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PeopleSoft Campus Solutions 9.2: Campus Solutions Application Fundamentals

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

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

Locally Installed 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.

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

Typographical Convention	*Description*
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

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

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

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

Region and Industry Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

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

Using and Managing the PeopleSoft Online Help

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

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft CS Related Links

Hosted Online Help Home

PeopleSoft Information Portal

My Oracle Support

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

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

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	Follow @PeopleSoft_Info on X.
	Read PeopleSoft Blogs
	Connect with PeopleSoft on LinkedIn

Chapter 1

Getting Started with Campus Solutions

Campus Solutions Overview

This section provides an overview of the Campus Solutions applications. Specifically, it provides overviews of:

- PeopleSoft Campus Community.
- PeopleSoft Recruiting and Admissions.
- PeopleSoft Student Records.
- PeopleSoft Academic Advisement.
- PeopleSoft Financial Aid.
- PeopleSoft Student Financials.
- PeopleSoft Contributor Relations.
- PeopleSoft Campus Self Service.

PeopleSoft Campus Community

Campus Community enables you to maintain and manage a wide range of basic information about people and organizations of interest to the institution. Each application within Campus Solutions relies on this data which includes an individual's or organization's name, address, and system ID.

Campus Community provides the following functionality:

- *Personal Information Management*– This functionality enables you to create and maintain personal data to identify the individuals who comprise the campus community, including names and addresses.

  You can also track personal attributes such as languages, ethnicity, and religious preferences, and health , identification, and participation information. You also set FERPA control and manage system IDs here.

- *Organization Data Management*– This functionality enables you to maintain data about the schools and other organizations important to the institution, including addresses, contact names, and phone numbers.

- *(USA) SEVIS (Student and Exchange Visitor Information System) Visa Processing* – This functionality enables you to create and maintain foreign visas data about student (F/M) and exchange visitor (J-1) visas and relevant dependent data.

  This functionality includes the ability to submit required information to the US Department of Homeland Security (DHS) and incorporate updated information received from DHS.

- *The 3Cs*– This functionality (communications, checklists, and comments) enables you to create, track, and assign interactions with prospects, applicants, students, alumni, donors, and external organizations.

  The 3Cs are shared across all of Campus Solutions; this is important to consider when designing a 3C setup.

  - *Communication Management*– Enables you to manage the institution's incoming and outgoing contacts with students, prospects, recruits, staff, alumni, donors, and organizations.
  - *Checklist Management*– Enables you to create lists to track activities and dues dates, and identify their status at any time.
  - *Comment Management*– Enables you to enter notes in the database about individuals, organizations, or events.

PeopleSoft Recruiting and Admissions

Recruiting and Admissions administers the institution's admission process by managing recruiters and tracking prospects and applicants. Admissions offices have the ability to empower prospective students through the self-service applications offered with Recruiting and Admissions includes automated processes such as application evaluations, external test score loading, recruitment category assignment, application loading from test score data, and academic transcript loading using the PeopleSoft EDI Manager tool.

The system's integration with Campus Community, Student Records, Student Financials, Financial Aid, and Academic Advisement reduces repetitive entry and enhance ease of communication across the institution's various departments. For example, when an applicant matriculates, her record automatically appears in Student Records.

Recruiting and Admissions includes this functionality:

Comprehensive Recruiting Capabilities

After you create a record for a prospective student, you can store extensive recruiting and education information. Communication, checklist, and comment tools help you tailor contact to meet their individual needs.

- Capture information about prospective students by means of the new request for information form or through data uploaded from search and testing databases.
- Maintain information about recruiters, including their role, the types of students they work with, the regions they serve, and their special interest areas.
- Assign regions, categories, and recruiters to a group of prospects based on a variety of selection criteria. For example, bio/demographic data, address data such as state and postal code, recruiting status, and recruiting center.
- Organize prospective students and applicants by geographic region, interests, extracurricular activities, their level of interest, and more.
- Plan and coordinate recruitment events for different programs targeting specific student populations.
- Develop tailored communication plans based on prospect's or applicant's individual characteristics.

- Load and assign EPS™ (Enrollment Planning Service) market codes to external organizations to help focus recruiting activities.
- Collect and analyze data about recruiting activities such as college fairs, open houses, recruiting trips, interviews, mailings, and publications.

Flexible Application Processing

Tailor the recruiting and admissions system according to the institution's unique requirements and practices. Recruiting and Admissions handles both manual and background processing.

- Maintain multiple applications for an individual applicant.
- Tailor admission requirements and processing for each academic program.
- Enable applicants to track application status history through the web.
- Create admission rating schemes and criteria for automated evaluations.
- Load transcripts, tests, and applications from external agencies and central application services.
- Enable an applicant to accept or decline their admission as well as pay their deposit fee online.
- Update applicant status automatically based on a program's individually defined criteria.
- Automate evaluations and updates of admission decisions.
- Set up expert data entry to ease data entry.
- Admit students without going through the formal admissions process with Quick Enroll/Admit.
- Quickly delete a prospect or applicant record entered in error.

Recruiting and Admissions includes a variety of summary information pages that provide easy access to data, enabling institutions to make informed day-to-day admissions decisions.

Enrollment Management Features

Set enrollment management targets for specific groups you define by academic institution, career, and term. You can further specify targets by admit type, program status, academic program, gender, and ethnic group. Recruiting and Admissions automatically calculates current enrollment target results.

- Design a three-level hierarchical structure of enrollment targets with the ability to group and link the levels however you want.
- Display enrollment target results at any time to track progress toward institutional recruiting efforts.
- View a list of people who meet the target selection criteria.
- Create new targets by using the template feature to copy the details you want from existing targets.
- Generate enrollment management reports listing the target and actual levels the institution has defined.
- Measure the success of admissions decisions. For example, you can look at how many enrolled students eventually graduate.

PeopleSoft Student Records

Student Records enables you to enter, track, and process all of the academic information. PeopleSoft minimizes repetitive data entry while enabling you to gain maximum control over the records—from the course catalog and schedule of classes to student programs, plans, and subplans.

After applicants are admitted and matriculate, Student Records moves forward to activate, enroll, grade, evaluate, and graduate students. In conjunction with the Academic Advisement processes, the Student Records application tracks students through graduation.

The major features within Student Records are:

- Course catalog.
- Schedule of classes.
- Repeat checking.
- Instructor workload.
- Enrollment.
- Transfer credit processing.
- Attendance tracking.
- Student grading.
- Student data tracking.
- Transcripts.
- Academic statistics.
- Enrollment verifications.
- Graduation processing.
- LMS (Learning Management Systems) integration.

PeopleSoft Academic Advisement

Academic Advisement is the application within Campus Solutions that is used to track the requirements and policies that a student must satisfy to graduate. As a student progresses toward graduation, Academic Advisement analyzes those courses completed by the student—both successfully and unsuccessfully—and ascertains what requirements are still outstanding.

Using data from Student Records and requirements entered in Academic Advisement, this application automatically tracks a student's degree progress. After you enter requirements into the system, you can analyze a student's data against the requirements to report degree progress. You can also perform what-if scenarios for student to see what courses they might need to complete for a particular major.

With this application, you can:

- Set up and view academic course lists, requirements, and requirement groups.
- Share courses.

- Modify existing requirements and make exceptions for a specific student.
- Generate advisement reports.

PeopleSoft Financial Aid

Financial Aid provides a powerful and flexible tool to manage the operations of an institution's financial aid office. The system starts with Federal and Institutional Aid applications and leads you through automated need calculations, budgets, awards, disbursements, loan processing, and tracking data. Support of Department of Education regulations are incorporated into Financial Aid on a regular basis so that the institution remains in compliance with Department of Education regulations and has access to new federal aid initiatives. Financial Aid helps you process and track loan applications under the federal Direct Lending and Federal Family Educational Loan Program (FFELP), along with state, university, and alternative loan programs more efficiently and effectively.

With this application, you can:

- Establish the general processing for your financial aid office, including award cycles and terms, aid eligibility and packaging, budgets, and application processing options.
- Process multiple types of aid applications and assess student eligibility.
- Award, package, and disburse aid to students.
- Set up and administer CommonLine, Common Record CommonLine, and Direct loan programs.
- Manage Pell payments and Title IV funds.
- Manage students' work study.
- (CAN) Set up and process Canadian financial aid applications.
- Manage the Fiscal Operation Report and Application to Participate (FISAP).

PeopleSoft Student Financials

Student Financials is a tool for higher education institutions to manage student receivables, billing, collections, and cashiering. Using Student Financials, both staff and students can quickly find and use the financial information they need to make critical decisions.

Student Financials receives information from virtually all areas of Campus Solutions. With this application, you can:

- Calculate fees and tuition.
- Maintain customer account information.
- Create bills.
- Establish payment plans.
- Refund tuition and fees.
- Perform cashiering.
- Process collections.

- Interface with a general ledger system.
- Set up and print tax forms.

PeopleSoft Contributor Relations

Contributor Relations is a comprehensive solution that helps contributor relations professionals to optimize strategic planning and decision making. The application integrates with other PeopleSoft applications within Campus Solutions, Financials, and Human Resources to create an enterprise-wide organizational solution.

Using Contributor Relations, you can implement strategic plans for the handling of constituents, and manage complex campaign efforts, multifaceted events, volunteer efforts, and membership drives using the initiative management feature. Contributor Relations includes a comprehensive gift processing feature that handles the entry of gift, pledge, and membership transactions. This component includes functionality for handling matching gifts, tribute and memorial gifts, acknowledgements, and giving club membership.

Contributor Relations supports all major components of a philanthropic or nonprofit organization in one application. Contributor Relations' eight component functions are completely integrated, enabling efficient workflow, effective data tracking and retrieval, sophisticated reporting features, and cohesive common processes throughout the enterprise.

The eight component functions within Contributor Relations are:

- Constituent Information
- Gift and Pledge
- Prospect Manager
- Event Manager
- Campaign Manager
- Volunteer Manager
- Membership Manager
- Planned Giving

PeopleSoft Campus Self Service

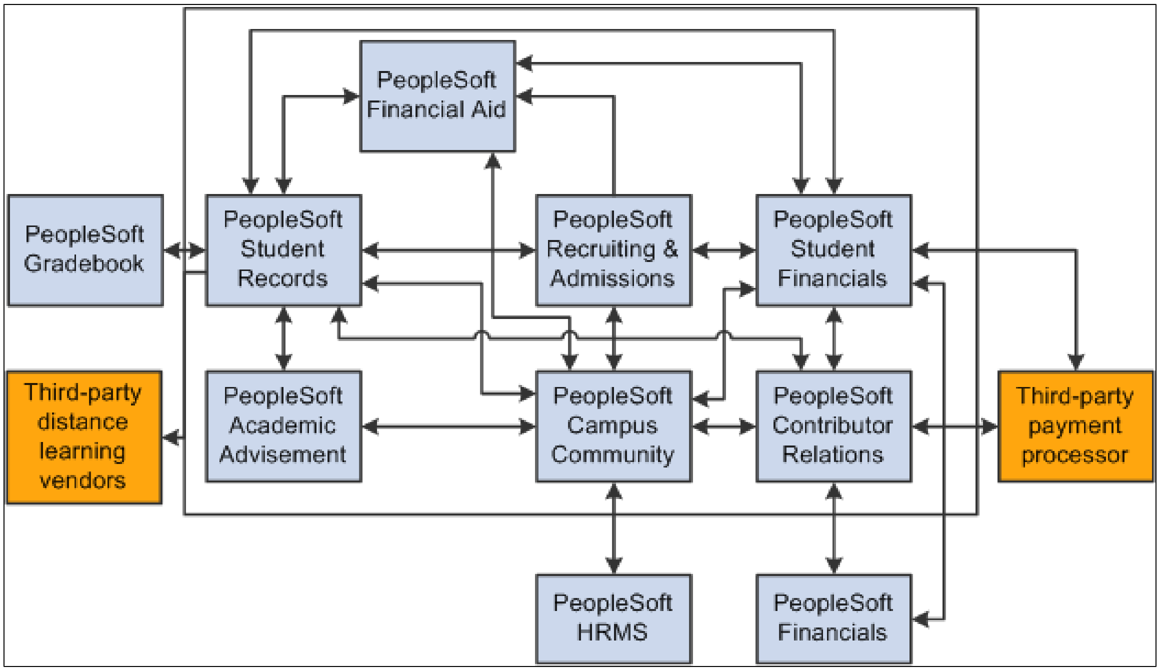
Campus Solutions offers Campus Self Service as a separately licensed product. If you have licensed Campus Self Service, you can use the self-service pages described in *PeopleSoft Campus Self Service 9.0* product documentation.

Self-service applications bring multiple transactions together into a single unit. You can use self-service pages to provide system access to students, applicants, alumni, faculty, visitors, and other users and allow them to perform a variety of self-service transactions.

Campus Solutions Integrations

The following process flow illustrates the high-level Campus Solutions business processes:

Campus Solutions products interact with each other, both specifically and generally, as well as with some third-party entities.



Implementation Prerequisites and Dependencies

Important! Financial Aid Notification (FAN) letter 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)

This section provides an overview of the dependencies within Campus Solutions and discusses implementation considerations for:

- Campus Community and institutional structure.
- Student Records.
- Recruiting and Admissions.
- Academic Advisement.
- Financial Aid.
- Student Financials.
- Contributor Relations.
- Gradebook.

Each product's documentation topics discuss the product's business processes, integrations, and implementation considerations in greater detail.

Understanding Dependencies Within Campus Solutions

Before you use Campus Solutions, load the tables in the proper order. When populating tables in Campus Solutions, it is important that you load data in a prescribed sequence. This sequential order takes into account each table's data dependencies and hierarchical layers. For example, institutional structure must be defined first because all of the applications in Campus Solutions are dependent on the basic structure you set up for the institution.

Before you implement Campus Solutions, decide the order in which to implement each application. For example, you may need to "go live" with Financial Aid before completing the implementation of Student Financials. By reviewing the information for Financial Aid, you see that you must set up Item Types in Student Financials before you can set up Financial Aid Item Types. With this knowledge, Financial Aid and Bursar's staff can work together to make the necessary accommodations to the system.

Warning! Because of dependencies between applications, it is important that you take the information that follows into consideration prior to beginning the application setup process.

Preparing for Campus Community and Institutional Structure

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations. See:
Integrating Person Data
Integrating Setup Data
Monitoring Integrations Using the Integrity Utility
See *Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions* in My Oracle Support (ID 2091799.2).

Preparing for Student Records

Detailed information for these setup tasks can be found in *PeopleSoft Student Records 9.2.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Student Records system.
- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the Student Records needs of these features are in place.
- Coordinate the setup of General Ledger options and Fees with Student Financials and Financials.
- Coordinate the setup of transcripts with Academic Advisement.

For Instructor and Advisor Personal Data setup: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations. See:

Integrating Person Data

Integrating Setup Data

Monitoring Integrations Using the Integrity Utility

See *Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions* in My Oracle Support (ID 2091799.2).

Preparing for Recruiting and Admissions

Detailed information for these setup tasks can be found in *PeopleSoft Recruiting and Admissions 9.2.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence and selected parts of the Student Records setup sequence must be completed prior to setting up the Recruiting and Admissions system.
- Coordinate the setup of School Subject and External Courses for transcript credit purposes with Student Records.
- Coordinate the setup of Application and Deposit Fees with Student Financials.
- Coordinate the setup of Early Financial Aid Offers and Prospect Cross Reference with Financial Aid.

Preparing for Academic Advisement

Detailed information for these setup tasks can be found in *PeopleSoft Academic Advisement 9.2.*

Preliminary setup tasks:

- Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Academic Advisement system.
- Student Records must be set up before beginning the set up of Academic Advisement.

  In particular, a transcript type for Academic Advisement must be created so you can run advisement reports.
- An active student must be set up in Campus Community and Recruiting and Admissions before you can run an academic advisement report or set up student exceptions.
- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the Academic Advisement needs of these features are in place.

Preparing for Financial Aid

Detailed information for these setup tasks can be found in *PeopleSoft Financial Aid 9.2.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community, Recruiting and Admissions, and Student Records setup sequences must be completed prior to setting up the Financial Aid system.
- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the FAN letter and other financial aid needs of these features are in place.
- Coordinate the setup of Early Financial Aid Offers and Prospect Cross Reference with Recruiting and Admissions.
- Coordinate the setup of item types and keywords with Student Financials.

Establish the Item Group FA-BUDGET with Student Financials and set up the Financial Aid Origin to be used for disbursing aid.

Preparing for Student Financials

Detailed information for these setup tasks can be found in *PeopleSoft Student Financials 9.2*.

Preliminary setup tasks:

- The Institutional Structure/Campus Community, Recruiting and Admissions, and Student Records setup sequences must be completed prior to setting up the Student Financials system.
- Coordinate the setup of General Ledger options with the Financials system counterparts to ensure you are using valid account and ChartField combinations.
- If you run Student Financials refunding through PeopleSoft Payroll or PeopleSoft Accounts Payable, coordinate refunding options with the Financials system counterparts.
- Review 3Cs—Communications, Checklists, and Comments—and service indicator setup to make sure the Student Financials needs of these features are in place.
- Coordinate the setup of item types and keywords with Financial Aid and Contributor Relations.
- Coordinate the setup of application and deposit fees with Recruiting and Admissions.

Preparing for Contributor Relations

Detailed information for these setup tasks can be found in *PeopleSoft Contributor Relations 9.2*.

Preliminary setup tasks:

- Complete the Institutional Structure/Campus Community setup sequence, including departments, before setting up the Contributor Relations system.
- Coordinate the setup of item types with Student Financials.

  This setup is required prior to completing Contributor Relations gift or membership setup.

Preparing for Gradebook

Detailed information for these setup tasks can be found in *PeopleSoft Gradebook 9.2*.

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Gradebook system.
- Student Records must be set up before beginning the setup of Gradebook.

  In particular, the course catalog must be populated. Additionally, classes must be scheduled and students must be enrolled to use the Gradebook.

Campus Solutions Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for an 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.

Campus Solutions also provides component interfaces to help you load data from the existing system into Campus Solutions tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables. Each product's specific component interfaces are discussed in its associated Getting Started topic.

Other Sources of Information

In the planning phase of an implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface, with information about where to find the most current version of each.

See *PeopleTools: Setup Manager*

Additional Information for Getting Started with Campus Solutions

The documentation for each application provides implementation and processing information for the Campus Solutions system. However, additional, essential information describing the setup and design of the system appears in two companion volumes of documentation:

- Campus Solutions Application Fundamentals (this documentation).
- Campus Community Fundamentals.

Campus Solutions Application Fundamentals documentation consists of important topics that apply to many or all applications across the Campus Solutions product line. Whether you are implementing only one application, some combination of applications within the product line, or the entire Campus Solutions system, you should be familiar with the contents of this central documentation (the documentation you are reading). It is the starting point for fundamentals, such as setting up control tables and administering security.

