eval Status

From: IP To: FN

Field or Control	Description
Evaluation Code	Enter an evaluation code. The process only processes the applications that have the evaluation code that you select. Define evaluation codes on the Evaluation Table page.
Academic Career	Enter an academic career. The process only processes the applications that have the academic career that you select. This is the academic career to which that the applicant is applying.
Academic Program	Enter an academic program. The process only processes the applications that have the academic program that you select.
Admit Type	Enter an admit type. The process only processes applications that have the admit type that you select. Define admit types on the Admit Type Table.
Admit Term	Enter an admit term. The process only processes the applications that have the admit term that you select. Define admit terms on the Term Values Table page.
Action Date	The default for the action date is your system date. Edit this date to reflect the date you want to appear as the action date on the Application Program Data page.
From	The process only process applications that have the evaluation status you select.
To	Enter the program evaluation status that you want the process to <i>add</i> to the applications on the Application Program Data page.

Click the **Run** button to run the Program Stack Update process at user-defined intervals.

To view the results of this application program evaluation status update process, you can use the Applicant Progression page, or you can go to an individual's Application Program Data page in the Application Maintenance component.

Calculating Enrollment Deposits Using the Deposit Fees Calc (Batch) Process

Access the Calculate Deposits page (**Student Admissions > Application Fees and Deposits > App Deposit Fees Process**).

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

Calculate Deposits

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

Parameters

Batch ID: 999999999999

*Institution: PSUNV PeopleSoft University

Academic Career	Admit Term	Admit Type
UGRD Undergrad	0550 2005 Fall	FYR First-Year

[Display Deposit Fees](#)

Field or Control	Description
Academic Career	Enter an academic career. The process only calculates enrollment deposits for applications that have the academic career that you select.
Admit Term	Enter an admit term. The process only calculates enrollment deposits for applications that have the admit term that you select. Define admit terms on the Term Values Table page.
Admit Type	Enter an admit type. The process only calculates enrollment deposits for applications that have the admit type that you select. Define admit types on the Admit Type Table page.

You can add additional rows as needed for selecting additional careers, admit terms etc. to calculate deposits for multiple groups of applicants. Click the **Run** button to run the Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process at user-defined intervals.

To view the results of the Deposit Fees Calc (Batch) process for applicants, use the Display Deposit Fees link on the Run Control page or the Review Batch Deposit Fees page.

Activating Applicants as Students Using the Activate Applications Process

Access the Activate Application page (**Student Admissions > Processing Applications > Update Applications > Activate Applicants**).

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

Activate Applicants

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

Find | View All

First 1 of 1 Last

Institution	*Career	Acad Prog	Admit Term	Admit Type	*As Of Date
PSUNV	UGRD	LAU	0550	FYR	10/26/2004

First-Year

+

-

Note: Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Field or Control	Description
Career	Enter an academic career. The process only matriculates applicants who have the academic career that you select.
Acad Program (academic program)	Enter an academic program. The process only matriculates applicants who have the academic program that you select.
Admit Term	Enter an admit term. The process only matriculates applicants who have the admit term that you select. Define admit terms on the Term Values Table page.
Admit Type	Enter an admit type. The process only matriculates applicants who have the admit type that you select. Define admit types on the Admit Type Table page.
As of Date	The default for the as of date is your system date. This is the date you ran this process.

Add additional rows as needed to define additional selection criteria. Click the **Run** button to run the Activate Applications process at user-defined intervals.

Viewing Application Evaluation Summaries and Progression

Viewing Application Evaluation Summaries

Use the Application Evaluation Summary pages to view the status of application evaluations.

This section discusses how to:

- View overall results of an application evaluation.
- View committee results of an application evaluation.
- View evaluator results of an application evaluation.
- View evaluator detail summary information for an application evaluation.

Pages Used to View Application Evaluation Summaries

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Overall Results	ADM_EVAL_SUMM	Student Admissions > Applicant Summaries > Application Evaluation Summary > Overall Results	Look up overall results of an application evaluation for an applicant. You must first complete the application evaluation for this person.
Committee Results	ADM_EVAL_COMM_SUMM	Student Admissions > Applicant Summaries > Application Evaluation Summary > Committee Results	Look up results of committee application evaluations for an applicant.
Evaluator Results	ADM_EVALUATOR_SUMM	Student Admissions > Applicant Summaries > Application Evaluation Summary > Evaluator Results	Look up results of evaluators' evaluations of an application.

Page Name	Definition Name	Navigation	Usage
Evaluator Detail	ADM_EVAL_DTL_SUM	Student Admissions > Applicant Summaries > Application Evaluation Summary > Evaluator Detail	Look up results of the details of evaluators' evaluations of an application. You must first complete the application evaluation for this person.

Viewing Overall Results of an Application Evaluation

Access the Overall Results page (**Student Admissions > Applicant Summaries > Application Evaluation Summary > Overall Results**).

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

Overall Results Committee Results Evaluator Results Evaluator Detail								
Dario Miselli		ID		AD6999				
Academic Career: Undergraduate		Application Nbr:		00024160				
Prog Nbr: 0		Academic Program:		Liberal Arts Undergraduate				
<div> <div> Search On </div> <div> <div> Component: <input type="text"/> </div> <div> Evaluation Code: <input type="text"/> </div> <div> <input type="button" value="Search"/> </div> </div> <div> <div> Final Value: <input type="text"/> </div> <div> Eval Stat: <input type="text"/> </div> </div> </div>								
<div> Sort By </div> <div> <input checked="" type="radio"/> Component <input type="radio"/> Final Value <input type="radio"/> Method <input type="radio"/> Rating Value </div>								
Evaluation Code	Nbr	Eval Stat	Date	Scheme	Component	Value	Final	Method
UG Applicants	1	Final	10/01/2004	UG App Com	Overall	93.3500	<input checked="" type="checkbox"/>	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Acad Perf	5.0000	<input type="checkbox"/>	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	High ACT		<input type="checkbox"/>	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Curriculum	5.0000	<input type="checkbox"/>	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	High SAT I	1400.0000	<input type="checkbox"/>	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Subjective	3.6700	<input type="checkbox"/>	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Testing	5.0000	<input type="checkbox"/>	Automatic

Field or Control	Description
Component	Enter a rating component If you want to view summary information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.
Final Value	Select <i>Yes</i> if you want to view summary information for final value components only. Select <i>No</i> if you do not want to view only final value components.

Field or Control	Description
Evaluation Code	Enter an evaluation code if you want to view summary information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.
Eval Stat (evaluation status)	Select an evaluation status if you want to view summary information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Application Evaluation page.
Sort By	Select whether you want to view the results by Component , Final Value , Evaluation Method , or Rating Value .
Search	Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Committee Results of an Application Evaluation

Access the Committee Results page (**Student Admissions > Applicant Summaries > Application Evaluation Summary > Committee Results**).

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

Overall Results		Committee Results		Evaluator Results		Evaluator Detail	
Dario Miselli		ID		AD6999			
Academic Career: Undergraduate		Application Nbr:		00024160			
Prog Nbr: 0		Academic Program:		Liberal Arts Undergraduate			
<div> <div> Search On </div> <div> <div> Committee: <input type="text"/> </div> <div> Evaluation Code: <input type="text"/> </div> <div> <input type="button" value="Search"/> </div> </div> <div> Eval Stat: <input type="text"/> </div> </div>							
<div> Sort By </div> <div> <input checked="" type="radio"/> Committee <input type="radio"/> Rating <input type="radio"/> Eval Stat </div>							
<u>Committee</u>	<u>Eval Code</u>	<u>Nbr</u>	<u>Eval Stat</u>	<u>Date</u>	<u>Our Rating</u>		
UG Admissions Committee	UG Applicants	1	Final	10/01/2004	3.67		

Field or Control	Description
Committee	Enter an evaluation committee If you want to view committee information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Field or Control	Description
Evaluation Code	Enter an evaluation code if you want to view committee information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.
Eval Stat (evaluation status)	Select an evaluation status if you want to view committee information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Committee Evaluation page.
Committee, Rating, and Eval Stat (evaluation status)	Select whether you want to view the results of your summary information by committee, rating, or evaluation status.
Search	Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Results of an Application Evaluation

Access the Evaluator Results page (**Student Admissions > Applicant Summaries > Application Evaluation Summary > Evaluator Results**).

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

Overall Results		Committee Results		Evaluator Results		Evaluator Detail	
Dario Miselli		ID		AD6999			
Academic Career: Undergraduate		Application Nbr:		00024160			
Prog Nbr: 0		Academic Program:		Liberal Arts Undergraduate			
<div> <div> Search On </div> <div> <div> Committee: <input type="text"/> </div> <div> Evaluation Code: <input type="text"/> </div> <div> Evaluator: <input type="text"/> </div> <div> Eval Stat: <input type="text"/> </div> <div> <input type="button" value="Search"/> </div> </div> </div> <div> Sort By <ul style="list-style-type: none"> <input checked="" type="radio"/> Committee <input type="radio"/> Evaluator <input type="radio"/> Rating <input type="radio"/> Eval Stat </div>							
Evaluator Name	Committee	Evaluation Code	Nbr	Eval Stat	Date	Ovr Rating	
Sullivan, Irving	UG Admissions Committee	UG Applicants	1	Progress	10/01/2004	3.67	
Dern, Bill	UG Admissions Committee	UG Applicants	1	Progress	10/01/2004	3.67	

Field or Control	Description
Committee	Enter an evaluation committee If you want to view evaluator result information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Field or Control	Description
Evaluation Code	Enter an evaluation code if you want to view evaluator result information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.
Evaluator	Enter an evaluator if you want to view evaluator result information for a specific evaluator.
Eval Stat (evaluation status)	Select an evaluation status if you want to view evaluator result information by this criterion. When you click the Search button the system retrieves evaluator result information for those evaluations that have matching evaluation statuses on the Evaluator Rating page.
Committee, EvaluatorRating, and Eval Stat (evaluation status)	Select whether you want to view the results of your summary information by committee, evaluator, rating, or evaluation status.
Search	Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Detail Summary Information for an Application Evaluation

Access the Evaluator Detail page (**Student Admissions > Applicant Summaries > Application Evaluation Summary > Evaluator Detail**).

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

Overall Results Committee Results Evaluator Results Evaluator Detail						
Dario Miselli		ID		AD6999		
Academic Career: Undergraduate		Application Nbr:		00024160		
Prog Nbr: 0		Academic Program:		Liberal Arts Undergraduate		
Search On Committee: <input type="text"/> Evaluation Code: <input type="text"/> Component: <input type="text"/> Evaluator: <input type="text"/>				Search <input type="button" value="Search"/>		
				Sort By <input checked="" type="radio"/> Committee <input type="radio"/> Component <input type="radio"/> Evaluator <input type="radio"/> Rating Value		
<u>Evaluator Name</u>	<u>Committee</u>	<u>Evaluation Code</u>	<u>Nbr</u>	<u>Scheme</u>	<u>Component</u>	<u>Value</u>
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	5
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	3
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	4
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	4
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3

Field or Control	Description
Committee	Enter an evaluation committee If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.
Evaluation Code	Enter an evaluation code if you want to view evaluator detail information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.
Component	Enter a rating component If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.
Eval Stat (evaluation status)	Enter an evaluation status if you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves evaluator detail information for those evaluations that have matching evaluation statuses on the Application Evaluator Detail page.
Committee, Component, Evaluator, and Rating Value	Select whether you want to view the results of your summary information by committee, component, evaluator or rating value.
Search	Click this button to bring up the evaluator detail information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing a Summary of an Applicant's Progression

This section discusses how to view a summary of an applicant's progression.

Page Used to View a Summary of an Applicant's Progression

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Applicant Progression	APPL_PROGRESS_SUMM	Student Admissions > Applicant Summaries > Applicant Progression	<p>View a summary of an applicant's progression through the recruiting and admissions business process. Summary data (such as status and program action) can be viewed for the person as a prospect, applicant, and student. You can also view any file attachments submitted by the applicant.</p> <p>Individuals must have an application in your database for you to be able to view their progression.</p>

(NLD) Managing BPV Internship Agreements

Understanding BPV Internship Agreements

Students pursuing vocational education receive theoretical as well as practical education. As part of their practical training students participate in internships at external organizations. These internships are known as vocational training, or BPV (Beroepspraktijkvorming). The BPV agreement between the student, the external organization, and the institution is laid out in a contract which must be printed and signed by various persons.

Setting Up BPV Internship Agreements

To set up BPV internship agreements, use the Organization Type component (SAD_BPV_OTP_NLD), Address Types component (SAD_ADDRESS_TP_NLD), Campus Telephone component (SAD_CAMPUS_TEL_NLD), BPV Appendix component (SAD_BPV_NBL_NLD), and the BPV User Settings component (SAD_BPV_OID_NLD).

This section discusses how to:

- Set up BPV user security.
- Define role user with BPV administrator rights.

Pages Used to Set Up BPV Internship Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
BPV Organization Type	SAD_BPV_OTP_NLD	Student Admissions > Internship Contracts NLD > Organization Types > BPV Organization Type	Define organization types by academic organization. You can only enter types for organizations for which you have access. Organization types are used to classify organization locations on the BPV Organization Locations page.

Page Name	Definition Name	Navigation	Usage
Address Types	SAD_ADDRESS_TP_NLD	Student Admissions > Internship Contracts NLD > Address Types > Address Types	Define address and phone types for organizations. Specify address types for organizations on the Location Detail page and specify phone types on the BPV Organization Phones page.
BPV Campus Telephone	SAD_CAMPUS_TEL_NLD	Student Admissions > Internship Contracts NLD > Campus Telephone Numbers > BPV Campus Telephone	Define campus telephone numbers. Campus telephone numbers are printed on top of the BPV contract.
BPV Appendix	SAD_BPV_NBL_NLD	Student Admissions > Internship Contracts NLD > BPV Appendix > BPV Appendix	Create standard appendix texts that can be linked to BPVOs. The standard texts must be secured by academic organization security and must be set up per CREBO code. Link appendix text to contracts on the BPV Appendix page.
BPV User Settings	SAD_BPV_OID_NLD	Student Admissions > Internship Contracts NLD > BPV User Settings > BPV User Settings	Set up BPV user security to allow users to work with BPV contract functionality.
BPV Set-up	SAD_BPV_INST_NLD	Student Admissions > Internship Contracts NLD > BPV Set-up > BPV Set-up	Define a role user with BPV administrator rights and set up last contract number assigned

Setting Up BPV User Security

Access the BPV User Settings page (**Student Admissions > Internship Contracts NLD > BPV User Settings > BPV User Settings**).

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

BPV User Settings

User ID: HBN KU0023 Finnes,Richie

☐ BBL Match

☒ BOL match

<i>Field or Control</i>	<i>Description</i>
BBL Match	Select this check box if this user can link students in the BBL career only to a contract with the same CREBO. Clear this check box if the user can link students in the BBL career to contracts regardless of CREBO.
BOL Match	Select this check box if this user can link students in the BOL career only to a contract with the same CREBO. Clear this check box if the user can link students in the BOL career to contracts regardless of CREBO.


Defining Role User with BPV Administrator Rights

Access the BPV Set-up page (**Student Admissions > Internship Contracts NLD > BPV Set-up > BPV Set-up**).

This example illustrates the fields and controls on the BPV Set-up page. You can find definitions for the fields and controls later on this page.

BPV Set-up

Assign Roleuser with BPV Creation Date Edit Permissions & administer Last BPV Assigned Contract Number

Role User: 

Last Contract Number Assigned:

<i>Field or Control</i>	<i>Description</i>
Role User	Select a role user that should have BPV Administrator rights. The BPV Administrator can change the student career number value and BPV creation date on BPV Contracts.

Field or Control	Description
Last Contract Number Assigned	Use this field to maintain the last BPV contract number assigned.

Defining BPV Organization Locations

This section discusses how to:

- Define BPV organization locations.
- Review or update BPV organization locations.
- Define accreditation information for BPV organizations.

Pages Used to Define BPV Organization Locations

Page Name	Definition Name	Navigation	Usage
Location Detail	ORG_LOCATIONS	<ul style="list-style-type: none"> • Student Admissions > Internship Contracts NLD > Organization Locations > Location Detail • Campus Community > Organization > Create/ Maintain Organization > Organization Locations > Location Detail 	Add a BPV organization location.
BPV Organization Locations	SAD_BPV_OLC_NLD	<ul style="list-style-type: none"> • Student Admissions > Internship Contracts NLD > BPV Locations > BPV Organization Locations • Click the Edit BPV Location Address link on the Location Detail Page. 	Review or update the locations for BPV organizations that you added on the Location Details page.
BPV Accreditation	SAD_BPV_ACC_NLD	Student Admissions > Internship Contracts NLD > BPV Locations > BPV Accreditation	Define accreditation information for BPV organization locations.

Page Name	Definition Name	Navigation	Usage
BPV Location Notes	SAD_BPV_LNT_NLD	Student Admissions > Internship Contracts NLD > BPV Locations > BPV Location Notes	Enter notes for BPV organization locations.

Defining BPV Organization Locations

Access the Location Detail page (**Student Admissions > Internship Contracts NLD > Organization Locations > Location Detail**).

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

Location Summary

Location Detail

Org ID: SABPV001

BPV Organization

Primary Location: 1

Location 1

Location

Find First 2 of 2 Last

Location: 2

Location History

Find View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: location 2

Short Desc: location 2

Country: NLD Netherlands

Address: location 2
Location ave 2 2
1002 AA Amsterdam

Edit Address

Edit BPV Location Address

Electronic Addresses

Email ID: location2@bpv.nl

URL Address: www.location2.nl

EDI Address:

Location Phones

Customize Find View All First 1-2 of 2 Last

Phone Type	Prefix	Phone	Extension	Preferred		
Business	NLD	0900 070808		<input type="checkbox"/>	+	-
Mobile	NLD	0900 070808		<input type="checkbox"/>	+	-

Last Update Date/Time:

by:

Click the **Edit BPV Location Address** link to access the BPV Organization Locations page and review or update the locations for BPV organizations that you add on this page. The **Edit BPV Location Address** link appears only if you select the **Use Dutch Functionality** option on the SA Features page.

Reviewing or Updating BPV Organization Locations

Access the BPV Organization Locations page (**Student Admissions > Internship Contracts NLD > BPV Locations > BPV Organization Locations**).

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

The screenshot displays the 'BPV Organization Locations' page. At the top, there are three tabs: 'BPV Organization Locations' (selected), 'BPV Accreditation', and 'BPV Location Notes'. Below the tabs, the 'Org ID' is 'SABPV001' and the 'BPV Organization' is 'BPV Organization'. The 'Primary Location' is '1' and 'Location 1'. There are icons for phone, calendar, and chat. The 'Organization Address' section shows 'Location: 2', 'Country: Netherlands', and 'Address: location 2, Location ave 2 2, 1002 AA Amsterdam'. Below this, there are input fields for 'Organization type' and 'AR number'. The 'Address Type' section shows 'BUSN' and 'Main address' (checked). The 'Effective Date' is '01/01/1900' and 'Country' is 'NLD' (Netherlands). The 'Status' is 'Active' and the 'Address' is 'location 2, Location ave 2 2, 1002 AA Amsterdam'. There is an 'Edit Address' link and a 'Copy Default Location Address' button.

Note: You cannot use this page to add a BPV organization location. To add a BPV organization location, use the Location Detail page (discussed in the previous section).

Field or Control	Description
Organization type	Select an organization type for this location. Organization types are defined on the BPV Organization Type page.

Field or Control	Description
AR number (account receivable number)	Enter the account receivable number of the location.
Address Type	Enter the address type for this location. Define address types on the Address Types page.
Main address	Select the primary address for this location.
Copy Default Location Address	Click to copy the address from the Location Detail page. When you click the button, the address appears on the address type row. The button appears only if you select an address type.

To administer phone numbers, access the Location Detail page (**Student Admissions > Internship Contracts NLD > Organization Locations > Location Detail**). To add or update BPV contacts, access the Contact Detail page (**Student Admissions > Internship Contracts NLD > Organization Contacts > Contact Detail**).

Defining Accreditation Information for BPV Organizations

Access the BPV Accreditation page (**Student Admissions > Internship Contracts NLD > BPV Locations > BPV Accreditation**).

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

Field or Control	Description
Knowledge centre id	Enter the knowledge center or external organization at this location for which to select accreditation.

Field or Control	Description
External contract	Enter the number of the external contract that has been generated and distributed by the knowledge center to the BPV organization. This is for information only.
HEGIS Code	Enter the CREBO code for which the accreditation applies. Only the HEGIS codes that belong to the knowledge center and are secured through the link between HEGIS code and academic program appear in the prompt.
Appr by nat org	Enter the accreditation status of this organization for this CREBO code. Your options are <i>Accredited</i> , <i>In Cons</i> (in consideration), and <i>Not Accr</i> (not accredited). When you select the Accredited check box when creating a contract on the BPV Contract page, only CREBO codes that are identified as accredited here are available.
Start Date and End Date	Enter the start and end dates of the accreditation.

