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# PeopleSoft Campus Solutions 9.2: Recruiting and Admissions

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# Preface

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## 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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
<b>Key+Key</b>	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 <b>Alt+W</b> , hold down the <b>Alt</b> key while you press the <b>W</b> 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.



<b>Typographical Convention</b>	<b>Description</b>
⇒	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.

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## PeopleSoft CS Related Links

[Hosted Online Help Home](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

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## Contact Us



Send your suggestions to [psft-infodev\\_us@oracle.com](mailto:psft-infodev_us@oracle.com).

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

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## Follow Us

<i>Icon</i>	<i>Link</i>
	<a href="#">Watch PeopleSoft on YouTube</a>

<b>Icon</b>	<b>Link</b>
	<a href="#">Follow @PeopleSoft_Info on X.</a>
	<a href="#">Read PeopleSoft Blogs</a>
	<a href="#">Connect with PeopleSoft on LinkedIn</a>



# 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:

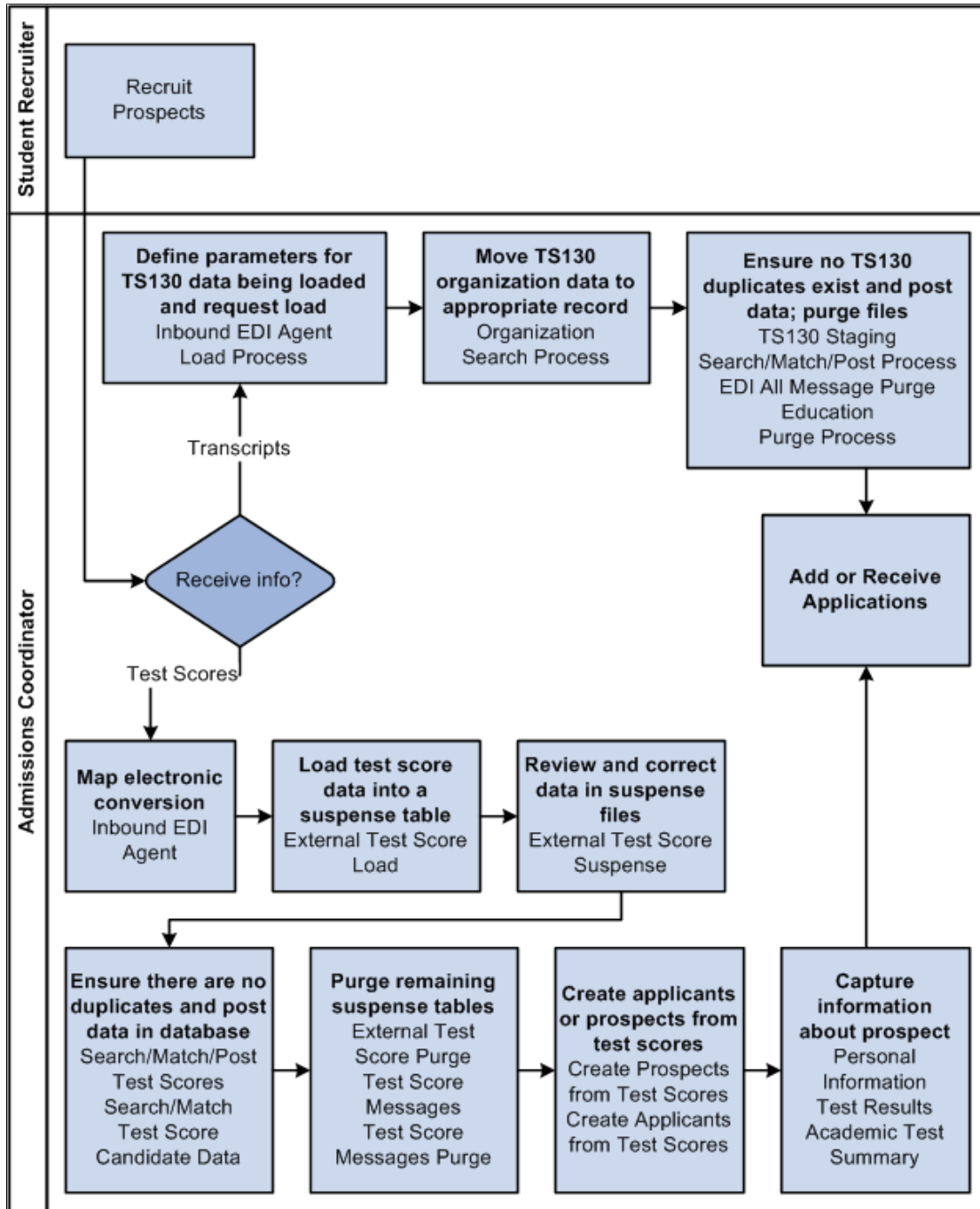
- Capture student recruiting information and analyze recruiting activities.
- Tailor your admissions system according to your requirements and practices.
- Set enrollment targets, track progress toward recruiting efforts, and analyze admissions decisions and patterns.

---

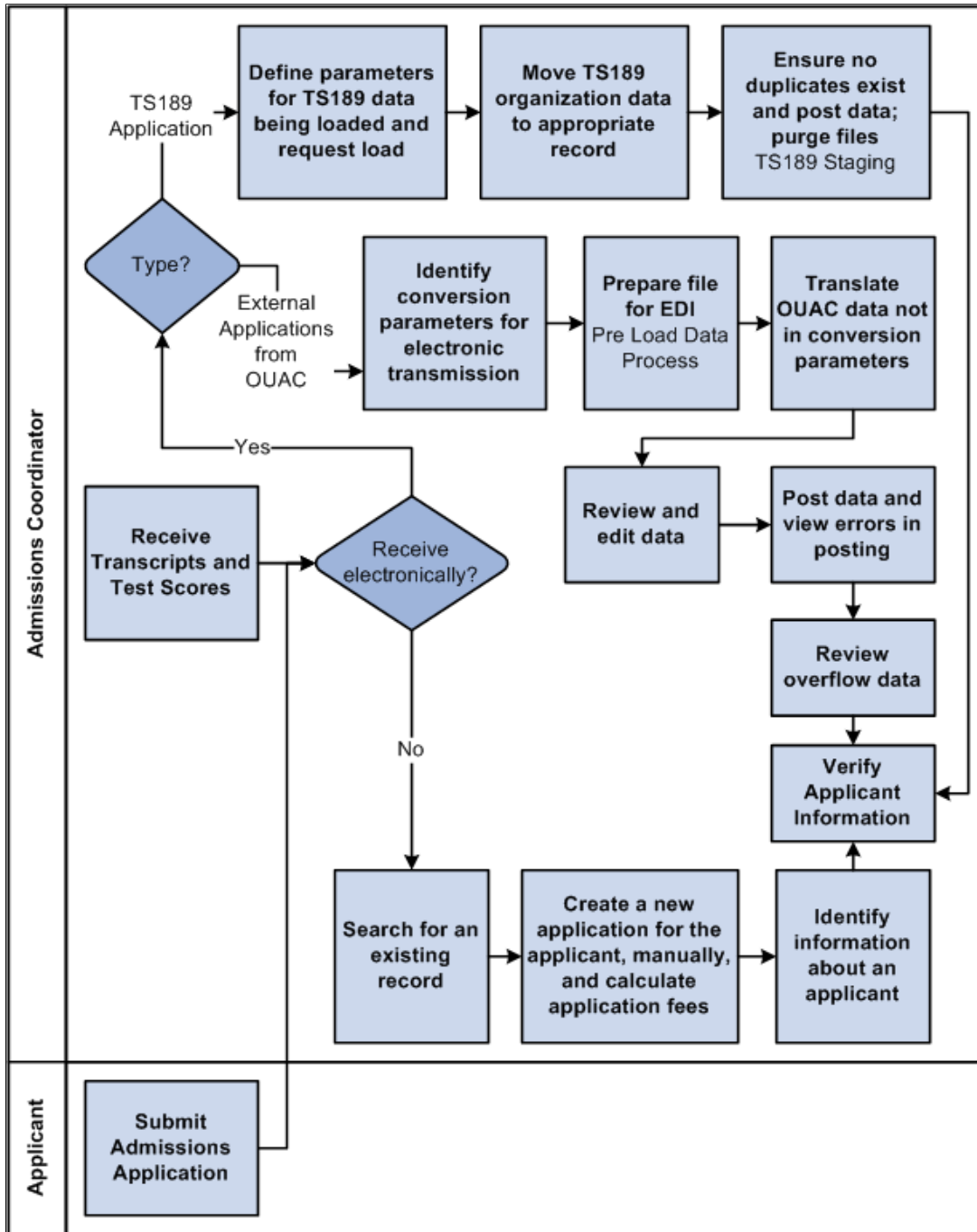
## Recruiting and Admissions Business Processes

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

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



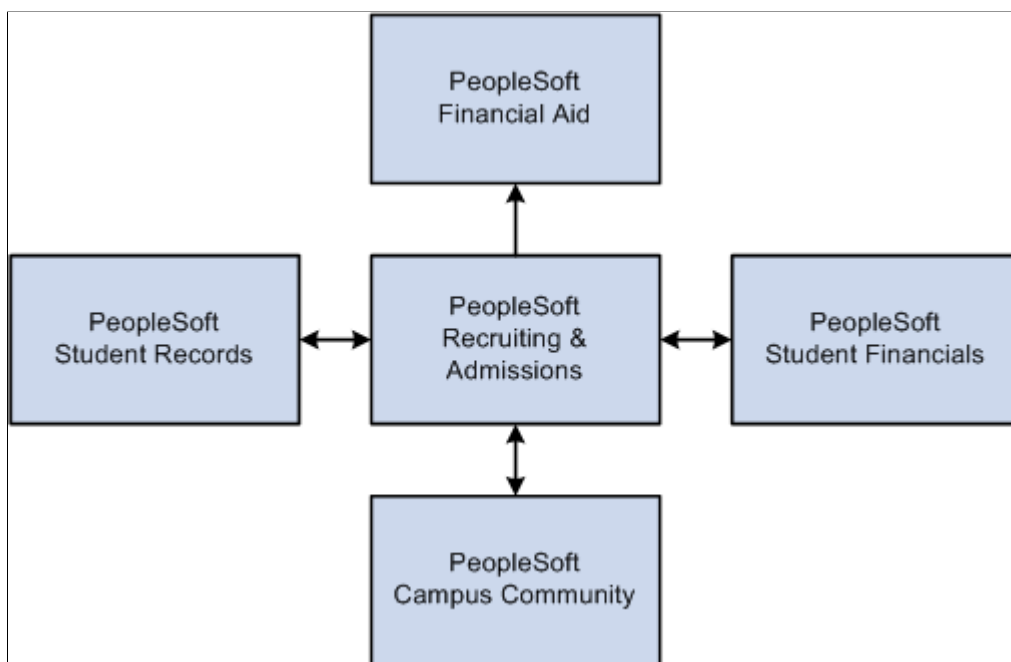
This diagram illustrates the add or receive applications business process.



## 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:

<b>Component</b>	<b>Component Interface</b>	<b>References</b>
CRS_MAJOR_CODE	SAD_CRS_MAJOR_CODE	See <a href="#">Defining and Reviewing External Data Setup Tables</a> .

### 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospect/Applicant Recruiting &gt; Region Table</b>	Define the geographic regions that your academic institution uses for recruiting and admissions.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Region Postal Table	REG_POSTAL_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospect/Applicant Recruiting &gt; Region Postal Table</b>	<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	<b>Student Recruiting &gt; Student Recruiters &gt; Region SetID Effdt Update</b>	Run the Region SetID Effdt Update process, which activates region trees.
Recruiting Category Table	RECRUIT_CAT_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospect/Applicant Recruiting &gt; Recruiting Category Table</b>	Set up your recruiting categories.
Recruiting Center Table	ADM_RECRCR_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospects &gt; Recruiting Center Table</b>	Create the admission recruiting centers for your institution.
Application Fee Waiver Basis	SAD_FEE_WVR_BAS	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; Application Fee Waiver Basis</b>	Set up basis codes for AAWS application fee waiver.
Application Center Table	ADM_APPLCTR_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; Application Center Table</b>	Set up your application centers.
Academic Shift Mapping	SAD_SHIFT_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; Academic Shift Mapping</b>	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.

**Tree Manager**

**SetID:** GLAKE      **Last Audit:** Valid Tree

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

**Tree Name:** REGION      Recruiting Regions

[Save As](#)   [Close](#)      [Tree Definition](#)   [Display Options](#)   [Print Format](#)

[Collapse All](#) | [Expand All](#)      [Find](#)      First Page   8 of 8   Last Page

- 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**).

<b>Field or Control</b>	<b>Description</b>
<b>As Of Date</b>	Enter a date equal to the effective date of the region tree.
<b>Institution</b>	Enter the institution for which the region tree will be used.
<b>SetID for Region</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Recruitment Group</b>	Assign the recruiting category to a recruitment group. Values are <i>Academic, Alumni, Athletics, Music, Region,</i> and <i>Special</i> . Recruitment groups are delivered with your system as translate values. You can modify these translate values. <hr/> <b>Important!</b> Do not change or delete the translate value <i>Region</i> . It is required for automated region and recruiter assignment. <hr/>
<b>Move to Application</b>	Select to copy this recruiting information to the application record when the prospect who is assigned to this category becomes an applicant.
<b>Academic Career Indicator</b>	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 <b>Academic Career</b> field.



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

<i>Field or Control</i>	<i>Description</i>
<b>Academic Career</b>	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:**

*Waiver Basis Code	Description		
1 CEEB	The College Board Fee Waiver	<input type="button" value="+"/>	<input type="button" value="-"/>

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.

<b>Field or Control</b>	<b>Description</b>
<b>Academic Career</b>	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.
<b>Application Fee Code</b>	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.
<b>Deposit Fee Code</b>	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.
<b>Calculate Deposit Fee in Batch</b>	<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.

<b>Field or Control</b>	<b>Description</b>
<b>SF Merchant ID and SF eCheck Merchant ID</b>	<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>
<b>When is Fee Payment Required</b>	<p>If you select <b>Pay Later</b>, 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>
<b>Allow Application Fee Waiver</b>	<p>If you select <b>Yes</b>, the <b>Valid Waiver Basis Codes</b> group box and <b>Application Fee Waiver Process</b> fields become available.</p>
<b>Valid Waiver Basis Codes</b>	<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>

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

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

Find
First
1-2 of 2
Last

<b>*Academic Shift:</b>	day shift	<b>Total Seats:</b>	40	+ -
<b>*Academic Shift:</b>	Night	<b>Total Seats:</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Recruiters	RECRUITERS	<b>Student Recruiting</b> > <b>Student Recruiters</b> > <b>Create/Update Recruiters</b> > <b>Recruiters</b>	Designate a person as a recruiter or to update a recruiter's information.
Recruiter Categories	RECRUITER_RCR_CAT	<b>Student Recruiting</b> > <b>Student Recruiters</b> > <b>Create/Update Recruiters</b> > <b>Recruiter Categories</b>	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	<b>Student Recruiting</b> > <b>Student Recruiters</b> > <b>Create/Update Recruiters</b> > <b>Recruiter Regions</b>	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	<b>Student Recruiting</b> > <b>Student Recruiters</b> > <b>Create/Update Recruiters</b> > <b>Recruiter Centers</b>	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	<b>Student Recruiting</b> > <b>Student Recruiters</b> > <b>Create/Update Recruiters</b> > <b>Recruiter Programs</b>	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
<b>Recruiter Type</b>	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.
<b>Recruiter Role</b>	Select one or more recruiter roles for this person. In our example, John Chavez is both an evaluator and an interviewer. Add as many recruiter roles as are relevant to this person. A recruiter can recruit for more than one career. Add the recruiter again, only select the relevant academic career when prompted.  Recruiter roles are delivered with your system as translate values. You can modify these translate values.

## Assigning Recruiters to Recruiting Categories

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



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.

The screenshot shows a web interface for 'Recruiter Categories'. At the top, there are navigation tabs: 'Recruiters', 'Recruiter Categories' (selected), 'Recruiter Regions', 'Recruiter Centers', and 'Recruiter Programs'. Below the tabs, the following information is displayed:

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

Below this is a summary section with a search bar and navigation controls (Find | View All First 1 of 1 Last):

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

At the bottom is a table with columns for 'Category', 'Group', and '\*Assignment Stage'. The table contains three rows:

Category	Group	*Assignment Stage
BKBL Basketball	Athletics	Prospect/Applicant
REGN Region	Region	Prospect/Applicant
TRFL Track & Field	Athletics	Prospect/Applicant

Field or Control	Description
<b>Category</b>	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.
<b>Group</b>	The group to which this category belongs.
<b>Assignment Stage</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Stage</b>	Select the stage of recruitment in which this recruiter is involved for this region. Values are <i>Applicant</i> , <i>Prosp/Appl</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.
<b>Region</b>	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.
<b>Include/Exclude</b>	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.  <b>Note:</b> First add the regions where this person recruits. Then, if you must exclude the person from certain areas, add those rows last.

<b>Field or Control</b>	<b>Description</b>
<b>External Org ID</b> (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><b>Note:</b> Be aware that you can only exclude or include a school (in the <b>External Org ID</b> field) from a region if the <b>Region</b> 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 <b>External Org ID</b> field.</p>
<b>Include/Exclude</b>	The display-only <b>Include/Exclude</b> field (next to the <b>External Org ID</b> field) automatically contains the opposite value of that entered in the <b>Include/Exclude</b> field (below the <b>Region</b> 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.

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## Associating Recruiters with Recruiting and Application Centers

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

<b>Field or Control</b>	<b>Description</b>
<b>Recruiting Center</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Application Center</b>	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.

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**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.

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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.

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

## Chapter 3

# Setting Up Prospects

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## 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	<b>Set Up SACR &gt; Install &gt; Admissions Installation</b>	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.

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

### From Prospect to Application

<i>Field or Control</i>	<i>Description</i>
<b>Copy Data</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Update Data</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Create Prospect</b>	Select this check box to create a retroactive prospect record for an applicant. You must have selected the <b>Update Data</b> 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 <b>Applied</b> 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.
<b>Recruiting Status and Referral Source</b>	If you selected the <b>Create Prospect</b> 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.

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



<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Institution, Career, Program, Admit Term</b>	<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

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Free Form Institution</b>	<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 <a href="#">Updating Applications</a>.</p>

## Academic Interest

<b>Field or Control</b>	<b>Description</b>
<b>Use Priority</b>	<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 <a href="#">Prerequisites for Tracking Supporting Prospect and Applicant Information</a></p>

## Last School Attended

<b>Field or Control</b>	<b>Description</b>
<b>Warn for Last School Attended</b>	<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>
<b>Duplicate Course Warning</b>	<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>
<b>Fluid Self Service</b>	<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)

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospect/ Applicant Recruiting &gt; Admit Type Table</b>	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>
<b>Academic Career</b>	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.
<b>Readmit Processing Required</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospects &gt; Referral Source Table</b>	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	<b>Set Up SACR &gt; Common Definitions &gt; External Education &gt; School Type Table</b>	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>
<b>Advisement School Type</b>	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.
<b>Use Within Student Response</b>	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.
<b>Canadian School Govt Class</b> (Canadian school government class)	This field only appears if your system installation country equals <i>CAN</i> . In order to report the correct value for the school type, select a Canadian classification value.  Use the values to define the schools type. Values are <i>Elementary</i> , <i>Post Sec</i> , <i>Secondary</i> , <i>University</i> , and <i>Unknown</i> . These values are delivered as translate values. You can change them.

<i>Field or Control</i>	<i>Description</i>
<b>(AUS) DEEWR Credit Basis</b>	<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 <b>DEST, HECS, Centrelink, TAC (Department of Education, Science and Training, Higher Education Contribution Scheme, Centrelink, Tertiary Admissions Centre)</b> check box is selected on the SA Features page.</p>
<b>(AUS) DEEWR Provider Type VET</b>	<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 <b>DEST, HECS, Centrelink, TAC</b> 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	<b>Set Up SACR &gt; Product Related &gt; Campus Community &gt; Define Campus Community &gt; Setup &gt; Extracurricular Activity Table</b>	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 31    **\*Status:** Active + -

**\*Description:** Archery

**Short Description:** Archery

**\*Activity Type:** Athletics

**Activity Offering**

**Internal and External**   
  **Internal**   
  **External**

**Extra Activity Primacy:**

<i>Field or Control</i>	<i>Description</i>
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.

<i>Field or Control</i>	<i>Description</i>
<b>Internal and External</b>	The activity is offered by your institution and by an external organization. These activities are available in Recruiting and Admissions and PeopleSoft Student Records.
<b>Internal</b>	The activity is offered by your institution only. These activities are available only in Student Records.
<b>External</b>	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>
<b>Extra Activity Primacy</b>	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	<b>Set Up SACR &gt; Product Related &gt; Campus Community &gt; Define Campus Community &gt; Setup &gt; Honors and Awards Table</b>	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>
<b>Internal/External</b>	Select a value to indicate whether this award or honor is internal or external to your institution.



<b>Field or Control</b>	<b>Description</b>
<b>Grantor</b>	Enter a grantor if one is associated with this award.
<b>Transcript Level</b>	<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 <b>Internal/External</b> 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>

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

<b>Field or Control</b>	<b>Description</b>
<b>Formal Description</b>	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	<b>Set Up SACR &gt; Product Related &gt; Student Records &gt; Student Standing and Awards &gt; Student Group Table</b>	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	<b>Set Up SACR &gt; Common Definitions &gt; External Education &gt; External Summary Type Table</b>	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

Page Name	Definition Name	Navigation	Usage
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:   \*Status:

\*Description:

\*Short Description:

GPA Values Find | View All First 1 of 1 Last

*External GPA	*Description	Short Desc

## 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.

<i>Field or Control</i>	<i>Description</i>
<b>External GPA</b>	Enter the external GPA value for each GPA value.
<b>Short Description</b>	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

\*Effective Date: 01/01/1900

**GPA Conversion Rules**

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	+ -

<i>Field or Control</i>	<i>Description</i>
<b>Effective Date</b>	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.
<b>Converted GPA</b>	Enter the converted GPA that applies to the range entered in the <b>From GPA</b> and <b>To GPA</b> fields.

<i>Field or Control</i>	<i>Description</i>
<b>From GPA</b> and <b>To GPA</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Material Type Table</b>	View material types and their material data.
Material Type Field Usage	MATL_TYPE_SP	Click the <b>Material Data</b> 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Material Group Table</b>	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.

<b>Material Type Table</b>			
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>			
		First  1-9 of 10  Last	
<b>Material Type</b>	<b>Description</b>	<b>General Material</b>	
AUD	Audition	<input checked="" type="checkbox"/>	<a href="#">Material Data</a>
CRS	External Courses	<input type="checkbox"/>	Material Data
ESS	Essay	<input checked="" type="checkbox"/>	<a href="#">Material Data</a>
INT	Interview	<input checked="" type="checkbox"/>	<a href="#">Material Data</a>
POR	Portfolio	<input checked="" type="checkbox"/>	<a href="#">Material Data</a>
REC	Recommendation	<input checked="" type="checkbox"/>	<a href="#">Material Data</a>
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*.

<b>Field or Control</b>	<b>Description</b>
<b>General Material</b>	<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>
<b>Material Data</b>	<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.

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

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:

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

<b>Material Type Values</b>	<b>General Material?</b>
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 31 **\*Status:** Active + -

**\*Description:** Graduate Auditions

**Short Description:** Grd Audtns

Find | View All First 1 of 1 Last

**Material Type**

AUD Audition + -

<b>Field or Control</b>	<b>Description</b>
<b>Material Type</b>	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

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## 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.

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

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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.

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

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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).

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

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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.

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**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.

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See “Campus Self Service Overview” (Campus Self Service )

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospects &gt; Web Prospect Create Table</b>	Enable or disable Request Information self-service transaction segments and prospect career fields.
Web Prospect Setup 2	ADM_WEB_PRS2_TBL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Prospects &gt; Web Prospect Create Table &gt; Web Prospect Setup 2</b>	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 for 'Web Prospect Setup'. It has two tabs: 'Web Prospect Setup' (selected) and 'Web Prospect Setup 2'. Below the tabs are two sections:

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

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:** A dropdown menu for '\*Data Source:' is set to 'Web'.
- Institution Setup Parameters:**
  - \*Academic Institution: Text input 'GLAKE' with a search icon, displaying 'Great Lakes University' with '+' and '-' buttons.
  - \*Recruiting Status: Dropdown menu set to 'Applicant'.
  - \*Referral Source: Text input 'EVNT' with a search icon, displaying 'Campus Event' with '+' and '-' buttons.
- Career Setup Parameters:**
  - \*Academic Career: Text input 'UGRD' with a search icon, displaying 'Undergraduate' with '+' and '-' buttons.
  - \*Recruiting Center: Text input 'UCTR' with a search icon, displaying 'University Recruiting Center'.
  - Allow Prospect To Select Comm: Text input for 'Event ID:' with a search icon.
  - Send Default Communication: Text input for 'Event ID:' with a search icon.

### Acad Int/Test Results Defaults

<i>Field or Control</i>	<i>Description</i>
<b>Data Source</b>	<i>Web</i> 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>
<b>Academic Institution</b>	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 <b>Academic Institution</b> 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.
<b>Recruiting Status</b>	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.
<b>Referral Source</b>	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>
<b>Academic Career</b>	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.
<b>Recruiting Center</b>	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.

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

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Prospects by Category - Select Search Criteria	SS_ADM_PRS_REQ_CAT	<b>Self Service &gt; Student Recruiting &gt; View Prospects by Category</b>	Recruiting officers use this page to search for prospects by category.
Prospects by Category - Search Results	SS_ADM_PRS_SUM_CAT	Click the <b>Search</b> 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 <b>Program Detail</b> 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	<b>Self Service &gt; Student Recruiting &gt; View Prospects by Organization</b>	Recruiting officers use this page to search for prospects by organization.
Prospects by Organization - Search Results	SS_ADM_PRS_SUM_ORG	Click the <b>Search</b> 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 <b>Org Primary Location</b> 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"> <li>• <b>Outreach &gt; Recruiting Officer &gt; Home &gt; Recruiting &gt; By Region</b></li> <li>• <b>Self Service &gt; Student Recruiting &gt; View Prospects By Region</b></li> </ul>	Recruiting officers use this page to search for prospects by region.
Prospects by Region - Search Results	SS_ADM_PRS_SUM_REG	Click the <b>Search</b> button on the Prospects by Region - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Applicants by Category - Select Search Criteria	SS_ADM_APP_REQ_CAT	<ul style="list-style-type: none"> <li>• <b>Outreach &gt; Recruiting Officer &gt; Home &gt; Recruiting &gt; By Category</b></li> <li>• <b>Self Service &gt; Student Recruiting &gt; View Applicants By Category</b></li> </ul>	Recruiting officers use this page to search for applicants by category.
Applicants by Category - Search Results	SS_ADM_APP_SUM_CAT	Click the <b>Search</b> 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 <b>Program Detail</b> 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 <b>Application Status</b> 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	<b>Self Service &gt; Student Recruiting &gt; View Prospects by Category &gt; View Applicants By Org</b>	Recruiting officers use this page to search for applicants by organization.
Applicants by Organization - Search Results	SS_ADM_APP_SUM_ORG	Click the <b>Search</b> 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	<b>Self Service &gt; Student Recruiting &gt; View Applicants By Region</b>	Recruiting officers use this page to search for applicants by region.
Applicants by Region - Search Results	SS_ADM_APP_SUM_REG	Click the <b>Search</b> 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

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## 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.

<b>Field or Control</b>	<b>Definition</b>
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.

<b>Field or Control</b>	<b>Definition</b>
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.

<b>Field or Control</b>	<b>Definition</b>
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.

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**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.

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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\_APPWITHDRW\_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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
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

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

## Chapter 6

# Using Admission Applications Web Services

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## 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:

<b>Service Operation</b>	<b>Description</b>
SAD_CREATEAPP	Create admission application
SAD_SAVEAPPL	Save admission application
SAD_SUBMITAPPL	Submit admission application
SAD_GETAPPLS	Get admission applications

<b>Service Operation</b>	<b>Description</b>
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):

<b>Service Operation</b>	<b>Description</b>
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.

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

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

<b><i>Service Operation</i></b>	<b><i>Description</i></b>
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*

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## 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.

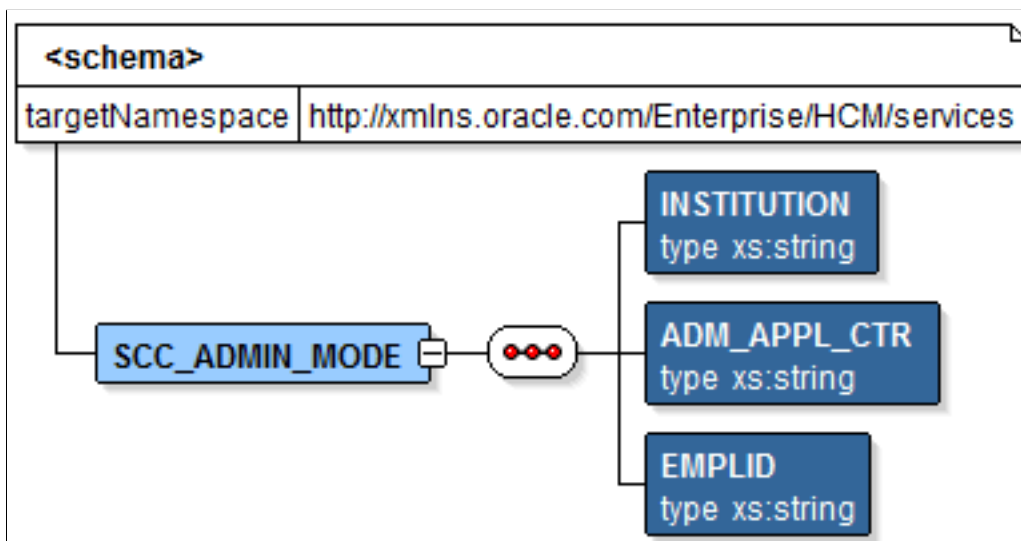
In the Administrator mode, the user must provide an institution and application center to create an application. The system enforces application center and academic structure security for the administrative user.

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

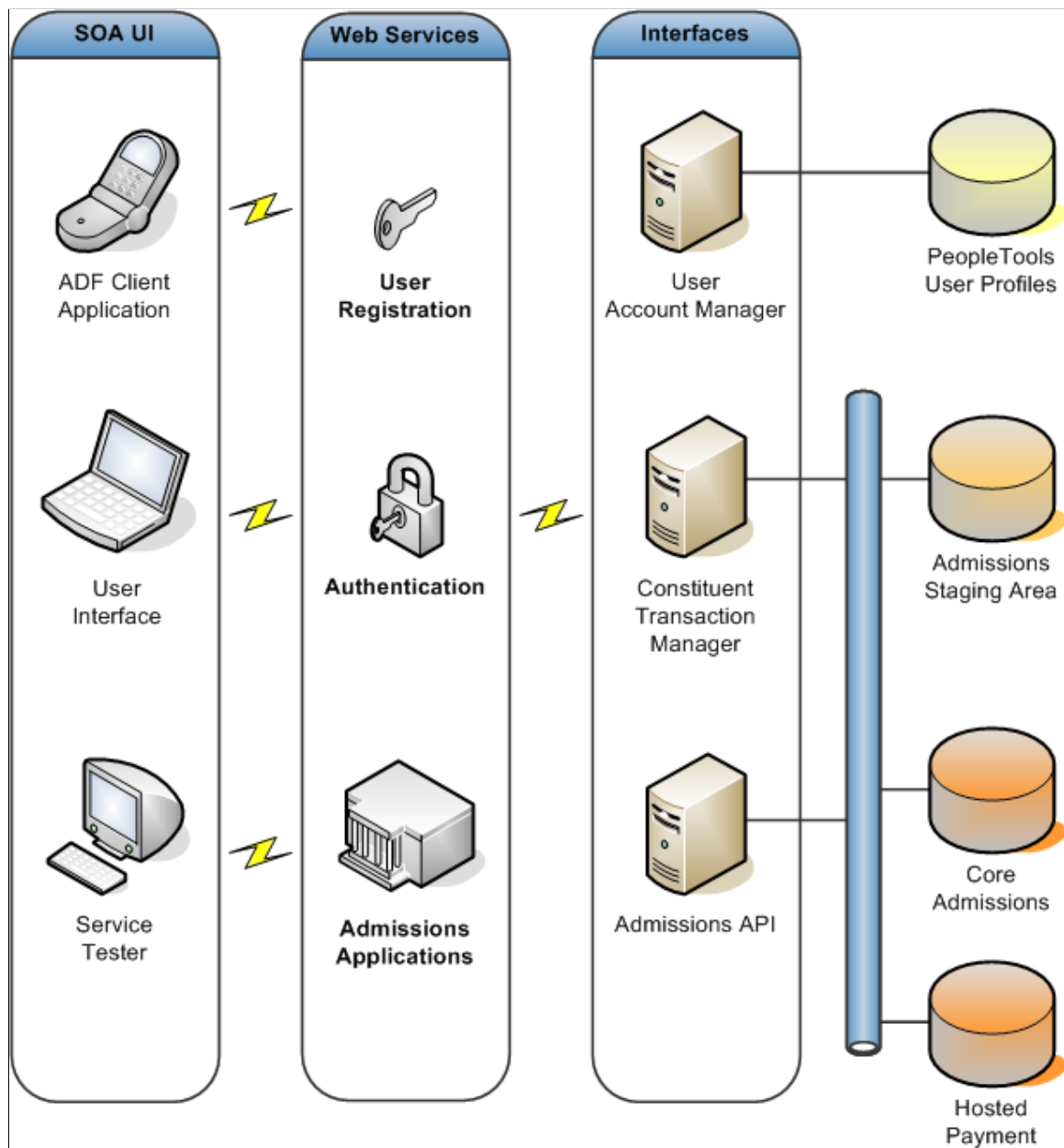
AAWS interacts with the following Campus Solutions components:

- 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:IdentityManager`. 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.

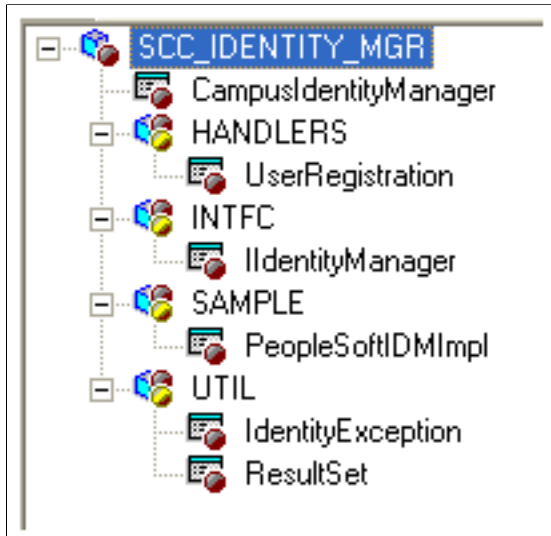


## User Account Manager

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.

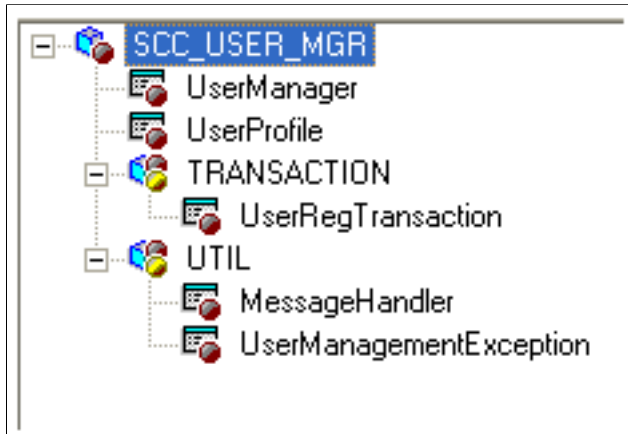
The User Account Manager component contains a number of sub-modules including the Campus Identity Manager and the User Manager. The following graphics show the core application packages and classes which support the User Account Manager:

This image illustrates the Campus Identity Manager.



<b>Class</b>	<b>Description</b>
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.



<b>Class</b>	<b>Description</b>
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.

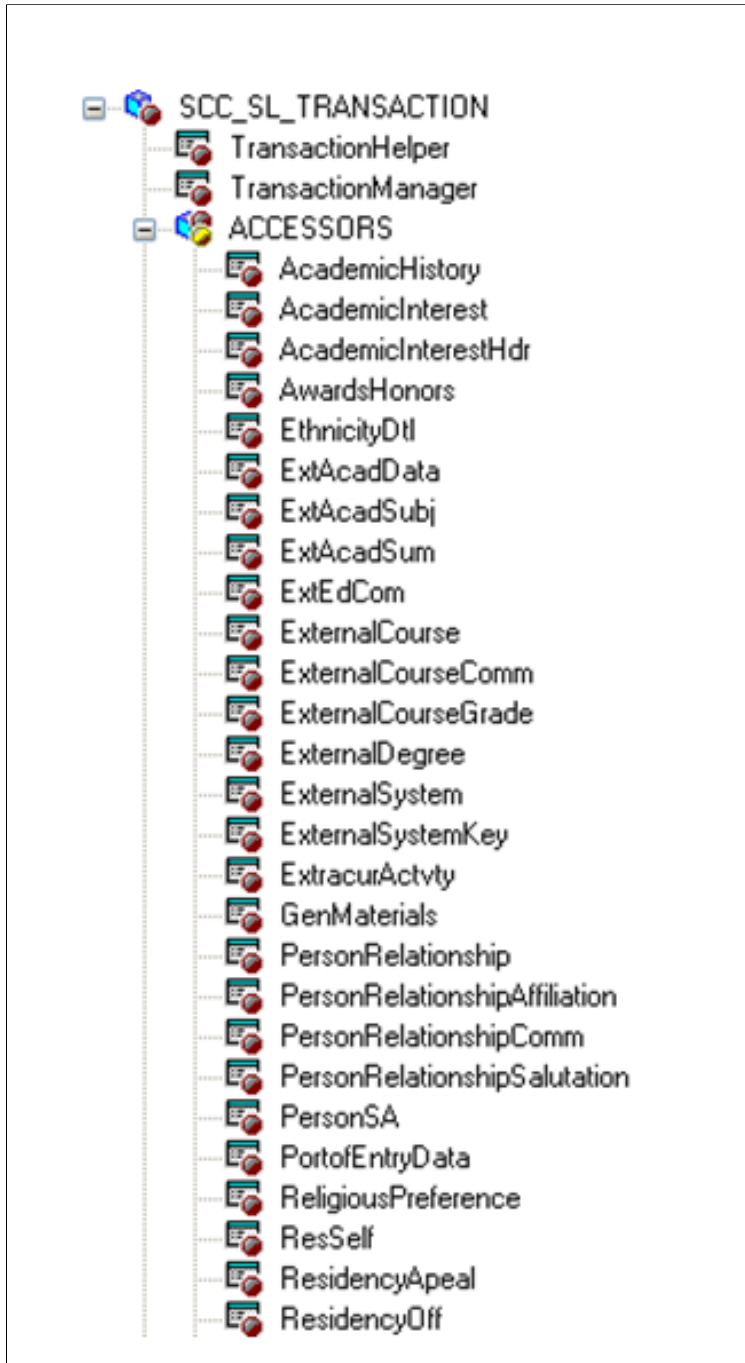
## Constituent Transaction Manager

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.

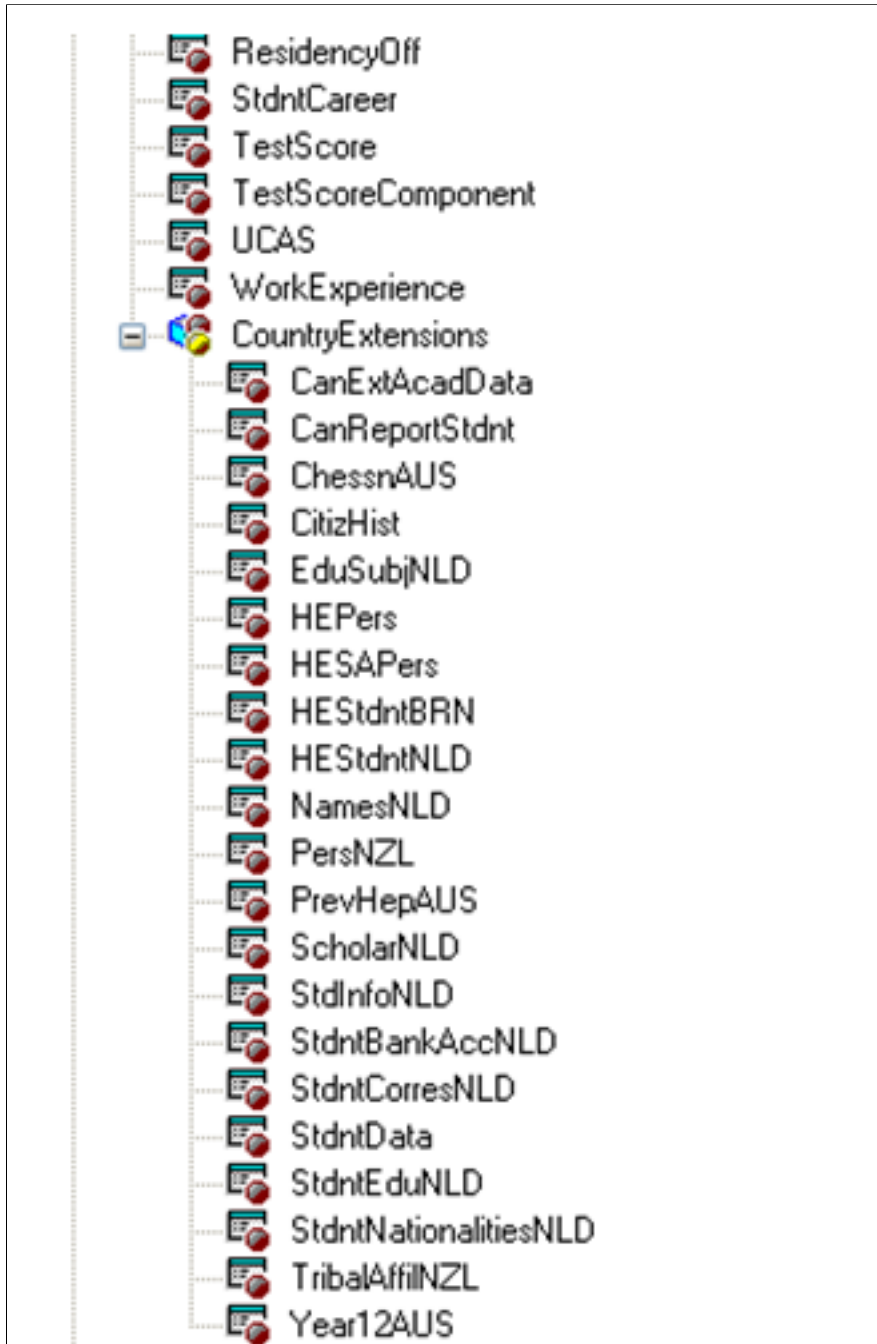
Constituent Transaction Manager is composed of a number of application classes and PeopleTools components which support the staging and loading of constituent (applicant) and related transaction (application) data into staging tables.

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

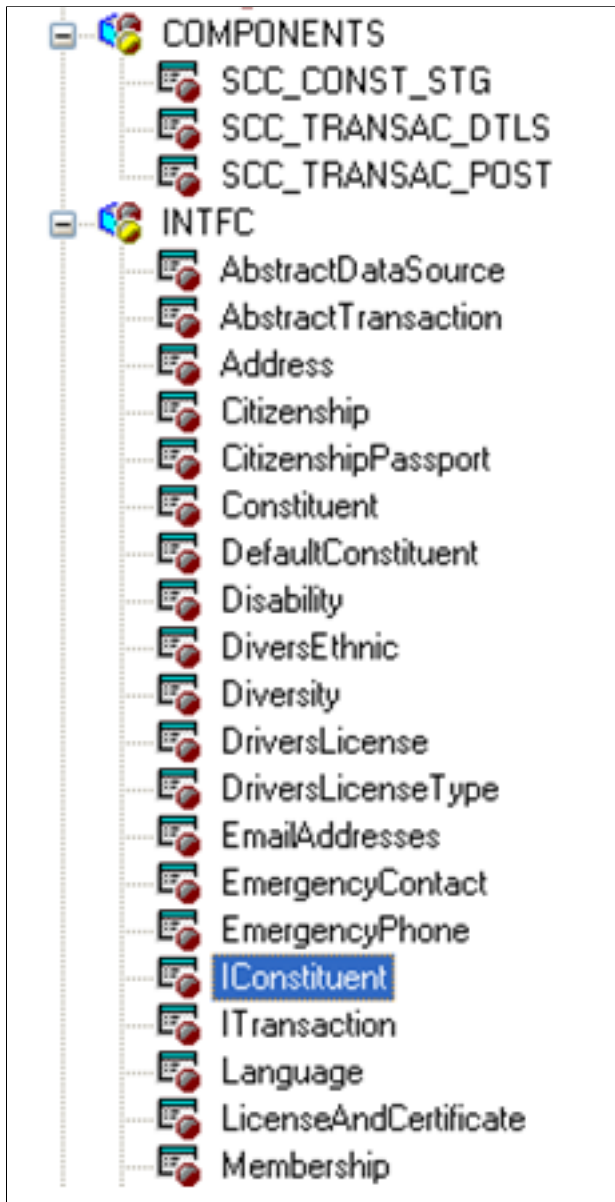
This image illustrates the Constituent Transaction Manager (1 of 4).



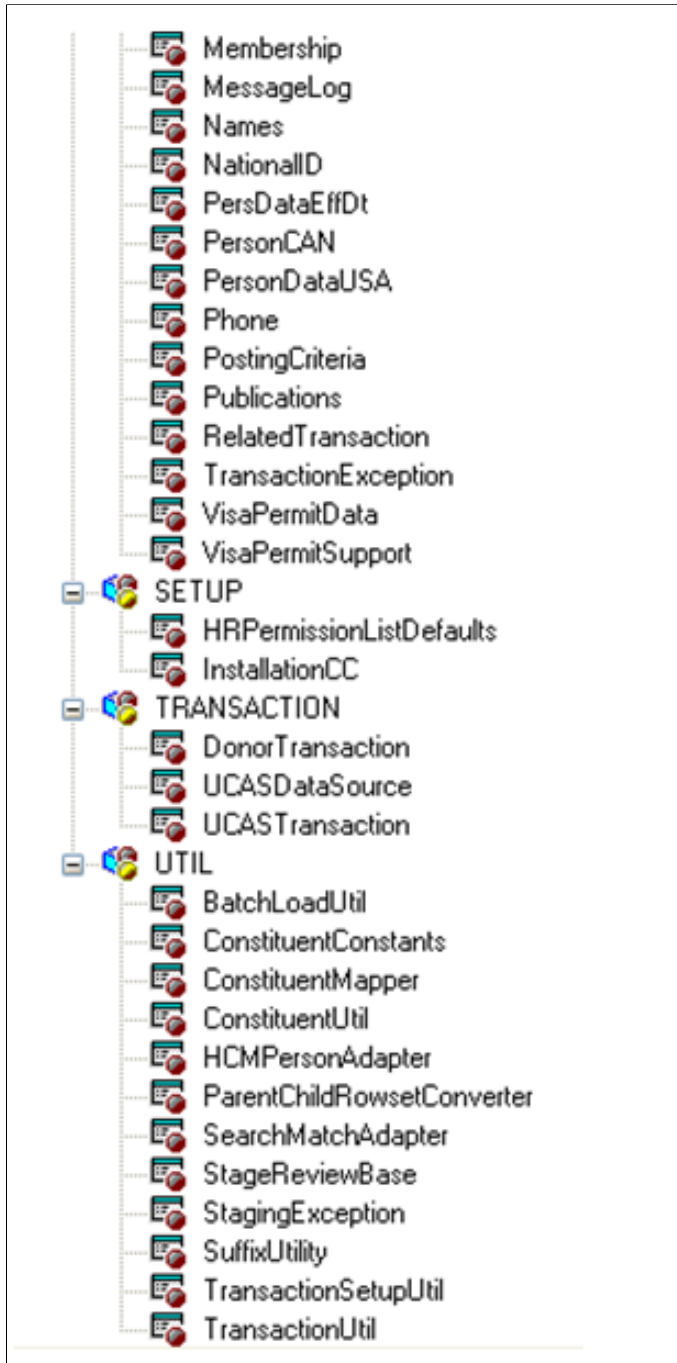
This image illustrates the Constituent Transaction Manager (2 of 4).



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



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



## Admissions API

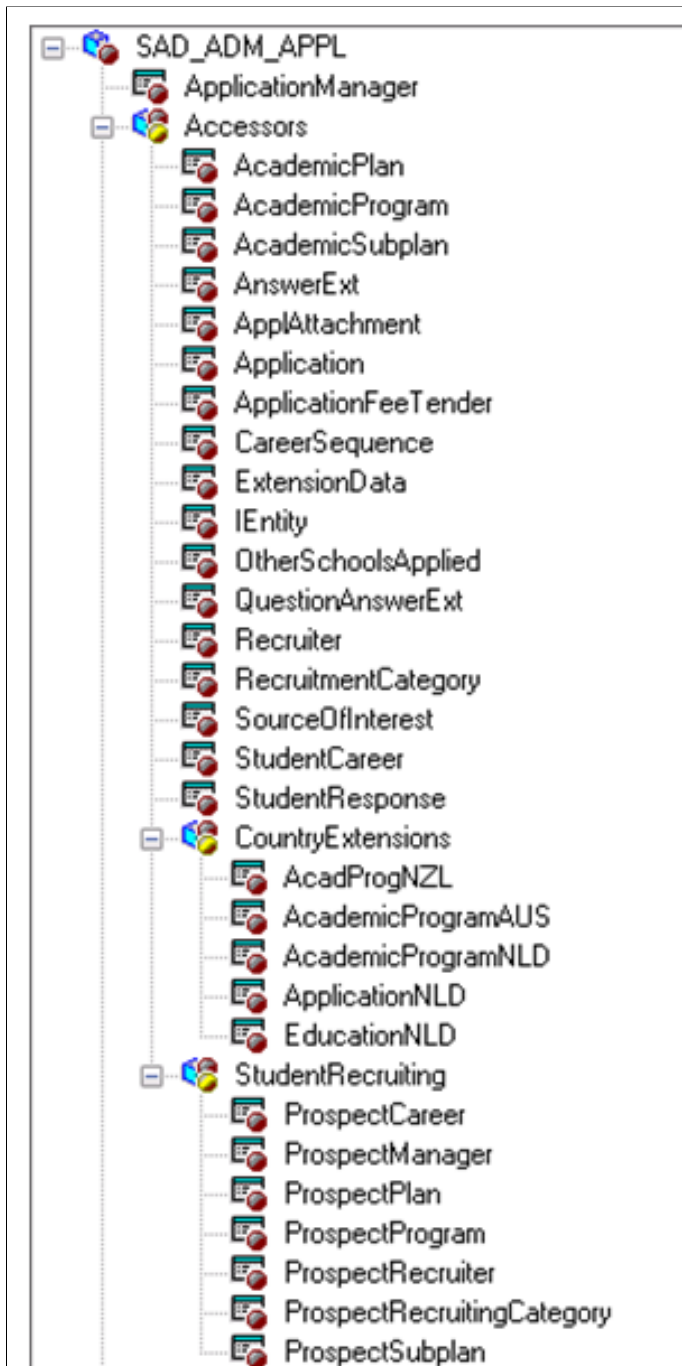
The Admissions Applications Programming Interface (API) moves the application data from the staging tables to the core Recruiting and Admissions tables.

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.

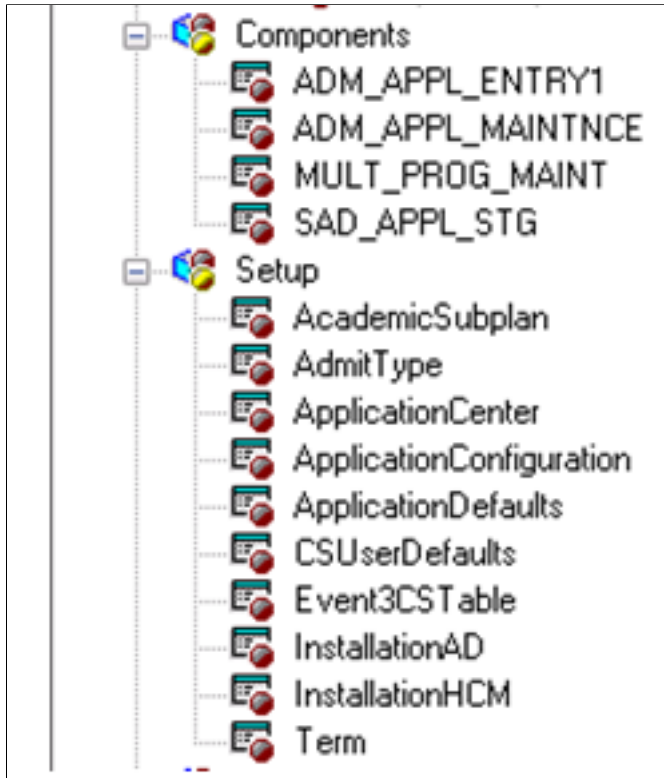
The following graphics show the application packages and classes in the Admission Applications Manager component:

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

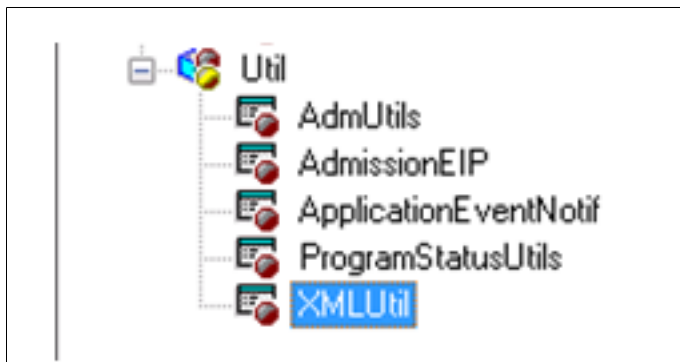




This image illustrates the Admission Applications Manager (2 of 3).



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**).

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## AAWS Service Operations

This section discusses the AAWS service operations that are delivered under the service called SAD\_ADMISSIONS.

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

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**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).

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## SAD\_CREATEAPPL

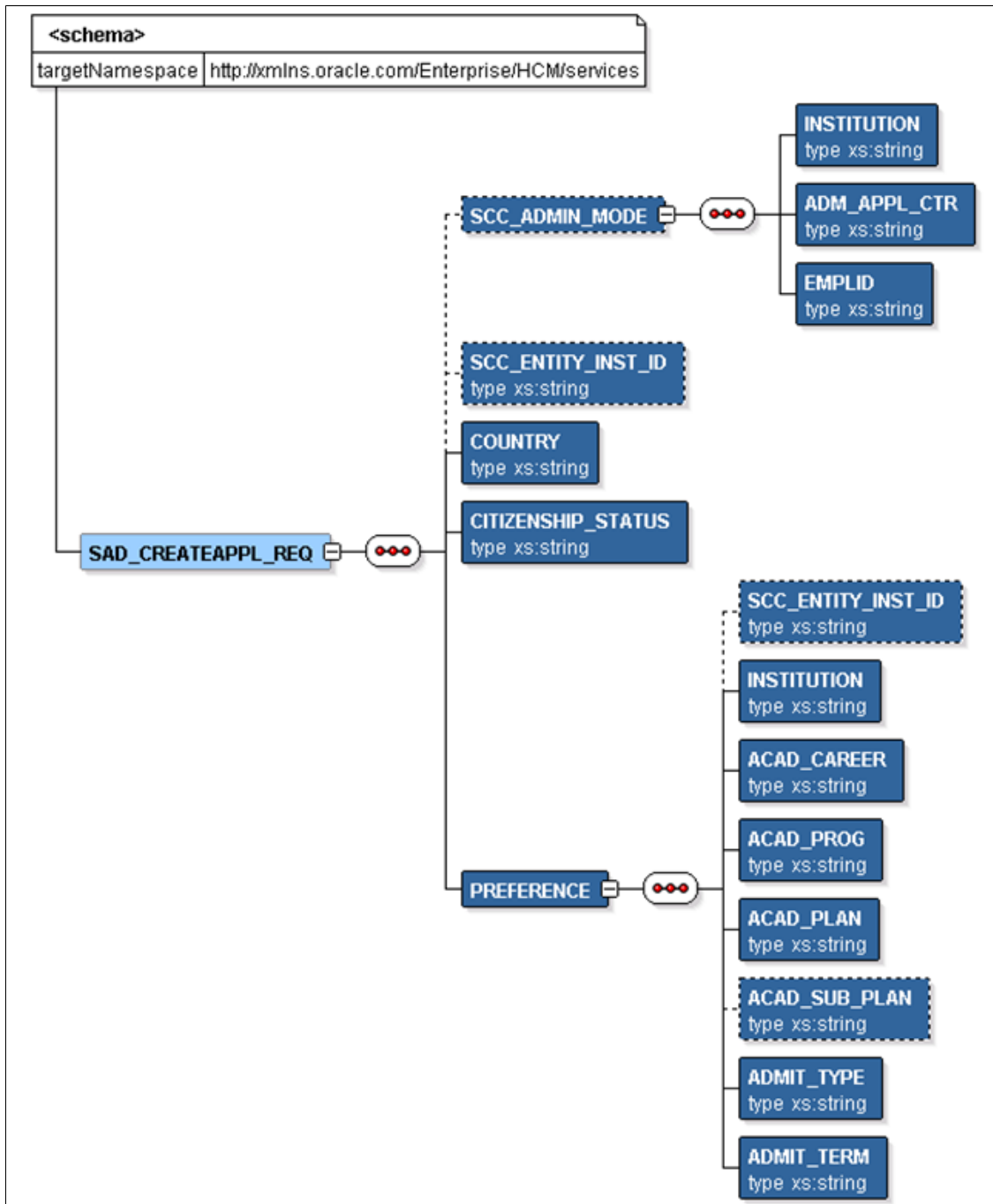
This service operation enables the online application user to create an admission application in the Campus Solutions system. Using this service may result in one or more applications being created. It can also result in multiple applicant preferences being created within the same application, for example,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

<b>Create Application Service Operation Description and Features</b>	<b>Details</b>
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"> <li>• An applicant using an online application.</li> <li>• An administrator using an online application for creating an application on behalf of an applicant who has or does not have an EMPLID.</li> </ul>
Processing	<p>The service operation performs the following steps:</p> <ol style="list-style-type: none"> <li>1. Validate that the user is authenticated (and is not a Guest)</li> <li>2. If Administrator mode then: <ul style="list-style-type: none"> <li>• Validate the required input administrator parameters.</li> <li>• Validate that the administrator is authorized to access the application center, institution, career, program and plan.</li> </ul> </li> <li>3. Validate the required input parameters for application creation.</li> <li>4. Determine the transaction that must be used to process the Institution/Academic Career combination. Define transactions on the Transaction Setup page.</li> <li>5. Begin a new transaction for the request. Assign a new TEMP_ID to the constituent.</li> <li>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.</li> <li>7. Return response though the output parameters.</li> </ol>

<b>Create Application Service Operation Description and Features</b>	<b>Details</b>
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	The following conditions result in a service error: <ul style="list-style-type: none"><li>• User is not authenticated (for example, if an anonymous Guest tries to sign into the online application, the service throws an error message).</li><li>• Administrative user is not authorized to access the application center, institution, career, program or plan.</li><li>• 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).</li></ul>

### 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>
```

```

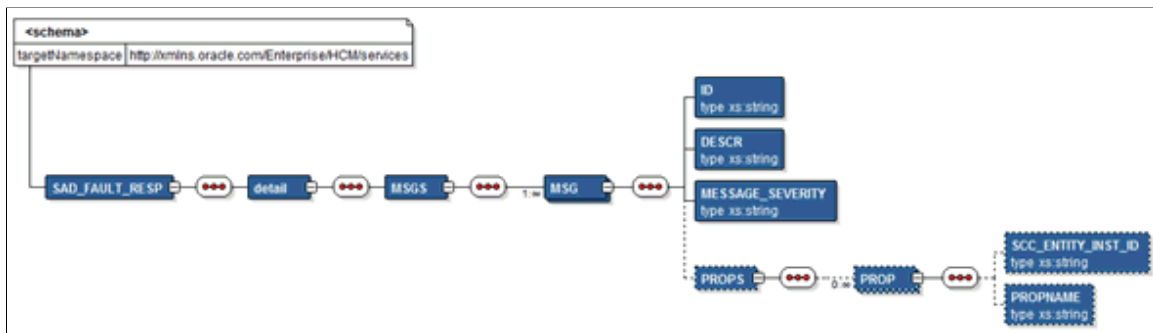
    </ADM_APPL_DATA>
    <CONSTITUENT>
      <!-- Constituent data shape -->
    </CONSTITUENT>
  </PREFERENCE>
</SAD_CREATEAPPL_RESP>

```

## 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 agai=>
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.

<b>Save Application Service Operation Description and Features</b>	<b>Details</b>
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"> <li>• An applicant using an online application.</li> <li>• An administrator using an online application for creating an application on behalf of an applicant or a student.</li> </ul>

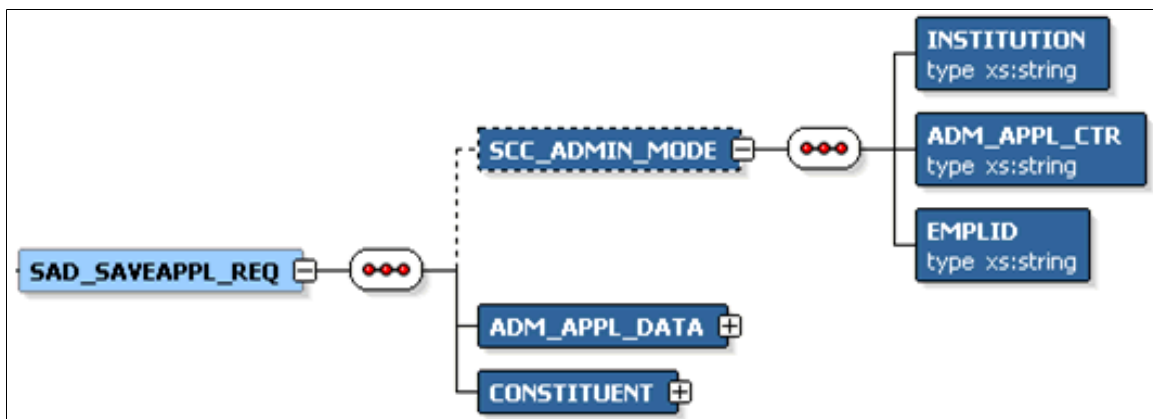


<b>Save Application Service Operation Description and Features</b>	<b>Details</b>
Processing	<p>The service operation performs the following steps:</p> <ol style="list-style-type: none"> <li>1. Validate that the user is authenticated (and is not a Guest)</li> <li>2. If administrator mode, then: <ol style="list-style-type: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

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

### 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

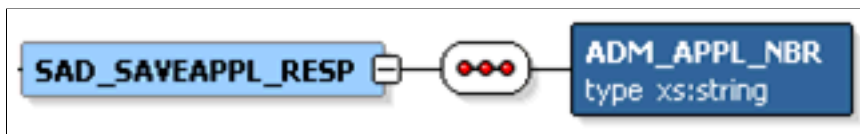
The following is an example of the SAD\_SAVEAPPL\_REQ message that the SAD\_SAVEAPPL service operation receives from an online application:

```
<?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.

<b>Submit Application Service Operation Description and Features</b>	<b>Details</b>
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"> <li>• An applicant using an online application.</li> <li>• An administrator using an online application for creating an application on behalf of an applicant or a student.</li> </ul>

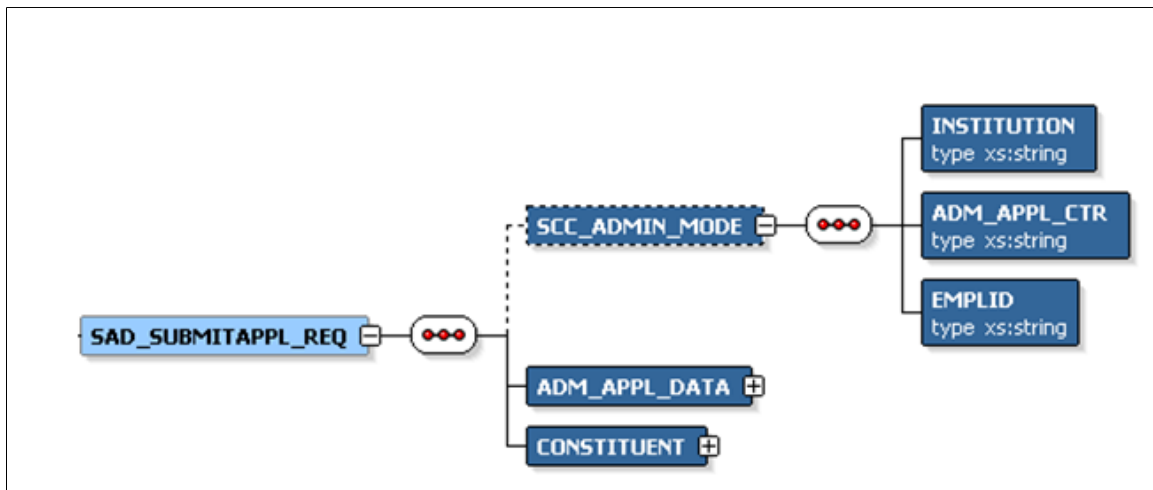
<b>Submit Application Service Operation Description and Features</b>	<b>Details</b>
Processing	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> <li>1. Validate that the user is authenticated (and is not a Guest).</li> <li>2. If administrator mode then:  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

<b>Submit Application Service Operation Description and Features</b>	<b>Details</b>
	<ul style="list-style-type: none"> <li>a. Call the Student Financials Fee Calculation API to calculate the fee amount.</li> <li>b. If Fee Waivers are allowed then allow the application to progress to submitted status.</li> <li>c. If Fee Waivers are Not allowed then:                             <ul style="list-style-type: none"> <li>1. Set the application data to Saved Status.</li> <li>2. Add the Fee details to the response message.</li> </ul> <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> </li> </ul> <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>
<p>Output</p>	<p>After completing the processing steps, the service operation:</p> <ul style="list-style-type: none"> <li>1. Posts the valid application data to the Campus Solutions admissions staging tables.</li> <li>2. Posts the valid constituent data to the Transaction Manager constituent staging tables.</li> <li>3. Transfers the application and constituent data from the staging tables to the person and admissions production tables.</li> <li>4. Optionally, creates or updates a person record for a valid application.</li> <li>5. Optionally, creates a prospect record for a known applicant.</li> </ul>

<b>Submit Application Service Operation Description and Features</b>	<b>Details</b>
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> <li>• 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.)</li> <li>• User is not authorized to access the application (for example, the applicant is trying to access an application created by another applicant).</li> <li>• Application is invalid (that is, the application fails validation processing).</li> <li>• 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).</li> </ul>

### 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

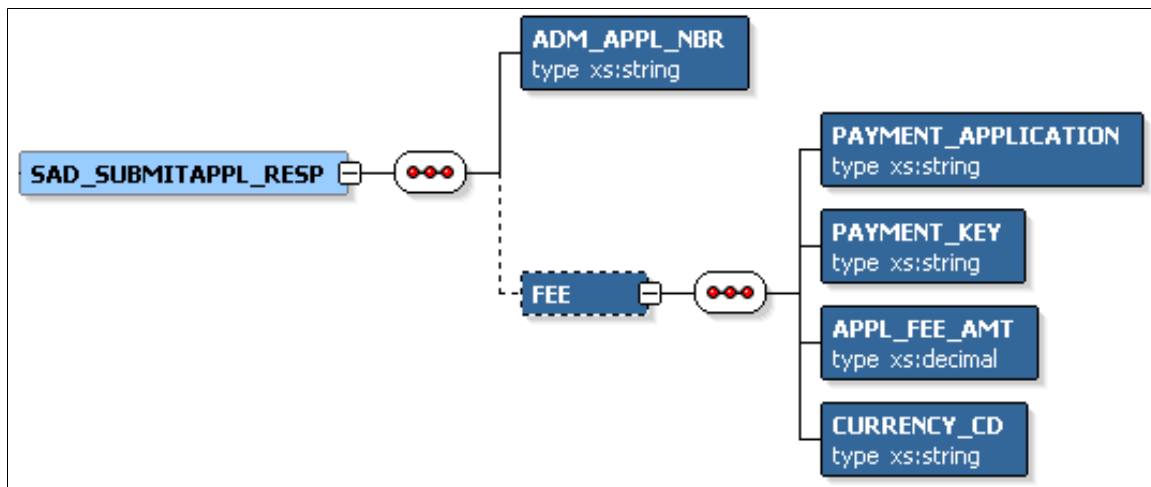
The following is an example of the SAD\_SUBMITAPPL\_REQ message that the SAD\_SUBMITAPPL service operation receives from an online application:

```
<?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.

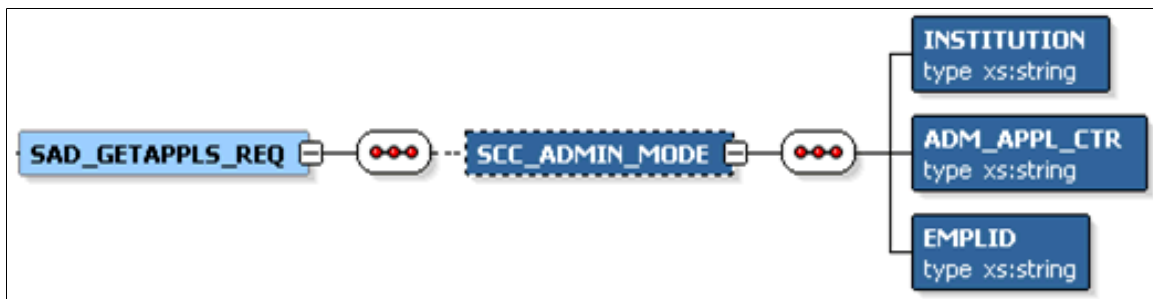
<b><i>Get Applications Service Operation Description and Features</i></b>	<b><i>Details</i></b>
Description	<p>Use this service operation to retrieve a summary of all the applications that reside in the Campus Solutions staging and production tables. The service operation retrieves only those applications 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"> <li>• An applicant using an online application.</li> <li>• 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 EEMPLID.</li> </ul>

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

<b>Get Applications Service Operation Description and Features</b>	<b>Details</b>
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> <li>• 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).</li> <li>• Required input parameters have not been supplied by the user (see the graphic titled <i>SAD_GETAPPLS_REQ Message Parameters</i>).</li> </ul>

### 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

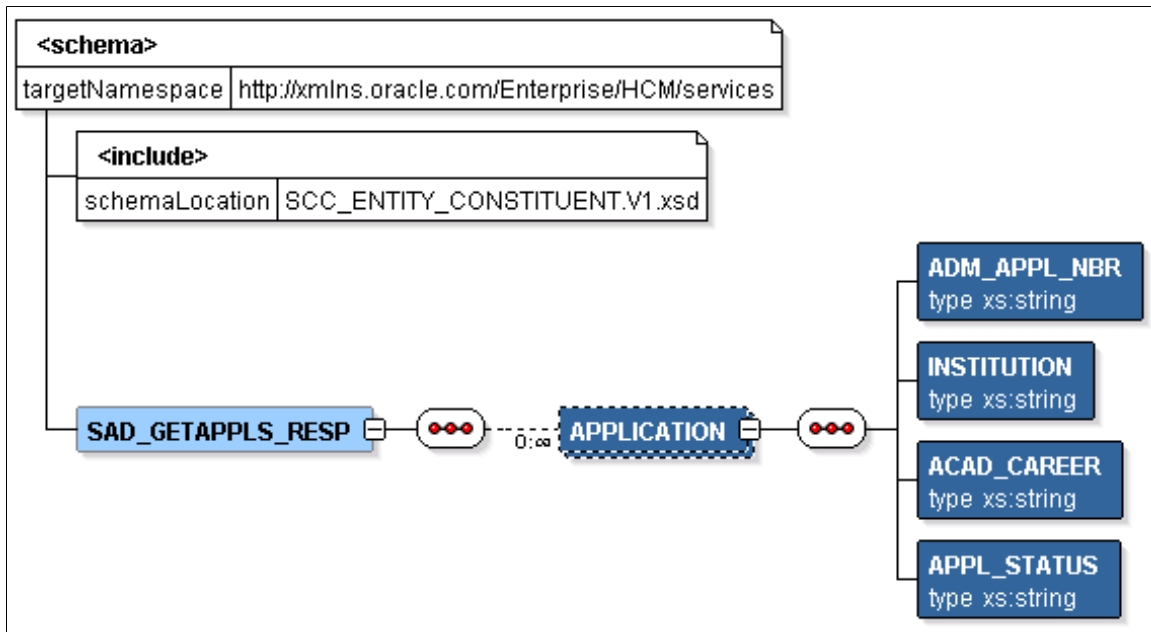
The following is an example of the SAD\_GETAPPLS\_REQ message that the SAD\_GETAPPLS service operation receives from an online application:

```
<?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.

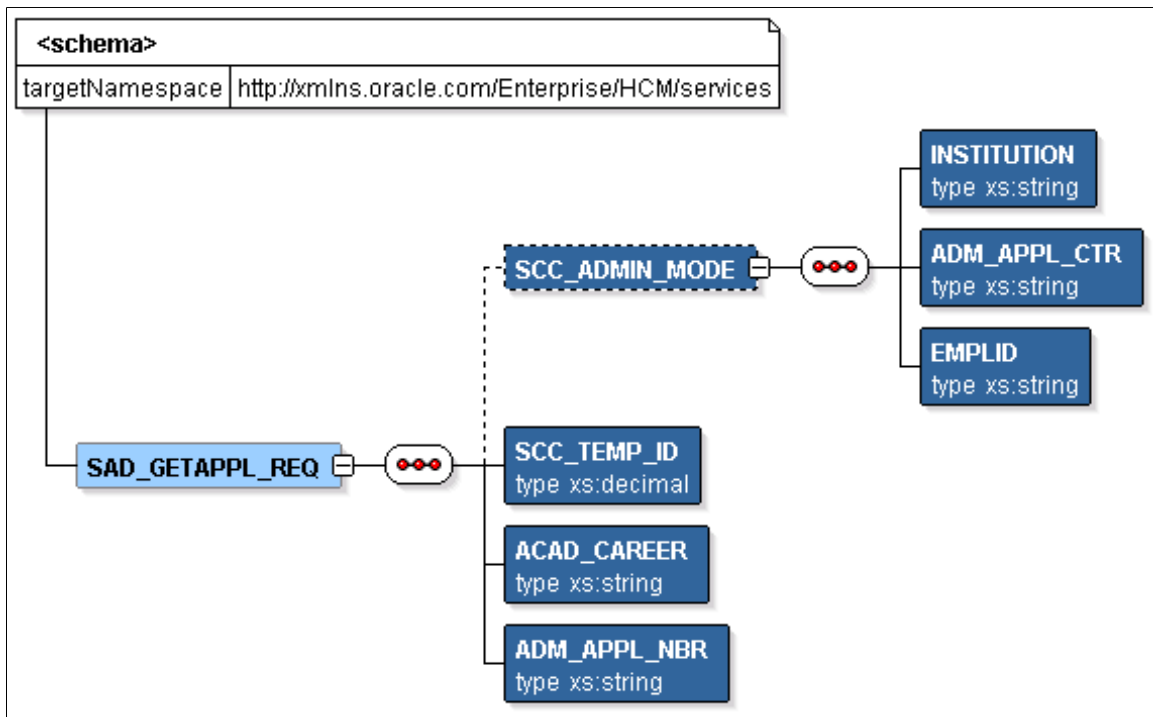
<b><i>Get Application Service Operation Description and Features</i></b>	<b><i>Details</i></b>
Description	<p>Use this service operation to retrieve a saved or submitted application using the ADM_APPL_NBR key.</p> <p>An online application can obtain the ADM_APPL_NBR application key by calling the SAD_GETAPPLS 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"> <li>• An applicant using an online application.</li> <li>• 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 EEMPLID.</li> </ul>

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

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

### 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

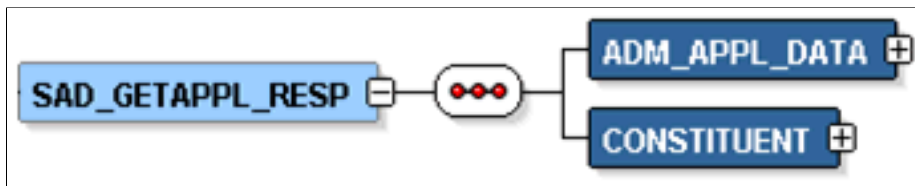
The following is an example of the SAD\_GETAPPL\_REQ message that the SAD\_GETAPPL service operation receives from an online application:

```
<?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.



<b><i>Get Attachment Service Operation Description and Features</i></b>	<b><i>Details</i></b>
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"> <li>• An applicant using an online application.</li> <li>• 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.</li> </ul>

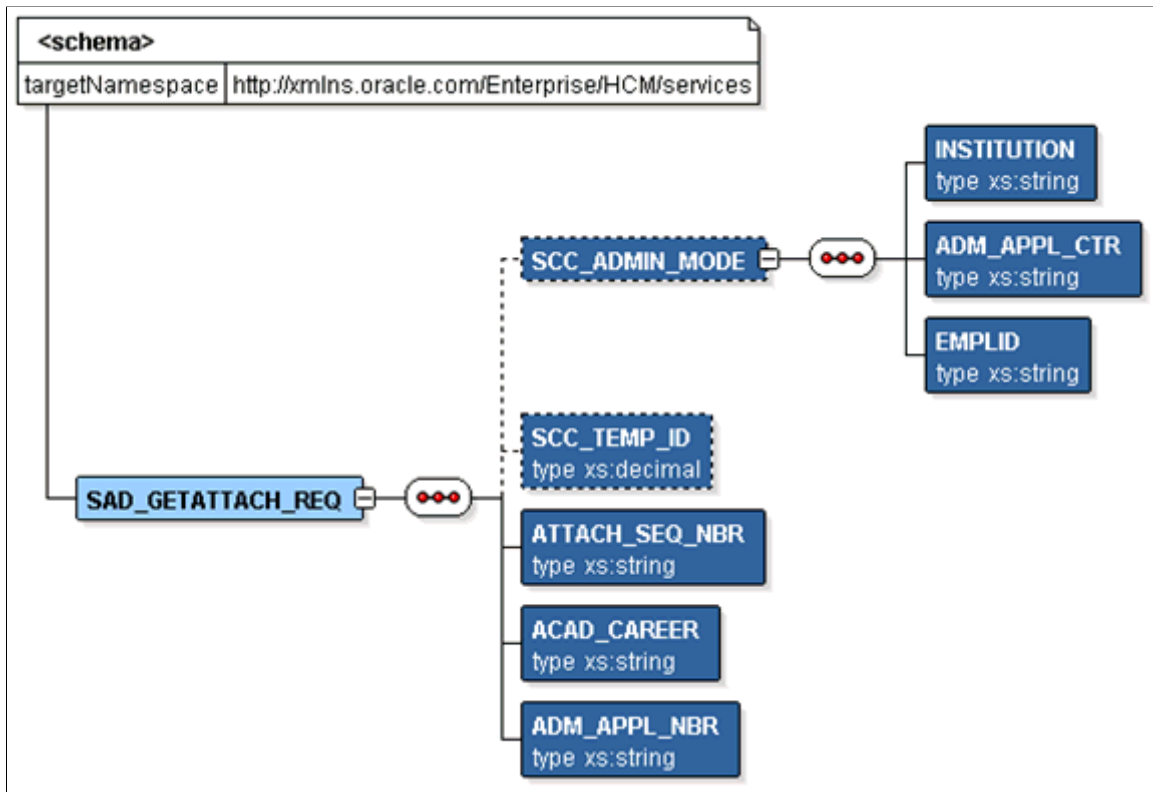
<b>Get Attachment Service Operation Description and Features</b>	<b>Details</b>
Processing	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> <li>1. Validate that the user is authenticated (and is not a Guest).</li> <li>2. If administrator mode, then: <ol style="list-style-type: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

<b>Get Attachment Service Operation Description and Features</b>	<b>Details</b>
Error Conditions	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> <li>• 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).</li> <li>• User is not authorized to retrieve the attachment (for example, the applicant is trying to access an attachment created by another user).</li> <li>• 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.</li> </ul>

**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

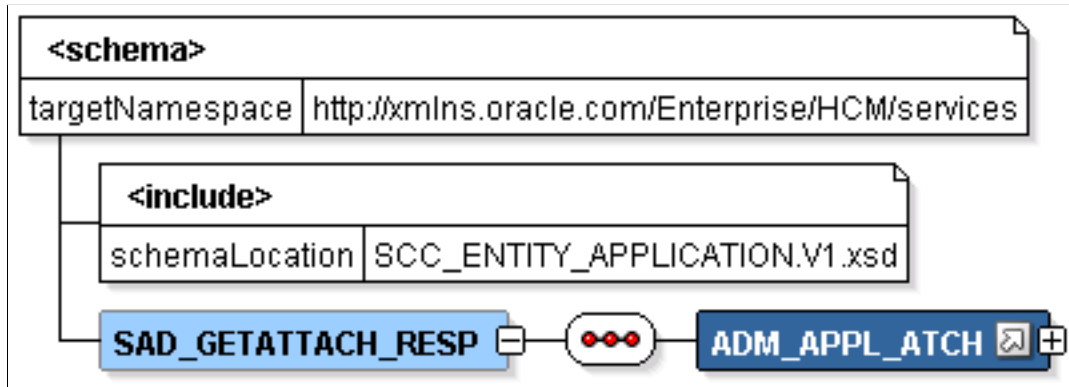
The following is an example of the SAD\_GETATTACH\_REQ message that the SAD\_GETATTACH service operation receives from an online application:

```
<?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.

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**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.

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**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:

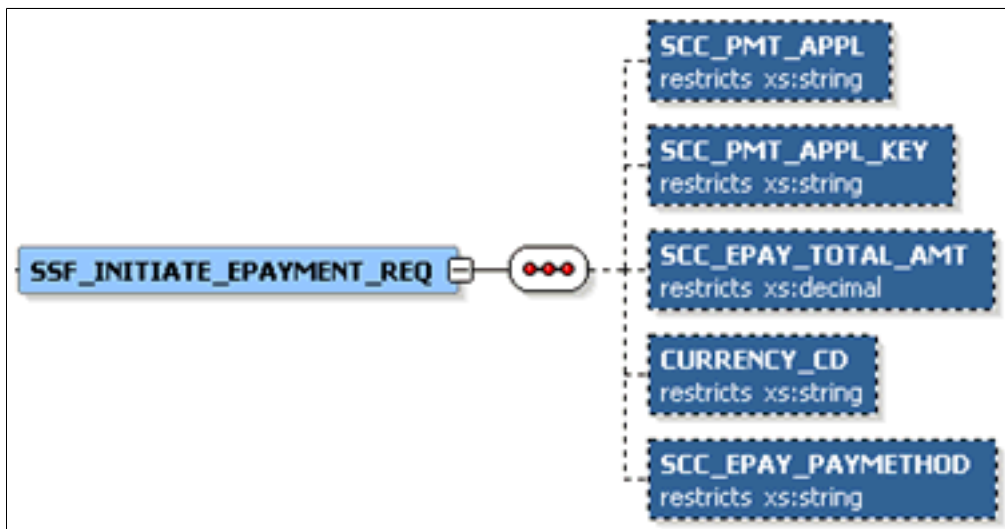
<p>Description:</p>	<p>The Initiate ePayment service operation call will create a new SF Payment in Student Financials in Initiated status, assigning a new SF Payment Reference Number (SF_PMT_REF_NBR) for tracking. This service uses the payment application's own tracking number as the merchant reference 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"> <li>• 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.</li> <li>• The transaction must have been originated by the owner of the application.</li> <li>• The application must be in Saved (SV) status.</li> <li>• 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>.</li> <li>• The tender used must be defined as a valid tender on the Application Fee code associated with the application center.</li> </ul>
<p>Users:</p>	<p>An applicant using an online application.</p>

<p>Processing:</p>	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> <li>1. Validate the parameters passed in to the web service.</li> <li>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.</li> <li>3. Call the AAWS adapter to:             <ul style="list-style-type: none"> <li>• Validate the application.</li> <li>• Validate the payment parameters.</li> <li>• Create Application Tender Staging records.</li> <li>• Save the application.</li> </ul> </li> <li>4. Call the hosted payment framework. The hosted payment framework will:             <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul> </li> </ol>
<p>Output:</p>	<p>After completing the processing steps, the service operation:</p> <ol style="list-style-type: none"> <li>1. Records the transaction in the SF Payment table and Detail records.</li> <li>2. Creates new Admissions Application Tender Staging records.</li> <li>3. Optionally, performs a web service callout to the third party payment processor to pass demographic information and receive a token identifying the transaction.</li> </ol>

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

### 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>
```

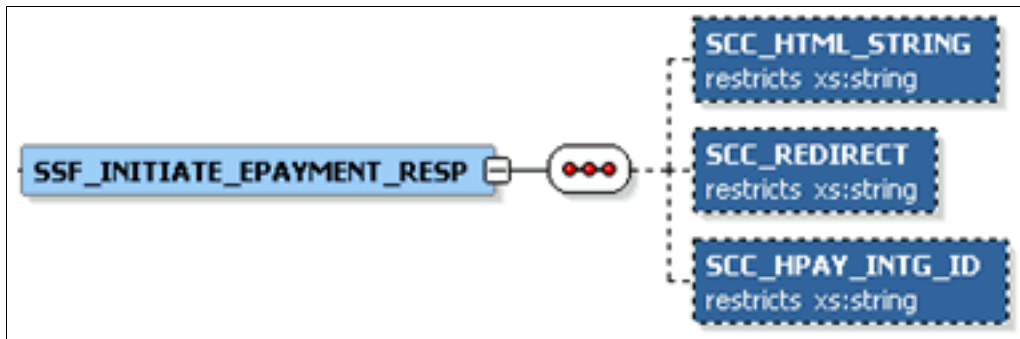


```
<SCC_EPAY_PAYMETHOD>CC</SCC_EPAY_PAYMETHOD>
</SSF_INITIATE_EPAYMENT_REQ>
```

## 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.

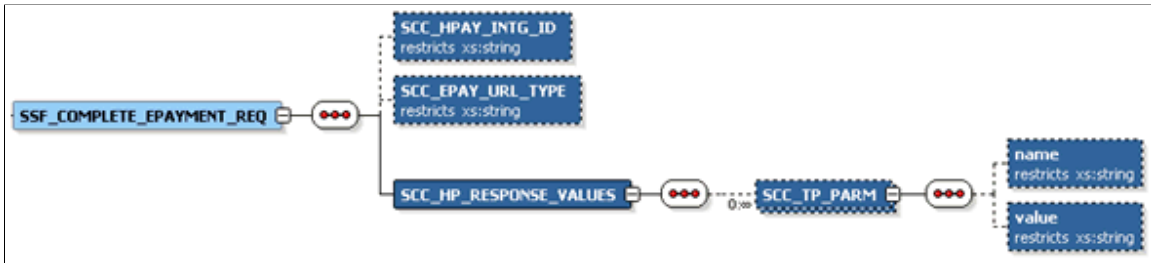
Details:

<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>

<p>Processing:</p>	<p>This service operation performs the following steps:</p> <ol style="list-style-type: none"> <li>1. Validate the parameters passed in to the web service.</li> <li>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.</li> <li>3. Complete the SF Payment associated with the application. For successfully submitted transactions, the transaction will be authorized and sent to the General Ledger.</li> <li>4. Call the AAWS adapter to update the proper fields in the application and submit it.</li> </ol>
<p>Output:</p>	<p>After completing the processing steps, the service operation:</p> <ol style="list-style-type: none"> <li>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.</li> <li>2. Creates the General Ledger Transaction records for later processing to the General Ledger.</li> <li>3. Submits the application if the payment was successfully authorized.</li> </ol>
<p>Error Conditions:</p>	<p>The following conditions result in a service error:</p> <ul style="list-style-type: none"> <li>• The Hosted Payment Adapter ID is invalid.</li> <li>• The Return URL type is invalid (Valid values are S, C or E)</li> <li>• The Payment Application is invalid.</li> <li>• Required input parameters have not been supplied by user.</li> <li>• The transaction does not pass the AAWS adapter validation.</li> </ul>

### 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](#)

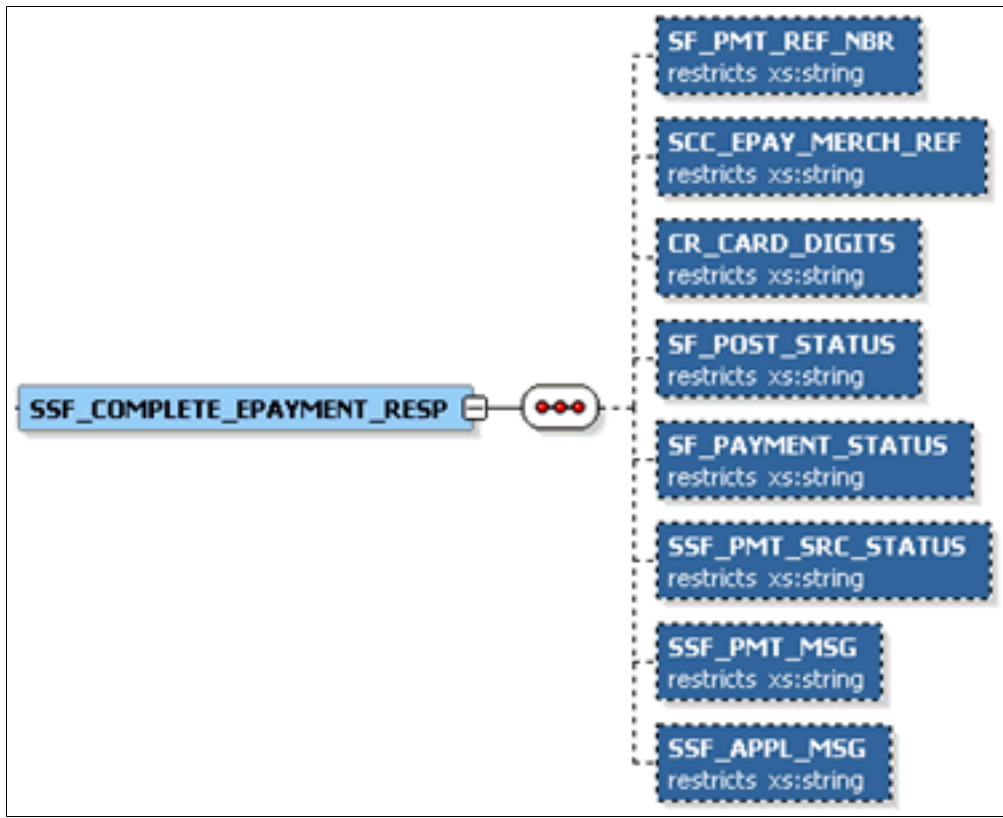
The following is an example of the SSF\_COMPLETE\_EPAYMENT\_REQ message that the SSF\_COMPLETE\_EPAYMENT service operation receives from an online application:

```
<?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

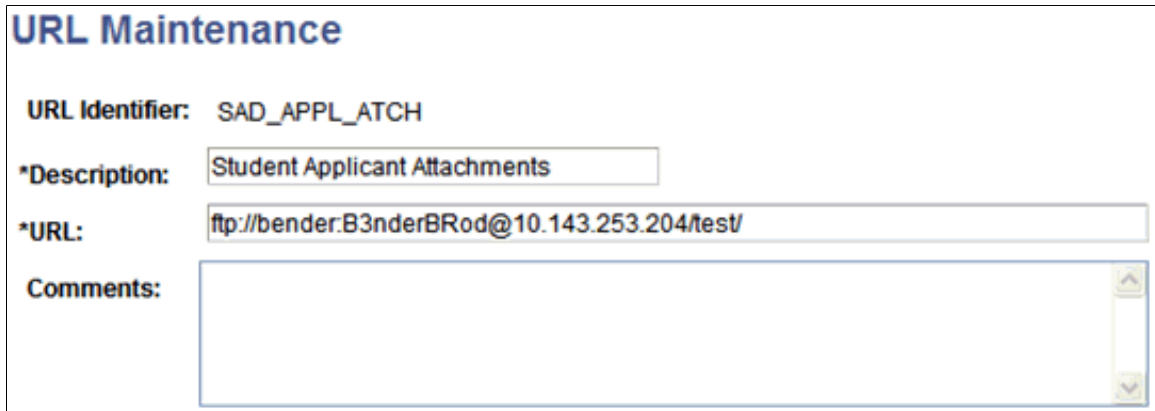
Refer to the SSF\_TRANS\_FAULT\_RESP message example in the SSF\_INITIATE\_EPAYMENT section.

## 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:** An empty 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.

The screenshot shows the 'Adapter Table' configuration page. It includes the following fields and values:

- Adapter ID:** QA\_CS\_MODEL1A\_AAWS
- Adapter Type:** Hosted Payment Adapters
- Description:** Adapter for AAWS
- Long Description:** (Empty text area)

Below these fields is a 'Parameters' section with a dark blue header. It contains three searchable fields:

- 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.

The screenshot shows the 'Hosted Payment Adapter Parameters' page. It features two tabs: 'Hosted Payment Adapter' and 'Parameters'. The 'Parameters' tab is active. The fields and values are:

- Hosted Payment Adapter:** QA\_CS\_MODEL1A\_AAWS
- HTML Definition:** QA\_CS\_HPAY\_AAWS
- Third Party URL:** QA\_CS\_TP\_URL
- Record Name:** (Empty search field)
- Field Name:** (Empty search field)

At the bottom, there is a table with a dark blue header. The table has two columns: 'Return URL Type' and 'Weblib Function'. The 'Return URL Type' column has a dropdown menu. The 'Weblib Function' column has a dropdown menu and a 'Main Content' button. The table also includes navigation controls like 'First', '1 of 1', and 'Last'.

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:**

**\*Status:**

**\*Service Provider:**

**\*Third Party Merchant ID:**   Hosted Payment Provider

---

Hosted Payment Setup

**Adapter:**  🔍

**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:**  🔍 Insert All Transactions

**Adapter:**  🔍  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:**

**\*Process Option:**  ▼

**\*Payment Merchant:**  ▼

Hosted Payment Provider

**Batch Transmission Error:**

---

**Credit Card**

Real-Time Authorization     Real-Time Capture     Real-Time Credit

---

**Self Service Options**

**Convenience Fee Option:**  ▼

**Convenience Fee Amount:**

**Convenience Fee Percentage:**

**Minimum Payment Amount:**

**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

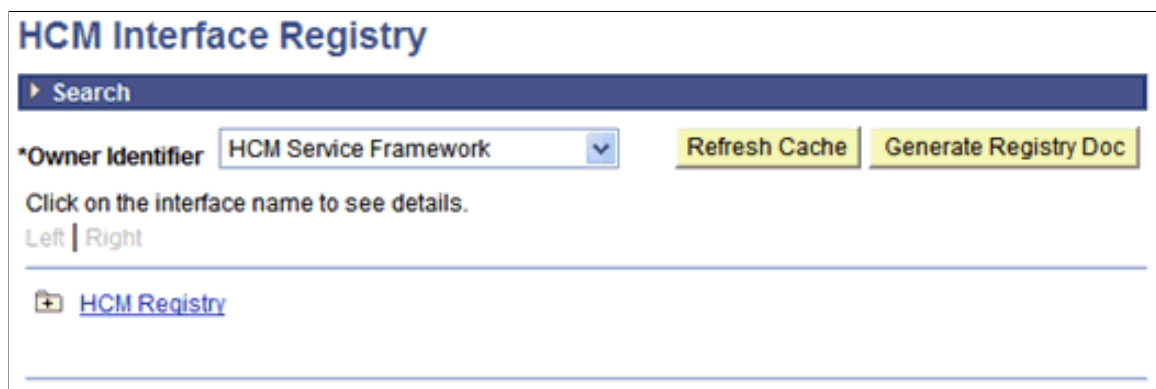
## Refreshing the HCM Registry Cache

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.



2. 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.

The screenshot shows a web interface titled "Logging". Below the title is a section labeled "Logging Parameters" with a blue header. The parameters are:

- \*Logging Type: A dropdown menu with "File" selected.
- \*Log Threshold: A dropdown menu with "All" selected.
- Logging Filename: A text input field containing "c:\temp\integration.log".
- Last Log ID Assigned: A text input field containing "40".