Campus Community Fundamentals documentation provides documentation on the Campus Community features that are basic to all the applications. Campus Community enables you to maintain and manage a wide range of biographic and demographic information on people and organizations of interest to an institution, both internal and external.

See Campus Community Fundamentals

Deferred Processing

Several pages in the Campus Solutions applications operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

Chapter 2

Setting Up and Using PeopleSoft Fluid User Interface Home Pages

Understanding PeopleSoft Fluid User Interface Homepages

Oracle's PeopleSoft has two user interfaces:

- PeopleSoft Fluid User Interface is a responsive interface that dynamically adapts according to the size of the browser window on various devices (smartphone, desktop, laptop, or tablet).

  Oracle delivers Fluid pages for a variety of Campus Solutions self-service transactions. With PeopleTools 8.55, PeopleSoft Fluid User Interface is set as the default interface.

  Fluid mode is enabled in web profiles. If Fluid mode is disabled, Fluid pages and content references throughout the system are disabled. Users can still access the Classic versions of pages that have both Classic and Fluid versions, but transactions that exist only as Fluid components are not accessible. If Fluid mode is enabled, an additional web profile setting controls whether Fluid mode is available on desktop devices as well as mobile devices. On desktop devices, Fluid pages appear only if the browser supports the PeopleSoft Fluid User Interface. Users with older browsers see only Classic pages even if Fluid mode is enabled for desktop devices.

- PeopleSoft Classic User Interface is designed to be used on a laptop and desktop.

  This interface was previously known as PIA (PeopleSoft Internet Architecture).

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.
- *PeopleTools: Fluid User Interface Developer's Guide*
- *PeopleTools: Portal Technology*, Administering Homepages and Dashboard Pages
- *PeopleTools: Portal Technology*, Creating and Managing Tiles
- *PeopleTools: Portal Technology*, Working with Navigation Pages and Navigation Collections

Fluid Homepages

Homepages are collections of tiles that users select to access transactions. A homepage can display different tiles on different form factors.

Users can have multiple homepages. The main Fluid Home provides access to all of these homepages. Fluid Home appears when users sign into the system in Fluid mode (that is, when users sign in from a mobile device or, if Fluid is enabled for desktop devices, from a browser that supports Fluid pages). Users can additionally access the Fluid Home by selecting Fluid Home from the Classic menu.

Fluid Home initially displays the user's default homepage. To access a different homepage, users select the homepage title and then select a different homepage from the list that appears. Selecting a tile on a homepage opens the corresponding transaction. Most of the delivered tiles open Fluid pages, but a few open Classic pages.

Homepage tiles can also display dynamic information. Depending on how the homepage and tiles are set up, users can choose which tiles appear on each homepage.

Campus Solutions delivers the following homepages, which are described in these topics:

- Using the Student Homepage
- Using the Applicant Home Page
- Using the Contributor Relations Homepage
- Using the Advisor Homepage
- Using the Faculty Homepage
- Using the Campus Solutions Administrator Homepage

Navigation Collections

To facilitate navigation to other components that use the Classic interface, Campus Solutions delivers sample navigation collections on the Campus Solutions Administrator Home page. Navigation collections provide an alternative to menu navigation and allow generic users to create their navigation collections and tiles.

For more information, see Working With Navigation Collections.

Common Elements Used with PeopleSoft Fluid User Interface

A standard banner appears at the top of every Fluid page. The banner includes the page title and these standard buttons:

Term	***Definition***
(Recently Visited)	Select to view the list of pages you recently accessed.
(Favorites)	Select to see a list of pages you tagged as a favorite.
(Accessibility)	Select to see access accessibility-related functions like screen reader or keyboard shortcuts.
(Search)	Select to access Global Search functionality. **Note:** Related actions from Global Search results are *not* supported on phones, but they are supported when viewed on laptops and tablets.

Term	***Definition***
(Home)	Select to return to the main PeopleSoft Homepage.
(Notifications)	Select to view actions and alerts in a notifications window.
(Actions List)	Select to see a list of available actions for the current window. The Sign Out command is always available under this menu, as are context-appropriate personalization options.
(Navigation Bar)	Select to use the Navigation Bar (NavBar). The NavBar provides handy navigation options such as Recent Places, My Favorites, Navigator (which expands to show the Classic menu hierarchy), and Classic Home. Users can also add and remove Fluid tiles from the NavBar using personalization options.

Personalizing a Homepage

Depending on the homepage setup, you may be able to personalize your homepage. For information on personalizing homepages, see “Working With Fluid Homepages” in *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.

Understanding Delivered Fluid Pages

This section lists:

- Fluid Pages for Campus Solutions Core Functionality
- Fluid Pages for PeopleSoft Academic Advisement
- Fluid Pages for PeopleSoft Campus Community
- Fluid Pages for PeopleSoft Contributor Relations
- Fluid Pages for PeopleSoft Financial Aid
- Fluid Pages for PeopleSoft Recruiting and Admissions
- Fluid Pages for PeopleSoft Student Financials
- Fluid pages for PeopleSoft Student Records
- Fluid pages for Faculty Center

Fluid Pages for Campus Solutions Core Functionality

Fluid Page	***Image Delivered***	***References***
Student Homepage	1	See Using the Student Homepage.
Applicant Homepage	2	See Using the Applicant Home Page.
Contributor Relations Homepage	2	See Using the Contributor Relations Homepage.
Advisor Homepage	8	See Using the Advisor Homepage.
Faculty Homepage	32	See Using the Faculty Homepage.
Campus Solutions Administrator Homepage	2	See Using the Campus Solutions Administrator Homepage.
Personalize page	1	See *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface
Publish page	1	
My Preferences tile	1	See Using the Student Homepage.
Campus Preferences page	3	See “Using Campus Preferences” (Campus Self Service).
Preferences Configuration page	3	See “Setting Up Preferences in PeopleSoft Fluid User Interface” (Campus Community Fundamentals).

Fluid Pages for PeopleSoft Academic Advisement

Fluid Page	***Image Delivered***
Academic Progress (tile)	2
Academic Progress Start page	2
Academic Progress Summary page	2
Academic Progress page	2
Requirement Details page	3

Fluid Page	***Image Delivered***
Course Requirement Alerts page	3
Expected Graduation Term page	2
Advisors page	2

See “Monitoring Academic Progress Using the PeopleSoft Fluid Interface” (Campus Self Service).

Fluid Pages for PeopleSoft Campus Community

Fluid Page	***Image Delivered***	***References***
Profile (tile)	1	See Using the Student Homepage
Personal Details page	1	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Biographic Details page	6	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Contact Details page	1	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Country Exclusions page	9	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Addresses page	1	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Emergency Contacts page	1	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
IPEDS Ethnicity page	5	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Ethnic Background page	5	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Privacy Restrictions page	5	See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid Page	***Image Delivered***	***References***
Agreements page (for activity guides)	2	See “Understanding Student Activity Guides” (Campus Community Fundamentals).
Launch page (for activity guides)	2	See “Understanding Student Activity Guides” (Campus Community Fundamentals).
Submit page (for activity guides)	2	See “Understanding Student Activity Guides” (Campus Community Fundamentals).
Tasks (tile)	2	See Using the Student Homepage
To Do List page	2	See “Using Self-Service Checklists Data” (Campus Self Service).
Holds page	2	See “Setting Up Checklist Items” (Campus Community Fundamentals).
Personal Details Configuration page	1	See “Defining Personal and Biographical Details” (Campus Self Service).

Fluid Pages for PeopleSoft Contributor Relations

Fluid Page	***Image Delivered***
Donor Prospects (tile)	2
Prospect Search page	2
Prospect Details page	2
Prospect Actions page	2
Action Detail page	2
Prospect Strategies page	2
Strategy Detail page	2
Person Profile page	2
Organization Profile page	2

See “Managing Prospects Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid Pages for PeopleSoft Financial Aid

Fluid Page	***Image Delivered***
Financial Aid (tile)	2
Award Summary page (smartphone only) Summary page (tablet or desktop only)	2
Accept/Decline page	2
Outstanding Offers page	2
Manage Accepted Awards page	2
Disbursements page	4
Outside Aid page	6
Report Outside Aid page	6
View Outside Aid page	6
Need Summary page	6
Cost of Attendance page	6
Expected Family Contribution page	6

See “Managing Financial Aid Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid Pages for PeopleSoft Recruiting and Admissions

Fluid Page	***Image Delivered***	***References***
Admissions (tile)	2	See “Managing Applications Using PeopleSoft Fluid User Interface” (Campus Self Service).
Select a Value page	2	See “Managing Applications Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid Page	***Image Delivered***	***References***
Application Status page	2	See “Managing Applications Using PeopleSoft Fluid User Interface” (Campus Self Service).
To Do List page	2	See “Managing Applications Using PeopleSoft Fluid User Interface” (Campus Self Service).
Requests page	6	See “Managing Applications Using PeopleSoft Fluid User Interface” (Campus Self Service).
Wait List Offer page	6	See “Managing Applications Using PeopleSoft Fluid User Interface” (Campus Self Service).
Approvals (tile)	7	See “Approving Admissions Transactions Using PeopleSoft Fluid User Interface” (Recruiting and Admissions).
Pending Approvals page	7	See “Approving Admissions Transactions Using PeopleSoft Fluid User Interface” (Recruiting and Admissions).
Pending Approvals - <Transaction Details> page	7	See “Approving Admissions Transactions Using PeopleSoft Fluid User Interface” (Recruiting and Admissions).
Approvals History page	7	See “Approving Admissions Transactions Using PeopleSoft Fluid User Interface” (Recruiting and Admissions).
Approvals History - <Transaction Details> page	7	See “Approving Admissions Transactions Using PeopleSoft Fluid User Interface” (Recruiting and Admissions).

Fluid Pages for PeopleSoft Student Financials

Fluid Page	***Image Delivered***	***References***
Financial Account (tile)	2	See “Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service).
Account Balance page	3	See “Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid Page	***Image Delivered***	***References***
Make a Payment page • Specify Payment Amount page • Select Payment Method page • Confirm Payment Amount page • Submit Payment page • Payment Result page	3	See “Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service).
Make a Payment – Official Transcript page • Select Payment Method page • Confirm Payment Amount page • Third Party Page • Submit Payment page • Payment Result page	9	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
Charges Due page	3	See “Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service).
Direct Deposit page	5	See “Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service).
Direct Deposit Details page	5	See “Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service).
Payment History page	5	See “Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid pages for PeopleSoft Student Records

Fluid Page	***Image Delivered***	***References***
Academic Records (tile)	2	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid Page	***Image Delivered***	***References***
Academic Records Start page	2	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
Course History page	2	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
View Grades page	2	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
Milestones • General Information • Advisors/Committee • Attempts • Documents/Attachments	27	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
View Unofficial Transcript page	6	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
Request Official Transcript page • Submit Request • View All Requests	9	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
Enrollment Verifications page	21	See “Managing Academic Records Using PeopleSoft Fluid User Interface” (Campus Self Service).
Application for Graduation • My Academic Programs • Graduation Term • Diploma/Degree Name • Address • Contact Details • Additional Information • Submit	25	See: • “Managing Fluid Applications for Graduation” (Student Records) • “Applying for Graduation Using PeopleSoft Fluid User Interface” (Campus Self Service)

Fluid Page	***Image Delivered***	***References***
Manage Classes (tile)	2	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Manage Classes Start page	2	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
View My Classes page	2	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Shopping Cart page	3	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Class Search and Enroll page	4	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Class Search Results page	4	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Course Information page	4	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Select Academic Career page	5	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Review Class Selection page	4	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Review Class Preferences page	4	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Enroll or Add to Cart page	4	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Review and Submit page	4	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid Page	***Image Delivered***	***References***
Confirmation page	4	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Select Classes to Drop page	3	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Review Classes to Drop page	3	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Update Classes page	5	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Alternative Class Options page	5	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Class Preferences page	5	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Swap Classes page	5	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Confirm Class Swap page	5	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).
Browse Course Catalog page	6	See "Browsing the Course Catalog Using PeopleSoft Fluid User Interface" (Campus Self Service).
Course Search Results page	6	See "Browsing the Course Catalog Using PeopleSoft Fluid User Interface" (Campus Self Service).
Course Details page	5	See "Browsing the Course Catalog Using PeopleSoft Fluid User Interface" (Campus Self Service).
Planner page	6	See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).

Fluid Page	***Image Delivered***	***References***
Enroll by My Requirements page	6	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).
Enrollment Appointments page	20	See “Managing Classes Using PeopleSoft Fluid User Interface” (Campus Self Service).

Fluid pages for Faculty Center

Fluid Page	***Image Delivered***	***References***
View My Schedule	32	See “Using the Self-Service Faculty Center” (Campus Self Service).
Class Roster	32	See “Using the Self-Service Faculty Center” (Campus Self Service).
Grade Roster	32	See “Using the Self-Service Faculty Center” (Campus Self Service).

Working With Navigation Collections

Campus Solutions delivers navigation collections on the Campus Solutions Administrator homepage. Previously, you can navigate to Campus Solutions components using the classic hierarchical menus. With PeopleTools 8.55, the default interface is PeopleSoft Fluid User Interface, and in Fluid the menus have been replaced with tiles and homepages.

Navigation collections are sets of links that allow you to quickly access various components within Campus Solutions. These links facilitate the performance of business processes within your organization.

The primary users of Navigation Collection tiles are school administrators. System administrators can modify a Navigation Collection tile to include links to any component or page in Campus Solutions.

To publish your own navigation collection or modify an existing one, use these instructions for:

1. Creating or Editing a Navigation Collection
2. Creating Folder Definitions for the Navigation Collection
3. Creating or Editing Homepages

See Also *PeopleTools: Portal Technology*

Understanding Folders and Content References

Every component delivered with PeopleSoft applications is registered as a content reference in the portal registry. Common administrative tasks include adding, deleting, and renaming these definitions in the portal. In the portal registry, folders organize content references into a multilevel hierarchy. A folder can contain content references and other folders. When you create folder definitions, you explicitly configure the properties, attributes, and position of the folder in the hierarchy. The portal uses your configurations to create the menu structure

For information on folder and content reference administration, see*PeopleTools: Portal Technology*, Administering Portals.

Campus Solutions Sample Navigation Collections

The Campus Solutions Administrator homepage contains these sample navigation collections.

Student Customer Service Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Student Services Center	SSS_STUDENT_CENTER	**Campus Community > Student Services Ctr (Student)**
Application Summary	ADM_APPL_SUMM	**Student Admissions > Applicant Summaries > Application Summary**
Enrollment Summary	STDNT_ENRL_INQ	**Records and Enrollment > Enrollment Summaries > Enrollment Summary**
View Financial Aid Status	SS_FA_AU_STATUS	**Financial Aid**
View Customer Accounts	ACCOUNT_VW_GBL4	**Student Financials**
Communication Summary	COMM_SUMMARY_PERS	**Campus Community > Communications > Person Communication**

Campus Community Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Add/Update a Person	SCC_BIO_DEMO	**Campus Community > Personal Information**
Checklist Management - Person	CHKLST_MANAGEMENT	**Campus Community > Checklists > Person Checklists**
Communication Management	COMM_MANAGEMENT	**Campus Community > Communications > Person Communications**
Person Comment Entry	CMNT_ENTRY	**Campus Community > Comments > Comments - Person**
Manage Service Indicators	ACTIVE_SRVC_INDICA	**Campus Community > Service Indicators > Person > Manage > Service Indicators**

Recruiting and Admissions Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Maintain Applications	ADM_APPL_MAINTNCE	**Student Admissions > Application Maintenance > Maintain Applications**
Application Transactions	SAD_APPL_STG	**Student Admissions > Application Transaction Management > Application Transactions**
Prospect/Admissions Staging	SAD_PDL_DATA_STG	**Student Recruiting > Prospect / Admissions Data Management**
Education	ACAD_HISTORY_ADMA	**Application Entry > Academic Information > Education**

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Test Results	STDNT_TEST_SCORE	**Application Entry** > **Academic Information** > **Test Results**

Student Records Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Maintain Schedule of Classes	CLASS_ENTRY	**Curriculum Management** > **Schedule of Classes** > **Maintain Schedule of Classes**
Student Program/Plan	STDNT_PROG	**Records and Enrollment** > **Career and Program Information** > **Student Program/Plan**
Student Grades	STDNT_GRADE_INQ	**Records and Enrollment** > **Student Term Information** > **Student Grades**
Quick Enroll a Student	QUICK_ENROLL	**Records and Enrollment** > **Enroll Students** > **Quick Enroll a Student**
Enrollment Summary	STDNT_ENRL_INQ	**Records and Enrollment** > **Enrollment Summaries** > **Enrollment Summary**
Class Roster	CLASS_ROSTER	**Curriculum Management** > **Class Roster**

Financial Aid Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Assign Awards to a Student	STDNT_AWARD_ENTRY3	**Financial Aid** > **Awards** > **Award Processing**
View Award Activity	STDNT_AWRD_ACTV	**Financial Aid** > **Awards**

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Correct 2016-2017 ISIR Records	ISIR_CORRPIA17	**Financial Aid** > **Federal Application Data**
Maintain Student FA Term	STDNT_FA_TERM	**Financial Aid** > **Financial Aid Term**
View Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid

Student Financials Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
AP Refunding Support • View Customer Accounts • Student Refund • View Corporate Accounts • Corporate Refund	User Defined Nav Folder • ACCOUNT_VW • REFUND_SF_2 • ACCOUNT_ORG_SF • Refund_ORG_SF	**Student Financials** > **Refunding**
AP Refunding • Review Student Vendors • Review Corporate Vendors • Review Voucher Data • Create Vendors and Vouchers • Student Vendor IDs	AP_REFUNDING • SF_EMP_VNDR_INQ • SF_ORG_VNDR_INQ • SF_VCHR_INQ • AP_REFUND • VENDOR_ID	**Student Financials** > **Refunding**
AP Direct Deposit • Direct Deposit – Student • Direct Deposit – Corporate • Create Refund Vouchers • Review Vouchers • Revoke Direct Deposit	DIRECT_DEPOSIT_REFUNDS • SSF_ADMIN_DIR_DEP • SSF_DIRDEP_CORP • SSF_REFUND_VOUCHER • SSF_VCHR_REVIEW_V2 • SSF_DDENRL_REVOKE	• **Student Financials** > **Refunding** • **Bill Customers** > **Corporate Bills** • **Records and Enrollment** > **Enrollment Summaries**