Setting Up BPV Contacts

This section discusses how to:

- Define BPV organization contacts.
- Define BPV contact persons.
- Define BPV contact person locations.

Pages Used to Set Up BPV Contacts

Page Name	Definition Name	Navigation	Usage
Contact Detail	ORG_CONTACTS	Student Admissions > Internship Contracts NLD > Organization Contacts > Contact Detail	Add contact information for BPV usage.
BPV Contact Person	SAD_BPV_OCN_NLD	Student Admissions > Internship Contracts NLD > BPV Contact Persons > BPV Contact Person	Define BPV contact persons.

Page Name	Definition Name	Navigation	Usage
Contact Person Locations	SAD_BPV_OCL_NLD	Student Admissions > Internship Contracts NLD > BPV Contact Persons > Contact Person Locations	Define locations for the contact person.
Contact Person Notes	SAD_BPV_OCN_NT_NLD	Student Admissions > Internship Contracts NLD > BPV Contact Persons > Contact Person Notes	Enter comments about the contact person.

Defining BPV Organization Contacts

Access the Contact Detail page (**Student Admissions > Internship Contracts NLD > Organization Contacts > Contact Detail**).

This example illustrates the fields and controls on the Contact Detail page.

Contact Summary

Contact Detail

Org ID: SABPV001

BPV Organization

Primary Contact: 1

Bill

Title:

Contact

Find First 1 of 2 Last

Contact: 1

Contact History

Find View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

ID:

Edit BPV Contact Details

*Contact Name: Bill

Job Title:

Contact Type: PRE President

Department:

Add Department

Contact Address

Address:

☐ Department
 ☐ Location
 ☐ Address Type
 ☒ None

1

Add Location

Electronic Addresses

Email ID: bill@bpv.nl

URL Address:

Contact Phones

Customize Find View All First 1 of 1 Last

*Phone Type	Prefix	Phone	Extension	Preferred		
				<input type="checkbox"/>	+	-

Last Update Date/Time: by:

Defining BPV Contact Persons

Access the BPV Contact Person page (**Student Admissions > Internship Contracts NLD > BPV Contact Persons > BPV Contact Person**).

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




BPV Contact Person

Contact Person Locations

Contact Person Notes

Org ID: SABPV001

BPV Organization



Primary Contact: 1

Bill

Title:

Contact Details

Find | View All

First 1 of 2 Last

Contact Nbr: 1

ID:

Status: Active

Contact Name: Bill

First Name: Bill

Name Initials: B

Gender: Male

Job Title:

Contact Type: PRE President

Email Address: bill@bpv.nl

Note: You cannot use the BPV Contact Persons component to add contacts. Use the component to add BPV specific details for contacts that you added using the Organization Contacts, Contact Detail page.

Field or Control	Description
Contact Nbr	<p>Contacts that appear on this page are active organization contacts. Contact Nbr, ID, Contact Name, Job Title, Contact Type, and Email Address values appear by default from the Organization Contacts, Contact Detail page.</p> <p>Assign contacts to specific BPV locations on the Contact Person Locations page.</p>

Defining BPV Contact Person Locations

Access the Contact Person Locations page (**Student Admissions > Internship Contracts NLD > BPV Contact Persons > Contact Person Locations**).

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

<i>Field or Control</i>	<i>Description</i>
Location Nbr (location number)	You must assign at least one location to contacts.

Creating Internship Contracts

This section discusses how to:

- Create BPV contracts.
- Attach appendixes to BPV contracts.

Pages Used to Create Internship Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
BPV Contract	SAD_BPV_CTR_NLD	Student Admissions > Internship Contracts NLD > BPV Contracts > BPV Contract	Create a BPV contract.
BPV Location Detail	SAD_BPV_OLC_SP_NLD	Click the Location Nbr button on the BPV Contract page.	View remarks about the BPV location.
BPV Appendix	SAD_BPV_C_BIJL_NLD	Student Admissions > Internship Contracts NLD > BPV Contracts > BPV Appendix	Attach appendixes to the BPV contract, or manually enter appendix text.

Creating BPV Contracts

Access the BPV Contract page (**Student Admissions > Internship Contracts NLD > BPV Contracts > BPV Contract**).

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

BPV Contract

BPV Appendix

External Org ID: SABPV001

BPV Internship Organization

Location Nbr: 1

Location 1

☒ Accredited

Delete

'HEGIS Code: 10039

Administrative Employee

Outsourcing company: SABPVKC1

BPV Knowledger centre

Outsourcing location: 1

KC Location

Internal contract: 0010003

External contract: EXTCON1245799

'Description: Internship for Administrative Employee students

'Start Date: 01/01/2000

'End Date: 01/01/2020

Mailing location: 1

Location 1

Instructor ID: AA0002

Acosta,Paul

Contact Nbr:

Contact nbr 2:

Contract length in weeks: 12

Number of hours per week: 16

Maximum Nbr of Students: 45

Total nbr of BPV Hours: 192

Plan

☐ BOL
☐ BBL
☒ All

Field or Control	Description
Accredited	Select to limit the values in the HEGIS Code field to CREBO codes for which this location is accredited. Select Accreditation on the BPV Accreditation page.
Location Nbr (location number)	Select a BPV organization location. Define organization locations on the BPV Organization Locations page.
Location Nbr (location number)	Click this button to view location notes for this location. Define location notes on the BPV Location Notes page.
HEGIS Code	Select a CREBO code for this contract. Only those CREBO codes for which you are authorized to create contracts is available.

Field or Control	Description
Outsourcing company	Select the outsourcing company for this contract. Define outsourcing companies on the External Organization Table page. If you enter an outsourcing company you must enter a location for it.
Outsourcing loc (outsourcing location)	Enter a location number for the outsourcing company.
Internal contract	When you save the page, the system assigns a number for this contract by adding 1 to the highest number found in the Contract table.
External contract	Enter the external contract number, if applicable.
Start Date and End Date	Enter the start and end dates of this contract. The start and end dates of the contract must fall within the start and end date of the OWO, if the OWO exists.
Mailing location	Enter the location number that will be used for correspondence. Locations are defined on the BPV Organization Location page.
Instructor ID	Select the practicum tutor of the institution. Define instructors on the Instructor/Advisor Table page.
Contact Nbr (contact number)	Select the contact number for the contact at the internship provider. Define contacts for this location on the BPV Contact Person page. Only contacts for this location appear as options.
Contact nbr 2	Select a second contact. Only contacts for this location appear as options.
Contract length in weeks	<p>Enter the number of weeks the contract will last.</p> <p>If you enter values in the Start Date and End Date fields, the system automatically calculates and displays a value in the Contract length in weeks field. Alternatively, you can enter a value directly in the Contract length in weeks field.</p> <p>When you enter values in the Start Date and End Date fields, the system uses the following formula to calculate the Contract length in weeks value:</p> $N \text{ (number of weeks) } = (\text{end date} - \text{start date}) / 7$ $X \text{ (number of weeks after deduction of full years) } = \max(40, N \bmod 52)$ $Y \text{ (number of full years) } = \text{Int}(N / 52) * 40$ $\text{Contract length in weeks} = X + Y$

Field or Control	Description
Number of hours per week	Enter the number of hours per week of this contract.
Maximum Nbr of Students (maximum number of students)	Enter the maximum number of students that can be linked to this contract.
Total nbr of BPV Hours (total number of BPV hours)	<p>If values are entered in the Contract length in weeks and Number of hours per week fields, the system automatically calculates and displays a value in the Total nbr of BPV Hours field and the Total nbr of BPV Hours field becomes unavailable for edit.</p> <p>Alternatively, you can enter a value directly in the Total nbr of BPV Hours field. If you enter a value in the Total nbr of BPV Hours field, the system disables the Contract length in weeks and Number of Hours per week fields.</p>
Plan	Indicate whether this contract is valid for <i>BOL</i> , <i>BBL</i> , or <i>Both</i> .
Delete	Click this button to delete this contract. You can only delete contracts that have no students linked to them.

Attaching Appendixes to BPV Contracts

Access the BPV Appendix page (**Student Admissions > Internship Contracts NLD > BPV Contracts > BPV Appendix**).

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

BPV Contract


BPV Appendix

External Org ID: SABPV001 BPV Internship Organization

Location Nbr: 1 Location 1

HEGIS Code: 10629 Agriculture

Internal contract: NEW

Appendix document:  Add Appendix

Field or Control	Description
Appendix document	Select the appendix document that you want attached to this contract. Create appendixes on the BPV Appendix page. This field becomes unavailable when the contract is printed.
Add Appendix	Click to add the selected appendix to the contract. You can manually add text to the appendix in the text box. The text box becomes unavailable when the contract is printed.

Adding Students to Contracts

This section discusses how to:

- Match students to contracts.
- Add students to contracts.
- Update a student's contract details.
- Update a student's appendix information.

Pages Used to Add Students to Contracts

Page Name	Definition Name	Navigation	Usage
Match Contracts	SAD_BPV_MATCH_NLD	Student Admissions > Internship Contracts NLD > BPV Match Contracts > Match Contracts	After you have created contracts on the BPV Contracts page, search for and select contracts to match students to the contracts.
Match Contracts - Vacancy	SAD_BPV_CTR_DL_NLD	Click the Detail Panel button on the Match Contracts page.	Select students to add to the contract.
Match Contracts - BPV Vacancy Detail	SAD_BPV_CTR_D3_NLD	Click the Detail Panel button on the Match Contracts - Vacancy page or the Match Students page.	Update contract details for the student.
Match Contracts - BPV Appendix Detail	SAD_BPV_CTR_D2_NLD	Click the Appendix button on the Match Contracts - BPV Vacancy Detail page.	Update BPV appendix information for the student'.

Matching Students to Contracts

Access the Match Contracts page (**Student Admissions > Internship Contracts NLD > BPV Match Contracts > Match Contracts**).

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

Match Contracts

Select

HEGIS Code: 10629

Agriculture

Deselect

Org ID:

Organization type:

☐ Open Only

Selected BPV Locations										Customize	Find	View All	First	1 of 1	Last
	External Org ID	Description	Internal contract	Description	Plan	Start Date	End Date	Max	Open Seats	Detail Panel					
1	SABPV001	Location 1	0010002	Whatever	Both	09/01/2001	12/31/2001	2	2						

Field or Control	Description
HEGIS Code	Select a CREBO code (stored in the HEGIS table) to select contracts for the CREBO code you select.
Org ID (organization ID)	Select an organization ID to limit contracts by organization.
Organization type	Select an organization type to limit contracts by organization type.
Open Only	Select this check box to retrieve only contracts that have vacancies.
Select	Click this button to search for contracts based on the criteria you enter.
Deselect	Click this button to clear the page.
Detail Panel	Click this button to select a contract to which to add students. The Match Contracts - Vacancy page appears, with which you can add students.

Adding Students to Contracts

Access the Match Contracts - Vacancy page (click the **Detail Panel** button on the Match Contracts page).

This example illustrates the fields and controls on the Match Contracts - Vacancy page. You can find definitions for the fields and controls later on this page.

Match Contracts

Vacancy

External Org ID:

SABPV001

BPV Internship Organization

Location Nbr:

1

Location 1

HEGIS Code:

10629

Agriculture

Internal contract:

0010002

Whatever

Plan:

Both

Maximum Nbr of Students:

2

*EmpIID:

SRN013

GELDER,NICOLAAS J

*EmpIID:

SRN011

FEITER,TEUNIS W

Field or Control	Description
EmplIID (employee ID)	Select students to add to this contract. The values that appear in the prompt differs depending on the BPV user settings (BOL/BBL match) and the Plan field (BOL/BBL/Both) on the BPV contract.
Detail Panel	Click the Detail Panel button to enter contract details for this student.

Updating a Student's Contract Details

Access the Match Contracts - BPV Vacancy Detail page (click the **Detail Panel** button on the Match Contracts - Vacancy page or the Match Students page).

This example illustrates the fields and controls on the Match Contracts - BPV Vacancy Detail page.

Match Contracts			
BPV Vacancy Detail		BPV Creation Dt: 12/31/1999	
EmpID:	SSRNL00011	Kaassnijder,Klaas	Action Date: 02/10/2009
External Org ID:	SABPV001	BPV Internship Organization	User ID: SAMPLE
Internal contract:	0010003	Internship for Administrative Employee students	
HEGIS Code:	10039	Administrative Employee	
Location Nbr:	1	Location 1	
<hr/>			
Outsourcing company:	<input type="text"/>		
Outsourcing Location:	<input type="text"/>		
<hr/>			
*Institution:	<input type="text"/> PSNLD	PeopleSoft University - NLD	*Program: <input type="text"/> R012 BOL Administrative Specialist
*Career:	<input type="text"/> BOL	Vocational Training (NLD)	*Acad Load: <input type="text"/> 0
*Career Nbr:	<input type="text"/> 0		
*Start Date:	<input type="text"/> 01/01/2000	*End Date: <input type="text"/> 01/01/2020	Printed: <input type="text"/> Not Printed
Status:	<input type="text"/> Active		
Instructor ID:	<input type="text"/> AA0002	Acosta,Paul	
Contact Nbr:	<input type="text"/>	Contract length in weeks:	<input type="text"/> 12
Contact nbr 2:	<input type="text"/>	Number of hours per week:	<input type="text"/> 16
Appendix	Total nbr of BPV Hours		192
Administrative internships should include at least the following tasks - Writing business letters - conducting business phone calls			Appendix

Update the student's contract information.

Related Links

[Creating Internship Contracts](#)

Updating a Student's Appendix Information

Access the Match Contracts - BPV Appendix Detail page (click the **Appendix** button on the Match Contracts - BPV Vacancy Detail page).

This example illustrates the fields and controls on the Match Contracts - BPV Appendix Detail page.

Match Contracts

BPV Appendix Detail


EmplID:

External Org ID: SABPV001 BPV Internship Organization

Internal contract: 0010002 Whatever

HEGIS Code: 10629 Agriculture

Action Date: 09/27/2004 **User ID:** PS

Appendix document:  **Add Appendix**

Appendix text

Adding Contracts to Students

This section discusses how to:

- Match contracts to students.
- Link contracts to a student.

Pages Used to Add Contracts to Students

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Match Students	SAD_BPV_MATCH2_NLD	Student Admissions > Internship Contracts NLD > BPV Match Students > Match Students	Search for and select students to which to link contracts.
BPV Student Detail	SAD_BPV_STD1_NLD	Click the Detail Panel button on the Match Students page.	Link contracts to students.

Matching Contracts to Students

Access the Match Students page (**Student Admissions > Internship Contracts NLD > BPV Match Students > Match Students**).

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

Match Students

Select

Deselect

*EmpIID:

SRN109

BUUREN,RONALD

*Institution:

PSNLD

PeopleSoft University - NLD

*Career:

BOL

Vocational Training (NLD)

*Program:

R002

Agriculture

☐ Open Only

Group:

Approved Academic Load:

Selected Participants						Customize Find View All	First 1 of 1 Last
ID	Name	Career	Program	Approved Academic Load	Detail Panel		
1	SRN109 BUUREN,RONALD	Vocational Training (NLD)	Agriculture	Vocational Training (NLD)			

Enter search criteria to retrieve students to which you want to link to contracts. Click the **Detail Panel** button to link contracts to students.

Linking Contracts to a Student

Access the BPV Student Detail page (click the **Detail Panel** button on the Match Students page).

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

BPV add student

Match Students

BPV Student Detail

EmpIID:

SRN109

BUUREN,RONALD

Career:

BOL

Vocational Training (NLD)

Program:

R002

Agriculture

Approved Academic Load:

Vocational Training (NLD)

Customize Find					First 1 of 1 Last
	*External Org ID	Internal contract	Detail Panel		
1	SABPV001	0010002			

Field or Control	Description
External Org ID (external organization ID)	Select the external organization that manages hosts the internship.
Internal contract	Select the contract that you want to link to this student.
Detail Panel	Click this button to access the Match Contracts - BPV Vacancy Detail page to view and update contract details.

Printing BPV Contracts

Run the Print BPV Contract (SABPVNL) PSJob, which runs three processes:

- Fill Contracts with Print Data (SAD_BPV_FILL) application engine process.

This process adds additional information from your system to PS_SAD_BPV_STC_NLD, which holds the contract.

- SABPVNL1 (SABPVNL1).

This process prints the contract.

- SABPVPNL (SABPVNL.sqr).

This process updates the print flag in the contract table.

You cannot change contract data once the contract has been printed.

Page Used to Print BPV Contracts

Page Name	Definition Name	Navigation	Usage
Print BPV Contracts	SAD_BPV_RUN_NLD	Student Admissions > Internship Contracts NLD > Print BPV Contracts > Print BPV Contracts	Print contract agreements.

Entering Contract Details and Signature Dates

This section discusses how to:

- Enter contract details.
- Update contract information for a student.

Pages Used to Enter Contract Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select BPV Contracts	SAD_BPV_CT_SUM_NLD	Student Admissions > Internship Contracts NLD > Select BPV Contracts	Select contracts by the available criteria and enter contract details, including signature dates.
Maintain BPV contracts	SAD_BPV_CTR_D1_NLD	Click the Detail Panel button on the Select BPV Contracts page.	View or update details about the contract.

Entering Contract Details

Access the Select BPV Contracts page (**Student Admissions** > **Internship Contracts NLD** > **Select BPV Contracts**).

This example illustrates the fields and controls on the Select BPV Contracts page: Contracts Detail tab. You can find definitions for the fields and controls later on this page.

Select BPV Contracts

Select Contracts

Change selection

EmpID:

Institution:

Career

Program:

Acad Load:

Group:

Date From:

Date-To:

Start Date:

End Date:

Org ID:

Type:

BPV Internship Organization

Open Only

Selected Participants

Contracts detail

Signatures

Contract printed

Detail Panel

EmpID

Name

*External Org ID

Organization

Internal contract

1

SRN109

BUUREN, RONALD

SABPV001

BPV Internship Organization

0010002

2

SRN110

DIJKXHOORN, ALF M M

SABPV001

BPV Internship Organization

0010002

Enter search criteria to retrieve students to which you want to update contract information. Click the **Detail Panel** button to update contract information, if the contract has not yet been printed. Enter signature dates on the Signatures tab.

Updating Contract Information for a Student

Access the Maintain BPV contracts page (click the **Detail Panel** button on the Select BPV Contracts page).

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

Maintain BPV contracts

Select BPV Contracts & Edit BPV Creation Date

BPV Contract

BPV Creation Date (BRON) 12/31/1999

Name: Kaassnijder,Klaas

Action Date: 02/10/2009

***External Org ID:** SABPV001

BPV Internship Organization

User ID: SAMPLE

Internal contract: 0010003

Internship for Administrative Employee students

Change

HEGIS Code: 10039

Administrative Employee

Location Nbr: 1

Location 1

Outsourcing company:

Outsourcing location:

Institution: PSNLD

Career: BOL

***Career Nbr:** 0

Acad Prog: R012

Acad Load: 0

***Start Date:** 01/01/2000

***End Date:** 01/01/2020

Printed: No Print

Status: Active

Instructor ID: AA0002

Acosta,Paul

Contact Nbr:

Contract length in weeks: 12

Contact nbr 2:

Number of hours per week: 16

Appendix

Total nbr of BPV Hours 192

Administrative internships should include at least the following tasks
 - Writing business letters
 -conducting business phone calls

Appendix

Enter contract details if the contract has not already been printed.

Field or Control	Description
Change	Click to replace the contract entered for the student by another contract. This can only be done when the contract is not printed. When you click the Change button the system retrieves the correct prompt table views for the External Org ID and Internal Contract fields—based on BPV user settings in combination with the academic load—and these fields are made available for entry so you can update them with the new contract.

(NLD) Creating Educational Agreements

Common Elements Used to Create Educational Agreements

<i>Field or Control</i>	<i>Description</i>
Appendix Document	The reference code of the appendix document.

Maintaining Coursework and Agreement Information

This section discusses how to maintain coursework and agreement information.

Page Used to Maintain Coursework and Agreement Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OWO Course and Support Agreements	SAD_AOHS_NLD	Student Admissions > Educational Contracts NLD > Course and Support Agreements	<p>This page is used to describe the contents of an appendix (with course and support issues) that is printed on the OWO (Onderwijsvereenkomst) contract. During the creation process of the OWO (SQR process), the appendix that is flagged as the default appendix is added to the OWO contract appendix table. Before printing, this appendix can be replaced for an individual student by another non default appendix from the OWO course and support appendix table. If required, the text can then be modified to the needs for this individual student.</p> <p>In the OWO course and support appendix section of the report, the text from the OWO contract appendix table is inserted during the print process.</p>

Maintaining Coursework and Agreement Information

Access the OWO Course and Support Agreements page (**Student Admissions > Educational Contracts NLD > Course and Support Agreements**).

This example illustrates the fields and controls on the OWO Course and Support Agreements page. You can find definitions for the fields and controls later on this page.