---

**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:

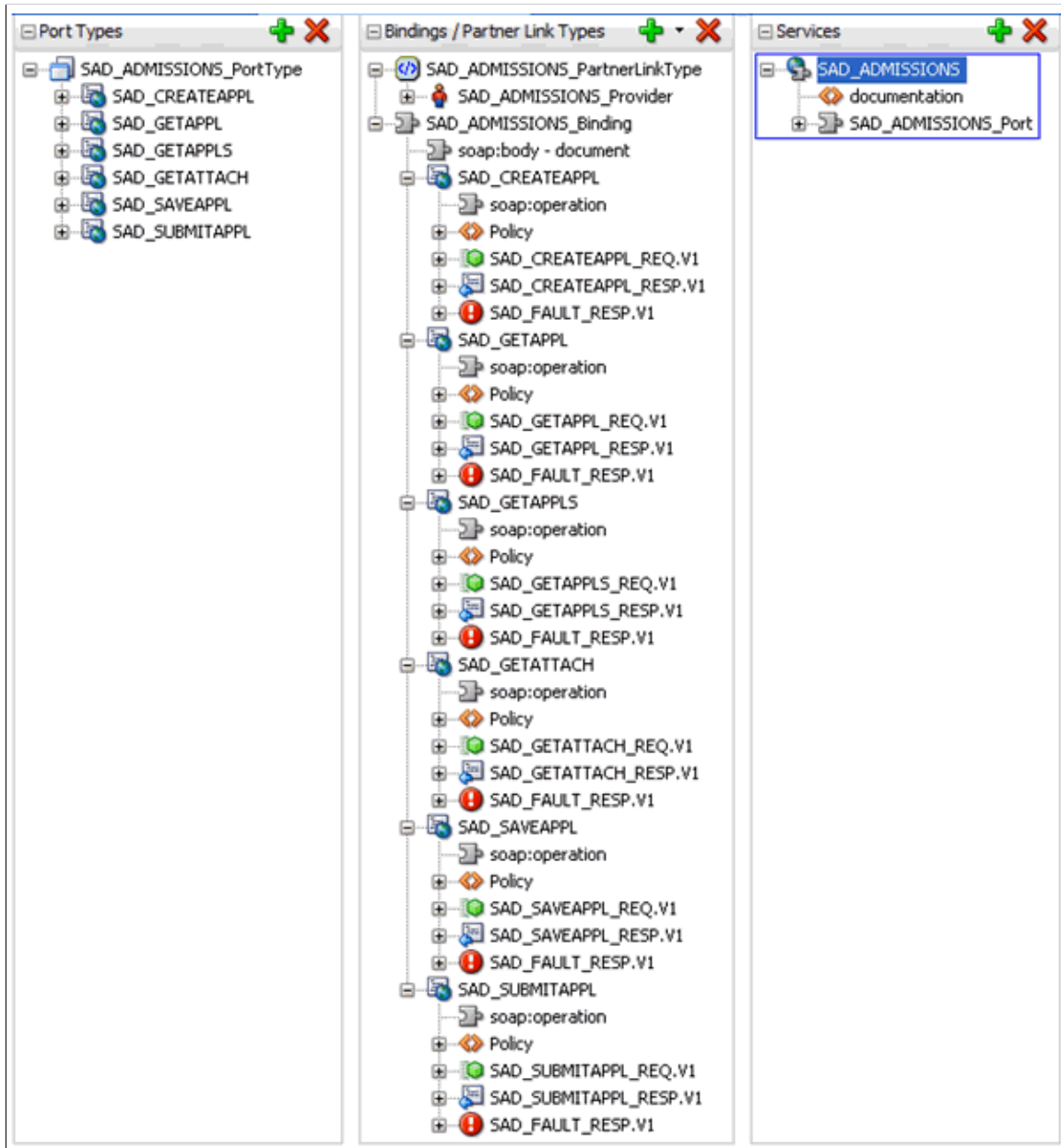
```
<BODY onload="submitForm()" >
  <form name="myform" action="https://someserver/upay/web/index.jsp" method="post">
    <input type="hidden" name="UPAY_SITE_ID" value="3">
    <input type="hidden" name="TICKET" value="12345">
    <input type="hidden" name="TICKET_NAME" value="12345">
  </form>
  <SCRIPT 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
connector/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.oracl
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 SADS SAVEAPPLRESP sadSAVEAPPL(@WebParam(targetNamespace="http://xmlns.oracle⇒
.com/Enterprise/HCM/services",
        partName="parameter", name="SAD_SAVEAPPL_REQ")
        SADS SAVEAPPLREQ parameter)
        throws sadAdmissions.SAD_FAULT_RESPV1;

```

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

```

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

//Create the Application response
    SADS SAVEAPPLRESP respSaveAppl = new SADS SAVEAPPLRESP();

    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:

<b>Setup Areas</b>	<b>See</b>
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.	<a href="#">Setting Up the Attachments URL</a>

<b>Setup Areas</b>	<b>See</b>
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.	<a href="#">Setting Up Your Recruiting Structure</a>
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.	<a href="#">Configuring Admission Transactions</a>
Set up SOLA and verify whether SOLA is set up properly	<a href="#">SOLA Setup and Verification</a>
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	<a href="#">Setting Up Hosted Payment</a>

---

## Web Services Used by SOLA

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

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

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## 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:

<b>Entity ID</b>	<b>Entity Name</b>	<b>Staging Record</b>
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

<b>Entity ID</b>	<b>Entity Name</b>	<b>Staging Record</b>
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)

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## 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.

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

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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.

The screenshot shows the 'Student Home Page' with two main sections:

**Current Applications**: A table with columns for 'Application Nbr', 'Institution', 'Academic Career', and 'Status'. The table is currently empty. Navigation controls for 'First', '1 of 1', and 'Last' are visible at the top right of the table.

**Create A New Application**: A form with six input fields, each with a search icon: '\*Institution', '\*Academic Career', '\*Admit Term', '\*Academic Program', '\*Academic Plan', and '\*Admit Type'. Below the form is a 'Create Application' button.

2. The applicant selects the institution, academic career, admit term, academic program, academic plan, and admit type he or she wishes to apply for.
3. The applicant clicks the **Create Application** button. This invokes the SAD\_CREATEAPPL web service operation.
4. 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).
5. 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.

The screenshot displays a web application interface for data entry. At the top, there are six tabs: 'Basic Information', 'Contact Information', 'Emergency Contact', 'Academics', 'Other', and 'Submit'. The 'Basic Information' tab is selected and highlighted in blue. Below the tabs, the 'Basic Information' section contains the following fields:

- Legal First Name:
- Legal Middle Name:
- Legal Last Name:
- Name Suffix:
- Preferred First Name:
- Date of Birth:
- Birth Country:
- Birth City:
- Birth State:
- Gender:

Below the Basic Information section are two more sections:

- Citizenship Information**: Country
- Military Information**: Military Status

At the bottom of the form, there are three buttons: 'Cancel', 'Save', and '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 returned 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.

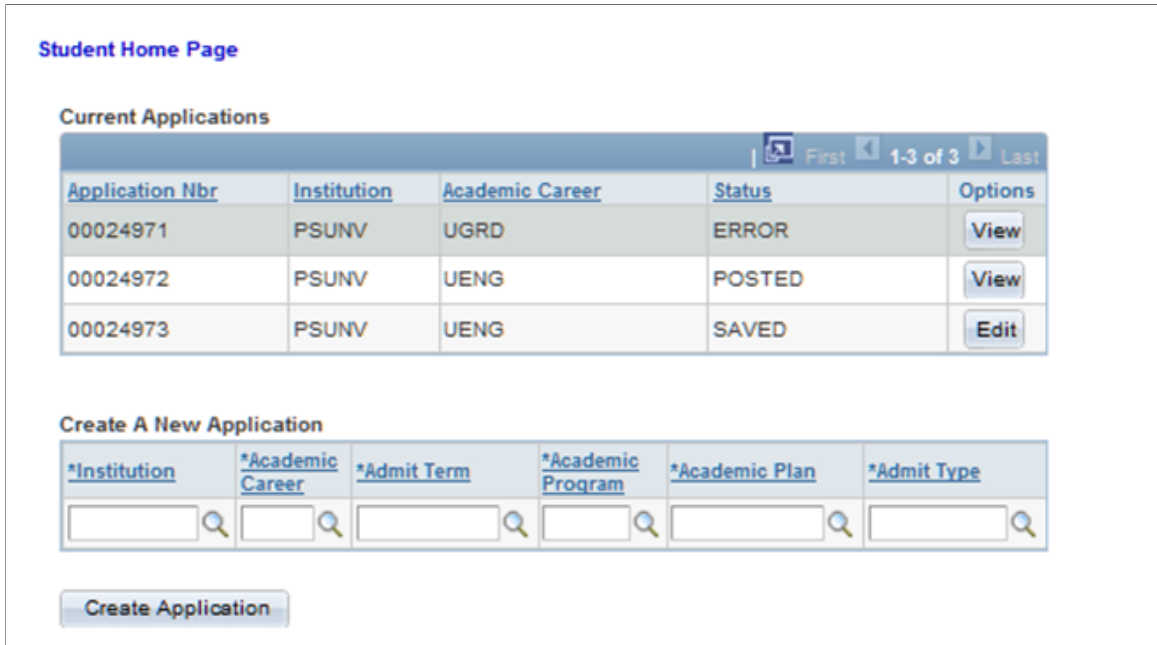
## Editing Existing Multiple Applications and Reviewing Multiple Application Statuses

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.



3. 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.**

<b>Basic Information</b>	
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

<b>Citizenship Information</b>	
Country	USA United States
National ID	XXXXXXXX

<b>Military Information</b>	
Military Status	No Military Service

<b>Permanent Address</b>	
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).

<b>Mailing Address</b>	
Country	USA United States
Address 1	12 Main
Address 2	
Address 3	
City	Belford
State	NJ New Jersey
Postal	07718
County	
<b>Phone and Email Information</b>	
Home Phone	818/555-1234
Mobile Phone	888/555-1212
Personal Email	Jsmith123@oracle.com
<b>Emergency Contact Information</b>	
Contact Name	John Smith
Relationship	Parent
<b>Emergency Contact Address Information</b>	
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
<b>Emergency Contact Phone Information</b>	
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

**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.

4. 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 shows the 'Basic Information' page of the SOLA application. The page has a navigation bar with tabs: 'Basic Information' (selected), 'Contact Information', 'Emergency Contact', 'Academics', 'Other', and 'Submit'. The form is divided into three sections:

- Basic Information:**
  - 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 (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

At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Next Step'.

- 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 displays the 'Contact Information' page with the following elements:

- Navigation Tabs:** Basic Information, **Contact Information** (active), Emergency Contact, Academics, Other, and Submit.
- Permanent Address Section:** Includes a 'Country' dropdown menu with a search icon and a checkbox labeled 'Mailing Address Same As Permanent?'.
- Mailing Address Section:** Includes a 'Country' dropdown menu with a search icon.
- Phone and Email Information Section:**
  - Home Phone: 818/555-1234
  - Mobile Phone: 888/555-1212
  - Personal Email: Jsmith123@oracle.com
- Navigation Buttons:** Previous Step, Cancel, Save, and 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

Previous Step Cancel Save Next Step

- 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 (SAD\_OLA\_CONTACT) with the following sections and fields:

- Navigation:** Basic Information, Contact Information, **Emergency Contact**, Academics, Other, Submit.
- Emergency Contact Information:**
  - Contact Name: John Smith (with placeholder: <First Name><space><Last Name>)
  - Relationship: Parent (dropdown menu)
- Emergency Contact Address Information:**
  - Country: CAN (with search icon) Canada
  - Address 1: 1000 Skippy Lane
  - Address 2: Unit A
  - Address 3: (empty)
  - Address 4: (empty)
  - City: Gray Creek
  - Province: BC (with search icon) British Columbia
  - Postal: V0B 1S0
- Emergency Contact Phone Information:**
  - Primary Phone: 250/888-4785
  - Mobile Phone: 250/818-4569
- Buttons:** Previous Step, Cancel, Save, 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 with the following elements:

- Navigation Tabs:** Basic Information, Contact Information, Emergency Contact, Academics (selected), Other, and Submit.
- Home Schooled:** A checkbox labeled "I was Home Schooled".
- Last School Attended:**
  - A checkbox labeled "I can't find my school".
  - 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 header for additional school records.
- Navigation 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.

	<u>Question</u>	<u>Attachment</u>	<u>Upload</u>
1	What influenced you to apply to the university?	<a href="#">What_influenced_me.bt</a>	<input type="button" value="Upload"/>
2	Describe your most meaningful activity outside the classroom.	<a href="#">My_most_meaningful.bt</a>	<input type="button" value="Upload"/>

**Additional Questions**

What is your favorite color?

Blue

Maximum 100 characters

What is your favorite food?

Sushi

Maximum 100 characters

**We have to ask -**

Have you ever been convicted of a felony?

Yes   
  No

- 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 interface for the Submit page. At the top, there are six navigation tabs: 'Basic Information', 'Contact Information', 'Emergency Contact', 'Academics', 'Other', and 'Submit'. The 'Submit' tab is highlighted in blue. Below the tabs, a message reads 'You are almost finished with the application Jane'. Underneath this message is a checkbox that is checked, with 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 page, there are four buttons: 'Previous Step', 'Cancel', 'Save', and 'Submit'. The 'Submit' button is highlighted in blue, indicating it is the active or available button.

- 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.

The screenshot shows a message box with a blue header labeled "Message". Below the header, the text 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 of the box, 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 "Application Fees" section of the Fee/Waiver page. At the top, there are navigation tabs: "Basic Information", "Contact Information", "Emergency Contact", "Academics", "Other", and "Submit". The "Application Fees" section contains the following fields and controls:

- Application Fee Amount:** 10.00 USD
- Select Payment Type:** A dropdown menu with "CC" selected.
- Pay Fees Now:** A button.

The "Waiver Request" section contains the following fields and controls:

- I'd like to request a fee waiver:** A text input field with a search icon.
- Request Waiver:** A button.
- Cancel:** A 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:**

**Long Description:**

Parameters

**Root Package ID:**

**Path:**

**Application Class ID:**

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 are navigation tabs: Basic Information, Contact Information, Emergency Contact, Academics, Other, and Submit. The main content is divided into two sections:

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

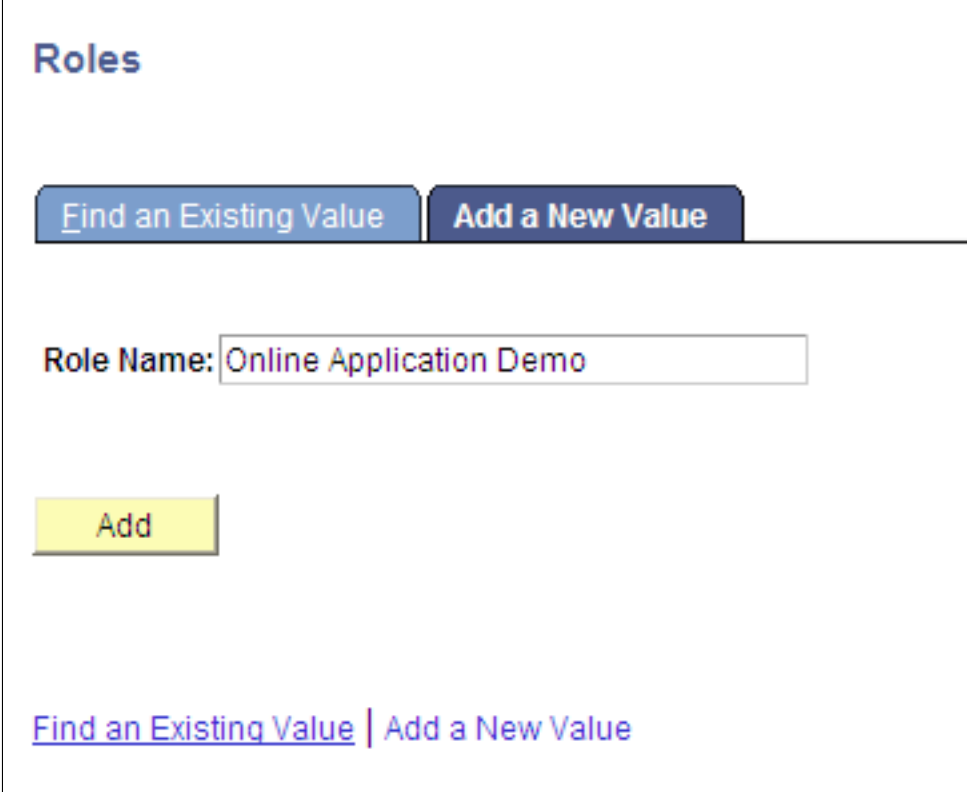
3. Click the **Search** button.
4. Verify whether a URL value (either a File Server or Database) has been supplied.

## 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 are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these buttons, the 'Role Name' field is populated with 'Online Application Demo'. A yellow 'Add' button is visible below the text input. At the bottom of the interface, there are two links: 'Find an Existing Value' and '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.

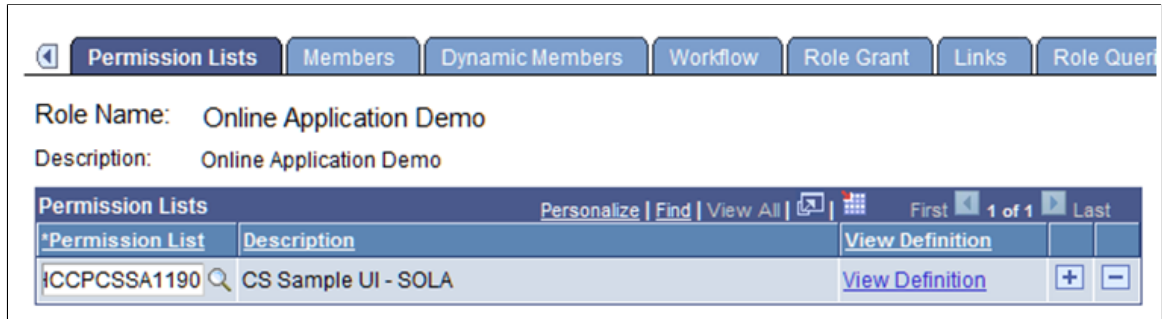


The screenshot shows the 'General' page interface. At the top, there are several tabs: 'General', 'Permission Lists', 'Members', 'Dynamic Members', 'Workflow', 'Role Grant', 'Links', 'Role Queries', and 'Audit'. Below the tabs, the 'Role Name' field is populated with 'Online Application Demo'. The '\*Description' field is also populated with 'Online Application Demo'. Below the description field, there is a 'Long Description' section with a large text area for input.

- d. Add the permission list *HCCPCSSA1190*:



This is an example of adding a permission list for the SOLA role on the Permission Lists page.

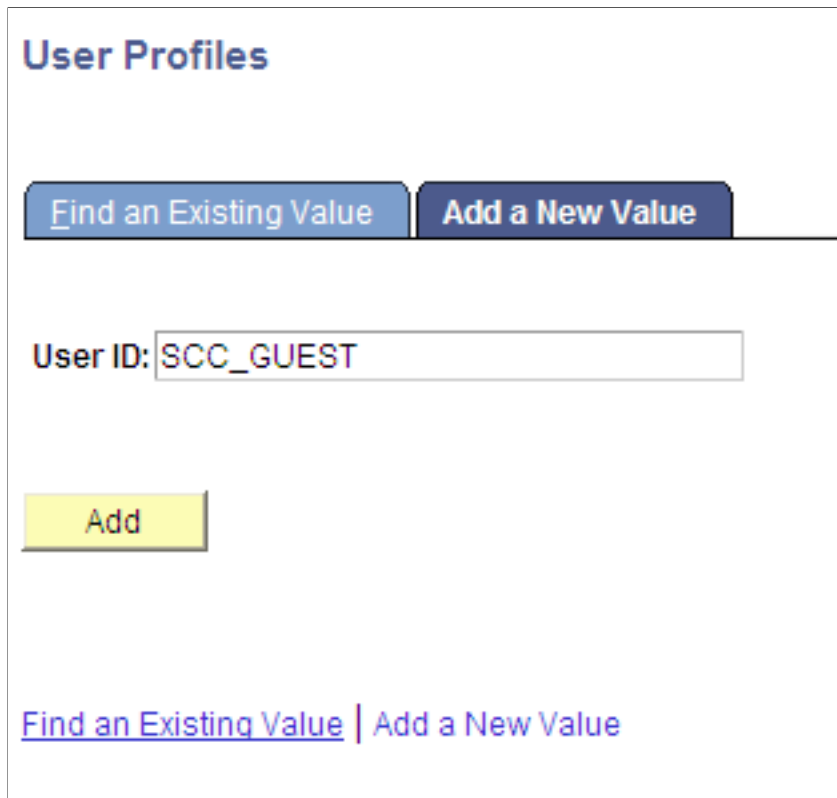


### Step 3: Create New User Accounts

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.

General | ID | Roles | Workflow | Audit | Links | User ID Queries

User ID: SCC\_GUEST

Description:  Account Locked Out?

**Logon Information**

Symbolic ID: SYSADM

Password:   Password Expired?

Confirm Password:

User ID Alias:

[Edit Email Addresses](#) [Instant Messaging Information](#)

**General Attributes**

Language Code: English  Enable Expert Entry

Currency Code:

Default Mobile Page:

**Permission Lists**

Navigator Homepage:  Primary:  [?](#)

Process Profile:  Row Security:

- On the ID page, enter values as shown in this graphic:

This example illustrates the values entered on the ID page.

General | ID | Roles | Workflow | Audit | Links | User ID Queries

User ID: SCC\_GUEST

Description: Campus Community Guest

**ID Types and Values** Find | View All First 1 of 1 Last

\*ID Type: None

Attribute Name	Attribute Value	Description

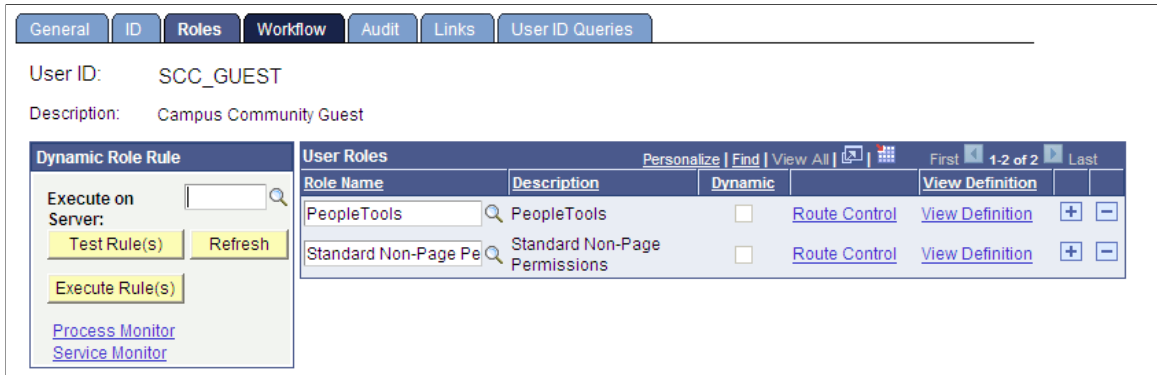
**User Description**

Description: Campus Community Guest

[Set Description](#) 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.



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.



#### 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   REST Service Type

\*Description

Comments

Service Alias

Owner ID

\*Namespace

[Link Existing Operations](#)     
 [View WSDL](#)     
 [Provide Web Service](#)

**Service Operations**

Service Operation

Operation Type

**Existing Operations**
Personalize | Find | View All |  | 
First  1-6 of 6  Last

Operation	Message Links	Feedback		
Operation.Default Version	Description	Active	Operation Type	
<a href="#">SAD_CREATEAPPL.v1</a>	Create Application	<input checked="" type="checkbox"/>	Synch	<input type="button" value="−"/>
<a href="#">SAD_GETAPPL.v1</a>	Get Application Operation	<input checked="" type="checkbox"/>	Synch	<input type="button" value="−"/>
<a href="#">SAD_GETAPPLS.v1</a>	Get Applications Summary	<input checked="" type="checkbox"/>	Synch	<input type="button" value="−"/>
<a href="#">SAD_GETATTACH.v1</a>	Get Applicant Attachment	<input checked="" type="checkbox"/>	Synch	<input type="button" value="−"/>
<a href="#">SAD_SAVEAPPL.v1</a>	Save Application Operation	<input checked="" type="checkbox"/>	Synch	<input type="button" value="−"/>
<a href="#">SAD_SUBMITAPPL.v1</a>	Submit Application Operation	<input checked="" type="checkbox"/>	Synch	<input type="button" value="−"/>

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).

This example illustrates the fields and controls on the General page after save (2 of 2).

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   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  Last

Operation	Message Links			
Operation.Default Version	Description	Active	Operation Type	
<a href="#">SCC_USERREG_AUTHENTICATE.v1</a>	Authenticate a User	<input checked="" type="checkbox"/>	Synch	<input type="button" value="-"/>
<a href="#">SCC_USERREG_CREATEACCT.v1</a>	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.

Node Definitions		Connectors	Portal	WS Security	Routings
Node Name:	ANONYMOUS				<a href="#">Copy Node</a>
*Description:	Used internally by IB system.				<a href="#">Rename Node</a>
*Node Type:	External	<input type="checkbox"/> Default Local Node			<a href="#">Delete Node</a>
		<input type="checkbox"/> Local Node			
		<input checked="" type="checkbox"/> Active Node			
		<input type="checkbox"/> Non-Repudiation			
		<input checked="" type="checkbox"/> Segment Aware			
*Authentication Option:	None				
*Default User ID:	SCC_GUEST				
WSIL URL:					
Hub Node:					
Master Node:					
Company ID:					
IB Throttle Threshold:					
Image Name:					
Codeset Group Name:					
External User ID:					
External Password:					
External Version:					
<a href="#">Save</a>		<a href="#">Contact/Notes</a>	<a href="#">Properties</a>		

- 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.

Node Name ANONYMOUS

**Authentication Token**

\*Authentication Token Type

Encrypted

Digitally Signed

Use External User ID

(Password Optional)

Save

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		
Service	Description	
SAD_ADMISSIONS	Admissions Web Service	<a href="#">View WSDL</a>

- 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

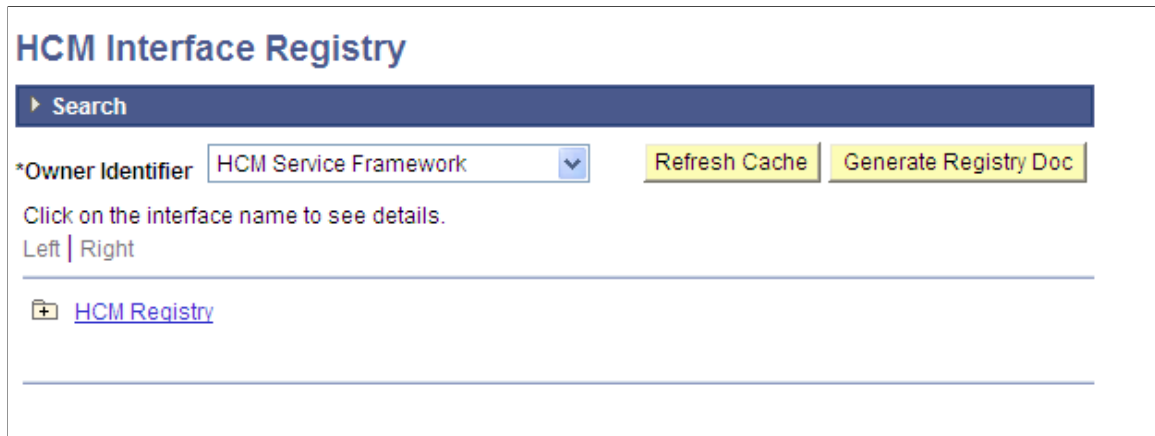
- Repeat the steps for the SCC\_USERREG web service.

## 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.



**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.

---

**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**

**Description**

**Default:**

**\*Status**

**\*Provisioning Context**

Security to Provision				
Role Name	Description	View Definition		
1	Online Application Demo	Online Application Demo	<a href="#">View Definition</a>	+ -
2	CS - Guest	CS - Guest	<a href="#">View Definition</a>	+ -

#### Target Page

URL

**Or :**

**Component Name**

**Menu Name:**

**Menu Bar Name:**

**Item Name:**

**Page Name:**

**Access Mode**

**\*Node Name**

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			
Application Nbr	Institution	Academic Career	Status

**Create A New Application**

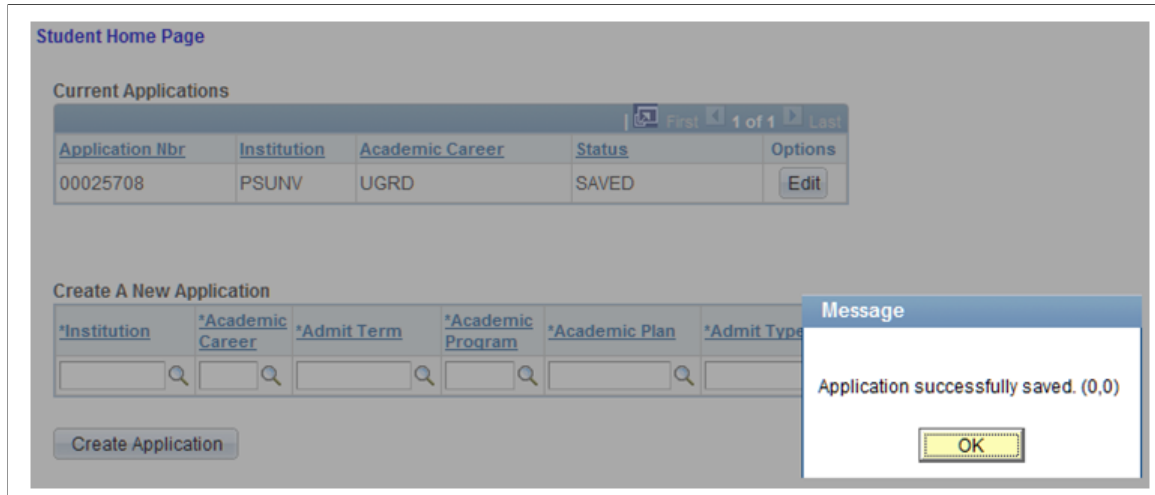
*Institution	*Academic Career	*Admit Term	*Academic Program	*Academic Plan	*Admit Type
PSUNV	UGRD	0690	FAU	ART	FYR

**Create Application**

7. Click the **Create Application** button.
8. Change the value for the **Gender** field to *Female*.
9. 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.



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.



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	<input type="button" value="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"/>

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 Name


Legal Middle Name

Legal Last Name


Name Suffix  

Preferred First Name

Date of Birth  

Birth Country  


Birth City

Birth State  

Gender  ▼

---

**Citizenship Information**

Country  

---

**Military Information**

Military Status

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:

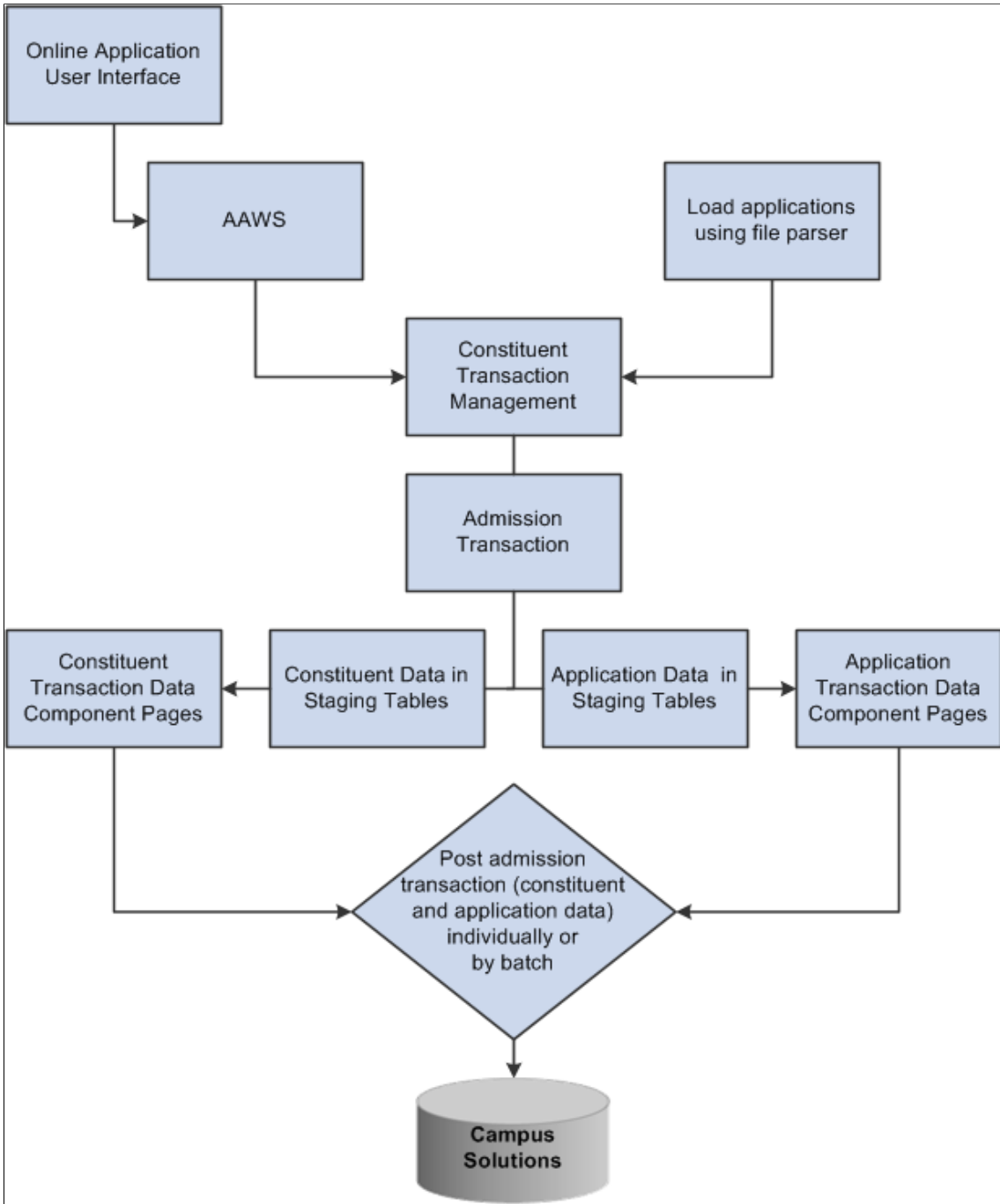
- An applicant or administrator uses an online admission application to create, save or submit an application through AAWS (online transaction).
- You use the File Parser utility to load applications from an external file (offline transaction).

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)

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## 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)

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**Warning!** The `ADMISSIONS_APPLICATION` transaction is delivered only as a reference. It is not required that you use this transaction.

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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.

<i>Root Package ID</i>	<i>Path</i>	<i>Application Class ID</i>
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.

<i>Menu Name</i>	<i>Menu Bar Name</i>	<i>Menu Item Name</i>	<i>Menu Page Name</i>
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:

<b>Entity</b>	<b>Rules</b>
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>

<b>Entity</b>	<b>Rules</b>
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.

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## 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' 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. Includes a 'Run Search/Match/Post' button.
- Application Information:** \*Institution: PeopleSoft University, Academic Career: Undergraduate Engineering, Application Nbr: 00024910, Application Status Date: 11/10/2011, Application Status: Submitted. Includes 'Expand All' and 'Collapse All' buttons.
- Application Errors:** A table with columns: Message Sequence, Message Set Number, Message Number, Error Description, Message Severity, Process Instance. Row 1: 1, 1, 14098, 151 Reconcile error: Select a value for EXT\_ORG\_ID, Reconcile Error, 3344.
- Program Data:** Program Number: 0, Exp. Graduation Term: [Search], \*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](#)

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## 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.

The screenshot shows the 'Entity Registry' page. The top section is 'Entity Configuration' for the entity 'Application' (ID: SCC\_ENTITY\_20090521094345). It includes fields for Name, Status (Active), Entity Type (Staged Entity), Description, \*AppClass (SAD\_ADM\_APPL.Accessors:Application), Prod Record (ADM\_APPL\_DATA), Stage Record (SAD\_APL\_DAT\_STG), and Element (XML) (ADM\_APPL\_DATA). There is an unchecked checkbox for 'Apply Data Update Rule' and buttons for Properties, Generate XSD, Generate Code, View Unit Tests, and View Hierarchy.

The bottom section is a table titled 'Children' with columns: Order, \*Entity Name, Status, Embed, \*Min, \*Max, Element Wrapper (XML), View, and navigation icons. The table lists several children, with the row for 'Q&A Application Extens' highlighted in red.

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:

<i>Entity Name</i>	<i>Staging Record Names</i>	<i>Production Record Names</i>
Application	SAD_APL_DAT_STG	ADM_APPL_DATA
Career Sequence	SAD_APP_CSQ_STG	ADM_APP_CAR_SEQ

<b>Entity Name</b>	<b>Staging Record Names</b>	<b>Production Record Names</b>
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

<b>Entity Name</b>	<b>Staging Record Names</b>	<b>Production Record Names</b>
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_SUPRVSRS
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

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Configuration &gt; Application Configuration &gt; Appl Config</b>	Map online application transactions to academic careers.
Application Setup	SAD_APL_CNT	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Configuration &gt; Application Configuration &gt; Application Setup</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Configuration &gt; Application Configuration &gt; Prospect Setup</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Configuration &gt; Application Configuration &gt; School Setup</b>	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'. Below this is a 'Transaction Mapping' table with columns for 'Academic Career', 'Description', 'Transaction', and 'Description'. The table contains six rows of mappings, each with a search icon and '+'/'-' buttons.

	*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 Permane	+ -
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.

Academic Institution: PSUNV PeopleSoft University					
Application Setup					
Criteria		Assigned Values			
	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>
<b>Career</b>	Enter the <b>Career</b> for which you want to assign an <b>Application Center</b> (and optionally, an <b>Event ID</b> ).
<b>Program</b>	<p>Optionally, enter the <b>Program</b> for which you want to assign an <b>Application Center</b> (and optionally, an <b>Event ID</b>).</p> <p>If you leave this field blank, the system assigns the <b>Application Center</b> to all the <b>Programs</b> within the <b>Career</b>. For example, suppose you have two <b>Application Centers</b>: APP01 and APP02. Map the <b>Career GRAD</b> and <b>Program MBA</b> combination to the APP01 <b>Application Center</b> and map the <b>GRAD Career</b> to the APP02 <b>Application Center</b>. In such a case, the system assigns APP01 <b>Application Center</b> to an MBA application and assigns APP02 to other non MBA applications such as a MS or MA application.</p>
<b>Plan</b>	<p>Optionally, if you have entered a program, enter the <b>Plan</b> for which you want to assign an <b>Application Center</b> (and optionally, an <b>Event ID</b>).</p> <p>If you leave this field blank, the system assigns the <b>Application Center</b> to all the <b>Plans</b> within the program. For example, suppose you have two <b>Application Centers</b>: APP03 and APP04. Map the <b>Career GRAD</b>, <b>Program MS</b>, and <b>Plan Finance</b> combination to the APP03 <b>Application Center</b> and map the <b>GRAD Career</b> and <b>MS Program</b> to APP04 <b>Application Center</b>. In such a case, the system assigns APP03 <b>Application Center</b> to an MS Finance application and assigns APP04 to other Master of Science applications such as MS in Biochemistry or MS in Physics.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Country and Citizenship Status</b>	<p>Enter the <b>Country</b> and <b>Citizenship Status</b> if you want to assign an <b>Application Center</b> (and optionally, an Event ID) based on the applicant’s citizenship. For example, you could have the <b>Career UGRD</b>, <b>Country USA</b>, and <b>Citizenship Status Alien Temporary</b> mapped to an Undergrad International Office <b>Application Center</b> and <b>GRAD, USA</b>, and <b>Alien Temporary</b> mapped to a Graduate International Office <b>Application Center</b>.</p> <hr/> <p><b>Note:</b> If you enter a value in one of the two fields, you cannot leave the other field blank. For example, if you enter a <b>Country</b>, you must specify the <b>Citizenship Status</b>.</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.

	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.

	Recruiting Center	Description	Recruiting Status	Referral Source	Description	Event ID	Description		
1	MEDS	Medical School	Applicar	GFRM	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	NEWPF	New Prospect - PROS	+	-
4	UENG	Undergraduate Engineering	Applicar	APPL	Application	AD_PR	Admissions PROS	+	-
5	UENG	Undergraduate Engineering	Applicar	APPL	Application	NEWPF	New Prospect - PROS	+	-
6	UENG	Undergraduate Engineering	Applicar	APPL	Application	NEWPF	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.

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**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.

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**Criteria**

<b>Field or Control</b>	<b>Description</b>
<b>Career</b>	Enter the career for which you want to create prospect records and assign default values.
<b>Program</b>	<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>
<b>Create Prospect</b>	<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"> <li>• <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.</li> <li>• <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.</li> </ul>

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. The 'Academic Institution' is 'PSUNV' and the 'PeopleSoft University' is 'PeopleSoft University'. The 'Configure Unlisted / Home School' section is active, showing a table with two rows: 'Unlisted School' and 'Home School'. Each row has radio buttons for 'Post Application Using Default' and 'Require Manual Reconciliation'. The 'Unlisted School' row has 'Post Application Using Default' selected, and the 'Home School' row has 'Require Manual Reconciliation' selected. A search bar for 'Transaction' is set to 'PSUNV\_BUSN\_APPLICATION'.

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>
<b>Post Application Using Default</b>	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>
<b>Default Organization</b>	<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><b>Note:</b> 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/>
<b>Require Manual Reconciliation</b>	<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 <a href="#">Reviewing and Editing Staged Admission Application Transactions</a></p>

## Home School

<i>Field or Control</i>	<i>Description</i>
<b>Post Application Using Default</b>	Select if you want to specify a default organization ID for home schools.
<b>Default Organization</b>	<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><b>Note:</b> 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/>
<b>Require Manual Reconciliation</b>	<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><a href="#">Reviewing and Editing Staged Admission Application Transactions</a></u></p>

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## 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"> <li>• <b>Student Admissions &gt; Application Transaction Mgmt &gt; Application Transactions &gt; Application Data</b></li> <li>• Click the &lt;Transaction Name&gt; link on the Summary Information page of the Constituent Staging component.</li> </ul>	<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"> <li>• <b>Student Admissions &gt; Application Transaction Mgmt &gt; Application Transactions &gt; Additional Information</b></li> <li>• Click the &lt;Transaction Name&gt; link on the Summary Information page and then click the Additional Information tab.</li> </ul>	<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"> <li>• <b>Student Admissions &gt; Application Transaction Mgmt &gt; Application Transactions &gt; Education History</b></li> <li>• Click the &lt;Transaction Name&gt; link on the Summary Information page and then click the Education History tab.</li> </ul>	<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>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Additional Academic Info	SAD_STG_TEST	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Application Transaction Mgmt &gt; Application Transactions &gt; Additional Academic Info</b></li> <li>• Click the &lt;Transaction Name&gt; link on the Summary Information page and then click the Additional Academic Info tab.</li> </ul>	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"> <li>• <b>Student Admissions &gt; Application Transaction Mgmt &gt; Application Transactions &gt; Supplemental Information</b></li> <li>• Click the &lt;Transaction Name&gt; link on the Summary Information page and then click the Supplemental Information tab.</li> </ul>	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"> <li>• <b>Student Admissions &gt; Application Transaction Mgmt &gt; Application Transactions &gt; Candidature Details</b></li> <li>• Click the &lt;Transaction Name&gt; link on the Summary Information page and then click the Candidature Details tab.</li> </ul>	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"> <li>• <b>Student Admissions &gt; Application Transaction Mgmt &gt; Application Transactions &gt; Application Regional</b></li> <li>• Click the &lt;Transaction Name&gt; link on the Summary Information page and then click the Application Regional tab.</li> </ul>	Review and edit the country-specific data pertaining to the application in the staging record.

## Impact of Application Center Security on Navigation

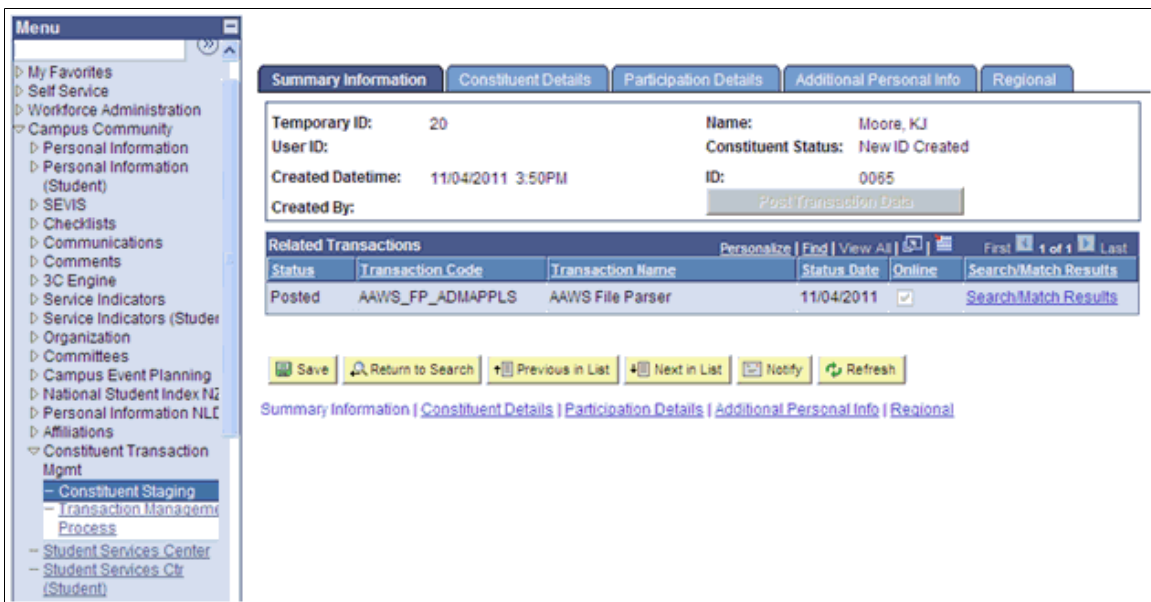
One of the methods to navigate to the Application Transactions component is by clicking the <transaction name> link on the Constituent Staging component. There are two ways to access the Constituent Staging component:

- 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.

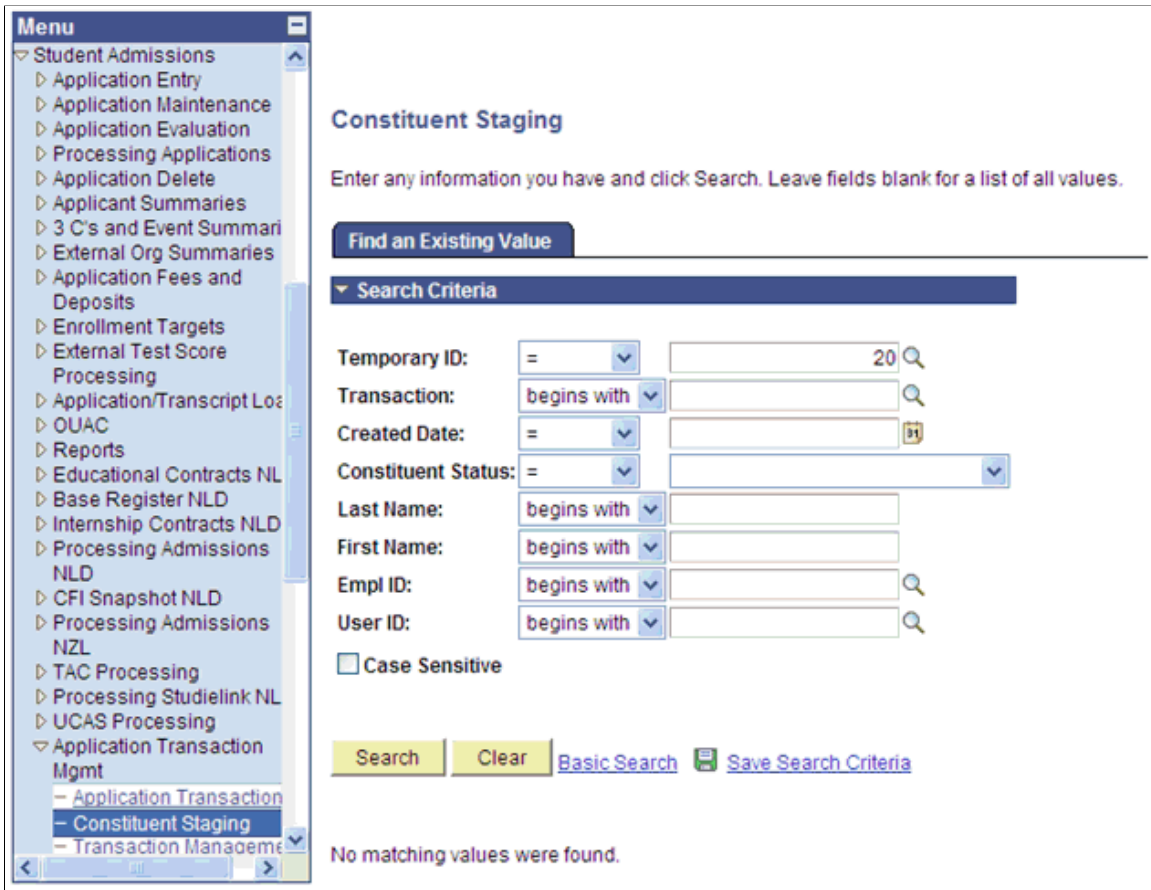
However, you can see how many applications exist for an applicant. In the following example, a user can see there is one application for the constituent. However, the user cannot view the application data because the <Transaction Name> link is disabled. The system has disabled the link because the user 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.



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.



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.



<b>Field or Control</b>	<b>Description</b>
<b>Constituent Staging</b>	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

Temporary ID: 3 User ID: Created Datetime: 20/06/2011 9:14AM Created By: <a href="#">Constituent Staging</a>	Name: Jamison, Susan Constituent Status: Ignore ID: <input type="button" value="Run Search/Match/Post"/>
--	---

*Institution: PeopleSoft University	Academic Career: Undergraduate
Application Nbr: 00024795	Application Status Date: 20/06/2011
Application Status: Submitted	<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	Exp. Graduation Term: <input type="text"/>
*Admit Term: 0670 2011 Fall	*Academic Load: Full-Time
*Academic Program: LAU Liberal Arts Undergraduate	*Campus: MAIN Main
Academic Shift: <input type="text"/>	

Program Enrollment

Cohort Tag: <input type="text"/>	APT Instance: <input type="text"/>
Year of Program: 1st Year	

Last Updated On: 20/06/2011 9:14:34AM      Last Updated By: SAMPLE

Plan Data
Find | View All
First 1 of 1 Last

*Academic Plan: BIOLBS Biology (BS)	*Plan Sequence: 1
Last Updated On: 20/06/2011 9:14:34AM	Last Updated By: SAMPLE

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

*Sub-Plan: <input type="text"/>	
Last Updated On:	Last Updated By:



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:
Waiver Basis Code:	Application Fee Paid: 50.00
Last School Attended:	Waive Amount:
Graduation Date:	<a href="#">Additional Fields</a>
<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.

<b>Recruiting Categories</b> <span style="float: right;">Find   View All    First <input type="checkbox"/> 1 of 1 <input type="checkbox"/> Last</span>	
*Recruitment Category: <input type="text"/>	Sub-Category: <input type="text"/>
Last Updated On:	Last Updated By:
<b>Recruiters</b> <span style="float: right;">Find   View All    First <input type="checkbox"/> 1 of 1 <input type="checkbox"/> Last</span>	
*Recruiter ID: <input type="text"/>	<input type="checkbox"/> Primary Flag
Last Updated On:	Last Updated By:
<b>Student Response</b> <span style="float: right;">Find   View All    First <input type="checkbox"/> 1 of 1 <input type="checkbox"/> Last</span>	
*Sequence number: <input type="text"/>	*Response Date: 09/09/2013 <input type="text"/>
External Org ID: <input type="text"/>	Description: <input type="text"/>
*Response Reason: <input type="text"/>	
Last Updated On:	Last Updated By:
<b>Other Institutions</b> <span style="float: right;">Find   View All    First <input type="checkbox"/> 1 of 1 <input type="checkbox"/> Last</span>	
School: 000010001 <input type="text"/>	Falls Valley High School
Location: 1	
School Type: Secondary	Proprietorship: Public
City: Mission Hills	State: CA    Country: USA
Last Updated On:	Last Updated By:
<b>Source of Interest</b> <span style="float: right;">Find   View All    First <input type="checkbox"/> 1 of 1 <input type="checkbox"/> Last</span>	
Referral Source: EVNT <input type="text"/>	Campus Event

For documentation about many of the fields on this page:

See [Adding New Applications Manually](#)

<b>Field or Control</b>	<b>Description</b>
<b>Set Status to Submitted</b>	<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"> <li>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.</li> <li>2. Click the Set Status to Submitted button and save the record.</li> <li>3. Click the Set to Update ID button and select the existing ID.</li> <li>4. Click the Run Search/Match/Post button to post the application.</li> </ol>
<b>Application Status</b>	<p>Indicates the status of the application transaction.</p> <hr/> <p><b>Note:</b> 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/>

<b>Application Status</b>	<b>Description</b>
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>

<b>Application Status</b>	<b>Description</b>
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	Name: Jamison, Susan			
User ID:	Constituent Status: Ignore			
Created Datetime: 20/06/2011 9:14AM	ID:			
Created By:	<a href="#">Run Search/Match/Post</a>			
<a href="#">Constituent Staging</a>				
*Institution: PeopleSoft University	Academic Career: Undergraduate			
Application Nbr: 00024795	Application Status Date: 20/06/2011			
Application Status: Submitted	<a href="#">Expand All</a>	<a href="#">Collapse All</a>		
<b>Program Data</b> <span style="float: right;">Find   View All First 1 of 2 Last</span>				
Program Number: 1	*Academic Program: LAU			Lib Arts
<b>Program Attributes</b> <span style="float: right;">Find First 1 of 1 Last</span>				
*Attribute Rank on Wait List				
	10			
<input checked="" type="checkbox"/> Show in Student SS				
<b>Plan Data</b> <span style="float: right;">Find   View All First 1 of 1 Last</span>				
*Academic Plan: BIOLBS				
<b>Plan Attributes</b> <span style="float: right;">Find First 1 of 1 Last</span>				
*Attribute Student Language				
SP	Spanish			
<input checked="" type="checkbox"/> Show in Student SS				
<b>Sub-Plan Data</b> <span style="float: right;">Find   View All First 1 of 1 Last</span>				
*Sub-Plan: PHOTO	Photo Biology			
<a href="#">Attributes</a>				

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	<a href="#">Run Search/Match/Post</a>	

[Constituent Staging](#)

*Institution:	PeopleSoft University	Academic Career:	Undergraduate Engineering
Application Nbr:	00024894	Application Status Date:	11/09/2011
Application Status:	Submitted	<a href="#">Expand All</a> <a href="#">Collapse All</a>	

School Information
Find | View All
First 1 of 3 Last

Sequence Number:	1		
External Org ID:	000010001	Falls Valley High School	
School Name:	<input type="text"/>		
School Country:	<input type="text"/>		
School Address:	<input type="text"/>		
School City:	<input type="text"/>		
School State:	<input type="text"/>	School Postal:	<input type="text"/>
School CEEB Code:	<input type="text"/>	School ACT Code:	<input type="text"/>
<input type="checkbox"/> Home School		<input type="checkbox"/> 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
Term Type:	Semester	External Term:	FALL
Term Year:	2000	Academic Level:	Senior
From Date:	08/01/2000	To Date:	05/15/2004
Last Updated On: 03/05/2012 9:55:09AM		Last Updated By: SSADM215	

Transcript Status
Find | View All
First 1 of 1 Last

*Action	Transcript Date	Date Received	Transcript Type	Transcript Status	Data Source	Data Medium
Received	01/22/2010	01/22/2010	Official	Final	Self-Rpted	Hard Copy

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

Term	GPA/Units	Rank	Audit
*Summary Type	External Term	Ext Year	Acad Level
1 Grade 12	Fall	2000	Senior
2 HS Overall	Fall	2000	Senior

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-Rpted	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																		
<b>Temporary ID:</b> 602 <b>User ID:</b> SSADM340 <b>Created Datetime:</b> 04/27/2010 7:41AM <a href="#">Constituent Staging</a>	<b>Name:</b> Billingsley, Mandy <b>Constituent Status:</b> Loaded <b>ID:</b> <input type="button" value="Run Search/Match/Post"/>	<b>Institution:</b> PeopleSoft University <b>Academic Career:</b> Undergraduate <b>Application Nbr:</b> 00025088 <b>Application Status:</b> Submitted <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>																			
<b>Test Results</b> Find   View All First 1 of 1 Last <b>*Test ID:</b> SAT I Scholastic Assessment Test I <b>Last Updated On:</b> 04/27/2010 7:41:41AM <b>Last Updated By:</b> SSADM340 <table border="1"> <thead> <tr> <th>Test Component</th> <th>Others</th> <th>Audit</th> <th colspan="3"></th> </tr> <tr> <th>*Test Component</th> <th>Test Score</th> <th>%ile</th> <th>*Test Date</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1 ES</td> <td>7.00</td> <td></td> <td>05/01/2009</td> <td>+</td> <td>-</td> </tr> </tbody> </table>				Test Component	Others	Audit				*Test Component	Test Score	%ile	*Test Date			1 ES	7.00		05/01/2009	+	-
Test Component	Others	Audit																			
*Test Component	Test Score	%ile	*Test Date																		
1 ES	7.00		05/01/2009	+	-																
<b>Academic Interests</b> Find   View All First 1 of 1 Last <b>*Academic Career:</b> UGRD Undergraduate <b>Last Updated On:</b> 04/27/2010 7:41:41AM <b>Last Updated By:</b> SSADM340 <table border="1"> <thead> <tr> <th>Academic Interests</th> <th>Audit</th> <th colspan="4"></th> </tr> <tr> <th>*SeqNum</th> <th>Subject Area</th> <th>*Description</th> <th>*Data Source</th> <th>Priority</th> <th></th> </tr> </thead> <tbody> <tr> <td>1 1</td> <td>BIOL</td> <td>Biology</td> <td>Self-Rpted</td> <td>1</td> <td>+</td> </tr> </tbody> </table>				Academic Interests	Audit					*SeqNum	Subject Area	*Description	*Data Source	Priority		1 1	BIOL	Biology	Self-Rpted	1	+
Academic Interests	Audit																				
*SeqNum	Subject Area	*Description	*Data Source	Priority																	
1 1	BIOL	Biology	Self-Rpted	1	+																

## 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	Constituent Status: <input type="text" value="Suspended"/>	ID: <input type="text" value="Run Search/Match/Post"/>
User ID: SSADM215	Created Datetime: 03/05/2012 9:55AM	Created By: SSADM215	<a href="#">Constituent Staging</a>
*Institution: PeopleSoft University	Application Nbr: 00024897	Application Status: <input type="text" value="Submitted"/>	Academic Career: Undergraduate Engineering
			Application Status Date: 03/05/2012
			<input type="button" value="Expand All"/> <input type="button" value="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:  Undergraduate Essays

\*Material Type:  Essay

\*Material Nbr:   Checklist Item Update

Date Received:  Date Recorded:

Essay Topic:  Personal Statement

Comments:

Last Updated On: 03/05/2012 9:55:09AM Last Updated By: SSADM215

File Attachments Personalize | Find | View All | First 1 of 1 Last

Attached File	Description	View
Essay.doc	Essay.doc	<input type="button" value="View"/>

File Attachments Personalize | Find | View All | First 1 of 1 Last

Attached File	Description	View
personal_statement.doc	personal_statement.doc	<input type="button" value="View"/>

## 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).

<b>Application Data</b>		<b>Education History</b>		<b>Additional Academic Info</b>		<b>Supplemental Information</b>		<b>Candidature Details</b>	
Temporary ID:	5	Name:	Brinton, Lene						
User ID:	CJR100	Constituent Status:	Loaded						
Created Datetime:	02/27/2012 8:11AM	ID:	0065						
Created By:	CJR100			<input type="button" value="Run Search/Match/Post"/>					
<a href="#">Constituent Staging</a>									
*Institution:	PeopleSoft University	Academic Career:	Medical School						
Application Nbr:	00024847	Application Status Date:	02/27/2012						
Application Status:	Submitted			<input type="button" value="Expand All"/>		<input type="button" value="Collapse All"/>			
Academic Program:	Medicine	Candidate Number:	000000000002						
Academic Plan:	Animal Testing Research 1								
<a href="#">Attachments (0)</a>									
<b>Consumption</b>				Find   View All		First 1 of 1 Last			
Earliest Submission Date:	11/30/2011								
Final Submission Date:	12/30/2011								
*Consumption Load:	80								
Status:	CHANGE			<input type="button" value="Change Requested"/>					
Status Date:	02/08/2012								

This example illustrates the fields and controls on the Candidature Details page (2 of 3).

<b>Research Topic</b>				Find   View All		First 1 of 1 Last			
*Topic Sequence:	1	<input type="button" value="Topic Search"/>		<input type="button" value="Create Topic"/>		<a href="#">Attachments (0)</a>			
<b>Topic Details</b>				Find   View All		First 1 of 1 Last			
Topic Code:	RT0002								
Research Topic:	<p>New Surgical Techniques for Left handers</p>								
Topic Description:	<p>&nbsp;&A&nbsp;&nbsp;review of technical procedures for left handed surgery</p>								
Thesis Title:	<p>&nbsp;&nbsp;Left Handed Sugery</p>								
Status:	P			<input type="button" value="Proposal Submitted"/>					
*Status Date:	02/08/2012								

This example illustrates the fields and controls on the Candidature Details page (3 of 3).

The screenshot displays the 'Candidature Details' page, divided into two main sections: 'Supervisors' and 'Assignment'.

**Supervisors Section:**

- Supervisor Sequence:** 1
- Attachments:** (0)
- Supervisor Search:** A search box containing 'FA0802' and 'Kabahit,Joel'.
- Advisory Committee:** FELLOW (Fellowship)
- Supervision Percentage:** 100.00
- \*Supervisor Type:** PSUP (Primary Supervisor)
- Start Date:** 09/01/2011
- End Date:** 02/29/2012
- Funding Percentage:** 100.00
- Budget Department:** CHEMISTRY
- Academic Organization:** CHEMISTRY
- \*Status Date:** 02/08/2012
- Status:** REVIEW (Review in Progress)

**Assignment Section:**

- Assignment:** AN (Animal Testing Clearance)
- Attachments:** (0)
- Approver ID:** (Empty)
- 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

Program Data
Find | View All
First 1 of 1 Last

Program Number 0
Effective Date 23/09/2013

Admit Term 0781 2017 Sem1
Effective Sequence 1

Academic Program

\*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

VET Course Assurance Indicator E619

Primary field of research code E594

Secondary field of research code E595

Program Data
Find | View All
First 1 of 1 Last

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)





## Chapter 9

# Using File Parser for Loading Applications

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## 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:

Transaction Description: 

This transaction code is used ONLY for testing File Parser - AAWS Transactions

\*Transaction Status:

\*Data Update Rule:

Transaction Options

Online Transaction    Process Search/Match:     Batch  
 Realtime

Transaction Handler

\*Root Package ID:

\*Path:

\*Application Class ID:

Transaction Status and Date

\*Staged Record Name:  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:

---

**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"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	No, off-campus with other fami	C	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
3	No, off-campus with parents	C	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
4	Yes, on-campus	H	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

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:

“Step 1: Creating or Extending Staging Tables” (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:

---

**Staging Table Records** Find | View All | First 1 of 36 Last

\*Record:     + -

Parent Record:

---

**Staging Table Fields** Personalize | Find | View: 10 | 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).

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	Default Value	<input checked="" type="checkbox"/>	LD		Upper												
12	SCC_STG_STS_DT	Date	Default Value	<input checked="" type="checkbox"/>	%Date		MMDDYYYY						01						
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		Upper												
17	SCC_ROW_ADD_DTTM	DTTM	Default Value	<input type="checkbox"/>	%DateTime														
18	SCC_ROW_UPD_OPRID	Char	Default Value	<input type="checkbox"/>	%OperatorID		Upper												
19	SCC_ROW_UPD_DTTM	DTTM	Default Value	<input type="checkbox"/>	%DateTime														

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
<b>Map Name</b>				
*Map Name	MAPPING EXAMPLE	*Status	Active	
*Context Definition	Context Example			
*File Type	Delimited	*Delimiter	Pipe	*Qualifier
Conversion Definition	Conversion Example			
	<input type="checkbox"/> 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.

The screenshot shows the 'File Layout' tab of a software application. At the top, there are navigation tabs: 'File Definition', 'File Layout' (selected), 'Mapping', 'Preview Layout', and 'Preview Data'. Below the tabs, the 'Map Name' is 'MAPPING EXAMPLE'. The 'Row Types' section shows 'MAPPING EXAMPLE' and 'Staging Table' with a dropdown menu and a 'Load Fields' button. The main area is a table titled 'File Fields' with the following data:

*Sort Order	File Field Name	Field Number	Field Type	Field Format	Trim	Date Separator	Date Day	Date Month	Decimal Position
1	First Name	1	Character	Proper	<input type="checkbox"/>				
2	FIRST_NAME_SRCH	1	Character	Upper	<input type="checkbox"/>				
3	Middle Name	2	Character	Proper	<input type="checkbox"/>				
4	Last Name	3	Character	Proper	<input type="checkbox"/>				
5	LAST_NAME_SRCH	3	Character	Upper	<input type="checkbox"/>				
6	Suffix	4	Character		<input type="checkbox"/>				
7	Sex	5	Character		<input type="checkbox"/>				
8	Former Last Name	6	Character	Proper	<input type="checkbox"/>				
9	FORMER_LAST_NAME_SRCH	6	Character	Upper	<input type="checkbox"/>				
10	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.

The screenshot shows the 'Mapping' tab of the software application. At the top, there are navigation tabs: 'File Definition', 'File Layout', 'Mapping' (selected), 'Preview Layout', and 'Preview Data'. Below the tabs, the 'Map Name' is 'MAPPING EXAMPLE'. The 'Row Types' section shows 'MAPPING EXAMPLE'. The main area is a table titled 'Field Mapping' with the following data:

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 displays the 'Preview Data' page for a mapping example. The page is organized into several sections:

- Navigation:** Tabs for File Definition, File Layout, Mapping, Preview Layout, and Preview Data.
- Map Information:** Map Name: MAPPING EXAMPLE; Attached File: Jan\_2012\_Blank\_Fields.csv. Buttons: Preview Data, Add Attachment, Delete Attachment, View Attachment.
- Row Types:** Row Type: MAPPING EXAMPLE. Navigation: Find, First, 1 of 1, Last.
- Field Mapping:** Record: SCC\_STG\_CONSTIT; Row: 1. Navigation: Find, View 100, First, 1 of 102, Last.
- Field Values:** A table with 14 rows of data for the record 'SCC\_STG\_CONSTIT'. Navigation: Personalize, Find, View 10, First, 1-14 of 14, Last.

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	

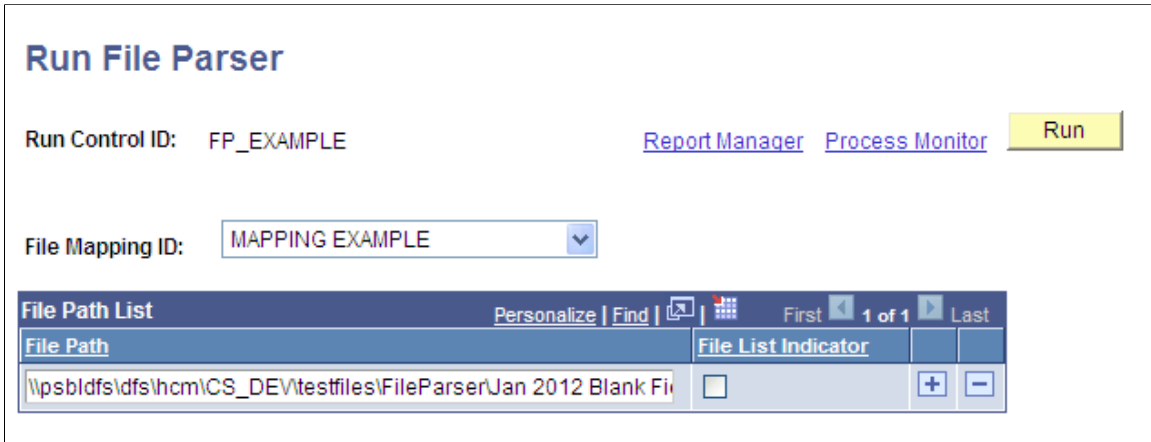
## Running the File Parser Process

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.



---

## 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.



## 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(&ResultsField In As
SCC_FILE_PARSER:MODEL:Results:ResultsField, &ResultsCollection In
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
  /* &ResultsField In as SCC_FILE_PARSER:MODEL:Results:ResultsField, */
  /* &ResultsCollection In 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

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## 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)

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## 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.

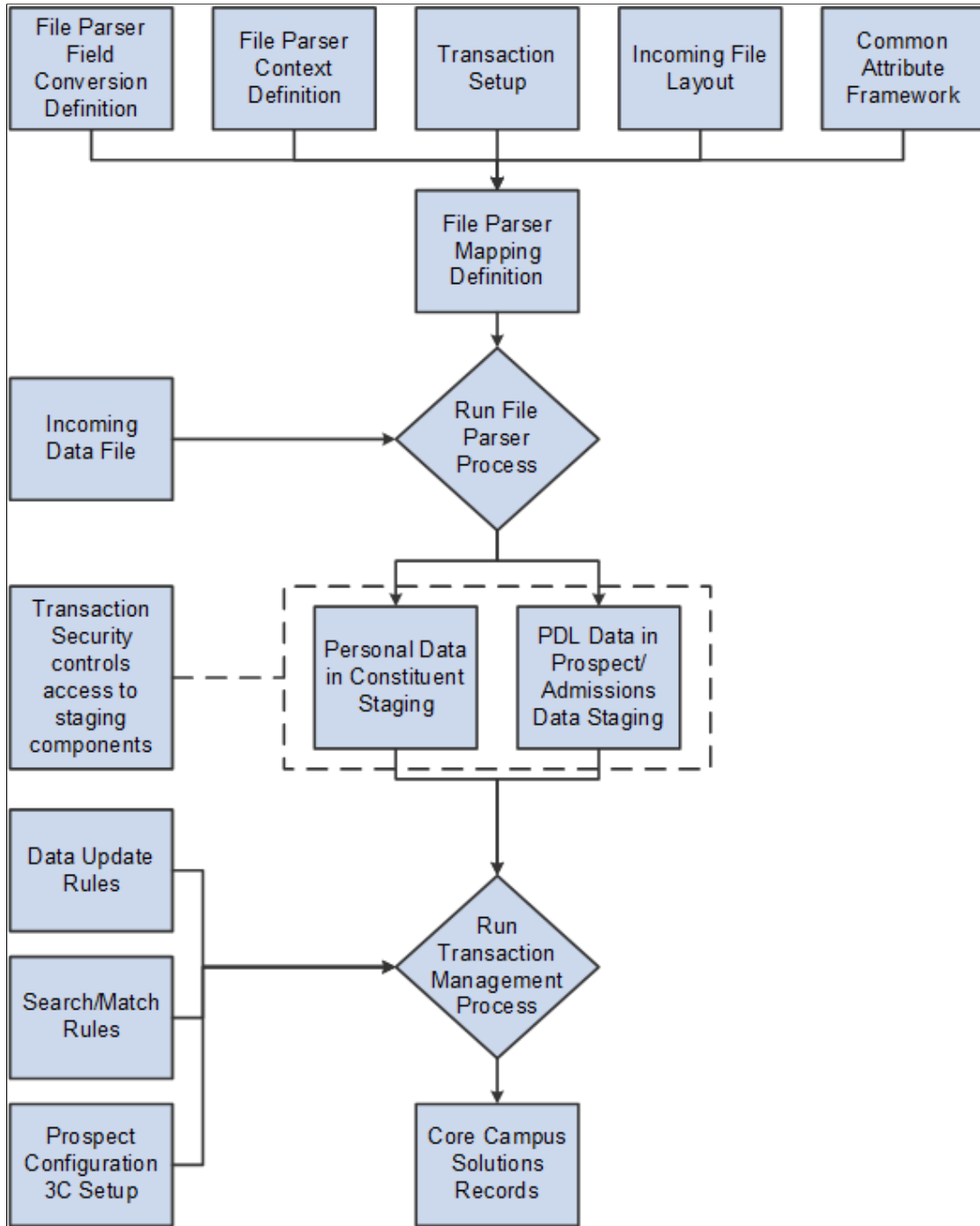
---

**Important!** Campus Solutions will no longer update the individual test load after its related PDL template has been delivered.

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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:

<b>Steps</b>	<b>More Information</b>
<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 <a href="#">Configuring PDL Setup</a></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 <a href="#">Setting Up Prospect Configuration</a></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 <a href="#">Setting Up File Parser for PDL</a></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 <a href="#">Reviewing and Editing Staged PDL Transactions</a></p> <p>See the discussion on Constituent Staging component in the Campus Community – Constituent Transaction Management documentation.</p>

<b>Steps</b>	<b>More Information</b>
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 <a href="#">Posting PDL Transactions</a></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

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**Note:** If EIPs are active, they are automatically published when you run the Transaction Management process.

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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)

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## 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:

<b>Entity Name</b>	<b>Staging Record Names</b>	<b>Production Record Names</b>
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

<b>Entity Name</b>	<b>Staging Record Names</b>	<b>Production Record Names</b>
*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_CRSCOM
*External Course Grade	SCC_STG_CRSGRD	SAD_EXT_CRSGRD
*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*

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## 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:

<b>Entity</b>	<b>Rules</b>
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>

<b>Entity</b>	<b>Rules</b>
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' tab in the PeopleSoft interface. The 'Transaction' is 'SAD\_PTE'. The '\*Transaction Name' is 'PTE Test Score Load'. The 'Transaction Description' is 'PTE Test Score Load'. The '\*Transaction Status' is 'Active'. The '\*Data Update Rule' is 'DEFAULT\_UPDATE\_RULE'. Below these fields is a 'Transaction Options' section with the following settings: 'Online Transaction' is unchecked, 'Process Search/Match' is checked, 'Batch' is selected with a radio button, and 'Realtime' is unselected with a radio button.



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 <small>Common Data Header record.</small>
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 <small>Prospect Data Load Menu</small>
Menu Bar Name:	USE <small>Use</small>
Menu Item Name:	SAD_PDL_DATA_STG <small>Prospect/Admissions Staging</small>
Menu Page Name:	SAD_PDL_ACAD_INFO <small>Constituent Summary Page</small>

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.

<b>Root Package ID</b>	<b>Path</b>	<b>Application Class ID</b>
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.

<i>Root Package ID</i>	<i>Path</i>	<i>Application Class ID</i>
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.

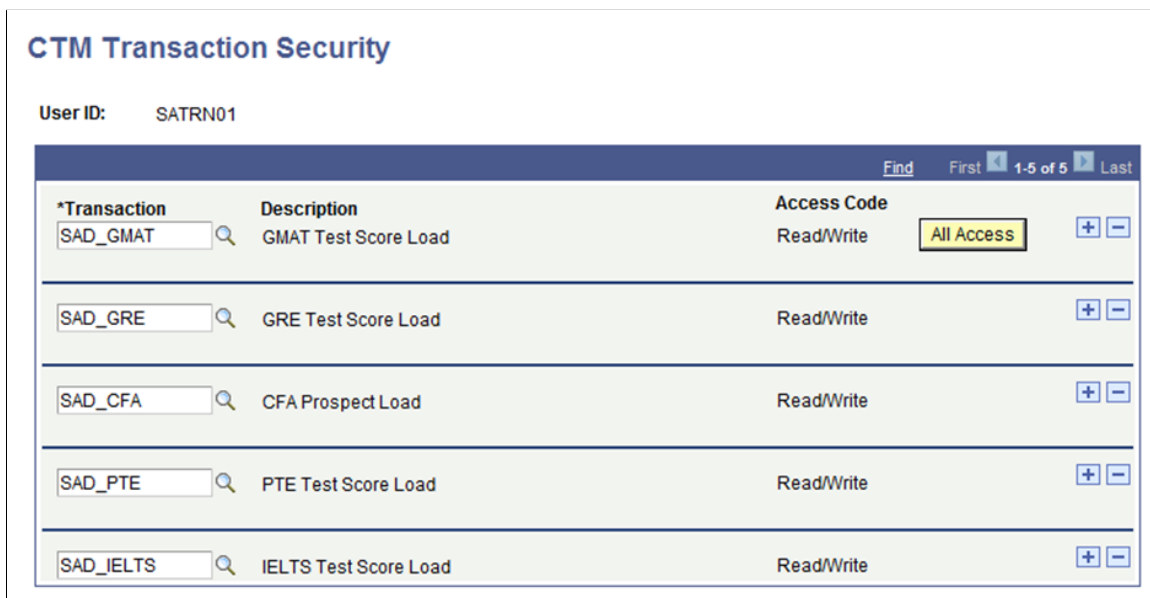
<i>Menu Name</i>	<i>Menu Bar Name</i>	<i>Menu Item Name</i>	<i>Menu Page Name</i>
SAD_PDL_DATA_STAGE	USE	SAD_PDL_DATA_STG	SAD_PDL_ACAD_INFO

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 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:**

**Status:**

**Entity Type:**

**Description:**

**AppClass:**

**Prod Record:**

**Stage Record:**

**Element (XML):**

**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	<input type="checkbox"/>	0	0		View + -

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.

The screenshot displays the 'Record Context' configuration interface. At the top, there are two tabs: 'Record Context' (selected) and 'Secondary Page Options'. A 'Delete Record Context' button is located in the top right. The main form contains the following fields and sections:

- Record (Table) Name:** ADM\_PRSPCT\_CAR
- \*Description:** Prospect Attributes
- \*Attribute Record:** SAD\_PRSPCT\_CAF (linked to Prod Prospect Attrb)
- Override Prompt Table:** SADPDLPRSCAF\_VW (linked to Prospect Attribute Prompt)
- Extend to staging record**
- Staging Record:** SAD\_PRS\_CAR\_STG (linked to Prospect Career)
- Staging Attribute Record:** SAD\_STG\_PRS\_CAF (linked to Stg Prospect Attrb)
- Entity Name:** Prospect CAF
- Attribute Filter Class:** (empty)
- Attribute Display Type:**  Inline Subpage,  Secondary Page
- Copy Attributes from:** (empty) with a 'Copy' button
- Attributes Section:**
  - Find | View All | First 1 of 7 Last
  - \*Attribute Sequence: 1
  - Status: Active
  - \*Common Attribute: CFA\_CLASSRANK (linked to Class Rank)
  - Required  Repeatable
  - Entity Associations

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 shows the 'Record Context' configuration page for the table SAD\_TESTDT. The page is divided into several sections:

- Record Context:** Contains fields for Record (Table) Name (SAD\_TESTDT), \*Description (Test Score Loads), \*Attribute Record (SAD\_TESTDT\_CAF), Override Prompt Table (SAD\_TSTIDCAF\_VW), Staging Record (SCC\_STG\_TESTDT), Staging Attribute Record (SAD\_STG\_TST\_CAF), Entity Name (Test CAF), and Attribute Filter Class (SAD\_PDL\_PROCESS:CAF\_Filters:PDL\_Field\_Filter). A 'Delete Record Context' button is visible in the top right.
- Attribute Display Type:** Radio buttons for 'Inline Subpage' (selected) and 'Secondary Page'.
- Copy Attributes from:** A search field and a 'Copy' button.
- Attributes:** A table with columns for \*Attribute Sequence (1), \*Common Attribute (IELTS\_DOWNLOADID), and Status (Active). There are also checkboxes for 'Required' and 'Repeatable', and a link for '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.

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See [Delivered PDL Templates](#)

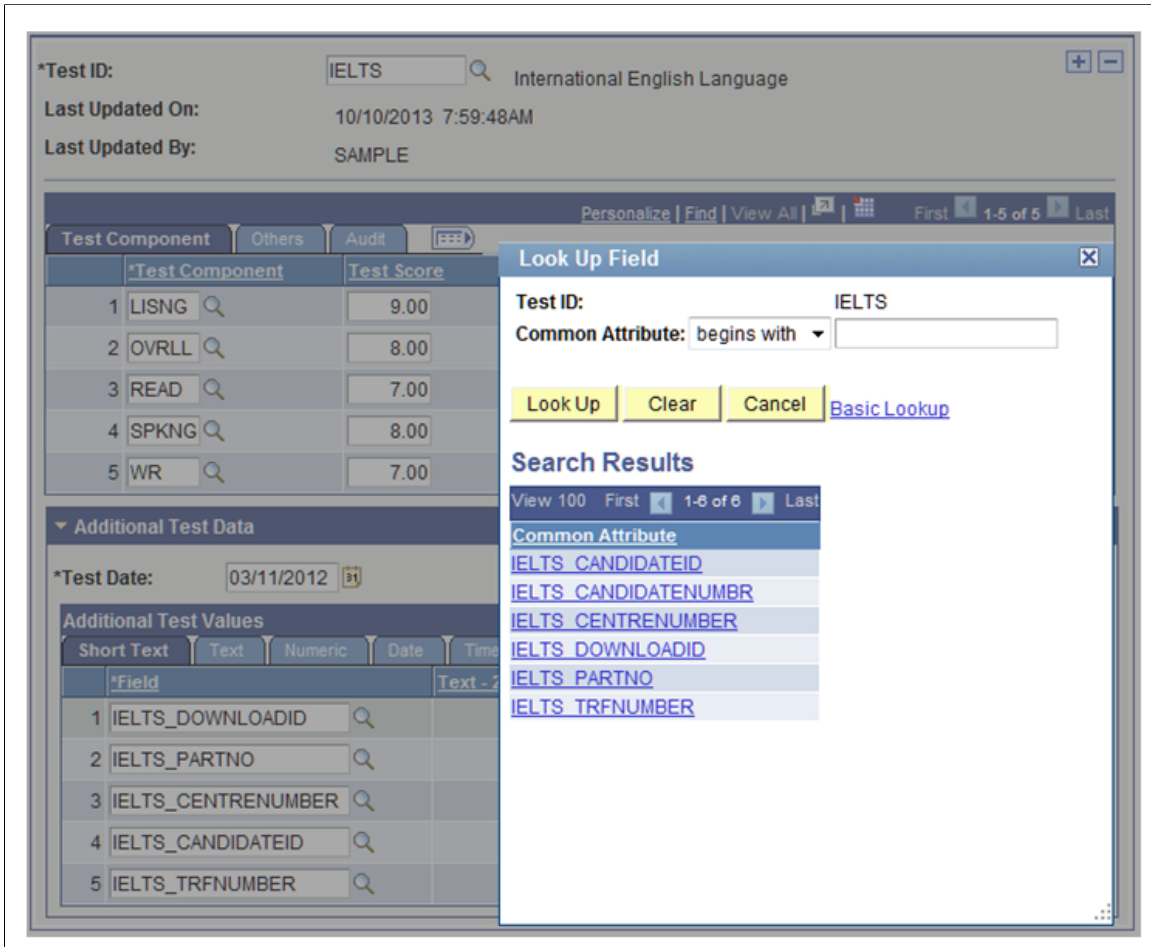
## Setting Up Filtering for Common Attributes

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.

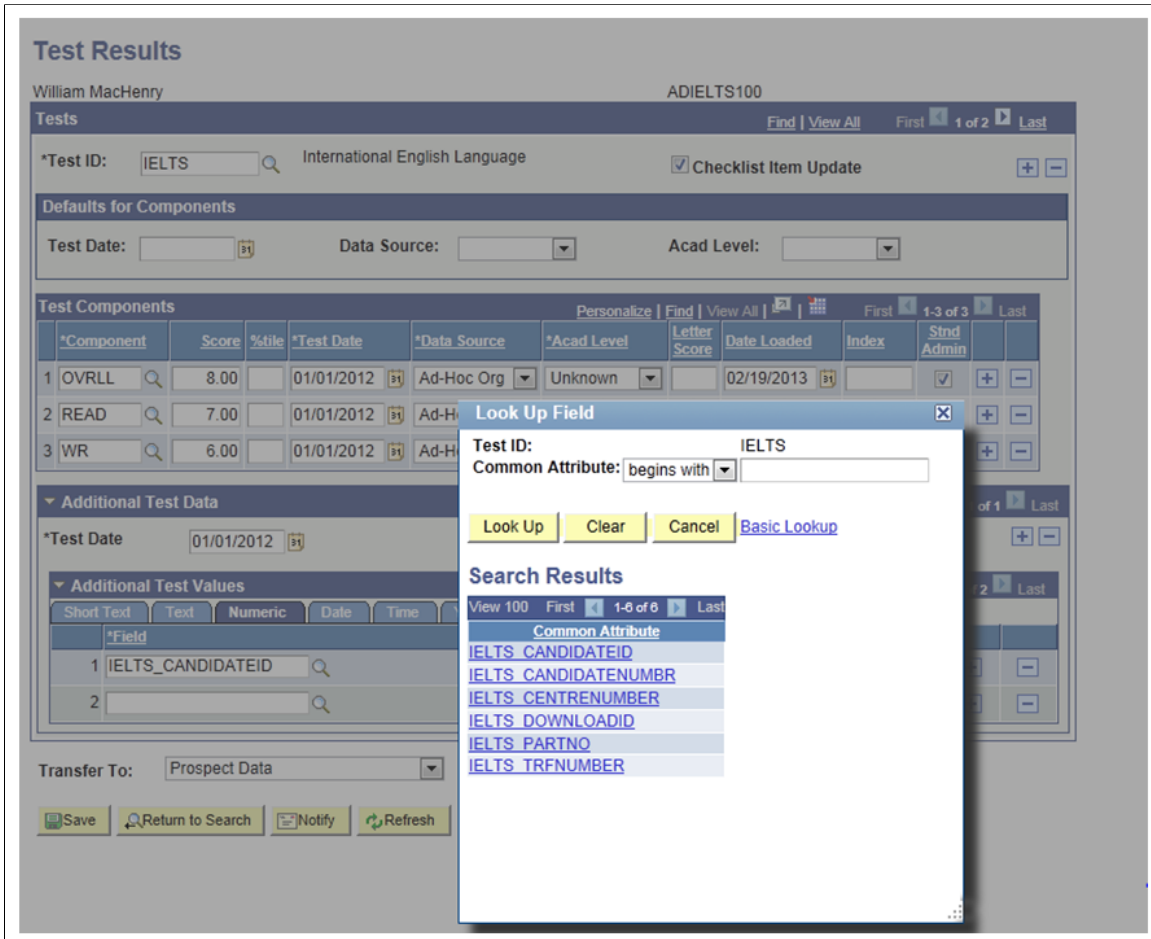
This is an example of the Test Results group box when the user clicks the lookup button for Field in Additional Test Values:

This image illustrates an example of filtering based on Test ID in the Academic Information page.



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.



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.

- Expand the Entity Associations group box. The group box should look like this:

This example illustrates the Entity Associations group box.

- 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

Look Up
Clear
Cancel
Basic Lookup

### Search Results

View 100
First ◀ 1-31 of 31 ▶ Last

Entity Name	Entity Description
<a href="#">Test ID ACT Assessment</a>	ACT : ACT Assessment
<a href="#">Test ID Advanced Placement</a>	AP : Advanced Placement
<a href="#">Test ID American Dental Associ</a>	ADA : American Dental Association
<a href="#">Test ID Candidate Referral Serv</a>	CRS : Candidate Referral Service
<a href="#">Test ID College Level Examinat</a>	CLEP : College Level Examination Prg
<a href="#">Test ID Dental Admission Test</a>	DAT : Dental Admission Test
<a href="#">Test ID Dutch as second langua</a>	NT2 : Dutch as second language
<a href="#">Test ID Educational Opportunit</a>	EOS : Educational Opportunity Svc
<a href="#">Test ID GMASS</a>	GMASS : GMASS
<a href="#">Test ID Grad Management Admiss</a>	GMAT : Grad Management Admission Test
<a href="#">Test ID Graduate Record Exam</a>	GRE : Graduate Record Exam
<a href="#">Test ID International Baccalau</a>	IB : International Baccalaureate
<a href="#">Test ID International English</a>	IELTS : International English Language
<a href="#">Test ID Law School Admission T</a>	LSAT : Law School Admission Test
<a href="#">Test ID Medical College Admiss</a>	MCAT : Medical College Admission Test
<a href="#">Test ID Ministry of Education</a>	MOE : Ministry of Education - NCEA
<a href="#">Test ID New South Wales</a>	UAC : New South Wales
<a href="#">Test ID Pearson Test of Enqlis</a>	PTE : Pearson Test of English
<a href="#">Test ID Queensland Tertiary Ad</a>	QTAC : Queensland Tertiary Admission
<a href="#">Test ID Scholastic Aptitude Te</a>	SATOL : Scholastic Aptitude Test (Old)
<a href="#">Test ID Scholastic Assessment</a>	SATII : Scholastic Assessment Test II
<a href="#">Test ID Scholastic Assessment</a>	SAT I : Scholastic Assessment Test I
<a href="#">Test ID Search PSAT/NMSQT Maj</a>	PSATS : Search PSAT/NMSQT Major
<a href="#">Test ID Search Advanced Placem</a>	APS : Search Advanced Placement
<a href="#">Test ID Search Scholastic Asse</a>	SATS : Search Scholastic Assessment I

7. For all those attributes prefaced with *IELTS*, add the Entity Name *Test ID International English*:

This example illustrates the Entity Name for IELTS.



- Repeat the above step for the remaining attributes.

---

**Note:** Remember to use the correct Entity Name that corresponds to those common attributes.

---

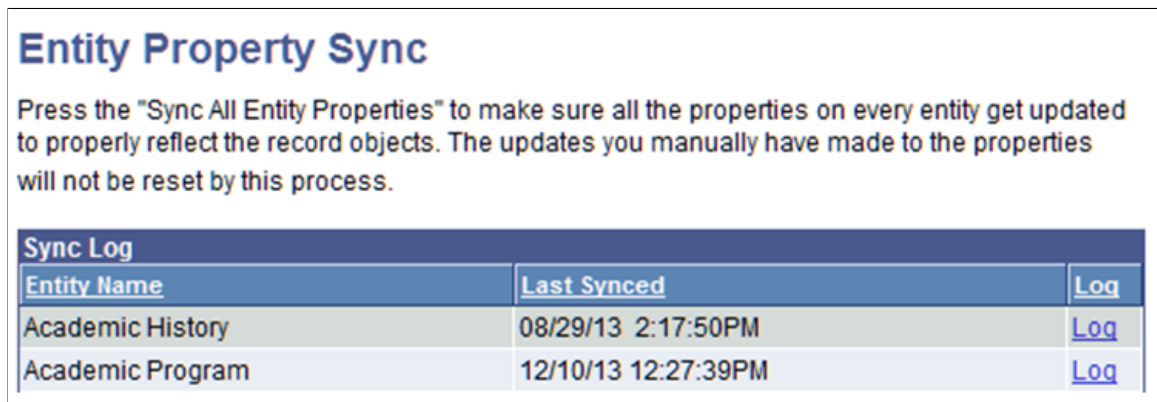
- Save your changes. When you save the changes, the system displays this message:

*Please run Entity Property Sync process to update corresponding Entity Registry definitions. (14097, 56)*

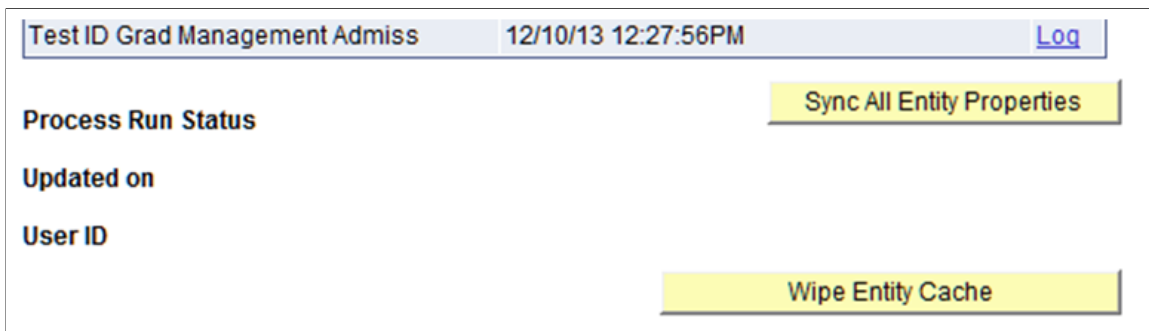
*The record context data has changed. To keep corresponding Entity Registry definitions in sync please run the Entity Property Sync process (Home > Setup SACR > System Administration > Entity > Entity Property Sync)*

- 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.
- 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).

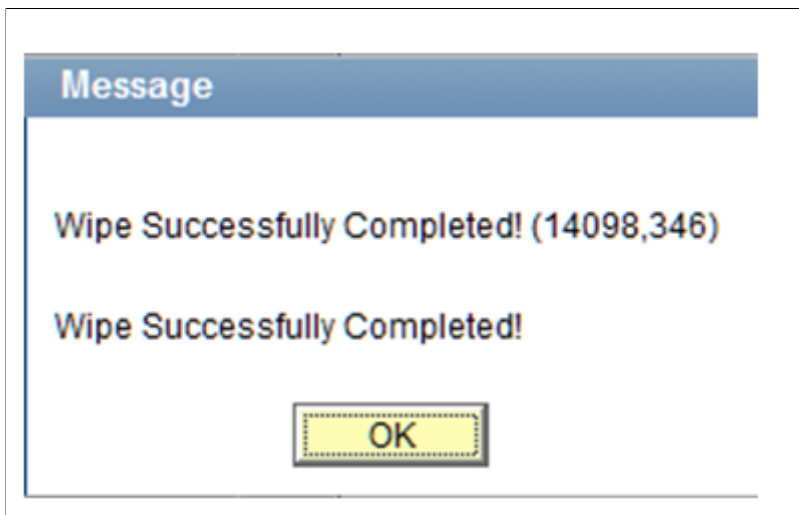


This example illustrates the Entity Property Sync component (2 of 2).



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

Page Name	Definition Name	Navigation	Usage
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. <b>Note:</b> 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 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 prospect 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					
Criteria					
*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.

	Recruiting Center	Description	Recruiting Status	Referral Source	Description		
1	BUSN	Graduate Business College	Prosper	GFRM	Graduate Forum	+	-
2	GRAD	Graduate - Central	Prosper	TSCR	Test Scores	+	-
3	GRMT	Graduate Math Department	Prosper	TSCR	Test Scores	+	-
4	GRMT	Graduate Math Department	Prosper	TSCR	Test Scores	+	-
5	UENG	Undergraduate Engineering	Prosper	INQ	Student Inquiry	+	-
6	UGRD	Undergraduate	Prosper	TSCR	Test Scores	+	-
7	UFAU	UGRD Fine Arts	Inquiry	FAIR	College Fair	+	-
8	UMUD	UGRD Music and Dance	Prosper	INQ	Student Inquiry	+	-
9	ULAU	UGRD Liberal Arts	Prosper	TSCR	Test Scores	+	-
10	UGRD	Undergraduate	Prosper	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

<b>Field or Control</b>	<b>Description</b>
<b>Career</b>	Enter the career for which you want to assign a recruiting center.
<b>Program</b>	Optionally, enter the program for which you want to assign a recruiting center.
<b>Plan</b>	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.

*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:

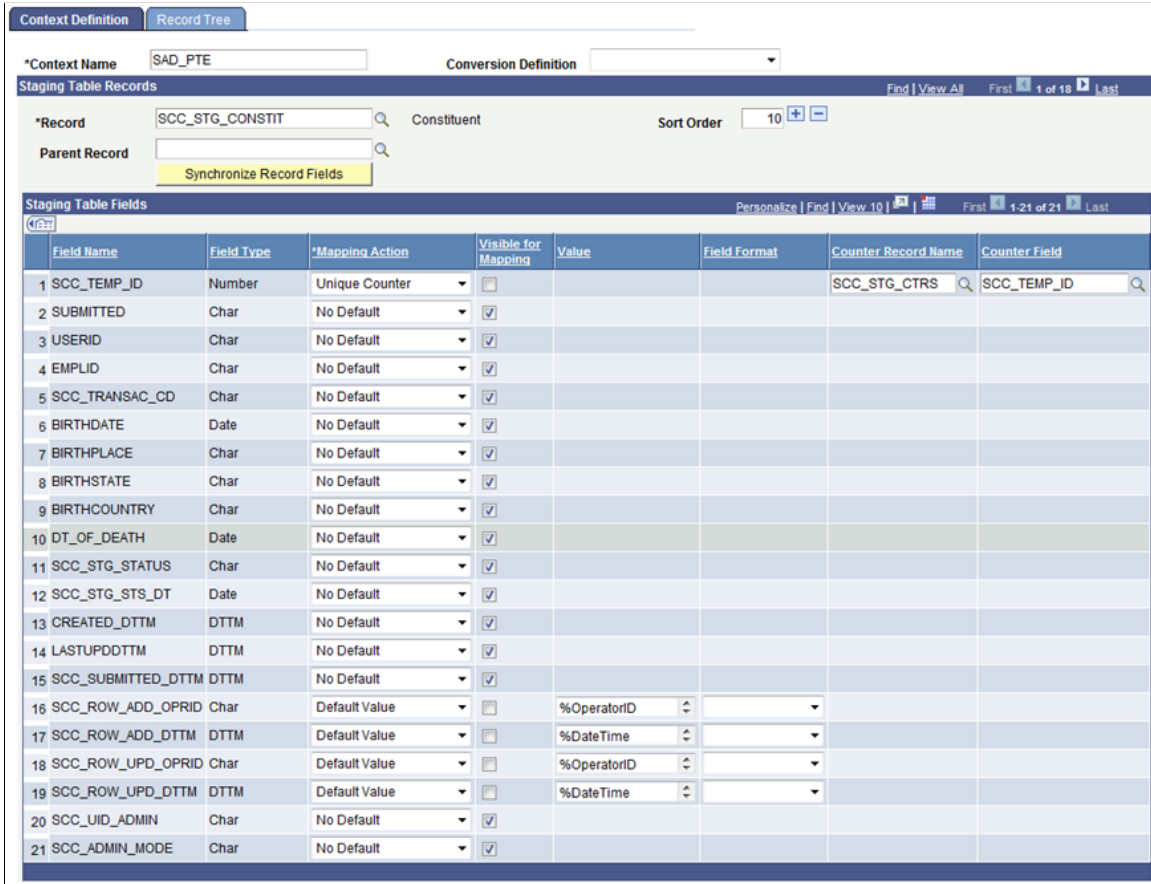
**Conversion Field Value** Personalize | Find | View All First 1-4 of 8 Last

	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.

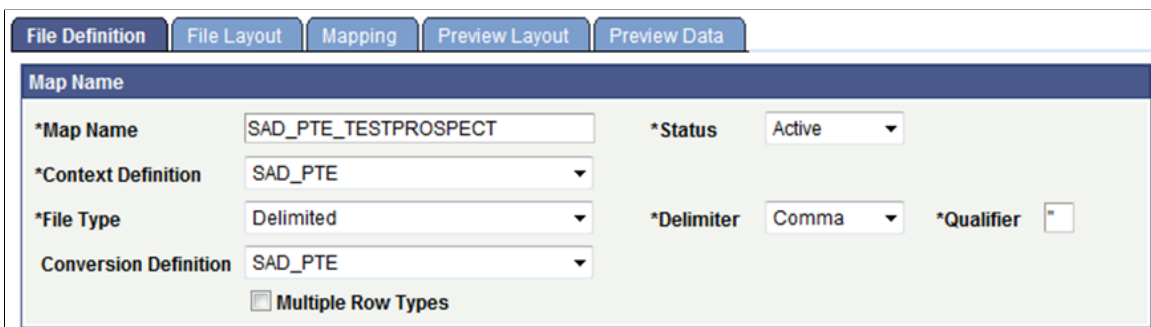


See “Setting Up Context Definitions” (Campus Community Fundamentals).

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.



**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.

*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	<input type="checkbox"/>		<input type="checkbox"/>
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 shows the 'Preview Data' tab in the PeopleSoft interface. At the top, there are navigation tabs: '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 main area is divided into sections: 'Row Types' (showing 'SAD\_PTE\_TESTPROSPECT'), 'Field Mapping' (showing 'SCC\_STG\_CONSTIT' and 'Row 1'), and 'Field Values'. The 'Field Values' section contains a table with 16 rows of data.

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)

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Academic Information	SAD_PDL_ACAD_INFO	<b>Student Recruiting &gt; Prospect/ Admissions Data Mgmt &gt; Prospect/ Admissions Staging &gt; Academic Information</b>	<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	<b>Student Recruiting &gt; Prospect/ Admissions Data Mgmt &gt; Prospect/ Admissions Staging &gt; Education History</b>	<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	<b>Student Recruiting &gt; Prospect/ Admissions Data Mgmt &gt; Prospect/ Admissions Staging &gt; Prospect Data</b>	<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	<b>Student Recruiting &gt; Prospect/ Admissions Data Mgmt &gt; Prospect/ Admissions Staging &gt; Supplementation Information</b>	<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

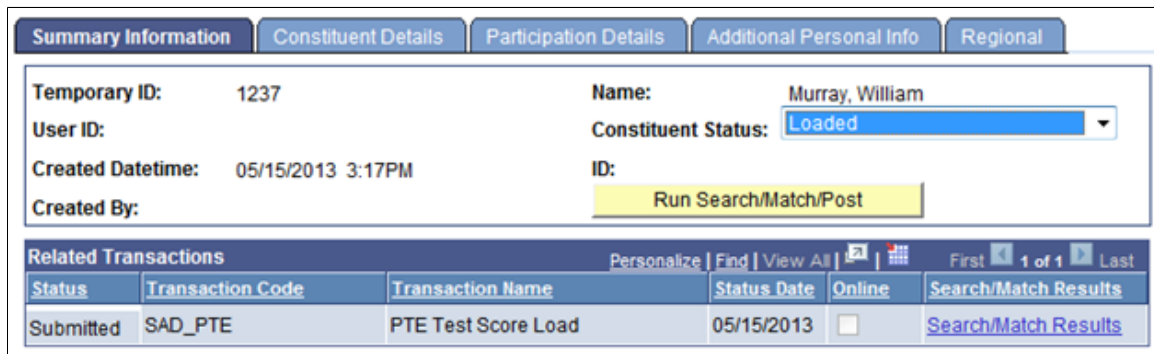
One of the methods to navigate to the Prospect/Admissions Staging component is by clicking the <transaction name> link on the Constituent Staging component. There are two ways to access the Constituent Staging component:

- 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.



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:	=	<input type="text"/>	🔍
Transaction:	begins with	<input type="text"/>	🔍
Transaction Status:	=	<input type="text"/>	▼
Status Date:	=	<input type="text"/>	📅
Constituent Status:	=	<input type="text"/>	▼
Created Date:	=	<input type="text"/>	📅
Last Name:	begins with	<input type="text" value="MURRAY"/>	
First Name:	begins with	<input type="text" value="WILLIAM"/>	
Empl ID:	begins with	<input type="text"/>	🔍
User ID:	begins with	<input type="text"/>	🔍

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

<p>Temporary ID: 1259</p> <p>User ID:</p> <p>Created Datetime: 05/15/2013 3:32PM</p> <p>Created By:</p> <p><a href="#" style="color: #4a7ebb; text-decoration: underline;">Constituent Staging</a></p>	<p>Name: <input type="text" value="Black, Billy"/></p> <p>Constituent Status: <input type="text" value="Loaded"/></p> <p>ID:</p> <p style="text-align: center; background-color: #ffff00; padding: 5px 20px;">Run Search/Match/Post</p>
--	---

<b>Field or Control</b>	<b>Description</b>
<b>Constituent Staging</b>	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:

[Constituent Staging](#)

Name: Builder, Blake

Constituent Status: Error

ID:

**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

**Test Results** Find | View All | First 1 of 1 Last

\*Test ID: IELTS International English Language

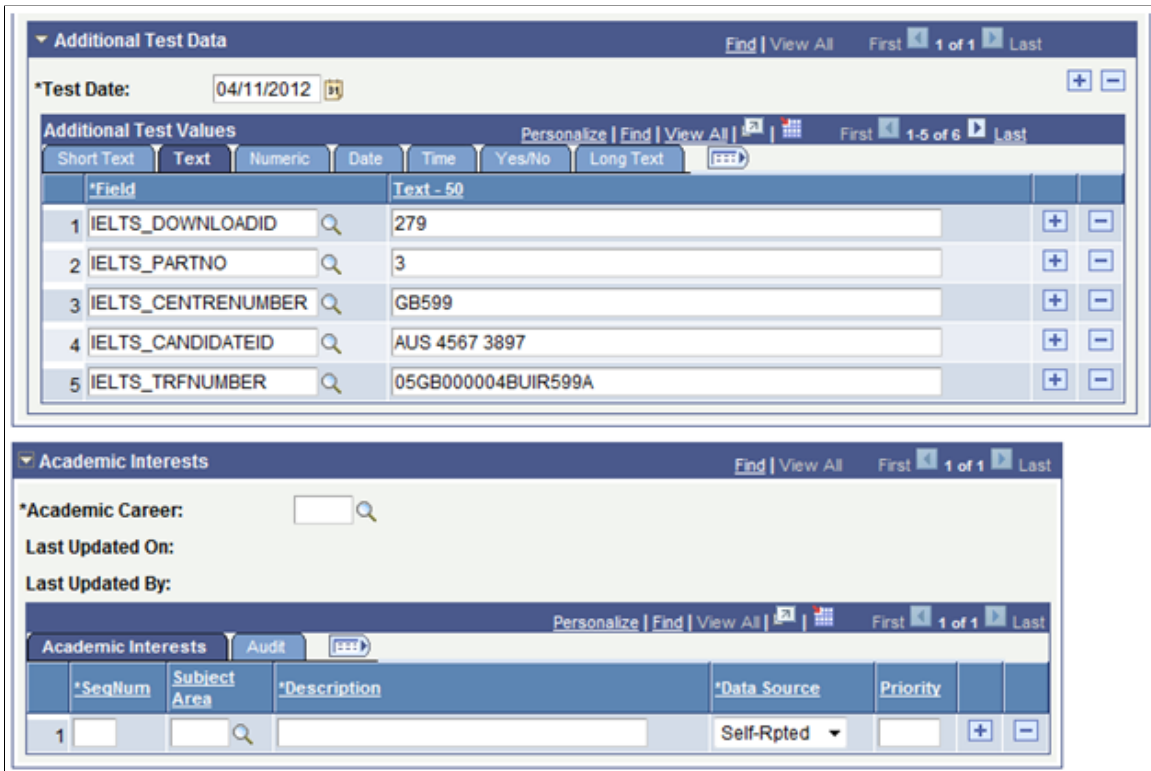
Last Updated On: 05/15/2013 2:49:08PM

Last Updated By: PS

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

Test Component	Others	Audit	*Test Component	Test Score	%tile	*Test Date		
1			LISNG	7.00		04/11/2012		
2			OVRL	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.



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 <b>Set Status to Submitted</b> 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"> <li>1. Click the <b>Set Status to Submitted</b> button and save the record.</li> <li>2. Click the <b>Set to Update ID</b> button and select the existing ID.</li> <li>3. Click the <b>Run Search/Match/Post</b> button to post the transaction.</li> </ol>

The following table describes the transaction statuses:

<b>Transaction Status</b>	<b>Description</b>
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 <b>Post Transaction Data</b> button or the <b>Run Search/Match/Post</b> button, or when you run the Transaction Management process.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Additional Test Data</b>	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.
<b>Academic Interests</b>	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: <a href="#">Constituent Staging</a>	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"/>
--	---

School Information
Find | View All
First 1 of 1 Last

Sequence Number:	<input type="text" value="1"/>	
External Org ID:	<input type="text" value="000010022"/> Southern High School	
School Name:	<input type="text" value="Southern High School"/>	
School Country:	<input type="text"/>	
School Address:	<input type="text"/>	
School City:	<input type="text" value="Denver"/>	
School State:	<input type="text"/>	School Postal: <input type="text"/>
School CEEB Code:	<input type="text" value="210785"/>	School ACT Code: <input type="text"/>
Last Updated On:	05/15/2013 3:32:20PM	<input type="checkbox"/> Home School
Last Updated By:	PS	<input type="checkbox"/> Last School

## 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: <a href="#">Constituent Staging</a>	Name: Weber, Angela Constituent Status: <span>Loaded</span> ▼ ID: <span>Run Search/Match/Post</span>		
Transaction Code: SAD_CFA Transaction Status: <span>Submitted</span> ▼	Transaction Name: CFA Prospect Load Status Date: 05/15/2013 <span>Expand All</span> <span>Collapse All</span>		
Prospect Career Data <span style="float: right;">Find   View All First 1 of 1 Last</span>			
*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:	▼		<input type="checkbox"/> Financial Aid Interest
Housing 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:	<input type="text"/>		
Region from:	▼		
Recruiter ID:	<input type="text"/>		
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 with the following sections:

- Additional Prospect Data:** A table with columns for Field, Text - 20, LOV, and Description. It lists five fields: CFA\_TEXTOK (Yes), CFA\_PARENTSGRAD (Y), CFA\_CLASSRANK (DontKnow), CFA\_PARENTSCOLLEGE, and CFA\_SCHLSETTINGPREF (Suburban).
- Program Data:** Includes fields for 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), and Last Updated By (PS).
- Plan Data:** Includes Academic Plan (ENGL-BA - English (BA)), Last Updated On (05/15/2013 3:32:20PM), and Last Updated By (PS).
- Sub-Plan Data:** Includes Sub-Plan, Last Updated On, and Last Updated By.
- Recruiting Categories:** Includes Category, Sub-Category, Last Updated On, and Last Updated By.
- Recruiters:** Includes Recruiter ID, Primary Flag, Last Updated On, and Last Updated By.

<i>Field or Control</i>	<i>Description</i>
<b>Additional Prospect Data</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>File Attachments</b>	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

<b>Temporary ID:</b>	=	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	
<b>Transaction:</b>	begins with	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text" value="SAD_PTE"/>	
<b>Transaction Status:</b>	=	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	<span style="font-size: 0.8em;">▼</span>
<b>Status Date:</b>	=	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	
<b>Constituent Status:</b>	=	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text" value="Error"/>	<span style="font-size: 0.8em;">▼</span>
<b>Created Date:</b>	=	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	
<b>Last Name:</b>	begins with	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	
<b>First Name:</b>	begins with	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	
<b>Empl ID:</b>	begins with	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	
<b>User ID:</b>	begins with	<span style="font-size: 0.8em;">▼</span>	<input style="width: 95%;" type="text"/>	

**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).

- 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

- 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 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.

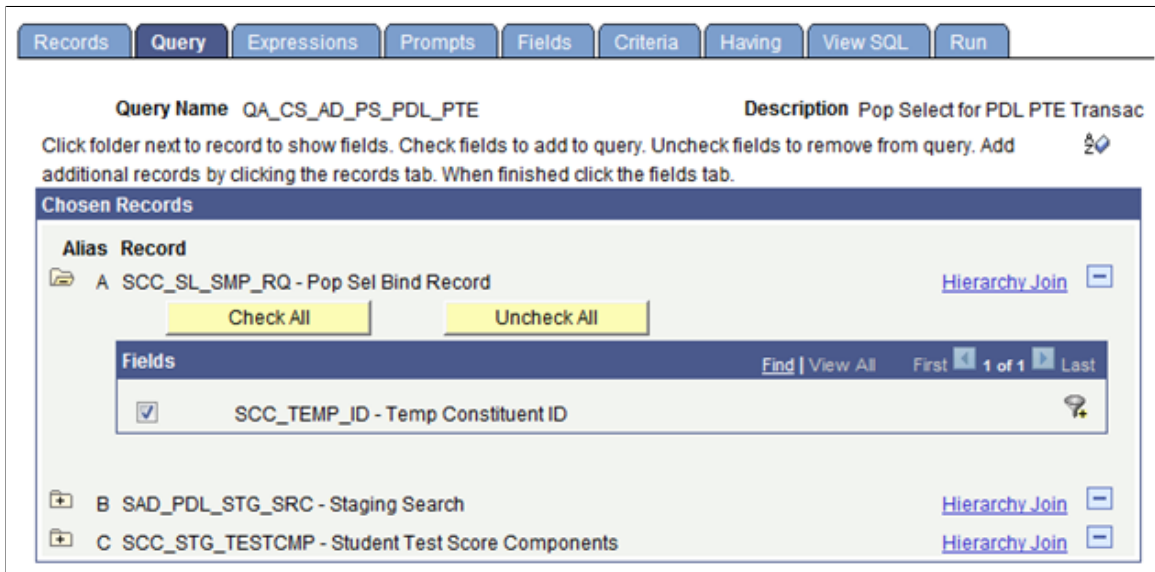
- Run the File Parser process to populate staging records based on incoming data file.

Set SAD\_PDL\_HDR\_STG.SCC\_TRANS\_STS = SB (Submitted).

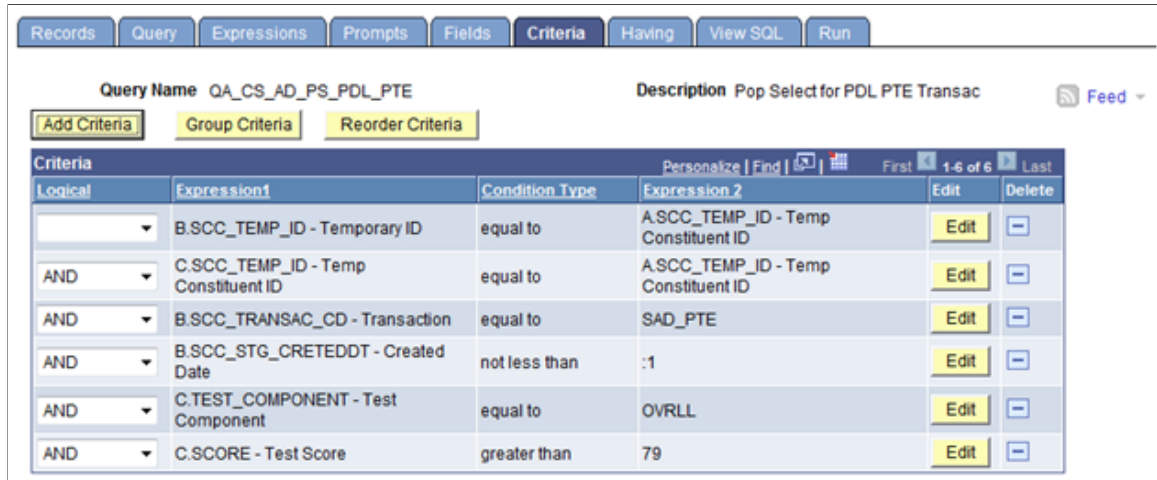
- Build a query in Query Manager to select your population based on your criteria defined.

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.



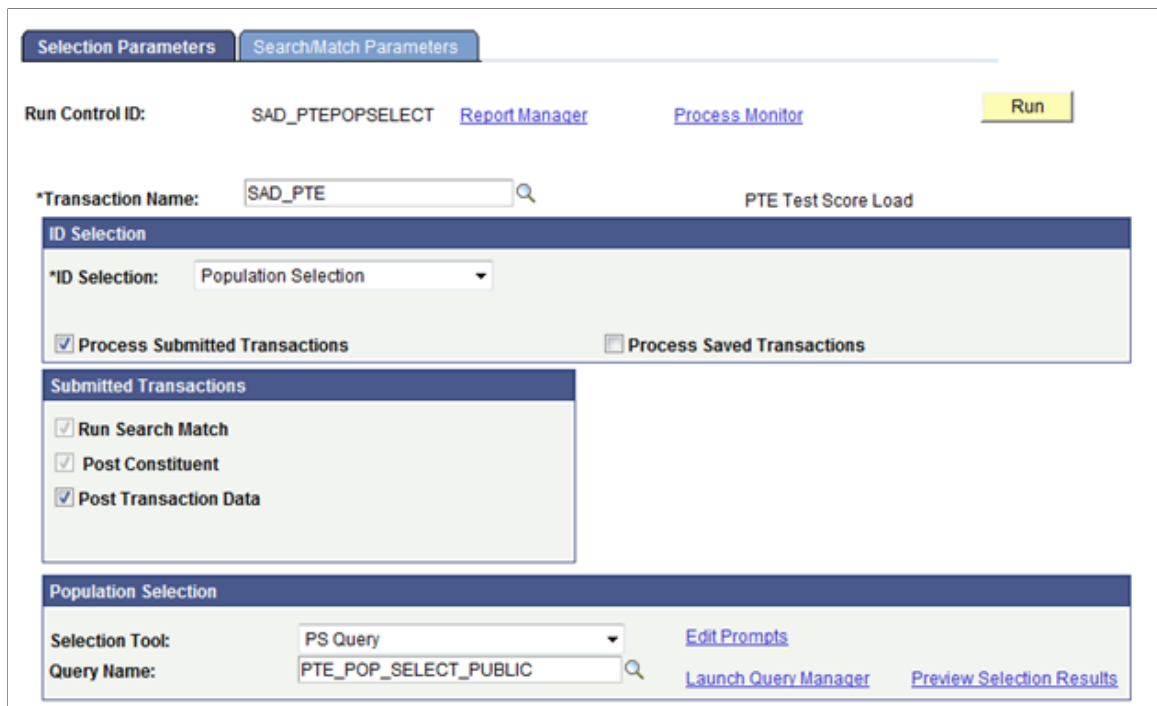
This example illustrates the fields and controls on the Criteria page of Query Manager.



- 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.



- 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.

## 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.

1. 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.

2. 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.

3. 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.

The screenshot displays the 'Selection Parameters' page with the following details:

- Run Control ID:** SADPTEPOPSELECT
- Transaction Name:** SAD\_PTE
- ID Selection:** All Person Temporary IDs
- Process Submitted Transactions:**
- Process Saved Transactions:**
- Saved Transactions:**
  - Run Search Match
  - Update Status to Submitted
  - Post Constituent
  - Post Transaction Data

- 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 using the same criteria as above.
- 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.

The screenshot displays the 'Selection Parameters' page. At the top, there are two tabs: 'Selection Parameters' (active) and 'Search/Match Parameters'. Below the tabs, the 'Run Control ID' is 'SADPTEPOPSELECT', with links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The '\*Transaction Name' is 'SAD\_PTE' and the 'PTE Test Score Load' is 'PTE Test Score Load'. The 'ID Selection' section shows '\*ID Selection' set to 'Population Selection'. There are two checkboxes: 'Process Submitted Transactions' (unchecked) and 'Process Saved Transactions' (checked). The 'Saved Transactions' section has four checked options: 'Run Search Match', 'Update Status to Submitted', 'Post Constituent', and 'Post Transaction Data'. The 'Population Selection' section shows 'Selection Tool' as 'PS Query' and 'Query Name' as 'PTE\_POP\_SELECT\_PUBLIC'. There are links for 'Edit Prompts', 'Launch Query Manager', and 'Preview Selection Results'.

**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:







```

    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;

```



```

*/
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\_PARENTSCOLLEGE for ParentSiblingCollege
- CFA\_PARENTSGRAD 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.CHKLST\_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 (Luzembourgish), 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 (Orlya), 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 (Talar), 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.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

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:*

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**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

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**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](#).

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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\_TESTCMP.LS\_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 Descr
- 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**

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**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.CHLST\_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.CHLST\_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.

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**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)

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**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.

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### 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.

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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.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 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<sup>®</sup> 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

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## Understanding External Test Score Loads Setup

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**Important!** Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. 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

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**Important!** Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. 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.

**Installation Student Administration**

Installation Student Admin
SA Features

**CRM Integration**

CRM for Higher Education

**Australia**

DEST, HECS, Centrelink, TAC
 Last CART Request ID

**Canada**

Government Reporting
  OUAC

**New Zealand**

NSI and SDR Personal Data, SDR Degree

**The Netherlands**

Use Dutch Functionality
 

Test Administration
 Last Test ID Assigned

Last Test List ID Assigned

Last Requirement ID Assigned

 Use Int Brin Code with Ext Org

**United Kingdom**

HESA, UCAS
  PBI
 

UCAS Encryption Profile ID

UCAS Decryption Profile ID

Apply Encryption Profile ID

Apply Decryption Profile ID

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. 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).

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Test Component Table</b>	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. 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Test Tables</b>	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:      \*Status:

\*Description:

Short Description:

Testing Agency:

Entitiy 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		<input type="button" value="+"/> <input type="button" value="-"/>
BCS	Biochemistry Subscore	Biochem Sb	20.00	99.00		<input type="button" value="+"/> <input type="button" value="-"/>
BY	Biology	Biology	200.00	990.00		<input type="button" value="+"/> <input type="button" value="-"/>
CBS	Cell Biology Subscore	Cell Bio S	20.00	99.00		<input type="button" value="+"/> <input type="button" value="-"/>

<b>Field or Control</b>	<b>Description</b>
<b>Testing Agency</b>	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, College Board, Educational Testing Services, and 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 <a href="#">Understanding the Entity Registry Impacts</a>
<b>Component</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Min Score/Max Score</b> (minimum score/maximum score)	Enter a test score range for each component.
<b>Subtest</b>	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. 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; AP Subject Test Codes</b>	<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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; AP Country Codes</b>	<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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; ADA Country Codes</b>	<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><b>Note:</b> 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; CRS Major Codes</b>	<p>Review the delivered CRS major codes or add or edit a code.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
AMCAS Credit Hours Codes	AMCAS_CR_HR_CODE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; AMCAS Setup &gt; AMCAS Credit Hour Codes</b>	<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><b>Note:</b> 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>
AMCAS GPA Codes	AMCAS_GPA_CODE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; AMCAS Setup &gt; AMCAS GPA Codes</b>	<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><b>Note:</b> 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>
AMCAS Ethnicity Map	SAD_AMC_ETHNIC_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; AMCAS Setup &gt; AMCAS Ethnicity Mapping</b>	<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><b>Note:</b> 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>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
AMCAS Country Mapping	SAD_AMC_CNT_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; AMCAS Setup &gt; AMCAS Country Mapping</b>	<p>Map the AMCAS country code values to the corresponding PeopleSoft country code values.</p> <hr/> <p><b>Note:</b> 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>
SAT Country Codes	SAD_SAT_CNTRY_TBL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; SAT Setup &gt; SAT Country Codes</b>	<p>Translates the SAT country values to internal PeopleSoft country values during the SAT specific load routine.</p>
SAT Math Recentered Values	SAT_MATH_RECENTER	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; SAT Setup &gt; SAT Math Recentered Values</b>	<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 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 <b>Math Score</b> field. The translated score appears in the <b>Recentered Math Score</b> field. This is the score that the reported score is translated to when it is processed.</p>



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
SAT Verbal Recentered Values	SAT_VERBAL_RECENTR	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; SAT Setup &gt; SAT Verbal Recentered Values</b>	<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. 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 <b>Verbal Score</b> field. The score that appears in the <b>Recentered Verbal Score</b> field is what the reported score is translated to when it is processed.</p>
SAT II Test Codes	SATII_CODE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; SAT Setup &gt; SAT II Test Codes</b>	Review the delivered SAT II test codes or add or edit a code. You can link your own codes and descriptions to the codes that you received in an SAT II tape or file so that your codes appear on your Admissions pages.
SAT II Test Recentered Values	SATII_TST_RECENTER	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; SAT Setup &gt; SAT II Test Recentered Values</b>	<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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Ethnicity Mapping</b>	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.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
GMAT State/Province Codes	SAD_GMT_STATE_TBL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; GMAT State/Province Codes</b>	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		
Ethnic Group	Description	AMCAS Race Code
1 ASIAN	Asian	AC

<i>Field or Control</i>	<i>Description</i>
<b>Ethnic Group</b>	Enter the internal ethnic group value that corresponds to the race code.
<b>AMCAS Race Code</b>	Enter the external AMCAS race code.
<b>Copy Ethnicity Map to New Application Year</b>	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

	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	+	-






























































<i>Field or Control</i>	<i>Description</i>
<b>Copy Country Map to New Application Year</b>	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	<input type="text"/> 		 
2	003	ALBANIA	ALB 	Albania	<input type="text"/> 		 
3	005	ALGERIA	DZA 	Algeria	<input type="text"/> 		 
4	008	ANDORRA	AND 	Andorra	<input type="text"/> 		 
5	010	ANGOLA	AGO 	Angola	<input type="text"/> 		 
6	011	ANGUILLA	AIA 	Anguilla	<input type="text"/> 		 
7	012	ANTIGUA AND BARBUDA	ATG 	Antigua and Barbuda	<input type="text"/> 		 
8	015	ARGENTINA	ARG 	Argentina	<input type="text"/> 		 
9	016	ARMENIA	ARM 	Armenia	<input type="text"/> 		 
10	017	ARUBA	ABW 	Aruba	<input type="text"/> 		 
11	020	AUSTRALIA	AUS 	Australia	<input type="text"/> 		 
12	025	AUSTRIA	AUT 	Austria	<input type="text"/> 		 
13	029	AZERBAIJAN	AZE 	Azerbaijan	<input type="text"/> 		 
14	035	BAHAMAS, THE	BHS 	Bahamas	<input type="text"/> 		 
15	040	BAHRAIN	BHR 	Bahrain	<input type="text"/> 		 



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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Test Score Mapping	SAD_TEST_SETUP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; External Test Score Mapping</b>	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	Record Description		
ACT <input type="text"/>	ACT Assessment	<input checked="" type="checkbox"/>	<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_ACT_SUS <input type="text"/>	ACT Suspense File	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_ACT_SUS_COL <input type="text"/>	ACT Suspense College Extracur	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_ACT_SUS_HS <input type="text"/>	ACT Suspense HS Activities	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_ACT_SUS_STD <input type="text"/>	ACT Suspense Years of Study	<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_ACT_CD <input type="text"/>	ACT Student Profile Section	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_ACT_CD_COL <input type="text"/>	ACT SPS College Activities	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_ACT_CD_HS <input type="text"/>	ACT SPS High School Activities	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SAD_ACT_CD_STD <input type="text"/>	ACT SPS Years Studied	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

<b>Field or Control</b>	<b>Description</b>
<b>Test ID</b>	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.
<b>Available for CRM Post</b>	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.

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**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.

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## Mapping External Test Codes to Internal Codes

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**Important!** Test score load and other processes and components discussed in the *Processing External Test Scores* documentation are deprecated. 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.

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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:

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

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

- Religious preference

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

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

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

## Pages Used to Map External Test Codes to Internal Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Interests Map	SAD_ACAD_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Create Prospects Setup &gt; Academic Interests Map</b>	<p>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.</p> <p>The following test layouts provide a major interest: ACT, EOS, GMASS, SAT, GRE, and SSS.</p>
Extracurricular Activity Map	SAD_EXTRA_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Create Prospects Setup &gt; Extracurricular Activity Map</b>	<p>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.</p>

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Religious Preference Map	SAD_REL_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Create Prospects Setup &gt; Religious Preference Map</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Create Prospects Setup &gt; Admit Term Map</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Create Prospects Setup &gt; Program Plan SubPlan Map</b>	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.

<b>Academic Interests Map</b>					
<b>Test ID</b>	ACT	ACT Assessment			
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>					
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		

<i>Field or Control</i>	<i>Description</i>
<b>Academic Interest</b>	Enter the internal academic interest code that corresponds to the testing agency code. Academic interest codes are defined on the External Subject Table page.
<b>Interest Code</b>	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.

<b>Extracurricular Activity Map</b>						
<b>SetID</b> PSUNV Peoplesoft University						
<b>Test ID</b> 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"/>	+ -

<b>Field or Control</b>	<b>Description</b>
<b>Extracurricular Activity</b>	Enter the internal extracurricular activity code that corresponds to the testing agency code. Extracurricular activity codes are defined on Extracurricular Activity Table page.
<b>Activity Code</b>	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.
<b>College Activity</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>High School/Community Activity</b>	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	JWSH		Jewish	24	+	-

<i>Field or Control</i>	<i>Description</i>
<b>Religious Preference</b>	Enter the religious preference code that corresponds to the testing agency code. Religious preference codes are defined on the Religious Preference Table page.
<b>Religion Code</b>	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	+	-

<b>Field or Control</b>	<b>Description</b>
<b>Graduation Date From and Graduation Date To</b>	Enter graduation date ranges for the test layouts that provide a graduation date.
<b>Term</b>	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	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
450	FAU	MUSIC	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
561	FAU	MUSIC	PIANO	<input type="button" value="+"/>	<input type="button" value="-"/>
723	FAU	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
834	FAU	ART	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
836	LAU	BIOLBS	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Field or Control	Description
<b>Interest Code</b>	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.
<b>Academic Program, Academic Plan, Academic Sub-Plan</b>	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:

<b>OUAC ELEMENT</b>	<b>EC Map ID</b>	<b>Business Doc Record</b>	<b>Name</b>
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

<b>OUAC ELEMENT</b>	<b>EC Map ID</b>	<b>Business Doc Record</b>	<b>Name</b>
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

<b>OUAC ELEMENT</b>	<b>EC Map ID</b>	<b>Business Doc Record</b>	<b>Name</b>
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

<b>OUAC ELEMENT</b>	<b>EC Map ID</b>	<b>Business Doc Record</b>	<b>Name</b>
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:

<b>OUAC ELEMENT</b>	<b>Transactions</b>	<b>TP Convert Name</b>
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

<b>OUAC ELEMENT</b>	<b>Transactions</b>	<b>TP Convert Name</b>
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:

<b>OUAC ELEMENT</b>	<b>Transactions</b>	<b>Field Name</b>
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)

<b>OUAC ELEMENT</b>	<b>Transactions</b>	<b>Field Name</b>
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:

<b>OUAC ELEMENT</b>	<b>Table Name</b>
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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; OUAC &gt; Law Categories</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; OUAC &gt; Teaching Subjects</b>	Define OUAC teaching subjects. Teaching subjects are used on the OUAC A8/U8 page.
CEGEP Program Table	CEGEP_PROG_TBL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; OUAC &gt; CEGEP Program Table</b>	Define programs for CEGEP.

## Setting Up OUAC Organizations

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

This section discusses how to:

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

## Pages Used to Set Up OUAC Organizations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Organization Table	EXT_ORG_TABLE	<b>Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; Organization Table &gt; Organization Table</b>	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	<b>Campus Community &gt; Organization Data &gt; Create/Maintain Organizations &gt; Organization Table &gt; Regional</b>	In the <b>OUAC Organization Data</b> Create 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	<b>Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; Organization School Data</b>	Enter data that applies to an organization that offers courses.
Organization Affiliation	EXT_ORG_AFFLTN	<b>Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; Organization Affiliation</b>	Identify details that are important to your institution in affiliation with an organization.
School Course Classification	SCHOOL_COURSES	<b>Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; School Course Classification</b>	Record the specific course offerings for each subject area.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Comment Category Table	CMNT_CATG_TABLE	<ul style="list-style-type: none"> <li>• <b>Campus Community &gt; Comments &gt; Set Up Comments &gt; Comment Category Table</b></li> <li>• <b>Set Up SACR &gt; Common Definitions &gt; Comments &gt; Comment Category Table</b></li> </ul>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Mident Code</b>	Enter the Ontario Ministry of Education six-digit school code.
<b>OUAC Institution Code</b>	Enter the code that identifies OUAC institutions. When you post OUAC data, the process looks for this code to populate the <b>EXT_ORG_ID</b> field.
<b>Grade 9 (through 12) Enrollment</b>	Enter the current enrollment levels for the respective grades.
<b>OAC Enrollment</b>	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

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## 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.

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Rating Comp Definition Table</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Rating Tables &gt; Rating Scheme Table</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Rating Tables &gt; Rating Components Table</b>	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.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Evaluation Table	EVALUATION_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Evaluation Tables &gt; Evaluation Table</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Evaluation Tables &gt; Evaluation Committee Table</b>	Assign evaluation committees to your evaluation codes (if applicable).
Evaluation Status Table	EVAL_STATUS_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Evaluation Status Table</b>	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.

The screenshot shows a web interface with two tabs: "Rating Scheme Table" (selected) and "Rating Components Table". Below the tabs, the following information is displayed:

- Academic Institution:** PSUNV PeopleSoft University
- Rating Scheme:** UGAPPLFYR

The main form area contains the following fields and controls:

- \*Effective Date:** 01/01/1900 (with a calendar icon)
- \*Status:** Active (dropdown menu)
- Extracts:** A yellow button with a plus and minus icon.
- \*Rating Type:** Overall (dropdown menu)
- \*Description:** UG Applications (text input field)
- Short Description:** UG Appl (text input field)
- 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. (text area with scrollbar)

<i>Field or Control</i>	<i>Description</i>
<b>Rating Type</b>	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, Audition, Committee, Interview, Overall,</i> and <i>Portfolio</i> .  <b>Note:</b> If you plan to evaluate applicants using automated processes, you must define a rating scheme with an <i>Overall</i> rating type.
<b>Instructions</b>	Enter information about this rating scheme.
<b>Extracts</b>	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="UGSUBJCT"/>
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](#).

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**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.

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## 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.

<b>Field or Control</b>	<b>Description</b>
<b>Rating Component</b>	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.
<b>Type</b>	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> .
<b>Processing Order</b>	Enter the order in which this component should be processed within the group of components assigned to this rating scheme.

<b>Field or Control</b>	<b>Description</b>
<b>Final Value</b>	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.
<b>Required</b>	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 or SAT score, but not both, since only the testing component is required.
<b>Method</b>	<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>
<b>Formula ID</b>	If you selected <i>Automatic</i> in the <b>Method</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>Rating Value</b>	<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><b>Note:</b> 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:**

**Short Description:**

**\*Evaluation Type:**

**Committee Rating ID:**        UG Application Committee

**Overall Rating ID:**        UG Applications

**Comments:**

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Type</b>	<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>

<b>Field or Control</b>	<b>Description</b>
<b>Committee Rating ID</b>	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.
<b>Overall Rating ID</b>	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 displays the 'Evaluation Committee Table' interface. At the top, there are tabs for 'Evaluation Table' and 'Evaluation Committee Table'. Below the tabs, the 'Academic Institution' is set to 'PSUNV' (PeopleSoft University) and the 'Evaluation Code' is 'UGAPPLFYR' (UG Applicants). A search bar for '\*Committee:' shows 'UGEV01' selected, corresponding to 'UG Admissions Committee'. Below this is a 'Comments:' text area. A table for '\*Evaluator ID' and '\*Role' is visible, listing two evaluators: AD1040 (Sullivan, Irving) and AD1041 (Dern, Bill), both assigned the role 'STAF' (Adm Staff). Navigation controls like 'Find | View All' and 'First 1 of 1 Last' are present above the table.

<b>Field or Control</b>	<b>Description</b>
<b>Committee</b>	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.
<b>Evaluator ID</b>	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.
<b>Role</b>	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>
<b>Evaluation in Progress</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; Response Reason Table</b>	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

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; Admissions Action Table</b>	View admissions program actions.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Program Action Table	PROG_ACTION_TABLE	<b>Set Up SACR &gt; Product Related &gt; Student Records &gt; Program Action &gt; Program Action Table</b>	<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><b>Note:</b> 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"> <li>• <b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; Program Action Reason Table</b></li> <li>• <b>Set Up SACR &gt; Product Related &gt; Student Records &gt; Program Action &gt; Program Action Reason Table</b></li> </ul>	<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

Find | View All | First 1 of 1 Last

\*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.

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**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.

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## Chapter 15

# Recruiting Prospective Students

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## 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.

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## 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	<b>Student Recruiting</b> > <b>Maintain Prospects</b> > <b>Create/Update Prospects</b> > <b>Prospect Career Data</b>	Enter prospect career data. Store additional prospect information that you define by using the Common Attribute Framework.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Prospect Program Data	ADM_PRSPCT_PROG	<b>Student Recruiting</b> > <b>Maintain Prospects</b> > <b>Create/Update Prospects</b> > <b>Prospect Program Data</b>	Enter information about programs, plans, or subplans in which a prospect has expressed interest.
Prospect School/Recruiting	ADM_PRSPCT_RECRUIT	<b>Student Recruiting</b> > <b>Maintain Prospects</b> > <b>Create/Update Prospects</b> > <b>Prospect School/Recruiting</b>	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 <b>Meetings</b> 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.

Effective Date	*Field	Text - 20	LOV	Description
05/30/2013	CFA_TEXTOK	No		
05/30/2013	CFA_PARENTSGRAD	Y		
05/30/2013	CFA_CLASSRANK	Top10		
05/30/2013	CFA_PARENTSCOLLEGE			
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.

<i>Field or Control</i>	<i>Description</i>
<b>Admit Term</b>	Enter the admit term for the prospect's career. Define admit terms on the Term Table page. (user defaults)

<b>Field or Control</b>	<b>Description</b>
<b>Admit Type</b>	Enter the prospect's admit type for this career. Define admit types on the Admit Type Table page. (user defaults)
<b>Campus</b>	Enter a campus to associate the prospect to a specific campus. Define campuses on the Campus Table page. (user defaults)
<b>Academic Load</b>	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.
<b>Academic Level</b>	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)
<b>Housing</b>	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)
<b>Financial Aid Interest</b>	Select to indicate that this prospect has an interest in financial assistance. This field is for informational purposes only. (user defaults)
<b>Applied</b>	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.
<b>Recruiting Status</b>	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> .
<b>Status Date</b>	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.
<b>Created On</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Referral Source</b>	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, Campus Event, or 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.
<b>Source Date</b>	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.
<b>Recruiting Center</b>	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)
<b>Go</b>	Click this button to go to another component for this prospect record.

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**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.

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### **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.

<b>Field or Control</b>	<b>Description</b>
<b>Recruiting Status</b>	<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>
<b>Status Date</b>	The status date is the system date on the day that you last modified the <b>Recruiting Status</b> field.
<b>Application Number</b>	If the prospect applies to this academic program, the system automatically updates the application number.

<b>Field or Control</b>	<b>Description</b>
<b>Recruiting Center</b>	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)
<b>Academic Plan and Sub-Plan</b>	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.

The screenshot displays the 'Prospect School/Recruiting' page for prospect Ronald Greene (AA0037). The page is organized into several sections:

- Header:** Prospect name (Ronald Greene) and ID (AA0037). Academic Career: Undergraduate. Institution: PSUNV.
- 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: (Searchable field)
  - From: (Field)
  - Primary Recruiter ID: (Field)
  - Assign Region From: Home Postal Code, School Postal Code
- Recruiting Categories:**
  - \*Category: (Searchable field)
  - Sub-Category: (Dropdown)
  - Description: (Text area)
  - Group: (+, - buttons)
  - Move to Application: (Checkbox)
- Recruiters:**
  - Recruiters Prompt: Recruiters
  - \*Recruiter ID: (Field)
  - Recruiter Type: (Field)
  - Primary: (Field)
  - Buttons: (+, -)
- Transfer To:** Education (Dropdown) with a Go button.

<i>Field or Control</i>	<i>Description</i>
<b>Events</b>	Click this link to record the events that this prospect attended to which this prospect was invited. The Attendee Events Page appears.

## School Information

<i>Field or Control</i>	<i>Description</i>
<b>Last School Attended</b>	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).
<b>Graduation Date</b>	Enter the graduation date from the last school that the person attended. (user defaults).

## Recruiting Information

<i>Field or Control</i>	<i>Description</i>
<b>Region</b>	You can assign a recruiting region manually or automatically. To manually assign a region, click the prompt on the <b>Region</b> field and enter as value. Define regions on the Region Table page.
<b>Home Postal Code</b>	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.
<b>School Postal Code</b>	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 <a href="#">Setting Up Your Recruiting Structure</a> .

<b>Field or Control</b>	<b>Description</b>
<b>From</b>	<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 <b>Home Postal Code</b> button.</p> <p><i>School</i> appears if you assigned the region when you click the <b>School Postal Code</b> button.</p> <p>See <a href="#">Defining Recruiters</a>.</p>

### Recruiting Categories

<b>Field or Control</b>	<b>Description</b>
<b>Category</b>	<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><b>Note:</b> If you plan to assign a regional recruiter to this prospect, you must enter a category of <i>REGN</i> (region).</p> <hr/>
<b>Sub-Category</b>	<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>
<b>Group</b>	<p>The system automatically populates this field from the Recruiting Category Table page after you enter a recruiting category in the <b>Category</b> field.</p>
<b>Move to Application</b>	<p>Select this check box to copy the information in the <b>Recruiting Categories</b> 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 <b>Copy Data</b> and <b>Recruiting Categories</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>Recruiters Prompt</b>	<p>Select this check box if you want <i>all</i> recruiters to be available when you prompt on the <b>Recruiter ID</b> 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 <b>Recruiter ID</b> 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 <b>Recruiters Prompt</b> field displays the recruiters for the school's region. If you click the prompt on the <b>Recruiter ID</b> 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 <b>Recruiters Prompt</b> field displays the recruiters for the address region. If you click the prompt on the <b>Recruiter ID</b> 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 <b>Recruiter ID</b> field. Click the prompt on the <b>Recruiters</b> field to view the recruiters for the category.</p> <p>To override the system defaults, select the <b>Recruiters Prompt</b> check box. All recruiters for the academic career are available when you click the prompt on the <b>Recruiter ID</b> field.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Recruiter ID</b>	Enter the ID of the person to assign to this prospect. You can assign multiple recruiters for any recruiting category to a prospect.
<b>Recruiter Type</b>	The recruiter type appears automatically, based on the recruiter ID.
<b>Primary</b>	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 <b>Primary Recruiter ID</b> field. You can also enter both primary and non-primary recruiters using this option.
<b>Go</b>	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).

<b>Field or Control</b>	<b>Description</b>
<b>Event ID</b>	Enter the ID for the event that the prospect is attending (or attended).
<b>Description, Event Type, and Attendee</b>	The system displays the description, event type, and attendee when you select the event ID.
<b>Meeting</b>	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).

<b>Field or Control</b>	<b>Description</b>
<b>Event Mtg</b> (event meeting), <b>Description</b> , <b>Meeting Date</b> , <b>Meeting Start Time</b> , and <b>Meeting End Time</b>	Enter the event meeting number. The system then displays the event description, meeting date, meeting start time, and meeting end time.
<b>Status</b>	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.

<b>If the Communication, Checklist or Comments Pages are Accessed From the:</b>	<b>The Variable Data for the Following Administrative Function is Supplied:</b>	<b>Data that is Transferred</b>
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)

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## 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](#)

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## 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.

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**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.

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To assist you in creating your queries, PeopleSoft delivers the following queries as examples in the demo database: PS\_AD\_ACT\_CPTTEST02, PS\_AD\_ACT\_CPTTEST03, PS\_AD\_ACT\_CPTTEST04, PS\_AD\_AP\_CPTTEST01, PS\_AD\_AP\_CPTTEST02, PS\_AD\_GMAT\_CPTTEST01, PS\_AD\_GRE\_CPTTEST01, PS\_AD\_LSAT\_CPTTEST01, PS\_AD\_SAT\_CPTTEST01, PS\_AD\_SAT\_CPTTEST02, PS\_AD\_SAT\_CPTTEST03, PS\_AD\_SAT\_CPTTEST04

## 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"> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Create Prospects From Tests</b></li> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Create Prospects From Tests</b></li> </ul>	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 <b>Select Query</b> 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](#) Run

\*Test ID:  Graduate Record Exam

Default Prospect Values

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

Prospect Select Query

<b>Query Name:</b>	<input type="text" value="None"/>	<span style="border: 1px solid black; padding: 2px 10px;">Select Query</span>
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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

<i>Field or Control</i>	<i>Description</i>
<b>Test ID</b>	<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 <b>Select Query</b> 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 <b>Search</b> 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.

<i>Field or Control</i>	<i>Description</i>
<b>Academic Program</b>	Because the Academic Program table is keyed by admit term, you must enter an admit term in order to enter an academic program.
<b>Assign 3C</b>	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>
<b>Event ID</b>	<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>
<b>Select Query</b>	Click the link to access the Select Query page. You must select a query before you click the <b>Run</b> 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.

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**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.

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## 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.

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**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.

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### 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	<b>Student Recruiting &gt; Maintain Prospects &gt; Create Prospects from Query</b>	Create prospects from any record in your database through a system-wide query.
Select Query	SAD_QRY_SELECT	Click the <b>Select Query</b> 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](#) Run

### Default Prospect Values

<b>*Academic Institution:</b>	<input type="text" value="PSUNV"/>	PeopleSoft University
<b>*Academic Career:</b>	<input type="text" value="MEDS"/>	Medical School
<b>Campus:</b>	<input type="text" value="MAIN"/>	Main Hacienda Campus
<b>*Recruiting Status:</b>	<input type="text" value="Inquiry"/>	
<b>*Recruiting Center:</b>	<input type="text" value="MEDS"/>	Medical School
<b>Referral Source:</b>	<input type="text" value="MEDA"/>	Medical School Advisor
<b>Admit Type:</b>	<input type="text" value="MED"/>	Medical First Year
<b>Admit Term:</b>	<input type="text" value="0530"/>	2004 Fall
<b>Academic Level:</b>	<input type="text" value="Graduate"/>	
<b>Academic Program:</b>	<input type="text" value="MED"/>	Medicine
<b>Academic Plan:</b>	<input type="text" value="MEDICINE"/>	Medicine
<b>Academic Sub-Plan:</b>	<input type="text" value=""/>	
<input checked="" type="checkbox"/> <b>Assign 3C</b>		
<b>Event ID:</b>	<input type="text" value="NEWPROP"/>	New Prospect - PROP

### Prospect Select Query

**Query Name:** Select Query

**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	<b>Student Recruiting</b> > <b>Prospect Summaries</b> > <b>Prospect Summary</b>	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	<b>Student Recruiting</b> > <b>Prospect Summaries</b> > <b>Prospect Recruiters Summary</b>	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	<b>Student Recruiting</b> > <b>Assign Recruiters</b> > <b>Recruiter Assignment</b> > <b>General Selection Crit</b>	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	<b>Student Recruiting</b> > <b>Assign Recruiters</b> > <b>Recruiter Assignment</b> > <b>Academic Selection Crit</b>	Enter any academic selection criteria for the prospect group.
Prog/Plan Selection Crit (program or plan selection criteria)	ADM_PROGRAM_PARMS	<b>Student Recruiting</b> > <b>Assign Recruiters</b> > <b>Recruiter Assignment</b> > <b>Prog/Plan Selection Crit</b>	Enter any academic program or academic plan selection criteria for the prospect group.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Acad Interests Selection Crit (academic interests selection criteria)	ADM_INTEREST_PARMS	<b>Student Recruiting &gt; Assign Recruiters &gt; Recruiter Assignment &gt; Acad Interests Selection Crit</b>	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_RECRRREGN_PARMS	<b>Student Recruiting &gt; Assign Recruiters &gt; Recruiter Assignment &gt; Assignment Crit</b>	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.

The screenshot shows the 'General Selection Crit' page with the following sections:

- Run Control ID:** 1. Buttons for [Report Manager](#), [Process Monitor](#), and a **Run** button.
- Academic Selection:**
  - \*Institution: GLAKE (Glake)
  - Academic Career: UGRD (Undergrad)
  - Last School Attended: 000000001 (Cottonwood High School)
- Bio/Demo Selection:**
  - Gender: Male
  - Citizenship Country: USA
  - Citizenship Status: Native
  - Marital Status: Single
- Address Selection:**
  - Country: USA
  - State: CA
  - Postal Code:
    - Begins With From: [ ]
    - Equals To: [ ]
    - Range To: [ ]
    - N/A
- Region Selection:**
  - N/A
  - Blank
  - Non-Blank
- Ethnic Group Selection:**
  - Regulatory Region: USA
  - Ethnic Groups table:

*Ethnic Group	Description
1	[ ]

**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

<i>Field or Control</i>	<i>Description</i>
<b>Institution and Academic Career</b>	<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>

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Last School Attended</b>	Enter the last school attended to assign regions, recruiting categories, and recruiters based on this criterion.

### **Bio/Demo Selection**

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Gender</b>	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.
<b>Citizenship Country</b>	Enter a county of citizenship.
<b>Citizenship Status</b>	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.
<b>Marital Status</b>	Select a marital status to assign regions, recruiting categories, and recruiters based on this criterion.

### **Address Selection**

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Country and State</b>	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.



<b>Field or Control</b>	<b>Description</b>
<b>Begins With and From</b>	Select a prospect group by defining a beginning postal code. Enter the beginning postal code in the <b>From</b> 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.
<b>Equals</b>	Select this option to choose a prospect group by a specific postal code. Enter the postal code in the <b>From</b> field.
<b>Range, From, and To</b>	Select <i>Range</i> to select a prospect group by a postal code range. Enter the beginning postal code in the <b>From</b> field and the ending postal code in the <b>To</b> field.
<b>N/A</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>N/A</b>	Select this option if you do not want to use region in your selection criteria for this prospect group.
<b>Blank</b>	Select this option to select people for a prospect group who do not have a region assigned.
<b>Non-Blank</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Regulatory Region</b>	Select the region for which the ethnic groups are defined. Once this field is populated, the <b>Ethnic Group</b> field will appear.
<b>Ethnic Group</b>	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.

The screenshot shows the 'Academic Selection Crit' page with the following fields and controls:

- Run Control ID:** 1
- Buttons:** Report Manager, Process Monitor, Run
- Admit Term:** 0505 (dropdown), 2003 Fall
- Admit Type:** FYR (dropdown), First Year
- Campus:** MAIN (dropdown), Main Campus
- Acad Load:** Full-Time (dropdown)
- Acad Level:** 1st Year (dropdown)
- Recruiting Information:**
  - Recruiting Status:** Applicant (dropdown)
  - Referral Source:** APPL (dropdown), Applicatn
  - Created On:** (calendar icon)
  - Recruiting Center:** UCTR (dropdown), Recruiting
- Housing:** On Campus (dropdown)
- Selection Criteria For Fin Aid:**
  - Interested in Fin Aid
  - Not Interested in Fin Aid
  - Not Applicable

<b>Field or Control</b>	<b>Description</b>
<b>Admit Term</b>	Enter the admit term for this career and prospect group to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career n the General Selection Crit page.
<b>Admit Type</b>	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.
<b>Campus</b>	Enter a campus to assign regions, recruiting categories, and recruiters based on this criterion.

<b>Field or Control</b>	<b>Description</b>
<b>Acad Load</b> (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.
<b>Acad Level</b> (academic level)	Select an academic level for this career to assign regions, recruiting categories, and recruiters based on this criterion.  <b>Note:</b> 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.
<b>Recruiting Status</b>	Select the recruiting status to assign regions, recruiting categories, and recruiters based on this criterion.
<b>Created On</b>	Enter the date that prospect records were created to assign regions, recruiting categories, and recruiters based on this criterion.
<b>Referral Source</b>	Enter the referral source to assign regions, recruiting categories, and recruiters based on this criterion.
<b>Recruiting Center</b>	Enter the recruiting center to which prospects in this career are assigned to assign regions, recruiting categories, and recruiters based on this criterion.
<b>Housing</b>	Select a housing interest for this prospect group to assign regions, recruiting categories, and recruiters based on this criterion.
<b>Interested in Fin Aid</b> (interested in financial aid)	Select this option to select a prospect group by those who indicate an interest in financial aid.
<b>Not Interested in Fin Aid</b> (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.
<b>Not Applicable</b>	Select this option to selects a prospect group regardless of their expressed interest in financial aid. This is the default setting.

## Using Program and Plan Criteria to Select the Prospect Group

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

<b>Field or Control</b>	<b>Description</b>
<b>Academic Program</b>	<p>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.</p>
<b>Campus</b>	<p>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.</p>
<b>Recruiting Status</b>	<p>Select a recruiting status for this academic program if you want to assign regions, recruiting categories, and recruiters based on this criterion.</p>
<b>Recruiting Center</b>	<p>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.</p>
<b>Academic Plan</b>	<p>Enter an academic plan for the academic program in the <b>Academic Program</b> 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.</p>

## 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.

<b>Field or Control</b>	<b>Description</b>
<b>Priority</b>	Select this option to select prospects who have expressed a prioritized interest in certain subject areas.
<b>Non-Priority</b>	Select this option to select prospects who have not expressed a prioritized interest in certain subject areas.
<b>Not-Applicable</b>	Select this option to select prospects regardless of their expressed interest in any subject area. This is the default option.
<b>Subject Area</b>	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 <b>Bio/Demo Selection</b> group box on the first page in this component.
<b>From and To</b>	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 <b>Priority</b> 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.

### Assignment Selection

<i>Field or Control</i>	<i>Description</i>
<b>Regions and Categories/Recruiters</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>School</b>	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.
<b>Address</b>	Select this option to automatically assign a region for this prospect group, based on the home address postal code of the prospect.
<b>Region Tree</b>	Manually assign a region for this prospect group when you click the prompt on the <b>Region</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>Category</b>	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.
<b>Sub-Cat</b> (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.
<b>Existing Recrs</b> (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.

<b>Field or Control</b>	<b>Description</b>
<b>Move to Application</b>	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 <b>Recruiting Categories</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>All</b>	Select this option to assign to this prospect group all of the region's recruiters in the region that you define.
<b>One</b>	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.
<b>None</b>	Select this option to assign no recruiters if there are multiple recruiters for this category.

### Recruiters

<b>Field or Control</b>	<b>Description</b>
<b>Prompt Category</b>	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 <b>Recruiting Categories</b> group box. Select <i>Recruiters</i> to display a list of all recruiters, regardless of their category.  If you chose the <i>REGN</i> category, the <b>Recruiting Categories</b> and <b>Recruiters</b> group boxes become unavailable.
<b>Recruiter ID</b>	Enter a recruiter ID for the prospect group. The list of recruiters that appears depends on what you entered in the <b>Prompt Category</b> field.



<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Primary</b>	Select this check box if you want to designate the recruiter as the primary recruiter.

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

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



## Chapter 16

# Tracking Supporting Prospect and Applicant Information

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## 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.

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**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.

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## 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](#)

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## 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"> <li>• <b>Student Recruiting &gt; Maintain Prospects &gt; Academic Information &gt; Academic Interests</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; Academic Information &gt; Academic Interests</b></li> </ul>	<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>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Test Results	STDNT_TEST_SCORE	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; Maintain Prospects &gt; Academic Information &gt; Test Results</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; Academic Information &gt; Test Results</b></li> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Results or Student Admissions &gt; External Test Score Processing &gt; Test Results</b></li> <li>• <b>Records and Enrollment &gt; Transfer Credit Evaluation &gt; Test Results</b></li> </ul>	<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"> <li>• <b>Student Recruiting &gt; Prospect Summaries &gt; Academic Test Summary</b></li> <li>• <b>Student Admissions &gt; Applicant Summaries &gt; Academic Test Summary</b></li> <li>• <b>Records and Enrollment &gt; Transfer Credit Evaluation &gt; Academic Test Summary</b></li> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Academic Test Summary or Student Admissions &gt; External Test Score Processing &gt; Academic Test Summary</b></li> </ul>	<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:    **Use Priority**

Subject Area	*Description	*Data Source	Priority		
BIOL <input type="button" value="🔍"/>	Biology	Self-Rptd <input type="button" value="▼"/>	1	<input type="button" value="+"/>	<input type="button" value="-"/>

<i>Field or Control</i>	<i>Description</i>
<b>Effective Date</b>	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.
<b>Use Priority</b>	Select this check box to prioritize a person's academic interests.  The default for this field is selected if you enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.
<b>Subject Area</b>	Enter a subject area. Define external subject areas on the External Subject Table page.
<b>Description</b>	The description for this subject appears.  If the person expressed an interest for which no subject area code is defined, leave the <b>Subject Area</b> field blank and enter a free-form.
<b>Data Source</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Priority</b>	Enter a priority level (for example <i>1, 2, 3</i> ). <i>1</i> is the highest priority.  The default for this field is selected if you have enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.
<b>Go</b>	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

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**Important!** Mass Change is a deprecated product. 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
<b>Test ID</b>	Enter the test you are recording. Define tests on the Test Tables page.
<b>Checklist Item Update</b>	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.
<b>Test Date</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Data Source</b>	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.
<b>Acad Level</b> (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.
<b>Component</b>	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.
<b>Score %tile</b> (score percentile)	Enter the score, percentile, or both for this test component.
<b>Test Date</b>	The system automatically populates this field from the value you entered in the <b>Defaults for Components</b> group box. You can edit the date if necessary.
<b>Data Source</b>	The system automatically populates this field from the value you entered in the <b>Defaults for Components</b> group box. You can edit the value if necessary.
<b>Acad Level</b>	The system automatically populates this field from the value you entered in the <b>Defaults for Components</b> group box. You can edit the value if necessary.
<b>Letter Score</b>	Enter a letter score for this test component, if applicable.
<b>Date Loaded</b>	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.
<b>Index</b>	The LSAT 3-Year Test Index appears if this information has been loaded.
<b>Stnd Admin</b> (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.

<b>Field or Control</b>	<b>Description</b>
<b>Go</b>	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		Sort By	
Test ID: <input type="text" value="GRE"/>	Test Component: <input type="text"/>	<input checked="" type="radio"/> Date <input type="radio"/> Score <input type="radio"/> Test <input type="button" value="Search"/>	

Test ID	Description	Score	%ile	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

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

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## 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)

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## 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 “Pages Used to View Application History” (Financial Aid).



## Chapter 17

# Tracking External Education

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## 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.

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**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.

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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.

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## 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>
<b>Transfer To</b>	<i>Course Credits</i> appears by default. Enter a value and click <b>Go</b> to transfer to another component.

<b>Field or Control</b>	<b>Description</b>
<b>Customize</b>	<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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
External Education	SAD_EXT_EDUCATION	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Application/ Transcript Loads &gt; Education &gt; External Education</b></li> <li>• <b>Student Recruiting &gt; Maintain Prospects &gt; Academic Information &gt; Education &gt; External Education</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; Academic Information &gt; Education &gt; External Education</b></li> <li>• <b>Records and Enrollment &gt; Transfer Credit Evaluation &gt; External Education &gt; External Education</b></li> </ul>	Enter information about external careers, transcripts, and subjects. View school details.
External Education Comment	SAD_EXT_ED_COMM	Click the <b>Comments</b> link on the External Education page.	Enter transcript comments.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Courses and Degrees	SAD_EXT_EDUCATION2	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Application/ Transcript Loads &gt; Education &gt; Courses and Degrees</b></li> <li>• <b>Student Recruiting &gt; Maintain Prospects &gt; Academic Information &gt; Education &gt; Courses and Degrees</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; Academic Information &gt; Education &gt; Courses and Degrees</b></li> <li>• <b>Records and Enrollment &gt; Transfer Credit Evaluation &gt; External Education &gt; Courses and Degrees</b></li> </ul>	Enter external course defaults and information about external courses and degrees.
Grade Input History	SAD_EXT_CRG_GRD	Click the <b>History</b> link on the Courses and Degrees page.	View a history of grade changes.
Transfer Credit Detail	SAD_EXT_CRG_TRCR	Click the <b>Referenced</b> link on the Courses and Degrees page.	View transfer credit details about external courses.
External Course Comments	SAD_EXT_CRG_COMM	Click the <b>Course Comment</b> link on the Courses and Degrees page.	Enter comments about external courses.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Regional	SAD_EXT_EDUC_REG	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Application/ Transcript Loads &gt; Education &gt; Regional</b></li> <li>• <b>Student Recruiting &gt; Maintain Prospects &gt; Academic Information &gt; Education &gt; Regional</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; Academic Information &gt; Education &gt; Regional</b></li> <li>• <b>Records and Enrollment &gt; Transfer Credit Evaluation &gt; External Education &gt; Regional</b></li> </ul>	(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"> <li>• <b>Student Admissions &gt; Application/ Transcript Loads &gt; Education &gt; Self Reported Courses</b></li> <li>• <b>Student Recruiting &gt; Maintain Prospects &gt; Academic Information &gt; Education &gt; Self Reported Courses</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; Academic Information &gt; Education &gt; Self Reported Courses</b></li> <li>• <b>Records and Enrollment &gt; Transfer Credit Evaluation &gt; External Education &gt; Self Reported Courses</b></li> </ul>	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.

The screenshot shows the 'External Education' page with the 'Courses and Degrees' tab selected. The user is logged in as John Roberts (AD1000). The page title is 'School Information' and it shows '1 of 1' records. The main form contains the following fields and controls:

- \*External Org ID:** 000010021 (with a search icon) 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.

The screenshot shows the 'Career Data' section of the External Education page. It displays the following fields and controls:

- Data Number:** 1
- \*Career:** High Schl (dropdown)
- Term Type:** Semester (dropdown)
- External Term:** FALL (dropdown) Fall
- Term Year:** 1998
- Academic Level:** 11th Grade (dropdown)  Dismissed from School
- From Date:** 01/09/1995 (calendar icon)
- To Date:** 01/06/1998 (calendar icon)
- [Comments](#)
- Transcript Status:**
  - \*Action: Received (dropdown)
  - Transcript Date: (calendar icon)
  - Date Received: 26/10/1998 (calendar icon)
  - Transcript Type: (dropdown)
  - Transcript Status: (Invalid Val) (dropdown)
  - Data Source: School (dropdown)
  - Data Medium: Hard Copy (dropdown)
- Transcript Summary:**
  - Table with columns: Term, GPA/Units, Rank, \*Summary Type, External Term, Ext Year, Acad Level, Institution.
  - Row 1: 1, Grade 11, Fall, 1998, 11th Grade, PSU
- External Subjects:**
  - Table with columns: \*External Subject Area, \*Course Level, Institution, GPA Type, External GPA, Converted GPA.
  - Row 1: 1, (search icon), (dropdown), PSU, (search icon), (search icon), (search icon)
- Transfer To:** Course Credits (dropdown)

Field or Control	Description
<b>External Org ID</b> (external organization ID)	The source of the external data. The system automatically populates this field from the initial add of <b>Last School Attended</b> on the Prospect School/Recruiting page or the Application School/Recruiting page if a value is entered. You can edit this field.

<b>Field or Control</b>	<b>Description</b>
<b>Checklist Item Update</b>	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 <b>Action</b> field in the <b>Transcript Status</b> 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

<b>Field or Control</b>	<b>Description</b>
<b>Data Number</b>	The system populates this field automatically. The first data item (or row) you enter is <i>1</i> . The system numbers subsequent rows sequentially.
<b>Career</b>	Select the external career for this external data. Values for this field are delivered with your system as translate values.
<b>Term Type</b>	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> .
<b>External Term</b>	Enter the external term to which this data relates. For example, if this is a Fall transcript, enter <i>FALL</i> in the <b>External Term</b> field. The available values depend on what you enter in the <b>Term Type</b> field. Define external terms on the External Term Table page.  This field is optional; leave it blank until you are ready to enter transfer credit information.
<b>Term Year</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Academic Level</b>	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.
<b>From Date and To Date</b>	Enter the dates of attendance for the career data that you entered.
<b>Dismissed From School</b>	Select this check box if the student was dismissed from the institution.

## Transcript Status

<b>Field or Control</b>	<b>Description</b>
<b>Action</b>	<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 <b>Action</b> field is set to <i>Received</i>, you can link the data to an application on the Application Materials page.</p>
<b>Transcript Date</b>	Enter the date that the transcript was issued. The transcript date must not be later than the received date.
<b>Date Received</b>	Enter the date that your office received the transcript. The received date cannot occur before the transcript date.
<b>Transcript Type</b>	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.
<b>Transcript Status</b>	Select a transcript status. Values for this field are delivered with your system as translate values.
<b>Data Source</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Data Medium</b>	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.
<b>Comments</b>	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.

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**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.

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## Term

Select the Term tab.

<b>Field or Control</b>	<b>Description</b>
<b>Summary Type</b>	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.
<b>External Term and Ext Year</b> (external year)	Select the external term and year relevant to the summary. Define external terms on the External Term Table page

<b>Field or Control</b>	<b>Description</b>
<b>Acad Level</b> (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	+	-		

<b>Field or Control</b>	<b>Description</b>
<b>GPA Type</b> (grade point average type)	Enter the GPA type that is used by the external organization. Define GPA types on the GPA Type Table page.
<b>Ext GPA</b> (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.
<b>Conv GPA</b> (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 <b>External GPA</b> field is copied to the <b>Conv GPA</b> field.
<b>Completed</b>	The value in the <b>Completed</b> field is automatically populated from the value in the <b>Attempted</b> 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	Class Rank	Class Size	Percentile			
1	Grade 12	Unweighted	23	325	93	+	-	
2	HS Overall	Unweighted	20	325	94	+	-	

<b>Field or Control</b>	<b>Description</b>
<b>Class Rank and Class Size</b>	Enter the student's rank in their class and the size of the class.
<b>Percentile</b>	The system automatically calculates the percentile based on the values entered in the <b>Class Rank</b> and <b>Class Size</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>Course Level</b>	Select the course level taken in this area. Values for this field are delivered with your system as translate values.
<b>GPA Type</b> (grade point average type)	Enter the GPA type for the school that the student attended. Define GPA types on the GPA Type Table page.
<b>External GPA</b> (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.



<b>Field or Control</b>	<b>Description</b>
<b>Converted GPA</b> (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 <b>External GPA</b> field is copied into the <b>Converted GPA</b> 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 Subject Area		Courses Attempted	Courses Completed	Units Attempted	Units Completed	Unit Type
1	MATH	4	4	4.00	4.00	Carnegie
2	ENGL	3	3	3.50	3.50	Carnegie

<b>Field or Control</b>	<b>Description</b>
<b>Courses Completed</b>	Enter the number of courses that the student completed if it is different from the number of courses the student attempted.
<b>Units Completed</b>	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:** AD5502 Shari Kirkland

**External Org ID:** 000000001 Cottonwood High School

**External Career:** High Schl

**Data Number:** 1

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**Transcript Comments** Find | View All First 1 of 1 Last

**Created By:** PS + -

**Name:** Locherty, Betty

**Date Entered:** 10/15/2006

**Default Comment:**   Transcript Comment

**Comment:**

Incomplete Transcript: Final Evaluation Pending.

<i>Field or Control</i>	<i>Description</i>
<b>ID, External Org ID</b> (external organization ID), <b>External Career</b> , and <b>Data Number</b>	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.
<b>Default Comment</b> and <b>Comment</b>	If you enter a default comment, the <b>Comment</b> 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**
Apply Defaults

**Data Number:** 1

**Data Source:** School

**Acad Level:** Senior

**Institution:** PSUNV PSU

**Course Type:** Course

**Unit Type:** Carnegie

**Grading Scheme:** Ext 100pct

**External Career:** High Schl

**Term Type:** Semester

**External Term:** FALL Fall

**Term Year:** 2005

**Course Level:** Regular

**Units Taken:** 1.00

**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

<i>Field or Control</i>	<i>Description</i>
<b>Data Number</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Term Type</b>	If you select a value of <i>Other</i> , the <b>Begin Date</b> and <b>End Date</b> fields become available. If you select any other value, the <b>External Term</b> and <b>Term Year</b> fields become available.
<b>Grading Scheme</b>	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.
<b>Apply Defaults</b>	<p>Click to populate the default values to the first row of the <b>External Courses</b> 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.

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**Important!** Always apply defaults before you add multiple rows or enter any external course data.

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## Course

Select the Course tab.

<b>Field or Control</b>	<b>Description</b>
<b>School Subject</b>	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.
<b>Course Nbr</b> (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.

<b>Field or Control</b>	<b>Description</b>
<b>Course Name</b>	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	<a href="#">History</a>	3.4

<b>Field or Control</b>	<b>Description</b>
<b>Units Taken</b>	Appears by default from the value in the <b>Units Taken</b> field in the <b>External Course Defaults</b> group box. The default value is overridden if a value for <b>External Units</b> is defined on the School Course Classification page.
<b>Grade In</b>	Enter grades and grade changes. When you save grade changes, the <b>History</b> link appears.
<b>History</b>	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 <b>Grade In</b> 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.

Course Seq	Transfer Credit	Transfer Credit Status	Transfer Credit Type	Course Comment
1	<input checked="" type="checkbox"/>	<a href="#">Referenced</a>	Other	<a href="#">Course Comment</a> [+/-]
2	<input checked="" type="checkbox"/>	<a href="#">Referenced</a>	Other	<a href="#">Course Comment</a> [+/-]

<b>Field or Control</b>	<b>Description</b>
<b>Transfer Credit</b>	This check box is selected by default.
<b>Transfer Credit Status</b>	The <b>Referenced</b> 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.
<b>(CAN) Transfer Credit Type</b>	This field is available if the <b>Government Reporting</b> check box for Canada is selected on the SA Features (student administration features) page.
<b>Course Comment</b>	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

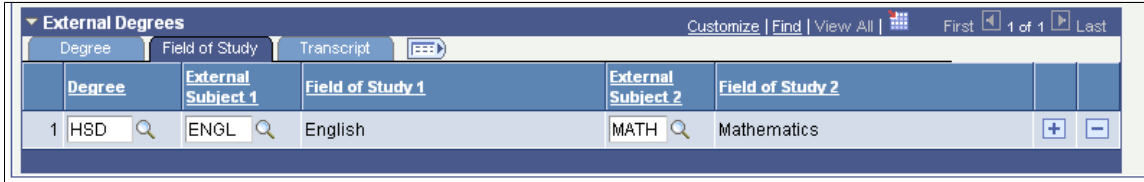
Select the Degree tab.

<b>Field or Control</b>	<b>Description</b>
<b>Degree and Description</b>	If you enter a value in the <b>Degree</b> field, the <b>Description</b> field is populated. If a degree value is not available, enter a description.
<b>Degree Date</b>	Enter the date that the degree was or will be granted.
<b>Degree Status</b>	<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.

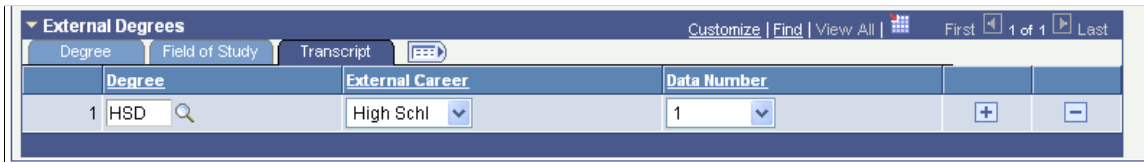


Field or Control	Description
External Subject 1, Field of Study 1, External Subject 2, and Field of Study 2	When you enter external subject information, field of study information appears. If a subject area value is not available, enter the field of study information.

## 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.



Field or Control	Description
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**

**EmpID:** 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>
<b>Articulation Term</b>	The term for which the transfer credit was processed.
<b>Transfer Status</b>	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:**   Course Comment

**Comment:**

Course taken for honors credit.

<i>Field or Control</i>	<i>Description</i>
<b>ID, External Org ID</b> (external organization ID), <b>School Subject</b> , and <b>Course Number</b>	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.
<b>Default Comment</b> and <b>Comment</b>	If you enter a default comment, the <b>Comment</b> 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.

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>
<b>Previous Educational Activity</b>	Select the student's most recent educational activity.
<b>Previous PostSecond Credential</b> (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

Copy Selected Courses

\*Data Source Self-Rpted

\*Course Type Course

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.

<i>Field or Control</i>	<i>Description</i>
<b>Copy to Education</b>	Select the check box for each course that you want to copy. Use the <b>Check All</b> link to copy all the courses.

### Copy Selected Courses

<b>Field or Control</b>	<b>Description</b>
<b>Copy Selected Courses</b>	<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 <b>Transcript Type</b> field, and <i>Incomplete</i> appears by default in the <b>Transcript Status</b> 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						
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"/>

<b>Field or Control</b>	<b>Description</b>
<b>Copy to Education</b>	If a course is copied, the check box is unavailable and the course cannot be copied again.
<b>Course Copied</b>	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>
<b>Transcript Data</b>	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"> <li>• <b>Student Admissions &gt; Applicant Summaries &gt; Education Summary &gt; External Academic Summary</b></li> <li>• <b>Student Recruiting &gt; Prospect Summaries &gt; Education Summary &gt; External Academic Summary</b></li> </ul>	View external academic summary information.
Transcript Data	TRANSCRIPT_SEC1	Click the <b>Transcript Data</b> link on the External Academic Summary page.	View information about external transcripts.
Academic Data Detail	EXT_ACAD_SEC	Click the <b>Academic Data Detail</b> link on the External Academic Summary page.	View external academic data.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
External Subject Summary	EXT_SUBJ_SUMMARY	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Applicant Summaries &gt; Education Summary &gt; External Subject Summary</b></li> <li>• <b>Student Recruiting &gt; Prospect Summaries &gt; Education Summary &gt; External Subject Summary</b></li> </ul>	View summaries of external subjects.
Transcript Data	TRANSCRIPT_SEC2	Click the <b>Transcript Data</b> link on the External Subject Summary page.	View information about external transcripts.
Academic Subject Detail	EXT_SUBJ_SUM_SEC	Click the <b>Academic Subject Detail</b> 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"> <li>• <b>Student Admissions &gt; Applicant Summaries &gt; Education Summary &gt; External Degree Summary</b></li> <li>• <b>Student Recruiting &gt; Prospect Summaries &gt; Education Summary &gt; External Degree Summary</b></li> </ul>	View external degree summary information.
Transcript Data	TRANSCRIPT_SEC3	Click the <b>Transcript Data</b> link on the External Degree Summary page.	View information about external transcripts.
External Course Summary	EXT_COURSE_SUMMARY	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Applicant Summaries &gt; Education Summary &gt; External Course Summary</b></li> <li>• <b>Student Recruiting &gt; Prospect Summaries &gt; Education Summary &gt; External Course Summary</b></li> </ul>	View external course summary information.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Transcript Data	TRANSCRIPT_SEC4	Click the <b>Transcript Data</b> link on the External Course Summary page.	View information about external transcripts.
External Course Detail	EXT_COURSE_DTL	Click the <b>Course Detail</b> 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.

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.

<b>Field or Control</b>	<b>Description</b>
<b>Academic Data Detail</b>	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.

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

<i>Field or Control</i>	<i>Description</i>
<b>Academic Subject Detail</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Sort Degree By</b>	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			
<b>Select Courses By</b>				<b>Sort Courses By</b>			
Acad Level:	<input type="text"/>	Org ID:	<input type="text"/>	<input type="button" value="Search"/>		Data Source	
Data Source:	<input type="text"/>	Subject:	<input type="text"/>				
Course Level:	<input type="text"/>	Term Year:	<input type="text"/>				
						Find   View All   First   1 of 1   Last	
<b>Organization</b>	<b>Sch Subj</b>	<b>Course</b>	<b>Description</b>	<b>Acad Level</b>	<b>Data Source</b>	<b>Units</b>	<b>Grade</b>
Cottonwood High School	FNLN	FNLN2	SPANISH 2	Unknown	Self-Rpted	3.00	4.3
						<a href="#">Transcript Data</a>	<a href="#">Course Detail</a>

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.

<i>Field or Control</i>	<i>Description</i>
<b>Course Detail</b>	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"> <li>• <b>Student Admissions &gt; Application Evaluation &gt; Evaluate Application Materials &gt; General Materials</b></li> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; General Materials</b></li> </ul>	<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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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"> <li>• <b>Student Admissions &gt; Applicant Summaries &gt; General Materials Summary</b></li> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; General Materials Summary</b></li> </ul>	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).

<b>Field or Control</b>	<b>Description</b>
<b>Material Group</b>	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.
<b>Material Type</b>	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.
<b>Material Nbr</b> (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.
<b>Checklist Item Update</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Date Received</b>	The system uses the system date as the default date on which materials were received. You can edit this field.
<b>Date Recorded</b>	The system uses the system date as the default date on which materials were recorded. You can edit this field.
<b>Rcmd Type (recommender type)</b>	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.
<b>Comments</b>	Enter any notes or text for this general materials entry.
<b>Recommender Information</b>	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.
<b>Address Information</b>	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

<b>Field or Control</b>	<b>Description</b>
<b>Add Attachment</b>	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).

<b>Field or Control</b>	<b>Description</b>
<b>ID</b>	If this recommender is in your database, enter the person's ID.
<b>Name</b>	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.
<b>Title</b>	Enter the recommender's title.

<b>Field or Control</b>	<b>Description</b>
<b>Org ID</b> (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.
<b>Location</b>	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.
<b>Org Name</b> (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.

<b>General Materials Summary</b>						
Moses Morning			SFEK00064			
<b>Select Materials By</b>				<b>Sort Materials By</b>		
<b>Material Group:</b>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> <b>Material Group</b> <input type="button" value="Search"/>			
<b>Material Type:</b>	<input type="text"/>	<input type="text"/>	<input type="radio"/> <b>Material Type</b>			
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	<a href="#">Recommender</a>	

You must first enter general material information for this person in the General Materials page.

### Select Materials By

<b>Field or Control</b>	<b>Description</b>
<b>Material Group</b>	Enter a material group to search for a summary of general materials for this person based on material group.

<i>Field or Control</i>	<i>Description</i>
<b>Material Type</b>	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>
<b>Material Group</b>	Enter a material group to sort the findings by material group.
<b>Material Type</b>	Enter a material type to sort the findings by material type.
<b>Search</b>	Click the <b>Search</b> button to locate information that matches your search criteria.

### Other Page Elements

<i>Field or Control</i>	<i>Description</i>
<b>Recommender</b>	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
<b>Test Scores:</b>	<input type="text" value="UGTESTS"/>	Undergraduate Test Scores	<a href="#">Test Scores</a>
<b>Academic Summary:</b>	<input type="text" value="UGSUMMRY"/>	Undergraduate Academic Summary	<a href="#">Academic Summary</a>
<b>External Courses:</b>	<input type="text" value="UGCRSES"/>	Undergraduate External Courses	<a href="#">External Courses</a>
<b>External Subjects:</b>	<input type="text" value="UGSUBJCT"/>	Undergraduate Subjects	<a href="#">External Subjects</a>
<b>Transcripts:</b>	<input type="text" value="UGTSCRIPT"/>	UG External Transcripts	<a href="#">Transcripts</a>
			<a href="#">General Materials</a>

An application for this person must already exist.

<i>Field or Control</i>	<i>Description</i>
<b>Test Scores</b>	<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 <b>Test Scores</b> link to view a list of test scores that are associated with this applicant. The Select Test Scores page appears.</p>
<b>Academic Summary</b>	<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 <b>Academic Summary</b> link to view a list of academic summaries that are associated with this applicant. The Select Academic Summary Data page appears.</p>
<b>External Courses</b>	<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 <b>External Courses</b> link to view a list of external courses that are associated with this applicant. The Select External Courses page appears.</p>

<i>Field or Control</i>	<i>Description</i>
<b>External Subjects</b>	<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 <b>External Subjects</b> link to view a list of external courses that are associated with this applicant. The Select External Subjects page appears.</p>
<b>Transcripts</b>	<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 <b>Transcripts</b> link to view a list of transcripts that are associated with this applicant. The Select Transcripts page appears.</p>
<b>General Materials</b>	<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>
<b>Go</b>	<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>
<b>Recommender Detail</b>	<p>If an interviewer or recommended is linked to a general material entry, click the <b>Recommender Detail</b> link to view information about that person.</p>

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## 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	<b>Student Admissions</b> > <b>Application Entry</b> > <b>Application Materials</b> > <b>Application Materials</b>	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 <b>Test Scores</b> 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.
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 .

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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.
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Materials Summary	APPL_MATL_SUMMARY	<b>Student Admissions &gt; Applicant Summaries &gt; Application Materials Summary &gt; Materials Summary</b>	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	<b>Student Admissions &gt; Applicant Summaries &gt; Application Materials Summary &gt; Test Score Summary</b>	View summary test scores information that is associated with a particular application and academic program.
Transcripts Summary	APPL_TRNS_SUMMARY	<b>Student Admissions &gt; Applicant Summaries &gt; Application Materials Summary &gt; Transcripts Summary</b>	View summary transcript information that is associated with a particular application and academic program.
Academic Summary	APPL_SUMM_SUMMARY	<b>Student Admissions &gt; Applicant Summaries &gt; Application Materials Summary &gt; Academic Summary</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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	<b>Student Admissions &gt; Applicant Summaries &gt; Application Materials Summary &gt; Academic Subjects Summary</b>	View summary information about academic subjects that are associated with a particular application and academic program.
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	<b>Student Admissions &gt; Applicant Summaries &gt; Application Materials Summary &gt; Course Summary</b>	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.

<a href="#">Materials Summary</a> <a href="#">Test Score Summary</a> <a href="#">Transcripts Summary</a> <a href="#">Academic Summary</a> <a href="#">Academic Subjects Summary</a>					
Dario Miselli		<b>ID</b>	AD6999		
<b>Academic Career:</b>	Undergraduate	<b>Application Nbr:</b>	00024151		
<b>Prog Nbr:</b>	0	<b>Academic Program:</b>	Liberal Arts Undergraduate		
Material Group	Material Type	Material Nbr	Date Recorded	Type	<a href="#">Detail</a>

You must first attach materials to the application on the Application Materials page.

<b>Field or Control</b>	<b>Description</b>
<b>Interviewer Detail</b>	Click this link to view about interviewer information about this material type. The Interviewer Detail page appears.
<b>Recommender Detail</b>	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					
<b>Academic Career:</b> Undergraduate		<b>Application Nbr:</b>	00024151					
<b>Prog Nbr:</b> 0		<b>Academic Program:</b>	Liberal Arts Undergraduate					
<b>Select Academic Summary By</b>								
<b>Acad Level:</b>	<input type="text"/>	<b>Data Source:</b>	<input type="text"/>	<b>Sum Type:</b> <input type="text"/> <input type="button" value="Search"/>				
<b>Org ID:</b>	<input type="text"/>	<b>Institution:</b>	PSUNV	<b>Term Year:</b> <input type="text"/>				
Data Nbr	Organization	Institution	Sum Type	Data Source	Conv GPA	Percent	Units	
1	Redondo Union High School	PSU	HS Overall	School	3.880	99	20.00	<a href="#">Transcript Data</a> <a href="#">App Summary Detail</a>

<b>Field or Control</b>	<b>Description</b>
<b>Acad Level</b> (academic level)	Select the academic level for which you want to search for academic summary information.
<b>Org ID</b> (organization ID)	Enter the organization ID for which you want to search for academic summary information.
<b>Data Source</b>	Select the data source for which you want to search for academic summary information.
<b>Institution</b>	Enter the academic institution for which you want to search for academic summary information.
<b>Sum Type</b> (summary type)	Enter the summary type for which you want to search for academic summary information.
<b>Term Year</b>	Enter the term year for which you want to search for academic summary information.

<b>Field or Control</b>	<b>Description</b>
<b>Search</b>	Click this button to view information matching your search criteria.
<b>App Summary Detail</b> (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					
<b>Academic Career:</b>	Undergraduate	<b>Application Nbr:</b>	00024151					
<b>Prog Nbr:</b>	0	<b>Academic Program:</b>	Liberal Arts Undergraduate					
<b>Select Subject By</b>								
<b>Acad Level:</b>	<input type="text"/>	<b>Data Source:</b>	<input type="text"/>	<b>Subject:</b> <input type="text"/> <input type="button" value="Search"/>				
<b>Org ID:</b>	<input type="text"/>	<b>Course Level:</b>	<input type="text"/>	<b>Term Year:</b> <input type="text"/>				
Organization	Subject	Data Source	Crse Level	Hbr Crses	Units	Conv GPA		
Redondo Union High School	Math	School	Honors				<a href="#">Transcript Data</a>	<a href="#">Acad Subject Detail</a>
Redondo Union High School	English	School	AP				<a href="#">Transcript Data</a>	<a href="#">Acad Subject Detail</a>
Redondo Union High School	Economics	School	AP				<a href="#">Transcript Data</a>	<a href="#">Acad Subject Detail</a>
Redondo Union High School	Biology	School	Regular				<a href="#">Transcript Data</a>	<a href="#">Acad Subject Detail</a>

<b>Field or Control</b>	<b>Description</b>
<b>Acad Level</b> (academic level)	Select the academic level for which you want to search for academic subjects summary information.
<b>Org ID</b> (organization ID)	Enter the organization ID for which you want to search for academic summary information.
<b>Data Source</b>	Select the data source for which you want to search for academic subjects summary information.
<b>Course Level</b>	Select the course level for which you want to search for academic subjects summary information.
<b>Subject</b>	Enter the subject for which you want to search for academic subjects summary information.



<b>Field or Control</b>	<b>Description</b>
<b>Term Year</b>	Enter the term year for which you want to search for academic subjects summary information.
<b>Search</b>	Click the Search button to view information matching your search criteria.
<b>Acad Subject Detail</b> (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.

The screenshot shows the 'Course Summary' page for student Dario Miselli (ID: AD6999). It displays academic career (Undergraduate), application number (00024151), and program (Liberal Arts Undergraduate). Below this is a search section with filters for Acad Level, Data Source, Subject, Org ID, and Course Level, along with a Search button. At the bottom, a table lists course data for Redondo Union High School.

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	<a href="#">Transcript Data</a> <a href="#">App Course Detail</a>

You must first attach course summaries to the application on the Application Materials page.

<b>Field or Control</b>	<b>Description</b>
<b>Acad Level</b> (academic level)	Select the academic level for which you want to search for course summary information.
<b>Org ID</b> (organization ID)	Enter the organization ID for which you want to search for course summary information.
<b>Data Source</b>	Select the data source for which you want to search for course summary information.
<b>Course Level</b>	Select the course level for which you want to search for course summary information.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Subject</b>	Enter the subject for which you want to search for course summary information.
<b>Search</b>	Click the Search button to view information matching your search criteria.
<b>Transcript Data</b>	Click this link to view transcript data. The Transcript Data page appears.
<b>App Course Detail</b> (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	<b>Student Recruiting &gt; External Org Summaries &gt; Org Admissions Summary &gt; Prospects by Organization</b>	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	<b>Student Recruiting &gt; External Org Summaries &gt; Org Admissions Summary &gt; Applicants by Organization</b>	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

**Organization Type:** School      **Proprietorship:** Public

[Org Primary Location](#)

[Contact Information](#)

**Select Prospects By**

**Institution:**

**Career:**

**Acad Prog:**

**Admit Term:**

**Recruiting Status:**

**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
<input type="button" value="Carry ID"/>	AA0037	Greene,Ronald	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> <a href="#">Prospect Programs</a>
<input type="button" value="Carry ID"/>	AD5022	Smith,Doug	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> <a href="#">Prospect Programs</a>
<input type="button" value="Carry ID"/>	AD5023	Smith,Jane	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> <a href="#">Prospect Programs</a>
<input type="button" value="Carry ID"/>	AD5024	Smith,John	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> <a href="#">Prospect Programs</a>
<input type="button" value="Carry ID"/>	AD5025	Smith,Amy	Undergrad	PSU	2001 Fall	Applicant	<input checked="" type="checkbox"/> <a href="#">Prospect Programs</a>

Field or Control	Description
<b>Institution</b>	Enter the academic institution for which you want to search for prospect information.
<b>Career</b>	Enter the academic career for which you want to search for prospect information.
<b>Acad Prog (academic program)</b>	Enter the academic program for which you want to search for prospect information.

<b>Field or Control</b>	<b>Description</b>
<b>Admit Term</b>	Enter the admit term for which you want to search for prospect information.
<b>Recruiting Status</b>	Select the recruiting status for which you want to search for prospect information.
<b>Applied</b>	Select to view records for prospects who applied to your institution.
<b>Sort Prospects By</b>	Select whether you want to view prospects by career, admit term, or recruiting status.
<b>Search</b>	Click this button find the prospects that match your search criteria. the system displays matches in the bottom portion of the page.
<b>Carry ID</b>	Click this button to carry forward this person's ID to the next page.
<b>Prospect Programs</b>	Click this link to view a listing of the academic programs for a prospect. The Prospect Programs page appears.
<b>Org Primary Location</b> (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.
<b>Contact Information</b>	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

**Organization Type:** School      **Proprietorship:** Public

[Org Primary Location](#)

[Contact Information](#)

Select Applicants By

**Institution:**

**Career:**

**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	<input type="checkbox"/>	<a href="#">Applicant Programs</a>
	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year	<input type="checkbox"/>	<a href="#">Applicant Programs</a>
	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year	<input type="checkbox"/>	<a href="#">Applicant Programs</a>
	AD5022		00022766	Undergrad	PSU	First-Year	<input type="checkbox"/>	<a href="#">Applicant Programs</a>
	AD5022		00022766	Undergrad	PSU	First-Year	<input type="checkbox"/>	<a href="#">Applicant Programs</a>

<b>Field or Control</b>	<b>Description</b>
<b>Career and Institution</b>	These values are based on your user defaults. Edit the values if necessary.
<b>Admit Type</b>	Enter an admit type.
<b>Admit Term</b>	Enter the admit term of the applicants you want to view.
<b>Acad Program (academic program)</b>	Enter an academic program.
<b>Status</b>	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.
<b>Acad Career (academic career), Admit Term, Admit Type, and Status</b>	Select an option to view prospects by academic career, admit term, admit type, or status.
<b>Search</b>	Click this button to view the applicants that match your search criteria. The system displays matches in the bottom portion of the page.
<b>Carry ID</b>	Click this button to carry forward this person's ID to the next page.
<b>Applicant Programs</b>	Click this link to view the applicant program details. The Applicant Programs page appears.

<i>Field or Control</i>	<i>Description</i>
<b>Org Primary Location</b> (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.
<b>Contact Information</b>	Click this link to view contacts that are associated with this school. The Contact Information page appears.

## Viewing Prospects and Applicants Assigned to a Specific Recruiter

This section discusses how to:

- View prospects assigned to a specific recruiter by category.
- View applicants assigned to a specific recruiter by category.
- View prospects assigned to a specific recruiter by region.
- View applicants assigned to a specific recruiter by region.

## Pages Used to View Prospects Assigned to a Specific Recruiter by Category

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Prospects by Category	RCR_PRSP_CAT_SUMM	<b>Student Recruiting</b> > <b>Student Recruiters</b> > <b>Summaries</b> > <b>Recruiter Summary</b> > <b>Prospects By Category</b>	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	<b>Student Recruiting</b> > <b>Student Recruiters</b> > <b>Summaries</b> > <b>Recruiter Summary</b> > <b>Applicants by Category</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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	<b>Student Recruiting &gt; Student Recruiters &gt; Summaries &gt; Recruiter Summary &gt; Prospects by Region</b>	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	<b>Student Recruiting &gt; Student Recruiters &gt; Summaries &gt; Recruiter Summary &gt; Applicants By Region</b>	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.

<b>Prospects By Category</b>		<b>Applicants By Category</b>		<b>Prospects By Region</b>		<b>Applicants By Region</b>	
<b>Institution:</b> PeopleSoft University		<b>Career:</b> Undergraduate		<b>Recruiter ID:</b> ADREC1		<b>Name:</b> Chavez,John Joseph	
<b>Select Prospects By</b>				<b>Sort Prospects By</b>			
<b>Admit Term:</b> <input type="text"/>		<b>Group:</b> Academic		<input checked="" type="radio"/> <b>Admit Term</b>		<input type="button" value="Search"/>	
<b>Category:</b> <input type="text"/>		<b>Responsible:</b> <input type="text"/>		<input type="radio"/> <b>Category</b>			
				<input type="radio"/> <b>Group</b>			
Find   View All   First 1-6 of 7 Last							
<b>Carry ID</b>	<b>ID</b>	<b>Name</b>	<b>Admit Term</b>	<b>Applied</b>	<b>Category</b>	<b>Group</b>	<b>Primary</b>
<input type="button" value="Carry ID"/>	AD5211	Reiter, Eric	2001 Sprng	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>
<input type="button" value="Carry ID"/>	AD5213	Rice, Lisa	2001 Sum	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input checked="" type="checkbox"/>
<input type="button" value="Carry ID"/>	AD5201	Berry, Kim	2001 Sum	<input type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>
<input type="button" value="Carry ID"/>	AD5221	Yost, Linda	2001 Sum	<input type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>
<input type="button" value="Carry ID"/>	AD5205	Howe, Craig	2001 Fall	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input type="checkbox"/>
<input type="button" value="Carry ID"/>	AD5207	Hume, Janice	2001 Fall	<input checked="" type="checkbox"/>	Honors Stu	Academic	<input checked="" type="checkbox"/>

<b>Field or Control</b>	<b>Description</b>
<b>Select Prospects By</b>	Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.
<b>Admit Term</b>	Enter an admit term to view prospects for a specific term.
<b>Category</b>	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.  <b>Note:</b> You cannot search on <i>REGN</i> on this page. To search on region, access the Prospects by Region page.
<b>Group</b>	Select a recruitment group to search for a broader recruiting group.
<b>Responsible</b>	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.
<b>Admit Term, Category, and Group</b>	Select an option to view prospects by admit term, category or group.
<b>Search</b>	Click this button to view prospects that match your search criteria.

<b>Field or Control</b>	<b>Description</b>
<b>Carry ID</b>	Click this button to carry forward this person's ID to other pages that you access.
<b>Prospect Program</b>	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.

The screenshot shows the 'Applicants By Category' page. At the top, there are navigation tabs: 'Prospects By Category', 'Applicants By Category' (selected), 'Prospects By Region', and 'Applicants By Region'. Below the tabs, the page displays filters for 'Institution' (PeopleSoft University), 'Career' (Undergraduate), 'Recruiter ID' (ADREC1), and 'Name' (Chavez, John Joseph). A 'Select Applicants By' section contains fields for 'Admit Term', 'Acad Prog', 'Category', 'Group' (Academic), 'Status', and 'Responsible'. A 'Sort Applicants By' section has radio buttons for 'Category' and 'Group', and a 'Search' button. Below the filters is a table with columns: ID, Name, Appl Nbr, Admit Type, Category, Group, Primary, and Program Detail. The table lists five applicants, each with a 'Carry ID' button and a 'Program Detail' link.

ID	Name	Appl Nbr	Admit Type	Category	Group	Primary	Program Detail
<a href="#">Carry ID</a> AD5205	Howe, Craig	00022817	Transfer	Honors Stu	Academic	<input checked="" type="checkbox"/>	<a href="#">Program Detail</a>
<a href="#">Carry ID</a> AD5207	Hume, Janice	00022818	Transfer	Honors Stu	Academic	<input checked="" type="checkbox"/>	<a href="#">Program Detail</a>
<a href="#">Carry ID</a> AD5211	Reiter, Eric	00022821	First-Year	Honors Stu	Academic	<input checked="" type="checkbox"/>	<a href="#">Program Detail</a>
<a href="#">Carry ID</a> AD5213	Rice, Lisa	00022823	First-Year	Honors Stu	Academic	<input checked="" type="checkbox"/>	<a href="#">Program Detail</a>
<a href="#">Carry ID</a> AD5217	Schadt, Randle	00022826	First-Year	Honors Stu	Academic	<input type="checkbox"/>	<a href="#">Program Detail</a>

<b>Field or Control</b>	<b>Description</b>
<b>Select Applicants By</b>	Enter the appropriate values that designate which applicants you want to see. You must complete at least one field as search criteria.
<b>Admit Term</b>	Enter an admit term to view applicants for a specific term.
<b>Acad Program (academic program)</b>	Enter an academic program to specify a particular program.
<b>Category</b>	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.  <b>Note:</b> You cannot search on <i>REGN</i> on this page. To search on region, access the Applicants by Region.

<b>Field or Control</b>	<b>Description</b>
<b>Group</b>	Select a recruitment group to search for a broader recruiting group.
<b>Status</b>	To view only applicants with a certain program status, select a value in the status field.
<b>Responsible</b>	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.
<b>Admit Term, Category, Group, and Status</b>	Select an option to view applicants by admit term, category, group, or status.
<b>Search</b>	Click this button to view the applicants that match your search criteria.
<b>Carry ID</b>	Click this button to carry forward this person's ID to other pages that you access.
<b>Program Detail</b>	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

**Recruiter ID:** ADREC1

**Career:** Undergraduate

**Name:** Chavez,John Joseph

**Select Prospects By**

**Admit Term:**

**Region:**

**Last School Attended:**

**Responsible:**

**Sort Prospects By**

**Admit Term**

**Lst School**

**Region**

	ID	Name	Admit Term	Applied	Region	Last School Attended	Primary	
<input type="button" value="Carry ID"/>	AD5200	Bish,Jane	2001 Sprng	<input checked="" type="checkbox"/>	AZ	Ironwood	<input checked="" type="checkbox"/>	<a href="#">Prospect Program</a>
<input type="button" value="Carry ID"/>	AD5212	Reyes,Tony	2001 Sprng	<input checked="" type="checkbox"/>	AZ	Ironwood	<input checked="" type="checkbox"/>	<a href="#">Prospect Program</a>
<input type="button" value="Carry ID"/>	AD5216	Sawyer,Harold	2001 Sum	<input checked="" type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/>	<a href="#">Prospect Program</a>
<input type="button" value="Carry ID"/>	AD5204	Artz,Larry	2001 Sum	<input checked="" type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/>	<a href="#">Prospect Program</a>
<input type="button" value="Carry ID"/>	AD5210	Loomis,Doris	2001 Fall	<input type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/>	<a href="#">Prospect Program</a>
<input type="button" value="Carry ID"/>	AD5220	Wright,Martha	2001 Fall	<input checked="" type="checkbox"/>	AZ	Apache	<input checked="" type="checkbox"/>	<a href="#">Prospect Program</a>

<b>Field or Control</b>	<b>Description</b>
<b>Select Prospects By</b>	Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.
<b>Admit Term</b>	Enter an admit term to prospects for a specific term.
<b>Region</b>	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.
<b>Last School Attended</b>	Enter a value to search for prospects by the last school that they attended.
<b>Responsible</b>	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.
<b>Admit Term, Lst School (last school attended), and Region</b>	Select an option to view prospects by admit term, last school attended, or region.
<b>Search</b>	Click this button to view the prospects that match your search criteria.
<b>Carry ID</b>	Click this button to carry forward this person's ID to other pages that you access.

<b>Field or Control</b>	<b>Description</b>
<b>Prospect Program</b>	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.

The screenshot shows the 'Applicants By Region' page with the following details:

- Navigation:** Prospects By Category | Applicants By Category | Prospects By Region | **Applicants By Region**
- Filters:**
  - Institution: PeopleSoft University
  - Career: Undergraduate
  - Recruiter ID: ADREC1
  - Name: Chavez, John Joseph
- Select Applicants By:**
  - Admit Term: [Text Field]
  - Acad Prog: [Text Field]
  - Responsible: [Dropdown]
  - Last School Attended: [Text Field]
  - Region: AZ [Text Field]
  - Status: [Dropdown]
- Sort Applicants By:**
  - Last School
  - Region
  -
- Table:**

Carry ID	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"/> <a href="#">Program Detail</a>
[Carry ID]	AD5204	Artz, Larry	00022816	Transfer	AZ	Apache	<input type="checkbox"/> <a href="#">Program Detail</a>
[Carry ID]	AD5212	Reyes, Tony	00022822	Transfer	AZ	Ironwood	<input type="checkbox"/> <a href="#">Program Detail</a>
[Carry ID]	AD5220	Wright, Martha	00022828	First-Year	AZ	Apache	<input type="checkbox"/> <a href="#">Program Detail</a>

<b>Field or Control</b>	<b>Description</b>
<b>Select Applicants By</b>	Enter the appropriate values that designate which applicants you want to view. You must complete at least one field as search criteria.
<b>Admit Term</b>	Enter an admit term to view applicants for a specific term.
<b>Region</b>	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.
<b>Acad Prog (academic program)</b>	Enter an academic program to specify a particular academic program.
<b>Status</b>	Status an application status to view applicants with a particular status.

<b>Field or Control</b>	<b>Description</b>
<b>Responsible</b>	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.
<b>Last School Attended</b>	Enter a value to search for applicants by the last school that they attended.
<b>Admit Term, Lst School (last school attended), and Region</b>	Select an option to view applicants by admit term, last school attended, or region.
<b>Search</b>	Click this button to view the applicants that match your search criteria.
<b>Carry ID</b>	Click this button to carry forward this person's ID to other pages that you access.
<b>Program Detail</b>	Click this link to access the Program Summary page and view a list of the programs for an applicant.

# Adding and Updating Applications

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## 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	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Biographical Details</b>	Enter an applicant's biographical information.
Addresses	SCC_BIO_DEMO_ADDR	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Addresses</b>	Enter an applicant's address.
Regional	SCC_BIO_DEMO_REG	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Regional</b>	Enter region specific information, if applicable, based on country code.
Personal	SCC_PERSONAL_INFO	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Personal</b>	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.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Application Program Data	ADM_APPL_PROG_ENT	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Application Program Data</b>	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	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Additional Information</b>	Add or update common attributes for program, plan and subplan.
Application Regional	SAD_APPL_REG_DATA	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application Regional</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Application Regional</b></li> </ul>	Add or update country-specific data regarding the application.
Evaluation	ADM_APPL_EVAL1_SEC	Click the <b>Evaluation</b> link on the Application Program Data page.	Add an evaluation status for this program.
Deposit Fees	ADM_APPL_DEP_FEE	Click the <b>Calculate Deposit Fees</b> 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 <b>Calculate Deposits Fees</b> link becomes available if a value is defined on the Application Center Table.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Deposit Fees (entry)	ADM_APPL_ENTRY2_S	Click the <b>Calculate Deposit Fees</b> button or the <b>Deposit Fees</b> link on the Deposit Fees page.	Enter deposit fees for the applicant. <hr/> <b>Note:</b> 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	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Application Data</b>	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 <b>Calculate Application Fees</b> 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 <b>Show Tender Details</b> 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 <b>Show Tender Details</b> 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 <b>Currency Detail</b> link on the Application Fees page.	Obtain details on the currency conversion.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Application Items	ADM_APPL_ENTRY3_S	Click the <b>Transaction Summary</b> 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 <b>Show Tender Details</b> link on the Application Items page.	View tender details.
Application School/Recruiting	ADM_APPL_RECRUIT	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Application School/Recruiting</b>	Enter recruiting information about an applicant.
Additional Details	SAD_PESC_OTHER_SCH	<b>Student Admissions &gt; Application Entry &gt; Add Application &gt; Additional Details</b>	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.

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**Note:** Leave the **Application Number** field as all zeros in order for the auto-numbering feature to work properly.

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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		
<b>Program Data</b> <span style="float:right">Find   View All   First 1 of 2   Last</span>					
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		<a href="#">CAS Details</a>			
<b>Program Enrollment</b>					
Cohort Tag:	FALL-2011	APT Instance:			
Year of Program:	1st Year				
<b>Program Status</b>					
Status:	Admitted	Action Date:	29/08/2013		
*Program Action:	ADMT Admit	Action Reason:			
Last Updated On:	29/08/2013 10:15:24AM By: PS		<a href="#">Evaluation</a> <a href="#">Calculate Deposit Fees</a>		
<b>Plan Data</b> <span style="float:right">Find   View All   First 1 of 1   Last</span>					
*Academic Plan:	BIOLBS Biology (BS)	Major:	BS		
<b>Sub-Plan Data</b> <span style="float:right">Find   View All   First 1 of 1   Last</span>					
*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.

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	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.
<b>Admit Term</b>	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.
<b>Expected Graduation Term</b>	Enter the term in which the student expects to graduate.
<b>Academic Program</b>	<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>
<b>Academic Load</b>	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> .
<b>Joint Program</b>	Select the <b>Joint Program</b> check box if the applicant is applying to a joint program.
<b>Dual Program</b>	This field becomes available when you select the <b>Joint Program</b> check box. Enter the joint academic program. Define dual programs on the Academic Program page.
<b>Campus</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Academic Shift</b>	<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 <a href="#">Mapping Academic Shifts to Admit Terms</a></p>
<b>Status</b>	Because you are entering a new application, this field automatically displays <i>Applicant</i> .
<b>Program Action</b>	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.
<b>Action Date</b>	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).
<b>Action Reason</b>	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.
<b>Last Updated On and By</b>	The date on which the page was last updated and the name of the person who last updated the page.

<b>Field or Control</b>	<b>Description</b>
<b>Career Number</b>	Available if the <b>Program Action</b> 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 <b>Readmit Processing Required</b> 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.
<b>Academic Plan</b>	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.
<b>Sub-Plan</b>	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.
<b>Calculate Deposit Fees</b>	Click this link to calculate an enrollment deposit. The Calculate Deposit Fees Page appears.  If your application center has designated a deposit fee code that requires a deposit, and you enter a program status of <i>Admit</i> , the <b>Calculate Deposit Fees</b> link appears. You can not exit the component until you calculate the enrollment deposit. Application centers are designated on the Application Data page.
<b>Evaluation</b>	Select this link to enter the status of the application. Values for this field are defined on the Evaluation Status Table.