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Third Party Contract Support • Assign to Third Party Contract • Review Results by Contract • View Customer Accounts • View Corporate Accounts • Review Corp Invoice • Enrollment Summary	User Defined Nav Folder • TP_STUDENT • SSF_PS_TPC_REVIEW • ACCOUNT_VW • ACCOUNT_ORG_SF • BI_BILL_HEADER_ORG • STDNT_ENRL_INQ	• **Administer Payment Plans** > **Assign** • **Administer Payment Plans** > **Assign** • **Administer Payment Plans** > **Assign** • **Administer Payment Plans** > **Assign** • **Bill Customers** > **Corporate Bills** • **Records and Enrollment** > **Enrollment Summaries**
View Accounts • View Customer Accounts • View Corporate Accounts	User Defined Nav Folder • ACCOUNT_VW • ACCOUNT_ORG_SF	• **Student Financials** > **View Customer Accounts** • **Student Financials** > **View Corporate Accounts**
Collections • Collection Agreement • Process Collections • Put Customers in Collection • Put Corporations in Collection • Assign Customers to Worklist • Assign Corporations to Worklist	COLLECT_RECEIVABLES • COLL_AGREEMENT • COLLECTIONS_SF • SSF_ASGN_COLLECT • SSF_ASGN_COLL_ORG • RUN_COLLECT • RUN_COLLECT_ORG	**Student Financials** > **Collections**

Academic Advisement Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Advisee Student Center	SSS_STUDENT_CENTER	**Self Service** > **Advisor Center**

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Request Advisement Report	SAA_RPT_RQST	**Academic Advisement > Student Advisement**
Authorize Student Exceptions	STDNT_RQ_DIRECTIVE	**Academic Advisement > Student Advisement**
Create Course Substitution	STDNT_CRS_SUBS	**Academic Advisement > Student Advisement**
Advising Notes	SAA_ADV_NOTE	**Academic Advisement > Student Advisement**

Contributor Relations Tile

Page/Component	***Definition Name/Content Reference (CREF)***	***Classic Page Navigation***
Person Profile	AV_PRSN_BIO_DEMO	**Contributor Relations > Constituent Information > People > Person Profile**
Organization Profile	AV_ORG_PROFILE	**Contributor Relations > Constituent Information > Organizations > Organization Profile**
Giving Profile	AV_P_GPROFILE	**Contributor Relations > Analyze Giving History > Person Giving Summaries > Giving Profile**
Giving Profile - Org	AV_P_GPROFILE_E	**Contributor Relations > Analyze Giving History > Organization Giving Summaries > Giving Profile - Org**
Manage Worksets	AV_WORKSET	**Contributor Relations > Constituent Information > Workset > Manage Worksets**

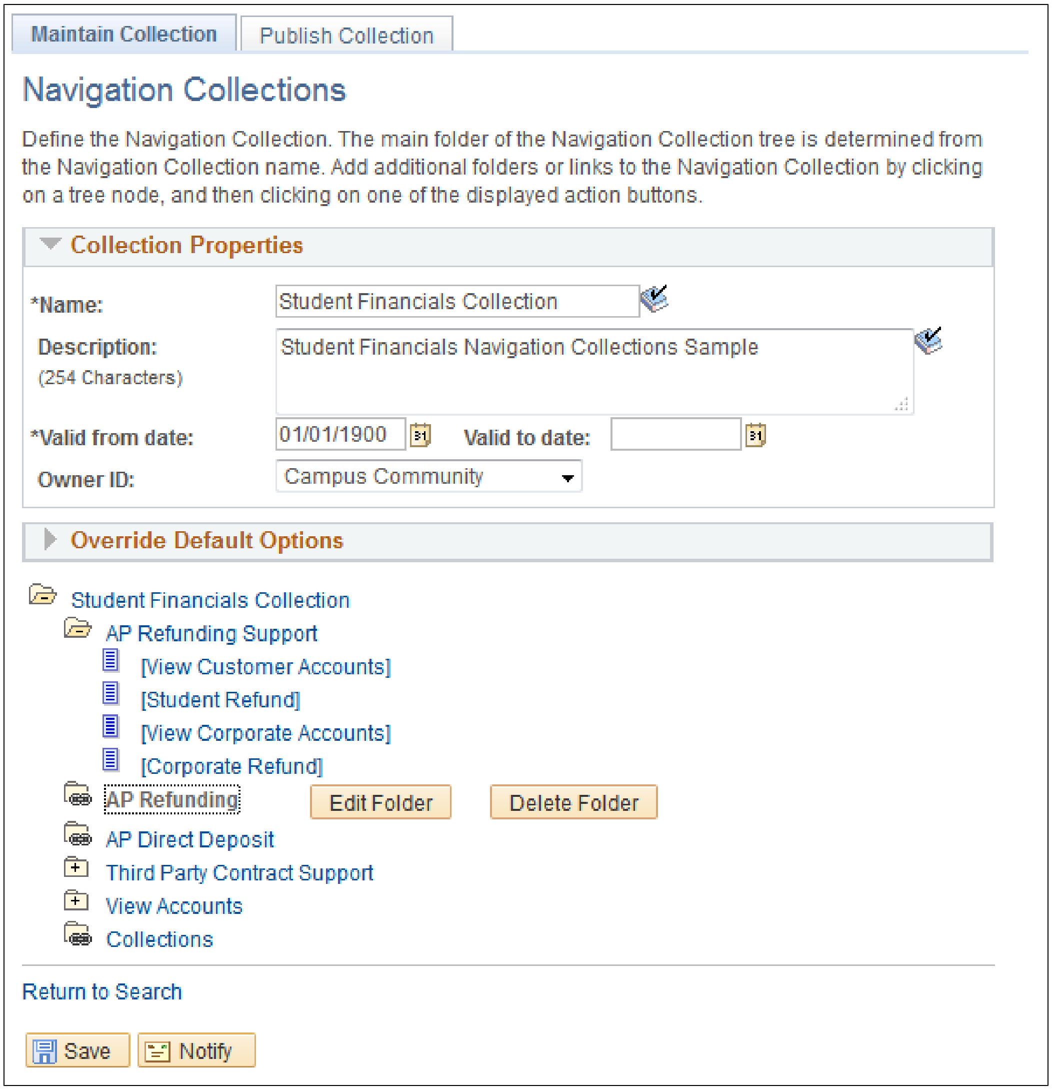
Pages Used to Work With Navigation Collections

Page Name	*Definition Name*	*Usage*
Maintain Collection	PTPP_SCMAINTCOLL	Create or edit a navigation collection. From this page you can add folders or links.
Publish Collection	PTPP_SCPUBLISHCOLL	Define more security options for your navigation collection. See *PeopleTools: Portal Technology*, Working with Navigation Pages and Navigation Collections.
Folder Administration	PORTAL_FLDR_ADM	Create folder definitions for your navigation collection.
Folder Security	PORTAL_FLDR_SEC	Set folder permissions.
Content Ref Administration	PORTAL_CREF_ADM	Define content references for the navigation collection.
Content Reference Security	PORTAL_CREF_SEC	Set the permissions for the content reference.
Fluid Attributes	PORTAL_GROUPLET	Specify tile information.

Creating or Editing a Navigation Collection

Access the Maintain Collection page (**Navigator** > **Portal** > **Portal Utilities** > **Navigation Collections**).

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



Use the Maintain Collection page to build your navigation collection.

1. From Fluid home, click **NavBar** > **Navigator** > **PeopleTools** > **Portal** > **Portal Utilities** > **Navigation Collections**.

2. If you are creating a new collection, click **Add Collection**.

3. If you are editing an existing collection:

   a. Search for the existing collection.

   b. Click **Edit**.

4. See *PeopleTools: Portal Technology*, “Working with Navigation Pages and Navigation Collections” for more instructions on creating or editing a navigation collection.

5. Take note of the following fields in these pages:

Page	***User Interface Elements or Fields***
Maintain Collection	**Valid from date**: Enter or set the date to *01/01/1900*.
Add Folder	**Folder Type**: Select *User Defined Folder*.
Add Link	**Open in a new window** and **Replace Window**: Make sure these check boxes are not selected.

Creating Folder Definitions for the Navigation Collection

To create folder definitions, see “Administering Folders” in *PeopleTools: Portal Technology*, Administering Portals.

Creating or Editing Homepages

To display the navigation collection so users can access them:

- Use the Tile Wizard to link the navigation collection to a tile. See *PeopleTools: Portal Technology*, Creating and Managing Tiles.
- Configure your homepage. See “Managing Homepages” in *PeopleTools: Portal Technology*, Administering Homepages and Dashboard Pages.

Setting Up Fluid Configuration

The Fluid Configuration component lets you define processing options for tiles on the Student Homepage.

This section describes how to:

- Configure the Academic Progress tile.
- Configure the Financial Accounts tile.
- Configure Student Records activity guide options.
- Configure fluid Faculty Center options.

Pages Used to Set Up Fluid Configuration

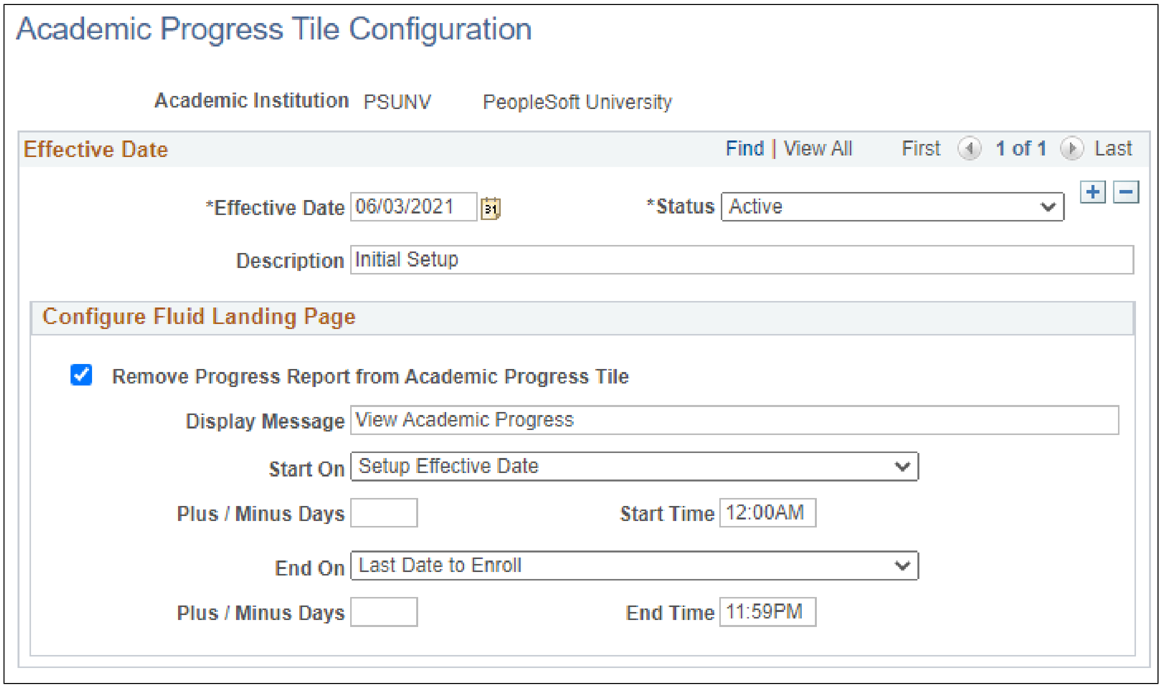
Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Progress Tile Configuration	SAA_IN_SETUP_FL	**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **AA Tile Configuration**	Disable the academic progress report on the Academic Progress tile.
Financial Account Tile Configuration	SSF_IN_SETUP_FL	**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **SF Tile Configuration**	Disable tuition calculation on the Financial Account tile.
Student Records Activity Guide Options	SSR_IN_SETUP_FL	**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **SR Activity Guide Options**	Configure the options that appear to students when they complete the enrollment or add tasks to cart.
Faculty Center Setup	SSR_FC_SETUP_FL	**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **Faculty Center** > **Faculty Center Setup**	Configure the options for classes, schedules, and rosters in fluid Faculty Center.

Configure the Academic Progress Tile

Use this page to disable the academic progress report on the Academic Progress tile during a specific date range.

Access the AA Tile Configuration page (**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **AA Tile Configuration**).

This example illustrates the fields and controls on the Academic Progress Tile Configuration page. You can find definitions for the fields and controls later on this page.



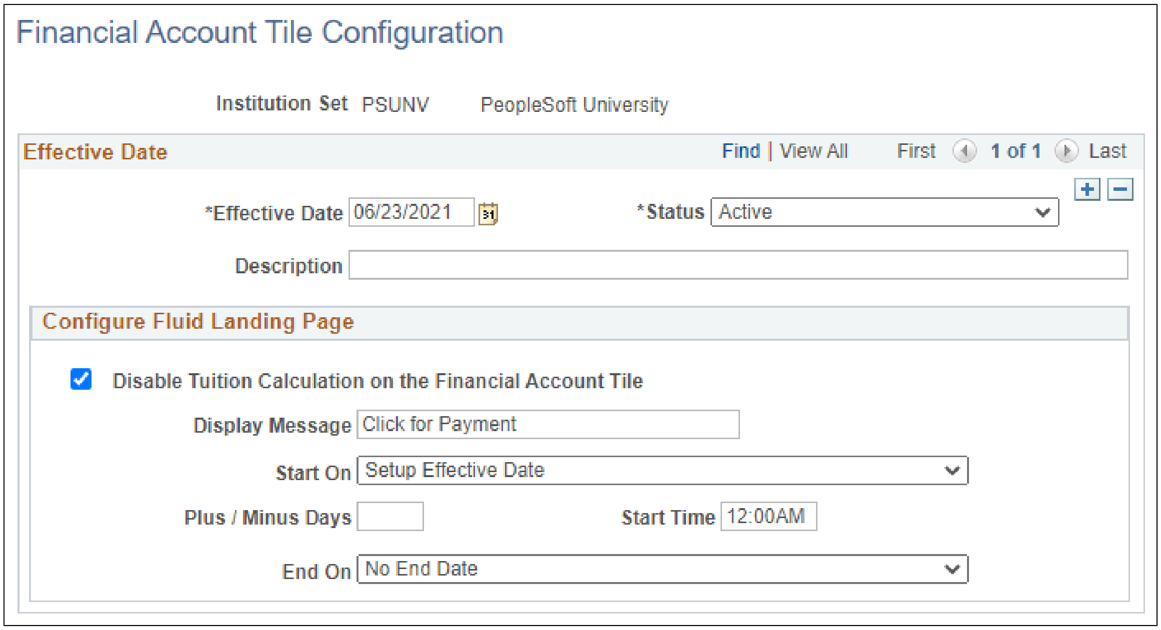
Field or Control	*Description*
Remove Progress Report from Academic Progress Tile	Select to disable academic progress report. The report isn't automatically run, and academic progress doesn't appear on the Student homepage. It is displayed only after students select the Academic Progress tile.
Display Message	Enter a message to encourage students to select the tile.
Start On Date **End On Date**	Define the date range in which the academic progress report is disabled.

Configure the Financial Account Tile

Use this page to disable tuition calculation on the Financial Account tile.

Access the Financial Account Tile Configuration page (**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **SF Tile Configuration**).

This example illustrates the fields and controls on the Financial Account Tile Configuration page. You can find definitions for the fields and controls later on this page.



Students' access to the Financial Account tile is determined by the institution set. Configuring the Financial Account tile is used in combination with the SF institution set.

The tuition calculation control **Auto Calculate Self Service** is used to define the terms for tuition calculation. For more information on calculating tuition in self-service, see:

- “Establishing Tuition Calculation Controls” (Student Financials)
- “Setting Up Institution Sets” (Student Financials)

Configure Fluid Landing Page

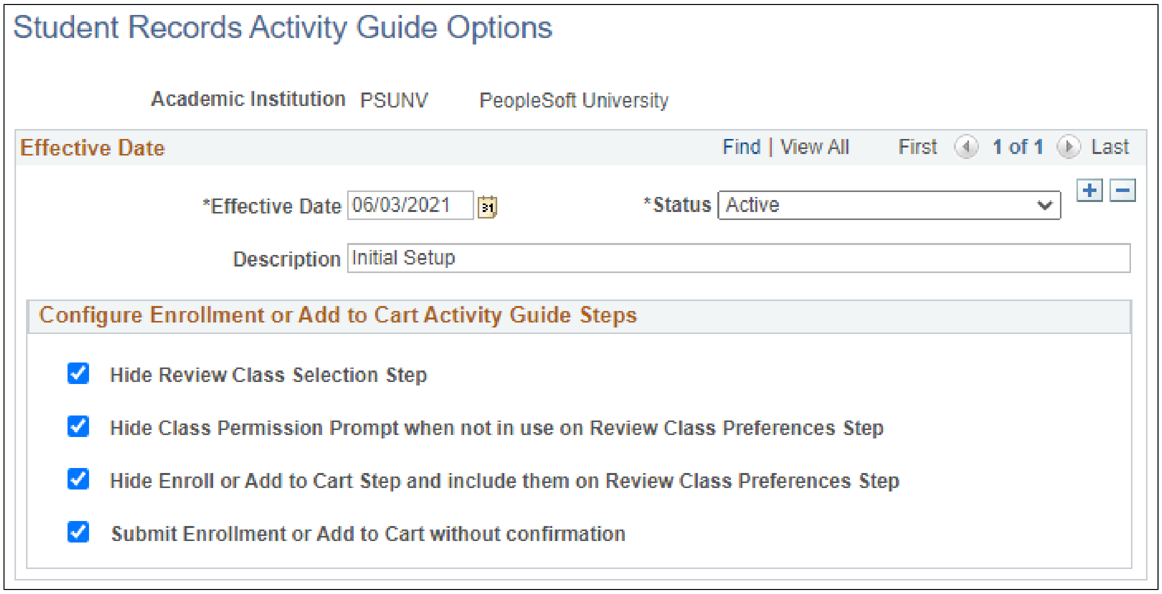
Field or Control	***Description***
Disable Tuition Calc on the Financial Account Tile	If you select this, tuition calculation isn't run until after students select the Financial Account tile.
Display Message	Enter a message to encourage students to select the tile.
Start On Date **End On Date**	Define the date range in which tuition calculation is disabled on the Financial Account tile.

Configure Student Records Activity Guide Options

Use this page to configure the options that appear to students when they complete the enrollment or add to cart tasks.

Access the Student Records Activity Guide Options page (**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **SR Activity Guide Options**).

This example illustrates the fields and controls on the Student Records Activity Guide Options page. You can find definitions for the fields and controls later on this page.



Configure Enrollment or Add to Cart Activity Guide Steps

In this region, select the options that determine how the enrollment activity guide appears to students.

Field or Control	***Description***
Hide Class Permission Prompt when not in use on Review Class Preferences Step	If you're not using class permission, select this option to hide Permission Number from the Review Class Preferences step.
Submit Enrollment or Add to Cart without confirmation	Hide the Confirmation button, but submit students' enrollment or cart.

Configure Fluid Faculty Center Options

Configure the options for classes, schedules, and rosters in fluid Faculty Center.