OWO Course and Support Agreements

Academic Institution: PSUNV PeopleSoft University
Academic Organization: LIBARTS College of Liberal Arts
Appendix document: 52A

Find | View All First 1 of 1 Last

***Effective Date:** 09/20/2004 **Status:** Active ☐ **Default**

***Description:**

Long Description

<i>Field or Control</i>	<i>Description</i>
Default	Select this option to make the appended document the default agreement.
Long Description	This region contains the default course and support agreements which can be set up according to the academic organization. The text is effective-dated. Individually this text can be replaced by other agreements in the AOHS appendix table.

Maintaining Financial Contribution Information

This section discusses how to maintain financial contribution information.

Page Used to Maintain Financial Contribution Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OWO Voluntary Contributions	SAD_AVB_NLD	Student Admissions > Educational Contracts NLD > Voluntary Contributions	Maintain information regarding a student's course work requirement and institutional support agreement. During the print process the voluntary contributions text will be inserted on the OWO report in the Voluntary contributions appendix section.

Maintaining Financial Contribution Information

Access the OWO Voluntary Contributions page (**Student Admissions > Educational Contracts NLD > Voluntary Contributions**).

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

OWO Voluntary Contributions

Academic Institution: PSUNV PeopleSoft University
Academic Organization: LIBARTS College of Liberal Arts
Appendix document: 52A

Find | View All First 1 of 1 Last

***Effective Date:** 09/20/2004 **Status:** Active ☐ Default

***Description:** Voluntary Contribution

Item Amount: 800.00

Description
 Voluntary contribution per semester.

Field or Control	Description
Item Amount	The entered amount is placed on a fixed position in the voluntary contribution appendix during the print process. The currency is placed by the report (it can be any currency). The voluntary contribution appendix usually contains a text (that explains for example the reason for the voluntary contribution) and the agreed amount. This amount is derived from this field.
Description	A short description of the appendix text. It is only informational. This can be used to find a specific appendix more easily in search records/prompts.

Reviewing and Updating Educational Agreements

This section discusses how to:

- Review and updating educational contract agreements.
- Review details of the OWO contract.
- Add general text appendixes.

Pages Used to Review and Update Educational Agreements

Page Name	Definition Name	Navigation	Usage
OWO Summary	SAD_OWO_CTRSUM_NLD	Student Admissions > Educational Contracts NLD > OWO Summary	Review and update educational contract agreements for individual students. Updating contract information is only possible when the OWO is not printed. After printing the OWO, only the print flag, return flag/date, and status (active/inactive) can be changed.
OWO Contract Summary	SAD_OWO_CNTRCT_SEC	Click the Detail button on the OWO Summary page to view the OWO Contract Summary page.	Review details of the OWO contract.
Other Text Appendixes	SAD_OWO_APP4_SEC	Click the Detail button on the OWO Contract Summary page to view the Other Text Appendixes page.	Add general text appendixes.

Reviewing and Updating Educational Contract Agreements

Access the OWO Summary page (**Student Admissions > Educational Contracts NLD > OWO Summary**).

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

The screenshot shows the 'OWO Summary' page. At the top, there are two buttons: 'Select OWO Contracts' and 'Refresh OWO Selection'. Below these is a search bar for 'EmplID' with the value '0004' and a magnifying glass icon. A section of filters includes 'Institution', 'Campus', 'Career' (set to 'UGRD'), 'Status', 'Program', 'Group select', and 'Term'. Below the filters is a table with columns: Print, Received, Details, Term, Contract number, Date Signed, EmplID, and Name. The table has one row with the number '1' in the first column. At the top right of the table area, there are links for 'Customize', 'Find', and a grid icon, along with pagination 'First 1 of 1 Last'.

Field or Control	Description
Select OWO Contracts	When you click this button, the entered values in the selection area are used to select the OWO contracts from the contract table. When the employee ID is entered, the selection is based only for this employee. If no employee is selected, the other selection fields are used.
Refresh OWO Selection	Click this button to initiate the selection fields.
EmplID	Enter the employee identification code for the student.
Institution	Enter the academic institution attended by the student.
Acad Prog (academic program)	Enter the academic program of the student.
Campus	Enter the campus with which the student is affiliated.
Career	Select the career with which the student is affiliated.
Term	Select the admit term.

Field or Control	Description
Status	Select Active or Inactive .
Group Select	If a group selection is required, define the source of the group (when one is selected, then this field becomes available) and enter the group name. The source of the group can be the Class table, Student Group table or Student Block Header table.

OWO Details

Field or Control	Description
Print	Select if you want to print the OWO to start automatically after the generation process.
Received	When an OWO contract has been printed, this flag can be checked after all signatures needed for the contract are received. On the detail page for this contract, the return date will be set to the system date. This date can be changed by the user.
Details	Click the detail button to view additional data on the OWO contract. When not printed yet, some data can be maintained by the user. After printing the contract, only status and return date for the signatures can be changed.
Contract Number	The contract number which is automatically assigned to this contract by the OWO creation process.
Date Signed	This is the date on which the contract has been created.
EmplID	The student ID for which the OWO contract is created.

More OWO details

Field or Control	Description
Career	The career with which the student is affiliated.
Program	The program with which the student is affiliated.

Field or Control	Description
Student Career Nbr (student career number)	The student career number with which the student is affiliated.
Campus	The campus with which the student is affiliated.
User ID	The ID of the user who is responsible for creating the OWO contract.

Reviewing Details of the OWO Contract

Access the OWO contract summary subpage (Click the Detail button on the OWO Summary page).

Field or Control	Description
Status	The status can be changed from <i>Active</i> to <i>Inactive</i> . The Reason field will appear.
Start Date	The matriculation date of the student.
End Date	The matriculation date of the student plus the duration.
Duration (Hours)	The total duration of the OWO agreement in hours.
Old contract nbr (old contract number)	If the OWO contract replaces another OWO contract, the old contract number can be maintained here.
Complete education	If this option is not selected, then all the plans linked to the student will display.
Agreements AOHS (agreements appendix educational help structure)	If this option is not selected, then you are able to link to another appendix. The description also becomes available for text entries related to the student. Only appendixes that are not the default appendix will appear in the available options.
Agreements AVB (agreements voluntary contributions)	If this option is not selected, then you are able to link to another voluntary financial contribution appendix. Enter the amount and description for the student. Only appendixes that are not the default appendix will appear in the available options.

Note: After the contract is printed no additional data can be entered. If you need to correct data, then the contract must be set to inactive, a reason entered, and then a new contract must be generated. You may reprint the contract.

Adding General Text Appendixes

Access the Other Text Appendixes page (Click the Detail button on the OWO Contract Summary page).

Enter additional text which can be added to the OWO contract. The information can be used for institutions that need to add extra data to the OWO contract. The report can be customized to put this text on any place on the OWO contract.

Determining a Selection Method for an Institution

This section discusses how to determine a selection method for an institution.

Page Used to Determine a Selection Method for an Institution

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OWO Setup Table	SAD_OWO_INS_NLD	Student Admissions > Educational Contracts NLD > OWO Setup	Determine selection method for an institution.

Determining a Selection Method for an Institution

Access the OWO Setup Table page (**Student Admissions > Educational Contracts NLD > OWO Setup**).

Use this page to control the way the OWO creation process should select the students, for which a contract is created. Choose one of the three options.

<i>Field or Control</i>	<i>Description</i>
Applicant	Only students for whom at least an application entry has been made can be selected during the OWO contract creation process.
Matriculation	Matriculation of a student enrollment is the basis for OWO creation. Only students with a matriculation record can be selected.
Activated for Term	Students need to be activated for a specific term first before they can be selected for the OWO creation process.

Creating OWO Contracts

This section discusses how to create OWO contracts.

Page Used to Create OWO Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create OWO Contracts	SAD_RUN_OWO_NLD	Student Admissions > Educational Contracts NLD > Create OWO Contracts	Generate educational contract agreements for groups of students or for individuals.

Creating OWO Contracts

Access the Create OWO Contracts page (**Student Admissions > Educational Contracts NLD > Create OWO Contracts**).

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

Create OWO Contracts

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

*Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Selection Criteria ☐

Academic Program: LAU Liberal Arts Undergraduate

Term: 0532 2004 Fall Qtr

Campus: MAIN Main Hacienda Campus

Group selection: Class table

Group:

Address Type

MAIL Mailing

Type of Name

LEG Legal

☒ Replace contracts

Current Effective Date

09/21/2004

Start Date

09/21/2004

End Date

12/31/2004

The actual process that generates the OWO is a batch process.

<i>Field or Control</i>	<i>Description</i>
Institution	Enter the institution for which you want to create the OWO.
Academic Career	Enter the career for which you want to create the OWO.

Field or Control	Description
Selection Criteria	Select this option if you want to create a contract for just one student. The Student ID and Career Nbr fields display.
Student ID	Select the student ID of the student for whom you want to create the OWO. This field displays only if the Selection Criteria check box is selected.
Career Nbr (career number)	Select the career number of the student for whom you want to create the OWO. This field displays only if the Selection Criteria check box is selected.
Academic Program	Enter the program for which you want to create the OWO.
Term	Enter the admit term for which you want to create the OWO.
Campus	Enter the campus for which you want to create the OWO.
Group selection	If a group selection is required, define the source of the group and (when one is selected this field becomes visible), enter the group name. The source of the group can be the Class table, Student group table or Student block header table.
Group	Select the group, block, or class section the student is in.
Address Type	Enter the address type that must be used for the student's address on the OWO.
Type of Name	Enter the name type that must be used for the student's name on the OWO.
Replace contracts	Use to set the old contract to inactive, allowing for a new OWO contract to be created.
Current Effective Date	Available when the Replace contracts check box is selected. Only contracts with an end date that is earlier than the entered current effective date are part of the selection
Start Date	When a start date is entered, it will be put on the OWO contract as start date and the end date must be entered . When not entered, the start date is determined by the OWO creation process.
End Date	End date must be entered if a start date is given. This date will be recorded on the OWO contract as the end date during the OWO creation process. If it is not entered, the creation process will automatically calculate the end date of the contract.

Printing OWO Contracts

This section discusses how to print OWO contracts.

Page Used to Print OWO Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Print OWO Contracts	SAD_RUN_OWO_NLD	Student Admissions > Educational Contracts NLD > Print OWO Contracts	Print educational contract agreements for groups of students or for an individual.

Printing OWO Contracts

Access the Print OWO Contracts page (**Student Admissions > Educational Contracts NLD > Print OWO Contracts**).

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

Print OWO Contracts

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

*Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Selection Criteria ☐

Academic Program: LAU Liberal Arts Undergraduate

Term: 0532 2004 Fall Qtr

Campus: MAIN Main Hacienda Campus

Group selection: Student Group table

Group: ACDX

If you want to print a contract for just one student, select the **Selection Criteria** option. The **EmplID** and **Career Nbr** fields appear on the page.

See Creating OWO Contracts.

Calculating Admissions Averages

Understanding Admissions Averages Calculation

When you evaluate an applicant for admission to your organization, you can evaluate that applicant by the grade point average he or she earned in a specific set of classes. For example, an institution with a nursing program can evaluate applicants based on the grade point averages applicants earned in nursing prerequisites.

You can calculate the grade point average, evaluate the applicant based on that grade point average—an SQC defined by your institution determines the status of the application—and then update the applicant's application status.

To evaluate applicants based on admissions averages:

1. Set up the rules for the delivered admissions averages SQC (ADEVLAVG.sqc).
2. Assign the admissions evaluation code to the applicant and run the Materials Extract process (ADMTLEXT.sqr).
3. Run the Evaluating Applicants process (ADMTLRTG.sqr) to calculate the average.
4. Update the application status (ADMTLPGS.sqr).
5. You can also update financial aid and student records and generate an admissions average report.

Prerequisites for Calculating Admissions Averages

To calculate admissions averages, you use rating components, rating schemes, and evaluation codes. You set up one rating component for averages (AVDAVG), but you can set up many rating schemes that use the averages rating component. You can name your rating schemes whatever you like, but you must link the average rating component to each scheme that calculates admissions averages. For example, suppose that you calculate averages for your nursing program using the rating scheme UAVGNUR, for your computer engineering program using the rating scheme UAVGCEN, and for your honors English program using the rating scheme UAVGHEN. You would need to assign each of these rating schemes the ACDACG rating component.

You enter an SQC on the rating scheme, and you link the rating scheme to the evaluation code. You enter this code when you run the Evaluation Calculation process (ADMTLRTG.sqr) to calculate the averages. The evaluation code is linked to the rating scheme, which tells the process to execute the SQC.

Steps to take before you calculate admissions averages:

- Define an admissions averages rating component.

Use the Rating Comp Def Table (rating component definition table) page to define an admission average rating component. Each rating scheme can have many rating components. For example, you can evaluate applicants based on an interview, SAT/ACT scores, overall GPA, and a grade average of a group of prerequisites. Each of these parameters would be defined as a rating component. You can also define a rating component for an overall score that the system uses to determine the application status. However, you need a rating component set up specifically for averages because the admissions averages SQC has to be associated with a specific rating component to calculate the desired averages.

Important! When you enter the Rating Comp Def Table page for the first time, the system asks you to enter an institution and a rating component. Enter ADAVG in the Rating Component field.

- Define an admissions averages rating scheme.

Use the Rating Scheme Table page to define the admissions average rating scheme that the system uses in the admissions evaluation process. You can name the rating scheme whatever you like, and you can define many rating schemes to calculate various admissions averages.

Use the Rating Components Table page to assign the admissions averages rating component (ADAVG) to the rating scheme, and to enter the SQC that the process uses to calculate averages.

When setting up the rating scheme for calculating admissions averages, be sure to select the Final Value check box on the Rating Components Table page. You must select this check box for the Evaluation Calculation process (ADMTLRTG.sqr) to consider this rating component in the admissions decision. Selecting this check box also enables you to post the results of the calculation to the application, and to update the Averages for Fin. Aid and Recs (averages for financial aid and records) page.

The Method field must be set to Automatic to call the averages calculation SQC.

Important! You must enter ADEVLAvg in the Formula ID field. This is the delivered SQC that the system must run to calculate admissions averages.

- Define an admissions averages evaluation code.

Use the Evaluation Table page to define your evaluation code for admissions averages. Select the rating scheme that you want to use to calculate admissions averages—the averages rating component (ADAVG) must be tied to this rating scheme—in the Overall Rating ID field. This is the hook that ties the evaluation code to the average calculation SQC. In addition, when you prepare to run the Evaluation Calculation process, you enter an evaluation code. The process runs the Evaluation Calculation process on applications that are assigned the same evaluation code.

Important! In order for an application to be considered during the Evaluation Calculation process, the application must have an evaluation code assigned on the Application Evaluation page.

Setting Up Rules for the Admissions Averages SQC

To set up rules for admissions averages SQC, use the Alternate Average Calculations component (PROG_AVG_CALC_DEFN).

This section discusses how to set up rules for the admissions averages SQC, and provides examples of average program calculation and external courses and admissions averages.

Page Used to Set Up Rules for the Admissions Averages SQC

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Program Average Calculation	PROG_AVG_CALC	Set Up SACR > Product Related > Recruiting and Admissions > Alternate Evaluations > Alternate Average Calculations	Set up rules for the delivered admissions averages SQC (ADEVLAVG). Using the criteria that you select in this page, the SQC searches the applicant's external course history to find courses that match the criteria that you set up here. After the process finds a match it takes the official grade from the external course history, converts it to a numerical value if it is not in this format already, and averages it with the other course grades it finds.

Setting Up Admissions Averages SQC Rules

Access the Program Average Calculation page (**Set Up SACR > Product Related > Recruiting and Admissions > Alternate Evaluations > Alternate Average Calculations**).

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

Program Average Calculation

Academic Institution: PSUNV PeopleSoft University
Evaluation Code: ADMAVG Admissions Average

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

Course Credit Count: 3.00

Crse Level: Junior

External Academic Level: 11th Grade

Minimum Score:

*Repeated Grade Processing: Highest

Find | View All First 1 of 1 Last

*Transcript Status: Final

Find | View All First 1 of 6 Last

*External Org ID 000000001

*Req. # 1

*School Course Nbr ENGL70

Min Grade

Cottonwood High School

SHORT STORY

Field or Control	Description
Course Credit Count	<p>Enter the minimum number of total course credits that the applicant must have taken in order for the process to calculate an admissions average. The average calculation process looks at each course listed in the Courses and Degrees page for this applicant to find matches based on the criteria you select. The process counts the number of course credits for each course.</p> <p>If the process—using the criteria that you set up—cannot find enough matches to add up to your course credit criteria, the process does not generate an average. The process instead produces the following error message: "An average was not calculated because the student has not met the minimum course credit count."</p> <p>See Viewing Admissions Calculation Errors.</p>
Crse Level (course level)	<p>Select the course level required for this average calculation. The process only looks at external courses that have the value that you select in the Course Level field on the Courses and Degrees page.</p>
External Academic Level	<p>Select the external academic level required for this average calculation. The process only looks at external courses that have this external academic level in the Acad Level field on the Courses and Degrees page.</p>
Minimum Score	<p>Enter a minimum score if you want the process to only include in the calculation average those external courses that contain a score of at least the value that you enter in the Grade In/Official field on the Courses and Degrees page. For example, A minimum score of 50 is entered. Thus, an external course that meets all of the other criteria that are set up on this page but contains a grade of less than 50 is not used in the average calculation.</p>
Repeated Grade Processing	<p>Select how you want the process to choose between two or more repeated courses. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are:</p> <p><i>First:</i> If the process finds a repeated course, it uses the grade of the first course it finds in the calculation process.</p> <p><i>Highest:</i> If the process finds a repeated course, it uses the highest grade of the repeated courses in the calculation process.</p> <p><i>Last:</i> If the process finds a repeated course, it uses the grade of the last course it finds in the calculation process.</p>
Transcript Status	<p>Select the transcript status to be used in this average calculation. The system only uses those applications with this transcript status in the calculation process. You can insert a row to specify more than one transcript statuses.</p>

Field or Control	Description
External Org ID (external organization ID)	Enter the external organization ID that is associated with the course that is to be used in this average calculation.
Req# (requirement number)	Requirement number enables the average calculation SQC (ADEVLAVG) to determine which group of courses should be evaluated together when more than one course can satisfy a program prerequisite. See Viewing an Average Program Calculation Example .
Wildcard	Select this option if you want to calculate all courses that begin with the value in the School Course Nbr field. For example, if you entered SCNC in the School Course Nbr field, and selected the Wildcard option, the process would look for any course beginning with SCNC, such as SCNC10, SCNC100, and SCNC15.
School Course Nbr (school course number)	Enter the school course number to be used for this average calculation.
Min Grade (minimum grade)	Enter a minimum grade if you want to override the Minimum Score field for this external course.

Viewing an Average Program Calculation Example

Suppose that one of the criteria with which you evaluate applicants is a grade point average of a select number of classes. You calculate the average and use the average calculation functionality to evaluate applicants and update the application status.

For example, suppose that you evaluate applicants on the grade point average of the following courses:

1. ENGL70
2. MATH104
3. One of the following: ENGL100, ENGL92, or SCNC25

Therefore, use an average based on the grades of only three courses in our Evaluation Calculation process. To calculate the average, enter the first course in the Program Average Calculation page just as in the previous page shot. Then, insert a row in the bottom portion of the page and do as follows:

This is an example of Program Average Calculation page (1 of 4).

Program Average Calculation			
Academic Institution: PSUNV		PeopleSoft University	
Evaluation Code: ADMAVG		Admissions Average	
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	Course Credit Count:	3.00
Crse Level:	Junior	External Academic Level:	11th Grade
Minimum Score:		*Repeated Grade Processing:	Highest
Find View All First 1 of 1 Last			
*Transcript Status: Final			
Find View All First 2 of 6 Last			
*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	2	MATH104	
		ADV ALGEBRA	
Cottonwood High School			

Select your second prerequisite in the **School Course Nbr** field and change the **Req#** value to 2. This tells the system to treat this course as a separate course, and to use the grades that the applicant earned in both of these courses in the calculation. Then insert a row as follows:

This is an example of Program Average Calculation page (2 of 4).

Program Average Calculation			
Academic Institution: PSUNV		PeopleSoft University	
Evaluation Code: ADMAVG		Admissions Average	
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	Course Credit Count:	3.00
Crse Level:	Junior	External Academic Level:	11th Grade
Minimum Score:		*Repeated Grade Processing:	Highest
Find View All First 1 of 1 Last			
*Transcript Status: Final			
Find View All First 3 of 6 Last			
*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	3	ENGL100	
		SPEECH	
Cottonwood High School			

Enter a third course in the **School Course Nbr** field and change the **Req#** to 3. Then, insert two more rows and select the remaining two courses, but keep the **Req#** value the same.

This is an example of Program Average Calculation page (3 of 4).