<b>Field or Control</b>	<b>Description</b>
<b>Create Program</b>	<p>To matriculate the applicant at the same time you are entering the new application, select <i>Matriculation</i> in the <b>Program Action</b> field. The <b>Create Program</b> button becomes available.</p> <p>Click the <b>Create Program</b> button to save the component. Also, note that if you select <i>Matriculation</i> in the <b>Program Action</b> field, you are <i>required</i> to click the <b>Create Program</b> 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 <b>Prog Number</b> 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><b>Note:</b> 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>
<b>Go</b>	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			
<b>Program Data</b> <span style="float:right">Find   View All First 1 of 1 Last</span>					
Program Number: 0		Effective Date: 03/09/2013			
Academic Program: LAU Lib Arts		Effective Sequence: 1			
<b>Program Attributes</b> <span style="float:right">Find First 1-3 of 3 Last</span>					
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	
<b>Plan Attributes</b> <span style="float:right">Find First 1-2 of 2 Last</span>					
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					
<b>Sub-Plan Data</b> <span style="float:right">Find   View All First 1 of 1 Last</span>					
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.

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**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.*

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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.

<span>Application Regional</span>   <span>Application Data</span>   <span>Application School/Recruiting</span>   <span>Application Student Response</span>	
Damien Crowther <span style="float: right;">ADAUS005</span>	
<b>Academic Institution:</b>	PeopleSoft Australia Uni
<b>Academic Career:</b>	Undergraduate <span style="float: right;"><b>Application Number:</b> 00024433</span>
▼ <b>Australia</b>	
<b>Program Data</b> <span style="float: right;">Find   View All   First ◀ 1 of 1 ▶ Last</span>	
<b>Program Number:</b>	0 <span style="float: right;"><b>Effective Date:</b> 08/03/2009</span>
<b>Admit Term:</b>	0629 2009 Sem2 <span style="float: right;"><b>Effective Sequence:</b> 1</span>
<b>Academic Program:</b>	BENG BEng
<b>*Mode of Attendance:</b>	Internal Mode of Attendance ▼
<b>Cohort:</b>	0900 🔍 2009 Commencing
<b>Funding Source:</b>	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.

▼ <b>New Zealand</b>	
<b>Program Data</b> <span style="float: right;">Find   View All   First ◀ 1 of 1 ▶ Last</span>	
<b>Program Number:</b>	0 <span style="float: right;"><b>Effective Date:</b> 06/27/2006</span>
<b>Admit Term:</b>	0505 2003 Fall <span style="float: right;"><b>Effective Sequence:</b> 1</span>
<b>Academic Program:</b>	LAU Lib Arts
<b>*Funding Source:</b>	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					
<b>Program Data</b> <span style="float: right;">Find   View All First 1 of 1 Last</span>					
Program Number: 0		Effective Date: 08/20/2008			
Admit Term: 2090 2009		Effective Sequence: 1			
Academic Program: H010 BussEcon					
<b>Program Information</b>					
BRINcode:	<input type="text" value="NL02"/>	NLD Brincode 02	Start Month:	<input type="text" value="9"/>	
Program Code:	<input type="text" value="04401"/>	Business Economics	Start Occasion:		
Academic Year:	<input type="text" value="2009"/>				
Sub Institute:	<input type="text" value="01"/>	Main			
<b>Higher Education Additional Information</b>					
Studielink Status:	<input type="text" value="Enrollment Requested"/>	<input type="checkbox"/> Message 310			
<b>Admission Verification</b>					
Deficiency Status:	<input type="text" value="Not yet determined"/>	<input type="checkbox"/> Message 31K	Transmit	Last Transmit Date	
Prof Requirements Status:	<input type="text" value="Not Applicable"/>	<input type="checkbox"/> Message 31P			
Professional Duties Status:	<input type="text" value="Not applicable"/>	<input type="checkbox"/> Message 31I			
Language Test Status:	<input type="text" value="Not applicable"/>	<input type="checkbox"/> Message 31J			
Approval Higher Year:	<input type="text" value="False"/>	<input type="checkbox"/> Message 31H			
<a href="#">Student Prior Education</a>	<a href="#">Student Data Higher Education</a>	<a href="#">Student Messages</a>			

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.

The screenshot shows a web form with the following sections and fields:

- Payment Information:**
  - Payment Indicator: [Dropdown]
  - Payment Amount: [Text Input]
  - Studielink Form of Payment: [Dropdown]
  - Paid by: [Dropdown]
  - Request Payment Terms:
  - Paid at Brincode: [Text Input]
  - Paid at Institution Name: [Text Input]
  - Barcode: [Text Input]
  - Order Number: [Text Input]
  - Message 19:
  - Message 20:
  - Student Bank Accounts: [Link](#)
- Lot Drawing:**
  - Lot Drawing Type: [Dropdown]
  - Message 31N:
- Additional Information:**
  - Form of Study: [Dropdown]
  - Academic Level: [Dropdown]
  - Funding Applies:
- Prior Education:**
  - Prior Education: [Text Input]
  - Cluster Detail Code: [Text Input]
  - Navigation: Find | View All | First 1 of 1 Last

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

<i>Field or Control</i>	<i>Description</i>
(AUS) Mode of Attendance	<p>The <b>Mode of Attendance</b> 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 <b>Mode of Attendance</b> 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>

<b>Field or Control</b>	<b>Description</b>
<b>(AUS) Cohort</b>	(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.
<b>(AUS) Funding Source</b>	(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.
<b>(NZL) Funding Source</b>	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**

<b>Field or Control</b>	<b>Description</b>
<b>Form of Study</b>	Enter the form of study for which the applicant is registering.
<b>Academic Level</b>	The academic level can be registered separately from the academic program record.
<b>Funding Applies</b>	Select this option to indicate whether funding applies.
<b>Prior Education</b>	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](#)

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**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.

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## Using the Calculate Deposit Fees Page

Access the Calculate Deposit Fees page (Click the **Calculate Deposit Fees** link on the Application Program Data page).

<i>Field or Control</i>	<i>Description</i>
<b>Calculate Deposit Fees</b>	Click this button to access the Deposit Fees page where you can calculate an enrollment deposit fee.
<b>Deposit Fees</b>	Click this link to access the Deposit Fees page where you can view details about a person's enrollment deposit.
<b>Deposit Calc Messages</b> (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.

**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.

<b>Field or Control</b>	<b>Description</b>
<b>Application Center</b>	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.
<b>Admit Type</b>	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.
<b>Application Date</b>	The default for the application date is the system date that the application was received. You can override this default.

<b>Field or Control</b>	<b>Description</b>
<b>Academic Level</b>	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.
<b>Created On</b>	The default for the created date is the system date on which you create this application record.
<b>Notification Plan</b>	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> .
<b>Prior Application</b>	Select this check box if this applicant previously applied to this career. This selection is useful for informational and reporting purposes.
<b>Application Method</b>	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.
<b>Previous Attendance</b>	Select this check box if the applicant previously attended the institution.
<b>From Date and To Date</b>	If the Previous Attendance check box is selected, enter the dates from which and to which the applicant previously attended the institution.
<b>Graduated early?</b>	Select this check box if the applicant graduated early from the institution.
<b>Not Currently Attending School</b>	Select this check box if the applicant is not currently attending school.
<b>Electronic Signature</b>	Indicates that the applicant has submitted an electronic signature.
<b>Criminal Conviction</b>	Select this check box if the applicant has a criminal conviction.

<b>Field or Control</b>	<b>Description</b>
<b>Additional Fields</b>	<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>
<b>Housing Interest</b>	<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>
<b>Financial Aid Interest</b>	<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>
<b>Complete</b>	<p>Select this check box if this application is not missing any information and is considered complete by your office.</p>
<b>Date</b>	<p>Enter the date that you marked this application as complete.</p>
<b>External Application Nbr</b> (external application number)	<p>Enter the external application number if you received this application from a service with its own application-numbering scheme.</p>
<b>Fee Type</b>	<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>

<b>Field or Control</b>	<b>Description</b>
<p><b>Calculate Application Fees</b></p>	<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 <b>Calculate Application Fees</b> 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 <b>Status</b> field in the <b>Application Fee Information</b> 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 <b>Run</b> 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><b>Note:</b> 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 <b>Yes</b> is selected for the <b>Application Fee Required</b> field on the Application Center Table page <i>and</i> the <b>Amount Sent to GL</b> value is greater than zero, then when you click the <b>Calculate Application Fees</b> 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 <a href="#">Setting Up Application Processing Centers</a>.</p> <p>See <a href="#">Reviewing and Editing Staged Admission Application Transactions</a></p> <p>See <a href="#">Payment Integration Web Service Operations</a></p> <p>See “Setting Up Application Fees” (Student Financials).</p>

<b>Field or Control</b>	<b>Description</b>
	See “Generating Direct to GL Entries” (Student Financials).
<b>Status</b>	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.
<b>Transaction Summary</b>	Click this link to view information about the application fee for this application. The Application Items Page appears.
<b>Display Errors/Warnings</b>	If any errors occurred during the calculation, click this link to view error details.
<b>Go</b>	Click this button to go to another component.

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**Note:** After this page has been saved, you make changes to this application in the Application Maintenance component.

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## File Attachments

Use this group box to add, delete and view attachments for an admissions application.

<b>Field or Control</b>	<b>Description</b>
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**

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**Application Fees**

Fee Amount: 20.00 USD

Fee Paid: 20.00 USD

Date:

\*Fee Status:

Waive Amount:  USD

Waiver Basis Code:

---

Find | View All First  1-3 of 3  Last

*Tender Category	Tender Amount	*Currency		
<input type="text" value="Credit Card"/>	<input type="text" value="20.00"/>	<input type="text" value="USD"/>	<a href="#">Show Tender Details</a>	<a href="#">Currency Detail</a>
<input type="text" value="Cash"/>	<input type="text"/>	<input type="text" value="USD"/>	<a href="#">Show Tender Details</a>	<a href="#">Currency Detail</a>
<input type="text" value="Electronic Check"/>	<input type="text"/>	<input type="text" value="USD"/>	<a href="#">Show Tender Details</a>	<a href="#">Currency Detail</a>

**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.

<b>Field or Control</b>	<b>Description</b>
<b>Date</b>	The default for this date is your system date. Edit this field to reflect the date the application fee was entered or waived.
<b>Fee Status</b>	<p>Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Deferred, Pending, Received, Waived, and 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 <a href="#">Reviewing and Editing Staged Admission Application Transactions</a></p>
<b>Waive Amount</b>	<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>

<b>Field or Control</b>	<b>Description</b>
<b>Waiver Basis Code</b>	<p>The field is available for edit only if the value in the <b>Fee Status</b> 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 <a href="#">Reviewing and Editing Staged Admission Application Transactions</a></p>
<b>Tender Category</b>	<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><b>Note:</b> For AAWS, partial payment is not allowed and applicants cannot split payments between credit card and check.</p>
<b>Tender Amount</b>	<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 <b>Tender Category</b> field.</p>
<b>Currency</b>	<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 <b>Tender Category</b> field.</p>
<b>Currency Conversion Details</b>	<p>Click this link to obtain details on the currency conversion. The Currency Conversion Page appears.</p>

<i>Field or Control</i>	<i>Description</i>
<b>Show Tender Details</b>	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.

<b>Application Data</b>			
<b>Application Items</b>			
<b>ID:</b>	0162	<b>Application Number:</b>	00024824
<b>Application Fee Date:</b>	11/23/2010	<b>Fee Amount:</b>	20.00 USD
<b>Status:</b>	Received	<b>Fee Paid:</b>	20.00 USD
<b>Waiver Basis Code:</b>		<b>Amount Sent to GL:</b>	20.00 USD
Customize   Find   View All   [Print] [Grid]   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).

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**Note:** To view a summary of a person's financial account, access the Customer Accounts page in PeopleSoft Student Financial.

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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		
<b>Academic Institution:</b>	PeopleSoft University		  	
<b>Academic Career:</b>	Undergraduate		<b>Application Number:</b>	00024144 <a href="#">Events</a>
School Information				
<b>Last School Attended:</b>	000010096 	Richmond College		
<b>Graduation Date:</b>	06/04/1998 			
<b>School Type:</b>	Secondary	<b>Proprietorship:</b>		
<b>City:</b>		<b>State:</b>	<b>Country:</b>	
Recruiting Information				
<b>Region:</b>	CCOAST 	CA Central Coast		<b>Assign Region From</b> <input type="button" value="Home Postal Code"/> <input type="button" value="School Postal Code"/>
<b>From:</b>	Region Tree			
<b>Primary Recruiter ID:</b>	AD1041	Bill Dern	Staff	
Recruiting Categories				
Find   View All   First 1 of 1 Last				
<b>*Category:</b>	HGPA 	High GPA	<b>Group:</b>	Academic  
<b>Sub-Cat:</b>	High 			
<b>Description:</b>				
Recruiters				
Find   View All   First 1 of 1 Last				
<b>Recruiters Prompt</b>	<b>*Recruiter ID</b>		<b>Recruiter Type</b>	<b>Primary:</b>
<input checked="" type="checkbox"/> Recruiters	AD1041 	Bill Dern	Staff	<input checked="" type="checkbox"/>  
<b>Transfer To:</b>	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>
<b>Last School Attended</b>	<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>
<b>Graduation Date</b>	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>
<b>Region</b>	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.
<b>Home Postal Code</b>	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.
<b>School Postal Code</b>	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.
<b>From</b>	<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 <b>Home Postal Code</b> button.</p> <p><i>School:</i> Assigned if you click the <b>School Postal Code</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>Category</b>	<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 <b>Region</b> field will be available.</p>
<b>Group</b>	The group under which this category falls automatically displays when you move out of the <b>Category</b> field.
<b>Sub-Category</b>	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.
<b>Description</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Recruiters Prompt</b>	<p>Select this check box if you want <i>all</i> recruiters in your database to be available when you prompt on the <b>Recruiter ID</b> 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 <b>Recruiter ID</b> 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 <b>Region</b> field.</p> <p>If you entered the region according to the last school attended using the <b>School Postal Code</b> button; the <b>Prompt Table</b> 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 <b>Home Postal Code</b> button, the <b>Prompt Table</b> 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 <b>Recruiter ID</b> field. The <b>Prompt Table</b> display field in this case displays <i>Recruitment Category</i>.</p>
<b>Recruiter ID</b>	<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 <b>Recruiters Prompt</b> 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>

<b>Field or Control</b>	<b>Description</b>
<b>Primary</b>	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 <b>Prmy Recruiter ID</b> (primary recruiter ID) field. You can use this field to report on primary versus non-primary recruiters.
<b>Events</b>	Click this link to sign an applicant up for attendee events. The Attendee Events page appears.
<b>Go</b>	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.

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.

<i>Field or Control</i>	<i>Description</i>
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.

<i>If the Communication, Checklist or Comments Pages are Accessed From the:</i>	<i>The Variable Data for the Following Administrative Function is Supplied:</i>	<i>Data that is Transferred</i>
Application Program Data page	ADMP Admissions Program	ID, academic career, student career number, application number, application program number.
Application Data page	ADMA Admissions Application	ID, academic career, student career number, application center.
Application School/Recruiting page	EVNT Event	ID

### 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.

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**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.

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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:

<b>Term</b>	<b>Definition</b>
<b>ID</b>	<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>
<b>Academic Institution</b>	Enter the academic institution to which you want to quickly admit the student.
<b>Academic Career</b>	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.



<b>Term</b>	<b>Definition</b>
<b>Term</b>	<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><b>Note:</b> Quick Admit uses the <b>Max Program Effective Date for Term</b> field from the Term/Session Table when populating the <b>Effective Date</b> on Student Program/Plan. If the current date is less than or equal to the <b>Max Program Effective Date</b> for the activation term, the <b>Effective Date</b> field on Student Program/Plan will be set to current date. If the current date is greater than the <b>Max Program Effective Date</b> for the activation term, the <b>Effective Date</b> field on Student Program/Plan will be set to the <b>Max Program Effective Date</b> defined for activation term.</p> <hr/> <p>See “Defining Terms, Sessions, and Session Time Periods” (Campus Solutions Application Fundamentals)</p>
<b>Add</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Quick Admit - Biographical Details	SCC_BIO_DEMO_PERS	<b>Records and Enrollment &gt; Enroll Students &gt; Quick Admit a Student &gt; Biographical Details</b>	Enter or update a student's biographic and demographic information.
Quick Admit - Regional	SCC_BIO_DEMO_REG	<b>Records and Enrollment &gt; Enroll Students &gt; Quick Admit a Student &gt; Regional</b>	Enter or update a student's information according to regional data requirements.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Quick Admit - Program/Plan	PROGRAM_PLAN	<b>Records and Enrollment &gt; Enroll Students &gt; Quick Admit a Student &gt; Program/Plan</b>	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	<b>Records and Enrollment &gt; Enroll Students &gt; Quick Admit Batch Apps &gt; Selection Criteria</b>	Enroll students into classes without going through a formal admissions process.
Quick Admit - Assignment Criteria	QUICK_ADMIT_CREATE	<b>Records and Enrollment &gt; Enroll Students &gt; Quick Admit Batch Apps &gt; Assignment Criteria</b>	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.

The screenshot shows the 'Program/Plan' tab selected in a navigation bar. Below the navigation bar, there are several fields and controls:

- Career:** UGRD Undergrad
- Institution:** PSAUS PSAUS
- Term:** 0621 2009 Sem1
- NEW** (button)
- Program and Plan** (header)
- Academic Program Primary:** BART (with search icon) BArt
- Campus:** MAIN (with search icon) Main Campus
- Academic Plan:** PSYCHOLOGY (with search icon) Psychology
- Admit Term:** 0621 (with search icon) 2009 Semester 1
- Requirement Term:** 0621 (with search icon) 2009 Semester 1
- Expected Graduation Term:** (with search icon)
- Mode of Attendance:** Internal Mode of Attendance (dropdown menu)
- Cohort:** 0900 (with search icon) 2009 Commencing
- Funding Source:** CSP (with search icon) Commonwealth Supported Place
- [Residency](#) (link)

**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:

<i>Field or Control</i>	<i>Description</i>
<b>Academic Program Primary</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Campus</b>	Enter the campus where the student is going to take the primary academic program.
<b>Academic Plan</b>	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.
<b>Admit Term</b>	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.
<b>Requirement Term</b>	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 <b>Admit Term</b> value.
<b>Expected Graduation Term</b>	Enter the term in which you expect the student to graduate. Define term values on the Term Table page.
<b>(NZL) Funding Source</b>	This field is used by New Zealand institutions.
<b>(AUS) Mode of Attendance</b>	<p>The <b>Mode of Attendance</b> 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 <b>Mode of Attendance</b> 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>

<b>Field or Control</b>	<b>Description</b>
<b>(AUS) Cohort</b>	(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.
<b>(AUS) Funding Source</b>	(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.
<b>Residency</b>	Click to display the Residency Official page and record residency information that has been verified by your institution.
<b>Quick Enrollment</b>	Click to access the Quick Enroll component, where you can process enrollment transactions for the student.
<b>Enrollment Appointments</b>	Click to access the Appointments component, where you can add and update enrollment appointments for the student.
<b>Student Program Plan</b>	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:

<b>Field or Control</b>	<b>Description</b>
<b>Student Career Nbr</b> (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.

<i>Field or Control</i>	<i>Description</i>
<b>Prim Prog</b> (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**).

<i>Field or Control</i>	<i>Description</i>
<b>Academic Institution</b>	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.
<b>Academic Career</b>	Enter the academic career from which you want to select quick-admitted students. You can enter multiple academic careers.
<b>Academic Program</b>	Enter the academic program from which you want to select quick-admitted students. You can enter multiple academic programs.
<b>Academic Plan</b>	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**

Create Applicant / Prospect    
  Delete from Holding Table

**Create Records from Quick Enrl**

Create History    
  Create New    
  Create Application    
  Create Prospect

**Create History Values**

*Acad Level: <input style="width: 80%;" type="text"/>	*Admit Type: <input style="width: 80%;" type="text"/>
*Appl Ctr: <input style="width: 80%;" type="text"/>	*Acad Load: <input style="width: 80%;" type="text"/>
*Appl Meth: <input style="width: 80%;" type="text"/>	*Rcrtg Stat: Applicant <input style="width: 80%;" type="text"/>
*Recr Ctr: <input style="width: 80%;" type="text"/>	*Refrl Srce: APPL <input style="width: 80%;" type="text"/> Applicatn

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 <input style="width: 80%;" type="text"/> PSU	*Career: UGRD <input style="width: 80%;" type="text"/> Undergrad
*Admit Term: 0390 <input style="width: 80%;" type="text"/> 2000 Sprng	*Admit Type: FYR <input style="width: 80%;" type="text"/> First-Year
*Acad Prog: LAU <input style="width: 80%;" type="text"/> Lib Arts	*Prog Actn: ADMT <input style="width: 80%;" type="text"/> Admit
*Action Rsn: AUTO <input style="width: 80%;" type="text"/> Auto Assign	*Acad Level: 1st Year <input style="width: 80%;" type="text"/>
*Appl Ctr: <input style="width: 80%;" type="text"/>	*Acad Load: <input style="width: 80%;" type="text"/>
*Appl Meth: <input style="width: 80%;" type="text"/>	*Rcrtg Stat: Applicant <input style="width: 80%;" type="text"/>
*Recr Ctr: <input style="width: 80%;" type="text"/>	*Refrl Srce: APPL <input style="width: 80%;" type="text"/> Applicatn

Find | View All    
 First  1 of 1  Last

\*Academic Plan: SOC  Sociology

<i>Field or Control</i>	<i>Description</i>
<b>Create Applicant/Prospect</b>	Select this option to create prospect and application records for the selected group of students.

<b>Field or Control</b>	<b>Description</b>
<b>Delete From Holding Table</b>	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 <b>Run</b> 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.
<b>Create History</b>	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.
<b>Create New</b>	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 <b>Assignment Values</b> group box.
<b>Create Application</b>	Select this check box to create applications for the selected group of students. This field is available if you select the <b>Create New</b> check box.
<b>Create Prospect</b>	Select this check box to create prospect records for the selected group of students specified on the Selection Criteria page. If the <b>Create Application</b> 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:

<b>Field or Control</b>	<b>Description</b>
<b>Acad Level</b> (academic level)	Select the academic level that you want to assign to the selected group.
<b>Admit Type</b>	Enter the admit type that you want to assign to selected group.
<b>Appl Ctr</b> (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.
<b>Acad Load</b> (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> .



<b>Field or Control</b>	<b>Description</b>
<b>Appl Meth</b> (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> .
<b>Rertg Stat</b> (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> .
<b>Recr Ctr</b> (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> .
<b>Refrl Srce</b> (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> .
<b>Copy History Values to New</b>	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:

<b>Field or Control</b>	<b>Description</b>
<b>Institution</b>	Enter the academic institution that you want to assign to the selected group.
<b>Career</b>	Enter the academic career that you want to assign to the selected group.
<b>Academic Plan</b>	Enter the academic plan that you want to assign to the selected group of students.

<b>Field or Control</b>	<b>Description</b>
<b>Acad Prog</b> (academic program)	Enter the academic program that you want to assign to the selected group.
<b>Prog Actn</b> (program action)	Enter the program action that you want to assign to the selected group.
<b>Action Rsn</b> (action reason)	Enter the action reason that you want to assign to the selected group.
<b>Admit Term</b>	Enter the admit term that you want to assign to the selected group.
<b>Academic Plan</b>	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:

<b>Test</b>	<b>Page Where Data Comes From</b>
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Applicants From Tests	ADM_APPL_PROC_PARM	<b>Student Admissions &gt; External Test Score Processing &gt; Create Applicants from Tests</b>	Indicate which type of application you want to load.
Application Program Parms (application program parameters)	ADM_PROG_PARMS	<b>Student Admissions &gt; External Test Score Processing &gt; Create Applicants from Tests &gt; Application Program Parms</b>	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	<b>Student Admissions &gt; External Test Score Processing &gt; Create Applicants from Tests &gt; Application Data Parms</b>	Set up default application data parameters to be filed in on new applications. The values you select for the fields on this page are inserted on the Application Data page when the new applications are loaded.
Application Recruit Parms (application recruit parameters)	ADM_RECRUIT_PARMS	<b>Student Admissions &gt; External Test Score Processing &gt; Create Applicants from Tests &gt; Application Recruit Parms</b>	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 Params (application program parameters) page (**Student Admissions > External Test Score Processing > Create Applicants from Tests > Application Program Params**).

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

The screenshot shows the 'Application Program Params' page with the following fields and values:

- Run Control ID:** 1
- 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: (empty)
- Plan Data:**
  - Acad Plan: ENGL-BA (English (BA))
- Sub-Plan Data:**
  - Sub-Plan: (empty)

**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
<b>Admit Term</b>	Enter the admit term for these applicants. Define admit terms on the Term Values Table page.
<b>Acad Load</b> (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.
<b>Acad Program</b> (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.
<b>Campus</b>	Enter the campus being applied to within your institution. Define campuses on the Campus Table page.

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	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.
<b>Prog Actn</b> (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.
<b>Action Reason</b>	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.
<b>Acad Plan</b> (academic plan)	Enter an academic plan for these applications. Define academic plans on the Academic Plan Table page.
<b>Sub-Plan</b>	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**).

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

The screenshot shows the 'Application Data Parm' page with the following elements:

- Navigation Tabs:** Create Applicants From Tests, Application Program Parm, **Application Data Parm**, Application Recruit Parm.
- Run Control ID:** 1
- Buttons:** Report Manager, Process Monitor, Run.
- Application Data Section:**
  - \*Application Center:** UGR1 (Undergrad)
  - Admit Type:** FYR (First-Year)
  - Additional Information:**
    - Housing Interest:** On Campus
    - Financial Aid Interest
  - Application Fee Information:**
    - Fee Type:** Standard
  - File Information:**
    - Complete
- Other Fields:**
  - Academic Level:** 1st Year
  - \*Notification Plan:** Regular
  - Application Method:** Hard Copy

**Note:** Some of the fields on this page appear automatically according to your user defaults. Edit these fields as needed.

<b>Field or Control</b>	<b>Description</b>
<b>Application Center</b>	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.
<b>Housing Interest</b>	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> .
<b>Financial Aid Interest</b>	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.
<b>Fee Type</b>	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> .
<b>Complete</b>	Select this check box to mark these applications complete.
<b>Admit Type</b>	Enter the admit type that you want entered for these applications. Define admit types on the Admit Type Table page.
<b>Academic Level</b>	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.
<b>Notification Plan</b>	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> .
<b>Application Method</b>	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 <span style="float: right;"><a href="#">Report Manager</a> <a href="#">Process Monitor</a> <input type="button" value="Run"/></span>			
<b>Recruiting Information</b>			
Region from:	Region <input type="text" value="Region"/>	Region:	CCOAST <input type="text" value="CCOAST"/> CA Central Coast
*Recruiting Center:	UGRD <input type="text" value="UGRD"/> Undergrad		
<b>Recruiting Category</b>			
Category:	HGPA <input type="text" value="HGPA"/> High GPA		
Sub-Cat:	High <input type="text" value="High"/>		
Recruiter ID:	AA0012 <input type="text" value="AA0012"/> Sandra Kim	<input checked="" type="checkbox"/> Primary Recruiter	

Field or Control	Description
<b>Region from</b>	<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 <b>Region</b> 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>
<b>Region</b>	<p>Enter a region to be entered on these applications. This field is available only when you enter <i>Region</i> in the <b>Region from</b> field. It is automatically assigned when <i>Address</i> is entered. Define regions on the Region Tree page.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Recruiting Center</b>	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.
<b>Category</b>	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.
<b>Sub-Category</b>	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, Low, and Medium</i> .
<b>Recruiter ID</b>	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.
<b>Primary Recruiter</b>	Select this check box if you want the recruiter that you selected to be the primary recruiter for these applications.

Click the **Run** button to run the Create Applicants from Tests process at user-defined intervals.

When this process runs, the system looks to the defaults you have set up on the Installation Defaults - AD page and creates a prospect record based on the Create Prospect setting.

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**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.

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## Related Links

[Setting Up Admission Installation Defaults](#)

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Application Program Data	ADM_APPL_PROG_MNT	<b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application Program Data</b>	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	<b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application Data</b>	Update information for an application.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Application School/Recruiting	ADM_APPL_RECRUIT	<b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application School/Recruiting</b>	Update or add recruiting information data.  See <a href="#">Entering Recruiting Information for an Application</a> .
Application Student Response	ADM_APPL_STDNT_RSP	<b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application Student Response</b>	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	<b>Student Admissions &gt; Application Maintenance &gt; Program Addition</b>	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**).

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**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.

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<b>Field or Control</b>	<b>Description</b>
<b>UCAS Personal ID, UTT Personal ID, or Apply Candidate ID</b>	Any one of these links appears depending on the type of application. Click the link to go to the corresponding application page.

<b>Field or Control</b>	<b>Description</b>
<b>Sequence</b>	The default of the sequence is 1. The sequence appears in the field to the right of the <b>Effective Date</b> field.  When you enter more than one row for the same effective date, the system automatically increments the sequence.

<b>Field or Control</b>	<b>Description</b>
<b>Program Action</b>	If you are adding a new row, the <b>Program Action</b> 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.

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**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.

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## 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.

<b>Field or Control</b>	<b>Description</b>
<b>Reason</b>	Enter a Student Response Reason code, for example <i>FAID</i> (financial aid). Define reason codes on the Response Reason Table page.

<b>Field or Control</b>	<b>Description</b>
<b>External Org ID</b> (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 <b>External Org ID</b> 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 <b>Free Form Institution</b> check box on the Installation - AD page.</p>
<b>Date</b>	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
<b>Program Data</b>			
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		
<b>Program Enrollment</b>			
Cohort Tag:	FALL-2011	APT Instance:	
Year of Program:	1st Year		
<b>Program Status</b>			
Status:	Applicant	Action Date:	02/09/2013
*Program Action:	APPL Application	Action Reason:	
Last Updated On:		By:	Evaluation
Career Number:	0		
<b>Plan Data</b>			
*Academic Plan:	PHYSICS Physics	Major	
<b>Sub-Plan Data</b>			
*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	<b>Student Admissions &gt; Applicant Summaries &gt; Application Summary</b>	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	<b>Student Admissions &gt; Application Fees and Deposits &gt; Application Fees Process</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Application Fees (Batch)	APP_FEE_CALC	<b>Student Admissions &gt; Application Fees and Deposits &gt; Review Batch Application Fees</b>	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	<b>Student Admissions &gt; Application Fees and Deposits &gt; Application Fee Calc Messages</b>	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**).

<b>Field or Control</b>	<b>Description</b>
<b>Batch ID</b>	The Batch Application Fees process assigns a batch ID after you initiate the process.
<b>Academic Institution, Application Center, and Admit Term</b>	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.
<b>Display Application Fees</b>	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.*

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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. 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Basis of Admission Table</b>	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	<b>Records and Enrollment &gt; Career and Program Information &gt; Basis of Admission</b>	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>
<b>Include In Offer</b>	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 <b>Include in Offer</b> check box on the Basis of Admission page.
<b>Include In Transcript</b>	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 <b>Include in Transcript</b> check box on the Basis of Admission page.
<b>Long Description</b>	<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

<b>*Basis of Admission:</b>	GBAP <input type="text"/>	Grade Point Average Basis	+ -
<b>Application Nbr:</b>	00022768 <input type="text"/>	<b>Application Program Nbr:</b>	0 <input type="text"/>
<b>*Admit Term:</b>	<input type="text"/>	<b>Academic Program:</b>	LAU <input type="text"/>
<b>Begin Date:</b>	10/25/2004 <input type="text"/>	<input checked="" type="checkbox"/> <b>Include in Offer</b>	
<b>End Date:</b>	<input type="text"/>	<input type="checkbox"/> <b>Include in Transcript</b>	
<b>Long Description:</b>	Applicant's grade point average met minimum requirements for admission.		

**Transfer To:** Application Maintenance

<i>Field or Control</i>	<i>Description</i>
<b>Basis of Admission</b>	Enter a basis of admission code from the list of valid values. Define basis of admission codes on the Basis of Admission page.
<b>Application Nbr</b> (application number)	Enter an application number to assign the basis of admission to a specific application. (optional)
<b>Application Program Nbr</b> (application program number)	Enter an application program number to assign the basis of admission to a specific program. (optional)
<b>Admit Term</b>	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.
<b>Academic Program</b>	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)

<b>Field or Control</b>	<b>Description</b>
<b>Begin Date</b>	The default for the begin date is your system date.
<b>End Date</b>	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 <b>Include in Offer</b> check box.
<b>Include in Offer</b>	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.
<b>Include In Transcript</b>	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.
<b>Long Description</b>	<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>
<b>Go</b>	Click this button to go to another component.

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## Recording Comments and Conditions for Admission

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**Important!** Letter Generation (Letter Gen) is a deprecated product. 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)

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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.

<i>Winword Merge Field</i>	<i>PeopleSoft RECORD.FIELD</i>
AdmCommentCd	ADM_COMMENTS.ADM_COMMENT_CD
AdmCommentDL	ADM_COMMENTS.DESCRLONG
AdmCommentDE	COMMENT_CDE_TBL.DESCR
AdmCommentDS	COMMENT_CDE_TBL.DESCRSHORT
AdmCommentTerm	ADM_COMMENTS.ADMIT_TERM
AdmCommentProg	ADM_COMMENTS.ACAD_PROG
AdmCommentBegin	ADM_COMMENTS.BEGIN_DT
AdmCommentEnd	ADM_COMMENTS.END_DT
AdmCommentType	ADM_COMMENTS.COMMENT_TYPE

### Related Links

“Understanding Communication Management” (Campus Community Fundamentals)

## Pages Used to Record Comments and Conditions for Admission

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Admissions Comments Table	ADM_COMMENTS_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Application Evaluation &gt; Admissions Comments Table</b>	Define admission comment codes.
Admissions Comments	STDNT_ADM_COMMENTS	<b>Student Admissions &gt; Application Evaluations &gt; Application Decisions &gt; Admission Comments</b>	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

**\*Description:**

**Short Description:**   **Include in Offer**  **Include In Transcript**

**Long Description:**

**Comment Type**  **Conditional**  **Procedural**

<i>Field or Control</i>	<i>Description</i>
<b>Comment Type</b>	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)

<b>Field or Control</b>	<b>Description</b>
<b>Include In Offer</b>	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 <b>Include in Offer</b> check box on the Admission Comments page.
<b>Include In Transcript</b>	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 <b>Include in Transcript</b> check box on the Admission Comments page.
<b>Long Description</b>	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:**  Scholarship-Trustees **Comment Type**  Conditional  Procedural

**\*Admit Term:**  **Academic Program:**

**Begin Date:**   **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:**

<b>Field or Control</b>	<b>Description</b>
<b>Admission Comment Code</b>	Enter a code. Define comment codes on the Admission Comment Table page.
<b>Admit Term</b>	Enter an admit term. If an applicant was admitted to more than one academic program, he or she can have multiple admit terms.
<b>Academic Program</b>	Enter an academic program. Applicants can be admitted to multiple academic programs. (optional)
<b>Comment Type</b>	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)
<b>Begin Date</b>	The default for the begin date is your system date.
<b>End Date</b>	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 <b>Include in Offer</b> check box.
<b>Include in Offer</b>	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 <b>Include in Offer</b> field on the Admission Comment Table page is selected. You can change the setting for this applicant here.
<b>Include In Transcript</b>	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 <b>Include in Transcript</b> field on the Admission Comment Table page is selected. You can change the setting for this applicant here.
<b>Long Description</b>	The long description appears from the Admission Comment Table page. You can change the long description for this applicant here.
<b>Go</b>	Click this button to go to another component.

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## 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

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## 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”

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## 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](#)

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## 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”

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## 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.

The screenshot shows the 'Conversion Data Profile' interface. At the top, it displays 'Cvt Pro ID: EDI\_CONV' and 'Description: EDI TS130/TS189 Conversn Prof'. Below this is a 'Conversion' section with 'Cvt TypeID: ETHNIC\_GRP' and 'EDI TS130/TS189 Ethnic Group'. There are checkboxes for 'Setid Based' and 'No-Value Pass Thru', and a 'Default Value' field. The main part of the interface is a table titled 'Conversion Values' with columns for 'Internal Value', 'Int Deflt', and 'External Value'. The table lists eight rows of data:

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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; Load Process</b>	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 Parms	Name Usage <span style="float: right;">Find   View All    First  1 of 1  Last</span>
Male: <input style="width: 80%;" type="text"/>	Usage Order    EDI Name Type
Female: <input style="width: 80%;" type="text"/>	1 <input style="width: 80%;" type="text"/> <span style="float: right;"> </span>
Unknown: <input style="width: 80%;" 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.

<i>Field or Control</i>	<i>Description</i>
<b>Regulatory Region</b>	The system uses the value entered here to populate ethnic group fields during TS130 staging.  <b>Important!</b> Ensure that the ethnic groups defined on the Conversion Data Profile page match those defined for the regulatory region entered here.
<b>Create Acknowledgement (TS131)</b>	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.
<b>Institution</b>	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.
<b>File Name</b>	Enter the path to where you want the system to write the file, and enter the name of the created file.



<b>Field or Control</b>	<b>Description</b>
<b>Male, Female, and Unknown</b>	<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>
<b>EDI Name Type</b>	<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.

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## 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.

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**Note:** Be cautious when editing the data in your staging files prior to posting so that you do not inadvertently create duplicate records.

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If you find an error in these pages *after* the posting process, you need to go to the applicable page in your application to make any changes.

This section discusses how to review EDI TS130:

- Staging process options.
- Organization staging process options.
- Name data.
- Address data.
- Staging bio/demo data.
- Staging bio/demo (2) data.
- Requirements, attributes, and proficiencies.
- Previous college data.
- Staging organization demographic data.
- Staging academic status data.
- Staging activity data.
- Staging test score data.
- Staging session data.
- Staging academic summary data.
- Staging course data.
- Staging degree data.
- Staging additional information.
- Messages in the staging table.

### **See Also**

The Postsecondary Electronic Standards Council Website

## Pages Used to Review and Edit the EDI TS130 Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS130 Process Options	ADM_TS130_PROC_OPT	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Process Options</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Org Process Options</b>	Review or edit the process options for external organization records in your EDI TS130 staging table.
EDI TS130 Names	ADM_TS130_NAMES	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Names</b>	Review or edit the names of applicants loaded through the EDI TS130 data load.
EDI TS130 Addresses	ADM_TS130_ADDR	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Addresses</b>	Review or edit the addresses of applicants loaded through the EDI TS130 data load.
EDI TS130 Bio/Demo (biographical/demographic)	ADM_TS130_BIODEMO1	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Bio/Demo</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Bio/Demo (2)</b>	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
EDI TS130 RAP (requirements, attributes, and proficiencies)	ADM_TS130_RAP	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 RAP</b>	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	<b>Student Admissions &gt; Application Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Previous Colleges</b>	Review or edit previous college data loaded through the EDI TS130 data load.
EDI TS130 Org Data (organization data)	ADM_TS130_ORG_DEMO	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Org Data</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Acad Status</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Activities</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Test Scores</b>	Review or edit test score data loaded through the EDI TS130 data load.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
EDI TS130 Sessions	ADM_TS130_SES	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Sessions</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Academic Summary</b>	Review or edit academic summary data loaded through the EDI TS130 data load.
EDI TS130 Courses	ADM_TS130_CRS	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Courses</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Degrees</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Additional Info</b>	Review or edit additional information loaded through the EDI TS130 data load.
EDI TS130 Messages	ADM_TS130_MSGS	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; TS130 Staging &gt; EDI TS130 Messages</b>	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
<b>Processing Options</b>					
*Edit:	Complete ▾	*Search:	Complete ▾	*Post:	Purge ▾
<b>Error Indicators</b>					
<input type="checkbox"/>	Last Name	<input type="checkbox"/>	First Name	<input type="checkbox"/>	Test Component
<input type="checkbox"/>	Course Error				
<b>Search / Match Results</b>					
Order Nbr:	0	Matches:	0		

### Processing Options

Field or Control	Description
<b>Edit</b>	<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 <b>Error Indicators</b> 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>

<b>Field or Control</b>	<b>Description</b>
<b>Search</b>	<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>
<b>Post</b>	<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>

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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.

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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

<b>Field or Control</b>	<b>Description</b>
<b>Last Name, First Name, Test Component, and Course Error</b>	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 <b>Edit</b> field.



## Search/Match Results

<i>Field or Control</i>	<i>Description</i>
<b>Order Nbr</b>	You know that the search/match/post process found a match and did not post the suspense record when the <b>Search</b> field contains <i>Perform</i> and displays the search order number that led to the match in the <b>Order Number</b> field. Use this information to decide whether or not a possible duplication exists.
<b>Matches</b>	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.

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

<b>Field or Control</b>	<b>Description</b>
<b>Edit</b>	<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>
<b>Search</b>	<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>
<b>Post</b>	<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>

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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

<b>Field or Control</b>	<b>Description</b>
<b>Matches</b>	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	
<b>Trans ID:</b>	ADM_TRNS_TS130	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound		
<b>Ctrl Num:</b>	0901	<b>Dt Loaded:</b>	10/08/2004				
<b>Last Name:</b>	Harris	<b>First Name:</b>	Melissa	<b>Middle Initial:</b>	N		
<b>Name Type</b> Find   View All First 1 of 1 Last							
Given Name (Name at Birth)							
<b>Name Components</b> Find   View All First 1-3 of 3 Last							
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	
<b>Trans ID:</b>	ADM_TRNS_TS130	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound		
<b>Ctrl Num:</b>	0901	<b>Dt Loaded:</b>	10/08/2004				
<b>Last Name:</b>	Harris	<b>First Name:</b>	Melissa	<b>Middle Initial:</b>	N		
<b>Addresses</b> Find   View All First 1 of 1 Last							
<b>Name Type:</b> Given Name (Name at Birth)							
Find   View All First 1-3 of 3 Last							
<b>Address Type:</b>	Home	Address					
<b>Address Type:</b>	Mailing	Address					
<b>Address Type:</b>	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.

The screenshot shows a web application interface with several tabs at the top: "EDI TS130 Names", "EDI TS130 Addresses", "EDI TS130 Bio/Demo" (which is selected), "EDI TS130 Bio/Demo (2)", and "EDI TS130 RAP". Below the tabs, there is a summary section with the following data:

<b>Trans ID:</b>	ADM_TRNS_TS130	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound
<b>Cntrl Num:</b>	0901	<b>Dt Loaded:</b>	10/08/2004		
<b>Last Name:</b>	Harris	<b>First Name:</b>	Melissa	<b>Middle Initial:</b>	N

Below this is a section titled "Bio/Demo Data" with the following fields:

- ID:** [Empty text box]
- SSN:** [Masked text box: XXX-XX-XXXX]
- Date of Birth:** [Date picker: 07/04/1983]
- Birth Location:** [Text box: CHICAGO]
- Birth Country:** [Dropdown: USA] United States
- Birth State:** [Dropdown: IL] Illinois

At the bottom is a "Reference Numbers" section with a search bar and a table:

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

<b>Ref Nbr</b>	PIN	<b>Number:</b>	0543
<b>Qualifier:</b>			

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.

<b>Field or Control</b>	<b>Description</b>
<b>ID</b>	<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 <b>Post</b> field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.</p>
<b>Ref Nbr Qualifier</b> (reference number qualifier)	The type of reference number indicated in the EDI TS130 load for this person.
<b>Number</b> (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.

The screenshot shows a web application interface with several tabs at the top: EDI TS130 Names, EDI TS130 Addresses, EDI TS130 Bio/Demo, EDI TS130 Bio/Demo (2) (selected), and EDI TS130 RAP. Below the tabs, there is a summary section with the following data:

- 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 is a section titled "Bio/Demo Data" containing several form fields:

- Citizen Country:** USA (with a search icon) - United States
- Citizenship Status:** 1 (with a search icon) - Native
- Gender:** Female (dropdown menu)
- Name Prefix:** Ms (with a search icon)
- Marital Status:** Unknown (dropdown menu)
- Ethnic Group:** Black (dropdown menu)
- Highest Education Level:** Not Indic (dropdown menu)

At the bottom of the Bio/Demo Data section, there are two checkboxes:  Disabled and  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.

<b>Field or Control</b>	<b>Description</b>
<b>Disabled</b>	The system selects this check box if the record indicates that the person is disabled.
<b>Full-Time Student</b>	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**).

<b>Field or Control</b>	<b>Description</b>
<b>Test/Requirement Code</b>	Indicates a particular national, regional, state, or local requirement for a course.
<b>Description 1</b>	Specifies the <i>main</i> category of the requirement, attribute, or proficiency.
<b>Description 2</b>	Specifies the <i>lesser</i> category of the requirement, attribute, or proficiency.
<b>Usage Indicator</b>	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>Reqm</i> (requirement).
<b>Condition or Response Code</b>	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							
<b>Trans ID:</b>	ADM_TRNS_TS130	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound														
<b>Cntrl Num:</b>	0901	<b>Dt Loaded:</b>	10/08/2004																
<b>Last Name:</b>	Harris	<b>First Name:</b>	Melissa	<b>Middle Initial:</b>	N														
<b>Previous College</b>												Find   View All				First 1 of 1 Last			
<b>Institution Code Qualifier:</b>	<input type="text" value="98"/>																		
<b>Institution Code:</b>	<input type="text" value="456389475-B"/>																		
<b>Begin Date:</b>	<input type="text" value="09/10/2001"/>																		
<b>End Date:</b>	<input type="text" value="06/06/2002"/>																		
<b>Degree:</b>	<input type="text" value="CERT"/> Certificate																		
<b>Degree Date:</b>	<input type="text" value="6/6/2002"/>																		
<b>Previous Institution Name:</b>	<input type="text" value="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							
<b>Trans ID:</b>	ADM_TRNS_TS130	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound														
<b>Cntrl Num:</b>	0901	<b>Dt Loaded:</b>	10/08/2004																
<b>Last Name:</b>	Harris	<b>First Name:</b>	Melissa	<b>Middle Initial:</b>	N														
<b>External Organization</b>												Find   View All				First 1 of 1 Last			
<b>Description:</b>	<input type="text" value="Carlson College"/>																		
<b>*Organization Type:</b>	<input type="text" value="School"/>																		
<b>External Org ID:</b>	<input type="text" value="000010092"/> Landmark College																		
<b>Term Type:</b>	<input type="text" value="Quarter"/>																		
<b>External Career:</b>	<input type="text" value="Undergrad"/>																		
<b>*Inbound School Type:</b>	<input type="text" value="AS"/> Post-Secondary Record Sender																		
<b>ACT Code:</b>	<input type="text"/>			<b>ATP Code:</b>	<input type="text" value="ATP"/>														
<b>FICE Code:</b>	<input type="text"/>			<b>IPEDS Code:</b>	<input type="text"/>														
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.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	The descriptive name of this external organization as provided in the EDI load.
<b>Organization Type</b>	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.
<b>External Org ID</b> (external organization ID)	If the organization search process found a match for this organization in your database, its ID appears. If more than one or no potential match is found during the organization search process, <i>Error</i> appears in the <b>Search</b> field of the Org Process Options page. In such a case, an organization does not appear in this page. To investigate the reason for the error, go to the EDI TS130 Staging - Messages page. If no match is found, you must manually choose the appropriate organization ID. If the organization does not exist, you need to add it to your database and then return to this page to select the new ID.  See “Understanding Organizations” (Campus Community Fundamentals)
<b>Term Type</b>	The type of term used by this external organization.
<b>External Career</b>	The external career for this organization. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Graduate, High School, Law, Medical, and Undergraduate</i> .
<b>Inbound School Type</b>	The EDI school type for this external organization comes from the EDI record. Its description appears next to the field.
<b>ACT Code, ATP Code, FICE Code, and IPEDS Code</b>	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.
<b>Organization Address</b>	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.

The screenshot shows the 'EDI TS130 Acad Status' page with the following data:

- 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
- Eligbl to Rtrn:** Expelled
- Enroll Status:** B31 (Currently Enrolled)
- Residency:** Yes
- Graduation Date:** 06/01/2001
- Return Date:** 10/10/2004

**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.

The screenshot shows the 'EDI TS130 Activities' page with the following data:

- 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 navigation tabs: '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 controls. It contains the following fields:

- \*Test ID:** SATII
- Test Date:** 03/11/2002
- Test Date Error:**
- Acad Level:** 12th Grade
- Test Level:** SAT II

At the bottom of the screenshot is a table titled 'Test Component' with the following data:

Component	Subtest	Score	Percentile	Post	Error
EN English Composition	00001	500.00	95	<input checked="" type="checkbox"/>	<input type="checkbox"/>

<b>Field or Control</b>	<b>Description</b>
<b>Test ID</b>	The ID of the test taken by this person. Define test IDs on the Test Tables page.
<b>Test Date</b>	The PeopleSoft standard date format as translated from the EDI test date.
<b>Test Date Error</b>	The system selects this check box if it detected an error on the test date.
<b>Test Level</b>	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.
<b>Component</b>	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.
<b>Subtest (subtest code)</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Score</b>	The reported score from the EDI load.
<b>Post</b>	The system selects this check box if the component will be posted to your database.
<b>Error</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Term Type</b>	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.
<b>Career</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Ext Term</b> (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 <b>Term Type</b> field. Define external terms on the External Term Table page.
<b>Acad Level</b> (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> .
<b>Term Year</b>	The term year relevant to this session.
<b>From Date and To Date</b>	The first and last date that the applicant attended this school for this session.
<b>Certificate Received Date</b>	The date that you ran the EC Inbound Agent process.
<b>Data Medium</b>	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 shows the 'EDI TS130 Academic Summary' 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

The **Academic Summary** section includes:

- Session Number:** 1
- From Date:** 07/02/2001
- To Date:** 09/19/2001
- Unit Type:** Quarter
- Course Level:** Regular
- External GPA:** 3.000
- Cumulative:** N
- Completed:** 5.00
- Attempted:** 5.00
- Class Size:** [Empty field]
- Class Rank:** [Empty field]
- Hours Earned:** [Empty field]

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 shows the EDI TS130 Courses page with the following data 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** (Session Number: 1, From Date: 07/02/2001, To Date: 09/19/2001)

- External Course Number:** 1
- School Subject:** MATH (Math)
- Course Nbr:** 105 (INTERMEDIATE ALGEBRA)
- EDI School Subject:** MATH (Math)
- Inbound Course Number:** 105 (INTERMEDIATE ALGEBRA)
- EDI External Course Type:** Regular Enrollment
- Course Level:** Regular
- Units Taken:** 5.00
- Grd In/Official:**
- Crse Error:**
- Course Post:**

A **Course Detail** button is visible next to the EDI School Subject field.

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.

<b>Field or Control</b>	<b>Description</b>
<b>External Course Number</b>	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.
<b>Crse Error</b> (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.
<b>Course Post</b>	The system selects this check box if this course will be posted to your database.
<b>School Subject</b>	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 <b>External Subject Area</b> field here, and selects the <b>Crse Error</b> check box. The system compares the subject areas when you post the record.
<b>Course Nbr</b> (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 <b>Crse Error</b> check box. The system compares the course descriptions when you post the record.
<b>Career</b>	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.
<b>EDI School Subject</b>	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 <b>School Subject</b> field with the corresponding subject area from the School Course Classification page. If it does not find a match the system populates the <b>School Subject</b> field with the value in this field. The description appears next to the field.

<b>Field or Control</b>	<b>Description</b>
<b>EDI Course Number</b>	<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 <b>Course Nbr</b> field with the corresponding course number from the School Course Classification page. If it does not find a match the system leaves the <b>Course Nbr</b> field blank and selects the <b>Crse Error</b> check box.</p> <p>The <b>Description</b> 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 <b>Description</b> field.</p>
<b>EDI External Course Type</b>	<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>
<b>Course Level</b>	<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>
<b>Units Taken</b>	<p>The number of units taken for this course.</p>
<b>Grd In/Official</b> (grade in/official)	<p>The grade information for this course.</p>
<b>Course Detail</b>	<p>Click this button to view additional data regarding this course.</p>

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**Note:** View transcript data posted through the EDI load for a person through the Education component or through the Education Summary inquiry component.

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## 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.

The screenshot shows a web application interface with a breadcrumb trail: EDI TS130 Test Scores > EDI TS130 Sessions > EDI TS130 Academic Summary > EDI TS130 Courses > EDI TS130 Degrees. Below the breadcrumb, there are several key-value pairs: 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 is a 'Degree' section with a search bar and navigation controls (Find | View All | First | 1 of 1 | Last). Inside the 'Degree' section, there is a sub-section with 'Session Number:', 'From Date:', and 'To Date:' labels. Below these are fields for 'Degree Nbr:', 'Degree Date:', 'Degree:', 'Description:', 'Honors Category:' (a dropdown menu), 'Degree Status:' (a dropdown menu with 'Complete' selected), 'Field of Study 1:', and 'Field of Study 2:'.

<b>Field or Control</b>	<b>Description</b>
<b>Degree Nbr</b> (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.
<b>Degree Date</b>	The date the student received or will receive this degree.
<b>Honors Category</b>	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> .
<b>Field of Study 1</b> and <b>Field of Study 2</b>	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	
<b>Trans ID:</b>	ADM_TRNS_TS130	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound				
<b>Cntrl Num:</b>	0901	<b>Dt Loaded:</b>	10/08/2004						
<b>Last Name:</b>	Harris	<b>First Name:</b>	Melissa	<b>Middle Initial:</b>	N				
<b>Additional Information</b>									
<b>EDI Trans Type:</b>	Original	<b>Transaction Type:</b>	Postsec						
<b>Ref Nbr Qual:</b>	SY	<b>Status Reason:</b>	B48						
<b>Unit Type:</b>	Q	<b>Reference Number:</b>	900836286						
<b>Cumulative:</b>	Y	<b>Course Level:</b>	U						
<b>Attempted:</b>	5.00	<b>External GPA:</b>	3.000						
<b>Class Rank:</b>		<b>Completed:</b>	5.00						
<b>Hours Earned:</b>	5.000000	<b>Class Size:</b>							
<b>Name Component:</b>	05	<b>Date Time Period:</b>							
<b>Name:</b>	HARRIS								

<b>Field or Control</b>	<b>Description</b>
<b>EDI Trans Type</b>	The purpose of the transaction. Values are <i>Original, Replace, Duplicate, Response, Re-Submission, Confirmation, and Mutually Defined</i> .
<b>Transaction Type</b>	The type or transcript or student record being sent. Values are <i>District or Postsecondary</i> .
<b>Ref Nbr Qual</b> (reference number qualifier)	A code identifying the type of student identification being sent in the <b>Reference Number</b> field. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
<b>Status Reason</b>	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.
<b>Unit Type</b>	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.
<b>Reference Number</b>	The reference information as defined by the reference identification qualifier field.
<b>Cumulative</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Course Level</b>	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.
<b>Attempted</b>	The total number of units the student attempted on this record as transmitted in the last SUM loop of the record.
<b>External GPA</b> (external grade point average)	The GPA for the student as transmitted in the last SUM loop of the record.
<b>Class Rank</b>	The class rank of the student as transmitted in the last SUM loop of the record.
<b>Completed</b>	The total number of units the student attempted and earned on this record as transmitted in the last SUM loop of the record
<b>Hours Earned</b>	The total number of hours included in the GPA for this summary as transmitted in the last SUM loop of the record.
<b>Class Size</b>	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.
<b>Name Component</b>	The code identifying the type of name component. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
<b>Date Time Period</b>	The date the class rank was determined.
<b>Name</b>	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		
<b>Trans ID:</b>	ADM_TRNS_TS130	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound									
<b>Cntrl Num:</b>	0901	<b>Dt Loaded:</b>	10/08/2004											
<b>Last Name:</b>	Harris	<b>First Name:</b>	Melissa	<b>Middle Initial:</b>	N									
Find   View All   First 1 of 2 Last														
<b>Run Date/Time:</b>	10/08/2004 2:26:18PM	<b>Process Instance:</b>	195											
<b>User ID:</b>	PS	<b>Process Name:</b>	ADTRNSRC											
<b>Message Set Number:</b>	14200	<b>Message Number:</b>	143											
<b>Message Severity:</b>	Message													
<b>Message Text:</b>	External Organization is new or an update or is a delete.													
<b>Description:</b>	See the comments below to verify.													
<b>Comments:</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Run Date/Time</b>	The day and time the last process ran for this record.
<b>Process Instance</b>	The process number of the last process run for this record.
<b>User ID</b>	The user ID of the person who ran the last process for this person.
<b>Process Name</b>	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).
<b>Message Set Number and Message Number</b>	The message set number and message number, which come from the message catalog.
<b>Message Severity</b>	The message severity (such as <i>Message</i> or <i>Error</i> ).
<b>Message Text</b>	The actual message on this row of data.
<b>Description</b>	Details about the message in the <b>Message Text</b> area.

<i>Field or Control</i>	<i>Description</i>
<b>Comments</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; Organization Search Process</b>	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.

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**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.

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## Pages Used to Set Up TS130 Search/Match/Post Parameters, Process, and Post the EDI Staging Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search Params	SEARCH_PARMS	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; Search/Match/Post Process &gt; Search Params</b>	Set up your search/match parameters for processing the EDI TS130 transcript staging table.
Post Parameters	ADM_TS130_PST_PARM	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; Search/Match/Post Process &gt; Post Parameters &gt; ADM TS130 Post Parm</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; Search/Match/Post Process &gt; Post Parameters &gt; ADM TS130 Post Parm 2</b>	Set up your address type for the search/match process.

### Setting Up Search/Match Parameters

Access the Search Params page (**Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Search Params**).

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.

**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

<i>Field or Control</i>	<i>Description</i>
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.



<b>Field or Control</b>	<b>Description</b>
<b>Order Nbr</b> (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.
<b>One Match</b> and <b>Multiple Matches</b>	<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 shows the 'ADM TS130 Post Parm' page with the following elements:

- Run Control ID:** ED
- Navigation:** [Report Manager](#), [Process Monitor](#), and a **Run** button.
- Execution Option:** Radio buttons for  Search, Match and Post,  Post Only, and  Search and Match Only.
- Post Processing Parameters:**
  - Process Single Record
  - Data Source:** School (dropdown)
  - Academic Institution:** PSUNV (text input with search icon) PeopleSoft University
  - Grading Scheme:** (text input with search icon)
- Summary Type from External Career:** Find | View All | First | 1 of 1 | Last
- \*External Career:** (dropdown)
- \*Summary Type:** (text input with search icon) and +/- buttons.

## Execution Option

<b>Field or Control</b>	<b>Description</b>
<b>Search, Match and Post</b>	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.
<b>Post Only</b>	Select this option if you only want to post the external data to your database.
<b>Search and Match Only</b>	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

<b>Field or Control</b>	<b>Description</b>
<b>Process Single Record</b>	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.
<b>Data Source</b>	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.
<b>Academic Institution</b>	Enter the academic institution to post with the academic summary and course data.
<b>Grading Scheme</b>	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>
<b>External Career and Summary Type</b>	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.

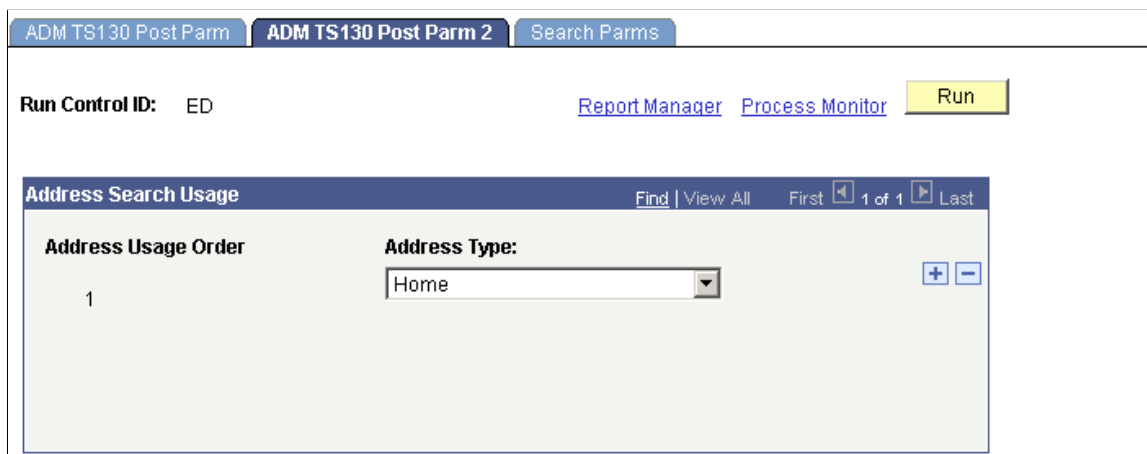
Click the **Run** button to run the EDI TS130 Transcript Srch/Post process at user-defined intervals.

**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>
<b>Address Usage Order</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS130 &gt; Purge Process</b>	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 <b>Post</b> 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 <b>Post</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>All Marked Suspense Rows</b>	Select this option to purge all the records in your staging table that are marked <i>Purge</i> in the <b>Post</b> field of the Process Options and Org Process Options pages.
<b>Rows Loaded before or on</b>	<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 <b>Post</b> field of the Process Options and Org Process Options pages.</p> <p>Use the <b>Dt Loaded</b> (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 <b>Rows Loaded before or on</b> 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>
<b>Rows Posted before or on</b>	<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 <b>Post</b> field of the Process Options and Org Process Options pages and that were posted on or before the specified date.</p> <p>Use the <b>Dt Posted</b> (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 <b>Rows Posted before or on</b> 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

<b>Field or Control</b>	<b>Description</b>
<b>Retain Associated Messages</b>	Select this option if you do <i>not</i> want to purge messages associated with the files that you are purging.
<b>Remove Associated Messages</b>	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.

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## 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	<b>Student Admissions &gt; Application/Transcript Loads &gt; EDI All Message Purge</b>	Purge all EDI messages. You can run a process to purge all EDI messages in your staging files.

# Performing EDI TS189 Application Transactions

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## 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.

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**Note:** Ensure that your system is set up to correctly populate ethnicity information during the TS189 posting process.

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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](#)

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## 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**

Page Name	Definition Name	Navigation	Usage
TS189 IPEDS Ethnicity Mapping	SAD_T189_ETHNICITY	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; TS189 IPEDS Ethnicity Mapping</b>	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 <span style="font-size: x-small;">◀</span> 1-5 of 5 <span style="font-size: x-small;">▶</span> Last					
	IPEDS Race/Ethnicity	Ethnic Group		Description	
1	<input type="text" value="T"/>	AMIND		American Indian/Alaska Native	+ -
2	<input type="text" value="U"/>	ASIAN		Asian	+ -
3	<input type="text" value="Q"/>	BLACK		Black/African American	+ -
4	<input type="text" value="R"/>	HISPA		Hispanic/Latino	+ -
5	<input type="text" value="V"/>	PACIF		Native Hawaiian/Other Pacific Islander	+ -

The fields on this page map inbound data to the Ethnicity page in PeopleSoft Campus Community.

<i>Field or Control</i>	<i>Description</i>
<b>Regulatory Region</b>	The IPEDS standards apply only to the U.S. region.
<b>IPEDS Race/Ethnicity</b>	Enter an ethnicity code. These codes are mandated by the AACRAO SPEEDE committee's recommendation for handling IPEDS requirements.
<b>Ethnic Group</b>	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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS189 Load Parm	ADM_TS189_LOD_PARM	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; Load Application Process &gt; EDI TS189 Load Parm</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Regulatory Region</b>	<p>The system uses the value entered here to populate ethnic group fields during TS189 staging.</p> <hr/> <p><b>Important!</b> Ensure that the ethnic groups defined on the Conversion Data Profile page match those defined for the regulatory region entered here.</p> <hr/>
<b>Male, Female, and Unknown</b>	<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.

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**Note:** You can view the data in the TS189 Staging pages at this time.

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## 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.

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**Note:** Be careful when editing the data in your staging files before posting so that you do not inadvertently create duplicate records.

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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.

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**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.

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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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Process Options</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Org Process Options (organization process options)	ADM_TS189_ORG_OPT	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Org Process Options</b>	Review or edit the process options for external organization records in your TS189 staging table.
Bio/Demo (biographic/ demographic)	ADM_TS189_BIODEMO1	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Bio/Demo</b>	Review and edit the biographical and demographic data loaded through the TS189 load application process.
Bio/Demo 2 (biographic/ demographic 2)	ADM_TS189_BIODEMO2	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Bio/Demo 2</b>	Review and edit the biographical and demographic data loaded through the TS189 load application process.
Names	ADM_TS189_NAM	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Names</b>	View name component information for the application loaded through the TS189 load application process.
Address	ADM_TS189_ADR	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Address</b>	View additional address information loaded through the TS189 load application process.
Organization Detail	ADM_TS189_ADR_SEC	Click the <b>Organization Detail</b> link on the Address page.	View actual address information.
Communications	ADM_TS189_COM	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Communications</b>	View details about TS189 communication data loaded through the TS189 load application process.
Languages	ADM_TS189_LANG	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Languages</b>	View information about an applicant's language use and proficiency loaded through the TS189 load application process.
Recommenders	ADM_TS189_REC	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Recommenders</b>	View information about individuals who recommended the applicant.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Address	ADM_TS189_REC_SEC	Click the <b>Address</b> link on the Recommenders page.	View address information for a recommender.
Residences	ADM_TS189_RES	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Residences</b>	View residence data for the applicant and other related people.
Test Scores	ADM_TS189_TESTS	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Test Scores</b>	Review or edit test score data loaded through the TS189 load application process.
Ref Nmbrs (reference numbers)	ADM_TS189_REF	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Ref Nmbrs</b>	View reference number information loaded through the TS189 load application process.
App Degree (application degree)	ADM_TS189_DEG	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; App Degree</b>	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 <b>Application Data</b> link on the Application Degree page.	View details about an applicant's academic background.
App Entry/Qstns (application entry/questions)	ADM_TS189_SSE	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; App Entry/Qstns</b>	View information about additional application questions and answers, if provided.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Org Data (organization data)	ADM_TS189_ORG_DEMO	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Org Data</b>	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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Sessions</b>	Review or edit transcript session data loaded through the TS189 load application process.
Acad Status (academic status)	ACAD_TS189_SST	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Acad Status</b>	Review or edit high school academic status data loaded through the TS189 load application process.
Cum GPA (cumulative grade point average)	ADM_TS189_SST2	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Cum GPA</b>	Review or edit applicant cumulative GPA data loaded through the TS189 load application process. GPA information is under a session.
Courses	ADM_TS189_CRS	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Courses</b>	Review or edit applicant course data loaded through the TS189 load application process. Course information is under a session.
Employment	ADM_TS189_EMPLOY	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Employment</b>	Review or edit applicant employment data loaded through the TS189 load application process. Employment information is under a session

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Immunizations	ADM_TS189_IMMUNIZ	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Immunizations</b>	Review or edit applicant immunizations data loaded through the TS189 load application process.
Religion	ADM_TS189_RELIGION	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Religion</b>	Review or edit applicant religion data loaded through the TS189 load application process.
Activities	ADM_TS189_ACTIVITY	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Activities</b>	Review or edit applicant activities data loaded through the TS189 load application process.
Messages	ADM_TS189_MSGS	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; TS189 Staging &gt; Messages</b>	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		<b>Bio/Demo</b>		Bio/Demo 2		Names		Address	
<b>Trans ID:</b>	ADM_TRNS_TS189	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound						
<b>Cntrl Num:</b>	992040991	<b>Dt Loaded:</b>	09/18/2009								
<b>Last Name:</b>	Shoeman	<b>First Name:</b>	Paulie	<b>Middle Name:</b>	ALBERT						
<b>Bio/Demo Data</b> <span style="float:right">Find   View All First 1 of 3 Last</span>											
<b>Relationship Nbr:</b>	1	<b>'Relation:</b>	Self								
<b>Last Name:</b>	Shoeman										
<b>First Name:</b>	Paulie			<b>Middle Name:</b>	ALBERT						
<b>ID:</b>											
<b>Ref Nbr Qual:</b>	SSN	<b>Ref Nbr:</b>	111111111								
<b>SSN:</b>	XXX-XX-XXXX			<b>Date of Birth:</b>	02/02/1959						
<b>Name Prefix:</b>	Mr	<input checked="" type="checkbox"/>	<b>Age 18 or Older</b>	<b>Age:</b>							
<b>'Gender:</b>	Male	<b>'Marital Status:</b>	Single								
<b>'Regulatory Region:</b>	United States	<b>Hi Educ Lv:</b>	Not Indic								
<b>Ethnic Group:</b>	Afr Amer										
<b>IPEDS Ethnicity and Race Data</b>											
<b>IPEDS Ethnicity Response:</b>	R	<b>Ethnic Group:</b>	HISPA	Hispanic/Latino							
<b>IPEDS Race Response 1:</b>	Q	<b>Ethnic Group:</b>	BLACK	Black/African American							
<b>IPEDS Race Response 2:</b>	S	<b>Ethnic Group:</b>	WHITE	White							
<b>IPEDS Race Response 3:</b>	T	<b>Ethnic Group:</b>	AMIND	American Indian/Alaska Native							
<b>IPEDS Race Response 4:</b>	U	<b>Ethnic Group:</b>	ASIAN	Asian							
<b>IPEDS Race Response 5:</b>	V	<b>Ethnic Group:</b>	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			
<b>Trans ID:</b>	ADM_TRNS_TS189	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound										
<b>Cntrl Num:</b>	992040991	<b>Dt Loaded:</b>	10/01/2004												
<b>Last Name:</b>	Shoeman	<b>First Name:</b>	Paulie	<b>Middle Initial:</b>	A										
<b>Bio/Demo Data</b>												Find   View All		First 1 of 3 Last	
<b>Relationship Nbr:</b>	1	<b>Relation:</b>	Self												
<b>Last Name:</b>	Shoeman	<b>First Name:</b>	Paulie	<b>MI:</b>	A										
<b>Address Components</b>												Find   View All		First 1 of 2 Last	
<b>*Address Type:</b>	Home			<b>Location ID:</b>											
<b>Dt 1 Qual:</b>		<b>Date 1:</b>													
<b>Dt 2 Qual:</b>		<b>Date 2:</b>													
<a href="#">Organization Detail</a>															

Field or Control	Description
<b>Dt 1 Qual</b> (date 1 qualifier) and <b>Dt 2 Qual</b> (date 2 qualifier)	Identifies what the dates in the <b>Date 1</b> and <b>Date 2</b> fields represent. For example, the dates could represent the start date, the end date, or the expiration date.
<b>Organization Detail</b>	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			
<b>Trans ID:</b>	ADM_TRNS_TS189	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound										
<b>Cntrl Num:</b>	992040991	<b>Dt Loaded:</b>	10/01/2004												
<b>Last Name:</b>	Shoeman	<b>First Name:</b>	Paulie	<b>Middle Initial:</b>	A										
<b>Bio/Demo Data</b>												Find   View All		First 1 of 3 Last	
<b>Relationship Nbr:</b>	1	<b>Relation:</b>	Self												
<b>Last Name:</b>	Shoeman	<b>First Name:</b>	Paulie	<b>MI:</b>	A										
<b>Communications Components</b>												Find   View All		First 1-3 of 3 Last	
<b>Comm Type</b>	<b>Comm Nbr</b>	<b>Dt 1 Qual</b>	<b>Date 1</b>	<b>Dt 2 Qual</b>	<b>Date 2</b>										
Email Work	PSHOEMAN@HOTMA														
Home	2818935050	Start Dt	01/01/1999	Expir Dt	02/15/2000										
Other	2812511341														

<b>Field or Control</b>	<b>Description</b>
<b>DT 1 Qual</b> (date 1 qualifier) and <b>Dt 2 Qual</b> (date 2 qualifier)	Identifies what the dates in the <b>Date 1</b> and <b>Date 2</b> 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 shows a web application interface with several tabs: Communications, Languages (selected), Recommenders, Residences, Test Scores, Ref Nmbrs, and App Degree. 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 is a section for **Bio/Demo Data** with fields for Relationship Nbr (1), Relation (Self), Last Name (Shoeman), First Name (Paulie), and MI (A). The **Language Use** section includes SeqNum (1), ID Code Qual (Lang Cd), ID Code (EN), Description (English In The Home), Lang Use (Home), and Lang Proficny (Englh Prof).

<b>Field or Control</b>	<b>Description</b>
<b>ID Code Qual</b> (ID code qualifier)	Indicates which set of language codes is being sent. Values are <i>Lang Cd</i> (language code) and <i>Mutually</i> .
<b>ID Code</b>	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.

<span>Communications</span> <span>Languages</span> <b><span>Recommenders</span></b> <span>Residences</span> <span>Test Scores</span> <span>Ref Nmbrs</span> <span>App Degree</span>					
<b>Trans ID:</b>	ADM_TRNS_TS189	<b>Queue Inst:</b>	1	<b>In/Out:</b>	Inbound
<b>Cntrl Num:</b>	992040991	<b>Dt Loaded:</b>	10/01/2004		
<b>Last Name:</b>	Shoeman	<b>First Name:</b>	Paulie	<b>Middle Initial:</b>	A
<b>Recommender Information</b> <span style="float:right">Find   View All First 1 of 3 Last</span>					
<b>*SeqNum:</b>	<input type="text" value="1"/>	<b>Rcmd Type:</b>	<input type="text" value="Employer"/>		
<b>Name:</b>	<input type="text" value="Joseph Stoudamire"/>		<b>Dt Record:</b>	<input type="text" value="06/15/1999"/>	<a href="#">Address</a>
<b>Title:</b>	<input type="text" value="Manager"/>				
<b>Recommendation Type:</b>	<input type="text" value="Manager"/>				
<b>Length Known Quant Qualifier:</b>	<input type="text" value="DY"/>	<b>Length Known:</b>	<input type="text"/>		
<b>Comm Qual 1:</b>	<input type="text" value="AP"/>	<b>Communication Number 1:</b>	<input type="text"/>		
<b>Comm Qual 2:</b>	<input type="text"/>	<b>Communication Number 2:</b>	<input type="text"/>		
<b>Business Name:</b>	<input type="text"/>		<b>ID Code:</b>	<input type="text"/>	

<b>Field or Control</b>	<b>Description</b>
<b>SeqNum</b> (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.
<b>Rcmd Type</b> (recommendation type)	The recommendation type that the system posts to the General Materials component.
<b>Dt Record</b> (date record)	The date of the recommendation.
<b>Recommendation Type</b>	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.
<b>Length Known Quant Qualifier</b> (length known quantity qualifier)	Codes that identify the format of the <b>Length Known</b> field. Values are <i>DY</i> (days), <i>MN</i> (months), and <i>YY</i> (years).
<b>Length Known</b>	The amount of time the recommender has known the applicant. The code in the <b>Length Known Quant Qual</b> field defines the format of the number in this field. For example, if <b>Length Known</b> contains the value 78 and the <b>Length Known Quant Qual</b> field contains <i>DY</i> , then the recommender has known the applicant for 78 days.
<b>Comm Qual 1</b> and <b>Comm Qual 2</b> (communication qualifier 1 and communication qualifier 2)	Codes identifying the type of communication number that appears in the <b>Communication Number 1</b> and <b>Communication Number 2</b> fields. Values are:

<b>Code</b>	<b>Name</b>
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

<b>Field or Control</b>	<b>Description</b>
<b>Communication Number 1 and Communication Number 2</b>	The complete communication number, including country or area code (when applicable).
<b>ID Code</b>	Identification of an organizational entity.
<b>Address</b>	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.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for Communications, Languages, Recommenders, Residences (selected), Test Scores, Ref Nmbrs, and App Degree. Below the navigation bar, there is a header section with 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 the header is a search bar with "Find | View All" and a pagination indicator "1 of 1". The main form area contains the following fields and controls:

- Industry Code:** Pur Prprty (dropdown)
- Relation Code:** Father (dropdown)
- Location Qual:** (dropdown)
- Location ID:** (text input)
- Dt 1 Qual:** Start Dt (dropdown)
- Date 1:** 06/01/1997 (calendar icon)
- Quantity Qual:** Months (dropdown)
- Quantity:** 24 (text input)
- Country:** USA (dropdown) United States
- State:** TX (dropdown) Texas
- Postal Code:** (text input)

Field or Control	Description
<b>Industry Code</b>	Indicates a particular criteria or test for determining residency.
<b>Relation Code</b>	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).
<b>Location Qual</b> (location qualifier)	Code identifying the type of location.
<b>Location ID</b>	Code identifying a specific location.
<b>Dt 1 Qual</b> (date 1 qualifier)	Identifies what the date in the <b>Date 1</b> field represents. For example, the date could represent the start date, the end date, or the expiration date.
<b>Date 1</b>	The date that the <b>Dt 1 Qual</b> field identifies.
<b>Quantity Qual</b> (quantity qualifier)	Identifies what the value in the <b>Quantity</b> 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>
<b>Quantity</b>	The days, weeks, months, or years—as specified in the <b>Quantity Qual</b> 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.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for Communications, Languages, Recommenders, Residences, Test Scores, Ref Nmbrs (selected), and App Degree. Below the navigation bar, there is a header section with 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 is a search bar with 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. The main form area contains several fields: Ref ID Qual (dropdown menu set to 'SSN'), \*Ref ID (text input with 'XXXXXXXX'), Description (text input with 'STUDENT REPORTED SSN'), Location Qual (dropdown menu set to '(Invalid Valu...)'), Location ID (text input with 'Regis'), Dt 1 Qual (dropdown menu), Date 1 (text input with a calendar icon), Dt 2 Qual (dropdown menu), Date 2 (text input with a calendar icon), City (text input with 'Hollywood'), State (dropdown menu with 'CA'), Postal Code (text input), Country (dropdown menu with 'USA'), Entity ID (dropdown menu set to 'Postsecd'), and Name (text input with 'Charles Tupper').

<i>Field or Control</i>	<i>Description</i>
<b>Ref ID Qual</b> (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.
<b>Ref ID</b> (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.
<b>Location Qualifier</b>	A code identifying the type of location.
<b>Location ID</b>	A code identifying a specific location.
<b>Dt 1 Qual</b> (date 1 qualifier) and <b>Dt 2 Qual</b> (date 2 qualifier)	Identifies what the dates in the <b>Date 1</b> and <b>Date 2</b> fields represent. For example, the dates could represent the start date, the end date, or the expiration date.
<b>Entity ID</b>	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.

The screenshot shows a web application interface with several tabs: Communications, Languages, Recommenders, Residences, Test Scores, Ref Nmbrs, and App Degree. The App Degree tab is active. The page 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 three sections, each with a search bar and navigation controls (Find | View All, First, 1 of 1, Last):

- SSE Nbr:** 1, **Entry Date:** 01/01/2000,  Application Error
- Degree Nbr:** 1, **Degree Date:** [text box], **Degree:** BA, **Description:** Bachelor of Business Administr, **Honors Category:** None, **Degree Status:** [dropdown], **External Career:** Undergrad
- Field of Study**
  - SeqNum:** 1, **FOS Level:** Major, **ID Code Qual:** CIP
  - Field of Study 1:** 50.07.01,  Application Error, [Application Data](#)
  - Descr1:** Marketing - Pre Bus

Field or Control	Description
<b>ID Code Qual</b> (ID code qualifier)	Identifies what the field of study represents. <i>Mutually</i> means that the value in the <b>Field of Study 1</b> field is mutually defined.
<b>Application Data</b>	Click this link to view additional application data. The Application Data page appears.  <b>Note:</b> Admissions application records use the value of the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

**Note:** You can view the transcript data posted for a person through the Education component or through the Education Summary inquiry component.

## Reviewing TS189 Staging Application Entry/Questions

Access the App Entry/Qstns (application entry/questions) page (**Student Admissions > Application/ Transcript Loads > TS189 > TS189 Staging > App Entry/Qstns**).



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
<b>Application Entry</b> Find   View All First 1 of 1 Last															
SSE Nbr:	1	Priority:	<input type="text"/>	<input type="checkbox"/> Application Error											
Entry Date:	01/01/2000	Exit Date:	<input type="text"/>												
Status Reasn Cd:	<input type="text"/>														
<b>Application Questions</b> 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								
Descr 1:	MINI OR SHORT TERM														
Descr 2:	<input type="text"/>														

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.

<b>Field or Control</b>	<b>Description</b>
<b>Descr 2</b> (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 shows a web interface with several tabs: Ref Nmbrs, App Degree, App Entry/Qstns, Org Data, Sessions, Acad Status, **Cum GPA**, and Courses. 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 nested table-like structures for course data:

- Level 1:** SeqNum: 1, Descr: Cottonwood High School. Includes navigation: Find | View All, First, 1 of 4, Last.
- Level 2 (Expanded):**
  - Unit Type:** Semester (dropdown), **Course Level:** Senior (dropdown)
  - Total Units Attempted:** 30, **Total Completed Units:** 30
  - Acd Hrs Attmptd:** 30, **Quality Points:** (empty field)
  - Excessive GPA Flag:** , **External GPA:** 3.5
  - Sum Data Source:**  Cumulative

<b>Field or Control</b>	<b>Description</b>
<b>Acd Hrs Attmptd</b> (academic hours attempted)	The number of academic hours the person attempted.
<b>Quality Points</b>	The quality points used to compute the person's GPA.
<b>Excessive GPA Flag</b>	Indicates that an A+ grade has a value higher than the highest possible GPA.
<b>Sum Data Source</b> (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).
<b>Cum Summary</b> (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 a web application interface with a navigation bar at the top containing tabs: Acad Status, Cum GPA, Courses, Employment (selected), Immunizations, Religion, Activities, and Messages. Below the navigation bar, the following information is displayed:

- 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 information are two expandable sections:

- Employer:** Contains fields for SeqNum, Employer Name (Steveston Fishing Co.), Description (Seafood Importers), Emp Code (dropdown menu), and Emp Loc Qual (dropdown menu). A link labeled "Address" is also present.
- Position:** Contains fields for Description (Dock Worker), Date 1 (01/01/1994), Date 2 (12/31/1999), Format (CM), and Type (Start Dt for Date 1, (Invalid Valu for Date 2).

### The Employer

Field or Control	Description
<b>Emp Code</b> (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> .
<b>Emp Loc Qual</b> (employer location qualifier)	Defines the address type: for example, home address, current address, local address.

### Position

Field or Control	Description
<b>Date 1</b> and <b>Date 2</b>	The dates that the action in the <b>Type</b> field occurred. In the example in the preceding page shot, the start date of the position was January 1, 2000.
<b>Format</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Type</b>	Specifies whether the date represents the starting date or the ending date.
<b>Address</b>	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.

The screenshot shows a web application interface with several tabs: Acad Status, Cum GPA, Courses, Employment, Immunizations (selected), Religion, Activities, and Messages. Below the tabs, student information is displayed: 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 is a section titled 'Immunizations' with a search bar and navigation controls (Find, View All, First, 1 of 1, Last). The immunization details for sequence number 1 are shown: Immunization Date(s): (empty text box), Immunization Code: EbolaCC04/06/2000, Immunization Status Code: 9th Innocu (dropdown), Immunization Type Code: Cntry Rec (dropdown), Identification Code Qual: Imm Inj Cd (dropdown), and Date/Time Period Qualifier: (empty dropdown).

**Note:** Immunization data does not post to the PeopleSoft Immunization table.

<b>Field or Control</b>	<b>Description</b>
<b>Immunization Date(s)</b>	The date or dates that the immunization occurred.
<b>Immunization Code</b>	The type of immunization a person received. The following table contains possible codes defined by the Postsecondary Electronic Standards Council. Some possible codes are:

<b>Immunization Code</b>	<b>Description</b>
V03.2	Vaccine for Tuberculosis

<b>Immunization Code</b>	<b>Description</b>
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.

<b>Field or Control</b>	<b>Description</b>
<b>Immunization Status Code</b>	Indicates the status of an immunization conducted on a person. Possible codes are:

<b>Code</b>	<b>Name</b>
1	First Inoculation
2	Second Inoculation
3	Third Inoculation
4	Fourth Inoculation

<b>Code</b>	<b>Name</b>
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.

<b>Field or Control</b>	<b>Description</b>
<b>Immunization Type Code</b>	Indicates the title or contents of a document, report, or supporting item. Some possible codes are:

<b>Code</b>	<b>Description</b>
CQ	County Record
HR	Health Clinic Records
IR	State School Immunization Records
MG	Migrant Student Records Transfer System (MSRTS) Record
PY	Physician's Report

<b>Code</b>	<b>Description</b>
ZZ	Mutually Defined

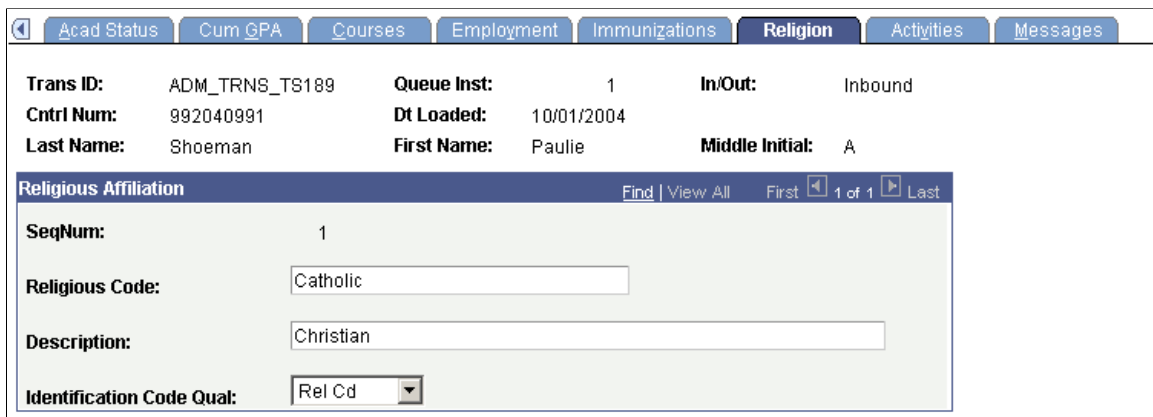
This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council website.

<b>Field or Control</b>	<b>Description</b>
<b>Identification Code Qual</b> (identification code qualifier)	Identifies a specific industry code list, such as <i>AAW</i> (Immunization Injection Code).
<b>Date/Time Period Qualifier</b>	Defines the units in which the <b>Immunization Date(s)</b> field is defined. For example, if the <b>Date/Time Period Qualifier</b> 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.



<b>Field or Control</b>	<b>Description</b>
<b>Identification Code Qual</b>	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.

<span>Acad Status</span> <span>Cum GPA</span> <span>Courses</span> <span>Employment</span> <span>Immunizations</span> <span>Religion</span> <b>Activities</b> <span>Messages</span>			
<b>Trans ID:</b>	ADM_TRNS_TS189	<b>Queue Inst:</b>	1
<b>Cntrl Num:</b>	992040991	<b>Dt Loaded:</b>	10/01/2004
<b>Last Name:</b>	Shoeman	<b>First Name:</b>	Paulie
		<b>Middle Initial:</b>	A
<b>Activities</b> <span>Find   View All</span> <span>First</span> <span>1 of 2</span> <span>Last</span>			
<b>Qualifier Code:</b>	Award Cd		
<b>Activity/Award Code:</b>	AWARD		
<b>Description 1:</b>	Hobie Meyer Athletic Award		
<b>Description 2:</b>	Athletic Award		
<b>Time In Activity:</b>	5		
<b>Activity Unit:</b>	Years		

<i>Field or Control</i>	<i>Description</i>
<b>Qualifier Code</b>	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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS189 Org Search (EDI TS189 organization search)	ADM_TS189_ORG_PARM	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; Organization Search Process</b>	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.

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## 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.

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**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.

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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	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; Search/Match/Post Process &gt; Post Parameters</b>	Post TS189 application data. You can post a single record or all records in the staging table.
Post Parameters 2	ADM_TS189_PST_PRM2	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; Search/Match/Post Process &gt; Post Parameters 2</b>	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.

The screenshot shows the 'Post Parameters' page with three tabs: 'Post Parameters', 'Post Parameters 2', and 'Search/Match Parameters'. The 'Run Control ID' is '11Sept2009run'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The 'Search/Match/Post Exec Options' section has three radio buttons: 'Search, Match and Post' (selected), 'Post Only', and 'Search and Match Only'. The 'TS189 Post Processing Parm' section has a checkbox for 'Process Single Record' and a 'Data Source' dropdown menu set to 'School'. The 'Update IPEDS Ethnicity Flag' section has two radio buttons: 'For All Person Records Posted' and 'For New Person Records Added' (selected).

### Search/Match/Post Exec Options

<i>Field or Control</i>	<i>Description</i>
<b>Search, Match, and Post</b>	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.
<b>Post Only</b>	Select this option if you only want to post the external data to your database.

<b>Field or Control</b>	<b>Description</b>
<b>Search and Match Only</b>	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 Parm

<b>Field or Control</b>	<b>Description</b>
<b>Process Single Record</b>	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.
<b>Data Source</b>	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

<b>Field or Control</b>	<b>Description</b>
<b>For New Person Records Added</b>	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.
<b>For All Person Records Posted</b>	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:

**Summary Type from External Career** Find | View All First 1 of 1 Last

\*External Career:  \*Summary Type:   High School Overall

**Recommendation Material Group and Type from Academic Career** Find | View All First 1 of 1 Last

\*Institution:   \*Academic Career:  \*Material Group:   UG Prtfls \*Matl Type:   Portfolio

<i>Field or Control</i>	<i>Description</i>
<b>Contact Type</b>	Select the contact type to enable the posting of new organization and organization contact information that is loaded with the TS189 file.
<b>External Career and Summary Type</b>	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.
<b>Institution, Academic Career, Material Group, and Matl Type (material type)</b>	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 Parm (EDI TS189 purge parameters)	ADM_TS189_PUR_PARM	<b>Student Admissions &gt; Application/Transcript Loads &gt; TS189 &gt; Purge Process</b>	Purge records and messages, if applicable, from the TS189 staging table.

## Purging the EDI TS189 Staging Table and Messages

Access the EDI TS189 Purge Parm page (**Student Admissions > Application/Transcript Loads > TS189 > Purge Process**).

### TS189 Purge Processing Parm

<i>Field or Control</i>	<i>Description</i>
<b>All Suspense Rows</b>	Select this option if you want to purge all records in your staging table, regardless of what is in the <b>Post</b> field on the Process Options and Org Process Options pages.
<b>Marked Test Suspense Rows</b>	Select this option if you want to purge only those records in your staging table marked <i>Purge</i> in the <b>Post</b> field on the Process Options and Org Process Options pages.

### TS189 Msg Purge Process Parm

<i>Field or Control</i>	<i>Description</i>
<b>Retain Associated Messages</b>	Select this option if you do not want to purge messages associated with the files that you are purging.
<b>Remove Associated Messages</b>	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

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## Understanding External Test Score Data Processing

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**Important!** Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. 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.

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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, GMASS, 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, GMASS, 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)

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## Loading External Test Score Files

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**Important!** Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. 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.

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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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Load</b></li> <li>• or <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Load</b></li> </ul>	<p>Designate the directory location of the test scores that you are loading and enter the load parameters for that test.</p> <hr/> <p><b>Note:</b> 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

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:	<input type="text" value="BC"/>	Biochem, Cell, Molec Biology
Biochemistry Subscore:	<input type="text" value="BCS"/>	Biochemistry Subscore
Cell Biology Subscore:	<input type="text" value="CBS"/>	Cell Biology Subscore
Molecular Bio & Genetics Sub:	<input type="text" value="MBGS"/>	Molecular Bio & Genetics Subsc
Biology:	<input type="text" value="BY"/>	Biology
Cellular & Molecular Bio Sub:	<input type="text" value="CMBS"/>	Cellular & Molecular Bio Subsc
Organismal Biology Subscore:	<input type="text" value="OBS"/>	Organismal Biology Subscore
Ecology & Evolution Subscore:	<input type="text" value="EES"/>	Ecology & Evolution Subscore
Chemistry:	<input type="text" value="CH"/>	Chemistry
Computer Science:	<input type="text" value="CS"/>	Computer Science
Literature in English:	<input type="text" value="EL"/>	Literature in English
Mathematics:	<input type="text" value="MA"/>	Mathematics (Subject)
Physics:	<input type="text" value="PH"/>	Physics
Psychology:	<input type="text" value="PY"/>	Psychology
Experimental Psychology Sub:	<input type="text" value="EPS"/>	Experimental Psych Subscore
Social Psychology Subscore:	<input type="text" value="SPS"/>	Social Psych Subscore

### Test ID

<i>Field or Control</i>	<i>Description</i>
<b>Test ID</b>	Select the test that you want to load. Define test ID values on the Test Tables page. Once the <b>Test ID</b> 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>
<b>Test Score Input File Name</b>	<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 <b>AADSAS</b> 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 <b>AADSAS (Courses Completed)</b> field, enter the name of the directory and file where the list of completed courses resides.</p> <p>In the <b>AADSAS (Courses Planned)</b> field, enter the name of the directory and file where the planned or in-progress list of courses resides.</p> <p>In the <b>AADSAS (College)</b> field, enter the name of the directory and file where the list of attended colleges resides.</p> <p>In the <b>AADSAS (GPA)</b> field, enter the name of the directory and file where the GPA data resides.</p> <p>In the <b>AADSAS (GPA per College)</b> field, enter the name of the directory and file where the GPA summary for each college resides.</p> <p>In the <b>AADSAS (GPA per Session)</b> 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>
<b>Male, Female, and Unknown</b>	<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](#)

<b>Field or Control</b>	<b>Description</b>
<b>Score and Percentile</b>	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

<b>Field or Control</b>	<b>Description</b>
<b>Test Date, Test Day, Test Month, Degree Day, Graduation Day, and Graduation Month</b>	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 <b>Degree Date</b> and <b>Graduation Date</b> information to the prospect record if you select the <b>Create Prospect</b> field on the Search/Match/Post Test Scores page. Values for <b>Test Day</b> , <b>Degree Day</b> , and <b>Graduation Day</b> are 1 through 28. Values for <b>Test Month</b> and <b>Graduation Month</b> are 1 through 12.
<b>LSAT/LSDAS Test Score</b>	For LSAT/LSDAS only: Select <i>LSAT</i> or <i>LSDAS</i> to indicate the type of file that you are loading.

<b>Field or Control</b>	<b>Description</b>
<b>Score/Test Type</b>	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.
<b>SAT I Search, PSAT/NMSQT Search, or AP Search</b>	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.
<b>School Tape Type</b>	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.
<b>Initial or Full</b>	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.

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## Correcting and Editing Data in the Suspense Record

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**Important!** Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. 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.

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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.

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**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.

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## 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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Test Score Suspense Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Test Score Suspense Data</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Personal Information</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Personal Information</b></li> </ul>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Tests</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Tests</b></li> </ul>	Review or edit test data in the suspense record. Some of the information on this page is required (such as test date and test components). If this information is missing in the external test data load, you must enter valid values here before posting the record. Refer to the data layouts from the testing agency to determine the fields that will appear. Each test has a Tests page, with the exception of SAT. The data varies depending on the test ID.
Academics	SAD_ACT_SUS_SPS	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Academics</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Academics</b></li> </ul>	For ACT only: Review or edit academic data in the suspense record. Refer to the data layouts from ACT to determine the fields that will appear.  Note that the same changes have been made to the corresponding candidate data page (SAD_ACT_CD_ACAD). ]
Activities	SAD_ACT_SUS_COL	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Activities</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Activities</b></li> </ul>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Interests	SAD_ACT_SUS_INT	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Interests</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Interests</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Education</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Education</b></li> </ul>	For ADA only: Review and edit education data in the suspense record. Refer to the data layouts from Associated American Dental Schools Application Service (AADSAS) to determine the fields that will appear.
Courses	SAD_ADA_SUS_CRD	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Courses</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Courses</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Applicant Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Applicant Data</b></li> </ul>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Family Information	SAD_ADA_SUS_FAMILY	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Family Information</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Family Information</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Essays</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Essays</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Colleges</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Colleges</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; GPA/Hours</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; GPA/Hours</b></li> </ul>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Schools	SAD_AP_SUS_SCH	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Schools</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Schools</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Awards</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Awards</b></li> </ul>	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_CRG_SUS_ACI	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Additional Information</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Additional Information</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Profile Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Profile Data</b></li> </ul>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Prior Schools	SAD_LAW_SUS_MTR	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Prior Schools</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Prior Schools</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Candidate Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Candidate Data</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Recommendations</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Recommendations</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Academics</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Academics</b></li> </ul>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
SAT I	SAD_SAT_SUS_SATI	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; SAT I</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; SAT I</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; SAT II</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; SAT II</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Student Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; Student Data</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Suspense &gt; School Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Suspense &gt; School Data</b></li> </ul>	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	
<b>Last Name:</b>		<b>Record Number:</b>	100327				
<b>First Name:</b>	Pavel	<b>Date Loaded:</b>	08/13/2004				
<b>Middle Initial:</b>	A						
<b>Test ID:</b>	ACT		ACT Assessment				
Processing Options							
<b>*Edit:</b>	Error	<b>*Search:</b>	Perform	<b>*Post:</b>	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							
<b>Order Number:</b>	0	<b>Matches:</b>	0				
Messages							
Customize   Find   View All   First 1-4 of 6 Last							
Severity	Message Text	Description	Comments	Process Instance	Run Date/Time	Process Name	User ID
1 Message	A blank last name was detected. Verify entry.			204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
2 Message	An invalid birth date was detected. Verify Entry.		An invalid birth date of "31" was detected.	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
3 Message	Record has been loaded.	Record was loaded by the load program.	First Name : Pavel Middle Initial : A Last Name :	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
4 Error	An invalid test date has been detected. Verify Entry.		An invalid Test Date of "1996" was detected.	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS

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
<b>Edit</b>	<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 <b>Error Indicators</b> 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>



<b>Field or Control</b>	<b>Description</b>
<b>Search</b>	<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>
<b>Post</b>	<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 <b>ID</b> field on the page. If the process updated an existing person's record, the process displays the ID that was updated in the <b>ID</b> field on the Bio/Demo page.</p>

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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 <b>ID</b> 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.

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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

<b>Field or Control</b>	<b>Description</b>
<b>Last Name, Test Date, Birth Day, First Name, Graduation Date, High School Graduation Date, and Test Component</b>	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>
<b>Order Number</b>	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 <b>Order Number</b> field. Use this information to decide whether a possible duplicate exists.
<b>Matches</b>	Displays the number of matches that the process found at the order number given.

## Messages

<i>Field or Control</i>	<i>Description</i>
<b>Message Severity</b>	The message severity, such as <i>Message</i> or <i>Error</i> .
<b>Message Text</b>	The message on this row of data.
<b>Description</b>	The detailed message.
<b>Comments</b>	Results or other additional information about the message.
<b>Process Instance</b>	The process number of the process that you ran for this record. Process Scheduler generates this number.
<b>Run Date/Time</b>	The day and time that the process ran for this record.
<b>Process Name</b>	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).
<b>User ID</b>	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:  Record Number: 100135

'First Name:  Date Loaded: 06/09/2010

Middle Initial:

Test ID: ACT      ACT Assessment

**Personal Information**

ID:

Name Prefix:

Birthdate:   ACT Birthdate: 19751101

'Gender:   ACT Gender: M

SSN:  ACT SSN: XXXXXXXXX

Address 1:

City:

State:   Arizona

ACT State: AZ

Postal Code:

Country:   United States

Telephone Number:  ACT Phone Type: 1

Citizenship Status:   ACT Citizenship: 1

Legal Resident of State:

Email Address:

ACT Hispanic or Latino: 2 Ethnicity: 6

**Ethnic Group Selection**

Race Responses			Customize   Find   View All   <input type="button" value="Print"/>   <input type="button" value="Grid"/>
Ethnicity	Ethnic Group	Description	
2	ASIAN <input type="button" value="Q"/>	Asian	+ -
4	PACIF <input type="button" value="Q"/>	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"/>	English Spoken at Home: <input type="text" value="1"/>
Disability: <input type="text" value="1"/>	Vocation Choice: <input type="text" value="453"/>
ROTC: <input type="text" value="2"/>	Expected Highest Educ Level: <input type="text" value="3"/>
Distance From College: <input type="text" value="3"/>	Planned Housing: <input type="text" value="1"/>

**Confidence In**

Vocation:

College Major:

**Planned Academic Load**

Full Time

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.