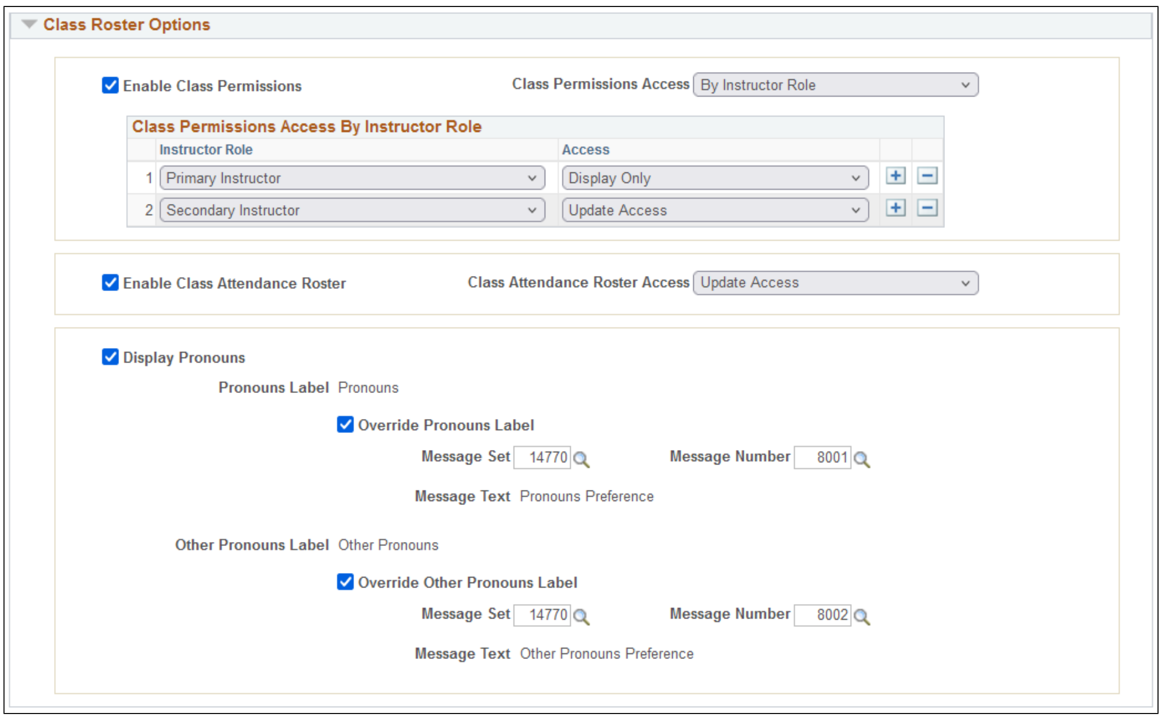
Access the Faculty Center Setup page (**Set Up SACR** > **Common Definitions** > **Self Service** > **Fluid Configuration** > **Faculty Center** > **Faculty Center Setup**).

View My Schedule Option

Field or Control	***Description***
Display Time Conflict on My Schedule	Select if you want to conflicting schedules to be displayed when instructors view their schedules.

Class Roster Options

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



Field or Control	***Description***
Enable Class Permissions	Select to allow instructors to access class permissions. **Show Class Permissions** appears on the fluid Class Roster page.

Field or Control	*Description*
Class Permissions Access	The option you select indicates whether faculty members have the ability to update data in permissions or attendance fluid pages. This setting works in combination with the **Enable Class Permissions** checkbox. • **By Instructor Role**: This option lets you set different access types for each instructor role. Instructor roles are determined from the class schedule for the class section. For example, you can set a Primary Instructor to have display-only access, a Secondary Instructor with update access, and so on. • **Display Only**: This option means that all faculty members will have display-only access. They won't be able to edit anything. • **Update Access**: This option gives all faculty members the ability to update data.
Enable Class Attendance Roster	Select to allow instructors to access the class attendance roster. **Show Attendance Roster** appears on the fluid Class Roster page.
Class Attendance Roster Access	The options that are available here work in the same way as those in Class Permissions Access.
Display Pronouns	The options in this region control whether a students' pronouns appear on the class roster. You can override the field label by using your own message catalog.

View My Schedule/Rosters Meeting Option

Field or Control	*Description*
Maximum Rows to Display	Enter the maximum number of meeting days or times for each class section. These are displayed on the fluid View My Schedule page.
Message when maximum exceeded	Enter the message you would like to display if the maximum rows to display is exceeded. For example, if you set a maximum of 5 rows to display and there are more than 5 rows of information, the message you enter will be displayed to indicate to users that there are more rows of information.

Field or Control	***Description***
Message to Return to Maximum	Enter the message you would like to display to let users get back to seeing only the maximum number of rows.

Class Information Option

Field or Control	***Description***
Display Textbook Summary	Selecting this checkbox controls whether assigned textbooks are displayed in Class Details in Fluid Faculty Center.

Class Label Option

Field or Control	***Description***
Label	Enter a label that appears before the source.
Source	Select a source of the label from any of the available options.
Use Component Code	This option is valid only if the source you select is Class Component. If you select this checkbox, the short version of the component code for the label appears. For example, if the component is Lecture, then the label appears as LEC instead.
Blank Separator	Selecting this checkbox adds a blank space in the class label.

Using the Student Homepage

This topic describes the delivered Student Homepage.

Page Used to Access the Student Homepage

Page Name	***Definition Name/Content Reference (CREF)***	***Usage***
Student Homepage	CS_SCC_STUDENT_HOMEPAGE_FL	Access a variety of Student self-service transactions.

Student Homepage

Use the Student Homepage to access a variety of self-service transactions.

Navigation:

On a mobile device, the Fluid home appears when you first sign in. On a desktop or laptop, access the Fluid home by selecting **Fluid Home** from the main menu or the NavBar.

The default homepage title appears at the top of the homepage. If the Student Homepage is not your default homepage, select the title of the default homepage and select Student Homepage from the list that appears.

Tiles on the Student Homepage

Tiles are listed in alphabetical order. Depending on the homepage setup, you may be able to choose which tiles appear on the homepage.

You can configure processing options for some tiles. For information, see Setting Up Fluid Configuration.

Tile Name	***Description***
Academic Progress	Select this tile to: • View summary of academic progress • View academic progress details, academic requirements, and course details • View course requirement alerts • View expected graduation term • View and e-mail advisors • Refresh advisement report data
Academic Records	Select this tile to: • View course history • View grades • View unofficial transcript • Request official transcript • Request enrollment verification, which you can then view or print from a web browser or submit a mail request • Apply for graduation. See "Applying for Graduation Using PeopleSoft Fluid User Interface" (Campus Self Service).

Tile Name	***Description***
Financial Account	Select this tile to: • View your account balance • Make payments • View charge and deposit due dates • Enroll in direct deposit • View payment history For more information, see "Managing Financial Accounts Using PeopleSoft Fluid User Interface" (Campus Self Service).
Financial Aid	Select this tile to: • View award summary • Accept or decline awards • View disbursement information • Report outside aid • View financial aid summary
Manage Classes	Select this tile to: • View enrollment appointments • View a list of student classes by class and by date • View class and meeting details • Validate classes prior to enrollment using the shopping cart • Search for classes and courses • Drop, update, swap classes • View your planner, move or delete planned courses; add courses from the course catalog or My Requirements • Enroll in classes from the planner or My Requirements See "Managing Classes Using PeopleSoft Fluid User Interface" (Campus Self Service).

Tile Name	*Description*
My Preferences	Select this tile to view and edit the following: • Campus Preferences page • General Settings page See “Using My Preferences in PeopleSoft Fluid User Interface” (Campus Self Service).
Profile	Select this tile to view and edit: • Personal Details • Biographic Details • Contact Details • Addresses • Emergency Contacts • Ethnicity: IPEDS Ethnicity and Ethnic Background details, if set up • Privacy Restrictions, if set up **Note:** If a Name, Email or Phone is a lengthy value and appears truncated, select the row to view the full details. Display-only records open in View Name, View Email, View Phone pages, while other records open in Edit mode pages. See “Configuring Profile Information for PeopleSoft Fluid User Interface” (Campus Self Service).
Tasks	Select this tile to view: • Checklist items and complete Activity Guide tasks (To Do items) • Holds • Agreements completed through activity guides on the Completed Agreements page, if a completed agreement exists for a user with the required security access See “Using Self-Service Checklists Data” (Campus Self Service).

Related Links

“Setting Up Self-Service Features for Student Records” (Campus Self Service)
“Reviewing or Defining Student Records Installation Settings” (Student Records)
“Defining Installation Level Defaults” (Financial Aid)
“Setting Up Installation Parameters and Keywords” (Student Financials)
“Understanding Search in PeopleSoft Fluid User Interface” (Campus Self Service)

Using the Applicant Home Page

This topic describes the delivered Applicant Homepage.

Page Used to Access the Applicant Homepage

Page Name	*Definition Name/Content Reference (CREF)*	*Usage*
Applicant Homepage	CS_SAD_APPLICANT_HOMEPAGE_FL	Access a variety of Applicant self-service transactions.

Applicant Homepage

Use the Applicant Homepage to access a variety of self-service transactions.

Navigation:

On a mobile device, the Fluid home appears when you first sign in. On a desktop or laptop, access the Fluid home by selecting **Fluid Home** under the main menu or the NavBar.

The default homepage title appears at the top of the homepage. If the Applicant Homepage is not your default homepage, select the title of the default homepage and select Applicant Homepage from the list that appears.

Tile on the Applicant Homepage

Depending on the homepage setup, you may be able to choose which tiles appear on the homepage.

Tile Name	***Description***
Admissions	Select this tile to: • view the status of an application • view checklist items • view admission decision • view/print admission decision letter • accept/decline an admission offer • accept or decline an offer to be wait-listed • submit requests for application deferral, application withdrawal, or change program or plan • upload a file • view uploaded files • pay an admissions deposit

Related Links

"Configuring Self Service Display for Applicants" (Campus Self Service)
"Managing Applications Using PeopleSoft Fluid User Interface" (Campus Self Service)

Using the Contributor Relations Homepage

This topic describes the delivered Contributor Relations Homepage.

Page Used to Access the Contributor Relations Homepage

Page Name	***Definition Name/Content Reference (CREF)***	***Usage***
Contributor Relations Homepage	Not applicable	Access a variety of Contributor Relations self-service transactions.

Contributor Relations Homepage

Use the Contributor Relations Homepage to access a variety of self-service transactions.

Navigation:

On a mobile device, the Fluid home appears when you first sign in. On a desktop or laptop, access the Fluid home by selecting **Fluid Home** under the main menu or the NavBar.

The default homepage title appears at the top of the homepage. If the Contributor Relations Homepage is not your default homepage, select the title of the default homepage and select Contributor Relations Homepage from the list that appears.

Tile on the Contributor Relations Homepage

Depending on the homepage setup, you may be able to choose which tiles appear on the homepage.

Tile Name	***Description***
Donor Prospects	Select this tile to: • search Donor Prospects • view a Prospect Profile • manage Prospect Actions • manage Prospect Strategies

Using the Advisor Homepage

This topic describes the delivered Advisor Homepage.

Page Used as the Advisor Homepage

Page Name	***Definition Name/Content Reference (CREF)***	***Usage***
Advisor Homepage	CS_SAA_ADVISOR_HOMEPAGE_FL	Access Advisor self-service transactions.

Advisor Homepage

Use the Advisor Homepage to access a variety of self-service transactions.

Navigation:

On a mobile device, the Fluid home appears when you first sign in. On a desktop or laptop, access the Fluid home by selecting **Fluid Home** under the main menu or the NavBar.

The default homepage title appears at the top of the homepage. If the Advisor Homepage is not your default homepage, select the title of the default homepage and select Advisor Homepage from the list that appears.

Tiles on the Advisor Homepage

Depending on the homepage setup, you may be able to choose which tiles appear on the homepage.

Tile Name	*Description*
My Advisees	Select this tile to open the My Advisees (SAA_ADVISOR_FL.SAA_ADV_LIST_FL) page, where you can: • view a list of your advisees in either grid or tile format. You can view the advisee's name and ID, and the committee for the advisee. • email your advisee by clicking the corresponding ID. • view your advising notes for each advisee on the Advising Notes page. On this page, you can create an advising note, or select the drop down button below the page title to view data for other advisees or students. • notify one or more advisees by selecting the corresponding **Notify** check box. You can also select the Dropdown button below the page title to select notification options, or navigate to the **Advising Notes** page.
My Advising Notes	Select this tile to open the My Advising Notes (SAA_ADVISOR_FL.SAA_ADVNOTE_SUM_FL) page, where you can: • search for and view the notes you have created or that have been assigned to you. • view, create, and update notes for other students by clicking the View data for other students button.

Related Links

"Setting Up Self-Service Features for Academic Advisement" (Campus Self Service)
Understanding PeopleSoft Fluid User Interface Homepages

Using the Faculty Homepage

The Faculty Homepage lets instructors access the fluid version of Faculty Center.

Pages Used to Access the Faculty Homepage

Page Name	*Definition Name/Content Reference (CREF)*	*Usage*
Faculty Homepage	CS_SSR_FC_STARTPG_FL_GBL	Access self-service transactions using the fluid user interface.

Faculty Homepage

Use the Faculty Homepage (<Definition Name>) to access self-service transactions using the fluid user interface.

Navigation:

On a mobile device, the Fluid home appears when you first sign in. On a desktop or laptop, access the Fluid home by selecting **Fluid Home** under the main menu or the NavBar.

The default homepage title appears at the top of the homepage. If the Faculty Homepage isn't your default homepage, select the title of the default homepage, then select Faculty Homepage from the list that appears.

Tiles on the Faculty Homepage

Tile Name	***Description***
Faculty Center	Select this tile to: • View teaching schedules. • Access the class roster. • Access the grade roster.

Related Links

"Using the Self-Service Faculty Center" (Campus Self Service)

Using the Campus Solutions Administrator Homepage

The Campus Solutions Administrator Home page contains sample navigation collections. These navigation collections support the following business processes:

- Student Customer Service. The tiles within this collection reflect the commonly used pages or components accessed by an institution's Help Desk or Customer Service Center to access detailed information about a student or other individual. The pages are not limited to just one product area.
- Product-area specific processes. The tiles within these product areas reflect the commonly used pages or components accessed by administrative staff.

Campus Solutions Administrator

Use the Campus Solutions Administrator homepage to access a variety of Campus Solutions administrative functions using navigation collections.

For information on the navigation collections on this homepage, see Working With Navigation Collections.

Navigation:

On a mobile device, Fluid home appears when you first sign in. On a desktop or laptop, access Fluid home by clicking the Home button on the banner, or selecting **Fluid Home** from the NavBar.

The default homepage title appears at the top of the homepage. If the Campus Solutions Administrator homepage is not your default homepage, select the title of the default homepage, then select **Campus Solutions Administrator** from the list that appears.

Using Drop Zones on Fluid Pages

Drop zones let you add fields to delivered pages without customizing the delivered component or page definition. Your fields are displayed and processed along with fields from the main page definition and any nested subpages or secondary pages.

To use drop zones, you need to:

1. Create a custom subpage for drop zones.
2. Configure drop zones.

For information on creating a subpage and configuring drop zones, see *Configuring Drop Zones* in "Creating Page Definitions." (*PeopleTools: Application Designer Developer's Guide*).

You can use delivered drop zones at the top and bottom of these pages:

- Campus Community
  - Personal Details
  - Biographic Details
  - Emergency Contacts
  - Contact Details
  - Addresses
  - IPEDS Ethnicity
  - Ethnic Background
  - Privacy Restrictions
  - Campus Preferences
- Financial Aid
  - Accept/Decline
  - Award Summary
  - Cost of Attendance
- Admissions - Application Status
- Student Records

- Course History
- Milestones
- View Grades
- View My Classes
- Enrollment Appointments
- Shopping Cart
- Class Search and Enroll
- Browse Course Catalog

Chapter 3

Accessing Delivered Campus Solutions WorkCenters

Delivered Campus Solutions WorkCenters

These are the delivered Campus Solutions WorkCenters.

Delivered WorkCenters

WorkCenter	***Link to Documentation***
Activity Management WorkCenter	“Managing the Activity Management WorkCenter” (Campus Self Service)
Evaluation WorkCenter	“Understanding Evaluation WorkCenter” (Campus Community Fundamentals)
Student Task WorkCenter	“Using Student Task WorkCenter” (Campus Self Service)
Task Management WorkCenter	“Managing Tasks” (Campus Community Fundamentals)

Chapter 4

Introducing Business Units and Data Sharing

Understanding PeopleSoft Business Units

Before you implement the Campus Solutions applications for an institution, take a close look at how the institution functions operationally. To make the most of PeopleSoft's flexible design, you have to first decide how you want to map the operational structures into PeopleSoft applications.

In a PeopleSoft system, a business unit is an operational subset of an organization. Business units can be independent legal entities, or organizations that need to segregate their financial data for accounting purposes, or operational centers that segregate their operations for management purposes.

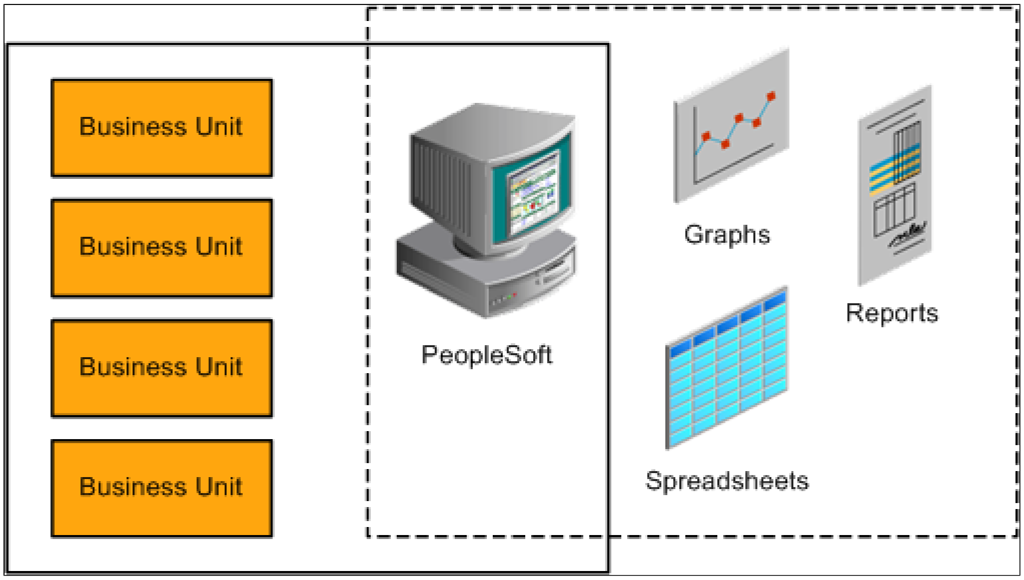
Business unit names can vary among the different applications within the PeopleSoft system. For example, PeopleSoft Student Financials and PeopleSoft General Ledger business units typically consist of different entities for financial and tax reporting purposes. You can share business units across any combination of applications in Campus Solutions, or you define them within a single application. If the entire institution keeps only one set of books, then you can have a single business unit. You must have one business unit defined for each PeopleSoft application installed, but all applications can share the same business unit. A minimum of one business unit is required for the entire suite of applications in the Campus Solutions system.