Program Average Calculation			
Academic Institution: PSUNV		PeopleSoft University	
Evaluation Code: ADMAVG		Admissions Average	
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	Course Credit Count:	3.00
Crse Level:	Junior	External Academic Level:	11th Grade
Minimum Score:		*Repeated Grade Processing:	Highest
Find View All First 1 of 1 Last			
*Transcript Status: Final			
Find View All First 4 of 6 Last			
*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	3	ENGL92	
Cottonwood High School			

Note in page shot 3 of 4 that **Req#** is still 3, but you selected a second course.

This is an example of Program Average Calculation page (4 of 4).

Program Average Calculation			
Academic Institution: PSUNV		PeopleSoft University	
Evaluation Code: ADMAVG		Admissions Average	
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	Course Credit Count:	3.00
Crse Level:	Junior	External Academic Level:	11th Grade
Minimum Score:		*Repeated Grade Processing:	Highest
Find View All First 1 of 1 Last			
*Transcript Status: Final			
Find View All First 5 of 6 Last			
*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	3	SCNC25	
Cottonwood High School			

Note in page shot 4 of 4 that **Req#** is still 3, but you selected a third course. Because there are three courses with the **Req#** of 3, the process only uses one of the courses in the calculation. If the applicant took only one of the courses, the system would use that course. If the applicant took more than one of these courses, the system treats the courses as repeated and selects a class to use in the calculation process based on the option selected in the **Repeated Grade Processing** field.

The system averages the scores of ENGL70 and MATH104, and the Highest of ENGL100, ENGL92, and SCNC25. From here, go to the Evaluation Calculation page to run the process and then to the Overall Rating page to view the result in the **Rating Value** field.

Viewing an External Courses and Admissions Averages Example

The courses that you select on the Program Average Calculation page are assigned to the student on the Courses and Degrees page. The calculation process looks at the Courses and Degrees page for each student to determine which courses to use in the calculation.

The following example represents an external course for an applicant.

Student Recruiting > Maintain Prospects > Academic Information > Education > Courses and Degrees or **Student Admissions > Application Entry > Academic Information > Education > Courses and Degrees**

This image illustrates an example of Courses and Degrees page.

The screenshot displays the 'Courses and Degrees' page for Jane Smith (AD5023). The page is divided into several sections:

- External Organization:** Shows 'Cottonwood High School' with ID 000000001.
- External Course Defaults:** A form with fields for Data Number (1), Data Source (School), Acad Level (Junior), Institution (PSUNV), Course Type (Course), Unit Type (Quarter), Grading Scheme (Normal), External Career (High Schl), Term Type (Quarter), External Term, Term Year, Course Level (Senior), Units Taken (6.00), and Grading Basis (GRD).
- External Courses:** A table with columns: Course Seq, School Subject, Description, Course Nbr, and Course Name. It lists one course: MATH105 (Mathematics).
- External Degrees:** A table with columns: Degree, Description, Degree Date, Data Source, Degree Status, and Honors Category. It lists one degree: High School Diploma (HSD).
- Transfer To:** A dropdown menu set to 'Course Credits' with a 'Go' button.

For this course to be included in the average calculation, the **Course Nbr** (course number) field on the Courses and Degrees page: Course tab must correspond with the **School Course Nbr** (school course number) field on the Program Average Calculation page. If you choose a course level and external academic level on the Program Average Calculation page, the process compares that to the **Course Level** field and **Acad Level** (academic level) field on Courses and Degrees page: Details tab. If there is a match, then this course is included in the average calculation. The SQL goes down each course on the applicant's record to look for a match based on the criteria that you set up.

The system uses the translated value in the field to the right of the **Grd In/Official** (grade in/official) field for the average calculation. The average calculation only runs for numeric grades. The average calculation converts non-numeric grades into numeric grades to be used in the average.

Running the Application Materials Extract Process

Before you can run the Evaluation Calculation process you must run a process to link all or a portion of a person's application materials to an application, or you must link the materials manually through the Application Materials page. These materials can then be used for evaluating the application. The Application Materials Extract process extracts the materials associated with the rating scheme that is assigned to the evaluation code. Evaluation codes must be assigned to the applicant on the Application Evaluation page so the Application Materials Extract process knows which records to extract. Ensure that the admissions evaluation code is assigned to the applicants before running the extract process or before linking the materials manually.

Related Links

[Linking Application Materials to Applications in Batch](#)

[Entering General Materials for Prospects and Applicants](#)

Evaluating Applicants Based on Admissions Averages

After you have properly flagged the external course grades to include in the average calculation—by setting up the rules for the SQC—you can run the Evaluation Calculation process (ADMTLRTG). To run this process, select an evaluation code. By selecting an evaluation code you call the rating scheme (which is tied to the evaluation code). When you defined the rating scheme in an earlier step, you entered the averages SQC. Thus, running the Evaluation Calculation process performs the average calculation.

After the process calculates the average, you can view the result. But if the process encountered an error, you can view the error messages online, correct the error, and re-run the process.

This section discusses how to:

- Run the Evaluation Calculation process.
- View the newly calculated average.
- Correct admissions calculation errors.
- View admissions calculation errors.

Page Used to Evaluate Applicants Based on Admissions Averages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Alternate Avg Calc Messages (alternate average calculation messages table)	AVG_PRCES_MSG_TBL	Student Admissions > Application Evaluation > Alternate Avg Calc Messages	View admissions calculation errors.

Running the Evaluation Calculation Process

Use the Evaluation Calculation page to calculate the admissions average. This process updates the **Rating Value** field on the Overall Rating page with the newly calculated average.

Enter the evaluation code that calls the appropriate admissions average rating scheme. The rating scheme that you select here must contain the admissions average rating component (ADAVG) and SQC (ADEVLAVG) to calculate the admissions average.

Related Links

[Calculating Rating Values Through an Automatic Process](#)

Viewing the Newly Calculated Average

Use the Overall Rating page to view the newly calculated average. After you run the Evaluation Calculation process with the delivered averages SQC (ADEVLAVG), the resulting average appears on this page in the **Rating Value** field. However, the average only appears on this page when the system successfully calculates the average. If the **Evaluated** check box is selected but there is no value in the **Rating Value** field, an error was encountered during the process. The next section describes how to view admissions calculation errors.

Related Links

[Creating Application Evaluations](#)

Correcting Admissions Calculation Errors

The Evaluation Calculation process runs for every applicant who has been assigned the evaluation code for which you are running the process. Sometimes an applicant who has been assigned the evaluation code does not meet all of the criteria for calculating an average that you select. For example, if you specify that applicants must have taken the course SCNC100 to be given an average, and an applicant who has been assigned the evaluation code for which you run the Evaluation Calculation process has not taken this course, the process does not generate an average. Instead, the Evaluation Calculation process generates an error message that tells you why it did not generate an average.

You know that an error occurred when the Evaluated check box is selected but there is no value in the **Rating Value** field on the Overall Rating page. View Admissions Calculation Errors on the Alternate Avg Calc Messages (alternate average calculation messages) page.

Related Links

[Creating Application Evaluations](#)

Viewing Admissions Calculation Errors

Access the Alternate Avg Calc Messages page (**Student Admissions >Application Evaluation >Alternate Avg Calc Messages**).

This example illustrates the fields and controls on the Alternate Avg Calc Messages page. You can find definitions for the fields and controls later on this page.

Alternate Avg Calc Messages

Find | View All
First 1 of 1 Last

Instance:
Institution:
ID:
Appl Nbr:

Eval Code:
Component:

Process Instance:

Evaluation Nbr:

ID:

Application Nbr:

Prog Nbr:

Rating Component:

Evaluation Code:

User ID:

Run Date/Time:

Message Set Number:

Message Number:

Message Severity:

Message Text:

Description:

Note: You must enter at least one search parameter in addition to institution.

Field or Control	Description
Instance	Enter a process instance. Each time the evaluation process runs, the system assign a number to that specific instance. Enter a process instance number to search for error messages generated during that instance of the process.
ID	Enter a student's identification number. The system looks for any error messages that the system generated when calculating averages for this ID.
Appl Nbr (application number)	Enter an application number. The system looks for any error messages that the Evaluation Calculation process generated when calculating averages for this application number.
Eval Code (evaluation code)	Enter an evaluation code. The system looks for error messages that the Evaluation Calculation process generated for this evaluation code.
Component	Enter a rating component. The system looks for error messages that the Evaluation Calculation process generated for this rating component.
Search	Click this button to search for messages using the criteria you select.

Error Messages

There are three error messages delivered with the application. The process generates error messages when an applicant who has been assigned the evaluation code does not meet the criteria you specified for the admissions SQC on the Avg Prog Calc page.

- Minimum course credit count not met.

Description: "An average was not calculated because the student has not met the minimum course credit count."

Example: You enter 60 in the Course Credit Count field on the AVG Prog Calc page but the applicant's total course credit count only equals 58.

Description: "An average was not calculated because the student has not met the minimum grade requirement."

Example: You select 2.0 in the **Minimum Score** field. The applicant took the prerequisites you specified but did not achieve a grade of 2.0 in that course.

- Program prerequisites have not been met.

Description: "An average was not calculated because the student does not have the necessary courses to meet the program prerequisites."

Example: You entered the prerequisite SCNC10 in the **School Course Nbr** field on the Avg Prog Calc page but this course is not listed on this applicant's external course record.

Running the Application Status Update Process

Use the Application Status Update page to update the application statuses of those applicants for whom the Evaluation Calculation generated an admissions average. These are applicants who were assigned the admissions average evaluation code and who met all of the SQC criteria that you specified on the Program Average Calculation page. This process also updates the Averages for Fin. Aid and Recs page.

Select the evaluation code that contains the admissions average rating scheme. This is the same evaluation code that you used to run the Evaluation Calculation process. The application status update process uses the result from the Evaluation Calculation process to update the applicant's application status.

Note: An SQC defined by your institution determines the status of the application based on the sum of the final evaluation calculation values.

The application status update process also updates the **Program Action** field on the Application Program Data page.

Related Links

[Understanding How to Evaluate Applicants Using Automatic Processing](#)

[Entering Application Program Data](#)

Updating Admissions Averages for Financial Aid and Student Records

The section discusses how to update admissions averages for financial aid and student records.

Page Used to Update Admissions Averages for Financial Aid and Student Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Avgs for Fin Aid and Records (averages for financial aid and student records)	ADM_EVAL_FA_SR_PNL	Student Admissions > Application Evaluation > Avgs for Fin Aid and Records	Update admissions averages in PeopleSoft Financial Aid and PeopleSoft Student Records.

Using the Averages for Fin Aid and Records Page

Access the Avgs for Fin Aid and Records page (**Student Admissions > Application Evaluation > Avgs for Fin Aid and Records**).

This example illustrates the fields and controls on the Avgs for Fin Aid and Records page.

Avgs for Fin Aid and Records

Bill Harris
Person ID: AD9200

Institution: PSUNV
Academic Career: UGRD

Admit Term: 0540
Rating Component: ACT

Appl Nbr	Eval Dt	Eval Code	Eval Nbr	Acad Prog	Prog Actn	Value	FA	SR
00024158	10/25/2004	ACT	1	FAU	Admit	28.0000	<input type="checkbox"/>	<input type="checkbox"/>

There are two ways financial aid and student records personnel can use admissions averages. The first way is to access this page and view the averages for specific applicants.

However, if you want to update PeopleSoft Financial Aid and PeopleSoft Student Records automatically, you can write SQRs that extract the information from Recruiting and Admissions. First, write an SQR to select or clear the **FA** (financial aid) and **SR** (student records) check boxes. This SQR tells the system

which application numbers you want to make available to Financial Aid and Student Records. Second, write an SQR to extract the admissions average data. The SQR(s) that you write should extract the averages and send them to Financial Aid to be used in determining awards, and to Student Records so that the averages travel with the applicant throughout his or her career at your organization.

Using Admissions Average Cutoff Reports

Understanding the Admissions Averages Cutoff Report

Recruiting and Admissions enables you to assess an evaluated applicant pool to determine the admissions average that drive certain program actions. For example, you might need to know how many applicants within an evaluation code, who have admissions averages between 85 and 100, have the program action of ADMT.

To generate an admissions average cutoff report:

1. Set up the criteria that determine the content of the report.

The report tallies the number of applicants who:

- Are assigned the specified evaluation code, have an admissions average that falls within the range, and have the appropriate program action based on the range you define.
- Are assigned the specified evaluation code, have an admissions average that falls within a defined range, but do not have the appropriate program action based on the range you define.
- Are assigned the specified evaluation code (the total number of applicants assigned this evaluation code).

2. Run the average cutoff report process (ADAVGCUT.sqr).

The process retrieves the rating component that is attached to the admissions average SQC (ADEVLAVG.sqc). Next, the process tallies applicants based on the program actions and value ranges that you specified on the Average Cutoff Report page. Finally, the process generates a report according to your Process Scheduler settings and calls it `adavagcut.lis`.

Generating Admissions Average Cutoff Reports

To set up the average cutoff table, use the Average Cutoff component (AVERAGE_CUTOFF_TBL).

This section discusses how to set up the average cutoff table.

Pages Used to Generate Admissions Average Cutoff Reports

Page Name	Definition Name	Navigation	Usage
Average Cutoff Table	AVG_CUTOFF_TBL	Set Up SACR > Product Related > Recruiting and Admissions > Alternate Evaluations > Average Cutoff Table > Avg Cutoff Table	Set up the criteria that you want the system to report.
Average Cutoff Report	RUNCTL_ADAVGCUT	Student Admissions > Reports > Average Cutoff Report	Run the average cutoff report.

Setting Up the Average Cutoff Table

Access the Average Cutoff Table page (**Set Up SACR > Product Related > Recruiting and Admissions > Alternate Evaluations > Average Cutoff Table > Avg Cutoff Table**).

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

Average Cutoff Table

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate
Academic Program: LAU Liberal Arts Undergraduate
Admit Term: 0540 2005 Spring
Admit Type: FYR First-Year

Find | View 2 First 1-3 of 3 Last

*Program Action:	ADMT	*Evaluation Code:	ADMAVG	+ -
Cutoff Average From Range:	3.6000	*Cutoff Average To Range:	4.0000	

*Program Action:	DENY	*Evaluation Code:	ADMAVG	+ -
Cutoff Average From Range:	1.0000	*Cutoff Average To Range:	3.0000	

*Program Action:	WAIT	*Evaluation Code:	ADMAVG	+ -
Cutoff Average From Range:	3.1000	*Cutoff Average To Range:	3.5000	

Field or Control	Description
Program Action	Enter the program action that an applicant should be assigned if his or her average falls within the range that you enter. The report displays the number of applicants whose average falls within this range but <i>are not</i> assigned this program action, as well as those who fall within the range and who <i>are</i> assigned this program action.

Field or Control	Description
Evaluation Code	Enter the evaluation code for which you want to generate a cutoff report. The system only queries applications that are assigned the evaluation code that you enter here for the program action and average range.
Cutoff Average from Range	Enter the minimum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.
Cutoff Average to Range	Enter the maximum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.

In the previous page shot, all applications to the undergraduate liberal arts program for admit term Fall 2001 with the first year admit type, that are assigned the evaluation code ADMAVG and that have an average between 3.6 and 4.0 inclusive appears on the report under the program action of *Admit*. Those applications with an average between 1.0 and 3.0 inclusive appears on the report under the program action of *Deny*. Those applications with an average between 3.1 and 3.5 inclusive appears on the report under the program action of **Wait**.

Related Links

[Recruiting and Admissions Reports: Selected Reports](#)

Creating Alternate Program Offers

Understanding Alternate Program Offers

When applicants do not meet the requirements for their requested program, you can evaluate them in alternate programs, thereby giving them a second chance to attend your organization. For example, an applicant might be denied entry to your highly competitive engineering program, but when re-evaluated for a less competitive program the same applicant might be accepted.

To create alternate program offers you must first assign an alternate academic program and an alternate evaluation code. You select the primary academic program to which the person is applying (such as FAU), and then specify the alternate program (such as LAU). Thus, all applicants who get denied or waitlisted for FAU, in this example, get evaluated in the LAU program.

After you have assigned alternate program evaluation codes, you run the Assign Alternate Eval Codes process (ADALTEVL.sqr) that assigns alternate evaluation codes to applicants. You will select applicants based on academic institution, the academic program that they requested, and the admit term. For example, if you select the program LAU and admit term 0450, the process will assign an alternate evaluation code to applicants who applied to but were denied or waitlisted to LAU in Fall 2001.

After you have assigned alternate evaluation codes to applicants, you must either run the materials extract process, or assign the materials manually. Then you must run the Evaluation Calculation process to evaluate them in the new program using the new evaluation code that you just assigned to them.

After the Evaluation Calculation process calculates the overall rating score, you run the Alternate Programs process (ADALTPRG.sqr). The Alternate Programs process compares the minimum rating score that you define to the overall rating score that the Evaluation Calculation process calculates. If the applicant meets the criteria, the Alternate Programs process inserts a new row in the person's application (adm_appl_prog) for the existing application number and assigns a new program number. Thus, you still have access to the application in which the person was denied or waitlisted.

Assigning Alternate Evaluation Codes

To set up alternate evaluation codes, use the Alternate Offer component (ALT_OFFER_TABLE).

This section discusses how to assign alternate evaluation codes.

Page Used to Assign Alternate Evaluation Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Alternate Offer Table	ALT_OFFER_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Alternate Evaluations > Alternate Offer Table	Assign alternate offer program evaluation codes to academic programs.

Assigning Alternate Evaluation Codes

Access the Alternate Offer Table page (**Set Up SACR > Product Related > Recruiting and Admissions > Alternate Evaluations > Alternate Offer Table**).

<i>Field or Control</i>	<i>Description</i>
Alternate Academic Program	Enter the alternate program. Any person who applies and is either denied or waitlisted to the academic program that you specified upon entering this page will be evaluated in the alternate program that you enter here. For example, you can set it up so that any person applying to LAU, who is denied or waitlisted in that program, will be evaluated in <i>FAU</i> using the <i>ACT</i> evaluation code.
Alternate Evaluation Code	Enter the evaluation code the system will use to evaluate the applicant in the alternate program. For example, an applicant who was denied or waitlisted in the undergraduate engineering program using the <i>UGENG</i> evaluation code may be accepted into the Liberal Arts program using the <i>ACT</i> evaluation code. Define alternate evaluation codes on the Evaluation Table page.

Selecting Applicants for Alternate Offers

This section discusses how to select applicants for alternate offers.

Page Used to Select Applicants for Alternate Offers

Page Name	Definition Name	Navigation	Usage
Assign Alternate Eval Codes (assign alternate evaluation codes)	RUNCTL_ADALTEVL	Student Admissions > Processing Applications > Assign Alternate Eval Codes	Run the Alternate Averages process. The process assigns the alternate evaluation code that you set up on the Alternate Offer Table page to any applicants who applied to the academic institution and academic program for the admit term that you select.

Selecting Applicants for Alternate Offers.

Access the Assign Alternate Eval Codes page (**Student Admissions > Processing Applications > Assign Alternate Eval Codes**).

Note: Admissions application records use the **Last Admit Term** value to determine if the program, plan, or subplan should appear in the prompt. If the **Last Admit Term** field is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Field or Control	Description
Institution	Enter the academic institution to which the academic program belongs.
Academic Program	<p>Enter the academic program. This is the original academic program to which the applicants applied but into which they were not admitted. The process assigns the alternate evaluation code to any applicant who applied to this academic program—in the admit term you specify—and has a program action of <i>Deny</i>, <i>Waitlist</i>, or <i>Waitlist Offer Accepted</i>.</p> <p>If a student meets the above criteria but already has an application to the alternate program, the Alternate Averages process <i>does not</i> assign the alternate program code.</p>
Admit Term	The process only assigns the alternate evaluation code to applicants who were denied or waitlisted in this term.

Click **Run** to run the Alternate Averages process at user-defined intervals.

Assigning Alternate Programs

This section discusses how to run the Alternate Programs process to assign alternate programs, and provides an example of how alternate programs are assigned to students.

Page Used to Assigning Alternate Programs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Alternate Program Addition	RUNCTL_ADALTPRG	Student Admissions > Processing Applications > Alternate Program Addition	Run the Alternate Programs process. The Alternate Programs process updates applications by comparing the minimum score that you enter on this page to the overall rating that the Evaluation Calculation process calculates. The Alternate Programs process uses the information that you define on this page to update information in the new application row.

Running the Alternate Programs Process

Access the Alternate Program Addition page (**Student Admissions > Processing Applications > Alternate Program Addition**).