<b>Field or Control</b>	<b>Description</b>
<b>Record Number</b>	Displays the test record number. This number is automatically populated based on the Installation parameters.
<b>Date Loaded</b>	Displays the date that you loaded this record.
<b>Last Name, First Name, and Middle Initial</b>	Displays the person's last name, first name, and middle initial or middle name, as they appear in the test record. If the <b>Last Name</b> or <b>First Name</b> fields are empty, enter values.
<b>ID</b>	<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 <b>Post</b> field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.</p>
<b>Birthdate</b>	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.
<b>Name Prefix</b>	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.
<b>Gender</b>	The person's gender. The load process converts the person's gender as reported in the test record to the corresponding PeopleSoft gender code.
<b>Ethnic Group</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>SSN</b> (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.
<b>Address 1, Address 2, City, State, Country, and Postal Code</b>	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.
<b>Telephone</b>	Displays the person's telephone number.
<b>Citizenship Status</b>	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

**First Name:** Cliff **Date Loaded:** 06/09/2010

**Middle Initial:** M

**Test ID:** ACT      ACT Assessment

Test Score Data

**Test Date:**        **ACT Test Date:** 199606

**Test ID:**   ACT Assessment

**Test Location:**       **Corrected Score Indicator:**

**Reporting Year:**       **Sum of Scale Scores:**

Standard Test Administration

	Post	Error	Test Component	Score		Percentile	
				Post	ACT	Post	ACT
<b>English:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="ENGL"/> <input type="button" value="Q"/> English	<input type="text" value="19.00"/>	19	<input type="text" value="37"/>	37
<b>Math:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="MATH"/> <input type="button" value="Q"/> Math	<input type="text" value="22.00"/>	22	<input type="text" value="68"/>	68
<b>Reading:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="READ"/> <input type="button" value="Q"/> Reading	<input type="text" value="13.00"/>	13	<input type="text" value="5"/>	05
<b>Science Reason:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="SCIRE"/> <input type="button" value="Q"/> Science Reasoning	<input type="text" value="14.00"/>	14	<input type="text" value="2"/>	02
<b>Composite:</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="COMP"/> <input type="button" value="Q"/> Composite	<input type="text" value="17.00"/>	17	<input type="text" value="15"/>	15
<b>English/Writing:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="EW"/> <input type="button" value="Q"/> Combined English/Writing	<input type="text"/>	--		
<b>Writing:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="WR"/> <input type="button" value="Q"/> Writing	<input type="text"/>	--		

<i>Field or Control</i>	<i>Description</i>
<b>Test Date</b>	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.
<b>Test ID</b>	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.
<b>Post</b>	The load process selects this check box if the score and component are valid. You can post the score for this component.

<b>Field or Control</b>	<b>Description</b>
<b>Error</b>	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 <b>Error</b> check box is cleared and the <b>Post</b> check box is selected.
<b>Test Component</b>	Displays the test components that you selected on the External Test Score Load page for the test ID.
<b>Score and Percentile</b>	Displays the reported score and percentile for each component (if applicable).

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## Performing the Search/Match Process and Posting External Data

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**Important!** Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. 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.

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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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Search/Match/Post/Test Scores</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Search/Match/Post Test Scores</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Search/Match/Post/Test Scores &gt; Search Parameters</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Search/Match/Post Test Scores &gt; Search Parameters</b></li> </ul>	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 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**  Hispanic/Latino

Post Processing Parameters

**Process Single Record**

TREVORC LINDEN

'Data Source:'

'Address Type:'

**Populate Email Address**

Email Type:

Commit Frequency:

 **Create Prospects**

<i>Field or Control</i>	<i>Description</i>
<b>Test ID</b>	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.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>LSAD Test Score</b>	The system does not display the Post To group box if you select this option. You cannot post LSAD test scores to CRM.
<b>LSAT Test Score</b>	The system displays the Post To group box if you select this option. You can post the LSAT test scores to CRM.

## Execution Option

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Search, Match and Post</b>	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.
<b>Post Only</b>	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).
<b>Search and Match Only</b>	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

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Campus Solutions</b>	Select this option if you want to post the suspense data to Campus Solutions.

<b>Field or Control</b>	<b>Description</b>
<b>Enterprise CRM</b>	<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:

<b>Field or Control</b>	<b>Description</b>
<b>Update All Records</b>	<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>
<b>Update If Not Populated</b>	<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:

<b>Field or Control</b>	<b>Description</b>
<b>Hispanic/Latino Populated</b>	<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>
<b>Do Not Update</b>	<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:

<b>Field or Control</b>	<b>Description</b>
<b>For New Person Records Added</b>	<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>
<b>For All Person Records Posted</b>	<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>
<b>Do Not Update</b>	<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:

<b>Field or Control</b>	<b>Description</b>
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

<b>Field or Control</b>	<b>Description</b>
<b>Process Single Record</b>	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.
<b>Data Source</b>	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.
<b>Address Type</b>	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.
<b>Phone Type</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Commit Frequency</b>	<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>
<b>Populate Email Address, Email Type</b>	<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><b>Note:</b> 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.

<b>Field or Control</b>	<b>Description</b>
<b>Academic Program</b>	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.
<b>Assign 3C</b>	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 <b>Event ID</b> field becomes available.  The system clears and disables this check box if you have selected the Enterprise CRM option in the Post To group box. The 3Cs feature is not available in CRM.
<b>Event ID</b>	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 Params page (**Student Admissions > Application/Transcript Loads > TS130 > Search/Match/Post Process > Search Params**).

### No Matches Found

<i>Field or Control</i>	<i>Description</i>
<b>New</b>	<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>
<b>One Match and Multiple Matches</b>	<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](#)

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## Researching Duplicate Records

**Important!** Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. 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.

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## Rerunning the Search/Match/Post Process

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**Important!** Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. 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.

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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. 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

Page Name	Definition Name	Navigation	Usage
External Test Score Purge	SAD_TEST_PURGE	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; External Test Score Purge</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; External Test Score Purge</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Messages Purge</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Messages Purge.</b></li> </ul>	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

**Message Purge Parameter**

Retain Associated Messages

Remove Associated Messages

<i>Field or Control</i>	<i>Description</i>
<b>Test ID</b>	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.
<b>All Suspense Rows</b>	Select this option to enable the Purge Option for All Rows group box.
<b>Marked Suspense Rows</b>	Select this option to enable the Purge Option for Marked Rows group box.

### Purge Option for All Rows

<i>Field or Control</i>	<i>Description</i>
<b>All Suspense Rows</b>	Select this option to purge all the suspense records.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Rows Loaded before or on</b>	<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 <b>Date Loaded</b> 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 <b>Rows Loaded before or on</b> 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

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>All Marked Suspense Rows</b>	Select this option to purge all the records in your suspense table that are marked <i>Purge</i> in the <b>Post</b> field of the Test Score Suspense Data page.
<b>Rows Loaded before or on</b>	<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 <b>Post</b> 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

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Retain Associated Messages</b>	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
<b>Remove Associated Messages</b>	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

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## Reviewing Test Score Candidate Data

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**Important!** Test score load and other processes and components discussed in this *Processing External Test Scores* documentation are deprecated. 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.

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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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Personal Information</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Personal Information</b></li> </ul>	<p>This page appears for the ACT, ADA, AMCAS, LSAT/ LSDAS, SAT, and SSS.</p> <p>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.</p>
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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Test Score Candidate Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Test Score Candidate Data</b></li> </ul>	<p>This page appears for the AP, CRS, DAT, EOS, GMAT, GRE, GMASS, and TOEFL.</p> <p>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.</p>
Academics	SAD_ACT_CD_ACAD SAD_LAW_CD_SCH	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Academics</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Academics</b></li> </ul>	<p>This page displays for the ACT and LSAT/LSDAS.</p> <p>Access a student's test and academic data as reported by the testing agency. The fields vary depending on the test ID.</p>
Activities	SAD_ACT_CD_ACT	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Activities</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Activities</b></li> </ul>	<p>This page displays for ACT only. Access student profile high school and projected college activity information.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Interests	SAD_ACT_CD_INT	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Interests</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Interests</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Education</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Education</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Applicant Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Applicant Data</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Application</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Application.</b></li> </ul>	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 <b>Post Option</b> field.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Courses	SAD_ADA_CD_CRCS	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Courses</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Courses</b></li> </ul>	This page appears for ADA. Review a student's academic course work and grades as reported by AADSAS.
Family Information	SAD_ADA_CD_FAMILY	<p><b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Family Information</b></p> <p><b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Family Information</b></p>	This page appears for ADA. Review the family information.
Essays	SAD_ADA_CD_ESSAY	<p><b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Essays</b></p> <p><b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Essays</b></p>	This page appears for ADA. Review the personal statement data
Colleges	SAD_AMC_CD_COL	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Colleges</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Colleges</b></li> </ul>	This page appears for AMCAS. Review a student's prior colleges attended as well as previous majors and degrees earned, as provided by AAMC.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
GPA/Hours	SAD_AMC_CD_GPA	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; GPA/Hours</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; GPA/Hours</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Awards</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Awards</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Schools</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Schools</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Test Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Test Data</b></li> </ul>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Additional Data	SAD_CRS_CD	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Additional Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Additional Data.</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Prior Schools</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Prior School.</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Candidate Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Candidate Data</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Recommendations</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Recommendations</b></li> </ul>	This page appears for LSAT/LSDAS. Review letter of recommendation data as provided by LSAC.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Student Data	SAD_SAT_CD_STD SAD_SSS_CD_SDQ	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Student Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; Student Data</b></li> </ul>	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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; School Data</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Candidate Data &gt; School Data</b></li> </ul>	This page appears for SAT. Review college preference information for a student. If the test type is <i>college</i> , you can review the high school information for the student, as provided by ETS. If the test type is <i>secondary</i> , you can review the colleges that the student submitted test scores to, as provided by ETS. The data that appears on the page depends on the test type that you selected during the external test score load process.

## Reviewing Candidate Data Personal Information

Access the Personal Information page (**Student Recruiting > External Test Score Processing > Test Score Candidate Data > Personal Information** or **Student Admissions > External Test Score Processing > Test Score Candidate Data > Personal Information**).

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:  BY 'Personal Data Impacts:

Personal Information

<b>Last Name:</b> <input type="text" value="Fourtnall"/>	<b>Middle Initial:</b> <input type="text" value="A"/>
<b>First Name:</b> <input type="text" value="Leoff"/>	<b>ACT SSN:</b> <input type="text" value="XXXXXXXX"/>
<b>Birthdate:</b> <input type="text" value="19861022"/>	<b>Gender:</b> <input type="text" value="F"/>
<b>Address 1:</b> <input type="text" value="18601 Main St"/>	<b>ACT Citizenship:</b> <input type="text" value="1"/>
<b>City:</b> <input type="text" value="Port Charles"/>	<b>Legal Resident of State:</b> <input type="text" value="1"/>
<b>State:</b> <input type="text" value="NY"/>	
<b>Postal Code:</b> <input type="text" value="85242"/>	<b>Grade Level:</b> <input type="text" value="11"/>
<b>Telephone Number:</b> <input type="text" value="602/987-3031"/>	<b>Phone Type:</b> <input type="text" value="3"/>
<b>HS Code:</b> <input type="text" value="052390"/>	<b>High School Graduation Year:</b> <input type="text" value="2005"/>
<b>Email Address:</b> <input type="text" value="lft890@yahoo.com"/>	
<b>ACT Ethnicity:</b> <input type="text" value="3"/>	<b>ACT Hispanic or Latino:</b> <input type="text" value="2"/>

Ethnic Group Selection

Race Responses
Customize | Find | View All
First 1 of 1 Last

Ethnicity	Ethnic Group	Description
5	WHITE <input type="text" value=""/>	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 1

Address 2

Address 3

Address 4

City

State

Postal Code

Country  Germany

Area Code  Daytime Telephone

Mobile

Other Area Code  Other Phone

FAX

Email Address

---

**Proxy Information**

Proxy Name

Proxy Relationship

Proxy DOB

Proxy Phone

Proxy Email

Personal and academic data posted from the suspense record appears in these fields.

<b>Field or Control</b>	<b>Description</b>
<b>Test ID</b>	Displays the test you entered on the search page. The pages to the component vary based on the test ID.
<b>Test Date</b>	Displays the day the person took the test.
<b>Personal Data Impacts</b>	<p>Indicates whether the process added a new EMPLID to your database or updated the personal data for an existing EMPLID.</p> <p>The system displays one of the following values for this field:</p> <ul style="list-style-type: none"> <li>• <i>Caused Personal Data Creation</i></li> <li>• <i>No Personal Data Impact</i></li> <li>• <i>Caused Personal Data Update</i></li> </ul>



## 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					
<b>Test Information</b> <span style="float: right;">Find   View All   First 1 of 1 Last</span>							
Test Date:	11/05/1999	Personal Data Impacts:	Caused Personal Data Update <input type="button" value="v"/>				
Reporting Year:	<input type="text" value="95"/>	Sum of Scale Scores:	<input type="text" value="099"/>				
Test Location:	<input type="text" value="R"/>						
<b>Academic Information</b>							
GPA:	<input type="text" value="7"/>	Class Rank:	<input type="text" value="1"/>				
Major Plan:	<input type="text" value="410"/>	Class Size:	<input type="text" value="5"/>				
High School Descr:	<input type="text" value="1"/>	High School Prog Type:	<input type="text" value="4"/>				
<b>High School Grades</b>							
English:	<input type="text"/>	Math:	<input type="text"/>				
Social Studies:	<input type="text" value="4.3"/>	Natural Sciences:	<input type="text" value="3.4"/>				
HS Average:	<input type="text" value="3.50"/>						
<b>High School Honors Courses</b>							
English:	<input type="text" value="1"/>	Math:	<input type="text" value="1"/>				
Foreign Language:	<input type="text" value="1"/>	Natural Sciences:	<input type="text" value="1"/>				
Social Studies:	<input type="text" value="1"/>						
<b>Financial Aid</b>							
Apply:	<input type="text" value="1"/>	Work:	<input type="text" value="1"/>				
Parents Income:	<input type="text" value="5"/>	Hours Expect to Work:	<input type="text" value="3"/>				
Father/Guardian 2 Ed Level:	<input type="text" value="1"/>	Mother/Guardian 1 Ed Level:	<input type="text" value="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		<b>Activities</b>		Interests	
Bryce Landolf				0049			
Test ID: ACT		ACT Assessment					
<b>Test Information</b>		Find   View All First 1 of 1 Last					
Test Date: 04/01/2006		*Personal Data Impacts:		Caused Personal Data Creation			
<b>College Expected Extracurricular Activities</b>		Find   View All First 1-8 of 16 Last					
<b>*Activities</b>		<b>Participation</b>					
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"/>				+ -	
<b>High School Activities</b>		Find   View All First 1-8 of 16 Last					
<b>*Activities</b>		<b>Participated</b>					
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		<b>Interests</b>	
Bryce Landolf				0049			
<b>Test ID:</b> ACT		ACT Assessment					
<b>Test Information</b> <span style="float: right;">Find   View All First 1 of 1 Last</span>							
<b>Test Date:</b>	04/01/2006			<b>Personal Data Impacts:</b>	Caused Personal Data Creation		
<b>College Choice Number:</b>	8		<b>College Code Number:</b>	1428			
<b>Interest Inventory</b>							
	<b>Score:</b>			<b>Percentile:</b>			
<b>Science:</b>	71						
<b>Arts:</b>	39						
<b>Social Service:</b>	37						
<b>Business Contact:</b>	43						
<b>Business Operations:</b>	54						
<b>Technical:</b>	60						
<b>Map Regions</b>							
<b>Region 1:</b>	06		<b>Region 2:</b>	07		<b>Region 3:</b>	08
<b>ACT Subscores</b>							
	<b>Enhanced (Scale):</b>	<b>National Norms:</b>		<b>Local Norms:</b>			
<b>Usage/Mechanics</b>	10	55		36			
<b>Rhetorical Skills</b>	09	38		17			
<b>Elementary Algebra</b>	09	39		17			
<b>Algebra/Coordinate Geometry</b>	12	78		59			
<b>Plane Geometry/Trigonometry</b>	12	75		57			
<b>Social Studies/Science</b>	11	59		43			
<b>Arts/Literature</b>	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"/>
Nat'l 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. 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"> <li>• <b>Student Recruiting &gt; External Test Score Processing &gt; Test Score Messages</b></li> <li>• <b>Student Admissions &gt; External Test Score Processing &gt; Test Score Messages</b></li> </ul>	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	<input type="text" value="ACT"/>	Record Number:	<input type="text"/>
Process Instance:	<input type="text"/>	Date Loaded:	<input type="text"/>
Last Name:	<input type="text"/>	First Name:	<input type="text"/>
ID:	<input type="text"/>	<input type="button" value="Search"/>	

Record Number:	100326	Process Instance:	204
ID:		First Name:	
Last Name:	Linden	Date Loaded:	08/13/2004
Run Date/Time:	08/13/2004 3:03:59PM	Process Name:	SAD_TST_LOAD
User ID:	PS	Message Number:	125
Message Set Number:	14200		
Message Severity:	Message		
Message Text:	<input type="text" value="Record has been loaded."/>		
Description:	<input type="text" value="Record was loaded by the load program."/>		
Comments:	<input type="text" value="First Name : Middle Initial : C Last Name : Linden"/>		

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.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Record Number</b>	Select the record number for which you want to search for test score messages.
<b>Process Instance</b>	Select the process instance for which you want to search for test score messages.
<b>Date Loaded</b>	Select the date loaded for which you want to search for test score messages.
<b>Last Name</b>	Select the last name for which you want to search for test score messages.
<b>First Name</b>	Select the first name for which you want to search for test score messages.
<b>ID</b>	Select the ID for which you want to search for test score messages.
<b>Search</b>	Click to find information matching your search criteria.





# (NZL) Processing NCEA Test Scores

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## 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](http://www.nzqa.govt.nz/ncea/index.html)

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Test Component Table</b>	Define test components to attach to test IDs.
Test Tables	SA_TEST_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Test Tables</b>	Define an NCEA test ID and assign test components.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
NCEA Subject Code Map	SAD_NCEA_MAPSB_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Subject Code Map</b>	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.

### Test Component Table

**Test Component:** ACCTG

Find | View All    First ◀ 1 of 1 ▶ Last

<b>*Effective Date:</b>	<input type="text" value="01/01/1900"/>	<input type="button" value="B1"/>	<b>*Status:</b>	<input type="text" value="Active"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<b>*Description:</b>	<input type="text" value="Accounting"/>					
<b>Short Description:</b>	<input type="text" value="Accounting"/>					

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:**  BT    **\*Status:**  + -

**\*Description:**

**Short Description:**

**Testing Agency:**

Find | View All    First ◀ 1-4 of 4 ▶ Last

*Component	*Description	*Short Desc	Min Score	Max Score	Subtest	
ACCTG <small>🔍</small>	<input type="text" value="Accounting"/>	<input type="text" value="Accounting"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>	+ -
BIOLY <small>🔍</small>	<input type="text" value="Biology"/>	<input type="text" value="Biology"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>	+ -
CHEMS <small>🔍</small>	<input type="text" value="Chemistry"/>	<input type="text" value="Chemistry"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>	+ -
CMPST <small>🔍</small>	<input type="text" value="Computing Studies"/>	<input type="text" value="Computing"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>	+ -

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:**  BT    **\*Status:**  + -

**Subject Group Code:**

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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
NCEA Load External Data	SAD_RCTL_NCEA_LD_N	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Load External Data</b>	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	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Suspense &gt; Process Options</b>	View and correct load process results.
Bio/Demo Data	SAD_NCEA_SPBIO_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Suspense &gt; Bio/Demo Data</b>	Review and edit the student's personal information in the suspense record.
Other Bio/Demo Data	SAD_NCEA_SPOTR_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Suspense &gt; Other Bio/Demo Data</b>	Review and edit additional personal information in the suspense record.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Subjects	SAD_NCEA_SPSUB_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Suspense &gt; Subjects</b>	Review and edit the student's loaded subject data.
Standard Result	SAD_NCEA_SPSTD_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Suspense &gt; Standard Result</b>	Review and edit the student's loaded standard result record.
Messages	SAD_NCEA_MSG_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Suspense &gt; Messages</b>	Review message details from the load process.
Search/Match Parameters	SEARCH_PARMS	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Search/Match/Post &gt; Search/Match Parameters</b>	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	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Search/Match/Post &gt; NCEA Post Parameters</b>	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	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Test Results &gt; NCEA Test Results</b>	View a student's posted NCEA test data.
Additional Test Score Detail	SAD_NCEA_TSTSC_SEC	Click the <b>Details</b> button on the NCEA Test Result page.	Review additional information about a test component.
NCEA Purge Suspense File	SAD_RCTL_NCEAPRG_N	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Purge Suspense File</b>	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:**   PeopleSoft Australia Uni

**\*NCEA Year:**

**\*NCEA File Number:**  ▼

**NCEA File Path 1:**

**NCEA File Path 2:**

**NCEA File Path 3:**

**NCEA File Path 4:**

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.

<b>Process Options</b>				Bio/Demo Data	Other Bio/Demo Data	Subjects	Standard Result	Messages
<b>NSN:</b>	99132223	<b>NCEA Year:</b>	2004	<b>NCEA File Number:</b>	2			
<b>Last Name:</b>	Nceacandidate	<b>First Name:</b>	Kiwi					
<b>Name 2:</b>	Student	<b>Name 3:</b>						
<b>Processing Options</b>								
<b>Edit:</b>	Complete	<b>Search:</b>	Complete	<b>Post:</b>	Purge			
<b>Error Indicators</b>								
<input type="checkbox"/> Last Name			<input type="checkbox"/> First Name					
<input type="checkbox"/> Birthdate								
<b>Search / Match Results</b>								
<b>Order Nbr:</b>	30	<b>Matches:</b>	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

<i>Field or Control</i>	<i>Description</i>
<b>Edit</b>	<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"> <li><i>Complete:</i> The load process loaded the data without a problem. This record is ready to be posted.</li> <li><i>Error:</i> The load process encountered problems when loading the data.</li> </ul> <p>The system indicates the values that you must correct in the <b>Error Indicators</b> 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"> <li><i>Perform:</i> You set this value manually.</li> </ul> <p>This is for informational purposes only.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Search</b>	<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"> <li>• <i>Complete</i>: The search/match process completed successfully.</li> <li>• <i>Error</i>: The search/match process encountered problems. Refer to the log file for information regarding the error.</li> <li>• <i>Perform</i>: The search/match process will process this record the next time you run the process.</li> </ul>
<b>Post</b>	<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>

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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.

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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	<p>This record is in the suspense file and is waiting to be processed by the search/match/post process.</p>	<p>Set by the system during the load external data process.</p>

**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

<b>Field or Control</b>	<b>Description</b>
<b>Last Name, First Name, and Birthdate</b>	<p>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 <b>Edit</b> field.</p>

### Search/Match Results

<i>Field or Control</i>	<i>Description</i>
<b>Order Nbr</b> (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 <b>Order Nbr</b> field. Use this information to decide whether or not a possible duplicate exists.
<b>Matches</b>	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.

<a href="#">Process Options</a>	<b><a href="#">Bio/Demo Data</a></b>	<a href="#">Other Bio/Demo Data</a>	<a href="#">Subjects</a>	<a href="#">Standard Result</a>	<a href="#">Messages</a>
<b>NSN:</b>	99132223	<b>NCEA Year:</b>	2004	<b>NCEA File Number:</b>	2
<b>Last Name:</b>	Nceacandidate	<b>First Name:</b>	Kiwi		
<b>Name 2:</b>	Student	<b>Name 3:</b>			
<b>Personal Information</b>					
<b>ID:</b>	<input type="text"/>				
<b>Gender:</b>	Male <input type="button" value="v"/>	<b>Date of Birth:</b>	07/17/1986 <input type="button" value="B"/>		
<b>Address 1:</b>	<input type="text" value="75 Stanaway Street"/>				
<b>Address 2:</b>	<input type="text" value="Northcote"/>				
<b>Address 3:</b>	<input type="text" value="Auckland"/>				
<b>Address 4:</b>	<input type="text"/>				
<b>City:</b>	<input type="text"/>	<b>School Code:</b>	<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:									
<b>NCEA Details</b>											
<input checked="" type="checkbox"/> UEBS Citizen		<input checked="" type="checkbox"/> UE Achieved									
<input checked="" type="checkbox"/> UE Numeracy Achieved		<input checked="" type="checkbox"/> UE Literacy Achieved									
<input checked="" type="checkbox"/> Level 3 Achieved		<input type="checkbox"/> Scholarship Qual Awarded									
Total Credits L3 Achieved:	<input type="text" value="117"/>	Total Credits L3 Not Achieved:	<input type="text"/>								
Total Schol Standards Achieved:	<input type="text" value="1"/>	Total Scholl Stds Not Achieved:	<input type="text" value="3"/>								
L3 Credits Achvd Previous Yrs:	<input type="text"/>										

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:									
<b>Subjects</b>											
Find   View All First 1 of 4 Last											
Test Component:	<input type="text" value="ACCTG"/> Accounting										
Total Credits Achieved:	<input type="text" value="24"/>										
Total Credits Not Achieved:	<input type="text"/>										

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		<b>Standard Result</b>		Messages					
<b>NSN:</b>	99132223	<b>NCEA Year:</b>	2004	<b>NCEA File Number:</b>	2										
<b>Last Name:</b>	Nceacandidate	<b>First Name:</b>	Kiwi												
<b>Name 2:</b>	Student	<b>Name 3:</b>													
										Find   View All		First	1 of 4	Last	
<b>Test Component:</b>	ACCTG	Accounting										+		-	
										Find   View All		First	1 of 6	Last	
<b>Standard Code:</b>	90500	<b>Version:</b>	1									+		-	
<b>Level:</b>	03	<b>Credit Value:</b>	4												
<b>Standard type:</b>	Achievement Standard	<b>Assessment type:</b>	External												
<input type="checkbox"/> UE Approved Subject															
<b>Result:</b>	A	<b>Date Completed:</b>	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	
<b>NSN:</b>	99132223	<b>NCEA Year:</b>	2004	<b>NCEA File Number:</b>	2						
<b>Last Name:</b>	Nceacandidate	<b>First Name:</b>	Kiwi								
<b>Name 2:</b>	Student	<b>Name 3:</b>									
Find   View All    First ◀ 1 of 1 ▶ Last											
<b>Run Date/Time:</b>	07/31/2005 5:15:59AM	<b>Process Instance:</b>	1130								
<b>User ID:</b>	PS	<b>Process Name:</b>	ADPSTNZL								
<b>Message Set Number:</b>	14200	<b>Message Number:</b>	129								
<b>Message Severity:</b>	M Message										
<b>Message Text:</b>	Search/Match has been completed.										
<b>Description:</b>	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'.										
<b>Comments:</b>	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:**

**\*NCEA Year:**

**\*NCEA File Number:**  ▼

**Process Single Record**

**National Student Number:**

### Search/Match/Post Exec Options

<i>Field or Control</i>	<i>Description</i>
<b>Search, Match and Post</b>	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.
<b>Post Only</b>	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).
<b>Search and Match Only</b>	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

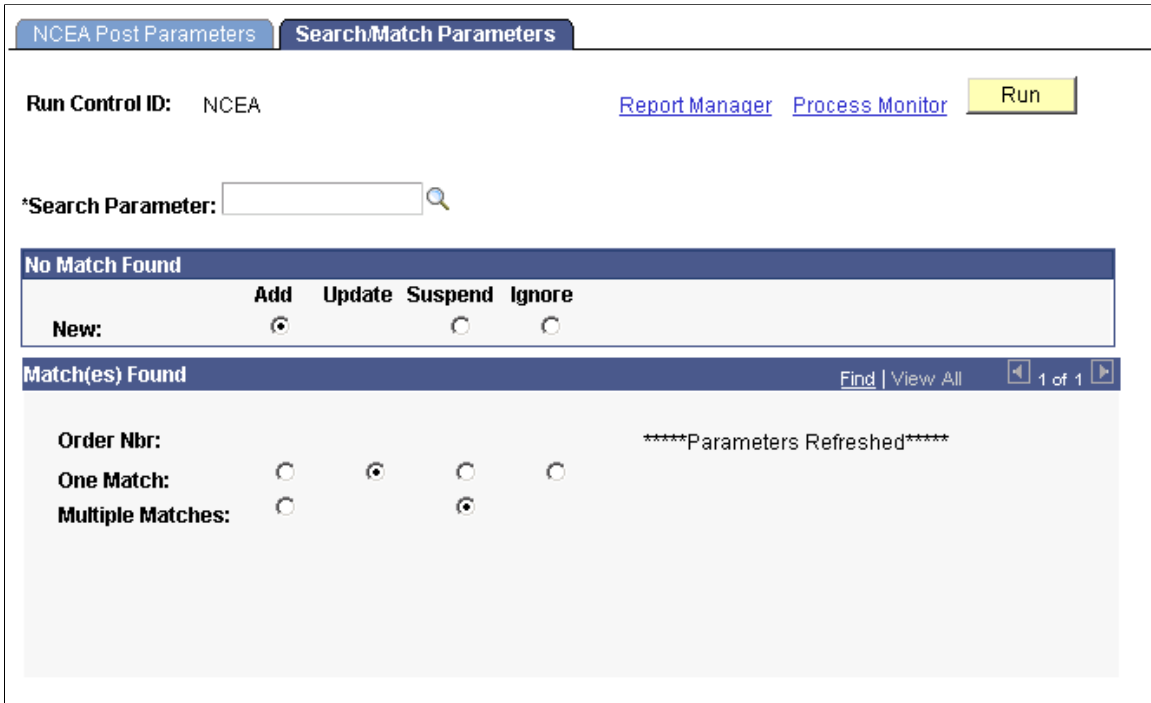
<b>Field or Control</b>	<b>Description</b>
<b>Academic Institution</b>	Enter the institution for which you want to post NCEA suspense data.
<b>NCEA Year</b>	Enter the year of the NCEA examination.
<b>NCEA File Number</b>	Specify the examination file you want to post. Values are: <ul style="list-style-type: none"> <li>• <i>First Examination File</i></li> <li>• <i>Second Examination File</i></li> <li>• <i>Third Examination File</i></li> </ul> <p>NCEA file number values are delivered with your system as translate values and you should not modify them.</p>
<b>Process Single Record</b>	Select this check box if you want to run the search/match/post process for a single suspense record. The <b>National Student Number</b> field becomes available.
<b>National Student Number</b>	The national student number for the single record you want to process. This field applies only if you have selected the <b>Process Single Record</b> 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.



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

<input checked="" type="checkbox"/> UE Achieved	<input checked="" type="checkbox"/> UE Literacy Achieved
<input checked="" type="checkbox"/> UE Numeracy Achieved	<input type="checkbox"/> Scholarship Qual Awarded
<input checked="" type="checkbox"/> Level 3 Achieved	L3 Credits Achvd Previous Yrs: <input type="text"/>
Total Credits L3 Achieved: <input type="text" value="117"/>	Total Credits L3 Not Achieved: <input type="text"/>
Total Schol Standards Achieved: <input type="text" value="1"/>	Total Scholl Stds Not Achieved: <input type="text" value="3"/>

Find | View All First 1 of 4 Last

Test Component: ACCTG Test Date: 12/31/2004 Data Source: Extract

Total Credits Achieved:  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

<b>Standard Code:</b> <input type="text" value="90500"/>	<b>Version:</b> <input type="text" value="1"/> <span style="float: right;">+ -</span>
<b>Level:</b> <input type="text" value="03"/>	<b>Credit Value:</b> <input type="text" value="4"/>
<b>Standard type:</b> <input type="text" value="Achievement Standard"/>	<b>Assessment type:</b> <input type="text" value="External"/>
<input type="checkbox"/> <b>UE Approved Subject</b>	
<b>Result:</b> <input type="text" value="A"/>	<b>Date Completed:</b> <input type="text" value="04/28/2004"/> <span style="float: right;">31</span>

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>
<b>NCEA Year and NCEA File Number</b>	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.
<b>All Suspense Rows</b>	Select this option if you want to purge all of the records in your suspense table, regardless of the status of the <b>Post</b> field on the Process Options page.
<b>Marked Suspense Rows</b>	Select this option if you only want to purge those records in your suspense file marked <i>Purge</i> in the <b>Post</b> 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 <b>Post</b> field on the Process Options page.
<b>Retain Associated Messages</b>	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
<b>Remove Associated Messages</b>	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	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Student Profile &gt; Bio/Demo Data</b>	Review basic biographical information for an individual.
Other Bio/Demo Data	SAD_NCEA_S_OTR_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Student Profile &gt; Other Bio/Demo Data</b>	Review biographical and demographic information for an individual.
Subjects	SAD_NCEA_SSUBJ_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Student Profile &gt; Subjects</b>	Review an individual's NCEA subject record.
Standard Result	SAD_NCEA_S_STD_NZL	<b>Student Admissions &gt; Processing Admissions NZL &gt; NCEA Student Profile &gt; Standard Result</b>	Review an individual's NCEA standard result record.

# (AUS) Managing Tertiary Admissions Centre Data Loads

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## 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.

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## 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:

<b>Task</b>	<b>Required for QTAC</b>	<b>Required for UAC</b>	<b>Required for SATAC</b>	<b>Required for VTAC</b>
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

<b>Task</b>	<b>Required for QTAC</b>	<b>Required for UAC</b>	<b>Required for SATAC</b>	<b>Required for VTAC</b>
5. Set up TAC program code mapping.	Yes	Yes	Yes	Yes
6. Set up DEST (DIISRTE) 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

<b>Task</b>	<b>Required for QTAC</b>	<b>Required for UAC</b>	<b>Required for SATAC</b>	<b>Required for VTAC</b>
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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Test Tables	SA_TEST_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Test Tables</b>	Set up TAC test IDs, such as QTAC, VTAC, SATAC, and UAC.
Test ID Security	SAD_TEST_SCTY	<b>Set Up SACR &gt; Security &gt; Secure Student Administration &gt; User ID &gt; Test ID Security</b>	Assign the TAC test IDs that a user can access. The system enforces test ID security in several components throughout the system.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
External Test Score Mapping	SAD_TEST_SETUP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; External Test Score Mapping</b>	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	<b>Set Up SACR &gt; Foundation Tables &gt; Reporting Codes &gt; Program Code Table AUS</b>	Define the TAC program codes to which the applicants will apply through a TAC or TACs.
Acad Prog AUS	SSR_ACAD_PROG_AUS	<b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Program Table &gt; Acad Prog AUS</b>	Map TAC program information to academic programs.
DEST Number Map	SAD_TAC_MAP_DEST	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; DEST Number Map</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Country Map</b>	Map TAC country codes to the PeopleSoft equivalent country field.
State Code Map	SAD_TAC_MAP_ST	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; State Code Map</b>	Map TAC state codes to the PeopleSoft equivalent state field.
Organization Table	EXT_ORG_TABLE	<b>Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; Organization Table &gt; Organization Table</b>	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.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
School Subject Maintenance	SCHOOL_SUBJECTS	<b>Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; School Subject Maintenance</b>	Define academic subjects for the external organizations.
External Organization Map	SAD_TAC_MAP_EXT	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; External Organization Map</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Qualification Level Map</b>	Map TAC qualification level codes to PeopleSoft external academic level codes.
Name Prefix Map	SAD_TAC_MAP_PFX	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Name Prefix Map</b>	Map TAC prefixes (MR, MISS, and MS) to general system name prefixes.
Program Action Reason Table	PROG_RSN_TBL	<b>Set Up SACR &gt; Product Related &gt; Student Records &gt; Program Action &gt; Program Action Reason Table</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Basis of Admission Map</b>	Map <i>Admit</i> program action reasons to the Basis of Admission codes provided by the TAC.
Admit Type Map	SAD_TAC_MAP_ADM	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Admit Type Map</b>	Associate admit types with basis of admission values.
Citizenship Map	SAD_TAC_MAP_CIT	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Citizenship Map</b>	Map TAC citizenship codes to the citizenship statuses set up for the country AUS and residency codes.
Ethnicity Map	SAD_ETHNICITY_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; External Test Scores &gt; Ethnicity Mapping</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Language Table	SSR_LANG_DEST	<b>Set Up SACR &gt; Product Related &gt; Student Records &gt; Enrolment Reporting Codes &gt; AUS Regulatory Report Setup &gt; Language Table</b>	Map language codes to DIISRTE language codes.
Offer Period Mapping	SAD_TAC_MAP_OFR	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Offer Period Mapping</b>	Map the Offering Month and Year provided in the TAC File to an admit term.
Honors Category Map	SAD_TAC_MAP_HONOUR	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; TAC &gt; Honors Category Map</b>	Map an honors category to the TAC Honors 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.

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 'User ID: SATRN15' label. Below the header is a table with two rows. Each row has a search bar for the test ID, a magnifying glass icon, the test ID name, and an 'Access Code' dropdown menu. The first row shows 'VTAC' for 'Victoria Tertiary Adm Centre' with an 'All Access' button. The second row shows 'SATAC' for 'South Aus Tertiary Adm Centre' with a 'Read/Write' dropdown. The table has a 'Find' button and navigation controls (First, 1-2 of 2, Last) at the top right.

*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 <input style="width: 80%;" type="text"/>	Queensland Tertiary Admission	+	-

Suspense Records
Customize | Find | View All | First 1-4 of 4 Last

Record (Table) Name	Record Description	Primary		
SAD_TAC_SUS_ANZ <input type="text"/>	TAC Suspense Table	<input checked="" type="checkbox"/>	+	-
SAD_TC_SFCT_ANZ <input type="text"/>	TAC Suspense FACT Code Table	<input type="checkbox"/>	+	-
SAD_TC_SQUL_ANZ <input type="text"/>	TAC Suspense Quals Table	<input type="checkbox"/>	+	-
SAD_TC_SSBJ_ANZ <input type="text"/>	TAC Suspense Subject Table	<input type="checkbox"/>	+	-

Candidate Data Records
Customize | Find | View All | First 1-4 of 4 Last

Record (Table) Name	Record Description	Primary		
SAD_TAC_SPS_ANZ <input type="text"/>	TAC Student Profile Table	<input checked="" type="checkbox"/>	+	-
SAD_TC_FCT_ANZ <input type="text"/>	TAC Student Profile FACT Table	<input type="checkbox"/>	+	-
SAD_TC_QUAL_ANZ <input type="text"/>	TAC Student Prof Quals Table	<input type="checkbox"/>	+	-
SAD_TC_SBJ_ANZ <input type="text"/>	TAC Main Subject Table	<input type="checkbox"/>	+	-

<i>Field or Control</i>	<i>Description</i>
<b>Test ID</b>	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

Find | View All First 1 of 1 Last

**Effective Date:**  BT      **Status:**

**\*Description:**

**Short Description:**

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

Find | View All First 1 of 2 Last

**Effective Date:** 01/01/2005      **Status:** Active

**\*Field of Study:**  Q Economics

**Field of Education Code:**  Q Business Management

**Program Type Code:**  Q Bachelor's Pass

**Special Program Type:**  Q Not Course of Special Interest

**Aggregated EFTSL:**  Q 3 Years

**Minimum Units:**

**Program Eligibility:**

**CRICOS Code:**

Combined Course Indicator

DEST Related Programs Customize | Find 

1		+	-
---	--	---	---

 First 1 of 1 Last

#	Related Academic Program	*Status	
1	<input type="text"/>	Active	<input type="text"/>

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" with a navigation bar at the top containing "Find | View All", "First", "3 of 8", and "Last". The form contains the following fields and controls:

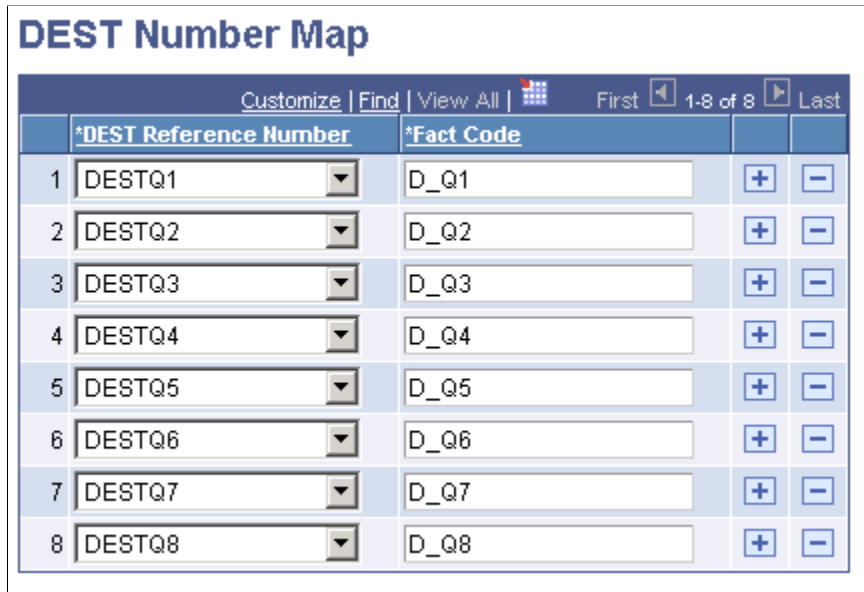
- Program Code:** A text input field containing "3502" with a magnifying glass icon and a dropdown arrow. To its right, the text "Bachelor of Commerce" is displayed.
- TAC Stream Code:** An empty text input field.
- Academic Load:** A dropdown menu with "Full-Time" selected.
- Academic Plan:** A text input field containing "ACCOUNTING" with a magnifying glass icon and a dropdown arrow. To its right, the text "Accounting" is displayed.
- Mode of Attendance:** A dropdown menu with "Internal Mode of Attendance" selected.
- Campus:** A text input field containing "MAIN" with a magnifying glass icon and a dropdown arrow. To its right, the text "Main Campus" is displayed.

<i>Field or Control</i>	<i>Description</i>
<b>Program Code</b>	Associate a TAC program code with an academic program that your institution offers. TAC program codes can be mapped to only one academic program.
<b>TAC Stream Code</b>	Applicable to only SATAC and VTAC.
<b>Academic Load</b>	Enter the academic load that the TAC Load process assigns to the admission applications for the program.
<b>Academic Plan</b>	Enter the academic plan that the TAC Load process assigns to the admission applications for the program.
<b>Mode of Attendance</b>	Enter the mode of attendance that the TAC Load process assigns to the admission applications for the program.
<b>Campus</b>	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.



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.

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**Note:** SATAC provides the prior education data in the applicant file, *not* the FACT file. Therefore, DEST number mapping is optional for SATAC.

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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:

<b>Data</b>	<b>Supplied by QTAC</b>	<b>Supplied by UAC</b>	<b>Supplied by SATAC</b>	<b>Supplied by VTAC</b>
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.

The screenshot shows the 'Organization Table' page with the following fields and controls:

- External Org ID:** QLD
- Organization Details:**
  - \*Effective Date: 01/01/1900
  - \*Status: Active
  - \*Description: Queensland
  - Long Description: Queensland
  - Short Description: Queensland
  - \*Organization Type: School
  - \*Proprietorship: Public
  - Offers Courses
- Primary Location:**
  - Location: [Search Icon]
  - Address Line 1: [Text Field]
  - Address Line 2: [Text Field]
  - Address Line 3: [Text Field]
  - Address Line 4: [Text Field]
  - City: [Text Field]
  - Postal: [Text Field]
  - EDI Address: [Text Field]
  - URL Address: [Text Field]
  - State / Province: [Text Field]
  - Country: [Text Field]

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:

<b>Organization Code</b>	<b>Description</b>
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).

The screenshot displays the 'School Subject Maintenance' interface. At the top, it shows 'Org ID: QLD Queensland'. Below this, there are two main sections, each representing a different school subject.

**Section 1: Accounting**

- School Subject:** ACCT Accounting
- School Subject Details:**
  - \*Effective Date:** 01/01/1900
  - \*Status:** Active
  - \*Description:** Accounting
  - Short Description:** Accounting
  - \*External Subject Area:** ACCT Accounting

**Section 2: Economics**

- School Subject:** ECON Economics
- School Subject Details:**
  - \*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).

*School Subject: BIOL <input type="text"/> <input type="button" value="🔍"/> Biology <input type="button" value="+"/> <input type="button" value="-"/>	
<b>School Subject Details</b> Find First <input type="button" value="⏪"/> 1 of 1 <input type="button" value="⏩"/> Last	
*Effective Date: 01/01/1900 <input type="text"/> <input type="button" value="📅"/> *Status: Active <input type="button" value="▼"/> <input type="button" value="+"/> <input type="button" value="-"/>	
*Description: <input type="text"/> Biology	
Short Description: <input type="text"/> Biology	
*External Subject Area: BIOL <input type="text"/> <input type="button" value="🔍"/> Biology	
*School Subject: ENGL <input type="text"/> <input type="button" value="🔍"/> English <input type="button" value="+"/> <input type="button" value="-"/>	
<b>School Subject Details</b> Find First <input type="button" value="⏪"/> 1 of 1 <input type="button" value="⏩"/> Last	
*Effective Date: 01/01/1900 <input type="text"/> <input type="button" value="📅"/> *Status: Active <input type="button" value="▼"/> <input type="button" value="+"/> <input type="button" value="-"/>	
*Description: <input type="text"/> English	
Short Description: <input type="text"/> English	
*External Subject Area: ENGL <input type="text"/> <input type="button" value="🔍"/> 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			
<b>SetID:</b>	PSAUS		
<b>Program Action:</b>	ADMT	Admit	
<b>Action Reason:</b>	37		
Find   View All    First 1 of 1 Last			
<b>*Effective Date:</b>	01/01/1900	<b>*Status:</b>	Active
<b>*Description:</b>	Professional Qualification		
<b>Short Description:</b>	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 TCSI Reporting” (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.

<b><i>Ethnic Group</i></b>	<b><i>Ethnicity Code</i></b>
Aboriginal	3
Torres Strait Islander	4
Aboriginal and Torres Strait Islander	5

The following table shows the required mapping for VTAC.

<b><i>Ethnic Group</i></b>	<b><i>Ethnicity Code</i></b>
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 TCSI 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.

<b>Field or Control</b>	<b>Description</b>
<b>Copy from Career</b>	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.
<b>Offer Year and Offer Month</b>	<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> <hr/> <p><b>Note:</b> 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**).



<b>Field or Control</b>	<b>Description</b>
<b>TAC Honors Code</b>	Enter the honors code provided in the TAC Qualifications file.
<b>Honors Category</b>	Enter the PeopleSoft honors category applicable to the TAC honours code.

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**Note:** You should perform this mapping only if you are loading QTAC data.

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## 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**s 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
TAC Load	SAD_TAC_LOAD_RUN	<b>Student Admissions &gt; TAC Processing &gt; TAC Load</b>	Specify a TAC test ID and designate the directory location for each of the TAC files. Run the load process.  <b>Note:</b> You should complete the full loading, search/match and posting process before loading a new set of data. If you have TAC loads waiting to be processed, do not load a new TAC file until you have processed the data in your suspense files.

## Setting Up Load Parameters and Loading the File

Access the TAC Load page (**Student Admissions > TAC Processing > TAC Load**).

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:  BT

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.

<i>File Number</i>	<i>QTAC</i>	<i>UAC</i>	<i>SATAC</i>	<i>VTAC</i>
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	

<b>File Number</b>	<b>QTAC</b>	<b>UAC</b>	<b>SATAC</b>	<b>VTAC</b>
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	

<b>Field or Control</b>	<b>Description</b>
<b>Test ID</b>	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.
<b>Academic Institution</b>	Enter the institution for which you want to load the data.
<b>Admit Type</b>	Applicable to only SATAC and VTAC. Enter a value only if applicants do not have an admission offer (basis of admission).
<b>Date Loaded</b>	Enter the date of the data load process. The system populates this field to the current date by default.
<b>Processing Indicator</b>	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.
<b>Initial Course Character</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Offers</b>	<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 <b>Initial Course Character</b> value.</p>
<b>File Input Path</b>	<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>
<b>Run</b>	<p>Click the run button to run the SAD_TAC_LOAD Application Engine process at user-defined intervals.</p>

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**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.

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## 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.

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**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.

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## Pages Used to Review and Edit Suspense Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Options	SAD_TAC_SUS_PROC	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; TAC Suspense &gt; Process Options</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Personal Information</b>	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_ADDRC	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Address</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Qualifications</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Subjects</b>	Review and edit information about subject courses taken by the student. This data populates external education data as part of the posting process.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Offers	SAD_TAC_SUS_OFFER	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Offers</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Fact</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Residency</b>	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_PRFSA	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Preferences</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; VIC Data</b>	Review and edit biographical and demographic information for this student from the Victorian TAC.
Common Assessment Tasks	SAD_TAC_SUS_CAT	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Common Assessment Tasks</b>	Review and edit information about the Common Assessment Tasks for applicants from the Victorian TAC.
VIC Results	SAD_TAC_SUS_VIC_RS	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; VIC Results</b>	Review and edit information about result summaries for applicants from the Victorian TAC.
VCAL Studies	SAD_TAC_SUS_VCL	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; VCAL Studies</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; VCAL Units</b>	Review and edit information about VCAL units for applicants from the Victorian TAC.
Assessment Data	SAD_TAC_SUS_VIC_AS	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; Assessment Data</b>	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	<b>Student Admissions &gt; TAC Processing &gt; TAC Suspense &gt; PCRS</b>	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
<b>Last Name:</b>	Xthomas	<b>External Application Nbr:</b>	281001541			
<b>First Name:</b>	Leona	<b>Date Loaded:</b>	07/11/2006			
<b>Middle Name:</b>	Maureen Dhu	<b>Test ID:</b>	QTAC			
<b>Processing Options</b>						
<b>Edit:</b>	Complete	<b>Search:</b>	Complete	<b>Post:</b>	Purge	
<b>Search / Match Results</b>						
<b>Order Number:</b>	30	<b>Matches:</b>	3			
<b>Messages</b> <span style="float: right;"><a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a>   1-3 of 3   <a href="#">Last</a></span>						
<b>Messages</b>		<b>Information</b>				
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

<b>Field or Control</b>	<b>Description</b>
<b>Edit</b>	<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>
<b>Search</b>	<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>
<b>Post</b>	<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>

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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.

<b>Post Value</b>	<b>Meaning</b>	<b>How Set</b>
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

<b>Field or Control</b>	<b>Description</b>
<b>Message Severity</b>	The message severity, such as <i>Message</i> or <i>Error</i> .
<b>Message Text</b>	The message on this row of data.
<b>Description</b>	The detailed message.
<b>Comments</b>	Results or other additional information about the message.
<b>Process Instance</b>	The process number of the process that you ran for this record. The Process Scheduler generates this number.
<b>Run Date/Time</b>	The day and time the process ran for this record.
<b>Process Name</b>	The name of the application engine that you ran for this record.
<b>User ID</b>	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	<b>Personal Information</b>	Address	Residency	Qualifications	Subjects	Offers	Preferences	VIC Data	D
Last Name	Wilson	External Application Nbr	98765002A						
First Name	Heather	Date Loaded	12/07/2018						
Middle Name	Nikki	Test ID	VTAC						
<b>Personal Information</b>									
ID	NEW	<input checked="" type="checkbox"/> OK to Post							
Applicant Number		CHESN	5666342112						
Name Prefix									
Gender	Female								
Other Name									
Other Name 2									
Previous First Name									
Previous Second Name	NICOLE								
Date of Birth	11/17/1999	TAC Birthdate							
Birth Country	AUS	Australia							
Citizenship	Citizen								
FEE-HELP Balance	0.00								
DEST As At Date									
Year 12 Location		School Postcode							

This example illustrates the fields and controls on the Personal Information page (2 of 2).

### Contact Information

Standard Address Format

Address 1

Address 2

Address 3

Address 4

City

State

Postal Code

Country  Germany

Area Code

Daytime Telephone

Mobile

Other Area Code

Other Phone

FAX

Email Address

### Proxy Information

Proxy Name

Proxy Relationship

Proxy DOB

Proxy Phone

Proxy Email

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.

<b>Process Options</b>	<b>Personal Information</b>	<b>Address</b>	<b>Residency</b>	<b>Qualifications</b>	
<b>Last Name:</b>	Glover	<b>External Application Nbr:</b>	123000018		
<b>First Name:</b>	John	<b>Date Loaded:</b>	02/13/2007		
<b>Middle Name:</b>		<b>Test ID:</b>	SATAC		
<b>Current Address</b>					
<b>Address 1:</b>	<input type="text" value="15 GINGER CRESCENT"/>				
<b>Address 2:</b>	<input type="text"/>				
<b>Address 3:</b>	<input type="text"/>				
<b>Address 4:</b>	<input type="text"/>				
<b>City:</b>	<input type="text" value="DEERPARK"/>				
<b>State:</b>	<input type="text" value="VIC"/>	Victoria			
<b>Postal:</b>	<input type="text"/>				
<b>Country:</b>	<input type="text" value="AUS"/>	Australia			
<b>Residential Address</b>					
<b>Address 1:</b>	<input type="text" value="18 Longbeach Road"/>				
<b>Address 2:</b>	<input type="text" value="Somerset"/>				
<b>Address 3:</b>	<input type="text"/>				
<b>Address 4:</b>	<input type="text"/>				
<b>City:</b>	<input type="text" value="Melbourne"/>				
<b>State:</b>	<input type="text" value="VIC"/>				
<b>Postal:</b>	<input type="text" value="3000"/>				
<b>Country:</b>	<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	
<b>Last Name:</b>	Anderson	<b>External Application Nbr:</b>	27005784L						
<b>First Name:</b>	Saverio	<b>Date Loaded:</b>	23/09/2009						
<b>Middle Name:</b>		<b>Test ID:</b>	VTAC						
<b>Residency</b>									
<b>Perm Residency:</b>	<input type="text"/>	<b>Citizenship:</b>	<input type="text" value="5"/>						
<b>Residency:</b>	<input type="text" value="AUS"/>	Australian Resident							
<b>Home Residency:</b>	<input type="text" value="5045"/>	<b>Permanent Residency Date:</b>	<input type="text"/>						
<b>Apply for Home Residency:</b>	<input type="checkbox"/>	<b>Application Check:</b>	<input type="checkbox"/>						
<b>Citizenship Country:</b>	<input type="text"/>								
<b>Language Indicator:</b>	<input type="text" value="E"/>	<b>Language Code:</b>	<input type="text" value="EN"/>						
<b>Method A:</b>	<input type="text"/>	<b>Method B:</b>	<input type="text"/>						
<b>Consulate:</b>	<input type="text"/>								
<b>Passport First Name:</b>	<input type="text"/>								
<b>Passport Middle Name:</b>	<input type="text"/>								
<b>Passport Last Name:</b>	<input type="text"/>								
<b>Final Applicant Decision:</b>	<input type="checkbox"/>	<b>Enrollment Indicator:</b>	<input type="checkbox"/>						
<b>Ethnicity:</b>	<input type="text" value="2"/>	<b>Applicant Born Indicator:</b>	<input type="text" value="A"/>						
<b>Year Arrival:</b>	<input type="text"/>	<b>Enrollment Preference Number:</b>	<input type="text"/>						
<b>Highest Attain:</b>	<input type="text"/>								
<b>Highest Education Parent/Guardian 1:</b>	<input type="text" value="59"/>	Unknown							
<b>Highest Education Parent/Guardian 2:</b>	<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.

<b>Process Options</b>		<b>Personal Information</b>		<b>Residency</b>		<b>Qualifications</b>		<b>Subjects</b>	
<b>Last Name:</b>	Beethoven	<b>External Application Nbr:</b>	730512311	<b>First Name:</b>	Anthony	<b>Date Loaded:</b>	25/06/2009	<b>Middle Name:</b>	
		<b>Test ID:</b>	QTAC						
<b>Qualifications</b> Find   View All First 1 of 1 Last									
<b>Ext Org ID:</b>	000010092		Landmark College						
<b>Level:</b>	6	<b>TAC Origin of Qualification:</b>	3019						
<b>TAC Course Code:</b>	Ter-BACHELOR-1								
<b>TAC Course Title:</b>	B-Arts								
<b>Year:</b>	2005	<b>Institution/Course Code:</b>	2000						
<b>Type:</b>		<b>Start Year:</b>	1999						
<b>Field of Study:</b>	090000	<b>Result Number:</b>							
<b>Student Nbr:</b>	40793867	<b>FTE:</b>	0.500000						
<b>VTAC State:</b>		<b>Result:</b>	67.100						
<b>Number:</b>	2	<b>Honors Category:</b>	Magna						
<b>Rank:</b>	73	<b>Status:</b>							
<b>Level VET:</b>		<b>VET Type:</b>							
<b>School Code:</b>									

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.

<b>Process Options</b>		<b>Personal Information</b>		<b>Residency</b>		<b>Qualifications</b>		<b>Subjects</b>	
<b>Last Name:</b>	Beethoven	<b>External Application Nbr:</b>	730512311	<b>First Name:</b>	Anthony	<b>Date Loaded:</b>	24/06/2009	<b>Middle Name:</b>	
		<b>Test ID:</b>	QTAC						

Subjects		Find   View All	First	1 of 7	Last
<b>External Org ID:</b>	000000001		Cottonwood High School		
<b>TAC Course Code:</b>	SEC-QLD-SEP	<b>Semester:</b>	4		
<b>Number:</b>	1	<b>Type:</b>	SBSU		
<b>Level:</b>	5	<b>Fact Score:</b>	<input type="text"/>		
<b>Estimated Score:</b>	<input type="text"/>	<b>TAC Subject Title:</b>	ENGLISH		
<b>Code:</b>	001	<b>Results:</b>	VH		
<b>Year:</b>	2003	<b>Old Subject Grade:</b>	<input type="text"/>		
<b>Old Subject Mark:</b>	<input type="text"/>	<b>Unit 2 Result:</b>	<input type="text"/>		
<b>Unit 1 Result:</b>	<input type="text"/>	<b>Unit 4 Result:</b>	<input type="text"/>		
<b>Unit 3 Result:</b>	<input type="text"/>	<b>Year 12 Year:</b>	2003		
<b>Avg CAT Grade:</b>	<input type="text"/>	<b>TAC State Code:</b>	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.

<b>Qualifications</b>		<b>Subjects</b>		<b>Preferences</b>		<b>Offers</b>		<b>PCRS</b>		<b>Fact</b>	
<b>Last Name:</b>	Lawson	<b>External Application Nbr:</b>	123000022	<b>First Name:</b>	John	<b>Date Loaded:</b>	02/13/2007	<b>Middle Name:</b>	Volvo	<b>Test ID:</b>	SATAC
<b>Preference Data</b> <span style="float:right">Find   View All   First 1 of 1 Last</span>											
<b>Academic Program:</b>	<input type="text" value="BART"/>										
<b>Program Code:</b>	<input type="text" value="114021"/>										
<b>Preference Nbr:</b>	<input type="text" value="1"/>										
<b>Course Title:</b>	<input type="text" value="B PHARMACY"/>										
<b>TAC Plan:</b>	<input type="text"/>										
<b>Offer Round Number:</b>	<input type="text" value="5"/>										
<b>TAC Stream Title:</b>	<input type="text"/>										
<b>TAC Stream Code:</b>	<input type="text"/>										
<b>Offer Date:</b>	<input type="text" value="02/13/2007"/>										
<b>Offer Response:</b>	<input type="checkbox"/>										
<b>CAS Value:</b>	<input type="text" value="YES"/>										
<b>CAS type:</b>	<input type="text" value="CAS"/>										
<b>Admission:</b>	<input type="text" value="31"/>										
<b>Date</b>	<input type="text" value="08/28/2006"/>										
<b>Offer Status:</b>	<input type="text" value="Y"/>										
<b>CAS Reason:</b>	<input type="text" value="Allocatable."/>										
<b>Admission:</b>	<input type="text" value="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			Date Loaded:	11/03/2016						
First Name:	First02			Test ID:	VTAC										
Middle Name:	Second02														
<b>Victorian Suspense Details</b>															
Year of application:	<input type="text" value="2016"/>			Category:	<input type="text" value="V02"/>										
UMAT/ISAT Type	<input type="checkbox"/>			UMAT/ISAT Identification:	<input type="text"/>										
Exempt Indicator:	<input type="text" value="P"/>														
Stat Type:	<input type="checkbox"/>			Stat Percentile:	<input type="text"/>										
Supplemental Indicator:	<input type="checkbox"/>			SEAS Application:	<input type="text" value="Y"/>										
Hearing Problem:	<input type="text" value="A"/>			Scholarship Application:	<input type="text" value="A"/>										
Learning Problem:	<input type="text" value="B"/>			ATAR Type:	<input type="text" value="A"/>										
Medical Problem:	<input type="text" value="C"/>			ATAR:	<input type="text" value="60.80"/>										
Mobility Problem:	<input type="text" value="D"/>			Achieved Aggregate Score:	<input type="text" value="115.00"/>										
Vision Problem:	<input type="text" value="E"/>			ATAR Calculating Authority:	<input type="text" value="VTAC"/>										
Other Problem:	<input type="text" value="F"/>			Fee eligibility for Type 4:	<input type="text" value="2"/>										
Disability Advice Required:	<input type="text" value="G"/>														
ASGS Rating:	<input type="text" value="2"/>			SEIFA % for Postcode:	<input type="text" value="72"/>										
Statistical Area 1:	<input type="text" value="8604278"/>			SEIFA % for SA1:	<input type="text" value="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.

<b>VIC Data</b>		<b>Common Assessment Tasks</b>		VIC Results	VCAL Studies	VCAL Units
<b>Last Name:</b>	Carlton	<b>External Application Nbr:</b>	27004793D			
<b>First Name:</b>	Craig	<b>Date Loaded:</b>	11/05/2007			
<b>Middle Name:</b>	Andrew	<b>Test ID:</b>	VTAC			
<b>Common Assessment</b> Find   View All First 1 of 15 Last						
<b>External Org ID:</b>	01060	Ballarat High School				
<b>TAC Course Code:</b>	YEAR 12 RESULTS-1999					
<b>Subject Code:</b>	BM	<b>CAT Number:</b>	1			
<b>Common Assessment Task</b>						
<b>Task ID:</b>	1	<b>Grade:</b>	C+			
<b>Estimated CAT Grade:</b>		<b>Remark:</b>				
<b>Consideration of Disadvantages</b>						
<b>Permanent Disadvantage:</b>	<input type="checkbox"/>	<b>Environment:</b>	<input type="checkbox"/>			
<b>Sickness:</b>	<input type="checkbox"/>	<b>Absent:</b>	<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.

<b>Offers</b>		<b>Preferences</b>		<b>VIC Data</b>		<b>Common Assessment Tasks</b>		<b>VIC Results</b>		VCAL Studies	VCAL Units
<b>Last Name:</b>	Farnsworth	<b>External Application Nbr:</b>	88217311F								
<b>First Name:</b>	Jake	<b>Date Loaded:</b>	27/09/2011								
<b>Middle Name:</b>	William	<b>Test ID:</b>	VTAC								
<b>VIC Results</b> Find   View All First 1 of 4 Last											
<b>Result Year:</b>	2008	<b>Type of Schooling Indicator:</b>	N								
<b>VCAA Indicator:</b>	S	<b>VTAC Indicator:</b>	T								
<b>ENTER Type:</b>	A	<b>ENTER:</b>	84.75								
<b>Accrediting Authority Code:</b>	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 Data		Common Assessment Tasks		VIC Results		VCAL Studies		VCAL Units	
<b>Last Name:</b>	Rogers	<b>External Application Nbr:</b>	27009448A						
<b>First Name:</b>	Kristine	<b>Date Loaded:</b>	11/05/2007						
<b>Middle Name:</b>	Eloise	<b>Test ID:</b>	VTAC						
<b>VCAL Studies</b> Find   View All First 1 of 3 Last									
<b>VCAL Cert Year:</b>	<input type="text" value="2003"/>	<b>VCAL Cert Result Status:</b>	<input type="text" value="S"/>						
<b>VCAL Cert Code:</b>	<input type="text" value="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 Data		Common Assessment Tasks		VIC Results		VCAL Studies		VCAL Units	
<b>Last Name:</b>	Rogers	<b>External Application Nbr:</b>	27009448A						
<b>First Name:</b>	Kristine	<b>Date Loaded:</b>	11/05/2007						
<b>Middle Name:</b>	Eloise	<b>Test ID:</b>	VTAC						
<b>VCAL Units</b> Find   View All First 1 of 15 Last									
<b>VCAL Unit Year:</b>	<input type="text" value="2005"/>	<b>VCAL Unit Result Status:</b>	<input type="text" value="S"/>						
<b>VCAL Unit Code:</b>	<input type="text" value="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.

<b>Last Name:</b>	Rogers	<b>External Application Nbr:</b>	27009448A
<b>First Name:</b>	Kristine	<b>Date Loaded:</b>	11/05/2007
<b>Middle Name:</b>	Eloise	<b>Test ID:</b>	VTAC
<b>Assessment Data</b>			
<b>UTESL - Reading:</b>	<input type="text" value="1"/>	<b>VTAC Assess 1:</b>	<input type="text" value="999"/>
<b>UTESL - Listening:</b>	<input type="text" value="2"/>	<b>VTAC Assess 2:</b>	<input type="text" value="888"/>
<b>UTESL - Writing:</b>	<input type="text" value="3"/>	<b>VTAC Assess 3:</b>	<input type="text" value="777"/>
<b>UTESL - Global:</b>	<input type="text" value="4"/>	<b>VTAC Assess 4:</b>	<input type="text" value="666"/>
<b>Australian Equivalent:</b>	<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.

<a href="#">Process Options</a>	<a href="#">Personal Information</a>	<a href="#">Residency</a>	<a href="#">Qualifications</a>	<a href="#">Subjects</a>	<b><a href="#">Offers</a></b>	<a href="#">Fact</a>
Last Name Vivaldi			External Application Nbr 730444567			
First Name Anna			Date Loaded 11/29/2018			
Middle Name Maree			Test ID QTAC			
<b>Offer Details</b>						
Admit Type <input type="text" value="OTH"/>			School Code <input type="text"/>			
Application Date <input type="text" value="09/19/2012"/>			Offer Date <input type="text" value="09/15/2012"/>			
TER Score <input type="text" value="199.000"/>			OP Score <input type="text"/>			
Round Number <input type="text" value="100"/>			Program Code <input type="text" value="707001"/>			
Academic Program <input type="text" value="BSCI"/>			TAC Stream Code <input type="text"/>			
Preference Nbr <input type="text" value="1"/>			Overall Status <input type="text"/>			
Schedule <input type="text" value="FORCED OFFER"/>			Offer Month <input type="text" value="NOV"/>			
Rank Set <input type="text" value="199:"/>			Offer Year <input type="text" value="2013"/>			
Base Schedule <input type="text" value="S1212"/>						
Base Rank Set <input type="text" value="98:98:86:"/>						
Basis of Admission <input type="text" value="AUTO"/>			Admission Type <input type="text"/>			
Field Posn A <input type="text"/>			Field Posn B <input type="text"/>			
Field Posn C <input type="text"/>			Field Posn D <input type="text"/>			
Field Posn E <input type="text"/>			Applicant Type <input type="text"/>			
Offering Label <input type="text" value="label 1"/>						
Offered CRS Label <input type="text" value="FORCED OFFER"/>						
QCE Eligibility <input type="text" value="Y"/>						
Centrelink Status <input type="text" value="Y"/>						
Weighted EAS Score <input type="text" value="123"/>						
<b>Forced Offer Reason</b>						
<input type="text" value="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	
<b>Last Name:</b>	Lawson	<b>External Application Nbr:</b>	123000022								
<b>First Name:</b>	John	<b>Date Loaded:</b>	02/13/2007								
<b>Middle Name:</b>	Volvo	<b>Test ID:</b>	SATAC								
<b>Fact Values</b> <span style="float:right">Customize   Find   View All   First 1-5 of 11 Last</span>											
	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	
<b>Last Name:</b>	Lawson	<b>External Application Nbr:</b>	123000022								
<b>First Name:</b>	John	<b>Date Loaded:</b>	02/13/2007								
<b>Middle Name:</b>	Volvo	<b>Test ID:</b>	SATAC								
<b>Preference Data</b> <span style="float:right">Find   View All   First 1 of 1 Last</span>											
<b>Academic Program:</b>	BART	<b>Preference Nbr:</b>	1								
<b>Preference Course Rank Set</b> <span style="float:right">Find   View All   First 1 of 2 Last</span>											
<b>Label:</b>	CRSSA3TH_CALC	<b>BOA Code:</b>	31								
<b>Value:</b>	299:										
<b>Reason:</b>	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.



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## 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	<b>Student Admissions &gt; TAC Processing &gt; Search/Match/Post TAC &gt; TAC Run Search/Match Post</b>	Post external TAC data from suspense files. Before you post the data, however, set up the search/match parameters on the Search Params page. You can post a single record or all of the records in the suspense file.
Search Params	SEARCH_PARAMS	<b>Student Admissions &gt; TAC Processing &gt; Search/Match/Post TAC &gt; Search Params</b>	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.

The screenshot shows the 'TAC Run Search/Match Post' interface. At the top, there are tabs for 'TAC Run Search/Match Post' and 'Search Params'. Below the tabs, the 'Run Control ID' is set to 'UAC', with links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The 'TAC Code' field contains 'UAC' and is associated with 'New South Wales'. The 'Execution Option' section has three radio buttons: 'Search, Match and Post' (selected), 'Post Only', and 'Search and Match Only'. The 'Post Processing Parameters' section includes fields for 'Academic Institution' (PSAUS, PeopleSoft Australia Uni), 'Date Loaded' (12/12/2007), a 'Process Single Record' checkbox, and dropdown menus for 'Address Type' (Mailing), 'Phone Type' (Home), 'Email Type' (Other), 'Academic Level' (1st Year), and 'Application Method' (EDI). The 'Application Defaults' section at the bottom has a search bar and navigation controls, with fields for 'Academic Career' (PGRD, Postgraduate), 'Admit Term' (0581, Semester 1 - Autumn 2007), 'Application Center' (PGRD, Postgraduate Admissions Office), and '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

<i>Field or Control</i>	<i>Description</i>
<b>Search, Match and Post</b>	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.
<b>Post Only</b>	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).

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Search and Match Only</b>	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

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Academic Institution</b>	Enter the academic institution to which the applicant data will be posted.
<b>Date Loaded</b>	Enter the date for the data load.
<b>Process Single Record</b>	If you prefer to process and post a single record, in the <b>Post Processing Parameters</b> group box, select the <b>Process Single Record</b> check box and specify the external applicant number. Rather than processing the entire file, you can quickly process a single record. If you prefer to process the entire suspense file, do not select <b>Process Single Record</b> .

<b>Field or Control</b>	<b>Description</b>
<b>Address Type</b>	<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"> <li>• 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.</li> <li>• The search/match/post process assigns the home address type set on the <b>Campus Community Installation - Names / Addresses</b> page to the residential address.</li> <li>• If the Campus Community home address type field and the <b>Address Type</b> 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.</li> </ul> <hr/> <p><b>Note:</b> 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/>
<b>Phone Type</b>	Select the phone type that you want the process to assign.
<b>Email Type</b>	Select the email type that you want the process to assign.
<b>Academic Level</b>	Select the default academic level for this upload of applicants.
<b>Application Method</b>	Select the default application method for this upload of applicants.
<b>Academic Career</b>	Enter the academic career to which applicants will be posted.
<b>Admit Term</b>	Enter the admit term for the applicants.
<b>Application Center</b>	Enter the default application center for these applicants.

<i>Field or Control</i>	<i>Description</i>
<b>Recruiting Center</b>	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.

The screenshot shows the 'Search Params' page with the following elements:

- Navigation tabs: 'TAC Run Search/Match Post' and 'Search Params'.
- Run Control ID: 'UAC' with links for 'Report Manager' and 'Process Monitor', and a 'Run' button.
- \*Search Parameter: A search box containing 'PSCS\_TRADITIONAL' and a dropdown menu showing 'CS\_Person\_Traditional'.
- 'No Match Found' section with columns: Add, Update, Suspend, Ignore. Under 'New:', 'Add' is selected.
- 'Match(es) Found' section with a table of results. The first row is for 'Order Nbr: 10' with parameters 'Name,Addr,City,Bday,Gender,SSN'. It shows 'One Match' selected. The second row is for 'Order Nbr: 20' with parameters 'SSN Only', showing 'Multiple Matches' selected.
- Footer text: '\*\*\*\*\*Parameters Refreshed\*\*\*\*\*'.

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

<b>Field or Control</b>	<b>Description</b>
<b>New</b>	<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.

<b>Field or Control</b>	<b>Description</b>
<b>Order Nbr</b> (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.
<b>One Match and Multiple Matches</b>	<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	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Purge</b>	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>
<b>TAC Code</b>	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.
<b>Date Loaded</b>	Enter the date when the files, which you want to purge, were loaded.
<b>All Suspense Rows</b>	Select this option if you want to purge all of the records in your suspense table, regardless of the status of the <b>Post</b> field on the Process Options page.
<b>Marked Suspense Rows</b>	Select this option if you only want to purge those records in your suspense file marked <i>Purge</i> in the <b>Post</b> 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.
<b>Retain Associated Messages</b>	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>
<b>Remove Associated Messages</b>	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	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Personal Information</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Address	SAD_TAC_CD_ADD_CUR	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Address</b>	Review address details about a student.
Qualifications	SAD_TAC_CD_QULSAS	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Qualifications</b>	Review qualifications details for a student.
Subjects	SAD_TAC_CD_SBJS	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Subjects</b>	Review subjects taken by a student.
Offer	SAD_TAC_CD_OFFER	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Offer</b>	Review details about the offer for a student.
Fact	SAD_TAC_CD_FACT	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>FACT</b>	Review FACT data (including DIISRTE questions) about a student.
Residency	SAD_TAC_CD_BIO_RES	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Residency</b>	Review residency and additional DIISRTE reporting information about a student.
Preferences	SAD_TAC_CD_PRFS	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Preferences</b>	Review preference details for a student.
VIC Data	SAD_TAC_CD_VIC_OTR	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>VIC Data</b>	Review biographical and demographic information for a student from the Victorian TAC.
Common Assessment Tasks	SAD_TAC_CD_CAT	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Common Assessment Tasks</b>	Review common assessment task details for a student.
VIC Results	SAD_TAC_CD_VIC_RSL	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>VIC Results</b>	Review results details for a student from the Victorian TAC.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
VCAL Studies	SAD_TAC_CD_VCL	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC</b> <b>Candidate Data</b> > <b>VCAL</b> <b>Studies</b>	Review information about VCAL Studies.
VCAL Units	SAD_TAC_CD_VCU	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC</b> <b>Candidate Data</b> > <b>VCAL</b> <b>Units</b>	Review information about VCAL units.
Assessment Data	SAD_TAC_CD_VIC_AS	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC Candidate Data</b> > <b>Assessment Data</b>	Review information about assessment data for graduate entry teaching.
PCRS (preference course rank set)	SAD_TAC_CD_PCRSA	<b>Student Admissions</b> > <b>TAC Processing</b> > <b>TAC</b> <b>Candidate Data</b> > <b>PCRS</b>	Review a student's preference course rank set information.



## Chapter 26

# (CAN) Receiving External Applications from OUAC

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## 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.

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## Pre-Loading OUAC Data

This section discusses how to pre-load OUAC data.

### Page Used to Pre-Load OUAC Data

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
OUAC Pre Load Parms (OUAC pre load parameters)	OUAC_PRELOAD_PARMS	<b>Student Admissions &gt; OUAC &gt; Processes &gt; Pre Load Data Process</b>	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 Params page. You can find definitions for the fields and controls later on this page.

### OUAC Pre Load Params

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

Path/Name- Input/Output Files	
<b>Input File:</b>	<input type="text" value="n:\user\canada\newtest\ug085.udi"/>
<b>Output Des:</b>	<input type="text" value="n:\user\canada\newtest\outug085.udi"/>

<i>Field or Control</i>	<i>Description</i>
<b>Input File</b>	Enter the full path and name of the OUAC file that you want to process.
<b>Output Des</b> (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.

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## 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*

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## 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	<b>Student Admissions &gt; OUAC &gt; Processes &gt; Load OUAC Data</b>	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	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U</b>	Review and edit OUAC transaction data.
OUAC A2/U2	OUAC_A2_U2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A2/U2</b>	Review and edit OUAC transaction data.
OUAC A3/U3	OUAC_A3_U3_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A3/U3</b>	Review and edit OUAC transaction data.
OUAC A4/U4	OUAC_A4_U4_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A4/U4</b>	Review and edit OUAC transaction data.
OUAC A5/U5	OUAC_A5_U5_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A5/U5</b>	Review and edit OUAC transaction data.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
OUAC A6/U6	OUAC_A6_U6_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A6/U6</b>	Review and edit OUAC transaction data.
OUAC A7/U7	OUAC_A7_U7_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A7/U7</b>	Review and edit OUAC transaction data.
OUAC A8/U8	OUAC_A8_U8_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A8/U8</b>	Review and edit OUAC transaction data.
OUAC A9/U9	OUAC_A9_U9_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC A9/U9</b>	Review and edit OUAC transaction data.
OUAC AR	OUAC_AR_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC AR</b>	Review and edit OUAC transaction data.

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
OUAC B5	OUAC_B5_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions A/U &gt; OUAC B5</b>	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	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E</b>	Review and edit OUAC transaction data.
OUAC B2	OUAC_B2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC B2</b>	Review and edit OUAC transaction data.
OUAC B7/V7	OUAC_B7_V7_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC B7/V7</b>	Review and edit OUAC transaction data.
OUAC B8/V8	OUAC_B8_V8_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC B8/V8</b>	Review and edit OUAC transaction data.
OUAC B9/V9	OUAC_B9_V9_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC B9/V9</b>	Review and edit OUAC transaction data.
OUAC C1	OUAC_C1_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC C1</b>	Review and edit OUAC transaction data.
OUAC C2	OUAC_C2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC C2</b>	Review and edit OUAC transaction data.
OUAC D1	OUAC_D1_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC D1</b>	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	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions B/V - E &gt; OUAC E1</b>	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	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions F</b>	Review and edit OUAC transaction data.
OUAC F2	OUAC_F2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions F &gt; OUAC F2</b>	Review and edit OUAC transaction data.
OUAC F3	OUAC_F3_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions F &gt; OUAC F3</b>	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	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H</b>	Review and edit OUAC transaction data.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
OUAC G2/H2	OUAC_G2_H2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H &gt; OUAC G2/H2</b>	Review and edit OUAC transaction data.
OUAC G3/H3	OUAC_G3_H3_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H &gt; OUAC G3/H3</b>	Review and edit OUAC transaction data.
OUAC G4/H4	OUAC_G4_H4_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H &gt; OUAC G4/H4</b>	Review and edit OUAC transaction data.
OUAC G5/H5	OUAC_G5_H5_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H &gt; OUAC G5/H5</b>	Review and edit OUAC transaction data.
OUAC G6/H6	OUAC_G6_H6_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H &gt; OUAC G6/H6</b>	Review and edit OUAC transaction data.
OUAC G7/H7	OUAC_G7_H7_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H &gt; OUAC G7/H7</b>	Review and edit OUAC transaction data.
OUAC G8/H8	OUAC_G8_H8_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions G/H &gt; OUAC G8/H8</b>	Review and edit OUAC transaction data.

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
OUAC J/K	OUAC_J_K_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC J/K</b>	Review and edit OUAC transaction data.
OUAC J1/K1	OUAC_J1_K1_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC J1/K1</b>	Review and edit OUAC transaction data.
OUAC J2/K2	OUAC_J2_K2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC J2/K2</b>	Review and edit OUAC transaction data.
OUAC J3/K3	OUAC_J3_K3_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC J3/K3</b>	Review and edit OUAC transaction data.
OUAC J4/K4	OUAC_J4_K4_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC J4/K4</b>	Review and edit OUAC transaction data.
OUAC J5/K5	OUAC_J5_K5_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC J5/K5</b>	Review and edit OUAC transaction data.
OUAC L1/N1	OUAC_L1_N1_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC L1/N1</b>	Review and edit OUAC transaction data.
OUAC M1	OUAC_M1_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC M1</b>	Review and edit OUAC transaction data.
OUAC M2	OUAC_M2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction J - N &gt; OUAC M2</b>	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	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction P- R</b>	Review and edit OUAC transaction data.
OUAC R/S	OUAC_R_S_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction P- R &gt; OUAC R/S</b>	Review and edit OUAC transaction data.
OUAC R1/S1	OUAC_R1_S1_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction P- R &gt; OUAC R1/S1</b>	Review and edit OUAC transaction data.
OUAC R2/S2	OUAC_R2_S2_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction P- R &gt; OUAC R2/S2</b>	Review and edit OUAC transaction data.
OUAC R3/S3	OUAC_R3_S3_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction P- R &gt; OUAC R3/S3</b>	Review and edit OUAC transaction data.
OUAC R4/S4	OUAC_R4_S4_PNL	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transaction P- R &gt; OUAC R4/S4</b>	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	<b>Student Admissions &gt; OUAC &gt; Transactions &gt; Transactions T1</b>	Review and edit OUAC transaction data.

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## 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	<b>Student Admissions &gt; OUAC &gt; Processes &gt; Suspense Data</b>	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 Suspend page. You can find definitions for the fields and controls later on this page.

### OUAC Suspend

**Trans ID:** OUAC\_UAS\_ADD    **OUAC Identifier:** A4    **OUAC Process Status:** Suspense

**OUAC Ref#:** 20000041720    **OUAC Appl. Nbr.:** 02    **OUAC Dist. Nbr.:** 14

**Suspend Data**

**Search/Match Processing Option:** Complete ▾    **OUAC Process Status:** Suspense ▾

**ID:**     **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:**  ▾

<i>Field or Control</i>	<i>Description</i>
<b>Search/Match Processing Option</b>	<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>
<b>OUAC Process Status</b>	<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>
<b>ID</b>	<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 <b>Matches</b> 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_PARMS	<b>Student Admissions &gt; OUAC &gt; Processes &gt; Post OUAC Data &gt; OUAC Post Parms</b>	Define default values for admit type, application center, academic career, and campus.
OUAC Post Parms2 (OUAC post parameters2)	OUAC_POST_PARMS2	<b>Student Admissions &gt; OUAC &gt; Processes &gt; Post OUAC Data &gt; OUAC Post Parms2</b>	Define application and transcript posting defaults.
OUAC Post Parms BC (OUAC post parameters BC)	OUAC_POST_PARMS_BC	<b>Student Admissions &gt; OUAC &gt; Processes &gt; Post OUAC Data &gt; OUAC Post Parms BC</b>	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](#) Run

	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"/>

<b>Field or Control</b>	<b>Description</b>
<b>Admit Type</b>	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.
<b>Application Center</b>	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.
<b>Academic Career</b>	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.
<b>Campus</b>	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**).

<b>Field or Control</b>	<b>Description</b>
<b>Notification Plan</b>	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> .
<b>Application Method</b>	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).
<b>Fee Type</b>	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> .
<b>Default Admit Term</b>	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.
<b>Acad Load</b> (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.
<b>Acad Level</b> (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.
<b>Degree Date</b>	Select a default degree date for OUAC transactions that transmit degree information without a degree date. <b>Degree Date</b> is a required field in PeopleSoft applications.
<b>Grade Input</b>	Enter a default grade for OUAC transactions that transmit courses without a grade. <i>Grade</i> is a required field in PeopleSoft applications.
<b>Transcript Status</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Data Source</b>	Select a default data source for the transcript status in this row of data.
<b>Data Medium</b>	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**).

<i>Field or Control</i>	<i>Description</i>
<b>School % Crse Trans Stat</b> (school % course translate status)	Assign a transcript status to the final percentage assigned by the school.
<b>Prov. Exam % Trans Stat</b> (province exam % translate status)	Assign a transcript status to the exam percentage assigned by the province.
<b>Prov. Blended % Trans Stat</b> (province blended % translate status)	Assign a transcript status to the blended percentage.
<b>Prov Interim % Trans Stat</b> (province interim % translate status)	Assign a transcript status to the interim percentage assigned by the school.
<b>BC Honours Category</b>	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.

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## 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	<b>Student Admissions &gt; OUAC &gt; Processes &gt; OUAC Messages</b>	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.

The screenshot shows the 'OUAC Process Message Table' interface. At the top, there are navigation buttons: 'Find | View All', 'First', '1 of 1', and 'Last'. Below this, several search fields are visible: 'Instance:' with a value of '1', 'Institution:' with 'PSUNV', 'ID:' with '0002', and 'Appl Nbr:' with '00022502'. There are also fields for 'OUAC Ref#:', 'OUAC Appl. Nbr.:', and 'OUAC Identifier:'. A 'Get Results' button is located to the right of the 'OUAC Identifier:' field. Below these search fields, there are sections for 'Process Instance:', 'Application Nbr:', 'ID:', 'OUAC Ref#:', 'OUAC Appl. Nbr.:', 'OUAC Identifier:', 'User ID:', 'Run Date/Time:', 'Message Severity:', 'Message Set:', and 'Message Nbr:'. At the bottom, there are two large text input areas for 'Message Text:' and 'Description:', and a label '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	<b>Student Admissions &gt; OUAC &gt; OUAC Application</b>	View overflow OUAC application data.
OUAC Law Application Data	OUAC_APPL_DATA_LAW	<b>Student Admissions &gt; OUAC &gt; OUAC Application &gt; OUAC Law Application Data</b>	Review overflow OUAC law application data.
OUAC Appl Law Cat (OUAC application law category)	OUAC_APPL_LAW_CAT	<b>Student Admissions &gt; OUAC &gt; OUAC Application &gt; OUAC Appl Law Cat</b>	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.

The screenshot shows the 'OUAC Application Data' page for Chadwick Forde (0022). The 'Academic Career' is Undergraduate and the 'Application Nbr' is 00024160. The 'Application Data' section includes fields for OUAC Ref# (20000041720), OUAC Release (Yes), Adv Std Program, Cntry Eng Sch (CAN), Yrs Eng School (13), Postsecondary (No), Admit Basis (110), Adv Std Year, CEGEP Code, and Yrs in High Sch (5). The 'OUAC Choice' section shows OUAC Appl. Nbr. (02), OUAC Choice (2), Prog Nbr. (0 ED), and 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			
<b>Application Data</b>					
OUAC Ref#:	20000041720	Offer Date:	02/07/2005	Law Fee Waiver Received <input type="checkbox"/>	
Attended Law:	Not Report	Emerg Auth.:	Not Report	Withdrawn Law: 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"/>
<b>All OLSAS Applications</b>					
Osgoode:	Active	Ottawa:	Active	Queen's:	Withdrawn
Toronto:	Active	Western:		Windsor:	

## 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			
<b>Application Data</b>					
OUAC Ref#:	20000041720				
OUAC Category 1:	<input type="text"/>	Status:	<input type="checkbox"/>	OUAC Category 2:	<input type="text"/>
OUAC Category 3:	<input type="text"/>	Status:	<input type="checkbox"/>	OUAC Category 4:	<input type="text"/>
OUAC Category 5:	<input type="text"/>	Status:	<input type="checkbox"/>	OUAC Category 6:	<input type="text"/>
OUAC Category 7:	<input type="text"/>	Status:	<input type="checkbox"/>	OUAC Category 8:	<input type="text"/>

# (GBR) Managing UCAS and Teacher Training Applications

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## Understanding UCAS 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 XML-Link interface which participating institutions can use 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 UCAS to import full-time undergraduate (FTUG) applications, process the imported applications, and send back the admission decision details to UCAS.

For more information, see [www.ucas.ac.uk](http://www.ucas.ac.uk).

To import and process UCAS applications:

1. Set up options, including the authentication details to connect 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*.

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.

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.

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## Common Elements Used to Manage UCAS and Teacher Training Applications

<b>Field or Control</b>	<b>Description</b>
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.
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.



<b>Field or Control</b>	<b>Description</b>
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.

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## Preparing for UCAS and Teacher Training Data Processing

Before you can import and process UCAS 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.
- Setting Up UCAS and teacher training options.
- Set up UCAS and Apply application import defaults.
- Set up UCAS decision approval options.
- Set up UCAS program action reasons.
- Set up Apply program action reasons.
- Configure the processing of imported HESA data.
- Set up UCAS program action reasons for Confirmation and Clearing.
- Map application statuses to program actions and reasons for Apply applications.
- Set up outcomes for enquiries and notes.
- Map UCAS attendance types.
- Map UCAS gender.
- Map UCAS 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 Teacher Training Data Processing

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
SA Features	SCC_INSTALL_SA2	<b>Set Up SACR &gt; Install &gt; Student Admin Installation &gt; SA Features</b>	Enable the UK-specific fields on the Campus Solutions pages for all institutions.
Academic Institution 6	SSR_INST_FEATURES	<b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Institution Table &gt; Academic Institution 6</b>	Enable the UK-specific fields on the Campus Solutions pages for a specific institution.
Program Action Reason Table	PROG_RSN_TBL	<b>Set Up SACR &gt; Product Related &gt; Student Records &gt; Program Action &gt; Program Action Reason Table</b>	Set up program action reasons for UCAS.  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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Application Center	ADM_APPLCTR_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Applicants &gt; Application Center Table</b>	Set up the application centers for UCAS 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; UCAS Configuration</b>	For an institution, configure system and interface setup options.
UCAS Application Import	SAD_UC_CONFIG2	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; UCAS Application Import</b>	For an institution, set up the default values that the import process uses to create the Campus Solutions application records for the choice data.
Apply Import	SAD_UC_GT_CONFIG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; Apply Import</b>	For an institution, set up the default values that the import process uses to create the Campus Solutions application records for the Apply application data.
UCAS Decision Approval	SAD_UC_DECN_SETUP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; UCAS Decision Approval</b>	Indicate whether approval is required for UCAS application, Confirmation, and Release into Clearing decisions.
UCAS Program Actions	SAD_UC_UPRG_SETUP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; UCAS Program Actions</b>	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.
UCAS Confirmation	SAD_UC_CONF_SETUP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; UCAS Confirmation</b>	Define the program actions and reason values that the system uses for UCAS Confirmation, and Clearing.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Apply Program Actions	SAD_UC_AP_SETUP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; Apply Program Actions</b>	Map application statuses to program actions and reasons for Apply applications.
HESA Data Import	SAD_UC_HESAIM_SETUP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; UCAS Configuration &gt; HESA Data Import</b>	Configure the processing of imported HESA data.
Outcome Codes	SAD_UC_OUTCMCDS	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Outcome Code</b>	Define the outcome codes that you can use to classify applicant enquiries and application notes.
Attendance Type	SAD_UC_ATTTYPEM	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Attendance Type</b>	Map UCAS attendance types to Campus Solutions academic levels. The system uses this mapping when you import Education data to create Campus Solutions external education records.
Entry Year	SAD_UC_ENTRYYRM	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Entry Year</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Entry Point</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Gender	SAD_UC_GENDMP_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Gender</b>	Map UCAS gender codes to the equivalent Campus Solutions Gender code used in UCAS and CTM records.
Home	SAD_UC_HOME	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Home</b>	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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Title</b>	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, Apply Defaults	SAD_UC_USR_DEFAULT	<b>Set Up SACR &gt; User Defaults &gt; UCAS, Apply Defaults</b>	Set up user defaults that aid in data entry and search.
External System	SCC_EXT_SYS_TBL	<b>Setup SACR &gt; Product Related &gt; Campus Community &gt; Define Campus Community &gt; Set Up &gt; Define External Systems</b>	Specify the external systems for UCAS and Apply applicants.
National ID Type Table	NID_TYPE_TABLE	<b>Set Up Common Objects &gt; Foundation Tables &gt; Personal &gt; National ID Type</b>	Assign UCASID 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.

The screenshot shows the 'Program Action Reason Table' interface. At the top, it displays 'SetID: PSUNV', 'Program Action: ADMT Admit', and 'Action Reason: CONF'. Below this is a search bar with 'Find | View All' and 'First 1 of 1 Last'. The main form contains the following fields:

- \*Effective Date:** 03/11/2011 (with a calendar icon)
- \*Status:** Active (with a dropdown arrow)
- \*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.

<b>Field or Control</b>	<b>Description</b>
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.

- 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 x (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > 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.

<b>UCAS Configuration</b>	UCAS Application Import	Apply Import	UCAS Decision Approval	UCAS Program Actions
Academic Institution		PSGBR		
PeopleSoft University UK				
*Institution Code		Z80		
*Cycle		2023		
<b>Application Import</b>				
*Default Marital Status:		Single		
Default Admin Function		<input type="text"/>		
<input checked="" type="checkbox"/> Update Matriculated Students				
<b>System Setup</b>				
Database Link		UCAS		
<input checked="" type="checkbox"/> UCAS	<input checked="" type="checkbox"/> Create CAS Records			
<input type="checkbox"/> UTT	<input type="checkbox"/> Campus Used			
<input checked="" type="checkbox"/> Import Live	<input type="checkbox"/> Disable Decision Link			
<input checked="" type="checkbox"/> Unit Results	<input type="checkbox"/> HRMS Decision Approver			
<input checked="" type="checkbox"/> Unicode	<input checked="" type="checkbox"/> Contextual Data			
<input type="checkbox"/> Use XML for Applicants				
<input type="checkbox"/> Use XML for Decisions				
<input type="checkbox"/> Use XML for Reference				
XML-Link User ID		<input type="text"/>		
XML-Link Password		<input type="text"/>		

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.

<b>Apply Setup</b>	
<input checked="" type="checkbox"/> Use Apply	<input type="checkbox"/> Default Decision Maker
Attribution Name	Amy Admissions
Attribution Email	admissions@psgbr.ac.uk
Attribution User ID	AADMSS
Authentication Token	<input type="text"/>
<b>Address Usage</b>	
*Correspondence Address Type	MAIL  Mailing
*Home Address Type	HOME  Home
*Telephone Type	HOME  Home
*Mobile phone Type	CELL  Mobile
*Email Type	Home
<b>Confirmation Enquiry</b>	
<input type="checkbox"/> Automatic Save	
<input type="checkbox"/> Outcome Required	



<b>Field or Control</b>	<b>Description</b>
<b>Institution Code</b>	Enter the institution code that UCAS supplied to your institution. The same institution code is used for Apply applications.
<b>Cycle</b>	Enter the admission cycle for which you want to import data.  You must enter the new cycle value when UCAS makes applications for the new cycle available through XML-link. The system uses this value to determine which new fields must be imported.

## Application Import

<b>Field or Control</b>	<b>Description</b>
<b>Update Matriculated Students</b>	<p>Select if you want the system to automatically update person records of matriculated students when you import UCAS person data and Apply candidate details.</p> <p>If you don't select this check box, the system doesn't 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 application choice (personal ID of 1091003101 and Application Code UC02) that has a corresponding application record with a <code>PROG_ACTION = MATR</code>. 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 data. If you haven't selected the check box, the system will not update the personal record with the imported 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.</p>
<b>Default Marital Status</b>	Select the default marital status value that the system should assign to the imported applicant records.

<b>Field or Control</b>	<b>Description</b>
<b>Default Admin Function</b>	<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 don't 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

<b>Field or Control</b>	<b>Description</b>
<b>Database Link</b>	<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 <b>Database Link</b> 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>
<b>UCAS</b>	<p>Select if you want to import UCAS applicant and application data.</p> <p>If you don't select this check box, the import process doesn't load the UCAS data into the Campus Solutions tables.</p>
<b>UTT</b>	<hr/> <p><b>Note:</b> UCAS decommissioned UTT at the end of the 2021 cycle.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Import Live</b>	<p>Select if you want to import live data from UCAS or Apply into the Campus Solutions tables through the staging tables. UCAS data that contains errors will remain in the staging table.</p> <p>If you don't 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>
<b>Unit Results</b>	Select if you want to import unit grade results of your applicants from ApplicantUnits.
<b>Unicode</b>	Select if you want to import data from the Unicode version of applicant data.
<b>Create CAS Records</b>	<p>Select if you want the import process to automatically create a CAS record for a Campus Solutions application when the applicant's record has a Visa Required value of <i>Y</i>.</p> <p>See <a href="#">Understanding PBI Data Exchange</a></p>
<b>Campus Used</b>	<p>Select if you have multiple institution campuses for UCAS admissions. Otherwise, don't select if you have a single institution campus for UCAS admissions.</p> <p>This check box indicates whether or not the UCAS Campus field is used by your institution. If the UCAS Campus field isn't 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>
<b>Disable Decision Link</b>	Select to disable the Decision Entry link on the UCAS Applicant Summary page (Student Admissions, UCAS Processing, UCAS Applications, UCAS Applicant Summary), and the UCAS Application Notes page (Student Admissions, UCAS Processing, UCAS Application Notes).

<b>Field or Control</b>	<b>Description</b>
<b>HRMS Decision Approver</b>	Select if you want the Approver and Decision Maker lookups to display person IDs from PeopleSoft HCM (HRMS) records (EMPLEE_NAME_VW).  If you don't select this check box, the Approver and Decision Maker lookups display person IDs from only the People records (PEOPLE_SRCH).
<b>Contextual Data</b>	Select if you want to import Contextual Data (ContextualData and ApplicantContextualData).
<b>Use XML for Applicants</b>	Select to import applicants through XML-link.
<b>Use XML for Decisions</b>	Select to send transactions to UCAS through XML-link.
<b>Use XML for Reference</b>	Select to load reference data through XML-link.
<b>XML-Link User ID</b>  <b>XML-Link Password</b>	Enter your user ID and password for XML-link requests.  If there's a UCAS encryption profile ID defined on the SA Features page, then the encrypted value of the password is saved. Otherwise, the unencrypted value is displayed here and then saved.  To update an encrypted value, clear the field, then enter a password". The value will be saved and masked on this page.  For information on the SA Features page, see "Selecting Country-Specific Features and Enabling CRM for Higher Education Feature" (Campus Solutions Application Fundamentals).

**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)
- *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.

<b>Field or Control</b>	<b>Description</b>
<b>Use Apply</b>	Select to enable the Apply check box on the Import Applicant Data page.  Selecting this also makes the Apply Import page appear.
<b>Default Decision Maker</b>	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 isn't selected. If this isn't selected or the person entering the decision doesn't have an ID, the Default Maker field defaults to blank.
<b>Attribution Name</b>	The value here is used to populate attribution.full_name in the meta key of POST requests.
<b>Attribution Email</b>	The value here is used to populate attribution.email in the meta key of POST requests.
<b>Attribution User ID</b>	The value here is used to populate attribution.user_id in the meta key of POST requests.
<b>Authentication Token</b>	The value here is used to populate the authorization token in each request header.  If there's an Apply encryption profile ID defined on the SA Features page, then the encrypted value of the password is saved. Otherwise, the unencrypted value is displayed here and then saved.  To update an encrypted value, clear the field, then enter a token. The value will be saved and masked on this page.

## Address Usage

The system uses these values when it imports applicant address data from ivStarA and ivgStarA views.

<b>Field or Control</b>	<b>Description</b>
<b>Correspondence Address Type</b>	Select the address type that you want the import process to assign to the imported UCAS correspondence addresses and to the Apply candidate address.

<b>Field or Control</b>	<b>Description</b>
<b>Home Address Type</b>	Select the address type that you want the import process to assign to the imported UCAS home addresses.  The home and correspondence address values must be different.
<b>Telephone Type</b>	Select the phone type that you want the import process to assign to the imported UCAS and Apply telephone numbers.
<b>Mobile Phone Type</b>	Select the phone type that you want the import process to assign to the imported UCAS mobile phone numbers.
<b>Email Type</b>	Select the email type that you want the import process to assign to the imported UCAS 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.

<b>Field or Control</b>	<b>Description</b>
Automatic Save	Select to have the system automatically save the record once you have entered the mandatory values on the UCAS Confirmation Enquiries page.  If you do not select this check box, you will need to click the Save button on the UCAS Confirmation Enquiries page, after entering the mandatory values.
Outcome Required	Select to make the Action Required and Outcome Codes fields mandatory to save a Notes record on the UCAS Confirmation Enquiries page. If you do not select this check box, the Action Required and Outcome Codes fields become optional fields.

## Setting Up UCAS Application Import Defaults

Access the UCAS Application Import page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > UCAS Application Import**).

When you import choice 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 choices.