How you define a business unit depends on the institutional structure, requirements, or reporting demands, as well as how you've organized operating responsibilities. For example, an institution might separate technical or graduate school operations from its main campus operations. Transactions are stored by business unit. Reports and processes are requested by business unit and security can be enforced by business unit.

Although each business unit keeps its own set of books, the institution can still maintain a single, centralized database, reducing the effort of maintaining redundant information for each business unit and ensuring consistent and accurate consolidated results. In addition, you can produce reports across business units, enabling you to obtain a broad overview or to compare detailed information.

This diagram illustrates how centralized data enables analysis and reporting across business units:

Centralized data enables multiple business units to input data into PeopleSoft and output data in multiple formats.



Understanding Data Sharing Among Business Units

The PeopleSoft system uses business units to separate organizations within the institution. Although each business unit represents a separate organization, there is data that is shared throughout the institution. Business units can share data by using tableset sharing, which is a way to share control table information among business units to minimize redundant data and system maintenance tasks.

This section discusses:

- Tableset sharing.
- Control tables keyed by tableset ID.
- Record groups in tableset sharing.
- Business units, tablesets, and record groups.
- Set control values.
- Data sharing.

Tableset Sharing

Tableset sharing is the sharing of common control tables among business units. There are two types of tables in the PeopleSoft system that are used to store data.

Term	***Definition***
Control Tables	These tables store control lists of information; for example, department names and account codes. This data is maintained centrally by the institution and is generally entered once at implementation, and it changes little over time. The structure and processing rules for each of the PeopleSoft applications you are using are defined in a series of control tables. Control tables are usually keyed by tableset ID and are usually effective-dated.
Transaction Tables	These tables store day-to-day business activity and are updated frequently. They are keyed by business unit.

Control tables enable you to use *tableset IDs,* which make tableset sharing possible. The tableset ID indicates which of the rows in the control table a particular business unit can access. Each row in the control table has a tableset ID associated with it and business units are associated with tableset IDs through record groups:

Business units pass data through record groups to tableset IDs.

Note: The *tableset ID* is also referred to as the *setID.* These terms are interchangeable.

If much of the control table data is the same from business unit to business unit, tableset sharing enables you to share that information among business units instead of having to enter the same data multiple times. For example, suppose that an institution has 10 business units and they all use the same accounts. Instead of having to enter all of the accounts 10 times, you could enter them once and set up tableset sharing to enable all of the business units to access them.

Tableset sharing also enables you to manage exceptions within the organization. For example, suppose that 9 of the 10 business units use the same accounts, but the tenth business unit uses entirely different accounts. This is easily accommodated through tableset sharing.

The two following tables show how different business units access a centralized control table based on tableset ID. In the example, there are three tableset IDs—MAINC, EASTC, and WESTC—representing three campuses. The account number information for all campuses is contained in a single control table. Allowing access to certain tableset IDs can restrict access to the account number information. For example, East Campus (EASTC) can view only its two account numbers when it accesses the control table.

Here are the accounts for all three campuses:

Tableset ID	***Account Number***
MAINC	0000090345
MAINC	0000090346
EASTC	0000090347
MAINC	0000090348
EASTC	0000090349
WESTC	0000090350

This view shows only the accounts for East Campus:

Tableset ID	***Account Number***
EASTC	0000090347
EASTC	0000090349

See *PeopleTools: Data Management*, "PeopleTools Utilities."

Control Tables Keyed by Tableset ID

Here are some examples of the control tables keyed by tableset ID for each application in Campus Solutions. This information can help you decide how the data can be segmented, so that you make the correct decisions when setting up the tableset IDs and assign the correct tableset IDs to record groups.

Note: This list is not exhaustive.

This table lists some examples of control tables keyed by tableset ID:

PeopleSoft Application	***Control Tables Keyed by Tableset ID***
PeopleSoft Student Records	FACILITY_TBL - Facility LOCATION_TBL - Location GRADESCHEME_TBL - Grading Schemes LVL_LD_RULE_TBL - Level/Load Rules PROG_RSN_TBL - Program Action Reasons REPEAT_SCHM_TBL - Repeat Schemes TIME_PERIOD_TBL - Time Periods UNIT_CONVR_TBL - Unit Conversions

PeopleSoft Application	***Control Tables Keyed by Tableset ID***
PeopleSoft Student Financials	ACCT_TYP_TBL_SF - Account Types ACC_AGE_FEE_TBL - Aging Late Fee table ACC_AGING_TBL - Account Aging table ADJ_CODE_TBL - Adjustment Code table ADJ_REASON_TBL - Adjustment Reason table ADJ_TERM_CD_TBL - Adjustment Term Code table ADJ_TERM_TBL - Adjustment Term table AGING_CAT_TBL - Aging Category table AGING_TBL - Aging table APP_FEE_CD_TBL - App Fee Code table APP_FEE_TBL - Application Fee table APP_FEE_TND_TBL - App Fee Tender and Item Types APP_SF_CD_TBL - App Sub-Fee Code table APP_SUBFEE_TBL - App Sub Fee table BANK_ACCT_MTHD - Bank Account Payment Method BI_ACCT_STD_REQ - Accounts for Std Req BI_ACDPROG_STAT - Std Req Academic Prog Status BI_ADMPROG_STAT - Std Req Admissions Prog Status BI_BILL_MSG_TBL - Billing Msg table for SF BI_CAR_STD_REQ - Career for Std Req BI_COM_STD_REQ - Communication Std. Request BI_IVC_FIELDS - Billing Invoice Field table BI_IVC_LAYOUT - Billing Invoice Layout BI_MSG_CAT_TBL - Billing Message Cat table BI_PRINT_RQST - Billing Standard Print Request BI_REQ_MSG - Billing Request Message BI_STD_REQ_GRP - Billing Student Groups BI_STD_REQ_TBL - Billing Standard Request table BI_TERM_STD_REQ - Terms for Std Req BI_TYPE_TBL - Billing Type table

PeopleSoft Application	***Control Tables Keyed by Tableset ID***
	BNK_RCN_INP_LAY - Bank Recon Input File Layout
PeopleSoft Student Financials (cont.)	BNK_RCN_INP_TRN - Bank Transaction Code CALC_CNTL_SESS - Tuition Calc Control Sessions CALC_CNTL_TBL - Tuition Calculation Controls CALC_CNTL_TERM - Tuition Calc Control Terms CALC_ON_REFUND - Calc on Refund Control CLASS_FEE_TBL - Class Fee table CLASS_SBFEE_TBL - Class Sub Fee table CLST_FEE_TBL - Course Fee table CLST_SUBFEE_TBL - Course Sub Fee table CLS_CANCEL_SF - Class Cancellation Code table COLL_LTRITM_TBL - Collection Letter Item table COLL_LTRTMP_TBL - Collection Letter Template table CO_VOID_RSN_TBL - Void Reasons CREDIT_CARD_TYP - Credit Card Type CRSE_FEE_ID_TBL - Course Fee ID table CRSE_FEE_TBL - Course Fee table CRSE_LST_DTL_SF - Course List Detail CRSE_LST_HDR_SF - Course List Header CRSE_RATE_TBL - Course Rate table CRSE_RT_ID_TBL - Course Rate ID table CRSE_SUBFEE_TBL - Course Sub Fee table DEP_DUE_DT_TBL - Deposit Date table DEP_FEE_CD_TBL - Deposit Fee Code table DEP_FEE_TBL - Deposit Fee table DEP_FEE_TRM_TBL - Deposit Fee Term table DISP_ERR_CNTL - Display Error/Warn Control DUE_CODE_TBL - Due Date Code table DUE_DATE_CD_TBL - Due Date Code table DUE_DATE_TBL - Due Date table

PeopleSoft Application	***Control Tables Keyed by Tableset ID***
PeopleSoft Student Financials (cont.)	EG_PROJECT - E&G Operational Projects FEE_CLASS_TBL - Fee Class table FEE_TBL - Fee table FINCODE_TBL - FinCode table GL_INTERFACE - General Ledger Interface GL_INT_CD_TBL - General Ledger Dummy Parent GL_INT_DT_TBL - General Ledger Dummy Parent II GROUP_TYPE_SF - Group Type GROUP_TYPE_TBL - Group Type ITEM_ACCT_TYPE - Valid Account Types ITEM_AGG_TBL - Item Aggregate table ITEM_FA_CD_TBL - Item Type Code table ITEM_GROUP_DTL - Item Type Group Details ITEM_GROUP_TBL - Item Type Group table ITEM_TYPE_1_TBL - Item Type Control table ITEM_TYPE_FISCL - Fiscal Item Type table ITEM_TYPE_FNOTE - Fiscal Item Type Notes table ITEM_TYPE_TBL - Item Type table JRNLGEN_DEFN - Journal Generator Definition LATE_FEE_AGING - Late Fee Aging Category table LATE_FEE_CD_TBL - Late Fee Code table LATE_FEE_LOAD - Late Fee Acad Program table LATE_FEE_PROG - Late Fee Acad Program table LATE_FEE_SCHEME - Late Fee Scheme table LATE_FEE_TBL - Late Fee Setup table LED_FLDS_SF_TBL - ChartFields LED_FLDS_TBL - ChartFields LED_SF_TBL - ChartFields Parent Rec LINE_REASON_TBL - Line Reason table

PeopleSoft Application	***Control Tables Keyed by Tableset ID***
PeopleSoft Student Financials (cont.)	MAX_FEE_ADM_TRM - Max fee for Admit Term MIN_MAX_FEE - Min/Max fee table MIN_MAX_FEE_CAR - Min/Max fee for Acad Career MIN_MAX_FEE_PGM - Min/Max Fee for Acad Program MIN_MAX_FEE_SES - Min/Max Fee for Session MIN_MAX_FEE_TRM - Min/Max Fee for Term MIN_MAX_FEE_YR - Min/Max Fee for Academic Year OPT_FEE_CAR - Optional Fee Careers OPT_FEE_CD_TBL - Optional Fee Codes table OPT_FEE_TBL - Optional Fees table OPT_FEE_TERM - Optional Fee Terms OPT_FEE_TRM_EF - Optional Fee Effdts for a Term OPT_FEE_TRM_LD - Optional Fee Academic Loads OPT_FEE_TRM_VAL - Optional Fee Values for a Term OPT_FEE_VAL - Optional Fee Values ORIGIN_TBL - Group & Deposit Origins PAY_PRIOR_ALL - Payment Priority Overall PMT_CHRG_PRIOR - Payment Charge Priority PMT_CHRG_TBL - Payment Charge Priority table REASON_IN_TBL - SF Reason In REASON_OUT_TBL - SF Reason Out SEC_ITEM_CLS - Item Security - Perm List SEC_ITEM_OPR - Item Security - User Data SEC_SETID_CLS - User ID Access to SetIDs SEC_SETID_OPR - User ID Access to SetID SEL_VALID_FIELD - Selector Group Valid Fields SEL_VALID_RECS - Selector Group Valid Records SEL_VALUE_OLD - Selector Values table SF_ACCT_CLASS - SF Account Class SPEEDTYP_TBL - Speed Types

PeopleSoft Application	***Control Tables Keyed by Tableset ID***
	SPEED_USER_TBL - Work Table for Speed Types
PeopleSoft Student Financials (cont.)	TAX_AUTHORITY - Tax Authority Detail Info TAX_AUTH_HDR - Tax Authority Header Info TAX_CD - Tax Authorities in a Tax Code TAX_HEADER_TBL - Tax Code Header Information TERM_FEE_RES - Term Fee Resident table TERM_FEE_TBL - Term Fee table TERM_FE_CD_TBL - Term Fee Code table TERM_SF_CD_TBL - Term Sub Fee Code table TERM_SUBFEE_TBL - Term Sub Fee table TP_STATUS_TBL - Third-party Contract Status TRANS_FEE_HDR - Transaction Fees Header TRANS_FEE_TBL - Transaction Fees TRANS_FE_CD_TBL - Transaction Fee Codes VALID_RECORD_SF - Valid Records for Selectors VENDOR_SF_TBL - SF to Vendor interface table WAIVER_CODE_TBL - Waiver Code table WAIVER_FORM_TBL - Student Waivers WAIVER_GRP_DTL - Waiver Group Detail table WAIVER_GRP_TBL - Waiver Group table WAIVER_TBL - Waiver table WVR_GRP_CD_TBL - Waiver Group Code table
PeopleSoft Recruiting and Admissions	PSTREEDEFN - PeopleTools table used in the creation of the Region Tree

PeopleSoft Application	***Control Tables Keyed by Tableset ID***
PeopleSoft Financial Aid	AWD_MESSAGE_TBL - Award Messages/Comments BDGT_REGION_TBL - Budget Region table ITEM_TP_FA_DISB - Item Type Disb Plan/Split Cd ITEM_TYPE_FA - Item Type Table SFAG ITEM_TYP_FA_FEE - Item Type Fee table ITM_TP_TERM_LMT - Award Limits by Term Type LN_FEE_TBL - Loan Fee table LN_ITEM_FEE - Loan Item Type Fee table LN_ITEM_TBL - Loan Item Type table RSTRC_AID_ITEM - Restricted Aid IDs/Item Type
PeopleSoft Contributor Relations	AV_ACCOUNT_TBL - Designation Funds AV_INST_TYP_TBL - Designation Types AV_ITEM_TBL - Donor Appreciation Items AV_MBR_CAT_TBL - Membership Categories AV_MBR_TYP_TBL - Membership Types AV_MTVTN_INTV - Appeals linked to Initiative Codes AV_MTVTN_TBL - Appeal Codes AV_ORIG_DNR_TBL - Original Donors to Designation Funds AV_TENDER_TBL - Tender Types AV_TRIB_TBL - Tributes on Designation Funds

Record Groups in Tableset Sharing

A record group is a set of functionally or logically related records or views based on how the records are used in the system. A record group can contain a single record or view, or it can contain many records and views. Record groups are delivered as part of the PeopleSoft system and should not be altered.

When you create a business unit, that business unit is automatically linked to each record group in the system that you are using.

Record groups exist for two purposes:

- To save time in data entry.

  With record groups, tableset sharing can be accomplished quickly and easily instead of requiring redundant data entry.

- To provide consistency in the data.

  Record groups ensure that tableset sharing is applied consistently across all related tables and views in the system.

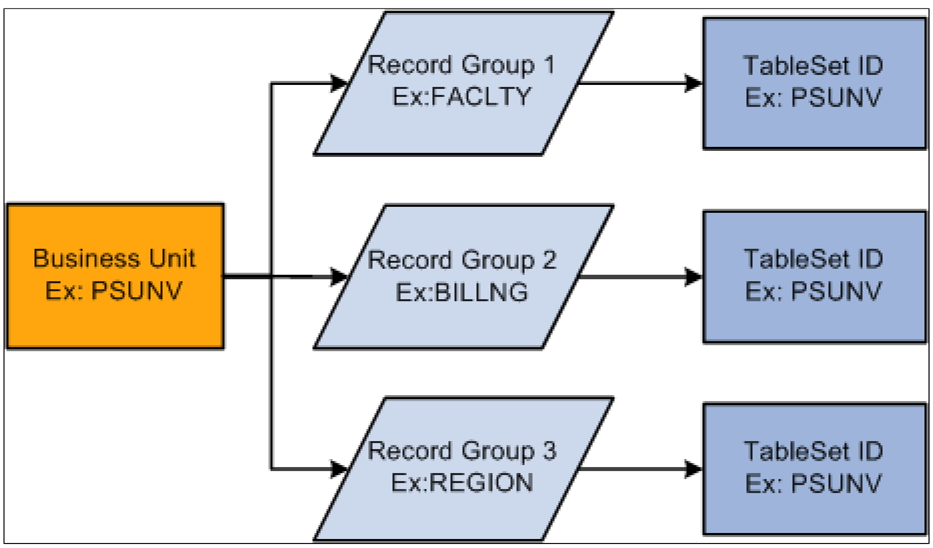
Business Units, Tablesets, and Record Groups

When you create and then save a business unit, a new tableset ID with the same name as the business unit is created. The system automatically assigns that tableset ID to each record group for the new business unit.

Note: PeopleSoft suggests that you create tableset IDs and business unit names that are five characters long. A performance degradation occurs if the tableset IDs or business units have fewer than five characters.

This diagram illustrates the relationship between business unit, record group, and tableset ID:

This example shows how data can pass from a business unit through three record groups and into tableset IDs.



Tableset IDs are the labels that the system uses to identify tablesets. You can have as many tableset IDs as you like, but the more you have, the more complex tableset sharing becomes. You always have the same number of tableset IDs as tablesets.

Warning! You must define at least one complete set of these tables—a tableset—for the Campus Solutions system to function.

Note: You must create at least one tableset ID, even if you are not taking advantage of tableset sharing. Some institutions need only one tableset ID and one business unit.

When you set up the control tables in the system, you'll notice that the tableset ID, or additional primary key, enables the sharing of control table information across business units. If you prefer, you can create a unique set of tables for each new business unit. Either way, tablesets form the building blocks of the system. You populate the individual tables in the tableset according to your particular business rules.

You can also rearrange tablesets by updating tableset assignments for a business unit in the Utilities - TableSet Controls component. A tableset is a group of control table rows identified by the same tableset ID.

You are not required to share all tables in a tableset. With Campus Solutions, you can share any combination of tables with any number of business units, according to your needs. Use the pages in the component to identify, for each business unit, which data is shared and how it is shared.

Tableset sharing can be extremely easy for an organization to design. In fact, it is almost entirely set up by the time you have finished creating the business units.

When defining tableset IDs for Contributor Relations, you must manually create a setID in the tableset ID record, if one does not already exist that matches the Contributor Relations business unit.

Set Control Values

Tablesets are identified by a set control value. The set control value is also a tableset ID. The set control value used to identify a tableset is not the same as the tableset ID that PeopleTools uses to retrieve the data from the tables in the database. Sometimes the set control value is the same as the tableset ID, but other times it is not.