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

Alternate Program Addition

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

Report Request Parameters	
*Institution:	PSUNV PeopleSoft University
*Academic Career:	UGRD Undergraduate
Alternate Evaluation Code:	ACT ACT Test
*Rating Component:	1OVER Overall Rating
*Rating Value:	27.0000
*Approved Academic Load:	Full-Time
*Academic Plan:	ART
*Campus:	MAIN
*Program Action:	ADMT
*Update Eval Status:	IP
Action Reason:	AUTO Auto Assigned
*Admit Term:	0550 2005 Fall

Note: Admissions application records use the **Last Admit Term** value to determine if the program, plan, or subplan should appear in the prompt. If the **Last Admit Term** field is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table, (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Field or Control	Description
Institution	Enter the academic institution for which you want to run the process.
Academic Career	Enter the academic career for the alternate academic program.
Alternate Evaluation Code	Enter the alternate evaluation code that is assigned to the applicants to be evaluated. The Alternate Programs process updates the applications of only those applicants who have been assigned this alternate evaluation code. Therefore, you must have already run the Alternate Eval Code process to assign applicants an alternate evaluation code. Define alternate evaluation codes on the Evaluation Table page.
Rating Component	Enter the rating component that you want to use to evaluate applicants. The rating component defines the format and meaning of the rating value. For example, in the preceding page shot, you selected the ACT rating component. The rating value therefore represents the minimum ACT score that can be admitted into the alternate program.

Field or Control	Description
Rating Value	<p>Enter the minimum score for consideration in the alternate program. The Alternate Programs process compares this score to the overall rating value that the Evaluation Calculation process calculates. If the overall rating value is equal to or more than the value you enter in this field, then the applicant is accepted into the alternate program. In the above example, the applicant must score at least 27 on the ACT to be accepted into the alternate program.</p> <p>See Assigning Alternate Programs.</p> <hr/> <p>Note: After an applicant is accepted into the alternate program, the Alternate Programs process creates a new row in the person's application (adm_appl_prog) for the existing application number. The system assigns a new program number for the new program and plan into which the person was accepted.</p> <hr/>
Approved Academic Load	Select the academic load that you want the process to assign to anyone who meets the criteria defined on this page.
Academic Plan	Enter the academic plan that you want the process to assign to anyone who meets the criteria defined on this page.
Campus	Enter the campus that you want the process assign to anyone who meets the criteria defined on this page.
Program Action	Enter the program action that you want the process assign to anyone who meets the criteria defined on this page.
Update Eval Status (update evaluation status)	Enter the evaluation status that you want the process to assign to anyone who meets the criteria defined on this page.
Action Reason	Enter the action reason that you want the process to assign to anyone who meets the criteria defined on this page.
Admit Term	Enter the admit term that you want the system to assign to anyone who meets the criteria defined on this page.

In the above example, applicants to the undergraduate career at PSUNV with an alternate evaluation code of *ACT* and an ACT score of at least 27 will receive a program action of *Admit*.

Click **Run** to run the Alternate Programs process at user-defined intervals.

Viewing an Example of How Alternate Programs are Assigned to Students

The following person applied and was denied to the FAU program. Note that the program number is 0, the academic program is *LAU*, and the program action is *DENY*.

This is an example of Application Program Data page (1 of 2).

Biographical Details		Addresses		Regional		Application Program Data		Application Data	
Bill Harris				AD9200					
Academic Institution:		PeopleSoft University		Application Number:		00024329			
Academic Career:		Undergraduate		Career Number:		<input type="text" value="0"/>			
Program Data Find View All First 1 of 2 Last									
Program Number:		<input type="text" value="0"/>		Effective Date:		<input type="text" value="08/24/2006"/>			
*Admit Term:		<input type="text" value="0540"/> 2005 Spr		Effective Sequence:		<input type="text" value="1"/>			
*Academic Program:		<input type="text" value="LAU"/> Lib Arts		Expected Graduation Term:		<input type="text" value=""/>			
*Academic Load:		<input type="text" value="Full-Time"/>		*Campus:		<input type="text" value="MAIN"/> Main			
<input type="checkbox"/> Joint Program									
Program Status									
Status:		Cancelled		Action Date:		08/24/2006			
*Program Action:		<input type="text" value="DENY"/> Deny		Action Reason:		<input type="text" value="AUTO"/> Auto Assigned			
Evaluation									
Plan Data									
*Academic Plan:		<input type="text" value="ENGL-BA"/> English (BA)		Major:		<input type="text" value="BA"/>			
Sub-Plan Data									
*Sub-Plan:		<input type="text" value=""/>							
Transfer To: <input type="text" value="Education"/> <input type="button" value="Go"/>									

- First, you set up the Alternate Offer Table page, which enables applicants who were denied or waitlisted in LAU to be evaluated in FAU.

See [Assigning Alternate Evaluation Codes](#).

- Then you run the Alternate Averages process (ADALTEVL.sqr).

See [Selecting Applicants for Alternate Offers](#).

The Alternate Averages process assigns an alternate evaluation code (ACT) to the person's application, as illustrated in the following example. Access the Application Evaluation component by selecting **Student Admissions > Application Evaluation > Application Evaluation**.

This example is an example of Application Evaluation page.

Application Evaluation		Overall Rating	Committee Rating	Evaluator Rating
Bill Harris		ID	AD9200	
Academic Career:	Undergraduate	Application Nbr:	00024329	
Prog Nbr:	1	Academic Program:	Fine Arts Undergraduate	
Find View All First 1 of 1 Last				
Evaluation Code: ACT		ACT Test		
Evaluation Nbr: 1		<input type="checkbox"/> Recalculate Evaluation		
Evaluation Eval Stat: Progress Eval Dt: 08/24/2006		Rating Committee Rating ID: Overall Rating ID: ACT		
Comment:				
Transfer To:		Application Evaluator Ratings		Go

Note in the page above that the evaluation code now reads *ACT*.

- This new evaluation code has not been evaluated through the Evaluation Calculation process.

Therefore, you ran the Materials Extract process to extract the application data, and then you ran the Evaluation Calculation process to calculate the overall rating score based on the rating components for the ACT evaluation code.

See [Linking Application Materials to Applications in Batch](#).

See [Calculating Rating Values Through an Automatic Process](#).

- Next you run the Alternate Program process (ADALTPRG.sqr), which compares the minimum score that you enter on the Alternate Program Addition - Parameters page to the overall rating score that the Evaluation Calculation process calculates.

The applicant in our example was denied in his requested program (LAU), but was accepted into the alternate program (FAU), as illustrated in the following page shot. Maintain Applications is found by selecting **Student Admissions > Application Maintenance > Maintain Applications**.

This is an example of Application Program Data page (2 of 2).

Biographical Details		Addresses		Regional		Application Program Data		Application Data	
Bill Harris				AD9200					
Academic Institution:		PeopleSoft University		Application Number:		00024329			
Academic Career:		Undergraduate		Career Number:		<input type="text" value="0"/>			
Program Data Find View All First 1 of 1 Last									
Program Number:		1		Effective Date:		08/24/2006			
*Admit Term:		<input type="text" value="0540"/> 2005 Spr		Effective Sequence:		<input type="text" value="1"/>			
*Academic Program:		<input type="text" value="FAU"/> Fine Arts		Expected Graduation Term:		<input type="text" value=""/>			
*Academic Load:		<input type="text" value="Full-Time"/>		*Campus:		<input type="text" value="MAIN"/> Main			
<input type="checkbox"/> Joint Program									
Program Status									
Status:		Admitted		Action Date:		08/24/2006			
*Program Action:		<input type="text" value="ADMT"/> Admit		Action Reason:		<input type="text" value="AUTO"/> Auto Assigned			
Evaluation									
Plan Data Find View All First 1 of 1 Last									
*Academic Plan:		<input type="text" value="UNDECL-UG"/> Undeclared Undergraduate		Major:		<input type="text" value=""/>			
Sub-Plan Data Find View All First 1 of 1 Last									
*Sub-Plan:		<input type="text" value=""/>							
Transfer To: <input type="text" value="Education"/> <input type="button" value="Go"/>									

Note that the program number is now *1*. The Alternate Programs process inserted a new row and incremented the program number by one. Thus, the program action of *DENY* for LAU still exists in the student's record. This new row contains the new academic program *FAU* (the alternate program) and note that the program action is *ADMT*. The Alternate Programs process also updated the remaining parameters that you selected on the Alternate Program Addition page, such as the action reason, campus, and academic load.

By evaluating this applicant in an alternate program, you were able to admit a person whom you would have otherwise denied.

Updating Application Program Actions and Statuses

Understanding Admissions Program Actions and Statuses

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*.

As applicants move through the admissions process, you must take action on their academic program and update their program status. You can update a single application, a group of applications, or you can use Population Selection or a mass change definition to update a large number of applications. When you enter new program actions, you will enter new effective dates. Thus, you can maintain a history of previous actions.

Note: For institutions who are new to this functionality, Oracle recommends the use of the Update Program Action/Reason process with Population Selection for batch processing. See the “Updating Program Actions and Action Reasons Using Population Selection” section.
Updating Program Actions and Action Reasons Using Population Selection

As you begin using program actions and statuses provided with Recruiting and Admissions, start with the most straightforward cases to become accustomed to the process. Then begin to work on the special cases, such as deferrals and reconsiderations.

Program status is the high level relationship a person has with an academic program. When you select a program action to change an applicant's program data, the program status often changes. Thus, the **Program Action** field on the Application Program Data page contains different rows of program data for a student. For example, a student goes from being an applicant to being admitted.

A *program action* is a change to a person's program data. An *action reason* indicates why a particular program action was taken, or offers a further description of the program action. For example, you can record that an applicant has withdrawn an application for an academic program. The reason you enter could be *After Decision* or *Before Decision*.

For your reference, the program actions and program statuses relevant to admissions are explained in the following table:

<i>If you Select this Program Action:</i>	<i>The System Updates the Program Status to:</i>
Application Readmit Application Reconsideration	Applicant
Waitlist Waitlist Offer	Waitlisted
Admit Conditional Admit	Admitted
Admission Revocation Deny Administrative Withdrawal Applicant Withdrawal	Cancelled
Intention to Matriculate	Prematriculant
Matriculation	Active
Data Change Defer Decision Defer Enrollment Plan Change Program Change	The same Program Status as the previous row.

Program Status values are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values require a substantial programming effort. You can, however, modify the *descriptions* of these values. Remember, however, that the altered description needs to retain its original meaning to avoid confusion.

The **Program Status** values delivered with your system that are relevant to admissions, along with their *original* descriptions, are:

- AC - Active in Program
- AD - Admitted
- AP - Applicant
- CN - Cancelled

- DE - Deceased
- PM - Prematriculant
- WT - Waitlisted

Reviewing Admissions Program Action Definitions

The previous section details which admissions program actions set which program statuses. The chart below lists **Program Action** definitions and provides additional information about what happens when you choose a **Program Action**. Also, if any action triggers or requires an additional step, those requirements are described here.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Application	A person has an application that is under consideration by an academic program.	None.
Readmit Application	A person has applied to reenter a student career and academic program for which he or she already has a student record.	When you choose this action, the Career Number field becomes available for input. You must select which student record should be populated with the readmit information if the student ends up enrolling again. Additionally, if you enter this action, the admit type you enter on the Application Data page must be one associated with readmit processing.
Reconsideration	A person who has a cancelled status for the academic program, but is being reconsidered for admission in the same applicant pool.	After an action of reconsideration is taken, you can admit the applicant. You cannot take an action of <i>Admit</i> if the program status is <i>Cancelled</i> . You must first select a <i>Reconsideration</i> action.
Waitlist	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. For example, there may not be enough space in the class. The candidate is currently active on the waitlist.	None.
Waitlist Offer	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. The candidate has been offered a place on a waitlist, but has not accepted that offer.	None.

<i>Admissions Program Action</i>	<i>Explanation</i>	<i>Additional Steps or Requirements Caused by this Action</i>
Admit	A person has been evaluated and admitted into an academic program.	When a person has a status of admitted or higher, depending on your application center setup, the Deposits link becomes available for input. If, in your application center, you use a deposit fee code that requires you to calculate a deposit, you must calculate an enrollment deposit before you can save the page. If your application's deposit fee code does not require you to calculate a deposit, or if you do not have a deposit fee code associated with your application center, you are not required to calculate a deposit. If an application was given a status of admit through the Application Status Update process, you can run the Calculate Deposits process to calculate an enrollment deposit for those applications.
Conditional Admit	A person has been evaluated and accepted into an academic program on a conditional basis. Along with a <i>Conditional Admit</i> action you can assign a checklist code to help track the outstanding requirements for the conditions of admission.	Same as for <i>Admit</i> .
Admission Revocation	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission. The individual was assigned a <i>Cancelled</i> status from an <i>Admitted</i> or <i>Active</i> status.	When revoking admission for a person who has a current action of <i>Matriculation</i> , and therefore an <i>Active</i> status, you must go to Records and Enrollment to take this action on the Student Program/Plan component. When you revoke admission from Records and Enrollment, the Student program information is deleted and your application information is updated as <i>Cancelled Due to Admission Revocation</i> . If the person never had an action of matriculation, you can add an <i>Admission Revocation</i> action directly in PeopleSoft Recruiting and Admissions.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Deny	A person has been denied admission to an academic program.	None.
Administrative Withdrawal	A person's application to an academic program has been withdrawn from consideration for admission or from enrollment in a class. This can be done before or after an action of admit has been taken or after the applicant has achieved active status. In addition, reasons can be created to clarify when or why the application was withdrawn.	None.
Applicant Withdrawal	A person has withdrawn from consideration for admission or from the entering class. Reasons can be created to clarify when or why the withdrawal occurred. For example, an action of applicant withdrawal with <i>Before Decision</i> as the reason indicates the individual withdrew early enough in the process that no admission decision had been made. A <i>Waitlist Withdrawal</i> reason indicates someone who did not want to accept a place on the waitlist.	None.
Intention to Matriculate	A person has indicated intent to matriculate, but has not completed all the steps to become an active student. Reasons can be defined to clarify why the candidate is changed from an admitted status to a <i>Prematriculant</i> status. For example, if you require that an admitted student submit multiple deposits to secure a place in the class, after the first deposit is received, you might indicate an intention to matriculate action with a reason of <i>First Deposit</i> .	None.

<i>Admissions Program Action</i>	<i>Explanation</i>	<i>Additional Steps or Requirements Caused by this Action</i>
Matriculation	A person has completed all necessary steps to become an active student in an academic program.	When you enter an action of <i>Matriculation</i> , you must click the Create Program button that creates a record for this person in PeopleSoft Student Records. You can not save the page until you click this button. After you matriculate the applicant, the component is saved. Also, all fields become unavailable for input because this person now belongs to PeopleSoft Student Records.
Data Change	Data relative to an applicant's academic program was changed. This action records the fact that a change was made.	None.
Defer Decision	An evaluation was performed on an application, but a decision was not made. This action records the fact that an application has been evaluated. For example, a person applies under an early notification plan. The person is evaluated but does not meet the early decision criteria. The final decision is deferred until the regular decision deadline.	None.
Defer Enrollment	A person has been admitted and may be active for one admit term but will actually enroll in a later admit term. This action enables you to change the admit term for the applicant and record that he or she is deferring enrollment.	None.
Plan Change	The academic plan to which an applicant is applying was changed.	None.
Program Change	The academic program to which an applicant is applying was changed.	None.

Updating the Program Action and Status of One Application

Use the Application Program Data page to update the program action and status of one application. If you only have *one* application to update, do so through the Maintain Applications component.

Related Links

[Entering Application Program Data](#)

Updating Program Actions and Statuses of Multiple Applications

This section discusses how to update program actions and statuses of multiple applications.

Page Used to Update Program Actions and Statuses of Multiple Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Action/Reason Entry	ADM_ACT_ENTRY	<ul style="list-style-type: none"> • Student Admissions > Application Evaluation > Application Decisions > Action/Reason Entry • Student Admissions > Application Maintenance > Action/Reason Entry 	Update multiple applications to an identical program action and status. If you must update a <i>group</i> of applications which are for the same academic program and admit term with the same program action, it is faster to do so through this page, as opposed to one at a time on the Application Program Data page.

Updating Program Action and Status of Multiple Applications

Access the Action/Reason Entry page (**Student Admissions > Application Evaluation > Application Decisions > Action/Reason Entry** or **Student Admissions > Application Maintenance > Action/Reason Entry**).

This example illustrates the fields and controls on the Action/Reason Entry page. You can find definitions for the fields and controls later on this page.

Action/Reason Entry

Action/Reason Parameters

Academic Institution:	PSUNV	PeopleSoft University	Program Action:	ADMT	Admit
Academic Career:	UGRD	Undergrad	Action Reason:		
Academic Program:	LAU	Lib Arts	Action Date:	10/31/2004	Seq: 1
Admit Term:	0550	2005 Fall			

Apply to Program Application

Application Nbr	ID	Name	Prog Nbr	
00022502	SF0140	Vickson, Sebastian	0	Create Program

Program Data	Program Status
Effective Date: 07/09/1998 Institution: PeopleSoft University Acad Prog: Law Admit Term: 1998 Fall Campus: Walnut Creek Campus Acad Load: Full-Time	Sequence: 0 Status: Applicant Action Date: 07/09/1998 Prog Actn: Applicatn Action Rsn:

Note: Admissions application records use the **Last Admit Term** value to determine if the program should appear in the prompt. If the **Last Admit Term** field is populated on the Academic Program Table (ACAD_PROG_TBL), and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Field or Control	Description
Admit Term	Enter an admit term. Admit terms are defined on the Term Values Table page.
Program Action	Enter the program action to be entered on the applications you are updating. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Action Reason	Enter an action reason to be entered on the applications if you have defined any reasons for this program action. Values for this field are defined in the Action Reason Table page.
Action Date	The default for the action date is your system date.
Seq (sequence)	If the action you are taking has the same date as the current action, enter a 1. Enter a 2 for another action on the same date. The default sequence is 0.

Field or Control	Description
Application Number and ID	Enter the first application number to be processed. The ID displays. If you do not know the application number, prompt on the ID field.
Program Number	Enter the program number if the application has multiple program numbers. When you navigate out of this page or click the Refresh button, you can verify that you have the correct person and application by reviewing the information displayed in the Program Data and Program Status group boxes.
Create Program	After entering an application number, click this button to update the program data for the application number that you enter. This button is only available to click if you entered a program action of <i>MATR</i> .
Calculate Deposits	Click this link to calculate deposits. The Calculate Deposits page appears. This link appears if you have entered a program action of <i>ADMT</i> and you have set up deposits for the application center.

Updating Program Actions and Action Reasons Using Population Selection

This section discusses how to run the Update Program Action/Reason process.

Page Used to Run the Update Program Action/Reason Process

Page Name	Definition Name	Navigation	Usage
Update Program Action/ Reason	SAD_APL_PRG_RUN	Student Admissions > Processing Applications > Update Applications > Update Program Action/ Reason	Run the Update Program Action/Reason process for a group of applicants.

Updating Program Actions and Action Reasons Using Population Selection

Access the Update Program Action/Reason page (**Student Admissions** > **Processing Applications** > **Update Applications** > **Update Program Action/Reason**).

This example illustrates the fields and controls on the Update Program Action/Reason page. You can find definitions for the fields and controls later on this page.

This page enables you to update program actions and action reasons for multiple applications, using Population Selection.

Population Selection

Use this group box to select the applicants whose applications are to be updated via the Update Program Action/Reason process.

Population selection is a method for selecting the IDs to process for a specific transaction. 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 selection tool (PS Query, Equation Engine, or external file) to identify IDs for a specific transaction, you must use it.

See "Understanding the Population Selection Group Box" (Campus Community Fundamentals)

Field or Control	Description
Selection Tool	Select a tool to create the group of applicants whose records you want to update. The fields in this group box change depending on your selection. The Population Selection context definition, <i>Update Program Action/Reason</i> , delivered to support the use of population selection with this process, is configured for use with <i>Equation Engine</i> , <i>External File</i> , and <i>PS Query</i> .

In creating either a query or equation for use with the Update Program Action/Reason process, the bind record SAD_APL_PRG_BND must be included in the query or equation. If the bind record is not included, then the query or equation will not appear as prompt value for the Query Name or Equation Name field. The bind record contains the required fields for the update process: Emplid, Institution,

Academic Career, Application Number, and Application Program Number. Whether you use PS Query or Equation Engine, values for these fields for the selected applicants must be passed through in the selection tool in order for the process to know which records to update. You may extend the selection criteria beyond the required data fields by including other fields or by joining to other records. For example, you may want to include program action or admit term as part of the selection criteria and specify a value either in the query or equation or as a run time prompt. If External File is used as the selection tool, then the inbound file must also contain those data required fields.

The system delivers sample queries and equation. The sample queries are:

QA_CS_AD_PS_APPL_PRGUPD_01 and QA_CS_AD_PS_APPL_PRGUPD_02. The sample equation is: ADADPSAPPUPD.

Program Action - Action Reason

Use this group box to specify the program action and action reason to be entered on the applications you are updating.

Field or Control	Description
Effective Date	Enter a date equal to or greater than the System Date. The default value is the System Date.
Use System Date	Select this check box to always use the System Date and ignore the value in the Effective Date field.

The Update Program Action/Reason process first selects the applications according to the criteria defined in the Population Selection group box. Then, for each application, the process will add a new row to the Application Program Data page with the program action, action reason, and effective date that you have specified on the Program Action - Action Reason group box.