<b>Field or Control</b>	<b>Description</b>
<b>Initial Action Reason</b>	<p>Enter the default action reason that you want the import process to assign to the Campus Solutions application records related to the imported choices.</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 <a href="#">Setting Up Admissions Program Actions and Program Action Reasons</a></p>
<b>Admit Type</b>	<p>Enter the admit type that you want the import process to assign to the Campus Solutions application records related to the imported choices.</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 choices.</p>
<b>Academic Level</b>	<p>Select the default academic level that you want the import process to assign to the Campus Solutions application records related to the imported choices. 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>

<b>Field or Control</b>	<b>Description</b>
<b>Application Center</b>	<p>Select the default application center that you want the import process to assign to the Campus Solutions application records related to the imported choices. 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 choice is associated.</p> <p>See <a href="#">Setting Up Application Processing Centers</a></p> <p>See “Setting Security for Application Centers” (Campus Solutions Application Fundamentals)</p>
<b>Application Fee Type</b>	<p>Select the application fee type that you want the import process to assign to the Campus Solutions application records related to the imported choices. Values for this field are delivered with your system as translate values.</p>
<b>Application Method</b>	<p>Select the application method that you want the import process to assign to the Campus Solutions application records related to the imported choices. Values for this field are delivered with your system as translate values.</p>
<b>Housing Interest</b>	<p>Set the value to be used when the Home value isn't mapped.</p>
<b>Campus</b>	<p>Enter the default campus that you want the import process to assign to the Campus Solutions application records related to the imported choices. 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.</p>
<b>UCAS Course Code</b>	<p>Enter the default course code that you want the import process to assign to the imported choices. The import process assigns the default value only to imported applications that do not have a course code.</p>
<b>Earliest Application Year</b>	<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 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>



<b>Field or Control</b>	<b>Description</b>
<b>Previous Name Type</b>	<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 imported Forenames and Previous Surname values.</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 <b>Set Up Common Objects &gt; Foundation Tables &gt; Personal &gt; Name Type</b>.</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 choice data. The values *Full time*, *Part time*, and *Regular* are delivered with your system as translate values.

## Setting Up Apply Application Import Defaults

Access the Apply Import page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > Apply Import**).

This page appears when you select **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 Apply applications.

<b>Field or Control</b>	<b>Description</b>
<b>Initial Action Reason</b>	<p><b>Note:</b> This field isn't considered in Apply applications. For Apply, the initial action reason is defined in Apply Program Actions.</p>
<b>Admit Type</b>	<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 Apply Import page matches the career with which the application data is associated.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Academic Level</b>	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.
<b>Application Center</b>	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 Apply Course page.  Define the application processing centers in the Application Center Table page. If you have defined an application center for a career, ensure that the application center selected in the Apply Import page matches the career with which the application data is associated.
<b>Application Fee Type</b>	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.
<b>Application Method</b>	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.
<b>Campus</b>	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 Apply Course page.
<b>Housing Interest</b>	If you define a value here, it's used as the default for new Apply applications. Otherwise, this is set to blank in the applications.
<b>Notification Plan</b>	If you define a value here, it's used to override the default value Regular Admission Decision (REG) for new Apply applications.

**Note:** For Apply applications, if the academic load isn't 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 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.

<span>UTT Decision Approval</span> <span><b>UCAS Program Actions</b></span> <span>UIT Program Actions</span> <span>UCAS Confirmation</span> <span>UTT Confirmation</span>				
Academic Institution:		PSGBR	PeopleSoft University UK	
Institution Decisions				
	Program Action		Action Reason	
*Conditional Offer:	<input type="checkbox"/> APPL Application		<input type="checkbox"/> COND	Conditional Offer
*Amended Conditional Offer:	<input type="checkbox"/> APPL Application		<input type="checkbox"/> ACND	Amended Conditional Offer
*Unconditional Offer:	<input type="checkbox"/> APPL Application		<input type="checkbox"/> UNCD	Unconditional Offer
*Amended Unconditional Offer:	<input type="checkbox"/> APPL Application		<input type="checkbox"/> AUNC	Amended Unconditional Offer
*Rejection:	<input type="checkbox"/> DENY Deny		<input type="checkbox"/> REJN	Rejection
*Amended Rejection:	<input type="checkbox"/> DENY Deny		<input type="checkbox"/> AREJ	Amended Rejection
*Interview:	<input type="checkbox"/> APPL Application		<input type="checkbox"/> INTV	Interview
*Amended Interview:	<input type="checkbox"/> APPL Application		<input type="checkbox"/> AINT	Amended Interview
*Course Full:	<input type="checkbox"/> DENY Deny		<input type="checkbox"/> CRFL	Course Full
*Amended Course Full:	<input type="checkbox"/> DENY Deny		<input type="checkbox"/> ACFL	Amended Course Full
*Withdrawal:	<input type="checkbox"/> WAPP Applicant Withdrawal		<input type="checkbox"/> WDRV	Withdrawal
*Amended Withdrawal:	<input type="checkbox"/> WAPP Applicant Withdrawal		<input type="checkbox"/> AWDW	Amended Withdrawal
*UF Withdrawal - Institution:	<input type="checkbox"/> WADM Administrative Withdrawal		<input type="checkbox"/> UFWI	UF Withdrawal - Institution
*UF Amendment:	<input type="checkbox"/> ADMT Admit		<input type="checkbox"/> UFAM	UF Amendment
*Course Correction:	<input type="checkbox"/> PRGC Program Change		<input type="checkbox"/> 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.

<b><i>Program Action and Action Reason Values For</i></b>	<b><i>Used by the System When</i></b>
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:

<b><i>Program Action and Action Reason Values For</i></b>	<b><i>Used by the System When</i></b>
Conditional Firm	The applicant replies for the first time by accepting a conditional offer firmly.
Cond Firm – Upgraded	The applicant changes his or her reply from Conditional Insurance to Conditional Firm prior to confirmation.  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.
Conditional Insurance	The applicant replies for the first time by accepting a conditional offer as insurance.
Cond Insurance – Downgraded	The applicant changes his or her reply from Conditional Firm to Conditional Insurance.  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.
Unconditional Firm	The applicant replies for the first time by accepting an unconditional offer firmly.
Uncond Firm – Upgraded	The applicant changes his or her reply from Unconditional Insurance to Unconditional Firm prior to confirmation.  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.
Unconditional Insurance	The applicant replies for the first time by accepting an unconditional offer as insurance.
Uncond Insurance – Downgraded	The applicant changes his or her reply from Unconditional Firm to Unconditional Insurance.  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.

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
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 isn't D).

## UCAS Amendments

The system uses the **UCAS Amendments** group box values when UCAS initiates changes and you import these changes. The following table describes when the system uses the program action and reason values for the UCAS amendments:

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
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, the value of the <b>Reply</b> field is <i>CNC</i> .
Withdrawal - UCAS	UCAS either notifies that the applicant has withdrawn all application choices (the value of the <b>Withdrawn</b> field is <i>C</i> ) or applicant has withdrawn only one choice (the value of <b>Decision</b> 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 application (the value of the <b>Decision</b> field is <i>W</i> ).
Withdrawal Re-instated	UCAS notifies that a previously withdrawn application choice can be considered by the institution. The system uses the <b>Withdrawal Re-instated</b> field values when UCAS changes the decision value to blank from <i>W</i> .

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
Reject by Default	UCAS rejects the application because your institution did not communicate any decision to UCAS (the <b>Action</b> field is <i>R</i> ).
Decline by Default	UCAS declines an offer because the applicant did not reply (the <b>Action</b> field is <i>D</i> ).  Note that if the <b>Action</b> 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 Reply value.

The following scenario shows how Campus Solutions uses the values set up on the UCAS Program Actions page:

1. On the UCAS Program Actions page, for the Rejection decision enter a program action of *DENY* and an action reason of *R*.
2. Enter a decision of *Rejection* for a UCAS application on the Initial Decision Entry page. If approval is required, use the UCAS Decision Approval page to approve the Rejection decision.
3. Select the **Generate Transaction** check box on the Transaction Processing page and run the Transaction Processing Application Engine (SAD\_UC\_TRAN) process to generate a transaction for the Rejection decision.
4. The system sets the program action to *DENY* and the action reason to *R* in the Campus Solutions application record of the corresponding UCAS application number.

## Setting Up 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.

*Application Status	Description	*Program Action	Description	Action Reason	Description
1 awaiting_provider_decisio	New	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 offer_deferred	Offer Deferred	APPL	Application	DEFR	Deferred Offer
6 pending_conditions	Accepted	APPL	Application	OFAC	Offer Accepted
7 recruited	Conditions met	ADMT	Admit	CNMT	Conditions Met
8 rejected	Rejected	DENY	Deny	REJN	Rejection
9 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

[Processing UCAS Reference Data](#)

## Configuring the Processing of Imported HESA Data

Access the HESA Data Import page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > UCAS Configuration > HESA Data Import**).

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

The screenshot shows the 'HESA Data Import' configuration page. At the top, there are navigation tabs: UCAS Configuration, UCAS Application Import, Apply Import, UCAS Decision Approval, UCAS Program Actions, UCAS Confirmation, Apply Program Actions, and HESA Data Import. Below the tabs, there are several controls:

- Process Mismatched Applicants
- Import SCN
- Import ULN
- Import Entry Qualifications
- SCN Update Option: Add/Update (dropdown)
- ULN Update Option: Add/Update (dropdown)

The main section is a table titled 'HESA Fields' with columns: Staging Field, Long Description, Import, HESA Record, HESA Field, and Update Option. The table lists 16 fields with their respective configurations.

Staging Field	Long Description	Import	HESA Record	HESA Field	Update Option
1 SAD_UC_APR	Area of Permanent Residency	<input checked="" type="checkbox"/>	Entry Profile	PERMADDCOUNTRY	Add if Blank
2 SAD_UC_CARELEAVER	Care Leaver	<input type="checkbox"/>	Entry Profile	CARELEAVERE	Add/Update
3 SAD_UC_CARER	Caring responsibilities	<input checked="" type="checkbox"/>	Person	CARER	Add if Blank
4 SAD_UC_DISABLE	Disability Code	<input type="checkbox"/>	Person	DISABILITY	Add/Update
5 SAD_UC ESTRANGED	Estranged	<input checked="" type="checkbox"/>	Entry Profile	ESTRANGED	Add if Blank
6 SAD_UC_ETHNIC	Ethnic Code	<input checked="" type="checkbox"/>	Person	ETHNICS	Add/Update
7 SAD_UC NATIONALITY	Nationality	<input checked="" type="checkbox"/>	Person	NATION	Add if Blank
8 SAD_UC_PARED	Parental Education	<input type="checkbox"/>	Entry Profile	PAREDE	Add/Update
9 SAD_UC_POCC2020	Parental Occupation 2020	<input checked="" type="checkbox"/>	Entry Profile	SOC2020	Add if Blank
10 SAD_UC_POSTCODE	Postcode	<input checked="" type="checkbox"/>	Entry Profile	PERMADDPOSTCODE	Add if Blank
11 SAD_UC_PREVINST	Previous Institution	<input checked="" type="checkbox"/>	Entry Profile	PREVIOUSPROVIDER	Add/Update
12 SAD_UC_QVALENT2	Highest Qualification	<input type="checkbox"/>	Entry Profile	HIGHESTQOE	Add/Update
13 SAD_UC_RELBLF	Religion/Belief	<input checked="" type="checkbox"/>	Person	RELIGIONS	Add/Update
14 SAD_UC_SEXORT	Sexual Orientation	<input type="checkbox"/>	Person	SEXORTS	Add/Update
15 SAD_UC_SOCECO2020	Socio-Economic 2020	<input type="checkbox"/>	Entry Profile	SECE	Add/Update
16 SAD_UC_YRLLINST	School Leaving Year	<input checked="" type="checkbox"/>	Entry Profile	YRLLPROV	Add if Blank

Field or Control	Description
<b>Process Mismatched Applicants</b>	<p>The system uses this check box's setting when you import HESA data from UCAS.</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 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 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>

<b>Field or Control</b>	<b>Description</b>
<b>Import SCN</b>	By default, this check box is selected. This option determines if the SCN external system ID values are created or updated.
<b>SCN Update Option</b>	By default, <b>Add/Update</b> is selected. This is required if the Import SCN check box is selected.  If <b>Add/Update</b> is selected, a new effective-dated external ID record will be created for the imported value. If <b>Add If Blank</b> is selected, the external ID will only be created if there is no existing ID for the person.
<b>Import ULN</b>	By default, this check box is selected. This option determines if the ULN external system ID values are created or updated.
<b>ULN Update Option</b>	By default, <b>Add/Update</b> is selected. This is required if the Import ULN check box is selected.  If <b>Add/Update</b> is selected, a new effective-dated external ID record will be created for the imported value. If <b>Add If Blank</b> is selected, the external ID will only be created if there is no existing ID for the person.
<b>Import Entry Qualifications</b>	By default, this check box is selected. This option determines if entry qualifications are imported to HESA Entry Profile.

## HESA Fields

This grid enables you to control the import of individual person-level and Entry Profile fields. The records you see on this grid are as delivered and can't be deleted or added to.

In cases where the incoming value can be used for the associated Data Futures field, the **Import** check box is selected by default. Institutions can choose to **deselect Import** for any fields that they don't want to import.

<b>Field or Control</b>	<b>Description</b>
<b>Import</b>	This option is enabled or disabled for the corresponding Staging Fields as delivered. You can select or deselect the check box to control the import of individual fields.  If this check box is selected, the other values including <b>Update Option</b> are required to save the record.

<b>Field or Control</b>	<b>Description</b>
<b>HESA Field</b>	<p>You can select an alternative field for the same HESA record to import data.</p> <p>If you want to import data from the old Student return fields, you can replace the Data Futures (DF) field by the equivalent Student return field. For example, the Care Leaver HESA field can be updated from CARELEAVERE to CARELEAVER.</p>
<b>Update Option</b>	<p>This field is set to <b>Add/Update</b> by default. This field is enabled and you can update it if the <b>Import</b> check box is selected.</p> <p>If <b>Add/Update</b> is selected, any existing value for the field in the HESA record will be overwritten with the imported value.</p> <p>If <b>Add If Blank</b> is selected, the value will be added only if there is no existing value for the field in the HESA record.</p>

## Setting Up UCAS Program Action Reasons for Confirmation and Clearing

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. You can find definitions for the fields and controls later on this page.

UCAS Configuration | UCAS Application Import | Apply Import | UCAS Decision Approval | UCAS Program Actions | **UCAS Confirmation** | D

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 Confirmation 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

### 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:

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
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 choice 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>

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
Accept Insurance	The institution confirms acceptance for a conditional insurance application. That is, Decision is <i>A</i> and Reply is <i>I</i> (Insurance).  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 isn't <i>UF Elsewhere</i> , the system gets the new Program Action and Action Reason for <i>Accept Insurance</i> .
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 Confirmation	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:

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
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	<b>Note:</b> This is no longer used as Adjustment has been decommissioned by UCAS.
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, <b>Decision</b> is <i>U</i> , <b>Reply</b> is <i>F</i> , and the previous <b>Reply</b> 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, <b>Decision</b> is <i>C</i> , <b>Reply</b> is <i>F</i> , and the previous <b>Reply</b> 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 decisions:

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
Adjustment Acceptance	<b>Note:</b> This is no longer used as adjustment has been decommissioned by UCAS.
Clearing Application	You import Clearing applications and the system creates the corresponding Campus Solutions application records for the imported Clearing applications.

<b>Program Action and Action Reason Values For</b>	<b>Used by the System When</b>
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)	<b>Application source (EAS)</b> 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)

1. For Clearing Application, enter the program action *APPL* (Application) and action reason *CAP*. For Clearing Acceptance, enter the program action *ADMT* and action reason *CAC*. For Clearing rejection, enter the program action *DENY* and action reason *CR*.
2. The Import Applicant Data Application Engine (SAD\_UC\_IMPAP) process imports UCAS Clearing application records. The imported UCAS Clearing application records have a choice number of 9.
3. If the Result value 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 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 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 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 isn't D, add a new row for Clearing Acceptance.
- If the incoming Result = A and Reply is D and the Campus Solutions application isn't already withdrawn (application status isn't 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 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

\*Short Description

\*Action Required

- UCAS
- Apply
- Confirmation
- Active

<i>Field or Control</i>	<i>Description</i>
Action Required	Select a value that allows you to filter the outcome codes on the UCAS Confirmation Enquiries page, and UCAS Application Notes pages.  Values are <i>Applicant</i> , <i>Institution</i> , and <i>None</i> .
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:**  ▼

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 imported education records.

---

## Mapping UCAS 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	<input type="text"/>	<input type="text"/>

Use this page to map the admit term for UCAS and Apply choices.

<b>Field or Control</b>	<b>Description</b>
<b>Entry Year</b>	Enter the entry year in the format YYYY.
<b>Entry Month</b>	Enter a number between 1 and 12 to indicate the UCAS entry month. For example, if the month is January, enter 1.  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.

<b>Field or Control</b>	<b>Description</b>
<p><b>Entry Point</b></p>	<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><b>Note:</b> This field is hidden if System is set to Apply.</p>
<p><b>Cohort Tag</b></p>	<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 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.

### Entry Point

**Academic Institution:** PSGBR

**UCAS Entry Point:** 2

**\*Academic Level:**  ▼

**Year of Program:**  ▼

---

**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 isn't 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 isn't used in Apply admissions. Therefore, for Apply you need not map entry points with academic levels and careers. The system uses the default academic level that you defined on the Apply Import page for Apply applications.

## Mapping UCAS Genders

Access the Gender page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Gender**).

Map the UCAS gender codes to the equivalent Campus Solutions gender codes used in UCAS and CTM records.

These codes are valid only for the 2023 admissions cycle:

- F: Female
- M: Male
- U: Unknown
- X: Undisclosed

These codes will be used from the 2024 cycle onwards:

- A: I prefer to use another term
- B: Woman
- C: Man
- N: I prefer not to say

## 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*.

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**Note:** When you import UCAS application data, the system populates the mapped Campus Solutions housing interest into the related Campus Solutions application records.

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## 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.

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 isn't 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.

Define the following external systems codes listed in the following table.

<b>External System Code</b>	<b>Description</b>
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, Apply 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 for user 'Locherty, Betty'. The page is organized into several sections:

- Institution Defaults:** Contains a search field for 'Academic Institution'.
- UCAS Defaults:** Contains search fields for 'UCAS Course', 'UCAS Campus', and 'Offer'; text input fields for 'UCAS Entry Year', 'Decision Maker', and 'Approver'; and a dropdown menu for 'Decision'.
- Apply Defaults:** Contains search fields for 'Provider Code', 'Apply Course', and 'Decision Maker'; and a text input field for 'Entry Year'.
- UTT Defaults:** Contains search fields for 'UTT Course', 'UTT Campus', and 'Offer'; text input fields for 'UTT Entry Year', 'UTT Decision Maker', and 'Approver'; and a dropdown menu for 'Decision'.

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 isn't 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.

*NID Type	Default	*Description	Short Desc	National ID Format	NID as stored		
GTTRID	<input type="checkbox"/>	UTT Personal ID	UTTPERID	9999999999	9999999999	<input type="checkbox"/>	<input type="checkbox"/>
PR	<input type="checkbox"/>	National Insurance Number	NINO	AA999999	AA999999	<input type="checkbox"/>	<input type="checkbox"/>
PR_9	<input checked="" type="checkbox"/>	Nat Ins Num (9 Chars)	NINO	AA999999A	AA999999A	<input type="checkbox"/>	<input type="checkbox"/>
TEMP	<input type="checkbox"/>	Temp National Insurance Numb	NINO	AA999999	AA999999	<input type="checkbox"/>	<input type="checkbox"/>
TEMP_9	<input type="checkbox"/>	Temp NI Number (9 Chars)	NINO	AA999999A	AA999999A	<input type="checkbox"/>	<input type="checkbox"/>
UCASID	<input type="checkbox"/>	UCAS Personal ID	UCASPER	9999999999	9999999999	<input type="checkbox"/>	<input type="checkbox"/>

<b>NID Type (maximum 6 characters)</b>	<b>Default</b>	<b>Description (maximum 30 characters)</b>	<b>Short Desc (maximum 10 characters)</b>	<b>National ID Format (maximum 20 characters)</b>
UCASID	No	UCAS Personal ID	UCASPERID	9999999999 (10 digits)
APPLID	No	Apply Candidate ID	APPLID	XXXXXXXXXX (10 characters)

The Import Applicant Data process uses the UCASID and APPLID NID types to import UCAS 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](#)
- [Create Course Records for a New Admissions Cycle](#)

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**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 were for UTT applications.

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### Pages Used to Set Up Teacher Training Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Statuses	SAD_U_APPLSTAT_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Application Statuses</b>	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.
Apply Course Rollover	SAD_UC_ACRSEROV	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Apply Course Rollover</b>	Create Apply course records and associated mapping for a new admissions cycle.  Once you've copied the course mapping records to the new cycle, you can delete any records that aren't required using the Courses page.
Conditions	SAD_UC_APPLY_COND	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Conditions</b>	Define individual conditions you can apply to applications.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Courses	SAD_UC_ACOURSE_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Courses</b>	Manually add Apply course data to your database. Also, map a course with a Campus Solutions academic career, program, plan, application center, and campus.
Disability Mapping	SAD_UC_DISABMP_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Disability Mapping</b>	Map HESA disability codes to a disability or type of impairment to create or update person disability records.  For 95, you have the option to map to a disability or impairment of "No disability" (a distinction between applicants that answer "No" and those that "Prefer not to say"). Or you can also leave the mapping blank and not create impairment records.
Entry Year Mapping	SAD_UC_ENTRYYRM	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Entry Year Mapping</b>	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)
Ethnicity Mapping	SAD_UC_ETHNC_MP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Ethnicity Mapping</b>	Map HESA ethnicity codes to a set ID, regulatory region, and ethnic group.
Gender Mapping	SAD_UC_GENDR_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Gender Mapping</b>	Map HESA gender codes to sex codes in person records.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Institutions	SAD_UC_INST	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Institutions</b>	View the imported cvInstitution data or manually enter the UCAS institution data into your database.  For Apply, indicate schools for which you are the accredited provider.
Offers	SAD_UC_APPLY_OFFER	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Offers</b>	Define groups of conditions you can apply to applications.
Rejection Reasons	SAD_UC_APPLY_REJN	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Rejection Reasons</b>	Define the text for rejecting applications.
Residency Mapping	SAD_UC_RESID_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Apply Setup &gt; Residency Mapping</b>	(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.  <hr/> <b>Note:</b> The Residential Category for UCAS isn't used for Apply applications. <hr/>

## Defining Individual Conditions for Applications

Access the Conditions page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > 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 Courses page. You can also apply these conditions to the offers you define on the Offers page. See [Reviewing and Mapping Apply Courses](#).

To create a condition, click **Add New Value**, then provide values for:

<b>Field or Control</b>	<b>Description</b>
<b>Academic Institution</b>	Enter your institution. By default, this value is set to the user’s default institution.
<b>Condition Code</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Cycle</b>	The value here is the most recent course record that's being considered.  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.

## Defining Condition Groups

Access the Offers page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > 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 | 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 Courses mapping.

To create a group of conditions, click **Add New Value**, then provide values for:

<b>Field or Control</b>	<b>Description</b>
<b>Academic Institution</b>	Enter your institution. By default, this value is set to the user's default institution.
<b>Offer Code</b>	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 Courses.

## 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.

<i>Field or Control</i>	<i>Description</i>
<b>Description</b>	Enter a description for the offer. The maximum length is 30 characters.
<b>Default</b>	By default, this is not selected. Only one record can be set as the default offer.  You can select this check box only if no other offer is set as the default.

## 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 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

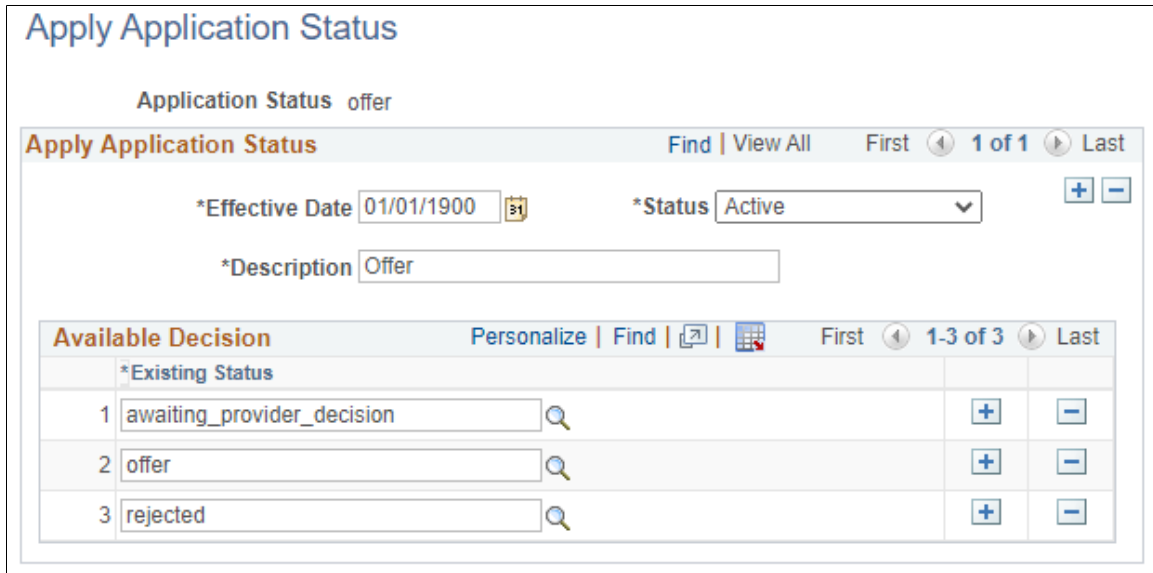
Here you see the list of courses that use this offer as the Default Offer or in Available Offers for the most recent cycle row.

<i>Field or Control</i>	<i>Description</i>
<b>Cycle</b>	The value here is the most recent course record that's being considered.  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.
<b>Default</b>	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 Application Statuses page (Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Application Statuses).

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.



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.

<b>Field or Control</b>	<b>Description</b>
<p><b>Existing Status</b></p>	<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.

<b>Application Status</b>	<b>Existing Status</b>
Offer	<ul style="list-style-type: none"> <li>• New (awaiting_provider_decision)</li> <li>• Offer (offer)</li> <li>• Rejected (rejected)</li> <li>• Offer Deferred (offer_deferred)</li> </ul> <p>You can add a decision of <i>Offer</i> (with or without conditions) for applications that were deferred from a previous cycle where the application's existing status is offer_deferred and the offer is now being confirmed in the new cycle.</p> <p>Conditions are not required to save a decision of <i>Offer</i>. If conditions are not defined when confirming a deferred offer, the conditions_met value will be sent as true and the application will be re-imported with status set to "Conditions met" (recruited). If conditions are defined, the conditions_met value will be sent as false and the application will be re-imported with status set to <i>Accepted</i> (pending_conditions).</p> <p>Changes of course/location are not allowed as part of the confirmation of a deferred offer. Any details added in Course Change will not be considered for deferred offer confirmation. The confirmation is only valid if the same course, location, and study_mode combination of the original application is available in the current recruitment cycle. A manual intervention is required by the Department for Education if the original course is no longer running in the new cycle and the provider wants to confirm an offer for a different course.</p> <p>A new offer decision can be sent to change the course once the application has been confirmed in the new cycle.</p> <hr/> <p><b>Note:</b> You shouldn't add an offer for a deferred application until the offer can be confirmed in the next cycle.</p> <hr/>
Rejected	<ul style="list-style-type: none"> <li>• New (awaiting_provider_decision)</li> <li>• Offer (offer)</li> </ul>
Conditions met (recruited)	Accepted (pending_conditions)
Conditions not met	Accepted (pending_conditions)
Offer Deferred	<ul style="list-style-type: none"> <li>• Accepted (pending_conditions)</li> <li>• Conditions met (recruited)</li> </ul> <p>You can defer an offer using the Apply API when the existing application status is pending_conditions or recruited. On the Apply Decisions page, add the decision <i>Offer Deferred</i>, and then send it using the Decisions Export process.</p>



<b>Application Status</b>	<b>Existing Status</b>
Withdrawn	<ul style="list-style-type: none"> <li>• New (awaiting_provider_decision)</li> <li>• Offer (offer)</li> <li>• Offer Deferred (offer_deferred)</li> <li>• Accepted (pending_conditions)</li> <li>• Conditions met (recruited)</li> </ul> <p>You can send this decision through the Apply API when the existing application status is any one of these. On the Apply Decisions page, add the decision <i>Withdrawn</i>, and then send it using the Decisions Export process.</p> <hr/> <p><b>Note:</b> This status isn't valid when the existing application status is withdrawn, declined, rejected, or conditions_not_met.</p> <hr/>

**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:

<b>Field or Control</b>	<b>Description</b>
<b>Academic Institution</b>	Enter your institution. By default, this value is set to the user's default institution.
<b>Rejection Code</b>	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 label and text are copied from the most recent row.

## Reviewing and Mapping Apply Courses

Access the Courses page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Courses**).

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   
\*Course Name   
Entry Year   
Entry Month

**Mapping**  
\*Academic Career   
\*Academic Program  PG Cert Education (Humanities)  
\*Academic Plan  Geography  
Campus   
Application Center   
Academic Load   
Cohort Tag   
Year of Program   
Default Offer

**Available Offers** Personalize | Find | First 1 of 1 Last  

Offer Code	Description
1 <input type="text"/>	

**Available Conditions** Personalize | Find | First 1 of 1 Last  

Condition Code	Condition Text
1 <input type="text"/>	

Use this page to add Apply course records with different cycles. Records with the most recent cycle appear first.

Take note of these fields:

<b>Field or Control</b>	<b>Description</b>
<b>Site Code</b>	Enter a short hyphen if the course is offered in only one location and there's no site code.
<b>Study Mode</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Cycle</b>	This field requires exactly four digits.  This represents the Recruitment Cycle Year for Apply applications.
<b>Entry Year</b>	(Optional) If you: <ul style="list-style-type: none"> <li>• 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.</li> <li>• If you don't enter a value, the Entry Year for choices is derived from <code>recruitment_cycle_year</code>.</li> </ul>
<b>Entry Month</b>	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.
<b>Default Offer</b>	Select a default offer from a list of active 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 Apply Import page.

<b>Field or Control</b>	<b>Description</b>
<b>Academic Load</b>	If you don't enter a value, then it's derived from the Study Mode of the choice.
<b>Cohort Tag</b>	If you don't enter a value, then it's derived from the Entry Year page if it's defined there.
<b>Year of Program</b>	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.

## Create Course Records for a New Admissions Cycle

Access the Apply Course Rollover page (**Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Apply Setup > Apply Course Rollover**).

Use this page to copy course mapping records to a new admissions cycle. If there are any records that aren't required, you can delete them through the Courses page.

<b>Field or Control</b>	<b>Description</b>
Provider Code	(Optional) If you provide a 3-character code, only records for that provider are created for the target cycle.
Target Cycle	The records for the target cycle are created from the previous cycle records. So if you enter 2023, the process creates records using the 2022 cycle records.

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## Processing UCAS 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 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 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.

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**Note:** For Apply applications, reference data isn't imported.

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During authentication, if **Use XML for Reference** and **Import Live** are both selected, a request is sent that checks that the combination of user ID and password is correct. If the check fails, the processing that loads data to the staging records is skipped and an error message is logged. If the check passes, the processing moves on to the individual calls to request reference data and load data to the staging records. If there's a UCAS decryption profile ID defined on the SA Features page, the stored encrypted password is decrypted for use with each request. Otherwise, the unencrypted password is used.

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 didn't 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:

Reference data is loaded to new staging records for the following XML methods if the Cycle is 2025 and the **Import Live** check box is selected on the [Import Reference Data](#) page:

- `getReferenceAddressHistoryReason`
- `getReferencePreviousStudyLevel`
- `getReferenceStudyDeliveryMode`
- `getReferenceVisaOrImmigrationStatus`

- `getReferenceNoVisaReason`

Data is loaded with reference to the internal time stamp.

- If there is no internal timestamp, the request is made with a blank *lastUpdated* parameter to load all the available records.
- If an internal timestamp record exists, either the Override Timestamp (if defined) or the Timestamp value + 1 second is used for the *lastUpdated* parameter.

Once the staging records have been loaded, the internal timestamp record is created or updated to reflect the latest timestamp value that has been loaded.

<b>Staging Table</b>	<b>Stores Data Imported From</b>
PS_SAD_UC_I_SCHCTX	cvRefSchoolContextualData or Contextual Data
PS_SAD_UC_I_INST	cvInstitution or ReferenceInstitutionUCAS
PS_SAD_UC_I_COURSE	cvCourse or UCASReferenceCourse
PS_SAD_UC_I_SCHOOL	cvSchool or ReferenceSchool
PS_SAD_UC_I_SCHCNT	cvSchoolContact or ReferenceSchoolContact
PS_SAD_UC_I_SCHTYP	cvRefSchoolType or ReferenceSchoolType
PS_SAD_UC_I_ESTGROUP	cvRefEstGroup or ReferenceEstablishGroup
PS_SAD_UC_I_APR	cvRefAPR or ReferencePermanentResidenceArea
PS_SAD_UC_I_DIS	cvRefDis or ReferenceDisability
PS_SAD_UC_I_ETHNIC	cvRefEthnic or ReferenceEthnic
PS_SAD_UC_I_RESCAT	cvRefResCat or ReferenceResidentialCategory
PS_SAD_UC_I_COUNTRY	cvRefCountry or ReferenceCountryOfBirth
PS_SAD_UC_I_NATION	cvRefNationality or ReferenceNationality
PS_SAD_UC_I_POCC	cvRefPOCC
PS_SAD_UC_I_SOCCLASS	cvRefSocialClass

<b>Staging Table</b>	<b>Stores Data Imported From</b>
PS_SAD_UC_I_SOCECO	cvRefSocioEconomic or ReferenceSocialEconomic
PS_SAD_UC_I_CARE	cvRefCare or ReferenceCareCode
PS_SAD_UC_I_PRESPN	cvRefPrepSponsor or HigherEducationActivityProvider
PS_SAD_UC_I_SCHOOLYEAR	cvRefSchoolYear
PS_SAD_UC_I_PARHE	cvRefParentinHE or ReferenceParentalHE
PS_SAD_UC_I_FEE	cvRefFee or ReferenceFeePayer
PS_SAD_UC_I_EBLSUBJ	cvEBLSubject or ReferenceABLSubject
PS_SAD_UC_I_AWARDBODY	cvRefAwardBody or ReferenceAwardingBody
PS_SAD_UC_I_EXAM	cvRefExam or ReferenceExamLevel
PS_SAD_UC_I_UNITS	cvRefUnits or ReferenceUnitGrades
PS_SAD_UC_I_OEQ	cvRefOEQ or ReferenceOtherExamQualification
PS_SAD_UC_I_COFABB	cvRefOfferAbbrev or ReferenceStandardOfferAbbrev
PS_SAD_UC_I_UOFABB	uvOfferAbbrev or ReferenceOwnOfferAbbreviation
PS_SAD_UC_I_STATUS	cvRefStatus or ReferenceApplicantStatus
PS_SAD_UC_I_OFFSUB	cvRefOfferSubj or ReferenceOfferSubject
PS_SAD_UC_I_ERROR	cvRefError or ReferenceError
PS_SAD_UC_I_CARDUR	cvRefCareDuration or ReferenceCode (InCareDuration)
PS_SAD_UC_I_TARIFF	cvRefTariff or ReferenceTariff
PS_SAD_UC_I_LEA	cvRefLea or ReferenceLocalEducationAuthority
PS_SAD_UC_I_GENIDE	cvRefGenIdenDiff or ReferenceGenIdenDiff

<b>Staging Table</b>	<b>Stores Data Imported From</b>
PS_SAD_UC_I_SEXORT	cvRefSexOrientation or ReferenceSexOrientation
PS_SAD_UC_I_RELBLF	cvRefReligionBelief or ReferenceReligionBelief
PS_SAD_UC_I_FSM	FreeSchoolMeals
PS_SAD_UC_I_HEAT	HigherEducationActivityType
PS_SAD_UC_I_RASS	RefugeeAsylumSeekerStatus
PS_SAD_UC_I_POCC20	cvRefPOCC2020 or ReferenceParentalOccupations2020
SAD_UC_I_ADHSRS	ReferenceAddressHistoryReason
SAD_UC_I_NOVSRS	ReferenceNoVisaReason
SAD_UC_I_PRSTLV	ReferencePreviousStudyLevel
SAD_UC_I_STDLMD	ReferenceStudyDeliveryMode
SAD_UC_I_VSIMST	ReferenceVisaOrImmigrationStatus

The system imports cvRefSchoolContextualData or ContextualData data only if you have selected the Contextual Data check box 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 relevant UCAS 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, the system doesn't import the data into Campus Solutions. Therefore, staging tables don't exist for these views. The Personal ID look up icon directly queries these views to display the applicant values on the UCAS Enquiry Entry page. 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).

## Loading and Processing Reference Staging Data Through XML-Link

If you selected **Use XML for Reference** on the UCAS Configuration page, the existing process loads reference data to the staging records via XML-link. As with the ODBC-link processing, if there are any existing staging records, the processing for that request is skipped and a message is logged. In XML-link, all the reference data objects have a row-level timestamp (lastUpdated) so the processing references that value for each row rather than view-level values provided in ReferenceAmendedDate (equivalent of cvRefAmendments).

When importing reference data for ABL Subject, School, School Contacts, School Contextual Data, and Units, because of the volume of records, if there is no internal timestamp record, the lastUpdated parameter is initially set to 01-JAN-YYYY, where YYYY is the configured cycle, for example, 01-JAN-2023 (if the configured cycle is 2023). If records are imported and an internal timestamp record is created, an override timestamp can then be defined to import earlier records.

For School Contextual Data, the data is only loaded if **Contextual Data** is selected for the institution on UCAS Configuration page.

## Pages Used to Process UCAS Reference Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import Reference Data	SAD_UC_IMP_REF_PRC	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Import Reference Data</b>	Import UCAS reference data into your database.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Import Reference Log	SAD_UC_IMPRFXML_CP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Import Reference Log</b>	View requests for the importing of reference data for a particular process instance. You'll see each call and the corresponding response.
UCAS Course	SAD_UC_COURSE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; UCAS Courses</b>	View the imported 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Area of Permanent Residence</b>	View the imported 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Country</b>	View the imported 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Disability</b>	View the imported 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.
Ethnicity	SAD_UC_ETHNIC	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Ethnicity</b>	View the imported 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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Exam Levels	SAD_UC_EXAM	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Exam Levels</b>	View the imported data or manually enter the UCAS exam level data into your database. Also, map the UCAS exam level to the Campus Solutions qualification type.
Nationality	SAD_UC_NATION	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Nationality</b>	View the imported 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.
Residential Category	SAD_UC_RESCAT	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; Residential Category</b>	View the imported 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.
School Type Mapping	SAD_UC_SCHTYP_MAP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Mappings &gt; School Type</b>	Map UCAS school types to the organization type, proprietorship and school type values used to create external organization records.
ABL Subject	SAD_UC_EBLSUB	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; ABL Subjects</b>	View the imported data or manually enter the UCAS ABL Subject data into your database.
Address History Reason	SAD_UC_ADHISRSN_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Address History Reason</b>	View the imported or manually added Address History Reason codes.
Applicant Status	SAD_UC_STATUS	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Applicant Status</b>	View the imported data or manually enter the UCAS status data into your database.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Awarding Body	SAD_UC_AWDBDY	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Awarding Body</b>	View the imported data or manually enter the UCAS awarding body data into your database.
Care	SAD_UC_CARE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Care</b>	View the imported data or manually enter the UCAS Care data into your database.
Delayed Confirmation Reasons	SAD_UC_DCREASON	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Delayed Confirmation Reasons</b>	View the imported data or manually enter reasons for delayed confirmation.
Error Code	SAD_UC_ERROR	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Error Code</b>	View the imported data or manually enter the UCAS Error Code data into your database.
Establishment Group	SAD_UC_ESTGRP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Establishment Group</b>	View the imported data or manually enter the UCAS establishment group data into your database.
Fee Payer	SAD_UC_FEE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Fee Payer</b>	View the imported data or manually enter the UCAS fee payer data into your database.
Free School Meals	SAD_UC_FSM	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Free School Meals</b>	View the imported data or manually enter reference data.
Gender Identity Difference	SAD_UC_GENDIDEN	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Gender Identity Difference</b>	View the imported data or manually enter the gender identity difference data into your database.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
HE Activity Provider	SAD_UC_PRESNP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; HE Activity Provider</b>	View the imported data or manually enter the UCAS sponsor data into your database.
HE Activity Types	SAD_UC_HEAT	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; HE Activity Types</b>	View the imported data or manually enter reference data.
In Care Duration	SAD_UC_CAREDUR	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; In Care Duration</b>	View the imported data or manually enter the UCAS In Care Duration data into your database.
Institution	SAD_UC_INST	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Institution</b>	View the imported data or manually enter the UCAS institution data into your database.
Institution Course Keyword	SAD_UC_CRSKEY	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Institution Course Keyword</b>	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.
Keyword	SAD_UC_KEY	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Keyword</b>	View the imported cvRefKeyword data or manually enter the UCAS keyword data into your database.
Local Education Authorities	SAD_UC_LEA	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Local Education Authorities</b>	View the imported data or manually enter the LEA codes into your database.
NHS Region	SAD_UC_REGION	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; NHS Region</b>	View the imported cvnRefRegion data or manually enter the NHS Region data into your database.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
No Visa Reason	SAD_UC_NOVISRSN_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; No Visa Reason</b>	View the imported or manually entered No Visa Reason codes.
Offer Subject	SAD_UC_OFFSUB	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Offer Subject</b>	View the imported data or manually enter the UCAS Offer Subject data into your database.
Other Exam Qualifications	SAD_UC_OEQ	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Other Exam Qualifications</b>	View the imported data or manually enter the UCAS Other Exam Qualifications data into your database.
Own Offer Abbreviation	SAD_UC_UOFABB	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Own Offer Abbreviation</b>	View the imported data or manually enter the UCAS Own Offer Abbreviation data into your database.
Parental Higher Education	SAD_UC_PARHE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Parent in Higher Education</b>	View the imported data or manually enter the UCAS Parent in Higher Education data into your database.
Parental Occupation	SAD_UC_POCC	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Parental Occupation</b>	View the imported cvRefPOCC data or manually enter the UCAS Parental Occupation data into your database.
Parental Occupation 2010	SAD_UC_POCC2010	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Parental Occupation 2010</b>	View the imported cvRefPOCC2010 data or manually enter the UCAS Parental Occupation 2010 data into your database.
Parental Occupation 2020	SAD_UC_POCC2020	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Parental Occupation 2020</b>	View the imported data or manually enter the UCAS Parental Occupation 2020 data into your database.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Previous Study Level	SAD_UC_PRVSTLVL_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Previous Study Level</b>	View the imported or manually entered Previous Study Level codes.
Refugee Asylum Seeker Status	SAD_UC_RASS	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Refugee Asylum Seeker Status</b>	View the imported data or manually enter reference data.
Religion/Belief	SAD_UC_RELBLF	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Religion/Belief</b>	View the imported data or manually enter the religion or belief data into your database.
School	SAD_UC_SCHOOL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; School</b>	View the imported School and School Contact data.  Click the External Org Details link to update or view the details of the External Organization that's mapped to the school.
School Contextual Data	SAD_UC_SCH_CTXT	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; School Contextual Data</b>	View the imported data or manually enter the School Contextual data into your database.
School Type	SAD_UC_SCHTYP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; School Type</b>	View the imported data or manually enter the UCAS school type data into your database.
School Year	SAD_UC_SCHYR	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; School Year</b>	View the imported cvRefSchoolYear data or manually enter the UCAS school year data into your database.
Sexual Orientation	SAD_UC_SEXORT	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Sexual Orientation</b>	View the imported data or manually enter the sexual orientation data into your database.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Social Class	SAD_UC_SOCCLS	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Social Class</b>	View the imported cvRefSocialClass data or manually enter the UCAS social class data into your database.
Socio Economic	SAD_UC_SOCECO	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Socio Economic</b>	View the imported data or manually enter the UCAS Socio Economic data into your database.
Standard Offer Abbreviation	SAD_UC_COFABB	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Standard Offer Abbreviation</b>	View the imported data.
Study Delivery Mode	SAD_UC_STDELMOD_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Study Delivery Mode</b>	View imported data.
Subject	SAD_UC_SUB	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Subject</b>	View the imported cvRefSubj data or manually enter the UCAS subject data into your database.
Tariff Scores	SAD_UC_TARIFF	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Tariff Scores</b>	View the imported data or manually enter the UCAS tariff data into your database.
Units	SAD_UC_UNITS	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Units</b>	View the imported data or manually enter the UCAS unit data into your database.
Visa/Immigration Status	SAD_UC_VISIMGST_PG	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Reference Data &gt; Visa/ Immigration Status</b>	View the imported or manually entered Visa/ Immigration Status codes.



<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Regional	EXT_ORG_TBL_REG	<b>Campus Community</b> > <b>Organization</b> > <b>Create/Maintain Organizations</b> > <b>Organization Table</b> > <b>Regional</b>	View the imported School data or manually enter the UCAS school data into your database.  The system enables the <b>UK UCAS School Data</b> region only if you select the <b>HESA, UCAS</b> check box on the SA Features page.

## Importing Reference Data

Access the Import Reference Data page (**Set Up SACR** > **Product Related** > **Recruiting and Admissions** > **UCAS** > **Import Reference Data**).

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.

<i>Field or Control</i>	<i>Description</i>
<b>Import Live</b>	Indicates how the Import Reference Data process loads data into the Campus Solutions tables. From this page, you can change the setting of this check box.  The default value is based on whether you selected the <b>Import Live</b> check box on the UCAS Configuration page.  If the check box is already selected (meaning it was also selected on the UCAS Configuration page), the import process loads the data into the staging tables and then into the Campus Solutions tables. Otherwise, the import process loads the data from the staging tables into the Campus Solutions tables.
<b>Academic Institution</b>	Enter the academic institution for which you want to import the data.

<b>Field or Control</b>	<b>Description</b>
<p><b>Create/Update External Org Rec</b> (create/update external organization record)</p>	<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 doesn't 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 doesn't 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>

## Related Links

[Defining a Timestamp for Reimporting Data](#)

## 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.

### UCAS Course

Academic Institution PSGBR PeopleSoft University UK  
 UCAS Institution Code Z80 SOFTA  
 UCAS Course Code B77F  
 Campus \*  
 Entry Year 2022  
 Entry Month 9

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Short Name  
 Long Name Nursing (Adult) with Foundation Year

**Mapping**

Academic Career

Academic Program

Academic Plan

Academic Sub-Plan

Application Center

Campus

Academic Load

Faculty

Joint Admission  Open Extra  Open for Clearing  
 Interview or Audition Required  Portfolio Required

Status

Start Date 09/01/2022 12:00:00AM

Age Restriction N

Course Type

Criminal Check Required

Last Updated 11/26/21 5:46:48AM

Imported  Active

**Note:** If the UCAS Campus value in cvCourse is *null* (this means the institution doesn't 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 \*.

<b>Field or Control</b>	<b>Description</b>
<b>UCAS Timestamp</b>	Displays the date and time when UCAS updated the cvCourse view.  This field is read-only and only appears for imported records. For manually added records, this field is blank and you don't need to enter a value.

### Mapping

You must map a Campus Solutions academic career, program, and plan for each combination of UCAS course code, entry year and entry month that may exist in an imported application choice. The remaining fields in the Mapping group box are optional. The system uses the mapped values when creating or updating the Campus Solutions application record related to the UCAS application choice.

If you don't 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 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 PSGBR PeopleSoft University UK  
 Disability Code 1

Description Learning difficulty

231 characters remaining

HESA Code

**Mapping**

Disability Learning ▾

Type of Impairment Learning Disability ▾

Last Updated 06/27/2009 1:31:23PM

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:  Peoplesoft University

Regulatory Region:  United Kingdom

Ethnic Group:  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

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**Description:**

**HESA Code:**

**Mapping**

**Country:**   China

**Citizenship Status:**   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.

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## Importing UCAS and Teacher Training 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 time stamp for reimporting data.

## Understanding Importing UCAS and Teacher Training 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 aren't 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.

During authentication for UCAS, if **Use XML for Applicants** and **Import Live** are both selected, a request is sent that checks that the combination of user ID and password is correct. If the check fails, the processing that loads data to the staging records is skipped and an error message is logged. If the check passes, the processing moves on to the individual calls to request applicant data and load data to the staging records. If there's a UCAS decryption profile ID defined on the SA Features page, the stored encrypted password is decrypted for use with each request. Otherwise, the unencrypted password is used.

During authentication for Apply, if **Import Live** is selected, a request is sent that checks if the authentication token is correct. If the check fails, the processing that loads data to the staging records is skipped and an error message is logged. If the check passes, a message is logged and GET Applications is then called using the same authentication token in the initial authentication check. If there's an Apply decryption profile ID defined on the SA Features page, the stored encrypted authentication token is decrypted for use with each request. Otherwise, the unencrypted authentication token is used.

The Import Applicant Data process allows data to be imported from:

- UCAS iv views (ODBC) or applicant methods (XML), if you selected **UCAS** on the UCAS Configuration page
- 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 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 time stamp.
- If Personal ID and Application Code aren't selected, records are imported to the staging tables based on the time stamp records for each system. For UCAS, internal time stamp records for each view/method are considered. For Apply, a single internal time stamp record is considered.



- If there is an internal time stamp record, records with a higher time stamp than the internal time stamp value (set on the previous run of the import) are imported unless Override time stamp is defined, in which case records with a higher time stamp than that value are imported.
- If there is no internal time stamp record, for UCAS all records are imported. For Apply, records updated since 2020-01-01T00:00:00Z are imported. At the end of the import, the internal time stamp records are updated to reflect the highest imported time stamp value.
- For XML-link processing, if an Override time stamp isn't defined, the internal time stamp value plus one second is used for the lastUpdated request parameter.

If **Import Live** isn't selected, new records aren't imported and existing staging records are re-processed based on the import options selected for UCAS and Apply.

The Import Applicant Data process imports data from the ivContextual view or Applicant Contextual Data *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/methods *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 using the Unicode methods, such as getUCASApplicantsDetails\_U and getUCASApplicantsEmployment\_U. Conversely, if you haven't selected the Unicode check box, the process imports data using the non-Unicode methods, such as getUCASApplicantsDetails and getUCASApplicantsEmployment.

You can view, update, or delete the suspended UCAS and Apply application data in the staging tables using the Staging Data pages. You can search for the suspended data based on various search parameters including import status, application code and personal ID.

The import process creates a corresponding Campus Solutions application record for each imported application choice. If an applicant has more than one ChoiceNo for an AppCode at your institution, the import process creates a separate Campus Solutions application record for each AppCode and ChoiceNo combination. You can use the Maintain Applications component to access the Campus Solutions application record. Each application record will have an effective date that indicates the date when you imported the application. If you import updates to the same application on different days, the system creates new application records with the different effective dates. If you import updates to the same application multiple times on a particular day, the system updates the Campus Solutions application record for that particular date.

The import process also creates (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 or Apply Applications components to view the imported application choice. For more information about these components, see [Reviewing Imported UCAS and Apply Applications and Applicant Data](#).

Suppose you are importing a UCAS choice and its decision value already exists in UCAS. 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:*

- 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 hasn't 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.

A new row is added based on the Decision value of the choice if during import these conditions are satisfied:

- A new row is added for any of the following: **Changed Course/Campus, Changed Term, Changed Entry Point.**
- The new Decision value isn't blank.
- Both the new and existing Reply values are blank (no subsequent Reply Change row will be added).

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 reinstated, 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.

When choices are initially imported for UCAS, 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.

The Import Applicant Data process uses the Nationality page mapping to import the passport field values and create the citizenship and passport records. If the nationality value in an imported record doesn't have a corresponding country code mapping, then the process doesn't 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 didn't map the same nationality with a citizenship status. In this case, if a citizenship record doesn't exist in Campus Solutions for the imported record, the process creates a new blank citizenship record. This means 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*.

For Dual Nationality, a similar process is used to create or update citizenship records.

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 to create or update a Primary and Preferred Name record in Campus Solutions. However, if Preferred First Name value exists, then the import process uses this value to create or update the Preferred Name record for the applicant. A Preferred First Name isn't 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 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 doesn't exist, but the School value exists 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 Teacher Training Applications and Applicant Data

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Transaction Setup	SCC_TRANSAC_DTLS	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>Transaction Setup</b>	View the delivered UCAS and Apply transactions that you can use in the Transaction Search/Match Setup page. Don't modify any values for these delivered transactions or create new ones.
Search/Match Setup	SCC_SEARCH_PARMS	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>Transaction Setup</b> > <b>Search/Match Setup</b>	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	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>Import Applicant Data</b>	Import the UCAS and Apply applicant data into your system. Before you import the data, set up the search/match parameters on the Search/Match Processing pages.
Import Applicant Log	SAD_UC_IMPAPXML_CP	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>Import Applicant Log</b>	View requests for the importing of applicant data for a particular process instance. You'll see each call and the corresponding response.
Transaction Data	SCC_TRANSAC_DATA	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>Transaction Data</b>	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	SAD_UC_I_IVCONXT	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Contextual Staging</b>	View, update, or delete the suspended Applicant Contextual data stored in the staging tables.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
UCAS Education Staging	SAD_UC_I_EDUCAT	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Education Staging</b>	View, update, or delete the suspended Applicant Education data stored in the staging tables.
UCAS Employment Staging	SAD_UC_I_IVEMPL	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Employment Staging</b>	View, update, or delete the suspended Applicant Employment data stored in the staging tables.
UCAS Qualifications Staging	SAD_UC_I_IVFMQ	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Qualifications Staging</b>	View, update, or delete the suspended Applicant Qualification data stored in the staging tables.
UCAS Choice Offer Staging	SAD_UC_I_OFFER	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Choice Offer Staging</b>	View, update, or delete the suspended Choice Offer data stored in the staging tables.
UCAS HE Activities Staging	SAD_UC_I_IVPREP	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>HE</b> <b>Activities Staging</b>	View, update, or delete the suspended Applicant HE Activities data stored in the staging tables.
UCAS Results Match Staging	SAD_UC_I_IVQUAL	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Results Match Staging</b>	View, update, or delete the suspended Results Match Status data stored in the staging tables.
UCAS Reference Staging	SAD_UC_I_IVREF	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Reference Staging</b>	View, update, or delete the suspended Applicant Referee data stored in the staging tables.
UCAS Contact Details Staging	SAD_UC_I_STARA	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Contact Details Staging</b>	View, update, or delete the suspended Applicant Detail data stored in the staging tables.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
UCAS Choices Staging	SAD_UC_I_IVSTRC	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Choices Staging</b>	View, update, or delete the suspended Applicant Choice data stored in the staging tables.
UCAS Background Staging	SAD_UC_I_IVSTH	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Background Staging</b>	View, update, or delete the suspended Applicant Background data stored in the staging tables.
UCAS HESA Staging	SAD_UC_I_IVSTJ	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>HESA Staging</b>	View, update, or delete the suspended HESA data stored in the staging tables.
UCAS Biographical Staging	SAD_UC_I_IVSTK	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Biographical Staging</b>	View, update, or delete the suspended Applicant Detail data stored in the staging tables.
UCAS Applicant Staging	SAD_UC_I_STARN	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Applicant Staging</b>	View, update, or delete the suspended Applicant Detail data stored in the staging tables.
UCAS Exam Results Staging	SAD_UC_I_IVPQR	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Exam Results Staging</b>	View, update, or delete the suspended Applicant Result data stored in the staging tables.
UCAS Cancelled Applicant Staging	SAD_UC_I_STARW	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>Cancelled Applicant Staging Data</b>	View, update, or delete the suspended Applicant Cancelled data stored in the staging tables.
UCAS StarX Staging Data	SAD_UC_I_IVSTX	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Import Applicants</b> > <b>UCAS Staging Data</b> > <b>ivStarX Staging Data</b>	View, update, or delete the suspended ivStarX data stored in the staging tables.  This staging data isn't used in XML-link processing.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
UCAS Clearing Choices Staging	SAD_UC_I_STARZ1	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; UCAS Staging Data &gt; Clearing Choices Staging</b>	View, update, or delete the suspended Clearing Choice data stored in the staging tables.
UCAS Statement Staging	SAD_UC_I_IVSTAT	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; UCAS Staging Data &gt; Statement Staging</b>	View, update, or delete the suspended Applicant Personal Statement data stored in the staging tables.
UCAS Unit Results Staging	SAD_UC_I_IVUNRS	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; UCAS Staging Data &gt; Unit Results Staging</b>	View, update, or delete the suspended Applicant Units data stored in the staging tables.
UCAS Self Release Staging	SAD_UC_I_IVASRR_CM	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; UCAS Staging Data &gt; Self Release Staging</b>	View, update, or delete the suspended Self Released Applicants data stored in the staging tables.
UCAS Widening Participation Staging	SAD_UC_I_WPDATA	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; UCAS Staging Data &gt; Widening Participation Staging</b>	View, update, or delete the Applicant Widening Participation data stored in the staging tables.
Applicant Staging	SAD_UC_I_GSTARN	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Applicant Staging</b>	View, update, or delete the suspended Apply candidate data stored in the staging tables.
Biographical Staging	SAD_UC_I_IVGSTK	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Biographical Staging</b>	View, update, or delete the suspended Apply application data stored in the staging tables.
Choices Staging	SAD_UC_I_IVSTRG	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Choices Staging</b>	View, update, or delete the suspended Apply application data stored in the staging tables.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Contact Details Staging	SAD_UC_I_GSTARA	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Contact Details Staging</b>	View, update, or delete the suspended Apply contact details data stored in the staging tables.
Offer Conditions Staging	SAD_UC_I_ACOND_PG	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Offer Conditions Staging</b>	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.
Qualifications Staging	SAD_UC_I_AQUAL_PG	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Qualifications Staging</b>	View, create, or update Apply qualifications data stored in the staging tables.
References Staging	SAD_UC_I_IVGREF	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; References Staging</b>	View, update, or delete the suspended Apply reference data stored in the staging tables.
Statement Staging	SAD_UC_I_IVGSTA	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Statement Staging</b>	View, update, or delete the suspended Apply personal statement data stored in the staging tables.
Work Experience Staging	SAD_UC_I_IVGEXP	<b>Student Admissions &gt; UCAS Processing &gt; Import Applicants &gt; Apply Staging Data &gt; Work Experience Staging</b>	View, update, or delete the suspended Apply work experience data stored in the staging tables.
Internal Timestamp	SAD_UC_TIMESTMP	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; UCAS &gt; Timestamps</b>	For an institution, reset a time stamp to a previous date if you want to re-import records. See the highest time stamp 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:**

**Transaction Description:**

**\*Transaction Status:**  ▼

**\*Data Update Rule:**  🔍

**Transaction Options**

**Online Transaction**    **Process Search/Match:**     **Batch**  
 **Realtime**     **Run on Save**

**Transaction Handler**

**\*Root Package ID:**  🔍




**\*Path:**  🔍

**\*Application Class ID:**  🔍

**Transaction Status and Date**

**\*Staged Record Name:**  🔍 **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 and Apply data. Don't 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:**   CS\_Person\_Traditional

**\*Search Result Code:**   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 <input type="button" value="v"/>	Suspend <input type="button" value="v"/>
2	20 SSN Only	Update <input type="button" value="v"/>	Suspend <input type="button" value="v"/>
3	30 Name,Bday,Gender	Suspend <input type="button" value="v"/>	Suspend <input type="button" value="v"/>
4	40 Name,Gender	Suspend <input type="button" value="v"/>	Suspend <input type="button" value="v"/>
5	50 Name Only	Suspend <input type="button" value="v"/>	Suspend <input type="button" value="v"/>

No Match Found

Add  Suspend  Ignore

The system uses this delivered *UCAS* and *Apply* transactions to process the incoming *UCAS* and *Apply* data. Therefore, you will need to define search match parameters for the *UCAS* and *Apply* transactions.

Use the **Search Parameter** field to select the group of predefined search parameters that you want to use for the Import Applicant Data process.

Use the **Search Result Field** field to select a search result value that you defined in the Search Result page.

It is recommended that you change the Number of Characters of *FirstNameSrchRule* and *LastNameSrchRule* to 7 for *PSCS\_10*, *PSCS\_30*, *PSCS\_40* and *PSCS\_50* in the Search/Match Rules page. Select **Set Up SACR > System Administration > Utilities > Search/Match > Search/Match Rules** to navigate to the Search/Match Rules page.

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)

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**Note:** You must define at least one Suffix value in the Name Suffix table (**Set Up Common Objects > Foundation Tables > Personal > Name Suffix**).

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## 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.

<b>Field or Control</b>	<b>Description</b>
<b>Search Order Nbr</b> (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.
<b>One Match</b> 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 doesn't 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 . 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  🔍

Import Live

	UCAS	UTT	Apply
Import Applicants	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Import Biographical Data	<input type="checkbox"/>	<input type="checkbox"/>	
Import Examination Results	<input type="checkbox"/>		
Import Application Choices	<input type="checkbox"/>	<input type="checkbox"/>	
Import HESA Data	<input type="checkbox"/>	<input type="checkbox"/>	

Personal ID

Application Code

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Academic Institution</b>	Enter the academic institution for which you want to import data.
<b>Import Live</b>	<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 don't 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 <b>Import Live</b> check box on the UCAS Configuration page is selected.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Import Applicants</b>	<p>Indicates whether the process imports applicant data from UCAS or Apply.</p> <p>Either one of these options can be selected, but not both.</p> <ul style="list-style-type: none"><li>• The system selects the <b>UCAS</b> check box if you selected <b>UCAS</b> or on the UCAS Configuration page.</li></ul> <p>If the system selects the <b>UCAS</b> check box, the process imports applicant data from UCAS ivStarN, ivStarA, and ivStarK views, or UCASApplicantDetail and ApplicantAnswer if <b>Use XML for Applicants</b> is selected in UCAS Configuration.</p> <ul style="list-style-type: none"><li>• When you're importing applicant data using the Apply API, select the <b>Apply</b> check box for Import Applicants.</li></ul> <hr/> <p><b>Note:</b> The <b>Apply</b> check box is enabled <i>only</i> when you select <b>Use Apply</b> on the UCAS Configuration page.</p> <hr/> <p>See <a href="#">Preparing for UCAS and Teacher Training Data Processing</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Import Biographical Data</b>	<p>Select the UCAS check box if you want to import application biographical data from the following UCAS views/XML objects:</p> <ul style="list-style-type: none"> <li>• ivStarH/UCASApplicantBackground</li> <li>• ivFormQuals/ApplicantQualification</li> <li>• ivQualification/ResultsMatchStatus</li> <li>• ivEducation/ApplicantEducation</li> <li>• ivEmployment/ApplicantEmployment</li> <li>• ivPrepActivities/ApplicantHigherEducationActivities</li> <li>• ivContextual/ApplicantContextualData</li> <li>• Widening participation data: <ul style="list-style-type: none"> <li>• ApplicantCaringResponsibilities</li> <li>• ApplicantEstrangedFromParents</li> <li>• ApplicantFreeSchoolMeals</li> <li>• ApplicantLivingWithCondition</li> <li>• ApplicantParentCarerInArmedForces</li> <li>• ApplicantParentingResponsibilities</li> <li>• ApplicantRefugeeAsylumSeekerStatus</li> <li>• ApplicantServedInArmedForces</li> </ul> </li> </ul>
<b>Import Examination Results</b>	<p>Select the UCAS check box if you want to import data from ivStarPQR and ivUnitResults views, or ApplicantResult and Applicant Units methods.</p>
<b>Import Application Choices</b>	<p>Select the UCAS check box if you want to import application choices from these UCAS views/XML objects:</p> <ul style="list-style-type: none"> <li>• ivStarC/UCASApplicantChoice</li> <li>• ivStarW/UCASApplicantCancelled</li> <li>• ivReference/UCASApplicantReferee</li> <li>• ivStatement/ApplicantPersonalStatement</li> <li>• ivOffer</li> <li>• ivStarZ1</li> <li>• ivAppSelfReleasedReport/SelfReleasedApplicants</li> </ul>





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 applicant 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 isn't found, then the Import Applicant Data process invokes the Constituent Transaction Management (CTM) 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 for a previous cycle with a different App Code.
  - b. Applicant record for the other system (that's, 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's, UC for UCAS 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's, GT for UCAS 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 XML objects and the various staging and base records in Campus Solutions.

- Import Applicants

<b>odbc-link View</b>	<b>XML-Link Object</b>	<b>Staging Record</b>	<b>Record</b>
ivStarN	UCASApplicantDetail	SAD_UC_I_STARN	SAD_UC_APPLREC
ivStarA	UCASApplicantDetail	SAD_UC_I_STARA	SAD_UC_APPLREC
ivStarK	UCASApplicantDetail, ApplicantAnswer (for NMCPin)	SAD_UC_I_IVSTK	SAD_UC_IVSTK

- Import Biographic Data

<b>odbc-link View</b>	<b>XML-Link Object</b>	<b>Staging Record</b>	<b>Record</b>
ivContextual	ApplicantContextualData	SAD_UC_I_IVCNTX	SAD_UC_IVCONTXT
ivEducation	ApplicantEducation	SAD_UC_I_EDUCAT	SAD_UC_EDUCAT
ivEmployment	ApplicantEmployment	SAD_UC_I_IVEMPL	SAD_UC_IVEMPL
ivFormQuals	ApplicantQualification	SAD_UC_I_IVFMQ	SAD_UC_FRMQUAL
ivQualification	ResultsMatchStatus	SAD_UC_I_IVQUAL	SAD_UC_IVQUAL
ivPrepActivities	ApplicantHigherEducationActivities	SAD_UC_I_IVPREP	SAD_UC_IVPREP
ivStarH	UCASApplicantBackground	SAD_UC_I_IVSTH	SAD_UC_IVSTH
N/A	ApplicantCaringResponsibilities ApplicantEstrangedFromParents ApplicantFreeSchoolMeals ApplicantLivingWithCondition ApplicantParentCarerInArmedForces ApplicantParentingResponsibilities ApplicantRefugeeAsylumSeekerStatus ApplicantServedInArmedForces	SAD_UC_I_WPDATA	SAD_UC_WPDATA

<b>odbc-link View</b>	<b>XML-Link Object</b>	<b>Staging Record</b>	<b>Record</b>
ivStarX	N/A	SAD_UC_I_IVSTX	SAD_UC_IVSTX

- Import Choices

<b>odbc-link View</b>	<b>XML-Link Object</b>	<b>Staging Record</b>	<b>Record</b>
ivAppSelfReleasedReport	SelfReleasedApplicants	SAD_UC_I_IVASRR	SAD_UC_IVASRR
ivStarZ1	UCASApplicantChoice (for clearing choices)	SAD_UC_I_STARZ1	SAD_UC_IVSTARC
ivStarC	UCASApplicantChoice	SAD_UC_I_IVSTRC	SAD_UC_IVSTARC SAD_UC_OTH_CH
ivOffer	UCASApplicantChoice (for conditions)	SAD_UC_I_OFFER	SAD_UC_OFFER SAD_UC_OTH_OFF
ivReference	UCASApplicantReferee	SAD_UC_I_IVREF	SAD_UC_REFERENC
ivStatement	ApplicantPersonalStatement	SAD_UC_I_IVSTAT	SAD_UC_STATEMNT
ivStarW	UCASApplicantCancelled	SAD_UC_I_STARW	SAD_UC_STARW

- Import Exam Results

<b>odbc-link View</b>	<b>XML-link Object</b>	<b>Staging Record</b>	<b>Record</b>
ivStarPQR	ApplicantResult	SAD_UC_I_IVPQR	SAD_UC_FRMQUAL
ivUnitResults	ApplicantUnits	SAD_UC_I_IVUNRS	SAD_UC_IVUNRS

- Import HESA Data

<b><i>odbc-link View</i></b>	<b><i>XML-Link Object</i></b>	<b><i>Staging Record</i></b>	<b><i>Record</i></b>
ivStarJ	UCASHesaData	SAD_UC_I_IVSTJ	SCC_HE_PERSON SCC_HE_QUAL_ENT SCC_HE_INST_FLD SAD_UC_POCC2010
ivStarJ	UCASHesaData	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.

<b><i>Data</i></b>	<b><i>Staging Record</i></b>	<b><i>Record</i></b>
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

## Importing HESA Data

A subprocess is called by the Import Applicant Data process that imports HESA reporting data from UCAS when the UCAS 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, either the UCAS view ivStarJ (via odbc-link) or UCASHesaData (via XML-link) is imported to the staging table then processed.

The following tables are loaded if this subprocess is selected:

<i>UCAS View/XML Object</i>	<i>Staging Table</i>	<i>Base Table</i>
IVSTARJ/ivStarJU UCASHESAData	PS_SAD_UC_I_IVSTJ	<ul style="list-style-type: none"> <li>Person HESA Data (PS_SCC_HE_PERSON, PS_SCC_HE_PER_FLD)</li> <li>HESA Instance Data (PS_SSR_HE_INSTANCE, PS_SSR_HE_INST_FLD, PS_SSR_HE_QUAL_ENT)</li> <li>External System ID</li> </ul>

### 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 are controlled by the fields on the HESA Data Import tab on the UCAS Configuration page.

For more information about the UCAS Configuration page, see [Setting Up UCAS and Teacher Training Options](#).

### Prerequisites

For a successful run of the 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).

### 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 into the relevant staging table based on the time stamp value of each record. If the

time stamp is greater than the internal time stamp for the view, then the record is imported. At the end of the Import Applicant Data process, the internal time stamp is updated with the highest time stamp 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 isn't found, then the EMPLID is selected from matching External System ID records with ID type UC.
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 doesn't 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*. doesn't 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 doesn't match person record").
3. Person HESA Data Update: If a Person HESA Data record exists, then fields are added or updated using the incoming values (see table below). The inserts/updates are done depending on the configuration values for each Staging Field on the UCAS Configuration page. Each staging field value is validated against active codes for the HESA Field defined in UCAS Configuration.
4. External System ID (SCN/ULN):
  - If the Import check box is selected, external System ID records are created or updated based on the imported value and the selected Update Option. For Add/Update, a new effective-dated external ID record is created for the imported value. For Add If Blank, a new external ID is only created if there is no existing ID for the person.
  - Blank staging values and default values that are 999999999 for SCN and 999999999 for ULN aren't processed.
  - 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 values (see table below) and inserts/updates are done depending on the configuration values for each Staging Field on the UCAS Configuration page. Each staging field value is validated against active codes for the HESA Field defined in UCAS Configuration.
6. HESA Instance – Entry Profile Data - Entry Qualifications Update

If the **Import Entry Qualifications** check box is selected, the individual field values are validated against active codes for the corresponding HESA 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

- Records with errors (*E*) and pending records (*P*) are retained in the staging table and can be reprocessed once errors are corrected.

## Data Mapping

The following table shows the Person Data mapping:

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>Compared with (Page name - Field name)</b>
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
Gender	Gender (1 = Male or 2 = Female)	SAD_UC_GENDER	Biographical Details – Gender

The following table shows the HESA Person Data mapping:

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>PS_SCC_HE_PER_FLD</b>
Carer	HESA Carer code. Validated against the imported HESA codes for HESA Field defined in UCAS Configuration.	SAD_UC_CARER	CARER

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>PS_SCC_HE_PER_FLD</b>
Disable	<p>HESA Disability code. Validated against imported HESA codes for the HESA Field defined in UCAS Configuration. (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 which the system will have used to create person Disability/Impairment records.</p>	SAD_UC_DISABLE	DISABILITY
Ethnic	<p>HESA Ethnicity code. Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.</p> <p>Your institution may have already imported Ethnic values which the system will have used to create person Ethnicity records.</p>	SAD_UC_ETHNIC	ETHNICS
Nation	<p>HESA country code. Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.</p> <p>Your institution may have already imported Nationality values which the system will have used to create person Citizenship records.</p>	SAD_UC_NATIONALITY	NATION



<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>PS_SCC_HE_PER_FLD</b>
ReligiousBelief	2-digit code.  Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.	SAD_UC_RELBLF	ReligiousBelief
SexualOrientation	2-digit code.  Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.	SAD_UC_SEXORT	SexualOrientation

The following table shows the External System ID mapping:

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>Base Table — Column</b>
SCN	Scottish Candidate Number (default is 999999999).  Your institution may have already imported SCN values which the system will have used to create SCN external system ID records. The system doesn't use the default value 999999999.	SAD_UC_SCN	External System ID – SCN
ULN	Unique Learner Number (default is 9999999999).  Your institution may have already imported ULN values which the system will have used to create ULN external system ID records. The system doesn't use the default value 9999999999.	SAD_UC_ULN	External System ID – ULN

The following table shows the data mapping for HESA Entry Profile:

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>HESA Base Table: PS_ SSR_HE_INST_FLD</b>
CareLeaver	Value of 04 indicates if an applicant has been in care for more than 3 months.  Value of 05 indicates if an applicant has been in care for less than 3 months, otherwise 99.	SAD_UC_CARELEAVER	CARELEAVER
Domicile	HESA country code  Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.  Your institution may have already imported APR which the system will have used to create person Residency Self-Report records.	SAD_UC_APR	PERMADDCOUNTRY
Estranged	Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.	SAD_UC ESTRANGED	ESTRANGED
ParEd	Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.	SAD_UC_PARENTINHE	PAREDE
Postcode	No validation applied.	SAD_UC_POSTCODE	PERMADDPOSTCODE
Previnst	No validation applied.	SAD_UC_PRVINST	PREVIOUSPROVIDER
Qualent3	Validated against imported HESA codes for the HESA Field defined in UCAS Configuration.	SAD_UC_QUALENT2	HIGHESTQOE

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>HESA Base Table: PS_ SSR_HE_INST_FLD</b>
Sec2020	Socio-Economic classification (ReferenceSocialEconomic). For applications up to 2021 cycle these aren't populated For applications from 2022 onwards these are populated using the value from SOC 2020 data.	SAD_UC_SOCECO2020	SECE
Soc2020	For applications up to 2021 cycle these aren't populated For applications from 2022 onwards these are populated using the value from SOC 2020 data.	SAD_UC_POCC2020	SOC2020
Yrllinst	No validation applied.	SAD_UC_YRLLINST	YRLLPROV

The following table shows the data mapping for Entry Qualifications:

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>HESA Base Table: PS_ SSR_HE_QUAL_ENT</b>
QualType1 – 30	Validated against imported HESA codes for QUALTYPEID.	SAD_UC_QUALTYPE1 to 30	SSR_HE_QUAL_TYPE
QualSbj1 – 30	Validated against imported HESA codes for SUBJECTID.	SAD_UC_QUALSBJ1 to 30	SSR_HE_QUAL_SUBJ
QualSit1 – 30	S (Summer) or W (Winter). Validated against translate values for SSR_HE_QUAL_SIT.	SAD_UC_QUALSIT1 to 30	SSR_HE_QUAL_SIT
QualGrade1 – 30	Validated against imported HESA codes for ENTRYQUALAWARDRESULT.	SAD_UC_QUALGRADE1 to 30	SSR_HE_QUAL_GRADE

<b>UCAS Value</b>	<b>Comment/Format</b>	<b>Staging Table Column: PS_SAD_UC_I_IVSTJ</b>	<b>HESA Base Table: PS_SSR_HE_QUAL_ENT</b>
QualYear1 – 30	4-digit Year value. No validation applied.	SAD_UC_QUALYEAR1 to 30	SSR_HE_QUAL_YEAR

## Reviewing and Editing the Suspended Data

Access the Transaction Data page (**Student Admissions > UCAS Processing > Import Applicants > Transaction Data**).

<b>Field or Control</b>	<b>Description</b>
<b>Personal ID</b>	Displays the value imported from the StarN staging record for suspended records and from PS_SAD_UC_APPLREC for updated or added records.
<b>Previous Surname</b>	Displays the value from the StarN staging record for suspended records.  This field doesn't 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.

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**Note:** To resolve the “First Name is required” error:

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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 aren't 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 doesn't 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.

<b>Field or Control</b>	<b>Description</b>
<b>Add</b>	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.
<b>Update</b>	Click to match to an existing record and update the person record selected in the <b>Select a Duplicate</b> region with data from the UCAS record.
<b>Additional Information</b>	Click to access: <ul style="list-style-type: none"> <li>• <b>Person Organization Summary.</b> When you click this link, the Person Organization Summary component opens in a new window, similar to Integrated Search Results.</li> <li>• <b>Relations with Institution</b></li> </ul>

### National ID

National ID staging records are created for UCAS 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 HESA Staging

Academic Institution PSGBR PeopleSoft University UK  
 Personal Id 1111111111  
 Application Code UC01

Details
Find | View All First 1 of 1 Last

**Import Status** Error (E) **Timestamp** 10/12/2022 12:00:00AM

Surname

Forenames

Date of Birth   Gender

Nationality  Primary National Identity

Ethnic Code  Disability Code

Scottish Candidate Number  Unique Learner Number

School Leaving Year  Highest Qualification

Postcode  Previous Institution

Domicile  Welsh Bacc Adv Dip

Parental Education  Care Leaver

Parental Occupation 2010  Socio-Economic 2010

Parental Occupation 2020  Socio-Economic 2020

Religion/Belief  Sexual Orientation

Caring Responsibilities  Estranged

Entry Qualifications					
Line Number	Type	Subject	Year	Sitting	Grade
1	A	A23	2015	S	A*
2	A	A40	2015	S	B
3	A	A91	2015	S	C
4	AS	B11	2015	S	A
5	AS	B13	2015	S	A
6	IB	B14	2016	W	Am
7	IB	B23	2016	W	A
8	IB	B40	2016	W	A
9	IB	C11	2016	W	A
10	IB	C33	2016	W	B

The Import Status field displays any one of the following values:

- *Error*: If the Import Applicant Data process can't 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 hasn't 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 Contact Details Staging search page, the Country Code search field searches both the Correspondence Country and the Home Country values. 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.

The staging data pages can display data from either the Unicode or non-Unicode views or objects. For example, if you have selected the Unicode check box on the UCAS Configuration page, the Contact Details Data page displays the data returned by getUCASApplicantsDetails\_U. Conversely, if you haven't selected the Unicode check box on the UCAS Configuration page, the Contact Details Staging Data displays the data returned by data returned by getUCASApplicantsDetails.

## Defining a Timestamp for Reimporting 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**

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Academic Institution PSGBR    PeopleSoft University UK

---

System UCAS

View Applicant Background

Timestamp 10/15/21 1:49:28AM

Override Timestamp

Last Run Timestamp

Records Added 4587

Records Amended

Records Deleted

<b>Field or Control</b>	<b>Description</b>
<b>Timestamp</b>	Displays the highest UCAS time stamp for the view when it was last imported.
<b>Override</b>	Specify an override date if you want to reload a particular view. After specifying the override date, run the import process. For odbc, the import process then imports the UCAS view records that have a time stamp of on and after the specified override date. For XML, the import process then imports records from the XML object where lastUpdated is on or after the specified override date. The default system time for the specified override date is 00:00:00.  After the import process finishes, the system sets the <b>Override</b> field value to blank.
<b>Last Run time stamp</b>	Displays the latest time stamp used by the import process when it was last run.
<b>Records Added</b>	Displays the number of records that the import process added when the process last ran.



<b>Field or Control</b>	<b>Description</b>
<b>Records Amended</b>	Displays the number of records that the import process modified when the process last ran.
<b>Records Deleted</b>	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 time stamps up to and including July 31, 2008. Therefore, the **Timestamp** field on the Internal time stamp 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 time stamp 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 time stamp** field as *May 31, 2008* because May 31, 2008 was the override time stamp date that the system used when the process was run.
5. The Internal time stamp 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 time stamp page still displays the date *July 31, 2008* if no records were found in the UCAS view with time stamps greater than July 31. If the import process imported records in the UCAS view that had a time stamp of August 1, 2008, then the **Timestamp** field displays the date *August 1, 2008*.

### Add a New Value

Use the Internal Timestamps - Add a New Value page to manually add timestamp records especially if you only want to import recent updates and not the full data set. If you need to, you can also set the timestamp to a future date to prevent any records from being imported.

When you manually add records, the **Timestamp** is editable, while the **Override Timestamp** field is display-only. Once you've saved the record, **Timestamp** becomes display-only and **Override Timestamp** is editable.

To enter a timestamp value, you must use this format: DD/MM/YY HH:MM:SS or MM/DD/YY HH:MM:SS (depending on the date format settings in My Preferences).

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## Reviewing Imported UCAS and Apply 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 Apply Applications and Applicant Data

After you load the UCAS applicant data into the Campus Solutions tables, use the UCAS Applications and Apply Applications components to review the imported applications and applicant data. Refer to the XML-link Technical Manual for information about the fields displayed on the UCAS Applications components.

These components also enable you to view and maintain the Campus Solutions admission application record for the imported UCAS 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 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 component 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 application. If a decision record does exist for the UCAS application, the system displays the Decision Processing page.

For more information about the initial decision entry and decision processing pages for UCAS, see [Processing Imported UCAS and Apply 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 for that person ID.

See “Understanding Service Indicators” (Campus Community Fundamentals)

Note that UCAS application search pages enforce application center security. The system restricts the search results on the UCAS 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 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 application pages and the Maintain Applications component.

## Pages Used to Review Imported UCAS and Apply Applications and Applicant Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
UCAS Applicant Summary	SAD_UC_APPL	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; UCAS Applicant Summary</b>	View the imported UCAS applicant record. View a summary of the application choices for your institution, application status, and applicant biographical details.
Choices	SAD_UC_CHOICE_DTL	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Choices</b>	View the applicant's imported application choices and the related Campus Solutions application records.
Statements	SAD_UC_STATEMENTS	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Statements</b>	View the applicant's imported personal statement data.
References	SAD_UC_REFERENCES	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; References</b>	View the applicant's imported reference data.
Qualifications	SAD_UC_FRMQUAL	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Qualifications</b>	View the applicant's imported qualification and examination results data.
Unit Results	SAD_UC_IVUNRS_SP	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Qualifications &gt; Subject Detail &gt; Unit Results</b>	View the applicant's imported unit results data.
Qualification Summary	SAD_UC_QUAL_SUMM	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Qualification Summary</b>	View the applicant's imported results match status and related biographical data.
Education	SAD_UC_EDUCAT	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Education</b>	View the applicant's imported education data.
Employment	SAD_UC_IVEMPL	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Employment</b>	View the applicant's imported employment data.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Addresses	SAD_UC_ADRHST_PG	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Addresses</b>	View the applicant's imported address records.
Preparatory Activities	SAD_UC_IVPREP	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; Preparatory Activities</b>	View the applicant's imported HE activities data.
HESA Data	SAD_UC_HESA_DTL	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Applications &gt; HESA Data</b>	View the applicant's imported HESA details.
Application Program Data	ADM_APPL_PROG_ENT	Click the <b>Maintain Applications</b> link on the UCAS Applicant Summary page.  <b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application Program Data</b>	View or edit the Campus Solutions program and plan data pertaining to the imported application.
External Education	SAD_EXT_EDUCATION	<b>Records and Enrollments &gt; Transfer Credit Evaluation &gt; External Education</b>	View the applicant's school information. The imported school record includes the attendance type (academic load).
Apply Application	SAD_UC_APPL_PG	<b>Student Admissions &gt; UCAS Processing &gt; Apply Applications &gt;</b>	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													
Name Ycdnzrez Aaabq			ID 24861			Date of Birth 09/09/1996							
Academic Institution PSGBR			PeopleSoft University UK										
Personal Id 4001994838			Personal Information										
Application Code UC01			Application Year 2024										
<b>Application Status</b>													
Application Date 10/24/2023			<input type="checkbox"/> Late Application			<input type="checkbox"/> Choices All Transparent							
Withdrawn Not Withdrawn			Withdrawn Date										
Status 10			Referred										
Extra Status			Last Updated 10/24/2023 2:44:39PM										
EAS Applied through Apply			Fee Level										
<b>Choices</b>													
										Personalize   Find		First Last	
Choice Number	UCAS Course	UCAS Course Name	UCAS Campus	Entry Year	Entry Month	Entry Point	Decision	Reply	Choice Details	Maintain Applications	Decision Entry		
1	1 H60F	BSc/EEWFD	*	2024	9	1			Choice Details	00086186	Decision Entry		
<b>Other Institution Choices</b>													
										Personalize   Find   View All		First 1 of 1 Last	
Choice Number	Institution Code	Institution Name	UCAS Course	Entry Year	Entry Month	Entry Point	Decision	Reply	Summary Condition	Offer Text			
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 00100			Apply Online Overseas			Last Education					
Fee Payer 01			Private finance								
Residential Category 9			Other								
UK Entry Date			Settled or Pre-Settled								
Previous Visa Study No			Settled Expiry Date								
Previous Study Level											
Previous Study Start Date			Previous Study End Date								
Student Visa Required No											
No Visa Reason											
Other No Visa Reason											
Visa/Immigration Status											
Other Visa Status											
Visa Start Date			Visa End Date								
Worked/Lived in EU Prefer not to say			Parent/Spouse EU Don't know								
Domicile (APR) 003			County Antrim								
Nationality 000			UK national			Country of Birth 000			United Kingdom		
Passport Number						Dual Nationality					
Place Issued											
Issue Date						Expiration Date					
Disability A			No disability						<input type="checkbox"/> Criminal Records Declared		
Criminal Conviction											
Special Needs											
Support Arrangements											
Unavailable											
Preferred First Name Afzal			Previous Surname Candler								
Nominee Name			Nominee Relationship								
Diploma Taking Progression Diploma											
Cambridge PreU											
Principal Learning											

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 XXXXXXXXXXXXXXXX01A

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.

<b>Field</b>	<b>Description</b>
<b>Late Application</b>	The system selects this check box if the value from ivStarK is L or if the value from UCASApplicantDetail is Y.
<b>Criminal Record Declared</b>	The system selects this 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 Applications** | 3C/Attachments

ID	0202	Date of Birth	11/22/1968
First Name	Shannon	<a href="#">Personal Information</a>	
Last Name	Schiller	Cycle	2022
Academic Institution	PeopleSoft University UK	Last Update	03/15/2022 12:10:43AM
Candidate ID	C25810		
Reference	AP4976		
Application ID	35749		

[Expand All](#) [Collapse All](#)

**Application** Find | View All | First **1 of 1** Last

Effective Date	04/08/2022	Application Status	Rejected
Provider	ORC Oracle University	Site Code	C
Course Code	G305 Primary with English	Application Phase	apply_1
Study Mode	full_time	Entry Month	10
Entry Year	2022	CAS Details(0)	
Application Number	00025161 <a href="#">Maintain Applications</a>	Reject by Default	03/14/2022
Submitted	01/04/2022	Withdrawn	
Last Update	03/15/2022 12:10:43AM	Withdrawn Date	
Offer Date		Offer Declined Date	
Offer Accepted Date		Deferred To Cycle	
Offer Deferred Date		Rejection Date	03/15/2022
Status Before Deferral			
Recruited Date			
Rejection Reason	Not entered		

[Notes](#)

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.

<b>Contact</b>	
Email Address	shannon.schiller3408@example.com
Phone Number	07486 120995
Address Line 1	491 Myles Junctions
Address Line 2	
Address Line 3	South Lashonstad
Address Line 4	England
Postcode	GL7 0YQ
Country	United Kingdom
<b>Candidate</b>	
Nationality	United Kingdom
Dual Nationality	United States
Domicile	England
UK Residency Code	A
Fee Payer	02 SLC,SAAS,NIBd,EU,ChI,JoM
UK Residency Status	UK Citizen
Interview Preferences	Sed recusandae accusamus. Pariatur quam sit. Qui vel voluptates. Ullam quo facere. Sed neque placea.
English Main Language	No
English Language Qualification	Qui sed dolores. Sapiente impedit dolorem. Consequatur ipsa vel. Sit quae temporibus. Enim veritatis aut. Sequi maxime non. Repudiandae deserunt exercitationem. Quia eveniet aut. Quia qui hic. Hic ut.
Disability Disclosure	Quo labore et. Dolorem omnis officia. Unde et non. Assumenda iste et. Aut aut est. Nesciunt autem dolorum. Consectetur adipisci et. Officia ratione ipsa. Sed atque dolores. Quidem nesciunt quia. Rem sint est. Iste earum a. Rerum ea quia. Voluptatem officii dolores. Consequatur corporis rerum. Vel .
Safeguarding Status	no_safeguarding_issues_to_declare
Safeguarding Details	
Further Information	Accusamus et veniam. Repellat nesciunt alias. Velit adipisci eveniet. Nulla veniam incidunt. Voluptatem porro quis. Nostrum et sint. Voluptatem ut velit. Et aliquid dignissimos. Rerum sint non. Nihil ut distinctio. Aut fugit unde. Voluptatem ducimus magni. Voluptas est est. Quaerat velit rerum. Qui.





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.

<b>Field or Control</b>	<b>Description</b>
<b>Personal Information</b>	This link appears if the user viewing this has security access to the component.
<b>Academic Institution</b>	This doesn't appear if there's only one active academic institution record ( <b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Institution Table</b> ).

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 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 Apply 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 transactions
- Review UCAS transactions.
- Handle UCAS applicant enquiries.
- Delete Apply applicant records.

## Understanding Processing Imported UCAS and Apply 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 canceled. The UCASApplicantCancelled XML object contains the data related to applicants and application choices that have been sent to UCAS by mistake or subsequently canceled at UCAS. When you use the Import Applicant Data process to import the applications and applicant data, the import process also imports the data. Use the Remove Wrong Applicants components to review the data and delete them from your database. You can also use the Remove Wrong Applicants components to manually unmatch 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 Initial Decision Entry page 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 Campus Solutions 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 UCAS and to import error codes once UCAS has processed the transactions. Transactions that the system sends to UCAS initially have an error code of -1 to indicate that UCAS hasn't 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 Error reference data.

The following describes how the system processes standards decisions which aren't related to Confirmation or Clearing:

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 doesn't 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 isn't 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.

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, the system looks at the program action reason mapping for the decision Interview you have set up on the Program Actions page. The system then attaches the program action and action reason to the application.

Use the Standard Offers page to define conditions for an offer to send to UCAS. For example, you can define a condition *three A Levels at Grade B* that can be used for multiple application decisions. Subsequently, you can enter this condition in the Decision Processing pages when making a conditional offer. When you generate transactions for the conditional offers, the system includes this condition in the transactions to send to UCAS.

The following example is a scenario for UCAS application processing.

Enter a decision and generate a transaction:

1. Use the Initial Decision Entry pages to enter a decision. For example, enter a decision of unconditional offer.
2. Run the Transaction Processing process to generate the transaction for the unconditional offer decision. (Select the **Generate Transactions** check box on the Transaction Processing page.)
3. Use the UCAS Transactions page to review the transaction. For example, because you entered a decision of Unconditional Offer, the Transaction Details section of the page displays the Transaction Type LD and Decision of U.

Now you want to export this decision to UCAS and also want to know that UCAS has received this transaction. It is recommended that you first generate transactions, review the created transactions, and then export the transactions to UCAS.

For XML-link processing, error codes are read back when the transaction is posted so steps 2 and 3 aren't required.

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.

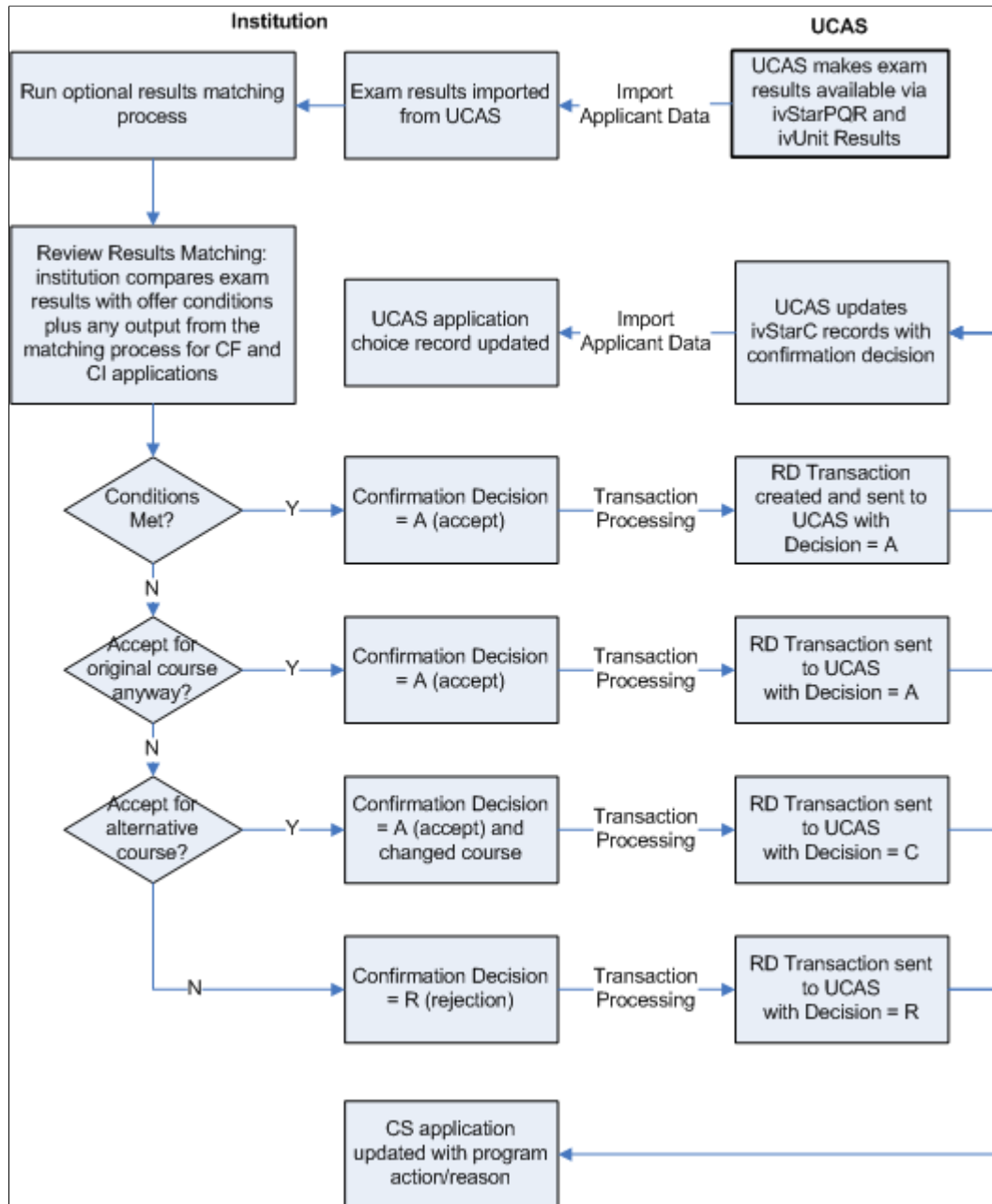
Finally, to know the UCAS applicant's response, complete these steps:

1. Run the Import Applicant Data process. If the applicant has responded to the offer, the Reply will be imported.
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 UCAS applications:

1. For UCAS applications, make sure you have imported Tariff reference data (by running the Import Reference Data process) if you want to use the Results/Offer Matching process to evaluate tariff offers.
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.
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 Confirmation decisions:

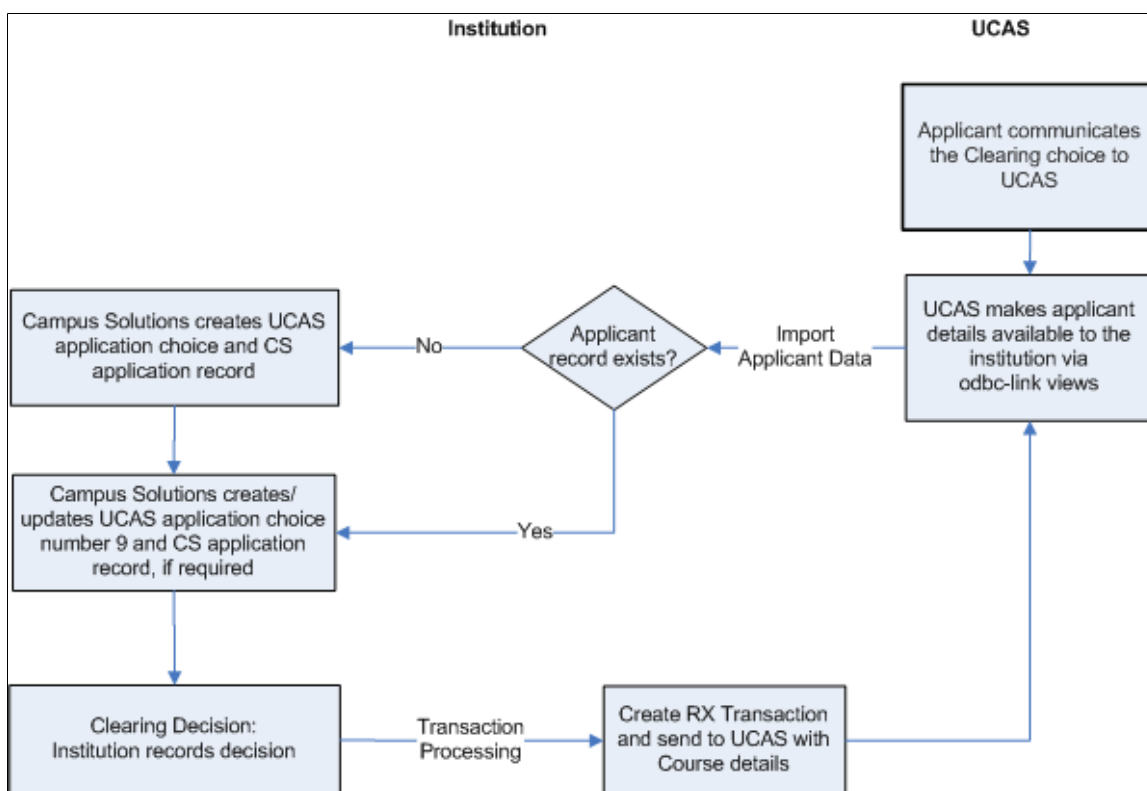
1. Use the Decision Processing page to enter the Delayed Confirmation decision for a CF application.
2. If you have selected the Conditional Offer check box on the UCAS Configuration component, use the Decision Approval page to approve this decision.
3. Run the Transaction Processing process to generate and export the RD transaction with the decision code of *D*.
4. A decision code of *D* is only valid in an RD transaction 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 don't display accepted Clearing applications (that is UCAS applications with choice number = 9 and the decision value = A).
3. Run the Transaction Processing process to generate and export the RX transaction to UCAS. The RX transaction must have a decision value.

This diagram illustrates an example of the Clearing process flow.



Use the UCAS Release to Clearing page to release an applicant into Clearing.

When a service indicator is assigned to a person ID, the corresponding negative or positive service indicator button appears on the UCAS decision processing pages for that person ID. For more information, see “Understanding Service Indicators” (Campus Community Fundamentals).

Note that the UCAS 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 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 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 doesn't have access to the UGRD application center. In such a case, the UCAS Decision Processing page doesn't allow SATRN11 to access an application associated with the UGRD application center.