Here is an example of how this works. Suppose that a community college district has three campuses and a main office:

Community College Office and Campuses	***Tableset ID***
Community College Main District Office	CCMDO
North Campus	NORTH
West Campus	WESTC
Far South Campus	SOUTH

Two of the campuses share location and facility information, and all three share the grading scheme and level or load rules. Here are the shared record groups:

Record Group	***Campuses Sharing Record Groups***
FACILITY (Facility table)	North Campus and West Campus
HR_03 (Location table)	North Campus and West Campus
CAREER (Grading Scheme and Level/Load tables)	North Campus, West Campus, and Far South Campus

This table shows how set control values and tableset IDs are used to identify which rows appear in prompt boxes:

Set Control Value	*Record Group*	*Tableset ID*
NORTH	FACILITY	NORTH
	HR_03	NORTH
	CAREER	CCMDO
WESTC	FACILITY	NORTH
	HR_03	NORTH
	CAREER	CCMDO
SOUTH	FACILITY	SOUTH
	HR_03	SOUTH
	CAREER	CCMDO

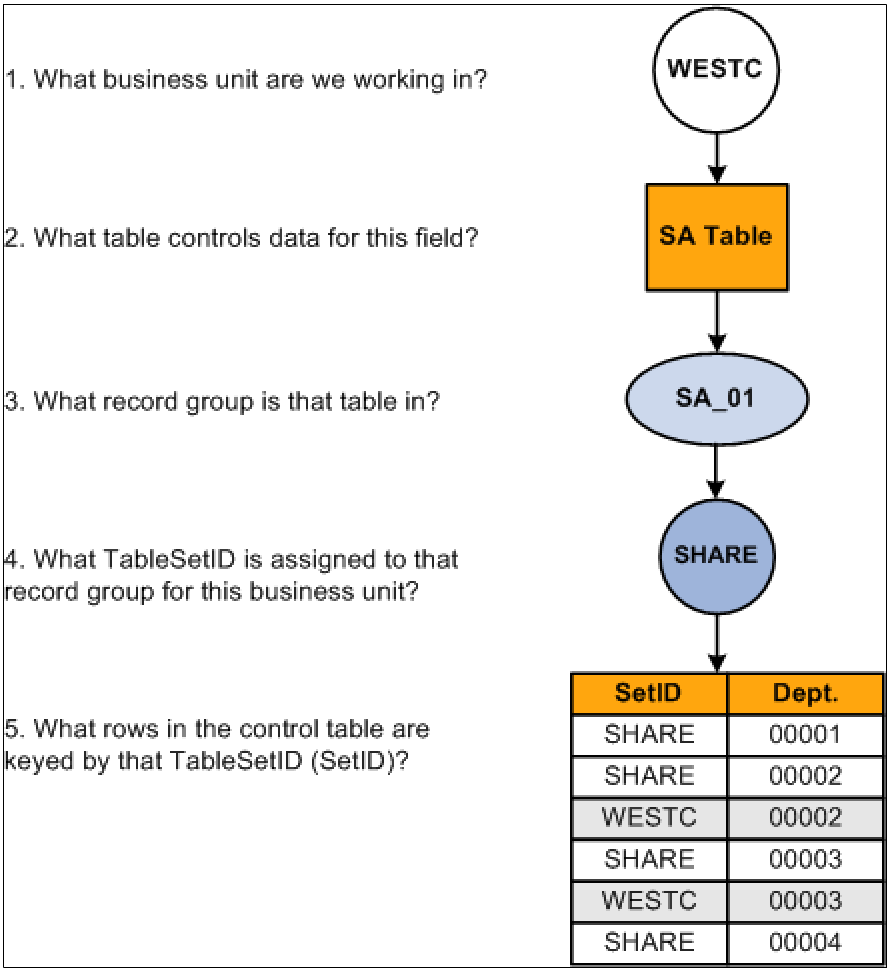
Data Sharing

With tableset sharing, you can specify the control table data that the system uses for each business unit. If much of the control table data is the same from business unit to business unit, tableset sharing enables you to share that information, instead of having to enter the same data multiple times.

To understand how this works in the PeopleSoft system, consider what happens when a user makes a selection from the available options. The list that appears contains all of the valid entries that can be entered in the field based on the relevant business unit.

This series of questions outlines the online process that occurs:

These five questions step users through the tableset sharing process.



Note: Record groups and setIDs for a set control value have a one-to-one relationship.

Selecting a Business Unit Structure

Business units offer a flexible structuring device that you can use to implement each PeopleSoft application based on how the institution is organized. In some institutions, the correspondence between existing structures and the organizational model is obvious. In other cases, it can require careful analysis to determine how to set up the business units so that they reflect the institution and enable you to use the system effectively.

In deciding on the business unit structure for a PeopleSoft application, look closely at the structure in the current system as a starting point. What sort of organizing concepts or categories do you use? Do you still want to use these structures in the PeopleSoft system? To decide where to draw the lines between business units in the institution, you may have to weigh a number of different variables. First, you might consider the question from one perspective, saying, "If I use these criteria, my institution divides into these logical units." Then you might use different criteria and see if the institution divides into different logical units. As you determine at the optimal business unit structure for the institution, keep in mind that in some circumstances you *must* set up multiple business units and in some cases setting up multiple business units is optional.

Note: Multiple business units are not required for Contributor Relations.

Examine the existing codes and IDs and determine how they might relate to PeopleSoft business units. Consider whether you can make a simple mapping of the existing structures onto business units, or whether you should modify the structures based on the flexibility afforded by the PeopleSoft system.

Note: Work closely with your PeopleSoft implementation partner early in the design to determine how best to define business units for the Campus Solutions system.

Implementing Tableset Sharing

This section provides an overview of tableset sharing implementation and discusses how to:

- Create tableset IDs.
- Review record groups.
- Create business units.
- Assign cross-references for business units.
- Adjust tableset sharing for record groups.
- Adjust tableset sharing by using trees.

Understanding Tableset Sharing Implementation

After you have determined how many business units you need and how you want to organize them, you can create them for the Campus Solutions system, and then implement tableset sharing.

You define tableset IDs for the purpose of administering certain control tables, such as the Department table, in a decentralized way. When you define a tableset ID, consider how to categorize a subset of the control table data. If you want to use multiple tableset IDs to set up tableset sharing for the first business unit that you create—before you have created any additional business units—create tableset IDs on the TableSetID page before defining the business unit.

You can create tableset IDs as you set up the business units. If the default setID that you enter creates a new business unit that does not exist, the system automatically creates it; however, you can also create tableset IDs independent of business unit creation by using the TableSetID page.

To define tableset sharing for the organization, you complete the steps for each of these tasks.

To establish tableset sharing, you:

1. Set up business units.
2. Define record groups.

   You can add new record groups.
3. Define tableset IDs for the organization, to reflect the organization's structure.

This step is sometimes optional. It is required, however, for Contributor Relations if a setID matching the Contributor Relations business unit does not exist.

4. Update all of the tableset record group controls.

To link tableset sharing and system defaults to permission lists or business units, you set up Primary Permission List Preference Defaulting options.

See Setting Up Primary Permission List Preferences

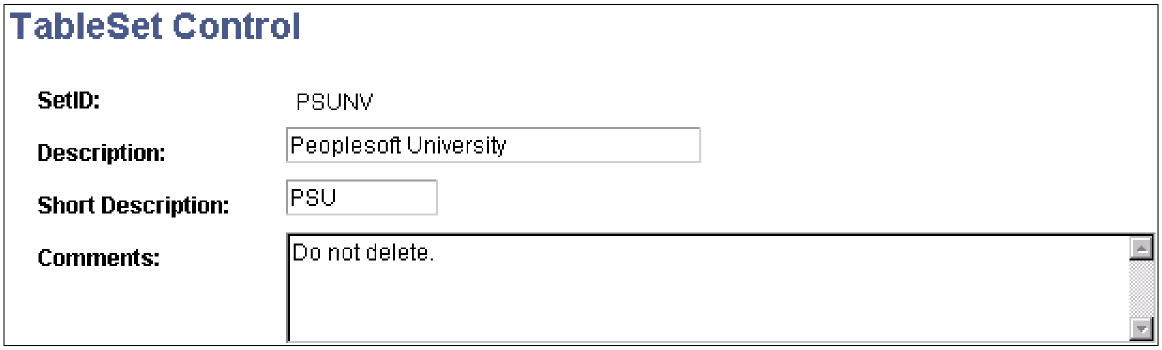
Pages Used to Implement Tableset Sharing

Page Name	***Definition Name***	***Navigation***	***Usage***
TableSetID - TableSet Control	SETID_TABLE	**PeopleTools** > **Utilities** > **Administration** > **TableSetIDs** > **TableSet Control**	Create tableset IDs.
Record Group	REC_GROUP_TABLE	**PeopleTools** > **Utilities** > **Administration** > **Record Group** > **Record Group**	View record groups to see which tables and views are included in each record group in the system. Record groups are predefined for the system.
Business Unit	BUS_UNIT_TBL_HR	**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Business Unit**	Create business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Business Unit** > **Business Unit Reference**	Assign cross-references for business units, to identify business units in other PeopleSoft applications that relate to business units.
TableSet Control - Record Group	SET_CNTRL_TABLE1	**PeopleTools** > **Utilities** > **Administration** > **TableSet Control** > **Record Group**	Adjust tableset sharing for record groups. Tableset sharing is set up as soon as you create business units; however, you adjust tableset sharing by changing the tableset IDs that are assigned to individual record groups.
TableSet Control - Tree	SET_CNTRL_TABLE2	**PeopleTools** > **Utilities** > **Administration** > **TableSet Control** > **Tree**	Adjust tableset sharing by using trees.

Creating Tableset IDs

Access the TableSet ID - TableSet Control page (**PeopleTools** > **Utilities** > **Administration** > **TableSetIDs** > **TableSet Control**).

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



Note: SetIDs should be five characters in length for optimal system performance.

Field or Control	***Description***
SetID	Displays the setID. For clarity, you might create one setID (also known as a tableset ID) that does not match any of the business units, and use that setID to key information that is generic throughout the system. Consequently, the rest of the setIDs match the business units with which they are used.

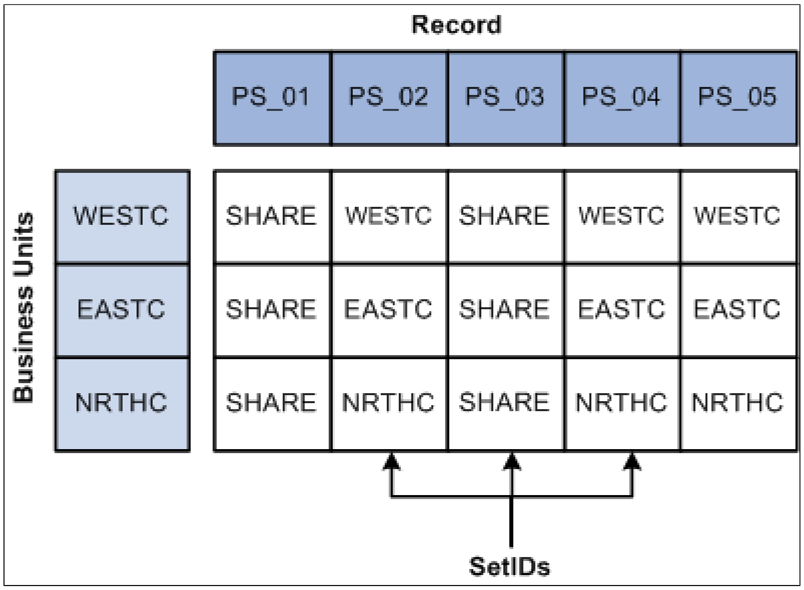
You can create tableset IDs independently or as part of the business unit creation process by using the TableSet ID page. When you add a new business unit to the system, the system automatically specifies a default tableset ID on the Business Unit page that matches the name of the new business unit. If this default tableset ID (with a name matching that of the new business unit) does not already exist, the system automatically creates a new tableset ID with a name that corresponds to the new business unit.

Note: The system creates a tableset ID with the same name as the business unit when you add a new business unit to the system, regardless of whether you choose to use the business unit name as the default setID. Contributor Relations business unit setup does not automatically create a related setID. If you are creating a Contributor Relations business unit that does not already have a matching setID in the tableset ID record, you must create one manually.

To use multiple tableset IDs to set up tableset sharing for the first business unit that you create (before you create any additional business units), create tableset IDs on the TableSet ID page before defining the business unit.

This example illustrates tableset sharing:

A sample tableset ID sharing matrix using three business units and five records



See *PeopleTools: Application Designer Developer's Guide*, "Planning Records, Control Tables and TableSets"

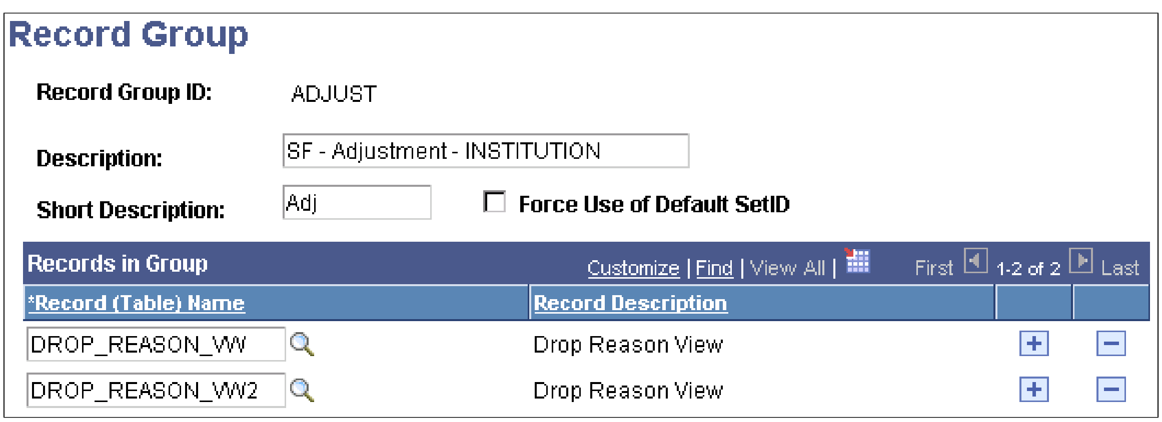
Related Links

Understanding Data Sharing Among Business Units

Reviewing Record Groups

Access the Record Group page (**PeopleTools** > **Utilities** > **Administration** > **Record Group** > **Record Group**).

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



In the record group table, group the record definitions for the tables that you want to share, as well as any dependent record definitions. If you're adding a table to a PeopleSoft application, an appropriate record group may already be defined. But if you are adding new functionality, you may need to add a new record group for the tables that you define.

Warning! Record group definitions and the assignment of the individual tables and views to specific groups are provided to ensure complete and accurate tableset sharing within each functional area. You should not change these record group assignments.

Field or Control	***Description***
Record Group ID	Displays the record group ID. The name that you give the record group ID should be descriptive enough to encompass a category of related tables, not just the table that you are specifically sharing.
Force Use of Default SetID	Select to force the use of the default setID. Set up the default setID on the TableSet Control - Record Group page.

Records in Group

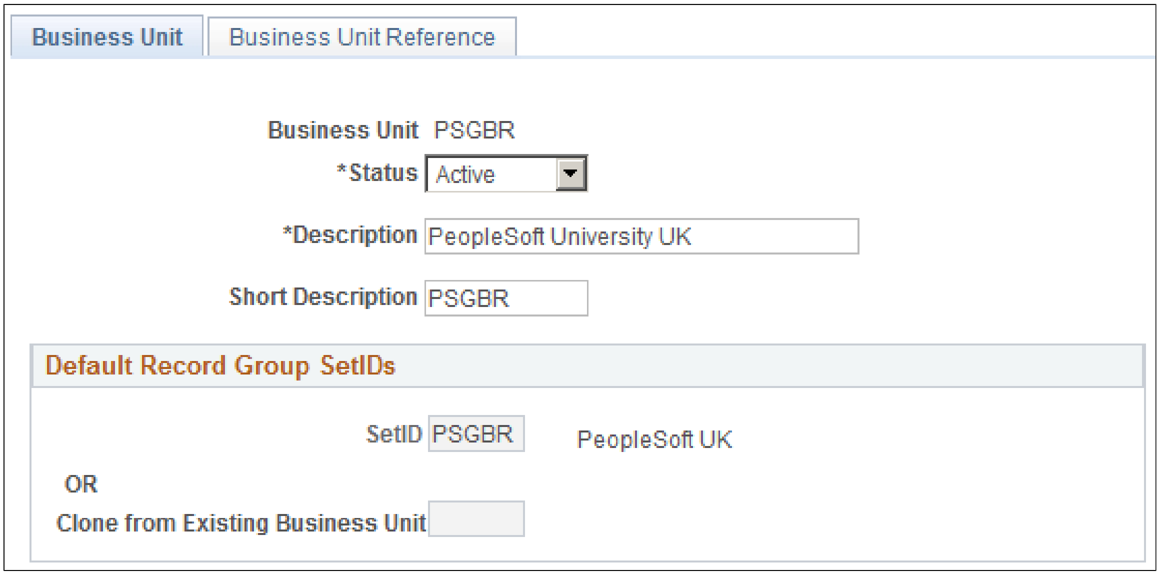
Field or Control	***Description***
Record (Table) Name	Displays the record name of all of the records that are part of the record group ID. Records (tables) are identified by a _TBL extension, and views are identified by a _VW extension. A record group can contain a single table or many tables and views.
Record Description	Displays the description of the associated record (table) name.

Note: When you add a new record group ID, the system automatically adds the new record group ID to all current set control values (business units). The default setID for the new record group ID is based on the default setID for each set control value, as defined for that set control value on the TableSet Control - Record Group page.

Creating Business Units

Access the Business Unit page (**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Business Unit** > **Business Unit**).

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



Warning! For optimal system performance, business units must be five characters. Significant performance degradation occurs if the business units have fewer than five characters.

When you define a business unit, you can specify that the system establish default tableset IDs for the business unit by using the **Default Record Group SetIDs** group box. This indicates to the system which tableset ID is associated with the business unit. The tableset ID determines the preliminary tableset sharing for the business unit by associating the business unit with a record group.

Field or Control	***Description***
Status	Select a status. Business units are not effective-dated, so use this field to implement or retire business units.

Default Record Group SetIDs

Field or Control	***Description***
SetID	Enter an existing tableset ID to be used with the business unit. When you're adding a new business unit to the system, the system automatically populates this field with the same name as the new business unit. For example, if the business unit is called MAINC, then the setID appears by default as *MAINC.* You can override the setID as necessary.

Field or Control	***Description***
Clone from Existing Business Unit	Enter a business unit code. With this feature, you can clone the tableset sharing setup of an existing business unit. When the record groups are linked to the new business unit, the system assigns each record group the same setID that is used for the record group by the business unit that you selected as the clone unit. For example, you can use this field to have the tableset sharing for the new business unit mirror that of another business unit, or to make the two business units similar except for a few record groups. **Note:** When you first access the Business Unit page, the**Clone from Existing Business Unit** option is cleared. To activate the option, clear any setID values from the **SetID** field, and exit the field.

Note: When you save a new business unit for the first time, the system makes the default setID or clone unit unavailable for entry. You cannot change the default record group setID information for this business unit again. This rule prevents you from accidentally overwriting the tableset record group controls for the defined business units.