Updating Program Actions and Statuses Using Mass Change

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*.

This section provides an overview of how to update program actions and statuses using mass change and discusses how to run the Application Program Update process.

Understanding Multiple Application Program Action and Status Updates

If you have a large number of applications you want to update with the same program action, action reason, and academic program status, you can use a background process.

To update program actions and statuses of multiple applications:

1. Set up your Mass Change Definition.

Use the Mass Change Definition - Description page to enter your mass change definition. The mass change definition defines the criteria for selecting which applications should be updated. PeopleSoft provides a sample mass change definition called *Application Program Update Select*. However, your institution might have defined its own mass change definition for updating program information, or your institution might have changed the shipped sample.

See *PeopleTools: Data Management*, “Mass Change”

2. Specify your Mass Change Criteria and Defaults.

Use the Mass Change Definition - Criteria and Defaults page to set up your mass change criteria. You also choose the program action and action reason codes to be added to the selected application records. The system automatically updates the program status according to the action taken.

There is one SQL statement execution sequence for this Mass Change Definition: *Select Applicant Criteria*.

In the **Defaults** group box, select the codes you want added to the new program row for the selected applications. You may select values for program action and action reason. For example, you might be updating these applications with a program action of *DENY*, and an action reason of *AUTO*. These two fields are stored on the Application Program Data page.

3. Generate your SQL Statement to select the applications to be updated.

Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition. Click the **Clear Sw** button then the **Generate SQL** button so do this. After generating the SQL, select **Save**. After setting up your mass change definition and generating your SQL statement, you are ready to process your mass change.

4. Run a Mass Change Group to select the applications to be updated.

Use the Run Mass Change page to process your mass change and select the actual applications to be updated during the Application Program Update process. This process selects the actual applications to be updated.

Because you want to delete any data in the temp file before running this process, you can use a mass change group that PeopleSoft provides, which deletes the temp using the delivered Communication - Delete Temp mass change definition and runs your *Application Prog Update Select* mass change definition.

Select *Application Prog Update Base* in the **Mass Change Group ID** field. If you want to create a different Mass Change Group or modify *Application Prog Update Base*, use the Mass Change Group component before running the mass change group on Run Mass Change. On Run Mass Change, click the **Execute Mass Change Group** radio button to make the **Mass Change Group ID** field available for selection.

5. Run the Application Program Update process to do the actual updating of applications.

Use the Application Program Update page to update the program data of the selected applications. A new row of program data is added to the selected applications on the Application Program Data page.

Pages Used to Run the Application Program Update Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Program Update	RUNCTL_PROGUPDT	Student Admissions > Processing Applications > Update Applications > Application Program Update	<p>Update the program data of the selected applications.</p> <p>This process uses the applicants selected when running the mass change group to insert the program action and program reason defined on the Criteria and Defaults page of the Mass Change Definition component. You must first process your mass change group before running the application program update process.</p>
Mass Change Definition	MC_DEFN_00	Student Admissions > Processing Applications > Mass Change > Mass Change Definition	Define criteria for applications to be updated.
Mass Change Group	MC_DEFN_00	Student Admissions > Processing Applications > Mass Change > Mass Change Group	Define the execution sequence for the mass change definitions.
Run Mass Change	MC_DEFN_00	Student Admissions > Processing Applications > Mass Change > Run Mass Change	Run the mass change group to select the application to be updated via the application program update process.

Managing Enrollment

Understanding Enrollment Management Targets

This section discusses:

- Enrollment management targets.
- Cohort, population, and division.
- Examples of enrollment management targets.

Learning About Enrollment Management Targets

Enrollment Management is an extremely flexible feature. Although there are many ways in which your institution can use Enrollment Management, you must first think about how you want to set up and use this tool. By spending time now thinking about the design, you will save time later.

Because this feature is so flexible, we can only show you examples of how you might want to use it. There are virtually no rules, only possibilities. How you set up and design your enrollment management targets can be as simple or as complex as you want.

With Recruiting and Admissions, you can store the following types of enrollment management information:

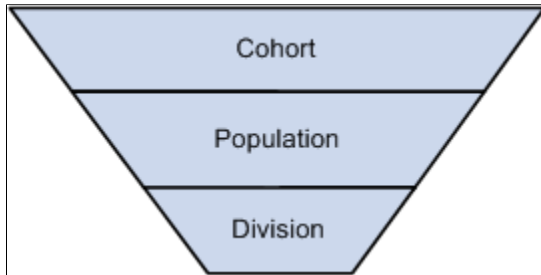
- Target enrollment numbers.
- Actual enrollment numbers.

You can also group target enrollment numbers and actual enrollment numbers into levels that you define.

Learning About Cohort, Population, and Division

Enrollment management targets are set up using a three-level structure that consists of the following elements: cohort, population, and division. These terms can mean whatever you need them to mean. Cohort, population, and division are different levels, from highest to lowest, that you set up, define, link to one another and for which you set targets. They are conceptually similar to the three-level structure found in communications.

This diagram illustrates the enrollment management level structure.



Cohort is the highest of the three levels. The cohort is the starting point for your target development. An example of a cohort level that you can define is the entire group of students in an academic year. You can define a cohort level of 2005 and set an enrollment target of 500 students for that academic year. Alternatively, you can break this up into a cohort level for academic terms of Fall 2005 and Spring 2006.

Population is the next level down the hierarchy. You can define a population level by academic career. Alternatively, you can define a population level by school or college. It is entirely up to you how you define each level.

Division is the final bottom level in the enrollment management target setup. You can define a division level, for example, by gender, ethnicity, academic program, admit type, or program status. There are numerous options for how to break down and define enrollment management levels.

Viewing Examples of Enrollment Management Targets

The following examples illustrate how enrollment management targets can be set up.

Example 1 - One Detail

Suppose that the PeopleSoft University College of Engineering is concerned about enrolling more women. You want to conduct a recruiting effort to target women for the 2005 academic year. You might consider setting up the following enrollment management target to track your efforts. The following table shows a *detail* enrollment management target.

Field	Detail Target
Cohort	2005 Academic Year
Population	College of Engineering
Division	Female
Target	200

Example 2 - Two or More Details (a Group)

Now, suppose that you want to break this down from the 2005 Academic Year into targets for each term, Fall and Spring. This is the place to introduce the idea of a *group* enrollment management target. In this case, you set up two detail enrollment management targets and join them as a group to form one group enrollment management target. Instead of one detail with a cohort for the entire academic year of 2005 (Example #1), now you have two detail targets defined; one with a cohort for each term and a target of 100 (Example #2). You can combine two or more details into one group enrollment target.

Field	Detail Target 1	Detail Target 2
Cohort	Fall 2005	Spring 2006
Population	College of Engineering	College of Engineering
Division	Female	Female
Target	100	100

Example 3 - More Details

The College of Engineering consists of four different academic programs: Mechanical Engineering, Chemical Engineering, Electrical Engineering, and Civil Engineering. In this example, you want each program to set its own targets, not just one overall target for the entire College of Engineering. Assume that you are setting the target for the entire 2005 Academic Year, and not by term this time. You can set up a group of four detail enrollment management targets, one for each program as follows:

Field	Detail Target 1	Detail Target 2	Detail Target 3	Detail Target 4
Cohort	2005	2005	2005	2005
Population	Mech. Eng.	Chem. Eng.	Elect. Eng.	Civil Eng.
Division	Female	Female	Female	Female
Target	100	100	100	100

Example 4 - Complex Details

To add more complexity, suppose that the College of Engineering is concerned not only with enrolling more women, but also with enrolling other underrepresented minorities as well: African Americans, Native Americans, and Latinos. You want to set up enrollment management targets for all women and underrepresented minorities for the 2005 Academic Year for each of the four academic programs within the College of Engineering. That is 16 different enrollment management target details. Here is one way that you could set this up:

Field	Detail Target 1	Detail Target 2	Detail Target 3	Detail Target 4
Cohort	2005	2005	2005	2005
Population	Mech. Eng.	Mech. Eng.	Mech. Eng.	Mech. Eng.
Division	Female	African American	Latino	Native American
Target	100	100	100	100
	Detail 5	Detail 6	Detail 7	Detail 8
Cohort	2005	2005	2005	2005
Population	Chem. Eng.	Chem. Eng.	Chem. Eng.	Chem. Eng.
Division	Female	African American	Latino	Native American
Target	50	50	50	50
	Detail 9	Detail 10	Detail 11	Detail 12
Cohort	2005	2005	2005	2005
Population	Elect. Eng.	Elect. Eng.	Elect. Eng.	Elect. Eng.
Division	Female	African American	Latino	Native American
Target	25	25	25	25
	Detail 13	Detail 14	Detail 15	Detail 16
Cohort	2005	2005	2005	2005
Population	Civil Eng.	Civil Eng.	Civil Eng.	Civil Eng.
Division	Female	African American	Latino	Native American
Target	20	20	20	20

In the preceding example, a group enrollment target that you define might consist of *all* 16 of the detail targets, but it does not have to. You can, for example, set up a group of the horizontal detail targets in the above table, or a group of the vertical detail targets. It all depends on what you want to do with the information, and how you want to access it and report on it. There are several possible ways to use the enrollment management targets as tools in your recruiting efforts.

Setting Up Enrollment Management Targets

To set up enrollment management targets, use Enrollment Target Division component (TARGET_DIV_TABLE), Enrollment Target Population (TARGET_POP_TABLE), and the Enrollment Target Cohort component (TARGET_COH_TABLE).

This section explains how to define for enrollment management the following items:

- Divisions
- Populations
- Cohorts

Start by defining divisions and then define populations and cohorts, because you attach divisions and populations to cohorts.

Pages Used to Define Divisions, Populations, and Cohorts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Target Division Table	TARGET_DIV_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Enrollment Targets > Enrollment Target Division > Target Division Table	Define a division.
Target Population Table	TARGET_POP_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Enrollment Targets > Enrollment Target Population > Target Population Table	Define a population enrollment management target.
Enrollment Target Cohort	TARGET_COH_TABLE	Set Up SACR > Product Related > Recruiting and Admissions > Enrollment Targets > Enrollment Target Cohort	Define a cohort enrollment management target.

Defining a Cohort

Access the Enrollment Target Cohort page (**Set Up SACR > Product Related > Recruiting and Admissions > Enrollment Targets > Enrollment Target Cohort**).

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

Enrollment Target Cohort

Cohort: F2002

*Description: Fall 2002

*Short Description: Fall 2002

Find | View All

First 1 of 9 Last

*Population: ALL All Programs

Find | View All

First 1-3 of 5 Last

*Division

AFRAM African American

ALL All Programs

FEMALE Female

After you set up your divisions and populations, you set up the cohort. As an example, set up an enrollment target level that tracks the enrollment of women, in all university programs, for the Fall 2002.

Field or Control	Description
Population	Enter the populations that you want to attach to this cohort. In this example, you attached the population of <i>All Programs</i> to the <i>Fall 2002</i> cohort. You can attach multiple populations to a cohort. Define populations on the Target Population Table page.
Division	Enter the divisions that you want to attach to this cohort. In our example, you attached the <i>African American</i> , <i>Female</i> , and <i>All Program</i> divisions to the <i>Fall 2002</i> cohort. You can attach multiple divisions to a cohort. Define divisions on the Target Division Table page.

Performing Enrollment Management

This section discusses how to:

- Define enrollment management targets.
- Set additional target details.

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- Process enrollment management targets.
- Display enrollment management target results.
- Display target results with the Enrollment Management Summary page.

Pages Used to Perform Enrollment Management

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Target	ENRL_MGMT_TARGET	Student Admissions > Enrollment Targets > Define Enrollment Targets > Enrollment Target	Set enrollment targets for each level that you defined.
Target Detail	ENRL_MGMT_DETAIL	Student Admissions > Enrollment Targets > Define Enrollment Targets > Target Detail	Specify additional details about a target.
Target Applicants	ENROLL_MGMT_ID	Student Admissions > Enrollment Targets > Define Enrollment Targets > Target Applicants	<p>Display a list of all the people that meet the target selection criteria.</p> <p>The Enrollment Target process populates the values in this page. A list of people who meet your target selection criteria appears on the bottom section of the page. For each person, it displays the ID, name, application number, program number, and the number of times that person is counted for this detail or group. If you are displaying a detail target, then this field is always <i>1</i>. If you are displaying a group target, then this number could be anything depending on the number of times the person met the criteria for each detail target within the group.</p>

Page Name	Definition Name	Navigation	Usage
Calculate Enrollment Targets	RUNCTL_ENRL_TARGET	Student Admissions > Enrollment Targets > Calculate Enrollment Targets	Process the enrollment management target and obtain current results. After you have set up and defined your enrollment management target levels, you can run the Enrollment Target process at any time to obtain the results and see how your institution is doing with its efforts towards these targets.
Enrollment Target Summary	ENROLL_TARGET_SUMM	Student Admissions > Enrollment Targets > Enrollment Target Summary > Enrollment Target Summary	View enrollment management target results.

Defining Enrollment Management Targets

Access the Enrollment Target page (**Student Admissions > Enrollment Targets > Define Enrollment Targets > Enrollment Target**). You must have already defined cohorts, populations, and divisions.

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

Enrollment Target | Target Detail | Target Applicants

Target Sequence Nbr: 000380 Delete Target Detail

Group / Detail Information

☒ **Group**
☐ **Detail**

***Cohort:** F2002 Fall 2002

***Population:** LAU LAU

Division: FEMALE Female

Comment: Undergraduate Liberal Arts Female students with a current status of applicant for Fall 2002

Target / Real: 100 / 0

Result / Actual: 0 / 0

Result DateTime:

Select Prog

☒ **Current**
☐ **All**

Group Detail Selection Find | View All First 1 of 1 Last

Detail Sequence: + -

Detail Find | View All First 1 of 1 Last

***Institution:** PSUNV PSU

***Term:** 0475 2002 Fall

***Career:** UGRD Undergrad

Group/Detail Information

<i>Field or Control</i>	<i>Description</i>
Group	Select this option to set up a group enrollment management target consisting of multiple detail targets.
Detail	Select this option to set up a detail enrollment management target. This is the default setting.
Cohort	Select the cohort for this enrollment management target.
Population	Enter the population for this enrollment management target.
Division	Enter the division for this enrollment management target.
Target	Enter the target number for this enrollment management target.
Result	After you run the Enrollment Target process, this field displays the total number of application rows meeting the target selection criteria.
Actual	After you run the Enrollment Target process, this field displays the total number of people meeting the target selection criteria. If it is a detail row, the Actual field contains the same number as the Result field.
Real	<p>After you run the Enrollment Target process, this field displays the same value as the Result field. For group targets, you can change this field to any number between (and including) the result and actual number.</p> <p>For example, suppose that for a group target of Fall 2005 undergraduate enrollment, the Result field displays <i>100</i>. However, suppose that some of these people applied for two or more programs. Therefore, the Actual field displays <i>80</i>. The Real field defaults to <i>80</i> but you can change it to any number within that range that is appropriate, for example, <i>90</i>. You can use the Target Applicants page to view a list of the people who meet your target selection criteria and verify the correct <i>real</i> number. You can also use the Enrollment Management Summary page to view results.</p>

Field or Control	Description
Result Date/Time	After you run the Enrollment Target process, the date and time the most recent results were calculated for this enrollment target appear.

Select Prog

Choose an application program setting:

Field or Control	Description
Current	Select this option to have the Enrollment Target process check only the most current application row. If a student is in this application program, and matches the target selection criteria, he or she is included in the count.
All	<p>Select this option to have the Enrollment Target process check all the application rows. If a student has any application program row that matches the target selection criteria, he or she is included in the count.</p> <p>For example, suppose that a person has applied to the LAU academic program as illustrated in the following table:</p>

Program	Effective Date	Status
LAU	03/01/05	Admitted
LAU	01/01/05	Applied

Field or Control	Description
	<p>You create an enrollment target detail in which the program is <i>LAU</i> and the status is <i>Applied</i>, then:</p> <p>If you select the All option, the student is included in the enrollment target count on 3/01/05.</p> <p>If you select the Current option, the student is <i>not</i> included in the enrollment target count on 3/01/05. The student's most current application program status (highest effective date) is <i>Admitted</i>.</p>

Group Detail Selection

<i>Field or Control</i>	<i>Description</i>
Detail Sequence	Use this field only if you are creating a group enrollment management target that consists of a series of detail targets. You would select all the detail targets here.

Detail

<i>Field or Control</i>	<i>Description</i>
Career	Enter the academic career for this enrollment management target.
Term	Enter the term for this enrollment management target.

Setting Additional Target Details

Access the Target Detail page (**Student Admissions > Enrollment Targets > Define Enrollment Targets > Target Detail**).

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

[Enrollment Target](#)
[Target Detail](#)
[Target Applicants](#)

Target Sequence Nbr: 000380

Target Criteria
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

Institution: PSUNV **Career:** Undergrad **Term:** 0475

Selection Criteria

☐ **Admit Type** ☒ **Program Status** ☒ **Academic Program**
☒ **Gender** ☐ **Ethnic Group**

Admit Type Criteria
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

*Admit Type:

Status Criteria
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

*Status: Applicant

Academic Program Criteria
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

*Acad Prog: Liberal Arts Undergraduate

Gender Criteria
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

*Gender: Female

Ethnic Group Criteria
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

*Ethnic Group:

In the **Selection Criteria** group box, select any additional criteria that you want to use to define your target. These are selection criteria beyond the academic institution, academic career, and academic term that you defined on the Enrollment Target page. The specific cohort, population, and division should drive the selection of any of these fields.

Note: Admissions application records use the **Last Admit Term** value to determine if the program, plan, or subplan should appear in the prompt. If the **Last Admit Term** field is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Field or Control	Description
Admit Type	Select this check box if you want to define your target by admit type. After you select this check box, the Admit Type field becomes available for input.
Program Status	Select this check box if you want to define your target by program status. After you select this check box, the Status field becomes available for input.

Field or Control	Description
Academic Program	Select this check box if you want to define your target by academic program. After you select this check box, the Acad Prog (academic program) field becomes available for input.
Gender	Select this check box if you want to define your target by gender. After you select this check box, the Gender field becomes available for input.
Ethnic Group	Select this check box if you want to define your target by ethnic group. After you select this check box, the Ethnic Group field becomes available for input.

If this detail comprised your entire enrollment management target, then you have completed all the necessary data entry. Remember to save the page. If you are creating a group enrollment management target and this was just one detail target, display the Enrollment Target page again and specify your additional detail targets. Use the **Group - Detail Selection** field to find all the detail targets that you must specify (roll up into) the group enrollment management target.

Note: The Target Applicants page displays only the list of students meeting the selection criteria *after* you have run the Enrollment Target process.

Processing Enrollment Management Targets

Access the Calculate Enrollment Targets page (**Student Admissions > Enrollment Targets > Calculate Enrollment Targets**). You must first set up the target detail on the Enrollment Target and Target Detail pages.

Field or Control	Description
Cohort	Select the cohorts for which you want to process enrollment management targets.

Click **Run** to run the Enrollment Target process at user-defined intervals.

Displaying Enrollment Management Target Results

After you have run the Enrollment Target process, you can display the results to see how your institution is progressing with its recruiting efforts towards the target. There are two ways that you can obtain enrollment management target information:

- Through the Enrollment Target page.

After you have run the enrollment management target process for a specific enrollment management target, you can use the Enrollment Target page to display the calculated enrollment figures.

- Through the Enrollment Management Summary page.

Related Links

[Setting Up Enrollment Management Targets](#)

Displaying Target Results with the Enrollment Management Summary Page

Access the Enrollment Target Summary page (**Student Admissions** > **Enrollment Targets** > **Enrollment Target Summary** > **Enrollment Target Summary**). You must first run the Enrollment Target process.

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

Enrollment Target Summary

Selection Criteria

Cohort: Fall 2002 **Population:** **Division:** **Group / Detail:**

Customize Find View All First 1-7 of 45 Last								
	Seq Nbr	Cohort	Population	Division	Target	Result	Real	Result DateTime
1	000250	Fall 2002	Non-Degree Seeking	African American	25	0	0	
2	000260	Fall 2002	Non-Degree Seeking	Female	100	0	0	
3	000270	Fall 2002	Non-Degree Seeking	Latino	25	0	0	
4	000280	Fall 2002	Non-Degree Seeking	Native American	25	0	0	
5	000290	Fall 2002	Non-Degree Seeking	All Programs	200	0	0	
6	000300	Fall 2002	Non-Degree Seeking	Freshmen	100	0	0	
7	000310	Fall 2002	Undergraduate Fine Arts	African American	25	0	0	

Entering Selection Criteria

<i>Field or Control</i>	<i>Description</i>
Cohort, Population, and Division	Select the cohort, population, and division for which you want to display targets.
Search	Click to display the specified target results.

Viewing Results

The bottom section of the page displays the target results in the following columns:

<i>Field or Control</i>	<i>Description</i>
Seq Nbr (sequence number)	The target sequence number.