The system applies the same application center security to UCAS 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 Apply Applications and Applicant Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Standard Offers	SAD_UC_STD_OFF	<b>Student Admissions &gt; UCAS Processing &gt; Standard Offers</b>	Define conditions for an offer that UCAS sends to the applicant.
UCAS Application Notes	SAD_UC_APPLNOTES	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Application Notes</b>	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	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Application Notes &gt; 3C/ Attachments</b>	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	<b>Student Admissions &gt; UCAS Processing &gt; Remove Wrong Applicants &gt; UCAS Wrong Applicants</b>	Review the imported canceled/wrong applicant records and delete records if required. You can also use this page to unmatch an applicant record that's incorrectly matched to a person record.
UCAS Initial Decision Entry	SAD_UC_DECENTRY	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Decision Processing &gt; Initial Decision Entry</b>	Enter an admission decision for a UCAS application choice.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
UCAS Decision Processing	SAD_UC_DECISN	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Decision Processing &gt; Decision Processing</b>	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	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Decision Processing &gt; Quick Decision Entry</b>	Enter a decision simultaneously for multiple UCAS applications.
Apply Decisions	SAD_UC_APDECISN_PG	<b>Student Admissions &gt; UCAS Processing &gt; Apply Decision Processing &gt; Apply Decisions</b>	Enter or update a decision for Apply applications.
UCAS Decision Approval	SAD_UC_DECAPR	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Decision Approval &gt; Decision Approval</b>	Approve or reject the admission decision for a UCAS application choice.
UCAS Quick Decision Approval	SAD_UC_QDAPR	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Decision Approval &gt; Quick Decision Approval</b>	Approve or reject simultaneously the admission decisions for multiple UCAS applications.
Results/Offer Matching Process	SAD_UC_MATCH_PROC	<b>Student Admissions &gt; UCAS Processing &gt; UCAS Decision Processing &gt; Result/Offer Matching Process</b>	Match exam results with conditional offer details for Confirmation. The process determines whether the applicants have satisfied the offer conditions.  You can run this process for all applicants in an institution, for all applicants of a particular course, or for specific applicants.  This process is optional for confirming conditional offers. You can use the Confirmation Entry page to manually determine whether an applicant has satisfied the offer conditions.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
UCAS Confirmation Entry	SAD_UC_CNFDEC	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Processing</b> > <b>Confirmation Entry</b>	Accept or reject the conditional offer of an applicant.  If you haven't run the Results/ Offer Matching process for the applicant, manually match the applicant's exam results with the conditional offer details and indicate whether the applicant has satisfied the conditions for admission.
UCAS Quick Confirmation	SAD_UC_QCONF	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Processing</b> > <b>Quick Confirmation</b>	Accept or reject the conditional offer of multiple applicants.
UCAS Confirmation Approval	SAD_UC_CNFAPR	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Approval</b> > <b>Confirmation Approval</b>	Approve or reject the Confirmation decision for an applicant.
UCAS Quick Confirmation Approval	SAD_UC_QAPR	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Approval</b> > <b>Quick Confirmation Approval</b>	Approve or reject the Confirmation decision for multiple applicants.
UCAS Release To Clearing	SAD_UC_RELDEC	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Processing</b> > <b>Release to Clearing</b>	Release an applicant into Clearing.
UCAS Release to Clearing Approval	SAD_UC_RELAPR	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Approval</b> > <b>Release to Clearing Approval</b>	Approve or reject an applicant's release into Clearing.
UCAS Enquiry Entry	SAD_UC_CLEARING	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Processing</b> > <b>Enquiry Entry</b>	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.  <hr/> <b>Note:</b> This component is obsolete and has been removed from the menu. <hr/>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
UCAS Qualifications	SAD_UC_IVFRMQUAL	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Decision Processing</b> > <b>Qualifications</b>	Review and edit imported qualification and exam result records.
Decision Export	SAD_UC_AEXP_RCTL	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Apply Decision Processing</b> > <b>Apply Decisions Export</b>	Post decisions for Apply applications.
Transaction Processing	SAD_UC_TRN_PROC	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Transaction Processing</b> > <b>Transaction Processing</b>	Generate, export, and update UCAS transactions.
UCAS Transactions	SAD_UC_TRANIN	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Transaction Processing</b> > <b>UCAS Transactions</b>	Review the UCAS transactions. In addition, manually add or delete transactions and set the hold flag to prevent the system from sending the transactions to UCAS.
UCAS Confirmation Enquiries	SAD_UC_CONF_ENQ	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>UCAS Confirmation Enquiries</b>	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.
Wrong Applicants	SAD_UC_GSTARW	<b>Student Admissions</b> > <b>UCAS Processing</b> > <b>Remove Wrong Applicants</b> > <b>Apply Remove Applicants</b>	You can use this page to unmatch an applicant record that's incorrectly matched to a person record.
ID Delete	RUNCTL_ID_CHANGE	<b>Campus Community</b> > <b>Personal Information</b> > <b>ID Management</b> > <b>ID Delete</b>	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

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 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 *01/01/00* 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*.

The system populates the Free Format field on the UCAS Decision Processing page with the Free Format value from the Standard Offers page without the interview date and time elements. 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 doesn't 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	
<b>Name:</b>	Kelly Carroll	<b>ID:</b>	0462
<b>Date of Birth:</b>	09/05/1987	<b>Academic Institution:</b>	PSGBR PeopleSoft University UK
<b>UCAS Personal ID:</b>	0053380265	<a href="#">Personal Information</a>	<a href="#">Applicant Summary</a>
<b>Application Code:</b>	UC02	<b>Application Year:</b>	2014
Choice Details			
<b>Choice Number:</b>	2	<b>Application Number:</b>	00026428 <a href="#">Maintain Applications</a>
<b>UCAS Course:</b>	L300 Sociology	<b>UCAS Campus:</b>	* <a href="#">Choice Details</a>
<b>Entry Year:</b>	2014	<b>Entry Month:</b>	9 <a href="#">Decision Entry</a>
<b>Entry Point:</b>	1	<b>UCAS Decision:</b>	<a href="#">CAS Details(1)</a>
<b>Reply:</b>			
Application Details			
<b>Application Date:</b>	01/05/2013	<b>Status:</b>	10 <span>+</span> <span>-</span>
<b>Disability:</b>	J You have two or more impairments and/or disabling medical conditions	<b>Nationality:</b>	000 UK national
<b>Country of Birth:</b>	000 United Kingdom	<b>UK Entry Date:</b>	01/01/1996
<b>Residential Category:</b>	1 UK Citizen or EU National	<b>Student Visa Study:</b>	Yes
<b>Worked/Lived in EU:</b>	Yes	<b>Parent/Spouse EU National:</b>	No
<b>Criminal Conviction:</b>	No <input checked="" type="checkbox"/> Criminal Records Declared	<input checked="" type="checkbox"/> Student Visa Required	
<b>School:</b>	00200 APPLY 2005, CHELTENHAM	<b>Last School:</b>	00200 APPLY 2005, CHELTENHAM
<b>Unavailable:</b>	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.

The screenshot displays two main sections of the UCAS Application Notes page:

- Contextual Data:** A table-like view with two columns of data. Fields include School, School Year, Percentage Achieving 5 GCSE, Best 8 GCSE Performance Score, Average QCA per Qual/Entry, Average QCA per Qual/Stdnt, Percentage FSM Entitled, Percentage EMA, Timestamp, Percentage Achieving 5 SCQF, Best 8 SCQF Performance Score, Average Tariff per Qual/Entry, Average Tariff per Qual/Stdnt, and Percentage FSM Registered. Navigation controls like 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible.
- Notes:** A form area containing:
  - \*Effective Date: 05/06/2012
  - \*Effective Sequence: 1
  - \*Notes: A large empty text area.
  - Action Required: A dropdown menu.
  - Outcome Code: A search field with a magnifying glass icon.
  - User ID: SATRN11

A 'View Printable Page' button is located at the bottom right of the form area.

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 doesn't affect the UCAS Application Notes page.

<b>Field or Control</b>	<b>Description</b>
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

<b>Choice Number:</b> 2	<b>Application Number:</b> 00025603	<a href="#">Maintain Applications</a>
<b>UCAS Course:</b> C100 Biology	<b>UCAS Campus:</b> *	<a href="#">Choice Details</a>
<b>Entry Year:</b> 2012	<b>Entry Month:</b> 9	<b>Entry Point:</b> 2
<b>UCAS Decision:</b> Conditional Offer	<b>Reply:</b> Firm	<a href="#">Decision Entry</a>
<a href="#">CAS Details(5)</a>		

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
<a href="#">Edit</a>	<a href="#">View</a>	UC02			11/08/2012	
<a href="#">Edit</a>	<a href="#">View</a>	UC02	TRANS	Academic Transcripts	11/08/2012	Initiated
<a href="#">Edit</a>	<a href="#">View</a>	UC02	PERSTA	Personal Statement	11/08/2012	Initiated

Comments 💬

Comment Category

Comment ID

🔍

		Category	Description	Function	Date/Time	Sequence
<a href="#">Edit</a>	<a href="#">View</a>					

Communications 📧

General Info

Letter Details

🔍

		Process Used	Method	Letter Code	Direction	Function	Assign Date/Time	Date Completed	Sequence
<a href="#">Edit</a>	<a href="#">View</a>		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.

<b>Field or Control</b>	<b>Description</b>
<b>Add Attachment</b>	Click to access standard PeopleTools functionality to browse to a file and upload it
<b>View</b>	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 aren't 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

Canceled **Cancelled Date:**

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:**

Remove Applicant
No Action

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 Canceled 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 doesn't 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.

<b>Field or Control</b>	<b>Description</b>
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.
<b>Remove Applicant</b>	<p>Click to run the Remove Applicant process that will delete the IDs:</p> <ul style="list-style-type: none"> <li>• UCAS applicant record.</li> <li>• UCAS application choice records.</li> <li>• Non-matriculated Campus Solutions application records.</li> </ul> <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>
<b>No Action</b>	<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
UCAS Personal ID	1063278675	<a href="#">Personal Information</a>
Application Code	UC01	<a href="#">Applicant Summary</a>
Application Year	2016	Status 10
Choice Details		
Choice Number	5	Application Number 00036101
UCAS Course	C:100 Biology	UCAS Campus *
Entry Year	2016	Entry Month 9
Entry Point	1	
UCAS Decision		Reply
		<a href="#">Maintain Applications</a>
		<a href="#">Choice Details</a>
		<a href="#">Application Notes(0)</a>
		<a href="#">Comments(0)</a>
		<a href="#">CAS Details(1)</a>
Decision Details		
*Institution Decision	<input type="checkbox"/>	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	<input type="text"/>	
	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 doesn't 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 doesn't 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 doesn't require approval.

- UCAS decision value of the choice (imported from StarC/StarG) isn't *W* (withdrawn) or *R* (rejected).
- 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, 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

<b>Field or Control</b>	<b>Description</b>
<b>Institution Decision</b>	<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 isn't 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 can't enter the Delayed Conditional decision code (<i>D</i>) on this page. This decision can be entered only in the Decision Processing page.</p>
<b>Decision Code</b>	Optionally, add a standard offer to the decision.
<b>Interview Date</b>	Select the date on which the interview is to take place.
<b>Interview Time</b>	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> .
<b>Comment</b>	<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: 1493301176      Personal Information      Applicant Summary  
 Application Code: UC01      Application Year: 2022      Status: 10      Referred

**Choice Details**

Choice Number: 1	Application Number: 00025212	<a href="#">Maintain Applications</a>
UCAS Course: C100      Biology-2019	UCAS Campus: *	<a href="#">Choice Details</a>
Entry Year: 2022	Entry Month: 9	<a href="#">Application Notes(0)</a>
Entry Point: 1		<a href="#">Comments(0)</a>
UCAS Decision:	Reply	<a href="#">CAS Details(1)</a>

**Qualifications** Personalize | Find | First 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	200000005	02/16/2021 12:00:00AM	<a href="#">Further Information</a>
2020	8	Edexcel	General Certificate of Secondary Education	Mathematics	A				B	200000006	02/16/2021 12:00:00AM	<a href="#">Further Information</a>
2022	8	AQA	GCE Advanced Level	English Language	Incomplete	B		Abcd		200000007	02/16/2021 12:00:00AM	<a href="#">Further Information</a>
2022	8	AQA	GCE Advanced Level	History	Incomplete	A*		Abcd		200000008	02/16/2021 12:00:00AM	<a href="#">Further Information</a>
2022	8	AQA	GCE Advanced Level	Geography	Incomplete	A		Abcd		200000009	02/16/2021 12:00:00AM	<a href="#">Further Information</a>

**Exam Results** Personalize | Find | First 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  Delayed Confirmation  Confirmation Decision  Release to Clearing

Decision Date/Time 04/06/23 3:46:47AM Decision Maker

Approval Status N Not Required Approver

Course Change  Campus Change

Entry Year Change  Entry Month Change  Entry Point Change

Decision Code

Delayed Confirmation Reason

Delayed Confirmation Action

---

**Offer Details** Personalize | Find | 1 of 1 Last

Order	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

592 characters remaining

Transaction Code

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

\*Notes

2000 characters remaining

Action Required

Outcome Code

User ID PS Locherty, Betty Last Updated 06/08/2021



<b>Field or Control</b>	<b>Description</b>
<b>Institution Decision</b>	<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>
<b>Confirmation Decision</b>	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.
<b>Release to Clearing</b>	The system automatically selects this check box when you enter a Release into Clearing decision in the UCAS Release to Clearing page.
<b>Decision Code</b>	Optionally, add a standard offer to the decision.
<b>Delayed Confirmation Reason</b>	<p>This indicates the reason for the delay in confirming the offer.</p> <p>Although multiple reasons are allowed, a single reason field is included to allow a lookup from the related reference data codes to ensure the value is valid. You can use the Free Format field to add additional reason codes starting with a comma, then using commas to separate other reason codes. If you add reasons in Free Format, those values are appended to the Delayed Confirmation Reason code when creating the RD transaction.</p>
<b>Delayed Confirmation Action</b>	This indicates the action students need to take to confirm the offer.
<b>Comment</b>	<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.</p> <p>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 Code:

Decision Maker:

Comment:

Decision Date/Time: 10/06/12 11:03:35PM  
Approval Status:

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"/>	<a href="#">Decision Processing</a>
2 0043278428	UC01	17/05/2012	9	Fairy	Libbie	W300	*	2012	9	1			<input type="button" value="Apply"/>	<a href="#">Decision Processing</a>
3 0043278437	UC01	17/05/2012	9	Kathi	Meg	W300	*	2012	9	1			<input type="button" value="Apply"/>	<a href="#">Decision Processing</a>

If you don't 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 doesn't exist.
- UCAS decision of the choice is blank.
- Choice isn't cancelled.
- The whole application isn't withdrawn.

In such a case, the page doesn't 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 doesn't require approval.
- UCAS decision value of the choice isn't *W*.
- Choice isn't cancelled.

- The whole application isn't 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 can't enter the Delayed Conditional decision code (D) in this 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.

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.

▼ Application
Find | View All
First 1 of 1 Last

Effective Date 03/06/2023	Application Status Conditions met
Provider 3R3 University of Oracle	Site Code A
Course Code Y397 Primary	
Study Mode full_time	Application Phase apply_1
Entry Year 2023	Entry Month 9
Application Number 00034348 <a href="#">Maintain Applications</a>	<a href="#">CAS Details(0)</a>
Submitted 02/11/2023	Reject by Default 04/26/2023
Last Update 03/06/2023 10:21:17AM	Withdrawn Not Withdrawn

**Conditions**

Disclosure and Barring Service (DBS) check

Fitness to Teach check

Offer Date 03/06/2023	Withdrawn Date
Offer Accepted Date 03/06/2023	Offer Declined Date
Offer Deferred Date	Deferred To Cycle
Status Before Deferral	
Recruited Date 03/06/2023	Rejection Date

▶ Notes

▶ Contact

▶ Candidate

▶ Qualifications

▶ Personal Statement

▶ Work History

▶ References

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.

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	<p>This defaults to the current date when you add a new row.</p> <hr/> <p><b>Note:</b> You can select a future effective date, but future records aren't included in the export process.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Decision</b>	<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 <a href="#">Creating or Reviewing Application Statuses for Apply Applications</a>.</p>
<b>Decision Maker</b>	<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"> <li>• If the user has defined a Decision Maker on the UCAS, Apply Defaults page.</li> <li>• 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.</li> <li>• Blank by default.</li> </ul>

## Course Change

This region appears only when Decision = *Offer*.

<b>Field or Control</b>	<b>Description</b>
<b>Select Course</b>	<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>
<b>Clear Course</b>	<p>Select to clear all the fields in this region as well as any default conditions in the Conditions region for the change of course.</p>

## 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.

<b>Field or Control</b>	<b>Description</b>
<b>Select Offer</b>	<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>
<b>Select Condition</b>	<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>

## Rejection Reasons

This region appears only when Decision = *Rejected*. You can create multiple records similar to the Conditions region.

To save the record, you must select at least one rejection code.

## Export Details

<i>Field or Control</i>	<i>Description</i>
<b>Export Status</b>	<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 UCAS 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	<a href="#">Maintain Applications</a>
UCAS Course:	V100 History	UCAS Campus:	*	<a href="#">Choice Details</a>
Entry Year:	2012	Entry Month:	9	<a href="#">Application Notes(0)</a>
Entry Point:	1			<a href="#">Comments(0)</a>
UCAS Decision:		Reply:		<a href="#">CAS Details(0)</a>

#### 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"/> <input type="button" value="Pending"/>
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:

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"/>	<a href="#">Decision Processing</a>
17	1097001822	UC01	3	Brown	Tyler	G522	*	2009	9	1	C	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	<a href="#">Decision Processing</a>
18	1097001877	UC01	3	Jefferys	William	G522	*	2009	9	1	F	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	<a href="#">Decision Processing</a>
19	1097001899	UC01	3	Murphy	Ryan	G522	*	2009	9	1	I	P	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	<a href="#">Decision Processing</a>

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

<b>Field or Control</b>	<b>Description</b>
Student Override	Select if you want to run the process for one or more IDs selected in the <b>EmplID</b> field.  If you select the <b>Student Override</b> check box, the process ignores any values entered in the <b>UCAS Course Code</b> field.

For a student, the process can compare the conditions you generated (Transaction Code) on the UCAS Decision Processing page with the exam results, and determine whether the student has satisfied the conditions. The process considers the following abbreviations when comparing conditional offer details with exam results:

- TO - Tariff offers
- GC - GCE A Level
- AS - GCE AS Level
- IH - Irish Leaving Certificate (Higher Level)
- SH - SQA Highers
- AH - SQA Advanced Highers
- EG - Excluding General Studies
- AC - Alternate conditions

Any other abbreviations need to be manually reviewed before the offer is confirmed.

After running this process, navigate to the UCAS Confirmation Entry page to check whether the applicant has satisfied the conditions. If the process determines that the applicant has satisfied all the conditions, the **Results Matching** field displays *Satisfied* on the UCAS Confirmation Entry page. If the process determines that at least one condition hasn't been met, the Results Matching field displays *Not Satisfied*. If the process determines that at least one condition hasn't 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	Libbie Manahan	ID	2427
Academic Institution	PSGBR PeopleSoft University UK	Date of Birth	05/28/1986
UCAS Personal ID	1463278428	Personal Information	Applicant Summary
Application Code	UC01	Application Year	2022
Status	10	Referred	
Choice Details			
Choice Number	1	Application Number	00034117
UCAS Course	C100 Biology	UCAS Campus	*
Entry Year	2022	Entry Month	9
Entry Point	1	Reply	Firm Acceptance
UCAS Decision	Conditional Offer	Maintain Applications	
		Choice Details	
		Application Notes(0)	
		Comments(0)	
		CAS Details(1)	
Decision Confirmation			
Institution Decision	C Conditional Offer	Decision Date/Time	03/09/2023 5:50:16AM
Decision Maker	<input type="text"/>	Approver	
Approval Status	N Not Required	Entry Point Change	<input type="checkbox"/>
Course Change	<input type="text"/>	Entry Month Change	<input type="checkbox"/>
Campus Change	<input type="text"/>		
Entry Year Change	<input type="text"/>		
Results Matching			
	<input type="button" value="Accept"/>	<input type="button" value="Reject"/>	

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 1-5 of 5 Last

Year	Month	Award Body	Type	Subject	Result	Predicted Grade
1	2020	8 OCR	General Certificate of Secondary Education	English	B	
2	2020	8 Edexcel	General Certificate of Secondary Education	Mathematics	A	
3	2022	8 AQA	GCE Advanced Level	English Language	Incomplete	B
4	2022	8 AQA	GCE Advanced Level	History	Incomplete	A*
5	2022	8 AQA	GCE Advanced Level	Geography	Incomplete	A

Exam Results
Personalize | Find | View All | First 1-4 of 4 Last

Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results
1	2022	8 OCR	GCE A Level	ENGLISH LANGUAGE	X		<a href="#">Unit Results</a>
2	2022	8 CAM	GCE A Level (H1)	ECONOMICS	P		<a href="#">Unit Results</a>
3	2022	8 AQA	GCE A Level	GEOGRAPHY	B	40	<a href="#">Unit Results</a>
4	2022	8 AQA	GCE A Level	HISTORY	A*	56	<a href="#">Unit Results</a>

Letter Text

Transaction Code

Summary of Conditions

Letter Text This offer is subject to your obtaining

GCE A level  
Grades AAA

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.

Results Matching

Manual Matching Required

Line Number	Transaction Code	Result Matching Text
1		

Notes Find | View All | First 1 of 1 Last

\*Effective Date  \*Effective Sequence

\*Notes

2000 characters remaining

Action Required

Outcome Code

User ID NG
Baran, Charles
Last Updated 04/06/2023

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 or Reject button, 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.

<i>Field or Control</i>	<i>Description</i>
Delayed Confirmation Reason Delayed Confirmation Action	These are display-only fields that appear when <b>Institution Decision = D</b> .  To enter values for these fields, use the <a href="#">UCAS Decision Processing</a> page.

## 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.

The screenshot shows the 'UCAS Quick Confirmation' interface. At the top, there are search filters: '\*Academic Institution' (PSGBR), 'UCAS Course', 'UCAS Campus', 'UCAS Entry Year' (2012), and 'Application Center'. A 'Search Decisions' button is present. Below the filters, there is a 'Decision Maker' field and a 'Decision Date/Time' field (11/06/12 3:25:52AM). A note states 'Only the first 300 results can be displayed.' Below this is a table with columns: 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, and Confirmation Details. Two rows of data are visible, each with 'Accept' and 'Reject' buttons.

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 doesn't display a DF application choice.
- The Quick Confirmation page doesn't 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 is *F* or *I*.
- Choice isn't cancelled.
- The whole application isn't 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	<a href="#">Maintain Applications</a>
UCAS Course: C100 Biology	UCAS Campus: *	<a href="#">Choice Details</a>
Entry Year: 2014	Entry Month: 9	<a href="#">Application Notes(0)</a>
Entry Point: 1		<a href="#">Comments(0)</a>
UCAS Decision: Conditional Offer	Reply: Firm	<a href="#">CAS Details(1)</a>

Decision Confirmation

Institution Decision: A Accept

Decision Date/Time: 26/06/13 12:35:46AM Decision Maker:

Approval Status: P Awaiting Approval Approver:

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:

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:  PeopleSoft University UK

UCAS Course:

UCAS Campus:

UCAS Entry Year:

Application Center:

---

Approver:  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	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	P	Awaiting Approval	<a href="#">Confirmation Details</a>
2 0053279155	UC01	1	Malia	Mitchell	C100	*	2012		A	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>	P	Awaiting Approval	<a href="#">Confirmation Details</a>

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**

<b>Choice Number:</b> 6	<b>Application Number:</b> 00026728 <a href="#">Maintain Applications</a>
<b>UCAS Course:</b> F100 Chemistry	<b>UCAS Campus:</b> * <a href="#">Choice Details</a>
<b>Entry Year:</b> 2013	<b>Entry Month:</b> 9 <a href="#">Application Notes(0)</a>
<b>Entry Point:</b> 1	<a href="#">Comments(0)</a>
<b>UCAS Decision:</b> Unconditional Offer	<b>Reply:</b> Firm <a href="#">CAS Details(1)</a>

**Release to Clearing**

**Institution Decision:** U Unconditional Offer

**Decision Date/Time:** 13/05/13 8:43:46AM **Decision Maker:**

**Approval Status:** N Not Required **Approver:**

**Release Reason:**

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 isn't 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 isn't eligible for release to Clearing. That's, 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	<a href="#">Personal Information</a>	<a href="#">Applicant Summary</a>
Application Code: UC01	Application Year: 2013	

Choice Details			
Choice Number: 6	Application Number: 00026728	<a href="#">Maintain Applications</a>	
UCAS Course: F100 Chemistry	UCAS Campus: *	<a href="#">Choice Details</a>	
Entry Year: 2013	Entry Month: 9	<a href="#">Application Notes(0)</a>	
Entry Point: 1		<a href="#">Comments(0)</a>	
UCAS Decision: Unconditional Offer	Reply: Firm	<a href="#">CAS Details(1)</a>	

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 style="width: 50px;" type="text"/> <input type="button" value=""/>		
Release Reason: R1 Financial hardship			

## 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							
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							
Result Details				Subject Details			
Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results
2013	8	AQA	A LEVEL	PHYSICS	B	100	<a href="#">Unit Results</a>
2013	8	AQA	A LEVEL	CHEMISTRY	C	80	<a href="#">Unit Results</a>
2013	8	AQA	A LEVEL	MATHEMATICS	A		<a href="#">Unit Results</a>

### Generating, Exporting, and Updating UCAS 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.

Use the check boxes in the **UCAS** region to generate, export, and update UCAS transactions.

During authentication, if **Use XML for Decisions** is selected, a request is sent that checks the combination of user ID and password to ensure they're correct. If the check fails, the processing the export of transactions is skipped and an error message is logged. If the check passes, the processing moves on to the individual calls to export transactions. If there's a UCAS decryption profile ID defined in the SA Features page, the stored encrypted password is decrypted to use with each request. Otherwise, the unencrypted password is used.

<b>Field or Control</b>	<b>Description</b>
<b>Generate Transactions</b>	Select to generate transactions and update the corresponding Campus Solutions application choice records.
<b>Export Transactions to UCAS</b>	Select to write the transactions to the TRANIN table at UCAS.  If the XML-link interface is set up for transactions, this process will use XML-link methods.

When exporting LD, LA, LC, RA, RD, and RW transactions for extra choices (where the local choice number value is 71, 72, 73, and so on), the choiceNumber parameter is populated with 7, if the local choice number values is 70 or greater. This applies to the following:

- setFirstDecisionTransactionUcas (LD)
- setAmendedDecisionTransUcas (LA)
- setCourseCorrectionTransUcas (LC)
- setUFAMendmentTransactionUcas (RA)
- setConfirmationDelayedTransUcas (RD)
- setConfirmationDecisionTransUcas (RD)

- setUFWithdrawalTransactionUcas (RW)

When exporting RA (UF amendment) and RW (UF withdrawal) transactions for clearing choices, the choiceNumber parameter is populated as 7, if the local choice number is 9.

When exporting LD, LA, LC, RA, RD and RX transactions, the process ensures that a SAD\_UC\_ENTRY\_POINT value of 9 is included as pointOfEntry = 0 (zero). SAD\_UC\_ENTRY\_POINT values of zero are included with blank pointOfEntry. For RD transactions, a change of entry point is only valid with decision of C.

## 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, a request is sent to check that the authentication token is correct. If the check fails, the processing that loads data to the staging records is skipped and an error message is logged. If the check passes, the POST Applications requests are made using the same authentication token as the initial authentication request. If there's an Apply decryption profile ID defined on the SA Features page, the stored encrypted authentication token is decrypted for use with each request. Otherwise, the unencrypted authentication token is used.

After authentication, the process 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 = *Offer Deferred*, the record is posted.

- Decision = Withdrawn, the record is posted.
- Decision = any other value, the decision isn't 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 Libbie Manahan	ID 2427	Date of Birth 05/28/1986
Academic Institution PSGBR	PeopleSoft University UK	
UCAS Personal ID 1463278428	<a href="#">Personal Information</a>	<a href="#">Applicant Summary</a>
Application Code UC01	Application Year 2022	Status 10 Referred

**Choice Details**

Choice Number 1	Application Number 00034117	<a href="#">Maintain Applications</a>
UCAS Course C100 Biology	UCAS Campus *	<a href="#">Choice Details</a>
Entry Year 2022	Entry Month 9	<a href="#">Application Notes(0)</a>
Entry Point 1		<a href="#">Comments(0)</a>
UCAS Decision Conditional Offer	Reply Firm Acceptance	<a href="#">CAS Details(1)</a>

**Decision Details**

Institution Decision C	Conditional Offer	Decision Maker
Decision Date/Time 03/09/23 5:50:16AM		
Approval Status N	Not Required	Approver
Course Change		Campus Change
Entry Year Change	Entry Month Change	Entry Point Change
Decision Code		

**Transaction Details** Find | View All | First 1 of 1 Last

*Transaction Type <input type="text"/>	Transaction ID <input type="text"/>
Error Code -1	Error Position
Decision <input type="text"/>	Created Date 04/06/23 4:03:44AM
Course <input type="text"/>	Campus <input type="text"/>
Entry Year <input type="text"/>	Entry Point <input type="text"/>
Entry Month <input type="text"/>	Entry Month <input type="text"/>
Transaction Code <input type="text" value="GC,AAA"/>	<input type="checkbox"/> Auto <input type="checkbox"/> Sent <input type="checkbox"/> Hold <input type="checkbox"/> Obsolete

585 characters remaining

Summary of Conditions

You can't 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 hasn't sent the transaction, you can use this page to update, delete, or hold the transaction.

<b>Field or Control</b>	<b>Description</b>
<b>Error Code</b>	<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"> <li>• <i>-1</i> indicates that UCAS hasn't yet processed the transaction.</li> <li>• <i>0</i> indicates that UCAS has successfully processed the transaction.</li> </ul>
<b>Error Position</b>	Indicates where the error appears in the transaction code.
<b>Decision</b>	Select a decision for the transaction of an application choice.
<b>Delayed Confirmation Reason</b> <b>Delayed Confirmation Action</b>	These fields appear if <b>Decision</b> equals <i>D</i> . To enter values for these fields, use the <a href="#">UCAS Decision Processing</a> page.
<b>Transaction Code</b>	Enter the transaction code that you want to send to UCAS.
<b>Auto</b>	Indicates that the system has automatically generated the transaction.
<b>Sent</b>	Indicates that the system has sent the transaction to UCAS.
<b>Hold</b>	Select to indicate that you don't want the system to export the transaction to UCAS.
<b>Obsolete</b>	<p>Select if you don't 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 doesn't export the transaction to UCAS. Hold or obsolete transactions can't 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.

<b>Transaction Type</b>	<b>Mandatory Field Value</b>
LD (decision) LA (amended decision) RD (confirmation decision)	Decision
LC (course correction)	At least one of the following values must be provided: <ul style="list-style-type: none"> <li>• Course</li> <li>• Campus</li> <li>• Entry Year</li> <li>• Entry Month</li> <li>• Entry Point</li> </ul>
RR (release into clearing)	Transaction Code must contain a value ranging from <i>.R1</i> to <i>.R8</i> .
PE, RA, or RW	None
RA, RR, and RW	Application must be UF. That is, Decision must be <i>U</i> (Unconditional Offer) and Reply must be <i>F</i> (Firm).

## 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 Date of Birth: 17/07/1990  
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	<a href="#">Applicant Summary</a>
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:

Action Required:  Outcome Code:

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.



<b>Field or Control</b>	<b>Description</b>
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.

## Deleting Apply Applicant Records

Access the Apply Remove Applicants page (**Student Admissions > UCAS Processing > Remove Wrong Applicants > Apply Remove Applicants**).

This example illustrates the fields and controls on the Apply Remove Applicants page.

The screenshot shows the 'Apply Remove Applicants' page. At the top, the title 'Apply Remove Applicants' is displayed. Below the title, applicant details are shown: Name Corinne Satterfield, ID 0177, Date of Birth 03/21/1997, Academic Institution PSGBR, PeopleSoft University UK, Candidate ID C25391, Personal Information, Application ID 34996, and Cycle 2022. There is a link for 'Applicant Summary'. Below this is a section titled 'Wrong Applicant Details' which shows 'Status Pending', a checked 'Cancelled' checkbox, and 'Cancelled Date 06/15/2022'. At the bottom of this section are two buttons: 'Remove Applicant' and 'No Action'.

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](#)

## Connecting to the Apply API

This section describes additional procedures so you can 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* and *SAD\_UC\_DFE\_APPL\_VI\_1\_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
  10. Repeat steps 3 to 7 for:
    - Routing Name: SAD\_UC\_DFE\_APPL\_V1\_POST
    - Service Operation: SAD\_UC\_DFE\_APPL\_V1\_1\_POST
    - Description: DFE Post Applications v1.1
- In step 6, update External Alias to SAD\_UC\_DFE\_APPL\_V1\_1\_POST.v1.

## 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,SAD\_UC\_DFE\_APPL\_V1\_1\_POST.v1*

It should look like this:

```
ig.UseDomainName.ExternalOperationNames=SAD_UC_DFE_APPL_GET.v1,
```