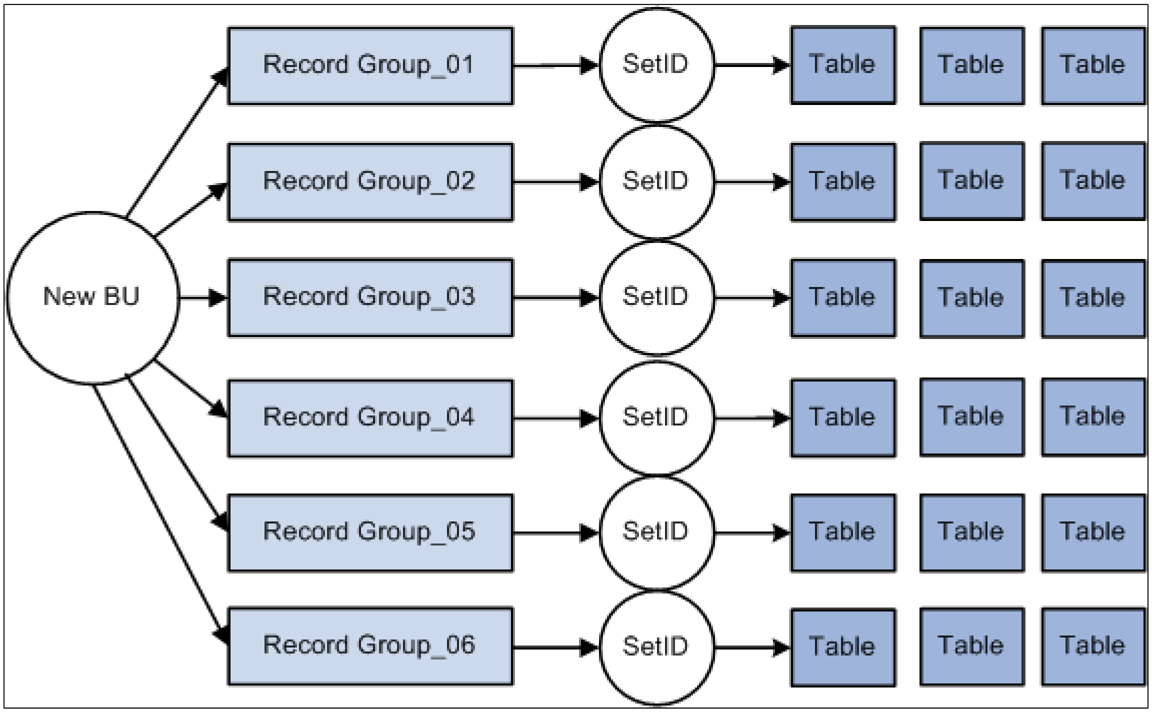
When you add a new business unit and save the page, the system creates all of the appropriate table values provided by PeopleTools that connect the business unit ID, record group ID, and setID.

See “Setting Up Business Units” (Student Financials).

Example of Business Unit and Tableset ID Association

This diagram illustrates how the business unit, record groups, and tableset ID are associated. The business unit and tableset ID can have the same value:

A sample association between a business unit, six record groups, and their corresponding SetIDs.



Assigning Cross-References for Business Units

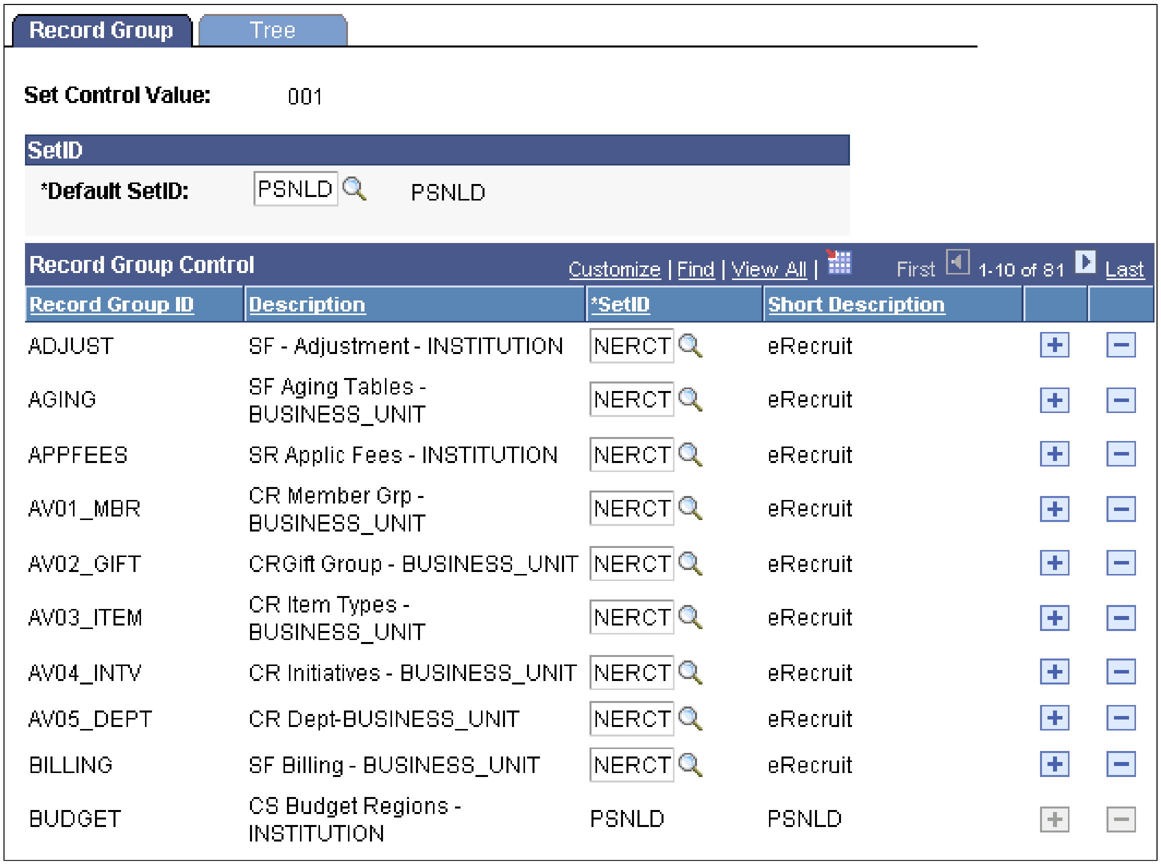
Access the Business Unit Reference page (**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Business Unit** > **Business Unit Reference**).

Indicate the business unit cross-reference, if applicable, for any of the PeopleSoft applications listed on the page. You can identify business units in other PeopleSoft applications that relate to the business unit.

Adjusting Tableset Sharing for Record Groups

Access the TableSet Control - Record Group page (**PeopleTools** > **Utilities** > **Administration** > **TableSet Control** > **Record Group**).

This example illustrates the fields and controls on the TableSet Control - Record Group page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Default SetID	Enter the default setID to use for the set control value. The default setID is the tableset ID that the system uses when you add additional record definition groups to be shared within this tableset. If you have the system require a default setID (by using the Record Group page), then you cannot change the setID for the record group with a setID that is different from the default setID that you indicate here. The setID for that record group ID becomes unavailable for entry. Remember, most record groups contain a number of tables and views. The tableset ID that you assign to that record group *must* represent the information that you want to use from each of the control tables contained in that record group.
SetID	For each record group ID, enter the setID to use.

Adjusting Tableset Sharing by Using Trees

Access the TableSet Control - Tree page (**PeopleTools** > **Utilities** > **Administration** > **TableSet Control** > **Tree**).

Field or Control	***Description***
Default SetID	Displays the default setID assigned to the field value. If you created another tableset for sharing trees, you can change this value.
Tree Name	Enter the tree definitions that are defined with the same set control field.
SetID	Enter the appropriate setID.

Chapter 5

Preparing for Data Conversion

Understanding Data Conversion

Conversion of data from an existing system is one of the most challenging and critical tasks that you accomplish while installing the Campus Solutions system. The conversion task takes preparation and planning, a programming effort, and robust testing.

Because of many factors—amount of data to convert, business practices, institutional schedule—much of the decisions as to when, how much, and even the method of converting historical data is ultimately up to you. The more you convert the better the new system becomes, but the more challenging the conversion task is. This section contains some best practice recommendations for converting data into Campus Solutions; however, the information presented here is not exhaustive.

Consider these tasks:

- Explore Campus Solutions thoroughly before you convert any data.

  Mapping the data to existing fields in PeopleSoft is a step that requires you to know the system in depth. Take advantage of documentation and training available.

- Completely scope the project before starting an implementation and conversion.

  An institution should develop a well-defined scope or implementation plan—including information such as the full extent of the conversion, how much data to convert, and the timing of each phase of data conversion—before starting the project. This plan should have the approval or buy-in of the institution's management team, the project team, and the partners or PeopleSoft consultants with whom you are working.

- Test, test, test.

  It is critical that you test the processes thoroughly in an environment where you can catch errors before you convert the data.

- Plan a conversion schedule.

  Because Campus Solutions is a fully integrated system with multiple applications, it is important to plan which applications are converted in a specific order. You may convert the data any way you want, but this topic suggests how to maximize the system, and hopefully, minimize any challenges you may encounter during conversion.

There are as many ways to plan a conversion as there are universities. So it is a unique process based upon the legacy system, your needs, and how you do business. It is suggested that you:

- Enter go-live dates (or a go-live term) for fall term, not mid-year.

  If you do choose a spring term as the go-live term, you may run into some serious problems. For example, in the case of PeopleSoft Financial Aid, the financial aid cycle starts months before the fall term. The Financial Aid office awards financial aid starting in the March and April time frame for the fall semester. So, timing the implementation drastically impacts the amount of data that needs to be converted as well as the complexity of the conversion process. Work closely with partners, consultants, and account managers to determine the best go-live dates for the institution.

- Convert names, addresses, and personal information first and as early as possible.

  From there you can choose the order of the conversion of each application. It is suggested that you convert PeopleSoft Recruiting and Admissions and Financial Aid, then PeopleSoft Student Records and PeopleSoft Student Financials.

  Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations. See:
  Integrating Person Data
  Integrating Setup Data
  Monitoring Integrations Using the Integrity Utility
  See Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions (Doc ID 2091799.2.

- Enter an effective date that is adequate for your own history.

  This issue can particularly arise in Student Records.

Performing Data Conversion

This section provides overviews of the conversion process and referential integrity and discusses how to:

- Map data for conversion.
- Prepare data for conversion.
- Verify converted data.
- Use data dictionaries.
- Use data load programs.
- Keep systems in sync.
- Estimate disk usage space.

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations. See:
Integrating Person Data
Integrating Setup Data
Monitoring Integrations Using the Integrity Utility
See *Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions* in My Oracle Support (ID 2091799.2).

See *PeopleTools: Data Management*

Understanding the Conversion Process

Here is a review of the scope of the conversion process, so that you can gain an understanding of the phases involved:

- Decide how much data to convert.

  You may choose to convert a different amount of data for each application. For example, you may want to convert 10 years' worth of student records data, two years of admissions data or two years of financial aid data.

- Map data to PeopleSoft data fields.

  To effectively plan a conversion, dig into the old system and identify that one obscure field on that one obscure table and figure out how it maps into the new PeopleSoft system. In some cases, it is difficult, and at times impossible, to map all the codes and tables from the legacy system directly to PeopleSoft tables. In addition, think about the impact that these legacy fields or codes have on reports generated by the PeopleSoft system.

- Export the data, using a Structured Query Report (SQR) or another method to interim tables.

  Use the interim tables to review and clean up the data before moving it to the PeopleSoft system. Corruption of data often is the result of data entry errors. You do not want to move corrupt data from the old system to the new PeopleSoft system.

- Import the data using an SQR.

Understanding Referential Integrity

An important topic to consider and test for as part of the conversion effort is referential integrity. You can convert a lot of data into the correct tables, but the overall system may not have the necessary connections. If you use the normal posting processes in the various applications to convert most of the legacy data, you should not have referential integrity problems because those processes contain many of the necessary referential integrity rules.

An example in Student Financials is third-party contract information. If you link a third party or a transaction to a contract, the contract needs to exist. However, if the conversion neglects to convert contracts, then a referential integrity problem can occur.

Mapping Data for Conversion

When you map data, you are identifying legacy system data and redefining it in Campus Solutions record definitions. This step can be performed while setting the conversion timeline; however, your data mapping efforts will be more focused if the conversion time line has been set.

Issues to consider when mapping data include defining the amount of historical data to be converted, code validation, workflow, reporting, and other processes. The amount of historical data converted may vary across PeopleSoft applications. The complexity of how the legacy system stores history may contribute to less history mapped into the PeopleSoft system. With code validation, valid codes for the institution may have changed over time, and this too must be considered in the conversion effort.

To map data for conversion:

1. Define each legacy data element.
2. Determine if the legacy data element is pertinent to the implementation scope.
3. Map the legacy data element to the Campus Solutions data element.
4. If the legacy data element cannot be mapped directly within your Campus Solutions product line, determine if the legacy data should continue to be tracked.
5. Reformat the legacy data to fit, for example, the Campus Solutions field size, format or data type.

   If certain legacy data cannot be reformatted, indicate those as gaps in the gap analysis.

Spreadsheets are helpful tools when mapping data. At a minimum, these spreadsheets should include the legacy system data source (if data comes from more than one source), the legacy system data element and data type, the specific Campus Solutions or Contributor Relations record, and the specific field and data type in that record. Optional description fields might include related prompt tables, conversion translation values, and legacy system data position.

Another option is to build a mini-application using PeopleTools to map data. You can build Structured Query Language (SQL) views to link various PeopleTools tables together, such as PSRECFIELD and PSRECDEFN, which creates a robust method of identifying field attributes. You can create special reports to identify key fields, required fields, or legacy system data not yet mapped.

Preparing Data for Conversion

After you have identified the legacy data to be converted, you must prepare it for conversion. For example, when coming from the legacy system, data may be packed in EBCDIC format. These fields should be reformatted into a conversion-ready unpacked flat file in ASCII standard format. Usually, a COBOL program is written and run on the database server to create a file placed on the legacy system.

Conversion-ready data does not have to reside in a single file. The program may be designed to create multiple files during the formatting process, with each file only containing data pertinent to a single or related set of Campus Solutions or Contributor Relations destination tables. Smaller file sizes are more manageable and result in faster conversion processing. Also, the data preparation program itself may be broken into multiple programs based on the destination table.

One of the largest time-consuming tasks of the conversion project can be data cleanup. One way to minimize this task is to clean up the data before importing it into the PeopleSoft system. This can be done by using the data preparation and extract program. This program contains more logic to ensure data validity and therefore takes a longer time to program and test, but the program reduces processing time during the data cleanup.

Another option to reduce the data cleanup effort for the conversion team is to create reports for review by appropriate functional experts, technical experts, employees, and managers. These reports can be used for data verification and correction before the data is entered in the database. Correct invalid legacy data before preparing for conversion.

Not all data conversion must occur through background programs. You may determine that online application data entry is necessary for prompt tables and other required PeopleSoft tables for which there was no legacy data.

Verifying Converted Data

After data has been converted to the PeopleSoft system, you must verify the data and check its integrity. Two methods are online verification and batch verification. Data verification must be performed to clean up invalid data that may not have been keyed, required, or validated in the preparation or conversion processes. This process can also identify and clean up duplicates in the legacy system before you finish converting and mapping the data to the new PeopleSoft tables.

You can write batch programs or SQL scripts to check for parent-child relationships and other validation checking. Writing the batch programs requires more time commitment but can quickly check more records.

Online data verification is less exact than the background process, because records are randomly accessed and require a longer amount of time. However, online data entry can be used to enter nonrequired data or supplemental data that was not available from the legacy system.

Using Data Dictionaries

PeopleSoft does not issue a data dictionary as part of its documentation. PeopleTools provides the ability for online documentation of page and field relationships. The development team documents its material as much as is feasible online in PeopleTools. You can write an SQR that provides all the data dictionary information that you need.

Using Data Load Programs

After data preparation, design conversion programs that extract the appropriate file layout, to transfer the legacy data to Campus Solutions tables.

Input Format

Often the input format for the conversion program is the flat file created by the data extract program on the legacy system and transferred—by using File Transfer Protocol—to the database server. Consider loading the data into temporary tables within the PeopleSoft system instead of directly into the "live" tables. By performing this task, you can use the tools already available to you to both clean up and properly convert data. The temporary tables would then be the input for the conversion program.

Conversion Program and Program Language

The conversion program transfers the legacy data from the input format to Campus Solutions tables, including reformatting, validating, and prompt table translating not encompassed in the data preparation programs. The conversion program must include defaults for Campus Solutions record keys and required fields whenever legacy data has no data map.

The two most commonly used languages for conversions are COBOL and SQR. Another option is a specific database management system (DBMS) import utility, if one exists—such as the Oracle SQL Loader. Determinants for making this decision include your skill set. For example, if you already know COBOL, there is no associated learning curve downtime, or increased resources if you use COBOL. Regardless of your skill set, consider if it would be advantageous to learn a language that is likely be used in the future for Campus Solutions modifications, conversion file size, level of translations and edits, and DBMS capability.

Field or Control	Description
COBOL	Has a more robust debugger, can process a larger number of records faster, and is more widely recognized in the industry.
SQR	Is more commonly used in reporting and minor modifications. In most cases, SQR code can be written in less time than COBOL code.
DBMS Import Utility	Requires the least conversion effort but is limited to no application-specific edits or translations.

Table Loading Sequence

Conversion programming may include a single program that incorporates all pertinent tables and their sequence or multiple programs that incorporate single tables or a few related tables. Multiple programs can run simultaneously—increasing efficiency and enabling the allocation of programming responsibility.

Errors and Exception Handling

Regardless of the number of conversion programs, there must be adequate and standard error and exception handling. Reports of database action failures, validation logic failures, and pertinent details help ensure a quality and thorough conversion.

Totals Controls

In addition to errors and exceptions, totals controls also help in quality control. Totals controls include the number of records processed on both the source and destination sides, and dollar tallies whenever possible are pertinent for Financial Aid and Student Financials applications.

Required Fields

You can find out what fields are required for any table or page by searching PeopleSoft Application Designer in PeopleTools. You can also write an SQR to list all required data elements from tables that you want to use in the conversion. It is important that you also read and understand the PeopleCode. There are PeopleCode restrictions within records that can mean that in certain circumstances a field is required or a default value is required. Without understanding the PeopleCode, incorrect data could be entered.

Warning! If a field is not required, do not assume that you do not need to convert data into that field. It is recommended that when in doubt, you review the PeopleCode to determine whether you need data or default values for a particular field.

Note: Refer to individual discussions regarding each application for specific data conversion and data loading tips for applications within Campus Solutions.

Keeping Systems in Sync

Depending on the implementation plan, there are three scenarios for moving data processing from a legacy system to a PeopleSoft system. The first scenario is to cut over everything at once. When all students are fully implemented, you perform a cutover to the PeopleSoft system. Until that point, the legacy system is fully operational. No system synchronization is required.

The second scenario is the mutually exclusive implementation approach. For example, when a student is converted to an application in Campus Solutions, such as Financial Aid, the student is officially taken off of the legacy system's processing in that application. All of the student's other application processing —such as Student Records—is performed on the legacy system. There are two production systems. This approach increases the complexity of joining two data sources for interfaces and reports.