Field or Control	Description
Cohort	The defined cohort.
Population	The defined population.
Division	The defined division.
Target	The target number you originally set for this enrollment management target.
Result	The current result count for this target.
Real	The current real count for this target.
Result Calculated Date/Time	The most recent date and time these results were last calculated.

Using Enrollment Management Target Templates

Use the Enrollment Management Template feature to easily create new targets by copying the details that you want from existing targets. Using templates makes the process of creating enrollment management targets much simpler. For example, you might have to set up a target detail enrollment for the next term that is identical in all other respects as a target detail for this term. Alternatively, you might want to have the same detail and group targets as last academic year but you must have a different target number. The target template feature can manage this, so that you do not have to set up the target details from the beginning.

Use the Target Detail Template component to define and use enrollment management templates.

To create enrollment targets using a template:

1. Enter new target details.
2. Specify the detail from which you are copying.

This section discusses how to select the target information from the old detail.

Pages Used to Use Enrollment Management Target Templates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
New Target Detail	TARGET_DETAIL_NEW	Student Admissions > Enrollment Targets > Target Detail Template > New Target Detail	Create new enrollment management targets using the target template feature.
Copy Target Detail	TARGET_DETAIL_COPY	Student Admissions > Enrollment Targets > Target Detail Template > Copy Target Detail	Specify the target information you are copying from for the new detail target.

Selecting the Target Information from the Old Detail

Access the Copy Target Detail page (**Student Admissions > Enrollment Targets > Target Detail Template > Copy Target Detail**).

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

New Target Detail

Copy Target Detail

Target Sequence Nbr: 000000

Copy From

Detail Sequence:  Copy

Cohort: 1999 Academic Year


Population: Civil Engineering

Division: Latino

Copy to Detail Find | View All First ◀ 1 of 1 ▶ Last + -

Academic Institution:

Academic Career:

***Term:** 

<i>Field or Control</i>	<i>Description</i>
Detail Sequence	Select the detail sequence number of the detail from which you are copying. The system displays the corresponding cohort, population, and division, if applicable.
Term	Select the term for the new detail you are creating.

Field or Control	Description
Copy	Click to copy the detail template from the old to the new target.

After you save the page, you can display the new detail template and change only the items you have to for the new target, rather than recreating everything from scratch.

Generating Enrollment Management Reports

This section discusses how to generate three different enrollment management reports:

- Enrollment Target Cohort Table.
- Target Population Table.
- Target Division Table.

Pages Used to Generate Enrollment Management Reports

Page Name	Definition Name	Navigation	Usage
Enrollment Target Cohort	PRCSRUNCTL	Set Up SACR > Product Related > Recruiting and Admissions > Reports > Enrollment Target > Enrollment Target Cohort	Create a report listing the enrollment target cohort levels you have defined.
Enrollment Target Population	PRCSRUNCTL	Set Up SACR > Product Related > Recruiting and Admissions > Reports > Enrollment Target > Enrollment Target Population	Create a report listing the enrollment target population levels you have defined.
Enrollment Target Division	PRCSRUNCTL	Set Up SACR > Product Related > Recruiting and Admissions > Reports > Enrollment Target > Enrollment Target Division	Create a report listing the enrollment target division levels you have defined.

Loading and Assigning EPS Market Codes

Understanding EPS Market Codes

EPS™ (Enrollment Planning Service) is a geographic and demographic data service offered annually by the College Board to Colleges and Universities. EPS provides information to subscribing institutions about competitors, feeder schools, and demographic strengths and weaknesses. EPS market codes are proprietary market codes owned by the College Board and are used to categorize external organizations and people into geographical areas, mostly in the United States. Some admissions offices use EPS market codes to focus their recruiting efforts in geographic areas in which they believe they will be the most successful. Note that there is a license agreement that you must sign with the College Board to use the EPS geomarket data. However, an institution is not required to purchase EPS to use the PeopleSoft EPS market code functionality.

PeopleSoft Campus Solutions does not provide EPS data; however, it does provide an EPS market code load process and lets you automatically assign the market codes to external organizations.

Setting Up Code Types for EPS Organizations

This section discusses how to set up external organization code types.

Page Used to Set Up Code Types for EPS Organizations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Organization Code Type	EXTORGCDTYPE_TABLE	Campus Community > Organization > Define Organization Data > Ext Org Code Type Table > External Organization Code Type	Define an EPS market code organization code type. When you load EPS data, the EPS External Load process links the EPS data to the external organization code types that you define. Thus, you identify EPS data by the external organization code type to which you link the data.

Setting Up External Organization Code Types

Access the External Organization Code Type page (**Campus Community > Organization > Define Organization Data > Ext Org Code Type Table > External Organization Code Type**).

<i>Field or Control</i>	<i>Description</i>
Code Type Option	Select <i>EPS</i> if the external organization code type that you are adding is an EPS market code type. If the code you are adding is <i>not</i> an EPS market code, select <i>None</i> .

Loading EPS Market Codes

You can load EPS market codes via the EPS External Load Parms (EPS external load parameters) page. You can then view the load results and correct any errors. This section discusses how to run the EPS External Load process.

Page Used to Load the EPS Market Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EPS Load External Data	EPS_LOAD_PARMS	Campus Community > Organization > Organizations Data Load > EPS Load External Data	Run the process to load the EPS market codes for the external organization code type that you defined.

Running the EPS External Load Process

Access the EPS Load External Data page (**Campus Community** > **Organization** > **Organizations Data Load** > **EPS Load External Data**).

This example illustrates the fields and controls on the EPS Load External Data page. You can find definitions for the fields and controls later on this page.

EPS Load External Data

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

EPS Data Load Options

☒ Load EPS Data

EPS Code Type: QA1 QA1

Input File: \\MFONTAIN040502\TEMP\EPSSH97.dat

EPS Data Delete Options

☐ Delete EPS Data

☒ All

☐ Specific Type EPS Code Type:

EPS Data Load Options

<i>Field or Control</i>	<i>Description</i>
Load EPS Data	Select to <i>add</i> EPS data to your system. You must select either the Load EPS Data check box or the Delete EPS Data check box.
EPS Code Type	Select the EPS code type that you want to load. Only EPS code types that you defined on the Ext Org Code Type Table page are available for selection.
Input File	Enter the drive, directory, and filename path where the EPS market code external data resides.

EPS Data Delete Options

<i>Field or Control</i>	<i>Description</i>
Delete EPS Data	Select if you want to <i>delete</i> EPS data. You might perform this action, for example, if you want to remove the previous year's version of the EPS data.
All	Select to remove all EPS data.
Specific Type and EPS Code Type	Select Specific Type to delete a specific EPS data type. Then choose an EPS Code Type .

Click the **Run** button to run the EPS External Load process at user-defined intervals. The process name is CCEPSLOD and the process type is SQR Report.

Viewing EPS Load Results

This section discusses how to view the following data related to the EPS load process:

- Zip codes
- Market codes
- Error messages
- Suspense messages
- All messages

Pages Used to View EPS Load Results

Page Name	Definition Name	Navigation	Usage
EPS Zip to Market Code	EPS_ZIP_MRKT_TABLE	Campus Community > Organization > Define Organization Data > EPS Zip to Market Code	View the zip code that is related to the market code. After running the EPS Load External Data process, the EPS data is populated into the EPS Zip to Market Code table.
EPS Market Code Table	EPS_MRKT_CD_TABLE	Campus Community > Organization > Define Organization Data > EPS Market Code Table	View or update the EPS market codes that you loaded through the load process.
EPS Suspense Data	EPS_SUSP_DATA	Campus Community > Organization > Organization Data Load > EPS Suspense > EPS Suspense Data	View any error messages that may result from the EPS load process.
EPS Suspense Message	EPS_SUSP_MESSAGE	Campus Community > Organization > Organization Data Load > EPS Suspense > EPS Suspense Message	View the EPS suspense error messages.
EPS Messages	EPS_MESSAGE_TABLE	Campus Community > Organization > Organization Data Load > EPS Messages	View all of the messages generated by the EPS External Load process.

Viewing EPS Zip Codes Loaded Through the Load Process

Access the EPS Zip to Market Code page (**Campus Community > Organization > Define Organization Data > EPS Zip to Market Code**).

This example illustrates the fields and controls on the EPS Zip to Market Code page.

EPS Zip to Market Code

EPS Zip to Market

*Ext Org Code Type:

QA1

QA1

*Postal:

01000

*Market Name:

0AL-

*Market Code:

4Abb

Market codes can be linked to many external organization code types. You can view market code descriptions on the EPS Market Code Table page.

Viewing EPS Market Codes Loaded Through the Load Process

Access the EPS Market Code Table page (**Campus Community > Organization > Define Organization Data > EPS Market Code Table**).

Viewing EPS Load Process Error Messages

Access the EPS Suspense Data page (**Campus Community > Organization > Organization Data Load > EPS Suspense > EPS Suspense Data**).

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

EPS Suspense Data		EPS Suspense Message	
Ext Org Code Type:	NATIONAL	<input type="checkbox"/>	Delete
Record Nbr:	1		
Postal Place Indicator:	Add		
Postal:	01000		
Market Name:	0AL-		
Market Code:	4Abb		
<input checked="" type="checkbox"/>	Duplicate Ind		
Status			
<input type="radio"/>	OK to Purge	<input type="radio"/>	Completed
		<input checked="" type="radio"/>	Error

Field or Control	Description
Delete	Select to mark this suspense record for deletion. The system deletes the record when you run the EPS Purge Suspense File process.
Duplicate Ind (duplicate indicator)	The load process selects this check box when it finds a duplicate postal code, market name, and market code within the code type.

Status

Field or Control	Description
OK to Purge	Select to mark the record for purge. When you run the EPS Purge Suspense File process, this record is purged.

Field or Control	Description
Completed	The load process selects this option when the record has been successfully updated.
Error	The load process selects this option when it encounters an error, such as a duplicate. The system indicates duplicates by selecting the Duplicate Ind check box. You can decide whether to delete a duplicate record by selecting the Delete check box, or to ignore the duplication by clearing the Duplicate Ind check box.

Viewing EPS Suspend Messages

Access the EPS Suspend Message page (**Campus Community > Organization > Organization Data Load > EPS Suspend > EPS Suspend Message**).

This example illustrates the fields and controls on the EPS Suspend Message page.

EPS Suspend Data		EPS Suspend Message	
Ext Org Code Type:	NATIONAL	Postal Place Indicator:	Add
Postal:	01000	Record Nbr:	1
Message Details Find View All First 1 of 1 Last			
Run Date/Time:	09/20/2004 1:56:50PM	Process Instance:	276 + -
User ID:	PS	Process Name:	CCEPSLOD
Message Set Number:	14200	Message Number:	226
Message Severity:	Error		
Message Text:	Duplicate postal codes encountered in EPS input data.		
Description:	Duplicate data can result in incorrect data in the EPS Zip to Market Data table. Review the result and correct as necessary.		
Comments:	Postal Code: '01000' EPS Market Name: '0AL- ' EPS Market Code: '4Abb'		

Viewing All Messages Generated from Loading EPS Market Codes

Access the EPS Messages page (**Campus Community > Organization > Organization Data Load > EPS Messages**).

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

EPS Messages

Code Type:
Postal:
Process Instance:

Postal Place:
Record Nbr:

Message Details
Find | View All
First 1 of 1 Last

Record Nbr:
Run Date/Time:
User ID:
Postal:
Message Set Number:
Message Severity:
Message Text:
Description:
Comments:

Process Instance:
Process Name:
Message Number:
Postal Place:

Field or Control	Description
Code Type, Postal, Process Instance, Postal Place, and Record Nbr (record number)	Use these fields to narrow the selection of messages that you want to display.
Search	Click to display the messages based on your search.

Assigning EPS Market Codes to an Organization

This section discusses how to:

- Assign market codes.
- View and maintain the organization external codes.

Pages Used to Assign EPS Market Codes to an Organization

Page Name	Definition Name	Navigation	Usage
EPS Assign Organization	EPS_ASGN_ORG_PARMS	Campus Community > Organization > Organization Data Load > EPS Assign Organization	Assign EPS market codes to external organizations.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Organization Codes	EXT_ORG_CODES	Campus Community > Create/Maintain Organizations > External Organization Codes > External Organization Codes	Display the results of the automated EPS assignment process for a specific external organization. You can also use this page to maintain the EPS market code data for the institution.

Assigning Market Codes

Access the EPS Assign Organization page (**Campus Community > Organization > Organization Data Load > EPS Assign Organization**).

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

EPS Assign Organization

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

EPS Delete Option

☒ Delete EPS Data Type EPS Code Type: marjo

EPS Assign Option

☐ Assign EPS Data Type EPS Code Type:

Dup Org EPS Type Operation: ☒ Skip ☐ Replace

Org Selection Criteria

☐ Assign EPS Code to All Org School Type:

Address Selection

Country: State:

Postal Code

☐ Begins With ☐ Equals ☐ Range ☒ N/A

From: To Qty:

EPS Delete Option

<i>Field or Control</i>	<i>Description</i>
Delete EPS Data Type and EPS Code Type	Select to delete EPS data. Select the EPS code type to delete. Use this action, for example, to remove a prior year's version of the EPS data.

EPS Assign Options

<i>Field or Control</i>	<i>Description</i>
Assign EPS Data Type and EPS Code Type	Select to assign EPS data to organizations. Select the EPS code type to assign.
Skip	Select if you <i>do not</i> want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.
Replace	Select if you <i>do</i> want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.

Org Selection Criteria

<i>Field or Control</i>	<i>Description</i>
Assign EPS Code to All Org (assign enrollment planning service code to all organizations)	Select to assign EPS market codes to all external organizations. If you select this check box, the School Type field and the fields in the Address Selection group box become unavailable for input.
School Type	Select the school type to which you want to assign EPS market codes. If you want to select organizations by using the address fields below, do not select the Assign EPS Code to All Org check box. Instead, select a school type (such as <i>Secondary</i>).

Address Selection

Use this group box to assign EPS market codes to organizations based on address criteria.

<i>Field or Control</i>	<i>Description</i>
Country and State	Enter the country and state to select external organizations.

Postal Code

Use this group box if you want to select external organizations from a certain postal code or postal code range. Select the appropriate option depending on how you want to select by postal code. Select one option only.

Field or Control	Description
Begins With	<p>Select to choose an organization by a beginning postal code. Enter the beginning postal code in the From field.</p> <p>For example, suppose that one organization has had a 5-digit postal code entered (90068) and one organization has a 9-digit version of the postal code entered (90068-6328). Using a postal code that begins with 90068 will find both organizations.</p>
Equals	<p>Select to choose an organization by a specific postal code. Enter the postal code in the From field.</p>
Range	<p>Select to choose an organization by a postal code range. Enter the beginning postal code in the From field and the ending postal code in the To field.</p>
N/A	<p>Select if you do not want to use postal codes in your selection criteria for the organization. This is the default setting.</p>


Click the **Run** button to run the EPS Assign Organization process at user-defined intervals.

Viewing and Maintaining the Organization External Codes


Access the External Organization Codes page (**Campus Community > Create/Maintain Organizations > External Organization Codes > External Organization Codes**).

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

External Organization Codes

Org ID: 000010021 Williamsport High School


Organization Code Types Find | View All First 1 of 1 Last

***Ext Org Code Type:** 

EPS Information

EPS Postal Code:

EPS Market Code:

EPS Market Name:

<i>Field or Control</i>	<i>Description</i>
Ext Org Code Type (external organization code type)	Enter the external organization code type. If this external organization code type is an EPS code type, then the EPS Postal Code field becomes available for selection (if the external organization code type is not an EPS code type, then the EPS Postal Code field displays but you cannot edit or change this field).
EPS Postal Code	Enter the EPS postal code. You can change this field no matter what the assignment process did.
EPS Market Code and EPS Market Name	After you enter an EPS postal code, the system displays the EPS Market Code and EPS Market Name from the setup tables. This data cannot be changed on this page.

Purging EPS Market Codes

This section discusses how to purge EPS suspense files.

Page Used to Purge EPS Market Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EPS Purge Suspense File	EPS_PURGE_PARMS	Campus Community > Organization > EPS Purge Suspense File	Purge EPS code records from the suspense file. You can purge all EPS codes or a specific type.

Purging EPS Suspense Files

Access the EPS Purge Suspense File page (**Campus Community > Organization > EPS Purge Suspense File**).

This example illustrates the fields and controls on the EPS Purge Suspense File page. You can find definitions for the fields and controls later on this page.

EPS Purge Suspense File

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

EPS Code Type

☐ All Type
☒ Specific Type Purge Code Type:

Purge Suspense Record Status

☐ All
☐ OK to Purge
☐ Completed
☐ Error

EPS Code Type

Use this group box to select the EPS market code records that you want to purge from the suspense file.

Field or Control	Description
All Type	Select to purge all EPS market code type records from the suspense file.
Specific Type and Purge Code Type	Select to purge only a specific EPS market code type record from the suspense file. Use Purge Code Type to choose an EPS market type.

Purge Suspense Record Status

Use this group box to select the type of messages that you want to remove. You must choose at least one.

Field or Control	Description
All	Select to remove all suspense records, regardless of their status.
OK to Purge	Select to remove all suspense records with a status of <i>OK to Purge</i> .

<i>Field or Control</i>	<i>Description</i>
Completed	Select to remove all suspense records with a status of <i>Completed</i> .
Error	Select to remove all suspense records with a status of <i>Error</i> .

Click the **Run** button to run the EPS Purge Program process at user-defined intervals.

Deleting Prospect and Applicant Information

Understanding the Prospect Delete and Application Delete Processes

You can only delete prospect records and applications for which you have appropriate recruiting center and application center security.

See "Understanding Recruiting and Admissions Security" (Campus Solutions Application Fundamentals).

You can delete prospect records and applications:

- Individually
- In a group

Use the group delete process to delete groups of prospect records or applications that you no longer want to keep in your database—for example, once a semester, you might delete all prospect records that are five years old and for which no application exists. You might use the individual delete process at the end of each day, to delete prospect records or applications entered in error.

You can delete *all* academic career information for prospects or applicants or only information for a *specific* academic career, when multiple careers exist. In either case, the processes delete prospect or applicant data from all tables in which the data resides.

You also have the option to delete the communications, checklists, and comments (3Cs) associated with the prospect record or application.

Before running the delete process, you can access the holding table to remove records that you no longer want to delete or to change the 3Cs that you want to delete.

Important! The Prospect Delete and Application Delete processes are designed strictly as cleanup tools. They are *not* to be used to delete an ID from the database. PeopleSoft Campus Community has the ID Delete function for that task.

How Prospect Delete and Application Delete Relate to ID Delete

Although the Prospect Delete and Application Delete processes remove prospect records and applications from database tables, the identification number and personal data still remain in the system. If you need to delete this information, use the ID Delete functionality.

The ID Delete process, because of its primary objective to maintain referential integrity, searches for the presence of critical data in high-level tables before it deletes individual identification numbers. If it

finds no data for the identification number, it proceeds with the deletion. However, if it does find data, it cancels the deletion and displays a message of explanation.

The Prospect Delete and Application Delete processes prepare records for ID Delete when:

- No other prospect record or application exists.
- No student record exists for a matriculated applicant or active student.
- No student financial record exists.

When you create prospect records and applications, the system writes a corresponding row to the STDNT_CAREER table for each career of the prospect or applicant. The STDNT_CAREER table is one of the control tables that the ID Delete process searches before it deletes an identification number. To ensure that you can delete an identification number after a corresponding prospect record or application is deleted, the Prospect Delete and Application Delete processes check for critical data elements to determine if the identification number for the prospect or applicant meets certain conditions. If the identification number meets those conditions and if it meets all the requirements of the ID Delete feature, then the processes delete the identification number from the STDNT_CAREER table and the identification number becomes eligible for ID delete.

Likewise, when your institution processes application fees and enrollment deposits, the system writes a corresponding row to the ITEM_SF table, and this data flows up to the ACCOUNT_SF table (one of the four control tables in the ID Delete feature). In the ITEM_SF table, the Applicant Delete process changes the **Application Number Deleted** field from *No*, the default, to *Yes*.

The Prospect Delete and Application Delete processes remove data from the ID Delete control tables only if the data came from Recruiting and Admissions processes. They do not remove data that originated from other applications in PeopleSoft Campus Solutions.

Related Links

"Deleting Individual IDs" (Campus Community Fundamentals)

Common Elements Used to Delete Prospect and Applicant Information

This section lists common elements.

3Cs

You can delete the 3C information that is associated with prospect and application records.

<i>Field or Control</i>	<i>Description</i>
Delete Communications, Delete Checklists, and Delete Comments	<p>Select the appropriate check boxes to delete any associated 3Cs that are assigned to prospect or application records.</p> <p>Only 3Cs with the administrative functions PSSV, PROS, or PROP for prospect records and ADMA or ADMP for applications, where the variable data matches the prospect or application record, will be deleted.</p>

By Population

The **By Population** group box appears when the Population Selection process is selected. The population selection process is a method for selecting the IDs to process for a specific transaction. The **By Population** group box functions in the same way as the **Population Selection** group box, which is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction.

Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process, and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.


If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See "Understanding the Population Selection Group Box" (Campus Community Fundamentals).

Field or Control	Description
Selection Tool	Select a tool to create the group of prospect records that you want to delete. Values are: <i>Equation Engine</i> , <i>External File</i> , and <i>PS Query</i> . The fields in this group box change depending on your selection.
Query Name	<p>A number of queries are delivered with the PS Query tool. If you run queries other than those that are delivered, you must include the appropriate bind record in your query or it will not appear when you select the prompt to view the available queries.</p> <p>The bind record for prospect delete is SAD_PRS_DEL_BND. Your query must also contain the following values: EMPLID, INSTITUTION and ACAD_CAREER.</p> <p>The bind record for application delete is SAD_APP_DEL_BND. Your query must also contain the following values: EMPLID and ADM_APPL_NBR.</p> <p>Click the Preview Selection Results link to verify that the records that you selected are the ones that you want to delete. Click the Run button to insert the records into the Prospect Delete Holding table or into the Application Delete Holding table.</p>

Adding Multiple Rows

Save data entry time by adding multiple rows.

<i>Field or Control</i>	<i>Description</i>
	Click to add multiple rows. Unused rows are deleted when you save.

Deleting Prospect Records

This section discusses how to:

- Select individual prospect records to delete.
- Select a group of prospect records to delete.
- View the Prospect Delete Holding (ADM_PRS_DEL_SUSP) table.
- Run the Prospect Delete SQR (ADPRSDEL) process.

Pages Used to Delete Prospect Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Delete Prospect Record	SAD_PRS_DELETE	Student Recruiting > Delete Prospects > Delete Prospect Record	Select individual prospect records for deletion.
Prospect Delete by Batch	SAD_PRS_DEL_BATCH	Student Recruiting > Delete Prospects > Prospect Delete by Batch	Select a group of prospect records for deletion.
Prospect Delete Holding	ADM_PRS_DEL_SUSP	Student Recruiting > Delete Prospects > Prospect Delete Holding	Review the prospect records that you selected for deletion and remove any that you no longer want to delete.
Prospect Delete Process	ADM_PRSP_DEL_PARMs	Student Recruiting > Delete Prospects > Prospect Delete Process	Run the Prospect Delete process.

Selecting Individual Prospect Records to Delete

Access the Delete Prospect Record page (**Student Recruiting > Delete Prospects > Delete Prospect Record**).

This example illustrates the fields and controls on the Delete Prospect Record page: Prospect tab. You can find definitions for the fields and controls later on this page.

Delete Prospect Record								
Choose Prospects to be Deleted								
Prospect Prospect Details 3Cs								
	ID	Name	*Academic Institution	*Academic Career	Delete Communications	Delete Checklists	Delete Comments	
1	AD5220	Martha Wright	PSU	Undergrad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
2	AD5028	Alex Smith	PSU	Graduate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
3	AD5028	Alex Smith	PSU	Undergrad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -

Enter a value in the **ID** field. If only one prospect record exists, the institution and career will appear automatically. If a prospect has multiple institution or career records, you must enter a row for each record that you want to delete.

For each prospect record, select the 3Cs, if any, that you want to delete.

Prospect Details

Select the Prospect Details tab.

This example illustrates the fields and controls on the Delete Prospect Record page: Prospect Details tab. You can find definitions for the fields and controls later on this page.

Delete Prospect Record								
Choose Prospects to be Deleted								
Prospect Prospect Details 3Cs								
	Recruiting Center	Admit Term	Admit Type	Application On File	Admission Data Creation Date			
1	Undergraduate	0450	FYR	<input checked="" type="checkbox"/>	03/02/2001	+	-	
2	Graduate - Central	0450	FYR	<input checked="" type="checkbox"/>	03/23/2001	+	-	
3	Undergraduate	0450	FYR	<input checked="" type="checkbox"/>	03/23/2001	+	-	

View additional information about the records that you have selected on this page.

When you save this page, the selected records are inserted into the Prospect Delete Holding table, where they are stored until you run the Prospect Delete process. If you enter an ID for a prospect for which a record already exists in the holding table, you will receive an error message and will not be able to add the prospect.

Selecting a Group of Prospect Records to Delete

Access the Prospect Delete by Batch page (**Student Recruiting > Delete Prospects > Prospect Delete by Batch**).

This example illustrates the fields and controls on the Prospect Delete by Batch page. You can find definitions for the fields and controls later on this page.

Prospect Delete by Batch

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

By Population

☒ Population Selection

Selection Tool: PS Query

Query Name: QA_CS_AD_PS_PROSDEL_01 [Launch Query Manager](#) [Preview Selection Results](#)

3C PROS/PROP/PSSV Delete Optns

☒ Communications

☒ Checklists

☒ Comments

3C PROS/PROP/PSSV Delete Optns (3C PROS/PROP/PSSV delete options)

Select the 3Cs, if any, that you want to delete. Your selection will apply to all prospect records in the group. You can update the 3C information for individual records in the group by accessing the Prospect Delete Holding table after you run the process.

Running the Process

Click **Run** to run the Prospect Delete by Batch Application Engine (SAD_PRS_DEL) process using the PeopleSoft Process Scheduler. This process inserts all the selected records into the Prospect Delete Holding table if they do not already exist there.

Once the process runs successfully, view the message log to confirm how many records were selected (SAD_PRS_DEL_TGT) and how many records were inserted into the holding table (ADM_PRS_DELC).

Viewing the Prospect Delete Holding Table

Access the Prospect Delete Holding page (**Student Recruiting > Delete Prospects > Prospect Delete Holding**).

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

Prospect Delete Holding

Andy Dentury 0092

Academic Institution: PeopleSoft University [Prospect Data](#)

Academic Career: Undergraduate

☒ Delete Checklists

☒ Delete Comments

☒ Delete Communications

[Remove From Holding Table](#)

The Prospect Delete Holding table contains all the records that you have selected for deletion, whether individually or in a group. Review these records before you run the Prospect Delete process.

You can:

- Use the check boxes to select different 3C options for a prospect.
- Click the **Remove From Holding Table** button to remove a record from the holding table if you no longer want to delete that record.

Click the **Prospect Data** link to access the Create/Update Prospects component, where you can view additional prospect information and determine whether to remove a record from the holding table.

Running the Prospect Delete Process

Access the Prospect Delete Process page (**Student Recruiting > Delete Prospects > Prospect Delete Process**).

Click **Run** to run the Prospect Delete process using the PeopleSoft Process Scheduler. This process deletes all the records in the Prospect Delete Holding table.

Technical Information

To prepare records for the optional ID Delete process, the Prospect Delete process analyzes whether data should be deleted from the STDNT_CAREER table as follows:

- The process evaluates the ADM_APPL_DATA table for each prospect, searching for an application record in the academic career corresponding to the prospect record.
 - If the process finds an application, then it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as an applicant, with the academic institution.

The prospect does not qualify for ID Delete.

- If the process does not find an application, then it evaluates the ACAD_PROG table.
- The process evaluates the ACAD_PROG table for each prospect, searching for a student record in the academic career and academic program corresponding to the prospect record.
 - If the process finds a student record, it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as a student, with the academic institution.

The prospect does not qualify for ID delete.

- If the process does not find a student record, it deletes the row containing the prospect's EMPLID and ACAD_CAREER from the STDNT_CAREER table.

The prospect meets both conditions and *might* qualify for ID deletion.

Deleting Applications

This section lists prerequisites and discusses how to:

- Select individual applications to delete.
- Select a group of applications to delete.
- View the Application Delete Holding (ADM_APP_DEL_SUSP) table.
- Run the Application Delete SQR (ADAPPDEL) process.

Prerequisites

Before you can delete an application:

1. Select **Records and Enrollment > Career and Program Information > Student Program/Plan**.
2. On the Student Program page, make sure that the applicant is not an active student in the academic career corresponding to the application.

If the applicant has matriculated, delete the student records for the academic career and academic program corresponding to the application. Scroll to find and delete *only* the rows that correspond to the same academic career and academic program as the current application.

If the applicant matriculated in multiple academic programs in the same academic career and one of them is valid, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID deletion because the applicant still has a relationship, as a student, in another academic program within the institution.

3. Select **Student Admissions > Application Maintenance > Maintain Applications > Application Program Data**.
4. On the Application Program Data page, determine whether the applicant has another application in the same academic career corresponding to this application but in a different academic program.

If the applicant has another application in the academic career, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID deletion because the applicant still has a relationship, as an applicant, in another academic program within the institution.

Note: If a prospect record exists for the applicant, the applicant does not qualify for subsequent ID deletion because the applicant has a relationship, as a prospect, with the institution.

Pages Used to Delete Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Delete an Application	SAD_APP_DELETE	Student Admissions > Application Delete > Delete an Application	Select individual applications for deletion.

Page Name	Definition Name	Navigation	Usage
Application Delete by Batch	SAD_APP_DEL_BATCH	Student Admissions > Application Delete > Application Delete by Batch	Select a group of applications for deletion.
Application Delete Holding	ADM_APP_DEL_SUSP	Student Admissions > Application Delete > Application Delete Holding	Review the application records that you selected for deletion and remove any that you no longer want to delete.
Application Delete Process	ADM_APPL_DEL_PARMs	Student Admissions > Application Delete > Application Delete Process	Run the Application Delete process.

Selecting Individual Applications to Delete

Access the Delete an Application page (**Student Admissions** > **Application Delete** > **Delete an Application**).

This example illustrates the fields and controls on the Delete an Application page: Application tab. You can find definitions for the fields and controls later on this page.

Field or Control	Description
ID	Enter the ID of the person for whom you want to delete an application.
Application Number	After you enter the ID, select the application that you want to delete.
Application Data	Click this link to access the Maintain Applications component in a new window.
Delete Communications Delete Checklists and Delete Comments	For each application, select the 3Cs, if any, that you want to delete.

Application Details

Select the Application Details tab.

This example illustrates the fields and controls on the Delete an Application page: Application Details tab. You can find definitions for the fields and controls later on this page.

Academic Career	Academic Institution	Application Center	Admit Type	Created On
1 Undergraduate	PeopleSoft University	Undergraduate	First-Year	12/11/2002

View further information about the records that you have selected.

When you save the page, the selected records are inserted into the Application Delete Holding table, where they are stored until you run the Application Delete process. If you enter an ID and Application Number for an application for which a record already exists in the holding table, you will receive an error message and you will not be able to add the application.

Selecting a Group of Applications to Delete

Access the Application Delete by Batch page (**Student Admissions > Application Delete > Application Delete by Batch**).

This example illustrates the fields and controls on the Application Delete by Batch page. You can find definitions for the fields and controls later on this page.

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

By Population

☒ Population Selection

Selection Tool: PS Query

Query Name: QA_CS_AD_PS_APPDEL_01 [Launch Query Manager](#) [Preview Selection Results](#)

3C ADMA/ADMP Delete Options

☒ Communications

☒ Checklists

☒ Comments

3C ADMA/ADMP Delete Options

Select the 3Cs, if any, that you want to delete. Your selection will apply to all application records in the group. You can update 3C information for individual records in the group by accessing the Application Delete Holding table after you run the process.

Running the Process

Click **Run** to run the Application Delete by Batch Application Engine (SAD_APP_DEL) process using the PeopleSoft Process Scheduler. This process inserts all the selected records into the Application Delete Holding table if they do not already exist there.

Once the process runs successfully, view the message log to confirm how many records were selected (SAD_APP_DEL_TGT) and how many records were inserted into the holding table (ADM_APP_DELC).

Viewing the Application Delete Holding Table

Access the Application Delete Holding page (**Student Admissions > Application Delete > Application Delete Holding**).

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

Application Delete Holding

Application Number:	00024171	Application Data
EmplID:	SEV0605	
Name:	Mildred Pierce	
Academic Institution:	PeopleSoft University	
Academic Career:	Undergraduate	
Application Center:	Undergraduate	
Admit Type:	First-Year	
	<input checked="" type="checkbox"/> Delete Communications	
	<input checked="" type="checkbox"/> Delete Checklists	
	<input checked="" type="checkbox"/> Delete Comments	

Remove From Holding Table

The Application Delete Holding table contains all the records that you have selected for deletion, whether individually or in a group. Review these records before you run the Application Delete process.

You can:

- Use the check boxes to select different 3C options for an application.
- Click the **Remove From Holding Table** button to remove a record from the holding table if you no longer want to delete that record.

Click the **Application Data** link to access the Maintain Applications component, where you can view additional applicant information and determine whether to remove a record from the holding table.

Running the Application Delete Process

Access the Application Delete Process page (**Student Admissions > Application Delete > Application Delete Process**).

Click **Run** to run the Application Delete process using the PeopleSoft Process Scheduler. All application records will be deleted from the holding table.

Technical Information

To prepare records for the optional ID Delete process, the Application Delete process analyzes whether data should be deleted from the ID Delete control tables:

- The process evaluates the ACAD_PROG table for each applicant, searching for a student record in the academic career corresponding to the application.
 - If the process finds a student record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a student, with the academic institution. Therefore, the applicant does not qualify for ID deletion.
 - If the process does not find a student record, then it evaluates the ADM_APPL_PROG table.
- The process evaluates the ADM_APPL_PROG table for each applicant, searching for another application in the academic career corresponding to the application record.
 - If the process finds another application, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant still has a relationship, as an applicant, with the academic institution. Therefore, the applicant does not qualify for ID deletion.
 - If the process does not find an application, then it evaluates the ADM_PRSPCT_CAR table.
- The process evaluates the ADM_PRSPCT_CAR table for each applicant, searching for a prospect record in the academic career corresponding to the application record.
 - If the process finds a prospect record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a prospect, with the academic institution. Therefore, the applicant does not qualify for ID deletion.
 - If the process does not find a prospect record, it deletes the row containing the applicant's EMPLID, ACAD_CAREER, and CAR_REQ_TERM from the STDNT_CAREER table.
- The process updates the **Application Number Deleted** field in the ITEM_SF table from *N*, the default, to *Y*.
- Data in the ITEM_SF table flows up to the ACCOUNT_SF table.

Producing a Year to Year Comparison Report

Running the Admissions Funnel Report Process

PeopleSoft delivers an Admissions Funnel report that you can use to report on your prospect and applicant numbers across one or multiple terms. Using this process, you can produce a year-to-year demographic comparison report. You can run the Admissions Funnel report in multiple formats showing varied data, depending on your criteria. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, and academic program. You can also include a comparison of terms on this report. The report calculates numeric and percentile representations of these comparisons.

This section discusses how to run Admissions Funnel reports.

Page Used to Run the Admissions Funnel Report Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Admissions Funnel Report - Parameters	RUNCTL_ADFUNNEL	Student Admissions > Reports > Admissions Funnel Report > Parameters	Run a demographic funnel report.

Related Links

[Recruiting and Admissions Reports: A-Z](#)

Running Admissions Funnel Reports

Access the Admissions Funnel Report - Parameters page (**Student Admissions > Reports > Admissions Funnel Report > Parameters**).

This example illustrates the fields and controls on the Admissions Funnel Report - Parameters page. You can find definitions for the fields and controls later on this page.

Parameters

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

Report Request Parameters

*Institution: PSUNV PeopleSoft University ☐ Create Compare Report

*Report Grouping: Also By Country/State ☐ Show Term Detail

Address Type for Country/State: HOME Home

All Terms for Academic Year: 2003

Admit Term

[Find](#) | [View All](#) First 1-2 of 11 Last

0470	2002 FICl	
0475	2002 Fall	

Define the data that you want to appear in your report in the Report Request Parameters section.

Field or Control	Description
Report Grouping	Group the data on your report. The default is to group the report by at least the application type and status (<i>Only by Application Type, Status</i>). However, you can select a different option to group the report by other criteria in addition to application type and status. For example, if you select <i>Also by Application Method</i> , then the report will be grouped by application type, status, and application method. Values for this field are delivered with your system as translate values. You can modify these translate values but you may also need to modify the report according to the translate values added. Values are <i>Only by Application Type, Status, Also by Application Method, Also by Ethnicity, Also by Event Type, Also by Gender, Also by Program, Also by Region, and Also by State</i> .
Create Compare Report	Select if you want to compare terms on this report. When this check box is selected, additional fields appear on the screen enabling you to select additional terms. If you want to report on only one term, clear this check box.
Regulatory Region	Select the Regulatory Region to determine which Ethnic Groups to display in the report. The field will display when the Report Grouping of <i>Also by Ethnicity</i> is selected.
Show Term Detail	Select if you want to view the set of terms and details regarding those terms. You can view details of up to five terms. If you have selected more than five terms and you select this check box, you will receive an error message. Clear this check box if you want to view your data in one group.

Field or Control	Description
Address Type for Country/State	This field appears when you select <i>Also By Country/State</i> in the Report Grouping field. Select the address type that you want the system to use when grouping the report data.
All Terms for Academic Year	Select the year for which you want to run the report. When you select an academic year, the admit terms defined for that year automatically appear. You can remove any of these terms. You must select a year for the Admissions Funnel Report process to run successfully.
All Terms in Comparison Year	If you are running a comparison report, select the year to which you are comparing.
Admit Term	The system populates the admit terms based on the year you selected in the All Terms for Academic Year . You can add and delete the admit terms. However, you must select at least one admit term for the Admissions Funnel Report process to run successfully.
Comparison Admit Term	After you select a comparison year, the admit terms defined for that year automatically appear. You can remove any of these terms.

Chapter 45

Recruiting and Admissions Reports

Recruiting and Admissions Reports: A-Z

This table lists the Recruiting and Admissions reports, sorted by report ID.

See the product documentation for *PeopleTools: Process Scheduler*

Report ID and Report Name	Description	Navigation	Run Control Page
ADAVGCUT Average Cutoff Report	Enables you to assess an evaluated applicant pool to determine the admissions averages that drive certain program actions. (SQR)	Student Admissions > Reports > Average Cutoff Report	RUNCTL_ADAVGCUT
ADFUNNEL Admissions Funnel	Lists prospect and applicant numbers across one or multiple terms. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, and academic program (SQR).	Student Admissions > Reports > Admissions Funnel Report	RUNCTL_ADFUNNEL

Recruiting and Admissions Reports: Selected Reports

This section provides detailed information about individual reports including important fields and tables accessed.

ADAVGCUT

Field or Control	Description
Institution	Enter the institution name.
Academic Program	Enter the academic program for which you want to generate an average cutoff report.

Field or Control	Description
Admit Term	Enter the admit term for which you want to generate an average cutoff report.

Running the process creates a file called `adavgcut.lis`. Use this file to view the output.

Note: If you enter an academic program and admit term combination that is not set up in the Average Cutoff Table page, you receive a blank report.

ADFUNNEL

Define the data that you want to appear in your report in the Report Request Parameters section.

Field or Control	Description
Report Grouping	Group the data on your report. The default is to have the report grouped by at least the application type and status (<i>Only by Application Type, Status</i>). However, you can select a different option to group the report by other criteria in addition to application type and status. For example, if you select <i>Also by Application Method</i> , then the report will be grouped by application type, status, and application method. Values for this field are delivered with your system as translate values. You can modify these translate values but you may also need to modify the report according to the translate values added. The delivered values are <i>Only by Application Type, Status, Also by Application Method, Also by Ethnicity, Also by Event Type, Also by Gender, Also by Program, Also by Region, and Also by Country/State</i> .
Create Compare Report	Select if you want to compare terms on this report. After this check box is selected, additional fields appear on the screen enabling you to select additional terms. If you want to report on only one term, clear this check box.
Regulatory Region	Select the Regulatory Region to determine which Ethnic Groups to display in the report. The field will display when the Report Grouping of 'Also by Ethnicity' is selected.
Show Term Detail	Select if you want to see the set of terms and details regarding those terms. You can view details of up to five terms. If you have selected more than five terms and you select this check box, you will receive an error message. Clear this check box if you prefer to see your data in one group.
Address Type for Country/State	This field appears when you select <i>Also By Country/State</i> in the Report Grouping field. Select the address type that you want the system to use when grouping the report data.

<i>Field or Control</i>	<i>Description</i>
All Terms for Academic Year	Select the year for which you want to run the report. After you select an academic year, the admit terms defined for that year automatically appear. You can remove any of the terms that you do not want to see. You must select a year for the Admissions Funnel Report process to run successfully.
All Terms in Comparison Year	If you are running a comparison report, select the year to which you are comparing.
Admit Term	The system populates the admit terms based on the year you selected in the All Terms for Academic Year . You can add and delete the admit terms if you want. However, you must select at least one admit term for the Admissions Funnel Report process to run successfully.
Comparison Admit Term	After you select a comparison year, the admit terms defined for that year automatically populate these fields. You can remove any of the terms you do not want to see.