SAD\_UC\_DFE\_APPL\_POST.v1,SAD\_UC\_DFE\_APPL\_V1\_1\_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 -trustcacerts
```
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-R3This 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."

## Setting Up UCAS Service Operations

To import applicants using XML, you need to secure the web service operations as well as set up their routing definitions.

### Granting Permissions to UCAS Service Operations

To use the service operations, make sure you add them to the permission list that can use the web service.

1. Access the Permission Lists - Web Services page: go to **PeopleTools > Security > Permissions and Roles > Permission Lists**.
2. Search for the permission list **HCCPCSSA1000**.
3. Click **Web Services**.
4. Click the plus button to add **SAD\_UC\_UCXML**, then click **Edit**.
5. Click **Full Access (All)** to allow the permission list full access to all service operations, then click **OK**.
6. Save your changes.
7. Repeating steps 4 to 6 to add:
  - SAD\_UC\_TRANAPI
  - SAD\_UC\_REFAPI

### Setting Up Routings for the Service Operations

You need to set up the routing definition for each routing name and its matching service operation to import applicants and reference data as well as send transactions to UCAS through XML-link.

These are the routing names for each of the service operations.

<b><i>Routing Name</i></b>	<b><i>Service Operation</i></b>	<b><i>Description</i></b>
GETUCASAPPADRHIST	GETUCASAPPLICANTADDRESS HISTORY	Applicant Address History
GETUCASAPPADRHISTU	GETUCASAPPLICANTADDRESS HISTO70	Applicant Address Hist Unicode
GETUCASAPANSWER	GETUCASAPPLICANT ANSWERS	Applicant Answers
GETUCASAPPLBKG	GETUCASAPPLICANTS BACKGROUND	Applicant Background

<b>Routing Name</b>	<b>Service Operation</b>	<b>Description</b>
GETUCASAPPLCANCEL	GETUCASAPPLICANTS CANCELLED	Applicant Canceled
GETUCASAPPLCHOICES	GETUCASAPPLICANT CHOICES	Applicant Choices
GETUCASAPPLCNTXT	GETUCASAPPLICANT CONTEXTUALDATA	Applicant Contextual Data
GETUCASAPPLCRESP	GETUCASAPPLICANT CARINGRESPONSI	Applicant Caring Resp.
GETUCASAPPLDETAILS	GETUCASAPPLICANTS DETAILS	Applicant Details
GETUCASAPPLDETAILSU	GETUCASAPPLICANTS DETAILS_U	Applicant Details Unicode
GETUCASAPPLEDUC	GETUCASAPPLICANT EDUCATION	Applicant Education
GETUCASAPPLEFP	GETUCASAPPLICANT ESTRANGEDFROMP	Applicant Estranged
GETUCASAPPLEMPLU	GETUCASAPPLICANTS EMPLOYMENT_U	Applicant Employment Unicode
GETUCASAPPLFSM	GETUCASAPPLICANT FREESCHOOLMEAL	Applicant Free School Meals
GETUCASAPPLHED	GETUCASAPPLICANT HIGHEREDUCATIO	Applicant HE Activities
GETUCASAPPLICANTS EMPLOYMENT	GETUCASAPPLICANTS EMPLOYMENT	Applicant Employment
GETUCASAPPLLWC	GETUCASAPPLICANT LIVINGWITHCOND	Applicant Living w/Condition
GETUCASAPPLPCIAF	GETUCASAPPLICANT PARENTCARERINA	Applicant Parent/Carer AF
GETUCASAPPLPRES	GETUCASAPPLICANT PARENTINGRESPO	Applicant Parenting Resp.

<b>Routing Name</b>	<b>Service Operation</b>	<b>Description</b>
GETUCASAPPLQUAL	GETUCASAPPLICANT QUALIFICATIONS	Applicant Qualifications
GETUCASAPREINSTA	GETUCASAPPLICANTSREINSTATED	Applicant Reinstated
GETUCASAPPLRASS	GETUCASAPPLICANT REFUGEEASYLUMS	Applicant Refugee/Asylum
GETUCASAPPLREF	GETUCASAPPLICANT REFEREES	Applicant References
GETUCASAPPLREFU	GETUCASAPPLICANT REFEREES_U	Applicant References Unicode
GETUCASAPPLRSLTS	GETUCASAPPLICANTS RESULTS	Applicant Results
GETUCASAPPLSIAF	GETUCASAPPLICANT SERVEDINARMEDF	Applicant Served Armed Forces
GETUCASAPPLSTAT	GETUCASAPPLICANT STATEMENTS	Applicant Statements
GETUCASAPPLSTATU	GETUCASAPPLICANT STATEMENTS_U	Applicant Statements Unicode
GETUCASAPPLUNITS	GETUCASAPPLICANTS UNITS	Applicant Units
GETUCASASRR	GETUCASAPPLICANTSELF RELEASEDRE	Applicant Self Release
GETUCASREFCONTROL	GETREFERENCERESULTS REFRESHCONT	Reference Refresh Control
GETUCASRSLTMTCH	GETUCASRESULTSMATCH STATUS	Applicant Result Match
GETUCASHESAPPDATA	GETUCASHESADATA	Applicant HESA Data
GETUCASHESAPPDATAU	GETUCASHESADATA_U	Applicant HESA Data Unicode
GETREFDELCONF	GETUCASREFERENCE DELAYEDCONFIRM	Delayed Confirmation Reasons



<b>Routing Name</b>	<b>Service Operation</b>	<b>Description</b>
SETAMENDECSNTRAN	SETAMENDEDEDECISION TRANSUCAS	Set Amended Decision
SETCLEARDECSNTRAN	SETCLEARINGDECISION TRANSUCAS	Set Clearing Decision
SETCLEARFORMREQ	SETCLEARINGFORM REQUESTUCAS	Set Clearing Form Request
SETCONFDECSNTRAN	SETCONFIRMATION DECISIONTRANSUC	Set Confirmation Decision
SETCRSECORECTTRAN	SETCOURSECORRECTION TRANSUCAS	Set Course Correction
SETCONFDELTRAN	SETCONFIRMATION DELAYEDTRANSUCA	Set Delayed Confirmation
SETFIRSTDECSNTRAN	SETFIRSTDECISION TRANSACTIONUCA	Set First Decision
SETRELTOCLEARTRAN	SETRELEASEINTO CLEARINGTRANSACT	Set Release To Clearing
SETUFAMENDTRAN	SETUFAMENDMENT TRANSACTIONUCAS	Set UF Amendment
SETUFWDRAWTRAN	SETUFWITHDRAWAL TRANSACTIONUCAS	Set UF Withdrawal
GETREFABLSUBJ	GETREFERENCEABL SUBJECTS	Reference ABL Subject
GETREFADRHIST	GETREFERENCEADDRESS HISTORYREAS	Reference Address History
GETREFAPR	GETREFPERMANENT RESIDENCEAREAS	Reference Perm. Residence Area
GETREFAWDBDY	GETREFERENCE AWARDINGBODIES	Reference Awarding Body
GETREFCARDUR	GETREFERENCEINCARE DURATION	Reference In Care Duration

<b>Routing Name</b>	<b>Service Operation</b>	<b>Description</b>
GETREFCARE	GETREFERENCECARE	Reference Care
GETREFCOUNTRY	GETREFERENCECOUNTRIES OFBIRTH	Reference Country
GETREFCOURSES	GETUCASREFERENCE COURSES	Reference Course
GETREFDIS	GETREFERENCEDISABILITIES	Reference Disability
GETREFERROR	GETREFERENCEERRORS	Reference Error
GETREFESTAB	GETREFERENCEESTABLISH GROUPS	Reference Establishment Group
GETREFETHNIC	GETREFERENCEETHNICS	Reference Ethnicity
GETREFEXAMLVL	GETREFERENCEEXAMLEVELS	Reference Exam Level
GETREFFEE	GETREFERENCEFEEPAYERS	Reference Fee Payer
GETREFFSM	GETREFERENCEFREESCHOOL MEALS	Reference Free School Meals
GETREFGENIDE	GETREFERENCEGENIDENDIFF	Reference Gender Identity Diff
GETREFHEAT	GETREFERENCEHIGHER EDUCATIONACT	Reference HE Activity Type
GETREFINST	GETUCASREFERENCE INSTITUTIONS	Reference Institution
GETREFLEA	GETREFLOCALEDUCATION AUTHORITIE	Reference Local Educ Authority
GETREFNATION	GETREFERENCE NATIONALITYS	Reference Nationality
GETREFOEQ	GETREFOTHEREXAM QUALIFICATIONS	Reference Other Exam Quals
GETREFCOFABB	GETREFSTANDARDOFFER ABBREVIATIO	Reference Offer Abbreviation

<b>Routing Name</b>	<b>Service Operation</b>	<b>Description</b>
GETREFOFFSUB	GETREFERENCEOFFER SUBJECTS	Reference Offer Subject
GETREFPARHE	GETREFPARENTALHE	Reference Parental HE
GETREFPOCC20	GETREFERENCEPARENTAL OCCUPATI84	Reference Parental Occ 2020
GETREFPRESPN	GETREFERENCEHIGHER EDUCATIONA3	Reference HE Activity Provider
GETREFNOVISRSN	GETREFERENCENOVISAREASON	Reference No Visa Reasons
GETREFPRVSTUDLVL	GETREFERENCEPREVIOUSSTUDY LEVEL	Reference Previous Study Level
GETREFRASS	GETREFERENCEREFUGEE ASYLUMSEEKE	Reference Refugee Asylum
GETREFRELBLF	GETREFERENCERELIGION BELIEF	Reference Religion/Belief
GETREFRESCAT	GETREFERENCERESIDENTIAL CATEGOR	Reference Residential Category
GETREFSCHOOL	GETREFERENCESCHOOLS	Reference School
GETREFSCHCNT	GETREFERENCESCCHOOL CONTACTS	Reference School Contact
GETREFSCHCTX	GETCONTEXTUALDATA	Reference School Contextual
GETREFSCHTYP	GETREFERENCESCCHOOL TYPES	Reference School Type
GETREFSEXORT	GETREFERENCESEX ORIENTATION	Reference Sexual Orientation
GETREFSOCECO	GETREFERENCESOCIAL ECONOMIC	Reference Socio-Economic
GETREFSTUDELMOD	GETREFERENCESTUDY DELIVERYMODE	Reference Study Delivery Mode

<b>Routing Name</b>	<b>Service Operation</b>	<b>Description</b>
GETREFSTATUS	GETREFERENCEAPPLICANTS STATUS	Reference Applicant Status
GETREFTARIFF	GETREFERENCETARIFFS	Reference Tariff
GETREFUNITS	GETREFERENCEUNITS	Reference Units
GETREFUOFABB	GETREFERENCEOWNOFFER ABBREVIATI	Reference Own Offer Abbrev
GETREFVISIMIG	GETREFERENCEVISAOR IMMIGRATIONS	Reference Visa/Immigration

### Example of Setting Up a Service Operation

In this example, we'll set up `GETREFERENCERESULTSREFRESHCONT`. Once you've completed this, repeat steps 2 to 7 for the rest of the service operations, making sure you use the correct routing name and service operation each time.

1. Go to **PeopleTools > Integration Broker > Integration Setup > Routing Definitions**.
2. Click **Add a New Value**, then enter **GETUCASREFCONTROL**.
3. On the Routing Definitions page, populate these fields:

<b>Field</b>	<b>Value</b>
Service Operation	Enter <b>GETREFERENCERESULTSREFRESHCONT</b> .
Description	Enter <b>Reference Refresh Control</b> .
Sender Node	Enter the local node of the environment you're using.
Receiver Node	Enter <b>WSDL_NODE</b> .
Owner ID	Enter <b>Admissions - UK</b> .

4. On the Parameters page, do the following in these fields for Outbound Request and Inbound Request:
  - In External Alias for Outbound Response and Inbound Response, remove ".V1".
  - In Message.Ver into Transform 1, remove the value.

- In Message.Ver out of Transforms, remove the value.

5. On the Connector Properties page, fill out these fields:

<b>Field</b>	<b>Description</b>
Gateway ID	Enter <i>LOCAL</i> .
Connector ID	Enter <i>HTTPTARGET</i> .

6. In the Connector Properties grid, do the following:

a. Add a row for Property ID = HEADER.

<b>Field or Control</b>	<b>Values</b>
Property Name	Enter <i>sendUncompressed</i> .
Value	Enter <i>Y</i> .

b. Add a row for Property ID = HTTPPROPERTY.

<b>Field or Control</b>	<b>Values</b>
Property Name	Enter <i>Method</i> .
Value	Enter <i>POST</i> .

c. Add a row for Property ID = PRIMARYURL.

<b>Field or Control</b>	<b>Values</b>
Property Name	Enter <i>URL</i> .
Value	Enter the URL for the UCAS XML link test or production environment. For example, for HEP1, the URL is <a href="https://hep1xmllink.ucasenvironments.com/xml-link/XmlLinkWS..">https://hep1xmllink.ucasenvironments.com/xml-link/XmlLinkWS..</a>

d. Add another row a second Property ID = HEADER.

<b>Field or Control</b>	<b>Values</b>
Property Name	Enter <i>Content-Type</i> .
Value	Enter <i>text/xml</i> .

- e. Add another row for a second Property ID = HTTPPROPERTY.

<b>Field or Control</b>	<b>Values</b>
Property Name	Enter <i>SOAPUpContent</i> .
Value	Enter <i>Y</i> .

7. Save your changes.

# (GBR) Managing PBI Data Exchange

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## 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 reporting of eligible students for the Graduate Immigration Route scheme in bulk by submitting XML files of students' CAS numbers.
- The tracking of students who have been reported to UKVI for the Graduate Immigration Route scheme via the SMS portal.

See [Understanding PBI Field Derivation](#)

## Overview of Processing CAS Requests

Here's 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.

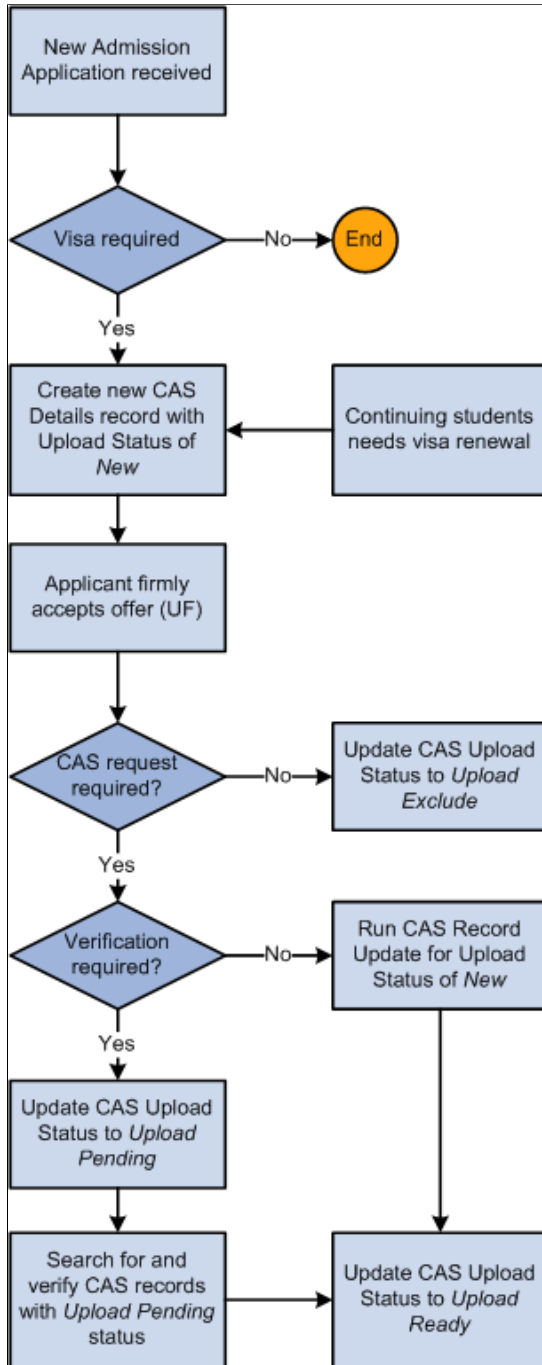
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See the UK Visas and Immigration website

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.

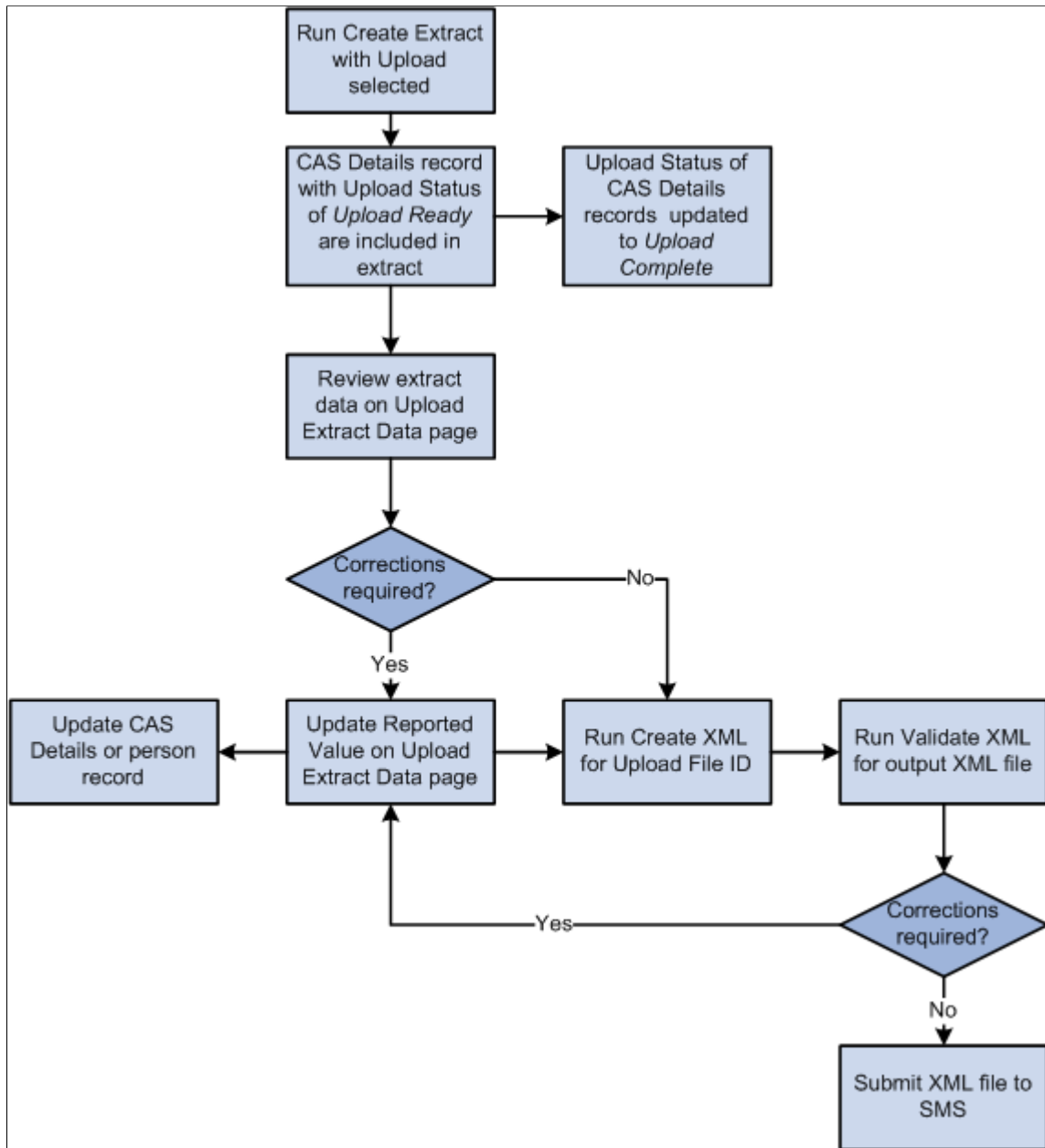


This diagram illustrates the process for creating and maintaining CAS Details records.



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.

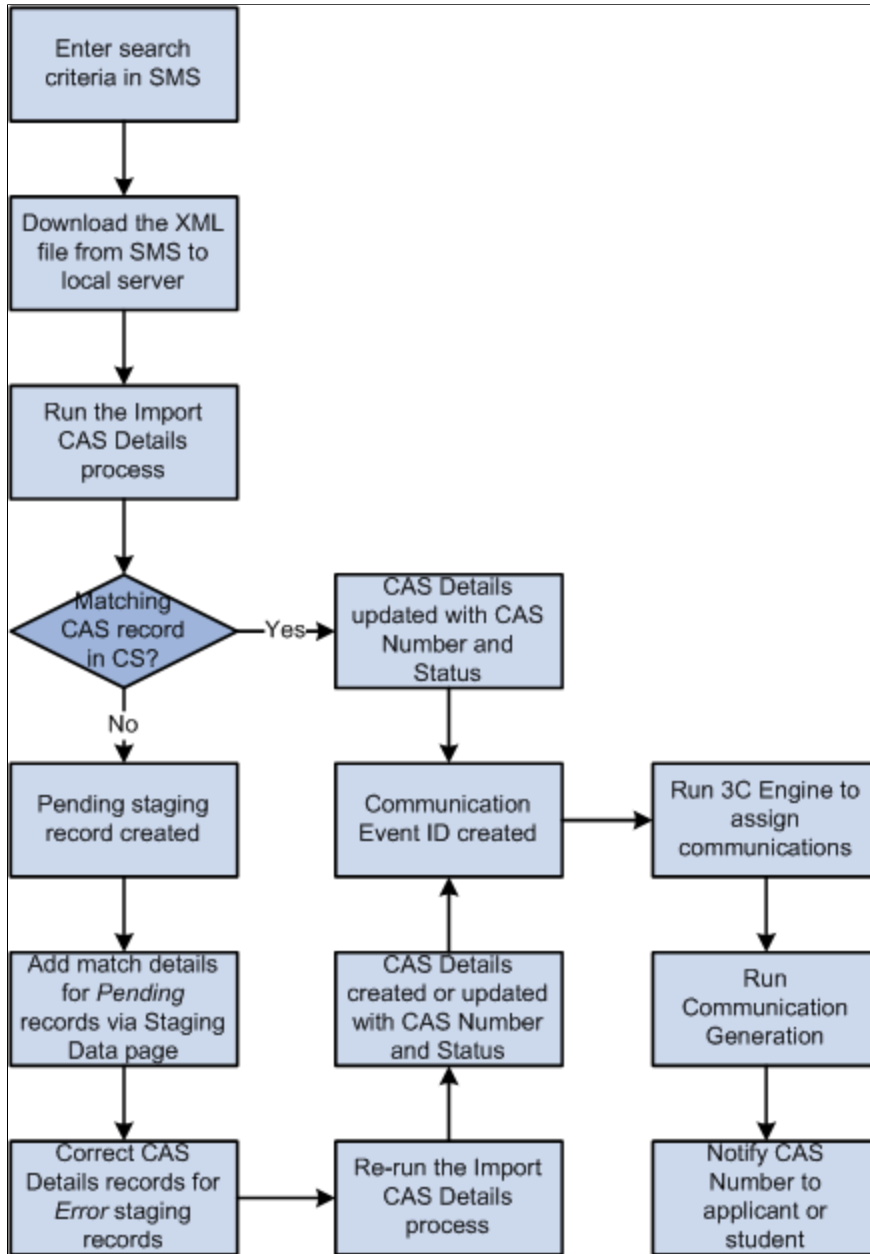


After you submit the CAS number requests to SMS, the UKVI assigns a CAS number to the applicant or student. You can generate a Bulk Export XML file from SMS and import the details using the Import CAS Details process.

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*.

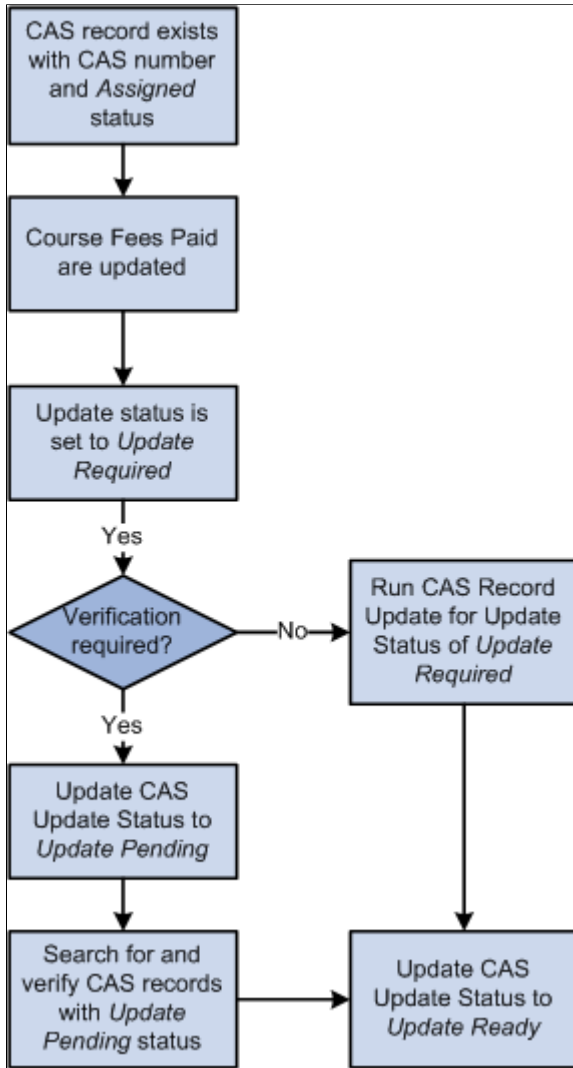
This diagram illustrates the process for importing CAS Details.



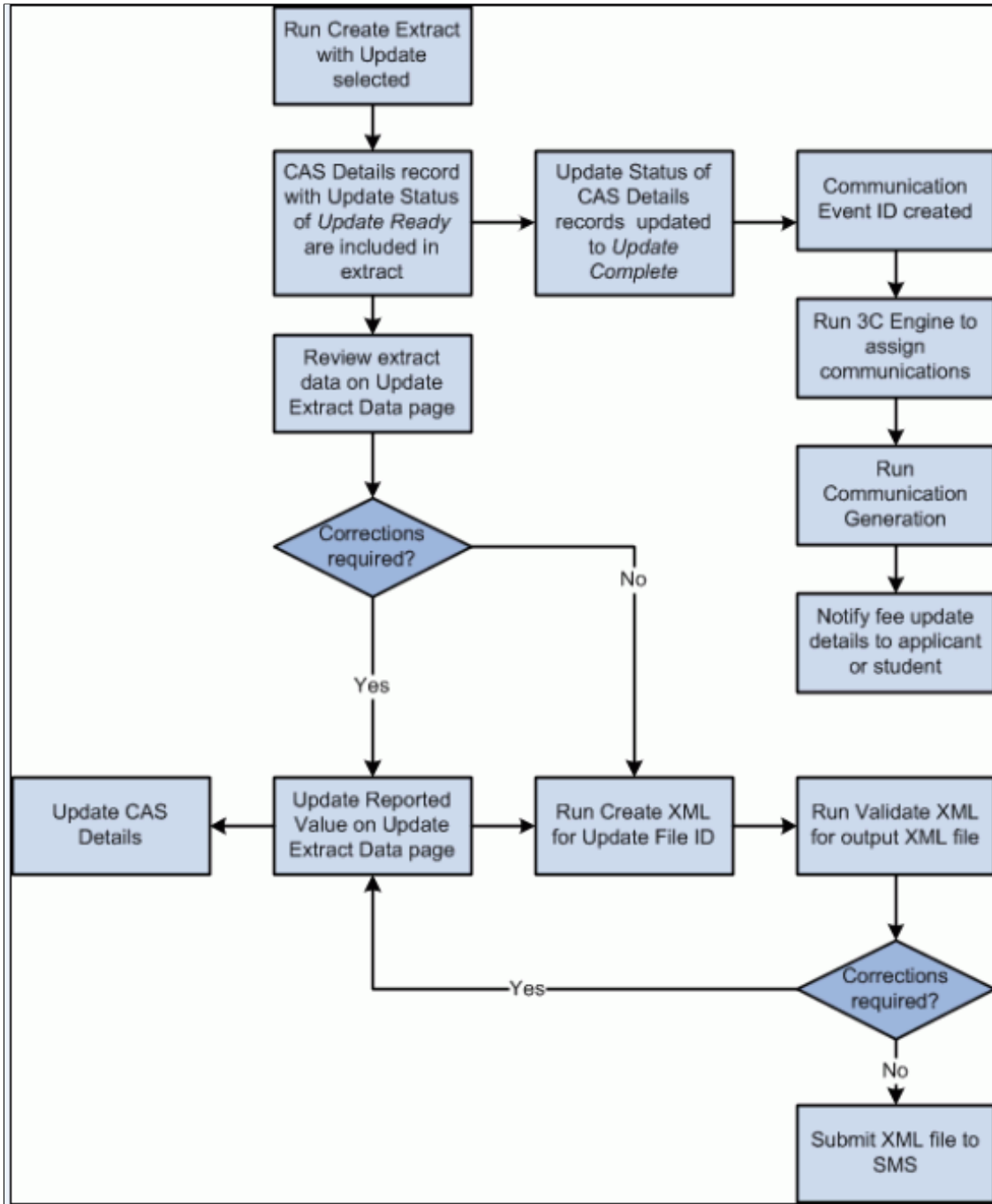
Once the CAS number has been assigned, any changes to the fees paid fields need to be reported to the UKVI via the Bulk Update file. When any of the fees paid fields is updated for CAS records that have a CAS number, the system automatically sets the Update Status to the status defined for Update Required. 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, 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.

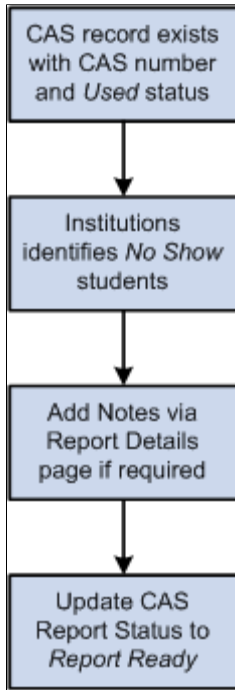


This diagram illustrates the process for creating the Bulk Update XML file.

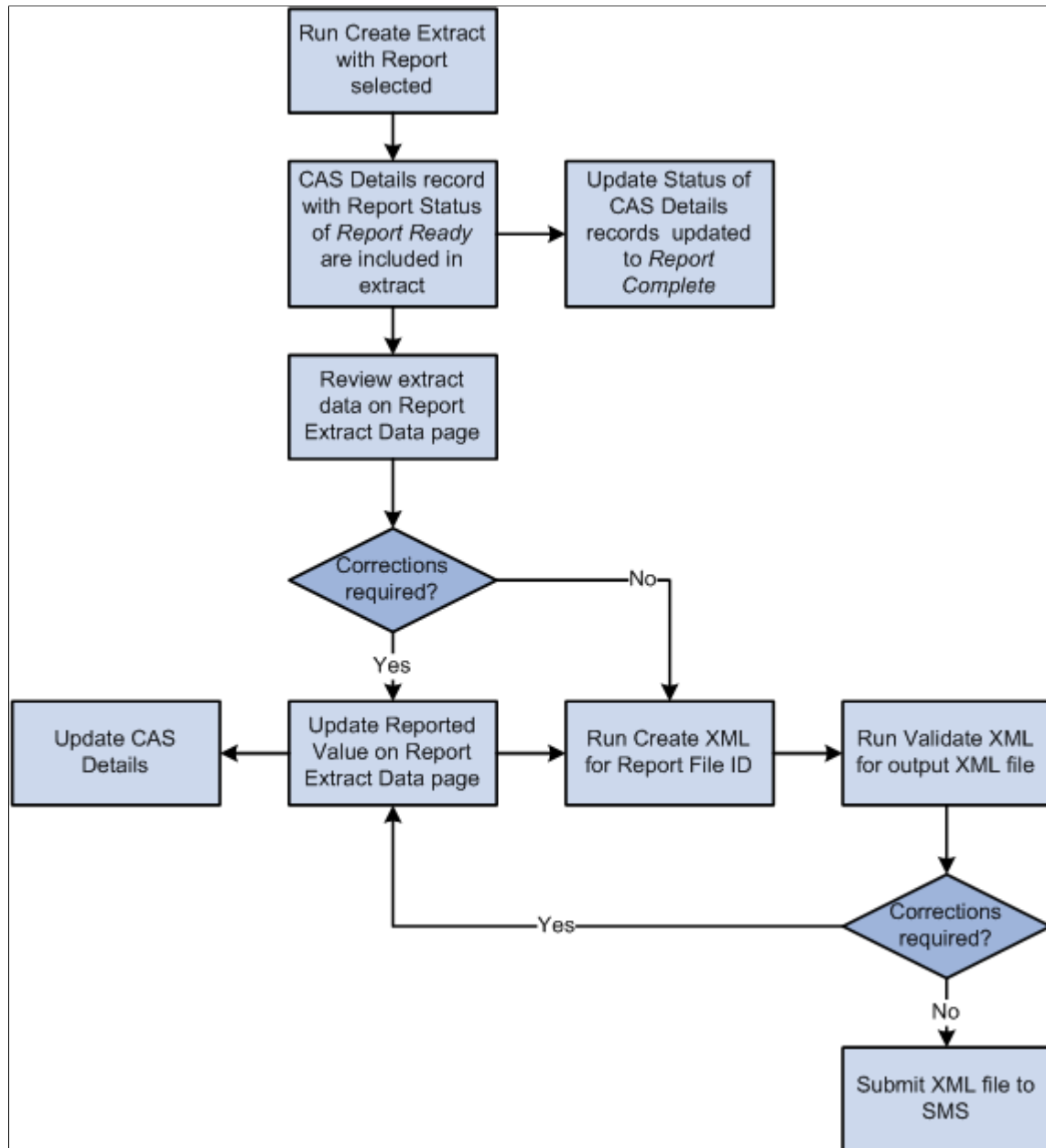


CAS records need to be submitted to SMS in the Bulk Report file if the applicant or student has used the CAS number in their visa application but is not attending your institution. You can set the Report Status to indicate the applicant or student is not attending. Once you have set this status, the 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.



## Overview of Processing Graduate Immigration Route

Graduate Immigration Route is a scheme introduced by the UK government that allows students to work unsponsored for two or three years after graduation depending on which qualification they have achieved. To be eligible, sponsored visa students need to have completed their course, been awarded an eligible qualification, and have met the minimum requirements for UK study time.

Here's the process flow to support the Graduate Immigration Route scheme.

1. Institutions use a PS Query that selects CAS Details records of students that meet the eligibility criteria and haven't already been reported to UKVI. This can reference completed Student Program records, Student Degree records, Visa/Permit Data records, and any other records that are required.

The criteria can be defined to exclude students who have already been reported to the UKVI by referencing the Graduate Status (SAD\_PB\_GRADUATE) value in CAS Details.

2. Run the CAS Record Update process using the PS Query to update the Graduate Status value in CAS Details to “Eligible” for students who meet the eligibility criteria and haven’t already been reported. The Graduate Status can also be manually set to “Eligible” in CAS Details if required for eligible students who were not included in the query results but need to be reported.

The Graduate Status can be manually set to “Ineligible” in CAS Details for students who were included in the query results but haven’t met all of the eligibility criteria and need to be excluded from the extract.

3. Run the Create Extract Process to extract the CAS Numbers for records with a Graduate Status of “Eligible.” The process generates a file ID that is used in the XML file. The CAS Details records that have been included are updated to set the Graduate Status to “Reported,” and to populate the File ID to indicate which file contains the record that was reported to the UKVI.

The extract data can be reviewed and, if required, the process re-run after manual adjustments are made to Graduate Status values in CAS Details.

4. Run the Create XML Process to generate an XML file for the File ID containing the CAS Numbers that need to be reported.

Once the XML file has been submitted to the UKVI, records with errors can be manually updated in CAS Details to set the Graduate Status value to indicate the student hasn't been successfully reported.

If eligible students have already been reported to the UKVI (either via the portal or in a CSV file), the Graduate Status can be set to “Reported” either manually in CAS Details, or by running the CAS Record Update process to prevent those students from being reported again. The CAS Record Update process allows a PS query or a CSV file to be used for the population selection.

Files are submitted to the SMS portal using the Bulk Report File, which is similar to the process of reporting students who used the CAS number in their visa application, but isn't attending your institution. A successful notification appears on individual CAS records in SMS.

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## 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	<b>Set Up SACR &gt; Install &gt; Student Admin Installation &gt; SA Features</b>	Enable the PBI pages and links in Campus Solutions.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Academic Institution 6	SSR_INST_FEATURES	<b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Institution Table &gt; Academic Institution 6</b>	Enable the PBI pages and links in Campus Solutions for a specific institution.
Statuses	SAD_PB_CONFIG1	<b>Student Admissions &gt; PBI Processing &gt; PBI Configuration &gt; Statuses</b>	Define the various processing statuses for CAS records.
PBI Configuration	SAD_PB_CONFIG	<b>Student Admissions &gt; PBI Processing &gt; PBI Configuration</b>	Create a PBI configuration record. Enter the sponsor license numbers of your institution and campuses. Also, specify field and course date defaults, applicant and student communication details, as well as defaults for the Graduate Immigration Route scheme.
Regional	SAD_UC_SCHOOL_SBP	<b>Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; Organization Table &gt; Regional</b>	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	<b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Program Table &gt; PBI Data</b>	Specify field values at program level.
Academic Plan PBI Data	SAD_PB_PLAN	<b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Plan Table &gt; PBI Data</b>	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.

The screenshot shows the PBI Configuration page with the following sections:

- Field Defaults:** Includes dropdowns for Work Placement, Accommodation Provided, Previous UK Study, SELT Required, ATAS Certificate Required, Dean's Certificate Required, and Accommodation Fees Included.
- Admit Term Defaults:** A table with columns for Admit Term, Cohort Tag, Course Fees, Boarding Fees, Start Date, Latest Acceptance, Expected Enrollment, and Expected End.
- Communication Details:** Includes fields for Notification Type, Record Type, Event ID, and Description.
- Campus Details:** Includes fields for Campus, Description, and Sponsor Licence Number.

*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

<b>Field or Control</b>	<b>Description</b>
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 Licence 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.

<b>Field or Control</b>	<b>Description</b>
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.

<b>Field or Control</b>	<b>Description</b>
Cohort Tag	(Optional) Select the appropriate cohort tag as set up for your institution.  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.

## 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.

<b>Field or Control</b>	<b>Description</b>
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.

<b>Field or Control</b>	<b>Description</b>
<b>Event ID</b>	<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' configuration page. At the top, there are tabs for 'PBI Configuration' and 'Statuses'. Below the tabs, the 'Academic Institution' is set to 'PeopleSoft University UK'. There is a checkbox for 'Apply Academic Org Security' which is currently unchecked. The page contains several dropdown menus for configuring different CAS statuses:

- New CAS Record:** New
- \*Upload Ready:** Upload Ready
- \*Update Required:** Update Required
- \*Update Ready:** Update Ready
- \*Report Ready:** Report Ready
- \*Graduate Eligible:** Graduate Eligible
- \*Upload Complete:** Upload Complete
- \*Update Complete:** Update Complete
- \*Report Complete:** Report Complete
- \*Graduate Reported:** (empty dropdown)

<b>Field or Control</b>	<b>Description</b>
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.
Graduate Eligible	Indicate whether a student is eligible for the Graduate Immigration Route scheme.
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.

<b>Field or Control</b>	<b>Description</b>
Graduate Reported	Student has been reported for the Graduate Immigration Route scheme.

Statuses are delivered as translate values for Upload (SAD\_PB\_UPLOAD), Update (SAD\_PB\_UPDATE) and Report (SAD\_PB\_REPORT) and Graduate (SAD\_PB\_GRADUATE). 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.

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**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.

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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.

The screenshot displays the 'PBI Data' page for an academic program. At the top, navigation tabs include Enrollment, Course, Dynamic Date, Program Information NLD, Home Campus NLD, Program HESA Data, Program Offering/Year HESA, and PBI Data. The page header identifies the Academic Institution as PSGBR (PeopleSoft University UK) and the Academic Program as BS (Bachelor of Science). Below this, a 'Details' section shows the Effective Date as 01/01/1900 and Status as Active. The main section is titled 'Points Based Immigration Data' and contains various input fields and dropdown menus: Partner Institution, Overseas Institution, Work Placement, Placement Percentage, Placement Justification, Placement Organisation, ATAS Certificate Required, Dean's Certificate Required, Accommodation Provided, Accommodation Fees Included, Months Duration, Course Hours, SELT Required, and Reason SELT Not Required. At the bottom, the 'Admit Term Defaults' section features a table with columns for Admit Term, Cohort Tag, Course Fees, Boarding Fees, Start Date, Latest Acceptance, Expected Enrollment, and Expected End. The table lists two rows: 1 2160 and 2 2150, with their respective fees and dates.

*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.

<b>Field or Control</b>	<b>Description</b>
<b>Cohort Tag</b>	<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.

The screenshot shows the 'Academic Plan PBI Data' page. At the top, there are navigation tabs: Academic Plan Table, Print Options, Taxonomy, Owner, Plan HESA Data, Plan Offering/Year HESA, **PBI Data**, Research Processing Options, and Adyjsment. Below the tabs, the page header identifies the Academic Institution as 'PSGBR PeopleSoft University UK' and the Academic Plan as 'BIOL Biology'. The 'Details' section shows 'Effective Date' as 01/01/1900 and 'Status' as Active. The main form area is titled 'Points Based Immigration Data' and contains several fields: Partner Institution, Overseas Institution, Work Placement, Placement Percentage, Placement Justification, Placement Organisation, ATAS Certificate Required, Dean's Certificate Required, Accommodation Provided, Accommodation Fees Included, Months Duration, Course Hours, SELT Required, and Reason SELT Not Required. At the bottom, there is a table titled 'Admit Term Defaults' with columns for Admit Term, Cohort Tag, Course Fees, Boarding Fees, Start Date, Latest Acceptance, Expected Enrollment, and Expected End. The table contains two rows of data.

*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.

<b>Field or Control</b>	<b>Description</b>
<b>Cohort Tag</b>	<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
<b>'Effective Date:</b> <input type="text" value="01/01/1900"/> <input type="button" value="31"/>	<b>'Status:</b> <input type="button" value="Active"/> <input type="button" value="Variable Data"/> <input type="button" value="+"/> <input type="button" value="-"/>
<b>'Description:</b> <input type="text" value="CAS Notification"/>	
<b>Short Description:</b> <input type="text" value="CAS Notf"/>	
<input checked="" type="checkbox"/> <b>Admin Function - People</b>	<input type="checkbox"/> <b>Admin Function - Organizations</b>

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.

The screenshot shows a query results interface with the following elements:

- Navigation tabs: Records, **Query**, Expressions, Prompts, Fields, Criteria, Having, View SQL, Run.
- Query Name: QA\_SAD\_PB\_CASB
- Description: CAS Student
- Feed icon and dropdown.
- Instructions: 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** section:

Alias	Record	
	A SAD_PB_CAS - CAS Details	<a href="#">Hierarchy Join</a>
	B ACAD_PROG - Student Academic Program	<a href="#">Hierarchy Join</a>
- Buttons: 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		

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: CASB

Description: CAS Student

Object Owner ID: Admissions - UK

Data Source Type: XMLDoc Object  Active

**Data Source Context**

\*Administrative Function: CASN 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](#)

Register Data Source

## 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.

<b>Definition</b>		Template	Output	Properties	Security	Bursting
Report Name:	CASA					
<b>Data Source</b>						
Data Source Type:	XMLDoc Object					
Data Source ID:	CASA					
Data Source Description:	CAS Applicant					
<b>Report Properties</b>						
Report Description:	<input type="text" value="CAS Applicant"/>					
*Report Status:	Active <input type="button" value="v"/>					
*Report Category ID:	<input type="text" value="ALLUSER"/> <input type="button" value="Q"/> All PeopleSoft User					
Object Owner ID:	PeopleTools <input type="button" value="v"/>					
*Template Type:	RTF <input type="button" value="v"/>					
Retention Days:	<input type="text"/>					
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:	<a href="#">Data Schema</a>		<a href="#">Sample Data</a>			

This example shows the Template page for CASA.

<b>Definition</b>		<b>Template</b>	Output	Properties	Security	Bursting
Report Name:	CASA					
<b>Template</b> <span style="float:right">Find   View All First <input type="button" value="1 of 1"/> Last</span>						
Template ID:	CASA_1	<input checked="" type="checkbox"/> Default Template	<input type="button" value="+"/> <input type="button" value="-"/>			
Description:	<input type="text"/>					
*Language Code:	English <input type="button" value="v"/>	Channel:	Email <input type="button" value="v"/>			
<b>Template Files</b> <span style="float:right">Find   View All First <input type="button" value="1 of 1"/> Last</span>						
Effective Date:	30/03/2010 <input type="button" value="+"/> <input type="button" value="-"/>					
*Status:	Active <input type="button" value="v"/>					
Template File:	<a href="#">CASA_1.rtf</a>		<input type="button" value="Upload"/>	<input type="button" value="Preview"/>	<input type="checkbox"/> Use Alt. XML	

This example shows the Definition page for CASB.

The screenshot shows the 'Definition' tab of a report configuration interface. At the top, there are navigation tabs: Definition, Template, Output, Properties, Security, and Bursting. The 'Report Name' is 'CASB'. Below this is a 'Data Source' section with fields for 'Data Source Type' (XMLDoc Object), 'Data Source ID' (CASB), and 'Data Source Description' (CAS Student). The 'Report Properties' section includes a 'Report Description' (CAS Student), '\*Report Status' (Active), '\*Report Category ID' (ALLUSER), 'Object Owner ID' (Admissions - UK), and '\*Template Type' (RTF). At the bottom, it shows 'Retention Days' (empty), 'Registered Date/Time' (25/03/2010 13:27:46), 'Registered By' (PS), 'Updated Date/Time' (25/03/2010 13:27:46), and 'Updated By' (PS). There are links for 'Download: Data Schema' and 'Sample Data'.

This example shows the Template page for CASB.

The screenshot shows the 'Template' tab of the report configuration interface. The 'Report Name' is 'CASB'. The 'Template' section includes a search bar and navigation controls (Find, View All, First, 1 of 1, Last). Fields include 'Template ID' (CASB\_1), 'Description' (empty), '\*Language Code' (English), and 'Channel' (Email). A 'Default Template' checkbox is checked. The 'Template Files' section has a search bar and navigation controls. Fields include 'Effective Date' (25/03/2010), '\*Status' (Active), and 'Template File' (CASB.rtf). There are 'Upload' and 'Preview' buttons, and a 'Use Alt. XML' checkbox.

### 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: [Dropdown]

**Processing Letter Details**

\*Function: CAS Notification [Dropdown]

Applicable to:  Persons     Organization

\*Letter Type: Softcopy [Dropdown]

\*Letter Printed Data: All [Dropdown]      SQC Name: [Text]

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](#) [Buttons]

Data Source ID: CASB

**Template List**      Customize | Find | [Icons]      First 1 of 1 Last

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.

The screenshot displays the 'Communication Speed Keys' interface. At the top, it shows the institution as 'PSUNV PeopleSoft University' and the function as 'CASN CAS Notification'. Below this is a 'Comm Key Detail' section with a search bar and navigation controls. Two key details are shown:

- \*Comm Key: CASA**
  - Description: CAS Applicant
  - Short Desc: CAS Applic
  - Category: CASA (CAS Applicant)
  - Context: CASA (CAS Applicant)
  - Duration: [Empty]
  - Method: E (E-Mail)
  - Direction: OUT
  - Letter Code: CSA
  - Comments: Comment for CASA applicant
  - Options:  Print Comment,  Activity Completed,  Unsuccessful Outcome
- \*Comm Key: CASB**
  - Description: CAS Student
  - Short Desc: CAS Studen
  - Category: CASB (CAS Student)
  - Context: CASB (CAS Student)
  - Duration: [Empty]
  - Method: E (E-Mail)
  - Direction: OUT
  - Letter Code: CSB
  - Comments: Comment for CAS student
  - Options:  Print Comment,  Activity Completed,  Unsuccessful Outcome

### 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  User Selection

\*Function: CASN  CAS Notification [Variable Data Joint Rules](#)

**Communications**

\*Comm Key: CASA  CAS Applicant [Detail](#)

**Comments**

\*Comment Category:

**Checklists**

\*Checklist Code:    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  User Selection

\*Function: CASN  CAS Notification [Variable Data Joint Rules](#)

**Communications**

\*Comm Key: CASB  CAS Student [Detail](#)

**Comments**

\*Comment Category:

**Checklists**

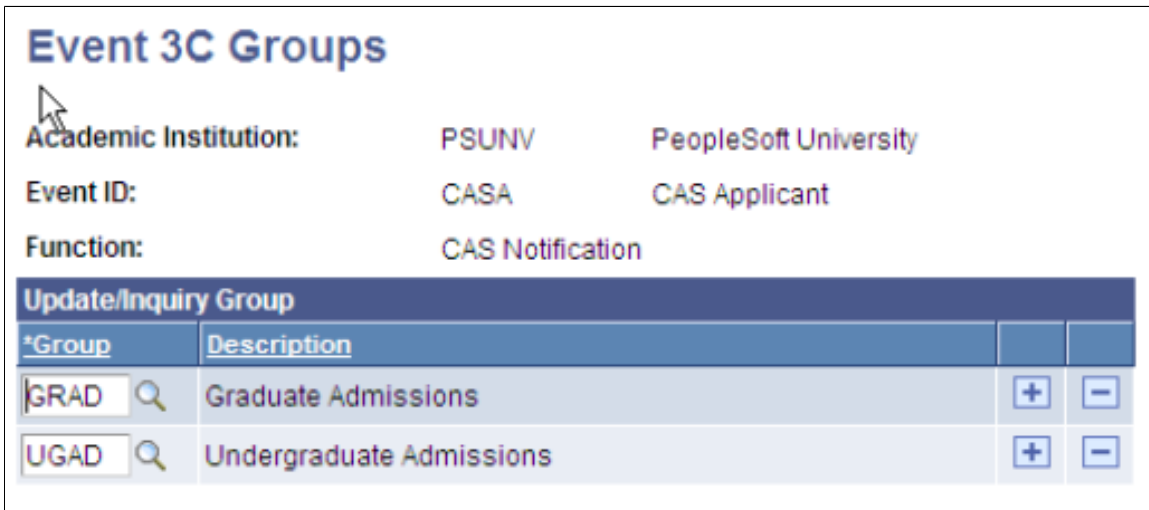
\*Checklist Code:    Update Status

### Defining Event 3C Groups

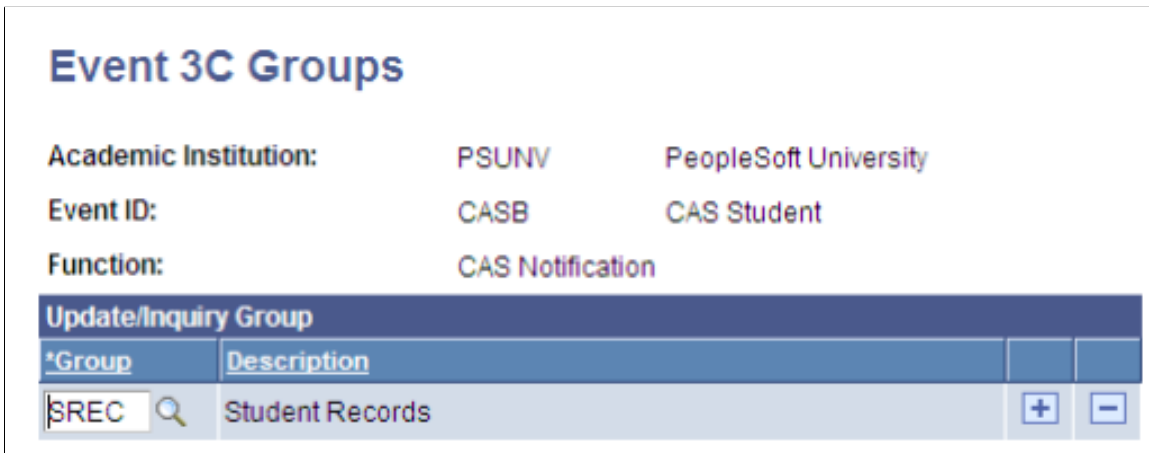
Access the Event 3C Groups page (**Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups**).

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.



This example shows the Event 3C Groups page for CASB.



### 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

**\*Description:**   **System Data**

**\*Attribute Record:**

**Override Prompt Table:**

**Extend to staging record**

**Entity Name:**

**Attribute Filter Class:**

[Delete Record Context](#)

**Attribute Display Type**

Inline Subpage  **Secondary Page**

**Copy Attributes from**

**Attributes** Find | View All | First 1 of 1 Last

**\*Attribute Sequence:**  **Status:**

**\*Common Attribute:**

**Required**

**Entity Associations** Find | View All | First 1 of 1 Last

	*Entity Name		
1	<input type="text"/>	+	-

This example shows the delivered record context for SAD\_PB\_CAS.

*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.
- Enter or update Graduate Immigration Route data

## Pages Used to Create and Maintain CAS Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CAS Details	SAD_PB_CAS	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; PBI Processing &gt; CAS Maintenance &gt; CAS Details</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; CAS Maintenance</b></li> <li>• <b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application Program Data &gt; CAS Details</b></li> <li>• <b>Records and Enrollments &gt; Career and Program Information &gt; Student Program/Plan &gt; Student Program &gt; CAS Details</b></li> </ul>	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	<b>Recruiting and Admissions &gt; PBI Processing &gt; Create CAS Records</b>	Create CAS Details records using Population Selection.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Report Details	SAD_PB_CASREPDTLS	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; PBI Processing &gt; CAS Maintenance &gt; Report Details</b></li> <li>• <b>Student Admissions &gt; Application Entry &gt; CAS Maintenance</b></li> <li>• <b>Student Admissions &gt; Application Maintenance &gt; Maintain Applications &gt; Application Program Data &gt; CAS Details &gt; Report Details</b></li> <li>• <b>Records and Enrollments &gt; Career and Program Information &gt; Student Program/Plan &gt; Student Program &gt; CAS Details &gt; Report Details</b></li> </ul>	Enter or update report field values for a CAS Details record at the application or student career level.
Graduate Route	SAD_PB_CASGRDRPT	<b>Student Admissions &gt; PBI Processing &gt; CAS Maintenance &gt; Graduate Route</b>	View, enter, or update values for Graduate Route processing.

## 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**).

<i>Field or Control</i>	<i>Description</i>
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).

<b>Field or Control</b>	<b>Description</b>
Query Name	<p>These sample queries are provided:</p> <ul style="list-style-type: none"> <li>• <b>SAD_PB_CAS_CREATE_APPLICANT:</b> 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.</li> <li>• <b>SAD_PB_CAS_CREATE_STUDENT:</b> 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.</li> </ul>

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

<b>Field or Control</b>	<b>Description</b>
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 displays the 'CAS Details' page with the following information:

- Navigation:** CAS Details | Report Details | Graduate Route
- Personal Information:**
  - First Name: Melissa, Middle Name: ID 0251
  - Last Name: Kent
  - Academic Institution: PeopleSoft University UK, Record Type: Applicant
  - Academic Career: Undergraduate, Student Career Nbr: 0
  - Record Number: 1, Residency: Home/United Kingdom
  - Application Number: 00029070, Program Number: 0
  - Academic Program: Bachelor of Science, Campus: Main Campus
  - Admit Term: 2021-22 Academic Year, Academic Load: Full-Time
- CAS Status:**
  - \*Effective Date: 09/09/2021, \*Effective Sequence: 1
  - Upload Status: New
  - Fields: CAS Number, CAS Status, Update Status, Upload File ID, Export File ID, CAS Status Date, Update File ID
  - User ID: NG, Baran, Charles
- Applicant Details:**
  - Date of Birth: 07/17/1988, Report Year/Month Only: , Report Year Only:
  - Gender: Female, UCAS Personal ID: 1483380201
  - Birth Country: United Kingdom, Birth Location:
  - Nationality: United Kingdom
  - Passport Number: 1004589787877
  - Partner Institution: [Search], Overseas Institution: [Search]
  - SELT Required: No, Reason SELT Not Required: [Dropdown]
  - English Level Attained: [Dropdown], Test Provider: [Dropdown]
  - English Reading Level: [Input], English Speaking Level: [Input]
  - English Listening Level: [Input], English Writing Level: [Input]
- Expandable Sections:**
  - 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.

<b>Field or Control</b>	<b>Description</b>
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
Effective Date	By default, the current date for new rows is reflected. But you can manually update this date to reflect the actual date the change was reported.
Upload Status	Identifies whether the record has been identified as: <ul style="list-style-type: none"> <li>• Newly added (New or blank)</li> <li>• To be included in the Upload extract (Upload Ready)</li> <li>• Included in the Upload extract (Upload Complete)</li> </ul> Once the CAS Number and Status have been imported the system makes this field non-editable.
Upload File ID	Displays the File ID generated when the record is included in the Upload extract.
CAS Number, Export File ID, CAS Status, andCAS Status Date	Displays the values imported using the Import CAS Details process.  The CAS Number field is used to derive the corresponding field in the Update and Report extracts.

<b>Field or Control</b>	<b>Description</b>
Update Status	<p>Identifies whether the record has been identified as:</p> <ul style="list-style-type: none"> <li>• Requiring inclusion in the Update extract (Update Required)</li> <li>• To be included in the Update extract (Update Ready)</li> <li>• Included in the Update extract (Update Complete)</li> </ul> <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:       Reason SELT Not Required:

English Level Attained:

English Reading Level:

English Listening Level:

Test Provider:

English Speaking Level:

English Writing Level:

<b>Field or Control</b>	<b>Description</b>
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><b>Note:</b> 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.
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.

<b>Field or Control</b>	<b>Description</b>
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	<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>
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	<p>These fields become available when the value is <i>Yes</i> in the SELT Required field.</p>

**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.

<b>Field or Control</b>	<b>Description</b>
Academic Plan	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.  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
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.

<b>Field or Control</b>	<b>Description</b>
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. 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>
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>

<b>Field or Control</b>	<b>Description</b>
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"> <li>• Academic Plan PBI Data page</li> <li>• Academic Program PBI Data page</li> <li>• PBI Configuration page</li> <li>• 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.</li> </ul> <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>
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>



<b>Field or Control</b>	<b>Description</b>
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>
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>

<b>Field or Control</b>	<b>Description</b>
Placement Organization	Enter an external ID value if required.  This field becomes available when the value is <i>Yes</i> in the Work Placement field.  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.
Placement Justification	This field becomes available when the value is <i>Yes</i> in the Work Placement field.  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.
Placement Percentage	This field becomes available when the value is <i>Yes</i> in the Work Placement field.  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.

**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.

Financial Details	
Accommodation Provided:	<input type="text" value="No"/>
First Year Course Fees:	<input type="text" value="9500.00"/>
Accommodation Fees Included:	<input type="text" value="No"/>
First Year Boarding Fees:	<input type="text" value="0.00"/>
Course Fees Paid:	<input type="text" value="5000.00"/>
Accommodation Fees Paid:	<input type="text"/>
Boarding Fees Paid:	<input type="text"/>

<b>Field or Control</b>	<b>Description</b>
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>
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>

<b>Field or Control</b>	<b>Description</b>
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>
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 <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>

## 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.

<b>Field or Control</b>	<b>Description</b>
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>
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.

The screenshot shows a web application interface with two tabs: 'CAS Details' and 'Report Details'. The 'Report Details' tab is active. The page displays personal information for a student named Jonathon Redmond (ID: ADM1010) who is an Applicant at PeopleSoft University. Below this, there are report-specific details: Effective Date (22/02/2011), Report Status (Report Ready), Expected Enrollment (25/02/2011), Effective Sequence (1), and Report File ID. A Notes field is also present.

<b>Field or Control</b>	<b>Description</b>
Report Status	<p>Identifies whether the record has been identified as:</p> <ul style="list-style-type: none"> <li>To be included in the Report extract (<i>Report Ready</i>).</li> <li>Included in the Report extract (<i>Report Complete</i>).</li> </ul> <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	<p>Displays the File ID generated when the record is included in the Report extract.</p>
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>

<b>Field or Control</b>	<b>Description</b>
Notes	Enter a value up to a maximum of 2000 characters.  The value is used to derive the Notes field for the Report extract.

## Entering Graduate Route Information

Access the Graduate Route page (**Student Admissions > PBI Processing > CAS Maintenance > Graduate Route**).

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

<b>Field or Control</b>	<b>Description</b>
<b>Graduate Status</b>	Identifies whether the record is: <ul style="list-style-type: none"> <li>To be included in the Graduate extract (<i>Graduate Eligible</i>).</li> <li>Excluded from the Graduate extract (<i>Graduate Ineligible</i>).</li> <li>Included in the Graduate extract (<i>Graduate Reported</i>).</li> </ul>
<b>Graduate File ID</b>	When a student's record has been included in the graduate extract, this field shows the file ID that contains the record.  You can update this field to clear the existing value in case there's an error in processing the file at UKVI.

<i>Field or Control</i>	<i>Description</i>
<b>Graduate Notes</b>	<p>The CAS Update Record process can manually update this field, or you can update it manually for students who have been reported directly through the SMS portal.</p> <hr/> <p><b>Note:</b> Graduate Notes is not included in the XML file for submission to the UKVI.</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.
- Set graduate status.

This section discusses how to update multiple CAS Records.

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**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.

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## 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	<b>Student Admissions &gt; PBI Processing &gt; CAS Record Update</b>	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: PS Report Manager Process Monitor Run

**Selection Criteria**

\*Academic Institution

Academic Career

Academic Program

Academic Plan

Admit Term

Record Type

Upload Status

Update Status

Report Status

Graduate Status

**Population Selection**

Selection Tool

Query Name

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

Graduate Status

Graduate Notes

**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 selecting a PS Query value or an external file.

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 or external file 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.

In the Selection Tool, if you use an external file as a processing option, you can use the delivered mapping CAS\_RESULTS. You can click **Preview Selection Results** to validate the file structure.

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:

<b>Process Parameter</b>	<b>Conditions</b>
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.
Graduate Status	No conditions.
Graduate Notes	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	<b>Student Admissions &gt; PBI Processing &gt; Create Extract</b>	Generate the Upload, Update, or Report extract data.
Upload Extract Data	SAD_PB_UPL_EXT	<b>Student Admissions &gt; PBI Processing &gt; Upload Extract Data</b>	Review and edit the upload extract data.
Update Extract Data	SAD_PB_UPD_EXT	<b>Student Admissions &gt; PBI Processing &gt; Update Extract Data</b>	Review and edit the update extract data.
Report Extract Data	SAD_PB_REP_EXT	<b>Student Admissions &gt; PBI Processing &gt; Report Extract Data</b>	Review and edit the report extract data.
Graduate Extract Data	SAD_PB_GRAD_EXT	<b>Student Admissions &gt; PBI Processing &gt; Graduate Extract Data</b>	Review graduate extract data.
Create XML	SAD_PB_GXML	<b>Student Admissions &gt; PBI Processing &gt; Create XML</b>	Generate the XML file from the extract data.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Validate XML	SAD_PB_VALX_PRC	<b>Student Admissions &gt; PBI Processing &gt; Validate XML</b>	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: PS Report Manager Process Monitor Run

**PBI Extract**

Academic Institution

Create Upload

Create Update

Create Report

Create Graduate

Include Applicants

Include Students

Upload File ID Override

Update File ID Override

Report File ID Override

Graduate File ID Override

<b>Field or Control</b>	<b>Description</b>
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> .

<b>Field or Control</b>	<b>Description</b>
Create Graduate	<p>Select to create the graduate extract data.</p> <p>CAS Details records for the academic institution are selected where the Graduate Status in the most recent row is the same as the Graduate Eligible status defined in PBI Configuration.</p> <p>If the Apply Academic Org Security check box has been selected in PBI Configuration, then the graduate extract is restricted in the same way as the other extract processes; CAS Details records are only included where the user has been granted security access to at least one of the Academic Orgs associated with the CAS record.</p>
Include Applicants	<p>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>.</p>
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><b>Note:</b> 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/>
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>

<b>Field or Control</b>	<b>Description</b>
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>
Graduate File ID Override	<p>If you don't enter an override value, the process automatically generates a value in the format INST_GRADUATE_YYYY_MM_DD_nn, where:</p> <ul style="list-style-type: none"> <li>• INST is your institution code.</li> <li>• nn is a sequence number that begins with 01, and is incremented for new runs of the extract process on that date.</li> </ul> <p>If required, enter a file ID to be used in place of the automatically generated value. The file ID must not have already been used for a Graduate extract. If an extract for the file ID you use 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, Report Extract Data, and Graduate 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"/>

<b>Field or Control</b>	<b>Description</b>
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.

<b>Field or Control</b>	<b>Description</b>
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.

<b>Field or Control</b>	<b>Description</b>
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.

<b>Field or Control</b>	<b>Description</b>
XML Path/File Name	<p>(Optional) 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"> <li>• Windows format: \\server\folder\filename.xml</li> <li>• Unix format: //server/folder/filename.xml</li> </ul> <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"> <li>• Windows format: \\server\folder</li> <li>• Unix format: //server/folder</li> </ul>

## 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, Report, and Graduate Extract XML

A single XML file is created for each File ID for update, report, and graduate 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	Enter the complete path and file name of the primary XSD file. The process uses all of the XSD files to validate your XML file.  The XSD files are available from the UKVI website.

The process validates the XML and checks that it is well formed in the context of the defined schema.

If any errors are reported by the Validate XML process, correct the errors by amending the Reported Value in the Extract Data pages or by amending the CAS Details or related records.

If you have corrected the errors using the Extract Data pages, re-run the Create XML process and validate the file. If you have corrected the errors in the CAS Details or related records, re-run the Create Extract process, re-run the Create XML process and validate the file.

Once the XML file passes schema validation, submit the XML file to SMS via the UKVI portal.

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## 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.

<b>Condition</b>	<b>Status Set By the Import Process</b>
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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Import CAS Details	SAD_PB_IMPC_PRC	<b>Student Admissions &gt; PBI Processing &gt; Import CAS Details</b>	Import the CAS details from the Bulk Export XML file provided by SMS.
CAS Staging Data	SAD_PB_I_CAS	<b>Student Admissions &gt; PBI Processing &gt; CAS Staging Data</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Add Attachment</b>	<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><b>Note:</b> 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/pspres.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>
<b>XML Path/File Name</b>	<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*.

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**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.

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**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.

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**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	<input type="text" value="Error"/>	Extract Date	07/03/2011
CAS Number	E4G7TA2A09E0A6	CAS Status Date	07/03/2011
CAS Status	CANCELLED	Date of Birth	1996-02-21
ID	<input type="text" value="0094"/>	Given Name	Dave
Family Name	Drummond	Passport Number	3546954678
Nationality	AUS	Course Title	Music Performance (BFA)
Application ID	00025100	Expected End Date	12/12/2014
Course ID	MUSIC		
Course Start Date	23/05/2011		

#### CAS Record Details

Record Type:	<input type="text"/>	<a href="#">CAS Details</a>
Academic Career:	<input type="text"/>	<a href="#">Maintain Applications</a>
Student Career Nbr:	0	<a href="#">Student Program/Plan</a>
Application Number:	<input type="text"/>	
Program Number:	<input type="text" value="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.

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## 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.

The screenshot shows the '3C Engine Trigger Results' page for PeopleSoft University. The event ID is 'CASA' and the trigger is 'CAS Applicant'. The table lists six records, all with a status of 'Processed' and a date added of '31/03/2010'. Each record includes a dropdown for ID Type (set to 'Person'), an ID field, a name, a trigger status dropdown, a function dropdown, a variable data field, and a date added field. An 'Add' button is visible at the bottom right of the table.

ID Type	ID	Name	Trigger Status	Function	Variable Data	Date Added
Person	SR13202	Calhoun, David R	Processed	CASN CAS Notf	Variable Data	31/03/2010
Person	SR13203	Chung, Tony	Processed	CASN CAS Notf	Variable Data	31/03/2010
Person	SR13204	Daniel, Christine S	Processed	CASN CAS Notf	Variable Data	31/03/2010
Person	SR13205	Delgado, Phillip R	Processed	CASN CAS Notf	Variable Data	31/03/2010
Person	SR13206	Ferrum, Robin L	Processed	CASN CAS Notf	Variable Data	31/03/2010
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 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

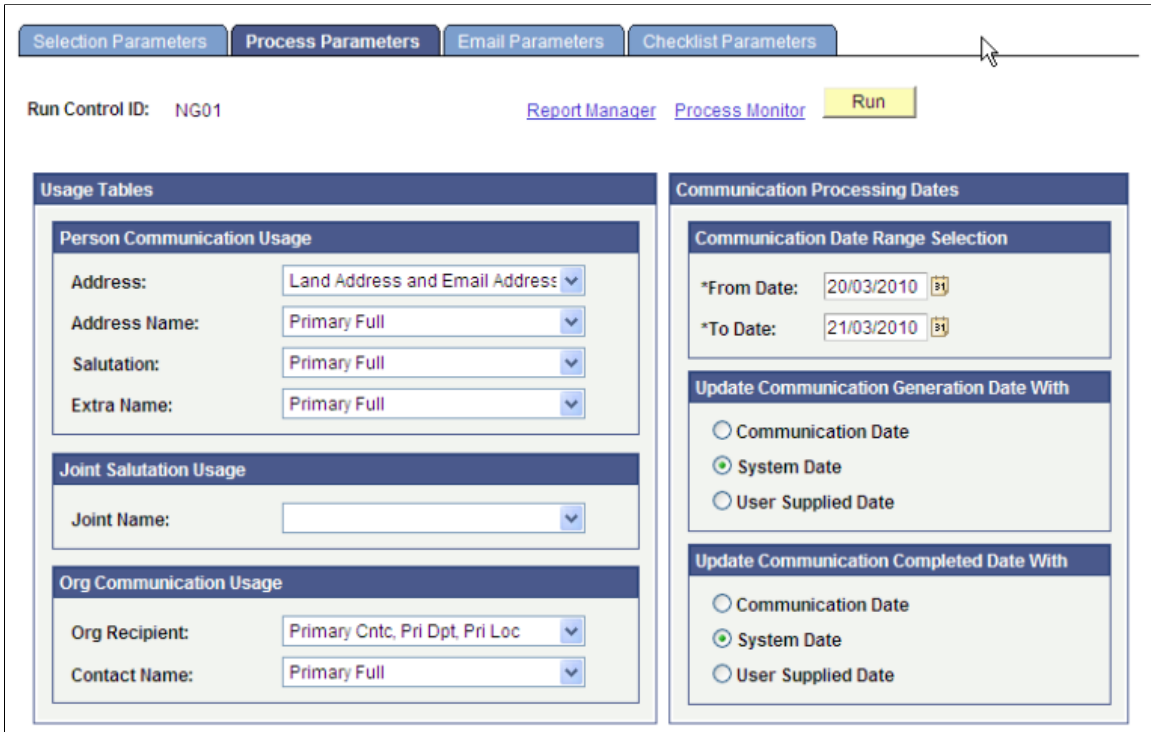
Specified Language: English  Preferred

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).

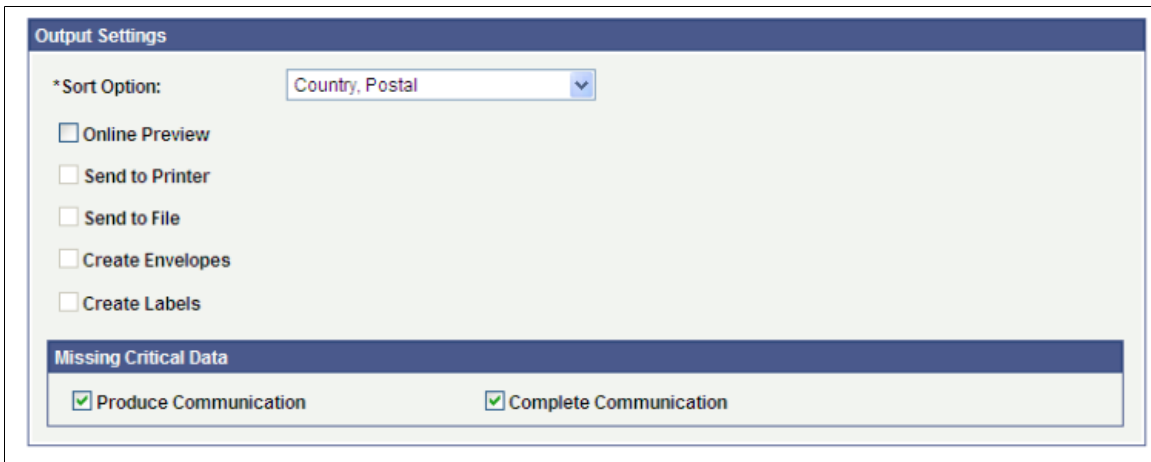


Selection Parameters | **Process Parameters** | Email Parameters | Checklist Parameters

Run Control ID: NG01      [Report Manager](#)   [Process Monitor](#)   **Run**

Usage Tables	Communication Processing Dates
<b>Person Communication Usage</b> Address: Land Address and Email Address Address Name: Primary Full Salutation: Primary Full Extra Name: Primary Full	<b>Communication Date Range Selection</b> *From Date: 20/03/2010 *To Date: 21/03/2010
<b>Joint Salutation Usage</b> Joint Name:	<b>Update Communication Generation Date With</b> <input type="radio"/> Communication Date <input checked="" type="radio"/> System Date <input type="radio"/> User Supplied Date
<b>Org Communication Usage</b> Org Recipient: Primary Cntc, Pri Dpt, Pri Loc Contact Name: Primary Full	<b>Update Communication Completed Date With</b> <input type="radio"/> Communication Date <input checked="" type="radio"/> System Date <input type="radio"/> User Supplied Date

This example illustrates the fields and controls on the Process Parameters page (2 of 2).



**Output Settings**

\*Sort Option: Country, Postal

Online Preview  
 Send to Printer  
 Send to File  
 Create Envelopes  
 Create Labels

**Missing Critical Data**

Produce Communication       Complete Communication

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:

<b>Page</b>	<b>Navigation</b>
PBI Configuration	<b>Student Admissions &gt; PBI Processing &gt; PBI Configuration</b>
Academic Plan PBI Data	<b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Plan Table &gt; PBI Data</b>
Academic Program PBI Data	<b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Academic Program Table &gt; PBI Data</b>
CAS Details	<b>Student Admissions &gt; PBI Processing &gt; CAS Maintenance &gt; CAS Details</b>

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:

<b>Page</b>	<b>Page Element</b>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Date of Birth

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution



<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<i>Page</i>	<i>Page Element</i>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution



<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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 *Preessional B1* and *Preessional 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 *Preessional 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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table ( <b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Campus Table</b> )	Location Code
Location Address ( <b>Set Up Common Objects, &gt; Foundation Tables &gt; Organization &gt; Location</b> )	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:

<b>Page</b>	<b>Page Element</b>
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table ( <b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Campus Table</b> )	Location Code
Location Address ( <b>Set Up Common Objects, &gt; Foundation Tables &gt; Organization &gt; Location</b> )	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:

<b>Page</b>	<b>Page Element</b>
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table ( <b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Campus Table</b> )	Location Code
Location Address ( <b>Set Up Common Objects, &gt; Foundation Tables &gt; Organization &gt; Location</b> )	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:

<b>Page</b>	<b>Page Element</b>
PBI Configuration	Main Site

<b>Page</b>	<b>Page Element</b>
CAS Details	Reported Site
Campus Table ( <b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Campus Table</b> )	Location Code
Location Address ( <b>Set Up Common Objects, &gt; Foundation Tables &gt; Organization &gt; Location</b> )	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:

<b>Page</b>	<b>Page Element</b>
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table ( <b>Set Up SACR &gt; Foundation Tables &gt; Academic Structure &gt; Campus Table</b> )	Location Code
Location Address ( <b>Set Up Common Objects, &gt; Foundation Tables &gt; Organization &gt; Location</b> )	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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<i>Page</i>	<i>Page Element</i>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
CAS Details	First Year Course Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as  $\theta$ , if the First Year Course Fees is  $\theta$  on the CAS Details page.

## Course Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <CourseFeesPaidToDate>

Mandatory: No

Pages Used:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
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:

<i>Page</i>	<i>Page Element</i>
CAS Details	Accommodation Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

---

**Note:** An error message is logged if none of the Fees Paid fields contains a value greater than zero.

---

## Boarding Fees Paid

Update Extract Data page: Financial Details

XML Tag: <BoardingFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	Boarding Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

---

**Note:** An error message is logged if none of the Fees Paid fields contains a value greater than zero.

---

## Report File Fields

This section discusses how the Create Extract process derives the field values for the Report extract.

### Report File ID

Report Extract Data page: Header

XML Tag: <BulkReportingID>

Mandatory: Yes

Pages Used:



<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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:

<b>Page</b>	<b>Page Element</b>
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*.

## Chapter 30

# (NLD) Managing Studielink

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## 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



## Chapter 31

# (NLD) Managing the BRON Interface

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## 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



## Chapter 32

# Evaluating Applicants

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## 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:

<b><i>Task</i></b>	<b><i>To execute automatically</i></b>	<b><i>To execute manually</i></b>
Assign evaluation codes.	Evaluation Code Assignment process ADEVALCD.SQR	General Evaluations component or Application Evaluations component.



<b>Task</b>	<b>To execute automatically</b>	<b>To execute manually</b>
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.

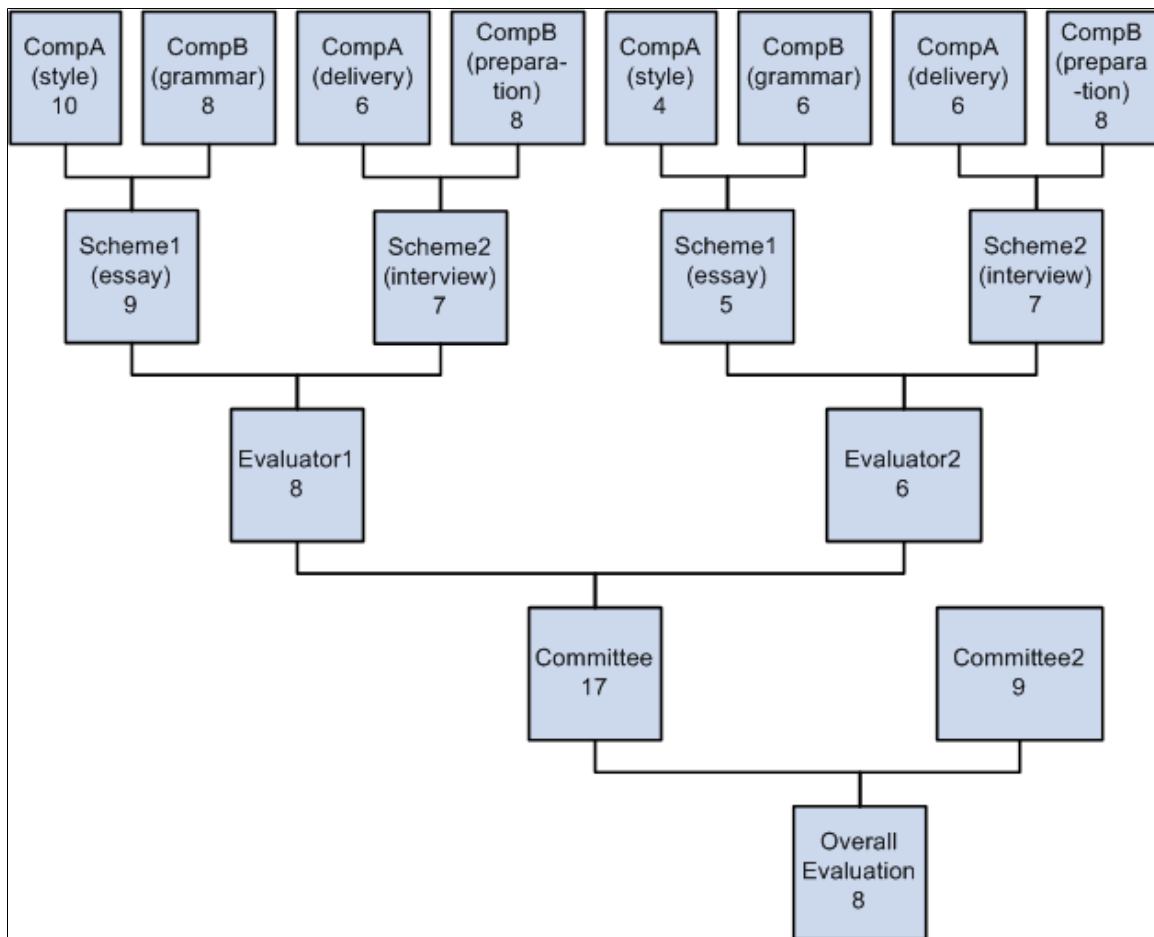
Application evaluations are tied to a career, program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the career and program to which they are applying.

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"> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; General Evaluations</b></li> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; Student Admissions &gt; Application Evaluation &gt; General Evaluations</b></li> </ul>	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 <b>Link Materials</b> 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"> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; General Evaluations &gt; General Evaluation Committee</b></li> <li>• <b>Student Admissions &gt; Application Evaluation &gt; General Evaluations &gt; General Evaluation Committee</b></li> </ul>	Assign general evaluation committees to a general evaluation. The overall ratings of the committees you assign are also stored on this page.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Evaluators	GENL_EVAL3	<ul style="list-style-type: none"> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; General Evaluations &gt; General Evaluators</b></li> <li>• <b>Student Admissions &gt; Application Evaluation &gt; General Evaluations &gt; General Evaluators</b></li> </ul>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Eval Code</b> (evaluation code)	Select the evaluation code to be used to evaluate this person. Other fields on this page (such as <b>Scheme</b> ) 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.

<b>Field or Control</b>	<b>Description</b>
<b>Eval Nbr</b> (evaluation number)	The evaluation number default is 1 for the first general evaluation you enter, 2 for the second, and continues incrementally.
<b>Eval Stat</b> (evaluation status)	Select the current evaluation status of this general evaluation. Define evaluation status codes on the Evaluation Status Table page.
<b>Eval Dt</b> (evaluation date)	The default for the evaluation date is your system date.
<b>Scheme</b>	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.
<b>Overall Rating</b>	<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 <a href="#">Evaluating Applicants Business Process</a>.</p> <hr/> <p><b>Note:</b> This value does not include rating values that were retrieved and calculated by the Evaluation Calculation process.</p> <hr/>
<b>Link Materials</b>	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.
<b>View Materials</b>	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.
<b>Go</b>	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:	UGINTERWW	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

<b>Field or Control</b>	<b>Description</b>
<b>Committee</b>	<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><b>Note:</b> To create general evaluations, you must assign an evaluation committee. However, an evaluation committee can be made up of only one person.</p> <hr/>
<b>Evaluation Status</b>	Select the evaluation status reflecting the current status of this committee's evaluation. Define evaluation status codes on the Evaluation Status Table page.
<b>Evaluation Date</b>	The default for the evaluation date is the system date.
<b>Overall Rating</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Evaluator ID</b>	<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> <hr/> <p><b>Note:</b> You cannot enter evaluators under an evaluation code unless you have first entered a committee on the General Evaluation Committee page.</p>
<b>Committee Role</b>	<p>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.</p>
<b>Evaluation Status</b>	<p>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.</p>
<b>Evaluation Date</b>	<p>The default for the evaluation date is your system date.</p>

<i>Field or Control</i>	<i>Description</i>
<b>Overall Rating</b>	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](#)

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## 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"> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; General Evaluator Rating</b></li> <li>• <b>Student Admissions &gt; Application Evaluation &gt; General Evaluator Rating</b></li> </ul>	<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"> <li>• <b>Student Recruiting &gt; Evaluate Prospects &gt; General Evaluator Rating &gt; General Evaluator Detail</b></li> <li>• <b>Student Admissions &gt; Application Evaluation &gt; General Evaluator Rating &gt; General Evaluator Detail</b></li> </ul>	<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 with the following details:

- Page Headers:** Sandra Kim, AA0012
- Eval Code:** UGINTERWW Undergraduate Interviews
- Eval Nbr:** 1
- Committee:** UGINWW UG Interview Committee
- Evaluator ID:** AD1040 Sullivan, Irving
- \*Scheme:** UGINTERWW Undergraduate Interviews
- Evaluation Status:** Committee
- Evaluation Date:** 10/07/2004
- Overall Rating:** (Empty field)
- Comments:** (Large text area)
- Transfer To:** General Materials

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.

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Status</b>	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.
<b>Evaluation Date</b>	The default for the evaluation date is your system date.
<b>Overall Rating</b>	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

<b>Eval Code:</b>	UGINTERWW	Undergraduate Interviews
<b>Eval Nbr:</b>	1	
<b>Committee:</b>	UGINWW	UG Interview Committee

Find | View All First 1 of 2 Last

<b>Evaluator ID:</b>	AD1040	Sullivan, Irving
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Find | View All First 1 of 1 Last

<b>Scheme:</b>	UGINTERWW	Undergraduate Interviews
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Find | View All First 1 of 3 Last

<b>*Component:</b>	ACADP	Academic Potential <span style="float: right;">+ -</span>
<b>Type:</b>	INDV	Individual
<b>Rating Value:</b>	5	Excellent
<b>Comments:</b>		

**Transfer To:** General Materials Go

<b>Field or Control</b>	<b>Description</b>
<b>Component and Type</b>	The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types.
<b>Rating Value</b>	<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>

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## 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	<b>Student Admissions &gt; Application Evaluation &gt; Application Evaluation</b>	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	<b>Student Admissions &gt; Application Evaluation &gt; Application Evaluation &gt; Overall Rating</b>	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	<b>Student Admissions &gt; Application Evaluation &gt; Application Evaluation &gt; Committee Rating</b>	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	<b>Student Admissions &gt; Application Evaluation &gt; Application Evaluation &gt; Evaluator Rating</b>	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.

The screenshot shows the 'Application Evaluation' page with the following details:

- Application Evaluation** (Active tab) | Overall Rating | Committee Rating | Evaluator Rating
- Name: Kelly Harris | ID: AD9201
- Academic Career: Undergraduate | Application Nbr: 00024159
- Prog Nbr: 0 | Academic Program: Liberal Arts Undergraduate
- Search: Find | View All | First | 1 of 1 | Last
- \*Evaluation Code: UGAPPLFYR (UG Applicants)
- \*Evaluation Nbr: 1 |  Recalculate Evaluation
- Evaluation** | **Rating**
- Eval Stat: Progress (dropdown) | Committee Rating ID: UGCOMMFYR
- Eval Dt: 10/25/2004 (calendar icon) | Overall Rating ID: ADMAVG
- Comment: [Empty text area]
- Transfer To: Application Evaluator Ratings (dropdown) | Go (button)

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Code</b>	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 <a href="#">Assigning Evaluation Codes to Applications in Batch</a> .
<b>Evaluation Nbr</b> (number)	The evaluation number automatically populates as 1 for the first application evaluation you enter, 2 for the second, and continues incrementally.
<b>Eval Stat</b> (evaluation status)	Select the evaluation status reflecting the current status of this application evaluation. Define evaluation status codes on the Evaluation Status Table page.
<b>Eval Dt</b> (evaluation date)	The default evaluation date is your system date. Edit the date.

<b>Field or Control</b>	<b>Description</b>
<b>Committee Rating ID</b>	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.
<b>Overall Rating ID</b>	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.
<b>Recalculation Evaluation</b>	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.
<b>Go</b>	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		<b>Overall Rating</b>		Committee Rating		Evaluator Rating	
Kelly Harris				<b>ID</b>		AD9201	
<b>Academic Career:</b> Undergraduate		<b>Application Nbr:</b> 00024159					
<b>Prog Nbr:</b> 0		<b>Academic Program:</b> Liberal Arts Undergraduate					
<input type="checkbox"/> <b>New Course</b>		<input type="checkbox"/> <b>New Summary</b>		<input type="checkbox"/> <b>New General Material</b>			
<input type="checkbox"/> <b>New Subject</b>		<input type="checkbox"/> <b>New Test Score</b>		<input type="checkbox"/> <b>Automatic Update Process</b>			
Find   View All First 1 of 1 Last							
<b>Evaluation Code:</b> UGAPPLFYR		UG Applicants					
<b>Evaluation Nbr:</b> 1							
<b>Rating Component</b>		<b>Rating Value</b>		<b>Final Value</b>		<b>Evaluated</b>	
AVG Admissions Average		0.0000		<input checked="" type="checkbox"/>		<input type="checkbox"/> + -	
<b>Transfer To:</b> Application Evaluator Ratings						Go	

<i>Field or Control</i>	<i>Description</i>
<b>New Course, New Subject, New Summary, New Test Score, and New General Material</b>	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.
<b>Automatic Update Process</b>	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.
<b>Rating Component</b>	The rating components of the rating scheme that you entered in the <b>Overall Rating ID</b> field on the Application Evaluation page appear. You can add new rating components.
<b>Rating Value</b>	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.
<b>Final Value</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Evaluated</b>	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.
<b>Go</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Committee</b>	The system populates the committee if the evaluation code for this application evaluation has an evaluation committee assigned to it. You can add committees.
<b>Committee Type</b>	The type of the committee that you select appears.

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Status</b>	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.
<b>Evaluation Date</b>	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.
<b>Overall Rating</b>	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.
<b>Go</b>	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:**  Sullivan, Irving

**Committee Role:**  Staff member of Committee

**Evaluation Status:**  **Evaluation Date:**

**Overall Rating:**

**Comment:**

**Transfer To:** Application Evaluator Ratings Go

<b>Field or Control</b>	<b>Description</b>
<b>Evaluator ID</b>	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. <hr style="border: 0.5px solid black;"/> <p><b>Note:</b> You cannot enter evaluators under an evaluation code unless you have first entered a committee on the Committee Rating page.</p>
<b>Committee Role</b>	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.
<b>Evaluation Status</b>	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.
<b>Evaluation Date</b>	The default for the evaluation date is your system date.

<i>Field or Control</i>	<i>Description</i>
<b>Overall Rating</b>	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	<b>Student Admissions &gt; Application Evaluation &gt; Evaluate Application Materials &gt; Application Evaluator Ratings</b>	Enter evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.)
Application Evaluator Detail	ADM_RATING2	<b>Student Admissions &gt; Application Evaluation &gt; Evaluate Application Materials &gt; Application Evaluator Ratings &gt; Application Evaluator Detail</b>	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.

The screenshot shows the 'Application Evaluator Detail' page. At the top, there are tabs for 'Application Evaluator Rating' and 'Application Evaluator Detail'. Below the tabs, the evaluator's name 'Janis Richards' and ID 'AD1008' are displayed. A summary section includes: Academic Career: Undergraduate; Application Nbr: 00022603; Prog Nbr: 0; Academic Program: Liberal Arts Undergraduate; Evaluation Code: UG Appl; Evaluation Nbr: 1; and Committee: UG Admissions Committee. Below this is a search bar with 'Find | View All' and pagination 'First 1 of 2 Last'. The main section is titled 'Evaluator ID: AD1040' with a search icon. It contains a sub-section with 'Find | View All' and pagination 'First 1 of 1 Last'. This sub-section includes: \*Scheme: UGCOMMFYR (with a search icon) and UG Application Committee; Evaluation Status: Final (dropdown); Evaluation Date: 09/22/2000 (calendar icon); Overall Rating: 3.67 (input field); and Comments: a text area. At the bottom, there is a 'Transfer To:' dropdown set to 'Application Evaluations' and a 'Go' button.

<b>Field or Control</b>	<b>Description</b>
<b>Scheme</b>	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.
<b>Evaluation Status</b>	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.
<b>Evaluation Date</b>	The default for the evaluation date is your system date.
<b>Overall Rating</b>	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

**Academic Career:** Undergraduate

**Prog Nbr:** 0

**Evaluation Code:** UG Appl

**Committee:** UG Admissions Committee

**ID** AD1008

**Application Nbr:** 00022603

**Academic Program:** Liberal Arts Undergraduate

**Evaluation Nbr:** 1

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(s) + -

**Type:**  Individual

**Rating Value:**  Good

**Comments:**

**Transfer To:**

Go

<b>Field or Control</b>	<b>Description</b>
<b>Component and Type</b>	The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types.
<b>Rating Value</b>	<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

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## Understanding How to Evaluate Applicants Using Automatic Processing

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**Important!** Mass Change is a deprecated product. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see *PeopleTools: Application Engine*.

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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.

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**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.

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## Related Links

[Understanding the Evaluating Applicants Business Process](#)

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# Assigning Evaluation Codes to Applications in Batch

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**Important!** Mass Change is a deprecated product. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see *PeopleTools: Application Engine*.

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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.

The screenshot shows the 'Criteria and Defaults' page for a 'Mass Change Definition: Application Prog Update Select'. The page is divided into several sections:

- SQL Statement:** A search bar and navigation controls (Find, View All, First, 1 of 1, Last).
- Execution Seq:** 1, with a description field containing 'Select Applicant Criteria'.
- Criteria:** A section with two rows of criteria:
 

Field	Field Value
Academic Level Equal To	10
Academic Career Equal To	UGRD
- Defaults:** A table with two rows:
 

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	<b>Student Admissions &gt; Processing Applications &gt; Evaluations &gt; Assign Evaluation Codes</b>	<p>Assign the evaluation code to the applications that you selected through the mass change process.</p> <hr/> <p><b>Note:</b> PeopleSoft delivers a sample SQR for assigning evaluation codes, ADEVALCD.SQR. Your institution can modify this SQR to fit its specific needs.</p> <hr/>

## 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:  PeopleSoft University

Program Evaluation Status

\*Evaluation Status:

\*Evaluation Date:

Evaluation Code Status

\*Evaluation Status:

\*Evaluation Date:

Committee Evaluation Status

\*Evaluation Status:

\*Evaluation Date:

### Program Evaluation Status

<i>Field or Control</i>	<i>Description</i>
<b>Evaluation Status</b> and <b>Evaluation Date</b>	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

<i>Field or Control</i>	<i>Description</i>
<b>Evaluation Status</b> and <b>Evaluation Date</b>	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>
<b>Evaluation Status</b> and <b>Evaluation Date</b>	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.

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## 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	<b>Student Admissions &gt; Processing Applications &gt; Evaluations &gt; Application Materials Extract</b>	<p>Assign application materials to applications in batch. Application materials are used to evaluate applicants.</p> <hr/> <p><b>Note:</b> PeopleSoft delivers a sample SQR for extracting application materials, ADMTLEXT. Your institution can add to or edit the SQCs for this SQR.</p> <hr/>

## 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>
<b>Evaluation Code</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Admit Term</b>	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.
<b>Evaluation Status</b>	Select an evaluation status. The process only extracts application materials for applications with the evaluation status that you select. The process looks at the <b>Evaluation Status</b> field on the Application Program Data page.
<b>Institution</b>	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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Evaluation Calculation	RUNCTL_APPEVAL2	<b>Student Admissions &gt; Processing Applications &gt; Evaluations &gt; Evaluation Calculation</b>	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:**  Committee Eval In Progress

**To:**  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.

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**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.

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<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Evaluation Code</b>	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.



<b>Field or Control</b>	<b>Description</b>
<b>Admit Term</b>	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.
<b>Institution</b>	Enter an institution. The process only evaluates applications for this institution.
<b>From</b>	The process only evaluates applications that have the evaluation status you select. This is the evaluation status listed on the Application Evaluation page.
<b>To</b>	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.

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## 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	<b>Student Admissions &gt; Processing Applications &gt; Update Applications &gt; Application Status Update</b>	<p>Perform a background process to update the program evaluation status and program actions of applications that have been evaluated.</p> <p>See <a href="#">Understanding How to Evaluate Applicants Using Automatic Processing</a></p> <hr/> <p><b>Note:</b> 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	<b>Student Admissions &gt; Application Fees and Deposits &gt; App Deposit Fees Process</b>	<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>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Activate Application	RUNCTL_AD_SR	<b>Student Admissions</b> > <b>Processing Applications</b> > <b>Update Applications</b> > <b>Activate Applicants</b>	<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

<b>*Academic Institution:</b>	<input type="text" value="PSUNV"/>	PeopleSoft University
<b>*Evaluation Code:</b>	<input type="text" value="UGAPPLFYR"/>	UG Applicants
<b>*Academic Career:</b>	<input type="text" value="UGRD"/>	Undergraduate
<b>*Academic Program:</b>	<input type="text" value="LAU"/>	Liberal Arts Undergraduate
<b>*Admit Type:</b>	<input type="text" value="FYR"/>	First-Year
<b>*Admit Term:</b>	<input type="text" value="0550"/>	2005 Fall
<b>*Action Date:</b>	<input type="text" value="10/01/2004"/>	

**Update Program Eval Status**

<b>From:</b> <input type="text" value="IP"/>	<b>To:</b> <input type="text" value="FN"/>
--	--

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Code</b>	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.
<b>Academic Career</b>	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.
<b>Academic Program</b>	Enter an academic program. The process only processes the applications that have the academic program that you select.
<b>Admit Type</b>	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.
<b>Admit Term</b>	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.
<b>Action Date</b>	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.
<b>From</b>	The process only process applications that have the evaluation status you select.
<b>To</b>	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:  PeopleSoft University

Academic Career	Admit Term	Admit Type
<input type="text" value="UGRD"/> Undergrad	<input type="text" value="0550"/> 2005 Fall	<input type="text" value="FYR"/> First-Year

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

[Display Deposit Fees](#)

<b>Field or Control</b>	<b>Description</b>
<b>Academic Career</b>	Enter an academic career. The process only calculates enrollment deposits for applications that have the academic career that you select.
<b>Admit Term</b>	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.
<b>Admit Type</b>	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

<b>Institution</b>	<b>*Career</b>	<b>Acad Prog</b>	<b>Admit Term</b>	<b>Admit Type</b>	<b>*As Of Date</b>
PSUNV 🔍	UGRD 🔍	LAU 🔍	0550 🔍	FYR 🔍	First-Year 10/26/2004 📅 + -

**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.

<b>Field or Control</b>	<b>Description</b>
<b>Career</b>	Enter an academic career. The process only matriculates applicants who have the academic career that you select.
<b>Acad Program</b> (academic program)	Enter an academic program. The process only matriculates applicants who have the academic program that you select.
<b>Admit Term</b>	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.
<b>Admit Type</b>	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.
<b>As of Date</b>	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	<b>Student Admissions &gt; Applicant Summaries &gt; Application Evaluation Summary &gt; Overall Results</b>	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	<b>Student Admissions &gt; Applicant Summaries &gt; Application Evaluation Summary &gt; Committee Results</b>	Look up results of committee application evaluations for an applicant.
Evaluator Results	ADM_EVALUATOR_SUMM	<b>Student Admissions &gt; Applicant Summaries &gt; Application Evaluation Summary &gt; Evaluator Results</b>	Look up results of evaluators' evaluations of an application.

Page Name	Definition Name	Navigation	Usage
Evaluator Detail	ADM_EVAL_DTL_SUM	<b>Student Admissions &gt; Applicant Summaries &gt; Application Evaluation Summary &gt; Evaluator Detail</b>	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

**Search On**

**Component:**

**Evaluation Code:**

**Final Value:**

**Eval Stat:**

**Sort By**

**Component**

**Final Value**

**Method**

**Rating Value**

Evaluation Code	Nbr	Eval Stat	Date	Scheme	Component	Value	Final	Method
UG Applicants	1	Final	10/01/2004	UG App Com	Overall	93.3500	<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
<b>Component</b>	Enter a rating component If you want to view summary information by this criterion. When you click the <b>Search</b> button the system retrieves only those components assigned to this application.
<b>Final Value</b>	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.





<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Code</b>	Enter an evaluation code if you want to view summary information based on this criterion. When you click the <b>Search</b> button the system retrieves only those evaluation codes assigned to this application.
<b>Eval Stat</b> (evaluation status)	Select an evaluation status if you want to view summary information by this criterion. When you click the <b>Search</b> button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Application Evaluation page.
<b>Sort By</b>	Select whether you want to view the results by <b>Component, Final Value, Evaluation Method, or Rating Value.</b>
<b>Search</b>	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		
<b>Academic Career:</b> Undergraduate		<b>Application Nbr:</b>	00024160		
<b>Prog Nbr:</b> 0		<b>Academic Program:</b>	Liberal Arts Undergraduate		
<b>Search On</b> <b>Committee:</b> <input type="text"/>  <b>Evaluation Code:</b> <input type="text"/>  <input type="button" value="Search"/>			<b>Sort By</b> <input checked="" type="radio"/> <b>Committee</b> <input type="radio"/> <b>Rating</b> <input type="radio"/> <b>Eval Stat</b>		
<b>Eval Stat:</b> <input type="text"/>					
Committee	Eval Code	Nbr	Eval Stat	Date	Ovr Rating
UG Admissions Committee	UG Applicants	1	Final	10/01/2004	3.67

<b>Field or Control</b>	<b>Description</b>
<b>Committee</b>	Enter an evaluation committee If you want to view committee information by this criterion. When you click the <b>Search</b> button the system retrieves only those committees assigned to this application.

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Code</b>	Enter an evaluation code if you want to view committee information based on this criterion. When you click the <b>Search</b> button the system retrieves only those evaluation codes assigned to this application.
<b>Eval Stat</b> (evaluation status)	Select an evaluation status if you want to view committee information by this criterion. When you click the <b>Search</b> button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Committee Evaluation page.
<b>Committee, Rating, and Eval Stat</b> (evaluation status)	Select whether you want to view the results of your summary information by committee, rating, or evaluation status.
<b>Search</b>	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

**Search On**

**Committee:**  **Evaluation Code:**  Search

**Evaluator:**  **Eval Stat:**

**Sort By**

**Committee**

**Evaluator**

**Rating**

**Eval Stat**

Evaluator Name	Committee	Evaluation Code	Nbr	Eval Stat	Date	Ovr Rating
Sullivan, Irving	UG Admissions Committee	UG Applicants	1	Progress	10/01/2004	3.67
Dern, Bill	UG Admissions Committee	UG Applicants	1	Progress	10/01/2004	3.67

<b>Field or Control</b>	<b>Description</b>
<b>Committee</b>	Enter an evaluation committee If you want to view evaluator result information by this criterion. When you click the <b>Search</b> button the system retrieves only those committees assigned to this application.

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Code</b>	Enter an evaluation code if you want to view evaluator result information based on this criterion. When you click the <b>Search</b> button the system retrieves only those evaluation codes assigned to this application.
<b>Evaluator</b>	Enter an evaluator if you want to view evaluator result information for a specific evaluator.
<b>Eval Stat</b> (evaluation status)	Select an evaluation status if you want to view evaluator result information by this criterion. When you click the <b>Search</b> button the system retrieves evaluator result information for those evaluations that have matching evaluation statuses on the Evaluator Rating page.
<b>Committee, EvaluatorRating, and Eval Stat</b> (evaluation status)	Select whether you want to view the results of your summary information by committee, evaluator, rating, or evaluation status.
<b>Search</b>	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:**  **Evaluation Code:**  Search

**Component:**  **Evaluator:**

**Sort By**

- Committee**
- Component**
- Evaluator**
- Rating Value**

Evaluator Name	Committee	Evaluation Code	Nbr	Scheme	Component	Value
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	5
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	3
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	4
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	4
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3

<b>Field or Control</b>	<b>Description</b>
<b>Committee</b>	Enter an evaluation committee If you want to view evaluator detail information by this criterion. When you click the <b>Search</b> button the system retrieves only those committees assigned to this application.
<b>Evaluation Code</b>	Enter an evaluation code if you want to view evaluator detail information based on this criterion. When you click the <b>Search</b> button the system retrieves only those evaluation codes assigned to this application.
<b>Component</b>	Enter a rating component If you want to view evaluator detail information by this criterion. When you click the <b>Search</b> button the system retrieves only those components assigned to this application.
<b>Eval Stat</b> (evaluation status)	Enter an evaluation status if you want to view evaluator detail information by this criterion. When you click the <b>Search</b> button the system retrieves evaluator detail information for those evaluations that have matching evaluation statuses on the Application Evaluator Detail page.
<b>Committee, Component, Evaluator, and Rating Value</b>	Select whether you want to view the results of your summary information by committee, component, evaluator or rating value.
<b>Search</b>	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.

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## 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	<b>Student Admissions &gt; Applicant Summaries &gt; Applicant Progression</b>	<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

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## 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.

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## 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	<b>Student Admissions &gt; Internship Contracts NLD &gt; Organization Types &gt; BPV Organization Type</b>	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Address Types	SAD_ADDRESS_TP_NLD	<b>Student Admissions &gt; Internship Contracts NLD &gt; Address Types &gt; Address Types</b>	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	<b>Student Admissions &gt; Internship Contracts NLD &gt; Campus Telephone Numbers &gt; BPV Campus Telephone</b>	Define campus telephone numbers. Campus telephone numbers are printed on top of the BPV contract.
BPV Appendix	SAD_BPV_NBL_NLD	<b>Student Admissions &gt; Internship Contracts NLD &gt; BPV Appendix &gt; BPV Appendix</b>	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	<b>Student Admissions &gt; Internship Contracts NLD &gt; BPV User Settings &gt; BPV User Settings</b>	Set up BPV user security to allow users to work with BPV contract functionality.
BPV Set-up	SAD_BPV_INST_NLD	<b>Student Admissions &gt; Internship Contracts NLD &gt; BPV Set-up &gt; BPV Set-up</b>	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**).





<i>Field or Control</i>	<i>Description</i>
<b>Last Contract Number Assigned</b>	Use this field to maintain the last BPV contract number assigned.

## Defining BPV Organization Locations

This section discusses how to:

- Define BPV organization locations.
- Review or update BPV organization locations.
- Define accreditation information for BPV organizations.

## Pages Used to Define BPV Organization Locations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Location Detail	ORG_LOCATIONS	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Internship Contracts NLD &gt; Organization Locations &gt; Location Detail</b></li> <li>• <b>Campus Community &gt; Organization &gt; Create/Maintain Organization &gt; Organization Locations &gt; Location Detail</b></li> </ul>	Add a BPV organization location.
BPV Organization Locations	SAD_BPV_OLC_NLD	<ul style="list-style-type: none"> <li>• <b>Student Admissions &gt; Internship Contracts NLD &gt; BPV Locations &gt; BPV Organization Locations</b></li> <li>• Click the <b>Edit BPV Location Address</b> link on the Location Detail Page.</li> </ul>	Review or update the locations for BPV organizations that you added on the Location Details page.
BPV Accreditation	SAD_BPV_ACC_NLD	<b>Student Admissions &gt; Internship Contracts NLD &gt; BPV Locations &gt; BPV Accreditation</b>	Define accreditation information for BPV organization locations.



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 with the following details:

- Org ID:** SABPV001
- BPV Organization:** BPV Organization
- Primary Location:** 1 Location 1
- Organization Address:**
  - Location:** 2
  - Country:** Netherlands
  - Address:** location 2, Location ave 2 2, 1002 AA Amsterdam
- Organization type:** [Searchable field]
- AR number:** [Text field]
- Address Type:** BUSN [Searchable],  Main address
- Effective Date:** 01/01/1900 [Calendar icon]
- Country:** NLD [Searchable], Netherlands
- Status:** Active [Dropdown]
- Address:** location 2, Location ave 2 2, 1002 AA Amsterdam
- Buttons:** Find, View All, First, 2 of 2, Last (for Organization Address); Find, View All, First, 1 of 1, Last (for Address Type); Edit Address (for Address); Copy Default Location Address (highlighted)

**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).

<i>Field or Control</i>	<i>Description</i>
<b>Organization type</b>	Select an organization type for this location. Organization types are defined on the BPV Organization Type page.

<b>Field or Control</b>	<b>Description</b>
<b>AR number</b> (account receivable number)	Enter the account receivable number of the location.
<b>Address Type</b>	Enter the address type for this location. Define address types on the Address Types page.
<b>Main address</b>	Select the primary address for this location.
<b>Copy Default Location Address</b>	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.

The screenshot shows the 'BPV Accreditation' page for organization 'SABPV001' and location 'Location 1'. It features a table with the following data:

'HEGIS Code	Appr by nat org	*Start Date	End Date
10039	Administrative Employee Accredited	01/01/2000	01/01/2020

<b>Field or Control</b>	<b>Description</b>
<b>Knowledge centre id</b>	Enter the knowledge center or external organization at this location for which to select accreditation.

<b>Field or Control</b>	<b>Description</b>
<b>External contract</b>	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.
<b>HEGIS Code</b>	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.
<b>Appr by nat org</b>	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 <b>Accredited</b> check box when creating a contract on the BPV Contract page, only CREBO codes that are identified as accredited here are available.
<b>Start Date and End Date</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Contact Detail	ORG_CONTACTS	<b>Student Admissions &gt; Internship Contracts &gt; NLD &gt; Organization Contacts &gt; Contact Detail</b>	Add contact information for BPV usage.
BPV Contact Person	SAD_BPV_OCN_NLD	<b>Student Admissions &gt; Internship Contracts &gt; NLD &gt; BPV Contact Persons &gt; BPV Contact Person</b>	Define BPV contact persons.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Contact Person Locations	SAD_BPV_OCL_NLD	<b>Student Admissions &gt; Internship Contracts NLD &gt; BPV Contact Persons &gt; Contact Person Locations</b>	Define locations for the contact person.
Contact Person Notes	SAD_BPV_OCN_NT_NLD	<b>Student Admissions &gt; Internship Contracts NLD &gt; BPV Contact Persons &gt; Contact Person Notes</b>	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.

The screenshot displays the 'Contact Detail' page for a contact named 'Bill'. At the top, there are tabs for 'Contact Summary' and 'Contact Detail'. The main header shows 'Org ID: SABPV001' and 'BPV Organization'. Below this, it lists 'Primary Contact: 1 Bill' and 'Title:'. A 'Contact' section shows 'Contact: 1' with navigation controls. The 'Contact History' section includes 'Effective Date: 01/01/1900', 'Status: Active', and a search icon. Below this are fields for 'ID', 'Contact Name: Bill', 'Job Title', 'Contact Type: PRE President', and 'Department' with an 'Add Department' button. The 'Contact Address' section has radio buttons for 'Department', 'Location', 'Address Type', and 'None', along with an 'Address' field and an 'Add Location' button. The 'Electronic Addresses' section contains 'Email ID: bill@bpv.nl' and a 'URL Address' field. The 'Contact Phones' section features a table with columns for 'Phone Type', 'Prefix', 'Phone', 'Extension', and 'Preferred', with a '+ -' control. At the bottom, there are fields for 'Last Update Date/Time' and '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:**

**Name Initials:**     **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.

<i>Field or Control</i>	<i>Description</i>
<b>Contact Nbr</b>	<p>Contacts that appear on this page are active organization contacts. <b>Contact Nbr, ID, Contact Name, Job Title, Contact Type,</b> and <b>Email Address</b> 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>
<b>Location Nbr</b> (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	<b>Student Admissions</b> > <b>Internship Contracts</b> <b>NLD</b> > <b>BPV Contracts</b> > <b>BPV Contract</b>	Create a BPV contract.
BPV Location Detail	SAD_BPV_OLC_SP_NLD	Click the <b>Location Nbr</b> button on the BPV Contract page.	View remarks about the BPV location.
BPV Appendix	SAD_BPV_C_BIJL_NLD	<b>Student Admissions</b> > <b>Internship Contracts</b> <b>NLD</b> > <b>BPV Contracts</b> > <b>BPV Appendix</b>	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.

The screenshot shows the 'BPV Contract' page with the following fields and controls:

- External Org ID:** SABPV001 (BPV Internship Organization)
- Location Nbr:** 1 (Location 1)
- Accredited** (Delete button)
- '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:** (empty)
- Contact nbr 2:** (empty)
- 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

<i>Field or Control</i>	<i>Description</i>
<b>Accredited</b>	Select to limit the values in the <b>HEGIS Code</b> field to CREBO codes for which this location is accredited. Select <b>Accreditation</b> on the BPV Accreditation page.
<b>Location Nbr</b> (location number)	Select a BPV organization location. Define organization locations on the BPV Organization Locations page.
<b>Location Nbr</b> (location number)	Click this button to view location notes for this location. Define location notes on the BPV Location Notes page.
<b>HEGIS Code</b>	Select a CREBO code for this contract. Only those CREBO codes for which you are authorized to create contracts is available.

<b>Field or Control</b>	<b>Description</b>
<b>Outsourcing company</b>	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.
<b>Outsourcing loc</b> (outsourcing location)	Enter a location number for the outsourcing company.
<b>Internal contract</b>	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.
<b>External contract</b>	Enter the external contract number, if applicable.
<b>Start Date and End Date</b>	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.
<b>Mailing location</b>	Enter the location number that will be used for correspondence. Locations are defined on the BPV Organization Location page.
<b>Instructor ID</b>	Select the practicum tutor of the institution. Define instructors on the Instructor/Advisor Table page.
<b>Contact Nbr</b> (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.
<b>Contact nbr 2</b>	Select a second contact. Only contacts for this location appear as options.
<b>Contract length in weeks</b>	<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> $N \text{ (number of weeks) } = (\text{end date} - \text{start date}) / 7$ $X \text{ (number of weeks after deduction of full years) } = \max(40, N \text{ mod } 52)$ $Y \text{ (number of full years) } = \text{Int}(N / 52) * 40$ $\text{Contract length in weeks} = X + Y$

<b>Field or Control</b>	<b>Description</b>
<b>Number of hours per week</b>	Enter the number of hours per week of this contract.
<b>Maximum Nbr of Students</b> (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>
<b>Plan</b>	Indicate whether this contract is valid for <i>BOL</i> , <i>BBL</i> , or <i>Both</i> .
<b>Delete</b>	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:**

<b>Field or Control</b>	<b>Description</b>
<b>Appendix document</b>	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.
<b>Add Appendix</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Match Contracts	SAD_BPV_MATCH_NLD	<b>Student Admissions</b> > <b>Internship Contracts</b> <b>NLD</b> > <b>BPV Match Contracts</b> > <b>Match Contracts</b>	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 <b>Detail Panel</b> 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 <b>Detail Panel</b> 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 <b>Appendix</b> 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

**HEGIS Code:**  Agriculture

**Org ID:**

**Organization type:**

**Open Only**

Selected BPV Locations										
Customize   Find   View All    First 1 of 1 Last										
	External Org ID	Description	Internal contract	Description	Plan	Start Date	End Date	Max	Open Seats	Detail Panel
1	SABPV001	Location 1	0010002	Whatever	Both	09/01/2001	12/31/2001	2	2	

<i>Field or Control</i>	<i>Description</i>
<b>HEGIS Code</b>	Select a CREBO code (stored in the HEGIS table) to select contracts for the CREBO code you select.
<b>Org ID</b> (organization ID)	Select an organization ID to limit contracts by organization.
<b>Organization type</b>	Select an organization type to limit contracts by organization type.
<b>Open Only</b>	Select this check box to retrieve only contracts that have vacancies.
<b>Select</b>	Click this button to search for contracts based on the criteria you enter.
<b>Deselect</b>	Click this button to clear the page.
<b>Detail Panel</b>	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: <input type="text" value="SRN013"/>	GELDER,NICOLAAS J		
*EmpIID: <input type="text" value="SRN011"/>	FEITER,TEUNIS W		

<i>Field or Control</i>	<i>Description</i>
<b>EmpIID</b> (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 <b>Plan</b> field (BOL/BBL/Both) on the BPV contract.
<b>Detail Panel</b>	Click the <b>Detail Panel</b> 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

<b>EmpID:</b> SSRNL00011	Kaassnijder,Klaas	<b>Action Date:</b> 02/10/2009	
<b>External Org ID:</b> SABPV001	BPV Internship Organization	<b>User ID:</b> SAMPLE	
<b>Internal contract:</b> 0010003	Internship for Administrative Employee students		
<b>HEGIS Code:</b> 10039	Administrative Employee		
<b>Location Nbr:</b> 1	Location 1		

---

**Outsourcing company:**

**Outsourcing Location:**

---

<b>*Institution:</b> <input type="text" value="PSNLD"/> PeopleSoft University - NLD	<b>*Program:</b> <input type="text" value="R012"/> BOL Administrative Specialist
<b>*Career:</b> <input type="text" value="BOL"/> Vocational Training (NLD)	<b>*Acad Load:</b> <input type="text" value="0"/>
<b>*Career Nbr:</b> <input type="text" value="0"/>	
<b>*Start Date:</b> <input type="text" value="01/01/2000"/>	<b>*End Date:</b> <input type="text" value="01/01/2020"/>
<b>Status:</b> <input type="text" value="Active"/>	<b>Printed:</b> <input type="text" value="Not Printed"/>
<b>Instructor ID:</b> <input type="text" value="AA0002"/> Acosta,Paul	
<b>Contact Nbr:</b> <input type="text"/>	<b>Contract length in weeks:</b> <input type="text" value="12"/>
<b>Contact nbr 2:</b> <input type="text"/>	<b>Number of hours per week:</b> <input type="text" value="16"/>
<b>Appendix</b>	<b>Total nbr of BPV Hours</b> 192

Administrative internships should include at least the following tasks

- Writing business letters
- conducting business phone calls

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	<b>Student Admissions</b> > <b>Internship Contracts</b> <b>NLD</b> > <b>BPV Match Students</b> > <b>Match Students</b>	Search for and select students to which to link contracts.
BPV Student Detail	SAD_BPV_STD1_NLD	Click the <b>Detail Panel</b> 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

**\*EmpID:**  🔍 BUUREN,RONALD

**\*Institution:**  🔍 PeopleSoft University - NLD

**\*Career:**  🔍 Vocational Training (NLD)

**\*Program:**  🔍 Agriculture

**Open Only**

**Group:**  🔍

**Approved Academic Load:**

BUUREN,RONALD

PeopleSoft University - NLD

Vocational Training (NLD)

Agriculture

Selected Participants					
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

**EmpID:** SRN109 BUUREN,RONALD

**Career:** BOL Vocational Training (NLD)

**Program:** R002 Agriculture

**Approved Academic Load:** Vocational Training (NLD)

BPV Student Detail					
	*External Org ID	Internal contract	Detail Panel		
1	<input type="text" value="SABPV001"/> 🔍	<input type="text" value="0010002"/> 🔍	📄	+	-

<b>Field or Control</b>	<b>Description</b>
<b>External Org ID</b> (external organization ID)	Select the external organization that manages hosts the internship.
<b>Internal contract</b>	Select the contract that you want to link to this student.
<b>Detail Panel</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Print BPV Contracts	SAD_BPV_RUN_NLD	<b>Student Admissions &gt; Internship Contracts NLD &gt; Print BPV Contracts &gt; Print BPV Contracts</b>	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

Page Name	Definition Name	Navigation	Usage
Select BPV Contracts	SAD_BPV_CT_SUM_NLD	<b>Student Admissions</b> > <b>Internship Contracts NLD</b> > <b>Select BPV Contracts</b>	Select contracts by the available criteria and enter contract details, including signature dates.
Maintain BPV contracts	SAD_BPV_CTR_D1_NLD	Click the <b>Detail Panel</b> 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**

BPV Internship Organization

Open Only

**Selected Participants** Customize | Find | First 1-2 of 2 Last

Contracts detail		Signatures				
Contract printed	Detail Panel	EmpID	Name	*External Org ID	Organization	Internal contract
1 <input type="checkbox"/>	<input type="button" value="Q"/>	SRN109	BUUREN, RONALD	SABPV001	BPV Internship Organization	0010002
2 <input type="checkbox"/>	<input type="button" value="Q"/>	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:**  BPV Internship Organization **User ID:** SAMPLE

**Internal contract:**  Internship for Administrative Employee students

**HEGIS Code:** 10039 Administrative Employee

**Location Nbr:** 1 Location 1

**Outsourcing company:**  **Outsourcing location:**

---

**Institution:** PSNLD **Career:** BOL **\*Career Nbr:**  **Acad Prog:** R012 **Acad Load:** 0

**\*Start Date:**   **\*End Date:**   **Printed:**

**Status:**

**Instructor ID:**  Acosta,Paul

**Contact Nbr:**  **Contract length in weeks:**

**Contact nbr 2:**  **Number of hours per week:**

**Appendix** **Total nbr of BPV Hours** 192

Administrative internships should include at least the following tasks

- Writing business letters
- conducting business phone calls

Enter contract details if the contract has not already been printed.

<i>Field or Control</i>	<i>Description</i>
<b>Change</b>	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 <b>Change</b> button the system retrieves the correct prompt table views for the <b>External Org ID</b> and <b>Internal Contract</b> 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	<b>Student Admissions &gt; Educational Contracts NLD &gt; Course and Support Agreements</b>	<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 B1      Status: Active ▼       Default + -

\*Description:

**Long Description**

Per standard course agreement guidelines.

<i>Field or Control</i>	<i>Description</i>
<b>Default</b>	Select this option to make the appended document the default agreement.
<b>Long Description</b>	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	<b>Student Admissions &gt; Educational Contracts NLD &gt; Voluntary Contributions</b>	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 31    **Status:** Active ▼     **Default** + -

**\*Description:**

**Item Amount:**

**Description**

Voluntary contribution per semester.

<b>Field or Control</b>	<b>Description</b>
<b>Item Amount</b>	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.
<b>Description</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
OWO Summary	SAD_OWO_CTRSUM_NLD	<b>Student Admissions &gt; Educational Contracts NLD &gt; OWO Summary</b>	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'. A section of filters includes: Institution (text input), Campus (text input), Career (dropdown menu with 'UGRD' selected), Program (text input), Term (text input), Status (dropdown menu), and Group select (dropdown menu). Below the filters is a table with columns: Print, Received, Details, Term, Contract number, Date Signed, EmplID, and Name. The table contains one row with a '1' in the 'Print' column and a minus sign in the 'Name' column. The table header also includes 'OWO details', 'More OWO details', and navigation controls like 'First', '1 of 1', and 'Last'.

<b>Field or Control</b>	<b>Description</b>
<b>Select OWO Contracts</b>	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.
<b>Refresh OWO Selection</b>	Click this button to initiate the selection fields.
<b>EmplID</b>	Enter the employee identification code for the student.
<b>Institution</b>	Enter the academic institution attended by the student.
<b>Acad Prog (academic program)</b>	Enter the academic program of the student.
<b>Campus</b>	Enter the campus with which the student is affiliated.
<b>Career</b>	Select the career with which the student is affiliated.
<b>Term</b>	Select the admit term.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Status</b>	Select <b>Active</b> or <b>Inactive</b> .
<b>Group Select</b>	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

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Print</b>	Select if you want to print the OWO to start automatically after the generation process.
<b>Received</b>	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.
<b>Details</b>	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.
<b>Contract Number</b>	The contract number which is automatically assigned to this contract by the OWO creation process.
<b>Date Signed</b>	This is the date on which the contract has been created.
<b>EmplID</b>	The student ID for which the OWO contract is created.

## More OWO details

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Career</b>	The career with which the student is affiliated.
<b>Program</b>	The program with which the student is affiliated.

<b>Field or Control</b>	<b>Description</b>
<b>Student Career Nbr</b> (student career number)	The student career number with which the student is affiliated.
<b>Campus</b>	The campus with which the student is affiliated.
<b>User ID</b>	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).

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	The status can be changed from <i>Active</i> to <i>Inactive</i> . The <b>Reason</b> field will appear.
<b>Start Date</b>	The matriculation date of the student.
<b>End Date</b>	The matriculation date of the student plus the duration.
<b>Duration (Hours)</b>	The total duration of the OWO agreement in hours.
<b>Old contract nbr</b> (old contact number)	If the OWO contract replaces another OWO contract, the old contract number can be maintained here.
<b>Complete education</b>	If this option is not selected, then all the plans linked to the student will display.
<b>Agreements AOHS</b> (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.
<b>Agreements AVB</b> (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	<b>Student Admissions &gt; Educational Contracts NLD &gt; OWO Setup</b>	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>
<b>Applicant</b>	Only students for whom at least an application entry has been made can be selected during the OWO contract creation process.
<b>Matriculation</b>	Matriculation of a student enrollment is the basis for OWO creation. Only students with a matriculation record can be selected.
<b>Activated for Term</b>	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	<b>Student Admissions &gt; Educational Contracts NLD &gt; Create OWO Contracts</b>	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:**  PeopleSoft University

**Academic Career:**  Undergraduate

**Selection Criteria**

---

**Academic Program:**  Liberal Arts Undergraduate

**Term:**  2004 Fall Qtr

**Campus:**  Main Hacienda Campus

**Group selection:**

**Group:**

**Address Type**  
 Mailing

**Type of Name**  
 Legal

**Replace contracts**

**Current Effective Date**

**Start Date**

**End Date**

The actual process that generates the OWO is a batch process.

<i>Field or Control</i>	<i>Description</i>
<b>Institution</b>	Enter the institution for which you want to create the OWO.
<b>Academic Career</b>	Enter the career for which you want to create the OWO.

<b>Field or Control</b>	<b>Description</b>
<b>Selection Criteria</b>	Select this option if you want to create a contract for just one student. The <b>Student ID</b> and <b>Career Nbr</b> fields display.
<b>Student ID</b>	Select the student ID of the student for whom you want to create the OWO. This field displays only if the <b>Selection Criteria</b> check box is selected.
<b>Career Nbr</b> (career number)	Select the career number of the student for whom you want to create the OWO. This field displays only if the <b>Selection Criteria</b> check box is selected.
<b>Academic Program</b>	Enter the program for which you want to create the OWO.
<b>Term</b>	Enter the admit term for which you want to create the OWO.
<b>Campus</b>	Enter the campus for which you want to create the OWO.
<b>Group selection</b>	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.
<b>Group</b>	Select the group, block, or class section the student is in.
<b>Address Type</b>	Enter the address type that must be used for the student's address on the OWO.
<b>Type of Name</b>	Enter the name type that must be used for the student's name on the OWO.
<b>Replace contracts</b>	Use to set the old contract to inactive, allowing for a new OWO contract to be created.
<b>Current Effective Date</b>	Available when the <b>Replace contracts</b> check box is selected. Only contracts with an end date that is earlier than the entered current effective date are part of the selection
<b>Start Date</b>	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.
<b>End Date</b>	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

Page Name	Definition Name	Navigation	Usage
Print OWO Contracts	SAD_RUN_OWO_NLD	<b>Student Admissions &gt; Educational Contracts NLD &gt; Print OWO Contracts</b>	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:**  PeopleSoft University

**Academic Career:**  Undergraduate

**Selection Criteria**

**Academic Program:**  Liberal Arts Undergraduate

**Term:**  2004 Fall Qtr

**Campus:**  Main Hacienda Campus

**Group selection:**

**Group:**

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

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## 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.

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- 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.

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- 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.

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## 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

Page Name	Definition Name	Navigation	Usage
Program Average Calculation	PROG_AVG_CALC	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Alternate Evaluations &gt; Alternate Average Calculations</b>	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

**Crse Level:** Junior

**Minimum Score:**

**Course Credit Count:** 3.00

**External Academic Level:** 11th Grade

**\*Repeated Grade Processing:** Highest

---

Find | View All
First 1 of 1 Last

**\*Transcript Status:** Final

---

Find | View All
First 1 of 6 Last

*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001 <input type="text"/>	1 <input type="text"/>	<input type="checkbox"/> WildCard ENGL70 <input type="text"/>	<input type="text"/>
Cottonwood High School			

<b>Field or Control</b>	<b>Description</b>
<b>Course Credit Count</b>	<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. 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 <a href="#">Viewing Admissions Calculation Errors</a>.</p>
<b>Crse Level</b> (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 <b>Course Level</b> field on the Courses and Degrees page.</p>
<b>External Academic Level</b>	<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 <b>Acad Level</b> field on the Courses and Degrees page.</p>
<b>Minimum Score</b>	<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 <b>Grade In/ Official</b> 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>
<b>Repeated Grade Processing</b>	<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>
<b>Transcript Status</b>	<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>

<b>Field or Control</b>	<b>Description</b>
<b>External Org ID</b> (external organization ID)	Enter the external organization ID that is associated with the course that is to be used in this average calculation.
<b>Req#</b> (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 <a href="#">Viewing an Average Program Calculation Example</a> .
<b>Wildcard</b>	Select this option if you want to calculate all courses that begin with the value in the <b>School Course Nbr</b> field.  For example, if you entered SCNC in the <b>School Course Nbr</b> field, and selected the <b>Wildcard</b> option, the process would look for any course beginning with SCNC, such as SCNC10, SCNC100, and SCNC15.
<b>School Course Nbr</b> (school course number)	Enter the school course number to be used for this average calculation.
<b>Min Grade</b> (minimum grade)	Enter a minimum grade if you want to override the <b>Minimum Score</b> 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 <input type="text"/> <input type="button" value="Q"/>	2 <input type="text"/>	<input type="checkbox"/> WildCard MATH104 <input type="text"/> <input type="button" value="Q"/> ADV ALGEBRA	<input type="text"/>
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 <input type="text"/> <input type="button" value="Q"/>	3 <input type="text"/>	<input type="checkbox"/> WildCard ENGL100 <input type="text"/> <input type="button" value="Q"/> SPEECH	<input type="text"/>
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      WORLD LIT	
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      BIOLOGY 11	
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) at Cottonwood High School. The page is divided into several sections:

- External Organization:** Shows the school name and ID (000000001).
- External Course Defaults:** A form with various fields:
  - 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: (empty)
  - Term Year: (empty)
  - Course Level: Senior
  - Units Taken: 6.00
  - Grading Basis: GRD (Graded)
- External Courses:** A table with columns: Course Seq, School Subject, Description, Course Nbr, Course Name. One row is visible: 1, MATH, Mathematics, MATH105, PL/SL GEOM.
- External Degrees:** A table with columns: Degree, Description, Degree Date, Data Source, Degree Status, Honors Category. One row is visible: 1, HSD, High School Diploma, School, Complete, None.

At the bottom, there is a 'Transfer To:' dropdown set to 'Course Credits' and 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	<b>Student Admissions</b> > <b>Application Evaluation</b> > <b>Alternate Avg Calc Messages</b>	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.

**Note:** You must enter at least one search parameter in addition to institution.

<b>Field or Control</b>	<b>Description</b>
<b>Instance</b>	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.
<b>ID</b>	Enter a student's identification number. The system looks for any error messages that the system generated when calculating averages for this ID.
<b>Appl Nbr</b> (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.
<b>Eval Code</b> (evaluation code)	Enter an evaluation code. The system looks for error messages that the Evaluation Calculation process generated for this evaluation code.
<b>Component</b>	Enter a rating component. The system looks for error messages that the Evaluation Calculation process generated for this rating component.
<b>Search</b>	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.

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**Note:** An SQC defined by your institution determines the status of the application based on the sum of the final evaluation calculation values.

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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	<b>Student Admissions &gt; Application Evaluation &gt; Avgs for Fin Aid and Records</b>	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"/>

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

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

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## 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`.

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## 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Average Cutoff Table	AVG_CUTOFF_TBL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Alternate Evaluations &gt; Average Cutoff Table &gt; Avg Cutoff Table</b>	Set up the criteria that you want the system to report.
Average Cutoff Report	RUNCTL_ADAVGCUT	<b>Student Admissions &gt; Reports &gt; Average Cutoff Report</b>	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

<p><b>*Program Action:</b> <input type="text" value="ADMT"/> <input type="button" value="🔍"/></p> <p><b>Cutoff Average From Range:</b> <input type="text" value="3.6000"/></p>	<p><b>*Evaluation Code:</b> <input type="text" value="ADMAVG"/> <input type="button" value="🔍"/></p> <p><b>*Cutoff Average To Range:</b> <input type="text" value="4.0000"/></p>
<p><b>*Program Action:</b> <input type="text" value="DENY"/> <input type="button" value="🔍"/></p> <p><b>Cutoff Average From Range:</b> <input type="text" value="1.0000"/></p>	<p><b>*Evaluation Code:</b> <input type="text" value="ADMAVG"/> <input type="button" value="🔍"/></p> <p><b>*Cutoff Average To Range:</b> <input type="text" value="3.0000"/></p>
<p><b>*Program Action:</b> <input type="text" value="WAIT"/> <input type="button" value="🔍"/></p> <p><b>Cutoff Average From Range:</b> <input type="text" value="3.1000"/></p>	<p><b>*Evaluation Code:</b> <input type="text" value="ADMAVG"/> <input type="button" value="🔍"/></p> <p><b>*Cutoff Average To Range:</b> <input type="text" value="3.5000"/></p>

<i>Field or Control</i>	<i>Description</i>
<b>Program Action</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Evaluation Code</b>	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.
<b>Cutoff Average from Range</b>	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.
<b>Cutoff Average to Range</b>	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

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## 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	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Alternate Evaluations &gt; Alternate Offer Table</b>	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>
<b>Alternate Academic Program</b>	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.
<b>Alternate Evaluation Code</b>	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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assign Alternate Eval Codes (assign alternate evaluation codes)	RUNCTL_ADALTEVL	<b>Student Admissions</b> > <b>Processing Applications</b> > <b>Assign Alternate Eval Codes</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Institution</b>	Enter the academic institution to which the academic program belongs.
<b>Academic Program</b>	Enter the academic program. This is the original academic program to which the applicants applied but into which they were not admitted. The process assigns the alternate evaluation code to any applicant who applied to this academic program—in the admit term you specify—and has a program action of <i>Deny</i> , <i>Waitlist</i> , or <i>Waitlist Offer Accepted</i> .  If a student meets the above criteria but already has an application to the alternate program, the Alternate Averages process <i>does not</i> assign the alternate program code.
<b>Admit Term</b>	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	<b>Student Admissions &gt; Processing Applications &gt; Alternate Program Addition</b>	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**

<b>*Institution:</b>	<input type="text" value="PSUNV"/>		PeopleSoft University
<b>*Academic Career:</b>	<input type="text" value="UGRD"/>		Undergraduate
<b>Alternate Evaluation Code:</b>	<input type="text" value="ACT"/>		ACT Test
<b>*Rating Component:</b>	<input type="text" value="1OVER"/>		Overall Rating
<b>*Rating Value:</b>	<input type="text" value="27.0000"/>		
			<b>*Approved Academic Load:</b> <input type="text" value="Full-Time"/>
<b>*Academic Plan:</b>	<input type="text" value="ART"/>		<b>*Campus:</b> <input type="text" value="MAIN"/>
<b>*Program Action:</b>	<input type="text" value="ADMT"/>		<b>*Update Eval Status:</b> <input type="text" value="IP"/>
<b>Action Reason:</b>	<input type="text" value="AUTO"/>		Auto Assigned
<b>*Admit Term:</b>	<input type="text" value="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.

<i>Field or Control</i>	<i>Description</i>
<b>Institution</b>	Enter the academic institution for which you want to run the process.
<b>Academic Career</b>	Enter the academic career for the alternate academic program.
<b>Alternate Evaluation Code</b>	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.
<b>Rating Component</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Rating Value</b>	<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 <a href="#">Assigning Alternate Programs</a>.</p> <hr/> <p><b>Note:</b> 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/>
<b>Approved Academic Load</b>	Select the academic load that you want the process to assign to anyone who meets the criteria defined on this page.
<b>Academic Plan</b>	Enter the academic plan that you want the process to assign to anyone who meets the criteria defined on this page.
<b>Campus</b>	Enter the campus that you want the process assign to anyone who meets the criteria defined on this page.
<b>Program Action</b>	Enter the program action that you want the process assign to anyone who meets the criteria defined on this page.
<b>Update Eval Status</b> (update evaluation status)	Enter the evaluation status that you want the process to assign to anyone who meets the criteria defined on this page.
<b>Action Reason</b>	Enter the action reason that you want the process to assign to anyone who meets the criteria defined on this page.
<b>Admit Term</b>	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					
<b>Academic Institution:</b> PeopleSoft University		<b>Application Number:</b> 00024329							
<b>Academic Career:</b> Undergraduate		<b>Career Number:</b> 0							
<b>Program Data</b> Find   View All First 1 of 2 Last									
<b>Program Number:</b> 0		<b>Effective Date:</b> 08/24/2006							
<b>Admit Term:</b> 0540 2005 Spr		<b>Effective Sequence:</b> 1							
<b>Academic Program:</b> LAU Lib Arts		<b>Expected Graduation Term:</b>							
<b>Academic Load:</b> Full-Time		<b>Campus:</b> MAIN Main							
<input type="checkbox"/> Joint Program									
<b>Program Status</b>									
<b>Status:</b> Cancelled		<b>Action Date:</b> 08/24/2006							
<b>Program Action:</b> DENY Deny		<b>Action Reason:</b> AUTO Auto Assigned							
<a href="#">Evaluation</a>									
<b>Plan Data</b> Find   View All First 1 of 1 Last									
<b>Academic Plan:</b> ENGL-BA English (BA)		Major		BA					
<b>Sub-Plan Data</b> Find   View All First 1 of 1 Last									
<b>Sub-Plan:</b>									
<b>Transfer To:</b> Education									

- 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		
<b>Academic Career:</b> Undergraduate	<b>Application Nbr:</b> 00024329			
<b>Prog Nbr:</b> 1	<b>Academic Program:</b> Fine Arts Undergraduate			
Find   View All First 1 of 1 Last				
<b>Evaluation Code:</b> ACT	ACT Test			
<b>Evaluation Nbr:</b> 1	<input type="checkbox"/> Recalculate Evaluation			
<b>Evaluation</b>		<b>Rating</b>		
<b>Eval Stat:</b> Progress	<b>Committee Rating ID:</b> <input type="text"/>			
<b>Eval Dt:</b> 08/24/2006	<b>Overall Rating ID:</b> ACT			
<b>Comment:</b>	<div style="border: 1px solid gray; height: 40px;"></div>			
<b>Transfer To:</b> Application Evaluator Ratings	<input type="button" value="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		<b>Application Program Data</b>		Application Data	
Bill Harris				AD9200					
<b>Academic Institution:</b> PeopleSoft University		<b>Application Number:</b> 00024329							
<b>Academic Career:</b> Undergraduate		<b>Career Number:</b> 0							
<b>Program Data</b> <span style="float:right">Find   View All   First 1 of 1   Last</span>									
<b>Program Number:</b> 1		<b>Effective Date:</b> 08/24/2006							
<b>*Admit Term:</b> 0540 2005 Spr		<b>Effective Sequence:</b> 1							
<b>*Academic Program:</b> FAU Fine Arts		<b>Expected Graduation Term:</b>							
<b>*Academic Load:</b> Full-Time		<b>*Campus:</b> MAIN Main							
<input type="checkbox"/> Joint Program									
<b>Program Status</b>									
<b>Status:</b> Admitted		<b>Action Date:</b> 08/24/2006							
<b>*Program Action:</b> ADMT Admit		<b>Action Reason:</b> AUTO Auto Assigned							
<a href="#">Evaluation</a>									
<b>Plan Data</b> <span style="float:right">Find   View All   First 1 of 1   Last</span>									
<b>*Academic Plan:</b> UNDECL-UG Undeclared Undergraduate		Major							
<b>Sub-Plan Data</b> <span style="float:right">Find   View All   First 1 of 1   Last</span>									
<b>*Sub-Plan:</b>									
<b>Transfer To:</b> 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

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## Understanding Admissions Program Actions and Statuses

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**Important!** Mass Change is a deprecated product. 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:

<b><i>If you Select this Program Action:</i></b>	<b><i>The System Updates the Program Status to:</i></b>
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.

<b>Admissions Program Action</b>	<b>Explanation</b>	<b>Additional Steps or Requirements Caused by this Action</b>
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 canceled 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.

<b>Admissions Program Action</b>	<b>Explanation</b>	<b>Additional Steps or Requirements Caused by this Action</b>
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.

<b>Admissions Program Action</b>	<b>Explanation</b>	<b>Additional Steps or Requirements Caused by this Action</b>
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.

<b>Admissions Program Action</b>	<b>Explanation</b>	<b>Additional Steps or Requirements Caused by this Action</b>
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"> <li>• <b>Student Admissions &gt; Application Evaluation &gt; Application Decisions &gt; Action/Reason Entry</b></li> <li>• <b>Student Admissions &gt; Application Maintenance &gt; Action/Reason Entry</b></li> </ul>	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

<b>Academic Institution:</b>	<input type="text" value="PSUNV"/>	PeopleSoft University	
<b>Academic Career:</b>	<input type="text" value="UGRD"/>	Undergrad	<b>Program Action:</b> <input type="text" value="ADMT"/> Admit
<b>Academic Program:</b>	<input type="text" value="LAU"/>	Lib Arts	<b>Action Reason:</b> <input type="text"/>
<b>Admit Term:</b>	<input type="text" value="0550"/>	2005 Fall	<b>Action Date:</b> <input type="text" value="10/31/2004"/> <b>Seq:</b> <input type="text" value="1"/>

Apply to Program Application

<b>Application Nbr</b>	<b>ID</b>	<b>Name</b>	<b>Prog Nbr</b>
<input type="text" value="00022502"/>	<input type="text" value="SF0140"/>	Vickson, Sebastian	<input type="text" value="0"/> <span style="float: right; border: 1px solid gray; padding: 2px 5px;">Create Program</span>

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

Program Data	Program Status
<b>Effective Date:</b> 07/09/1998	<b>Sequence:</b> 0
<b>Institution:</b> PeopleSoft University	<b>Status:</b> Applicant
<b>Acad Prog:</b> Law	<b>Action Date:</b> 07/09/1998
<b>Admit Term:</b> 1998 Fall	<b>Prog Actn:</b> Applicatn
<b>Campus:</b> Walnut Creek Campus	<b>Action Rsn:</b>
<b>Acad Load:</b> Full-Time	

**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.

<i>Field or Control</i>	<i>Description</i>
<b>Admit Term</b>	Enter an admit term. Admit terms are defined on the Term Values Table page.
<b>Program Action</b>	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.
<b>Action Reason</b>	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.
<b>Action Date</b>	The default for the action date is your system date.
<b>Seq (sequence)</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Application Number and ID</b>	Enter the first application number to be processed. The ID displays. If you do not know the application number, prompt on the <b>ID</b> field.
<b>Program Number</b>	Enter the program number if the application has multiple program numbers. When you navigate out of this page or click the <b>Refresh</b> button, you can verify that you have the correct person and application by reviewing the information displayed in the <b>Program Data</b> and <b>Program Status</b> group boxes.
<b>Create Program</b>	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> .
<b>Calculate Deposits</b>	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.

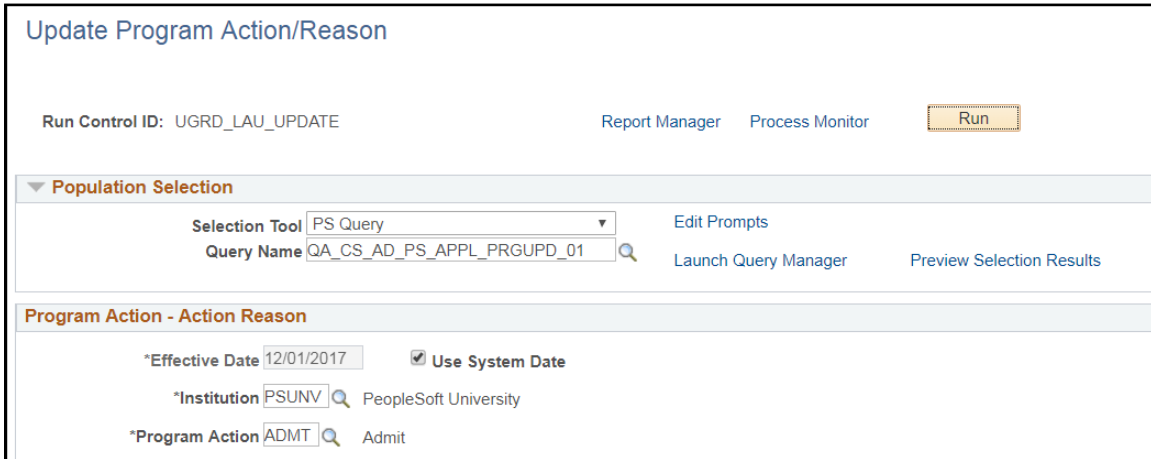
### Page Used to Run the Update Program Action/Reason Process

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Update Program Action/Reason	SAD_APL_PRG_RUN	<b>Student Admissions</b> > <b>Processing Applications</b> > <b>Update Applications</b> > <b>Update Program Action/Reason</b>	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)

<b>Field or Control</b>	<b>Description</b>
<b>Selection Tool</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	Enter a date equal to or greater than the System Date. The default value is the System Date.
<b>Use System Date</b>	Select this check box to always use the System Date and ignore the value in the <b>Effective Date</b> 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.

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## Updating Program Actions and Statuses Using Mass Change

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**Important!** Mass Change is a deprecated product. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see *PeopleTools: Application Engine*.

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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	<b>Student Admissions &gt; Processing Applications &gt; Update Applications &gt; Application Program Update</b>	Update the program data of the selected applications.  This process uses the applicants selected when running the mass change group to insert the program action and program reason defined on the Criteria and Defaults page of the Mass Change Definition component. You must first process your mass change group before running the application program update process.
Mass Change Definition	MC_DEFN_00	<b>Student Admissions &gt; Processing Applications &gt; Mass Change &gt; Mass Change Definition</b>	Define criteria for applications to be updated.
Mass Change Group	MC_DEFN_00	<b>Student Admissions &gt; Processing Applications &gt; Mass Change &gt; Mass Change Group</b>	Define the execution sequence for the mass change definitions.
Run Mass Change	MC_DEFN_00	<b>Student Admissions &gt; Processing Applications &gt; Mass Change &gt; Run Mass Change</b>	Run the mass change group to select the application to be updated via the application program update process.



# Managing Enrollment

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## 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:

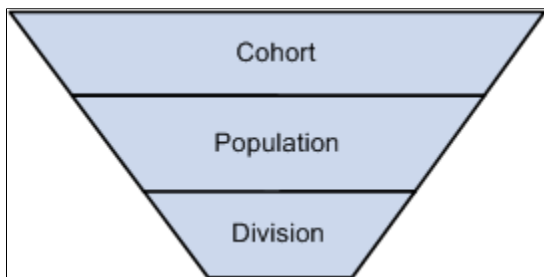
- Target enrollment numbers.
- Actual enrollment numbers.

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.

<b>Field</b>	<b>Detail Target</b>
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.

<b>Field</b>	<b>Detail Target 1</b>	<b>Detail Target 2</b>
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:

<b>Field</b>	<b>Detail Target 1</b>	<b>Detail Target 2</b>	<b>Detail Target 3</b>	<b>Detail Target 4</b>
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:

<b>Field</b>	<b>Detail Target 1</b>	<b>Detail Target 2</b>	<b>Detail Target 3</b>	<b>Detail Target 4</b>
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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Target Division Table	TARGET_DIV_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Enrollment Targets &gt; Enrollment Target Division &gt; Target Division Table</b>	Define a division.
Target Population Table	TARGET_POP_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Enrollment Targets &gt; Enrollment Target Population &gt; Target Population Table</b>	Define a population enrollment management target.
Enrollment Target Cohort	TARGET_COH_TABLE	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Enrollment Targets &gt; Enrollment Target Cohort</b>	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.

The screenshot shows the 'Enrollment Target Cohort' page. At the top, the 'Cohort' is set to 'F2002'. Below this, there are input fields for '\*Description:' (containing 'Fall 2002') and '\*Short Description:' (containing 'Fall 2002'). A table below these fields lists selected populations and divisions. The table has a header with 'Find | View All' and 'First 1 of 9 Last'. The table contains one row for '\*Population:' with 'ALL' selected, corresponding to 'All Programs'. Below this is another table for '\*Division' with a header 'Find | View All' and 'First 1-3 of 5 Last'. It lists three selected divisions: 'AFRAM' (African American), 'ALL' (All Programs), and 'FEMALE' (Female). Each row in the division table has '+' and '-' buttons for selection.

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.

<b>Field or Control</b>	<b>Description</b>
<b>Population</b>	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.
<b>Division</b>	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.

- Process enrollment management targets.
- Display enrollment management target results.
- Display target results with the Enrollment Management Summary page.

## Pages Used to Perform Enrollment Management

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Enrollment Target	ENRL_MGMT_TARGET	<b>Student Admissions</b> > <b>Enrollment Targets</b> > <b>Define Enrollment Targets</b> > <b>Enrollment Target</b>	Set enrollment targets for each level that you defined.
Target Detail	ENRL_MGMT_DETAIL	<b>Student Admissions</b> > <b>Enrollment Targets</b> > <b>Define Enrollment Targets</b> > <b>Target Detail</b>	Specify additional details about a target.
Target Applicants	ENROLL_MGMT_ID	<b>Student Admissions</b> > <b>Enrollment Targets</b> > <b>Define Enrollment Targets</b> > <b>Target Applicants</b>	<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	<b>Student Admissions</b> > <b>Enrollment Targets</b> > <b>Calculate Enrollment Targets</b>	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	<b>Student Admissions</b> > <b>Enrollment Targets</b> > <b>Enrollment Target Summary</b> > <b>Enrollment Target Summary</b>	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** \*Cohort:  Fall 2002

**Detail** \*Population:  LAU

**Select Prog**

**Current**

**All**

**Division:**  Female

**Comment:**

**Target / Real:**  /

**Result / Actual:**  /

**Result DateTime:**

**Group Detail Selection**
Find | View All | First 1 of 1 Last

**Detail Sequence:**

**Detail**
Find | View All | First 1 of 1 Last

\*Institution:  PSU

\*Term:  2002 Fall

\*Career:  Undergrad

## Group/Detail Information

<b>Field or Control</b>	<b>Description</b>
<b>Group</b>	Select this option to set up a group enrollment management target consisting of multiple detail targets.
<b>Detail</b>	Select this option to set up a detail enrollment management target. This is the default setting.
<b>Cohort</b>	Select the cohort for this enrollment management target.
<b>Population</b>	Enter the population for this enrollment management target.
<b>Division</b>	Enter the division for this enrollment management target.
<b>Target</b>	Enter the target number for this enrollment management target.
<b>Result</b>	After you run the Enrollment Target process, this field displays the total number of application rows meeting the target selection criteria.
<b>Actual</b>	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 <b>Actual</b> field contains the same number as the <b>Result</b> field.
<b>Real</b>	<p>After you run the Enrollment Target process, this field displays the same value as the <b>Result</b> 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 <b>Result</b> 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 <b>Real</b> 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>

<b>Field or Control</b>	<b>Description</b>
<b>Result Date/Time</b>	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:

<b>Field or Control</b>	<b>Description</b>
<b>Current</b>	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.
<b>All</b>	Select this option to have the Enrollment Target process check all the application rows. If a student has any application program row that matches the target selection criteria, he or she is included in the count.  For example, suppose that a person has applied to the LAU academic program as illustrated in the following table:

<b>Program</b>	<b>Effective Date</b>	<b>Status</b>
LAU	03/01/05	Admitted
LAU	01/01/05	Applied

<b>Field or Control</b>	<b>Description</b>
	<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 <b>All</b> option, the student is included in the enrollment target count on 3/01/05.</p> <p>If you select the <b>Current</b> 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>
<b>Detail Sequence</b>	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>
<b>Career</b>	Enter the academic career for this enrollment management target.
<b>Term</b>	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 Applicant + -

**Academic Program Criteria** Find | View All First 1 of 1 Last

\*Acad Prog: LAU Liberal Arts Undergraduate + -

**Gender Criteria** Find | View All First 1 of 1 Last

\*Gender: Female Female + -

**Ethnic Group Criteria** Find | View All First 1 of 1 Last

\*Ethnic Group  + -

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.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Admit Type</b>	Select this check box if you want to define your target by admit type. After you select this check box, the <b>Admit Type</b> field becomes available for input.
<b>Program Status</b>	Select this check box if you want to define your target by program status. After you select this check box, the <b>Status</b> field becomes available for input.



<i>Field or Control</i>	<i>Description</i>
<b>Academic Program</b>	Select this check box if you want to define your target by academic program. After you select this check box, the <b>Acad Prog</b> (academic program) field becomes available for input.
<b>Gender</b>	Select this check box if you want to define your target by gender. After you select this check box, the <b>Gender</b> field becomes available for input.
<b>Ethnic Group</b>	Select this check box if you want to define your target by ethnic group. After you select this check box, the <b>Ethnic Group</b> 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.

<i>Field or Control</i>	<i>Description</i>
<b>Cohort</b>	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

**Division:**

**Population:**

**Group / Detail:**

	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>
<b>Cohort, Population, and Division</b>	Select the cohort, population, and division for which you want to display targets.
<b>Search</b>	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>
<b>Seq Nbr</b> (sequence number)	The target sequence number.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Cohort</b>	The defined cohort.
<b>Population</b>	The defined population.
<b>Division</b>	The defined division.
<b>Target</b>	The target number you originally set for this enrollment management target.
<b>Result</b>	The current result count for this target.
<b>Real</b>	The current real count for this target.
<b>Result Calculated Date/Time</b>	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	<b>Student Admissions</b> > <b>Enrollment Targets</b> > <b>Target Detail Template</b> > <b>New Target Detail</b>	Create new enrollment management targets using the target template feature.
Copy Target Detail	TARGET_DETAIL_COPY	<b>Student Admissions</b> > <b>Enrollment Targets</b> > <b>Target Detail Template</b> > <b>Copy Target Detail</b>	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**

<b>Detail Sequence:</b>	<input style="width: 90%;" type="text" value="000160"/>	<input style="background-color: #ffff00; border: 1px solid black; padding: 2px 5px;" type="button" value="Copy"/>
<b>Cohort:</b>	1999 Academic Year	
<b>Population:</b>	Civil Engineering	
<b>Division:</b>	Latino	

**Copy to Detail** Find | View All    First ◀ 1 of 1 ▶ Last

<b>Academic Institution:</b>	
<b>Academic Career:</b>	
<b>*Term:</b>	<input style="width: 90%;" type="text" value="0410"/>

<i>Field or Control</i>	<i>Description</i>
<b>Detail Sequence</b>	Select the detail sequence number of the detail from which you are copying. The system displays the corresponding cohort, population, and division, if applicable.
<b>Term</b>	Select the term for the new detail you are creating.

<i>Field or Control</i>	<i>Description</i>
<b>Copy</b>	Click to copy the detail template from the old to the new target.

After you save the page, you can display the new detail template and change only the items you have to for the new target, rather than recreating everything from scratch.

---

## Generating Enrollment Management Reports

This section discusses how to generate three different enrollment management reports:

- Enrollment Target Cohort Table.
- Target Population Table.
- Target Division Table.

## Pages Used to Generate Enrollment Management Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Target Cohort	PRCSRUNCTL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Reports &gt; Enrollment Target &gt; Enrollment Target Cohort</b>	Create a report listing the enrollment target cohort levels you have defined.
Enrollment Target Population	PRCSRUNCTL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Reports &gt; Enrollment Target &gt; Enrollment Target Population</b>	Create a report listing the enrollment target population levels you have defined.
Enrollment Target Division	PRCSRUNCTL	<b>Set Up SACR &gt; Product Related &gt; Recruiting and Admissions &gt; Reports &gt; Enrollment Target &gt; Enrollment Target Division</b>	Create a report listing the enrollment target division levels you have defined.



# Loading and Assigning EPS Market Codes

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## 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.

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## 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	<b>Campus Community &gt; Organization &gt; Define Organization Data &gt; Ext Org Code Type Table &gt; External Organization Code Type</b>	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>
<b>Code Type Option</b>	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	<b>Campus Community</b> > <b>Organization</b> > <b>Organizations Data Load</b> > <b>EPS Load External Data</b>	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
  
 Input File:

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>
<b>Load EPS Data</b>	Select to <i>add</i> EPS data to your system. You must select either the <b>Load EPS Data</b> check box or the <b>Delete EPS Data</b> check box.
<b>EPS Code Type</b>	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.
<b>Input File</b>	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>
<b>Delete EPS Data</b>	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.
<b>All</b>	Select to remove all EPS data.
<b>Specific Type and EPS Code Type</b>	Select <b>Specific Type</b> to delete a specific EPS data type. Then choose an <b>EPS Code Type</b> .

Click the **Run** button to run the EPS External Load process at user-defined intervals. The process name is CCEPSLOD and the process type is SQR Report.

---

## Viewing EPS Load Results

This section discusses how to view the following data related to the EPS load process:

- Zip codes
- Market codes
- Error messages
- Suspense messages
- All messages

## Pages Used to View EPS Load Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EPS Zip to Market Code	EPS_ZIP_MRKT_TABLE	<b>Campus Community &gt; Organization &gt; Define Organization Data &gt; EPS Zip to Market Code</b>	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	<b>Campus Community &gt; Organization &gt; Define Organization Data &gt; EPS Market Code Table</b>	View or update the EPS market codes that you loaded through the load process.
EPS Suspense Data	EPS_SUSP_DATA	<b>Campus Community &gt; Organization &gt; Organization Data Load &gt; EPS Suspense &gt; EPS Suspense Data</b>	View any error messages that may result from the EPS load process.
EPS Suspense Message	EPS_SUSP_MESSAGE	<b>Campus Community &gt; Organization &gt; Organization Data Load &gt; EPS Suspense &gt; EPS Suspense Message</b>	View the EPS suspense error messages.
EPS Messages	EPS_MESSAGE_TABLE	<b>Campus Community &gt; Organization &gt; Organization Data Load &gt; EPS Messages</b>	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

<b>*Ext Org Code Type:</b>	<input type="text" value="QA1"/>		<span style="border: 1px solid #ccc; padding: 2px;">QA1</span>
<b>*Postal:</b>	<input type="text" value="01000"/>		
<b>*Market Name:</b>	<input type="text" value="0AL-"/>		
<b>*Market Code:</b>	<input type="text" value="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	
<b>Ext Org Code Type:</b>	NATIONAL	<input type="checkbox"/> Delete	
<b>Record Nbr:</b>	1		
<b>Postal Place Indicator:</b>	Add		
<b>Postal:</b>	01000		
<b>Market Name:</b>	0AL-		
<b>Market Code:</b>	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.

<i>Field or Control</i>	<i>Description</i>
<b>Completed</b>	The load process selects this option when the record has been successfully updated.
<b>Error</b>	The load process selects this option when it encounters an error, such as a duplicate. The system indicates duplicates by selecting the <b>Duplicate Ind</b> 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 <b>Duplicate Ind</b> 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

<b>Ext Org Code Type:</b>	NATIONAL	<b>Postal Place Indicator:</b>	Add
<b>Postal:</b>	01000	<b>Record Nbr:</b>	1

**Message Details**
Find | View All
First  1 of 1  Last

<b>Run Date/Time:</b>	09/20/2004 1:56:50PM	<b>Process Instance:</b>	276 <input type="button" value="+"/> <input type="button" value="-"/>
<b>User ID:</b>	PS	<b>Process Name:</b>	CCEPSLOD
<b>Message Set Number:</b>	14200	<b>Message Number:</b>	226
<b>Message Severity:</b>	Error		
<b>Message Text:</b>	Duplicate postal codes encountered in EPS input data.		
<b>Description:</b>	Duplicate data can result in incorrect data in the EPS Zip to Market Data table. Review the result and correct as necessary.		
<b>Comments:</b>	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:**

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:** \_\_\_\_\_

<i>Field or Control</i>	<i>Description</i>
<b>Code Type, Postal, Process Instance, Postal Place, and Record Nbr</b> (record number)	Use these fields to narrow the selection of messages that you want to display.
<b>Search</b>	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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EPS Assign Organization	EPS_ASGN_ORG_PARMS	<b>Campus Community &gt;                      Organization &gt;                      Organization Data Load &gt;                      EPS Assign Organization</b>	Assign EPS market codes to external organizations.

Page Name	Definition Name	Navigation	Usage
External Organization Codes	EXT_ORG_CODES	<b>Campus Community &gt; Create/Maintain Organizations &gt; External Organization Codes &gt; External Organization Codes</b>	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:

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

Field or Control	Description
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>
<b>Assign EPS Data Type and EPS Code Type</b>	Select to assign EPS data to organizations. Select the EPS code type to assign.
<b>Skip</b>	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.
<b>Replace</b>	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>
<b>Assign EPS Code to All Org</b> (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 <b>School Type</b> field and the fields in the <b>Address Selection</b> group box become unavailable for input.
<b>School Type</b>	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 <b>Assign EPS Code to All Org</b> 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>
<b>Country and State</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Begins With</b>	Select to choose an organization by a beginning postal code. Enter the beginning postal code in the <b>From</b> field.  For example, suppose that one organization has had a 5-digit postal code entered (90068) and one organization has a 9-digit version of the postal code entered (90068-6328). Using a postal code that begins with 90068 will find both organizations.
<b>Equals</b>	Select to choose an organization by a specific postal code. Enter the postal code in the <b>From</b> field.
<b>Range</b>	Select to choose an organization by a postal code range. Enter the beginning postal code in the <b>From</b> field and the ending postal code in the <b>To</b> field.
<b>N/A</b>	Select if you do not want to use postal codes in your selection criteria for the organization. This is the default setting.

Click the **Run** button to run the EPS Assign Organization process at user-defined intervals.

## Viewing and Maintaining the Organization External Codes

Access the External Organization Codes page (**Campus Community > Create/Maintain Organizations > External Organization Codes > External Organization Codes**).

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>
<b>Ext Org Code Type</b> (external organization code type)	Enter the external organization code type. If this external organization code type is an EPS code type, then the <b>EPS Postal Code</b> field becomes available for selection (if the external organization code type is not an EPS code type, then the <b>EPS Postal Code</b> field displays but you cannot edit or change this field).
<b>EPS Postal Code</b>	Enter the EPS postal code. You can change this field no matter what the assignment process did.
<b>EPS Market Code</b> and <b>EPS Market Name</b>	After you enter an EPS postal code, the system displays the <b>EPS Market Code</b> and <b>EPS Market Name</b> 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	<b>Campus Community</b> > <b>Organization</b> > <b>EPS Purge Suspense File</b>	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.

<i>Field or Control</i>	<i>Description</i>
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 <b>Purge Code Type</b> 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.

<i>Field or Control</i>	<i>Description</i>
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> .

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Completed</b>	Select to remove all suspense records with a status of <i>Completed</i> .
<b>Error</b>	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

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## 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.

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**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.

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### 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><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Delete Communications, Delete Checklists, and Delete Comments</b>	Select the appropriate check boxes to delete any associated 3Cs that are assigned to prospect or application records.  Only 3Cs with the administrative functions PSSV, PROS, or PROP for prospect records and ADMA or ADMP for applications, where the variable data matches the prospect or application record, will be deleted.

## By Population

The **By Population** group box appears when the Population Selection process is selected. The population selection process is a method for selecting the IDs to process for a specific transaction. The **By Population** group box functions in the same way as the **Population Selection** group box, which is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction.

Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process, and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.


If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See “Understanding the Population Selection Group Box” (Campus Community Fundamentals).

<i>Field or Control</i>	<i>Description</i>
<b>Selection Tool</b>	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.
<b>Query Name</b>	<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 <b>Preview Selection Results</b> link to verify that the records that you selected are the ones that you want to delete. Click the <b>Run</b> 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	<b>Student Recruiting &gt; Delete Prospects &gt; Delete Prospect Record</b>	Select individual prospect records for deletion.
Prospect Delete by Batch	SAD_PRS_DEL_BATCH	<b>Student Recruiting &gt; Delete Prospects &gt; Prospect Delete by Batch</b>	Select a group of prospect records for deletion.
Prospect Delete Holding	ADM_PRS_DEL_SUSP	<b>Student Recruiting &gt; Delete Prospects &gt; Prospect Delete Holding</b>	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	<b>Student Recruiting &gt; Delete Prospects &gt; Prospect Delete Process</b>	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								
Customize   Find   View All   First 1-3 of 3 Last								
Prospect Prospect Details								
ID	Name	*Academic Institution	*Academic Career	Delete Communications	Delete Checklists	Delete Comments		
1	AD5220	Martha Wright	PSU	Undergrad	<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						
Customize   Find   View All   First 1-3 of 3 Last						
Prospect Prospect Details						
	Recruiting Center	Admit Term	Admit Type	Application On File	Admission Data Creation Date	
1	Undergraduate	0450	FYR	<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.

### 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.

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

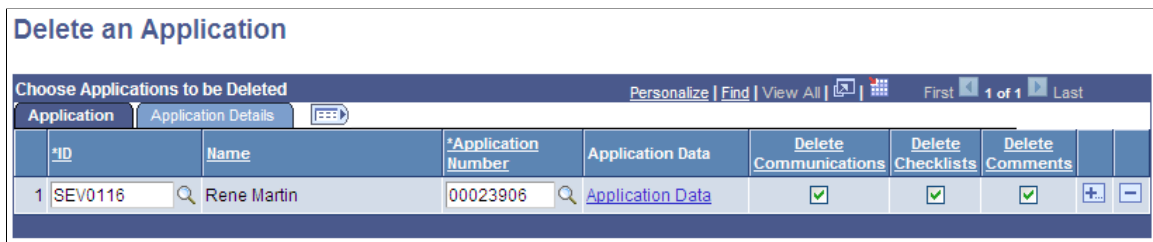
<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Delete an Application	SAD_APP_DELETE	<b>Student Admissions &gt; Application Delete &gt; Delete an Application</b>	Select individual applications for deletion.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Application Delete by Batch	SAD_APP_DEL_BATCH	<b>Student Admissions</b> > <b>Application Delete</b> > <b>Application Delete by Batch</b>	Select a group of applications for deletion.
Application Delete Holding	ADM_APP_DEL_SUSP	<b>Student Admissions</b> > <b>Application Delete</b> > <b>Application Delete Holding</b>	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	<b>Student Admissions</b> > <b>Application Delete</b> > <b>Application Delete Process</b>	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.



<b>Field or Control</b>	<b>Description</b>
<b>ID</b>	Enter the ID of the person for whom you want to delete an application.
<b>Application Number</b>	After you enter the ID, select the application that you want to delete.
<b>Application Data</b>	Click this link to access the Maintain Applications component in a new window.
<b>Delete Communications Delete Checklists and Delete Comments</b>	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.

Delete an Application					
Choose Applications to be Deleted					
Application	Application Details				
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.

### Application Delete by Batch

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

**By Population**

Population Selection

Selection Tool: PS Query

Query Name: QA\_CS\_AD\_PS\_APPDEL\_01 [Launch Query Manager](#) [Preview Selection Results](#)

**3C ADMA/ADMP Delete Options**

- Communications
- Checklists
- Comments

### 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

<b>Application Number:</b>	00024171	<a href="#">Application Data</a>
<b>EmplID:</b>	SEV0605	
<b>Name:</b>	Mildred Pierce	
<b>Academic Institution:</b>	PeopleSoft University	
<b>Academic Career:</b>	Undergraduate	
<b>Application Center:</b>	Undergraduate	
<b>Admit Type:</b>	First-Year	
	<input checked="" type="checkbox"/> <b>Delete Communications</b>	
	<input checked="" type="checkbox"/> <b>Delete Checklists</b>	
	<input checked="" type="checkbox"/> <b>Delete Comments</b>	

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

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## 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	<b>Student Admissions &gt; Reports &gt; Admissions Funnel Report &gt; Parameters</b>	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:  PeopleSoft University  **Create Compare Report**

\*Report Grouping:   **Show Term Detail**

Address Type for Country/State:  Home

All Terms for Academic Year:

**Admit Term** [Find](#) | [View All](#) First 1-2 of 11 Last

<input type="text" value="0470"/>	2002 FIC1	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="0475"/>	2002 Fall	<input type="button" value="+"/> <input type="button" value="-"/>

Define the data that you want to appear in your report in the Report Request Parameters section.

<b>Field or Control</b>	<b>Description</b>
<b>Report Grouping</b>	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> .
<b>Create Compare Report</b>	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.
<b>Regulatory Region</b>	Select the <b>Regulatory Region</b> 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.
<b>Show Term Detail</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Address Type for Country/State</b>	This field appears when you select <i>Also By Country/State</i> in the <b>Report Grouping</b> field. Select the address type that you want the system to use when grouping the report data.
<b>All Terms for Academic Year</b>	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.
<b>All Terms in Comparison Year</b>	If you are running a comparison report, select the year to which you are comparing.
<b>Admit Term</b>	The system populates the admit terms based on the year you selected in the <b>All Terms for Academic Year</b> . 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.
<b>Comparison Admit Term</b>	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*

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
ADAVGCUT Average Cutoff Report	Enables you to assess an evaluated applicant pool to determine the admissions averages that drive certain program actions. (SQR)	<b>Student Admissions &gt; Reports &gt; Average Cutoff Report</b>	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).	<b>Student Admissions &gt; Reports &gt; Admissions Funnel Report</b>	RUNCTL_ADFUNNEL

## Recruiting and Admissions Reports: Selected Reports

This section provides detailed information about individual reports including important fields and tables accessed.

### ADAVGCUT

<b>Field or Control</b>	<b>Description</b>
<b>Institution</b>	Enter the institution name.
<b>Academic Program</b>	Enter the academic program for which you want to generate an average cutoff report.

<b>Field or Control</b>	<b>Description</b>
<b>Admit Term</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Report Grouping</b>	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> .
<b>Create Compare Report</b>	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.
<b>Show Term Detail</b>	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 <b>Report Grouping</b> field. Select the address type that you want the system to use when grouping the report data.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>All Terms for Academic Year</b>	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.
<b>All Terms in Comparison Year</b>	If you are running a comparison report, select the year to which you are comparing.
<b>Admit Term</b>	The system populates the admit terms based on the year you selected in the <b>All Terms for Academic Year</b> . 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.
<b>Comparison Admit Term</b>	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.