The third scenario is the parallel system approach. An alternative to having two production systems is to test each Campus Solutions application as necessary, but completely delete the application database and rerun a full conversion with the most up-to-date data from the legacy system until full cutover is achieved after full testing. This approach implies that the legacy system is in full use until cutover, but no new programs must be written—for example, the conversion program is reused and all reports continue to be produced from the legacy system. A variance of this approach is to write new data refresh programs that periodically update the various applications with student information entered in the legacy system. This variance provides for more up-to-date information for more accurate reporting and testing, but also implies the additional effort to program the refresh routine. Care must be taken in the refresh routine design to ensure that data in the PeopleSoft system is not duplicated or overlaid by the legacy data.

Estimating Disk Usage Space

For Campus Solutions, PeopleSoft has done some preliminary research on the sizing of a production system. PeopleSoft realizes that the theoretical amount of disk space required by an application is different than the actual amount of disk space required by a database. The difference is due to comparing bytes with database blocks. For instance, if a particular table's average row length is 25 bytes and there are 1,000 rows in the table, theoretically the required amount of space is 25,000. However, if the database block size is 4K (4096), the number of database blocks required to hold the data is seven blocks or 28,673. Therefore, the actual amount of disk space required is greater than the theoretical. With this in mind and realizing that each installation may require a different block size, PeopleSoft states the size in theoretical terms.

For 1,000 student prospects, the amount of space needed for tables and indexes would be 40 megabytes (MB).

For enrollment, PeopleSoft needs to work with a specific, albeit theoretical, scenario. PeopleSoft's scenario was to enroll 1,000 undergraduate students over three terms into four classes per term. In the first term, there are no prerequisites to enroll in any of classes; the second term has one prerequisite for each of the classes; the third term has two prerequisites for each of the classes. During enrollment, the students have no time conflicts and there is no lack of facilities (rooms or seats). The amount of disk space excludes description information stored in long text fields. For 1,000 student enrollments, the amount of space needed for tables and indexes would be 20 MB.

Converting Recruiting and Admissions and Campus Community Data

This section provides an overview of conversion of recruiting and admissions and campus community data and discusses how to populate tables for recruiting and admissions and campus community data.

Understanding Conversion of Recruiting and Admissions and Campus Community Data

You should convert recruiting and admissions data first along with relevant Campus Community data such as personal data—names, addresses, or phone numbers.

It is up to you how much of this data you convert—for instance, how many addresses you convert for one individual—and how much history you take into consideration. Of course, if the student records team is converting 10 years of student records, make sure that there are 10 years of personal data elements in the system.

You should convert up to two years of recruiting and admissions data for your institution. Again, this may vary depending upon your practices and your needs. Regardless of how much history you do convert, it is important that you keep the prospect stacks of data and the Recruiting and Admissions stacks of data consistent. You do not want to end up with a year of recruiting and admissions data without the prospect data for the same year. This also ensures that the data required for institutional research reporting—for instance, cohort reporting and statistical reporting—remains consistent.

Populating Tables for Recruiting and Admissions and Campus Community Data

Aside from address and other information, there are some tables that are precursors to all application conversions in Campus Solutions. These tables represent the minimum to be converted.

Academic Organization Tables

Populate these tables in this order for academic organizations:

- INSTITUTION_TBL
- CAMPUS_TBL
- ACAD_CAR_TBL
- ACAD_ORG_TBL
- SUBJECT_TBL
- ACAD_PROG_TBL
- ACAD_PLAN_TBL
- ACAD_SUBPLAN_TBL

Level and Load and Term and Session Tables

Populate these tables in this order for level and load and term and sessions:

- LEVEL_LD_RULE_TBL
- ACAD_LEVEL_TBL
- ACAD_LOAD_TBL
- TERM_TBL
- TERM_VAL_TBL
- SESSION_TBL
- ACAD_CAL_TBL
- ACAD_CALTRM_TBL
- ACAD_CALSES_TBL

In addition to these tables, you must convert these tables as early in the process as possible in the sequence. Use the name and address load routines delivered with the system, to load data:

- PERSON.
- PERS_DATA_EFFDT.
- PER_POI_TYPE.
- PERSONAL_DATA.
- DISABILITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- DIVERSITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- NAMES.
- ADDRESSES: to display and convert any address information, including those on PERSONAL_DATA.
- ADM_PRSPCT_CAR.
- STDNT_CAREER.
- ADM_APPL_DATA.
- ADM_APPL_PROG.
- GENL_MATERIALS: to track materials already received for applications.
- EXT_ORG_TBL.

Converting Financial Aid Data

This section provides an overview of conversion of financial aid data and discusses how to populate tables for financial aid.

Understanding Conversion of Financial Aid Data

This section lists prerequisites and discusses conversion of financial aid data.

Prerequisites

Before you can convert financial aid data, personal data for each financial aid record must already be converted. In addition, financial aid data should be converted prior to student financials data, because posting of financial aid in Student Financials is dependent upon the disbursements in Financial Aid.

You must define item types before you begin conversion of financial aid data. You must decide whether financial aid or student financials has ownership of the PeopleSoft Item Types table.

Conversion of Financial Aid Data

You should convert up to two years of financial aid data for schools, and as much aggregate data as possible, because it has lifetime loan limit information. Ultimately, it is up to you how much data you convert. You may decide to keep the legacy system up until fall of the conversion year to close out Pell Payment and FISAP reporting.

Note: Please refer to the Department of Education's requirements for maintaining financial aid records to assist you in deciding how much legacy data to convert to the PeopleSoft system.

Related Links

Converting Student Financials Data

Populating Tables for Financial Aid

At a minimum for Financial Aid, convert the aggregate data for these tables:

- STDNT_AGGR_LIFE
- STDNT_AGGR_ALL
- STDNT_AGGR_SCHL

You may want to convert additional data depending on what you have in the current system:

- Automatic packaging.
- ISIR data.
- Student budget information.
- Years of award activity.

- Loan history.
- Work-study history.
- Checklists for documents already received.

Converting Student Records Data

You enter data in Student Records tables by academic program. How much history data you convert is up to you.

This section lists prerequisites and discusses how to:

- Populate tables for student records.
- Convert enrollment data.

Related Links

Converting Recruiting and Admissions and Campus Community Data

Prerequisites

Some of the tables, as noted in the Converting Recruiting and Admissions and Campus Community Data section, must be loaded before you load the student records data.

Populating Tables for Student Records

At a minimum for Student Records, set up these tables in the sequence they are listed.

For the course catalog and schedule of classes, there is PeopleCode behind the COURSE_ID field to increment a new course ID by 1. To mimic what this PeopleCode does, the conversion program needs to do the +1 logic. You can manually set the next available course ID in the installation table for Campus Solutions. You should update the last course ID assigned in the Installation table, so that you do not have collisions between the course IDs assigned by the conversion and course IDs manually created later.

In addition to the conversion program you write to create the catalog, you should set the Status field on the Catalog Data page to *Active* so that the course is active as soon as you run the conversion program to create the record.

Course Catalog Tables

Populate these tables for the course catalog:

- CRSE_CATALOG
- CRSE_COMPONENT
- CRSE_OFFER

Schedule of Classes Tables

Populate these tables for the schedule of classes:

- CLASS_TBL
- CLASS_ASSOC
- CLASS_COMPONENT

Student Careers and Plans

Populate these tables for student careers and plans:

- STDNT_CAREER
- STDNT_CAR_SEQ
- ACAD_PROG
- ACAD_PLAN

Student Degrees

Populate these tables for student degrees:

- DEGREE_TBL: populate this table manually.
- ACAD_DEGREE.
- ACAD_DEGR_HON.
- ACAD_DEGR_PLAN.
- ACAD_DEGR_SPLN.

Grades

Populate these tables manually for grades:

- GRADING_SCHEME_TBL
- GRADE_BASIS_TBL
- GRADE_TBL

Student Term Data

Populate these tables for student term data:

- STDNT_CAR_TERM
- ENRL_REQ_HEADER
- ENRL_REQ_DETAIL

Related Links

Selecting General Installation Options

“Creating Course Offerings” (Student Records)

Converting Enrollment Data

There are three options to select for converting student enrollment data. Note that when you convert enrollment data you must create enrollment request input transactions and engage the enrollment COBOL engine to actually post the enrollments. This is the only way that the statistics on the STDNT_CAR_TERM table are automatically calculated.

Options for converting enrollment data are:

1. Convert the data as normal student enrollment data.

   This is the recommended option. The course catalog and schedule of classes must be converted first, and you must have data for these as far back as you want to have enrollment data. The conversion program must create class association groups for the offerings when you convert the schedule of classes. In addition, a student career term must be present for every past term that you intend to convert. For each class section that you convert historically, you need an entry in the CLASS_TBL. This does not mean that you must convert all of the class sections, just the sections that are graded. Even for graded sections the amount of data needed is minimal. For example, you may choose not to convert meeting times and instructors for classes. You may want to have the conversion programs roll all enrollments for a course in a term into one section. For example, if English 101 had 51 sections in fall 1996, you could create a Section 1 for that term and convert all 51 sections into that Section 1.

2. Convert enrollment data as internal transfer credit or other credit.

   This option is necessary if you have only your course catalog but not your class schedule for as far back as you want to convert data. This method can make transcript printing a challenge, because past credits prior to conversion appear as transfer credit. Having split transcripts may also be an option, if issuing two transcripts for a student is acceptable—one from the old system for prior work and one from the new Campus Solutions system for all work after you bring the system up. In this case, you would still want to convert the enrollment data by summary transfer credit, so that the prior system's term academic statistics roll into Campus Solutions.

3. Use the Historical Course Enrollment page **(Manage Student Records > Manage Academic Records > Use > Historical Course Enrollment)** and convert statistics in summary by using the transfer credit engine.

   If you cannot go through the effort to convert prior enrollment history, or the data is not available to you electronically to reconstruct prior course catalog and schedule of classes data, use the Historical Course Enrollment page. Create an SQR or other program to directly load enrollment data onto the Historical Course Enrollment page, and manually clean up this data. If you select this option, convert summary statistics by using the transfer credit COBOL process.

Related Links

“Creating Historical Enrollment Records” (Student Records)

Converting Student Financials Data

This section lists prerequisites and discusses how to populate tables for student financials.

Prerequisites

Student Financials receives data from many of the other Campus Solutions applications. For this reason, you must set up parts of other applications before you can convert the student financials information.

You must convert personal data tables and external organizations data before you convert student financials data.

Related Links

Converting Recruiting and Admissions and Campus Community Data

Populating Tables for Student Financials

This list presents information about populating the tables related to Student Financials:

- General Ledger (GL).

  Make sure that the GL information is set up on the Item Type table. You can convert the data and run a GL interface to set the GL fields, or you can convert the fields as having already been sent to the GL.

- Financial Aid.

  Another important consideration in the sequencing of the student financials conversion is processing financial aid. If you are thinking about going live with financial aid and its disbursements at mid-year, consider the effect on the coordination of disbursing financial aid and the balance of the student's account for the year. For example, the disbursed fields in Financial Aid should be in sync with the amounts in Student Financials, if automated disbursement is to take place for that particular term. In addition, anticipated aid is used in numerous processes in Student Financials. Therefore, an important consideration is the conversion of anticipated aid for current processing cycles, as conversion or lack of conversion affects student financials processes. You should ensure that conversion is for fall term, rather than for mid-year, for these reasons.

- Payment Plans.

  Third-party processing and payment plans are also an important conversion issue for student financials. To take advantage of Student Financials processing for payment plans and third-party processing, ensure that the conversion of this data occurs and that separate accounts are created for the various contracts that you have established for student sponsorship or extended payment options.

- Posting.

  The major focus of the conversion effort for student financials is getting all of the old account and transaction information into the new system. The primary vehicle for converting the information is posting. It is possible to directly update the processing tables with data from the legacy system. However, it is much safer and cleaner to use the posting process to convert the legacy data. This is not to say that you do not need to update the information after posting. Using the posting process gives you cleaner data and provides a base upon which you can edit the information.

Create groups and use the group posting process to get the information on the system. Update other information as needed. The group posting process enables you to break down and track student populations and time categories into meaningful groups that you can edit and correct. Possible group scenarios might be academic—that is, for example, convert all medical school students, dental students, veterinary students. Another possible categorization is using time-based groups. You may want to break the student population into groups by term.

However you break down the groups, plan the data mapping carefully between the group posting tables and the current legacy data. Run several trials of posting groups and test the system to see if it processes correctly from adjusting tuition, adjusting financial aid disbursements, and producing a bill.

- Tuition Charges.

  If you are planning to use the tuition calculation process to convert tuition charges for prior terms, you have two options. You can either convert and post all the information from prior terms, or you can skip the tuition charges and use the tuition calculation process for prior terms as the method for converting the data. The former option does not require the conversion of academic data from prior terms; the latter does require that correct academic data be converted prior to the student financial data.

Converting Contributor Relations Data

This section lists prerequisites and discusses how to:

- Populate tables for Contributor Relations.
- Create accumulated records for gift and pledge inquiry.

Prerequisites

Contributor Relations uses data from some of the other Campus Solutions applications. For this reason, you must set up Student Financials item types and related general ledger information as well as departments before you can convert some of the contributor relations information.

Populating Tables for Contributor Relations

At a minimum for Contributor Relations, set up these tables.

Organization Structure Tables

Populate these tables for organization structure:

- INSTITUTION_TBL
- CAMPUS_TBL
- DEPARTMENT_TBL

- AV_BUS_UNIT_TBL

Campus Community and Constituent Tables

Populate these tables for Campus Community and constituent data:

- PERSONAL_DATA.
- PERS_DATA_EFFDT.
- PERS_NAME_TYPE.
- DISABILITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- DIVERSITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- NAMES.
- ADDRESS_TYPE.
- ADDRESSES: to display or convert any address information, including that on PERSONAL_DATA.
- EXT_ORG_TBL.
- AV_CNST_TYP_TBL.
- AV_LEGACY_DEG: to convert alumni degree records if you do not want to create all previously existing academic structures in the student records tables.

  Otherwise, all of the Student Careers and Plans and Student Degrees tables listed in the Converting Student Records Data section are required for tracking academic data.

Note: The EXT_ORG_ID field should be left blank for PeopleSoft data. This field is used to store data for external organizations. When dealing with an organization, you would leave EMPLID blank and load the EXT_ORG_ID for the organization.

Gift Tables

Populate these tables for gifts:

- AV_SESSION_TBL: required.
- AV_BTCH_TOT: required.
- AV_GIFT_DTL: required.
- AV_DESIGNATION: required.
- AV_RECOGNITION: required.
- AV_RCG_DES: required.
- AV_MTCH_GIFT: optional.
- AV_TRIBUTE_DTL: optional (In Honor Of or In Memory Of).

- AV_TRIBUTE_NTFY: optional.

Pledge Tables

Populate these tables for pledge data:

- AV_SESSION_TBL: required.
- AV_BTCH_TOT: required.
- AV_PLEDGE_DTL: required.
- AV_DESIGNATION: required.
- AV_RECOGNITION: required.
- AV_RCG_DES: required.
- AV_PLDG_SCHD: required for active pledges but optional for complete pledges.
- AV_TRIBUTE_DTL: optional (In Honor Of or In Memory Of).
- AV_TRIBUTE_NTFY: optional.
- AV_SESSION_TBL.

  Populate all key fields, plus all other fields you can populate. The SESS_STATUS = O for trial runs but should ultimately be set to P for posted. The user ID is important here as it dictates security. (They can all have the same user ID, such as PS.) The ACKN_FLG field should be set to Y.

- AV_GIFT_DTL.

  Populate all key fields, plus all other fields you can populate. The FISCAL_YEAR (CCYY) should be populated. The SESSION_NO should start with one and increment by one for every group of 100 records, if the organization chooses to abide by the recommendation of 100 records per session. The SEQ_NO should be 1 for historical data, provided these are all just gifts and not adjustments. The sequence is one for the original gift and increments (by two within the AV_GIFT_DTL table —for example 1, 3, and 5), with each adjustment made to the original gift. The SEQ_NO in the AV_ADJ_GIFT_DTL table increments with even numbers by two to indicate the offsetting record to the related AV_GIFT_DTL record. The ACKN_FLG field should be set to Y.

  Note: If you don't want historical gifts to get an acknowledgement, then set the AV_SESSION_TBL. ACKN_FLG field to Y.

- AV_DESIGNATION.

  Populate all key fields, plus all other fields you can populate. This is not a setup table, but an allocation of the gift detail record to one or more designations.

  Note: Amounts can default to the gift amount if there is only one designation or recognition per gift. If there is more than one designation or recognition per gift, then the amount fields need to be populated with actual amounts or percentages.

- AV_RECOGNITION.

Populate all key fields, plus all other fields that you can populate. RCG_PCT_AMT and RCG_APPLIED should be mapped to gift amount (if there is only one recognition per gift). The RECOGNITION_TYPE = H for hard credit. For soft credit, there are different types (such as vehicle credit) that are defined by the institution. No soft credit Values are: delivered. RECOGNITION_TYPE is a setup value, with H being a delivered, required value.

- AV_RCG_DES.

  Populate all key fields, plus all other fields that you can populate. RCG_DES_AMT and CHARITABLE_AMT should be mapped to gift amount (if there is only one recognition or designation per gift). For Soft Credit CHARITABLE_AMT = 0.

Note: For converted active pledges to have pledge payments made against them, the AV_SESSION_TBL.SESS_STATUS field for the pledge session must be set to P.

Creating Accumulated Records for Gift and Pledge Inquiry

In Contributor Relations, the system runs Giving Profile and Commitment Summary online reports based on summary accumulator records rather than detailed transaction records. For the proper information to appear on these reports, you must initialize the summary accumulator records for all constituents and all gifts and pledges in the system. Contributor Relations delivers a Constituent Accumulator Initialization Application Engine process (AV_ACC) to perform this task. To access the process, select **Set Up SACR** > **Product Related** > **Contributor Relations** > **Install Contributor Relations** > **Initialize CR** > **Accumulator Initialization.** When initialized, incremental accumulations take place for affected constituents during the Constituent Accumulator process. You can run this process either by itself or along with the GL Interface job.

The Constituent Accumulator Initialization process is a resource-intensive process that requires an extended background processing window. The process deletes and recalculates all data from the accumulator records (PS_AV_CNST_ACC, PS_AV_CNST_ACC_DES, and PS_AV_CNST_ACC_FY). If all transactions contained within in-process sessions are first completed (their session status changes to *Posted*), do not select the **Search for unposted Pledge Payments** and **Search for unposted Matching Gifts** options. This improves the performance of the initialization process.

Note: If you do not complete the initialization process, the system does not complete the information displayed online on the Giving Profile and Commitment Summary pages.

If additional groups of constituents are required to allow the process to complete within the particular background processing window, the records in the PS_AV_ACCUM_INIT table can be modified to include more, smaller groups. Remember, however, that additional occurrences of the temporary tables used by the AV_ACC Application Engine process are required if you run more than the delivered five processes at any one time.

Related Links

Setting User Defaults

Chapter 6

Reviewing Installation Setup and System Defaults

Understanding Installation Setup and System Defaults

There are several settings on the system's installation pages that you should review before setting up any of the Campus Solutions applications. Specifically, you should review settings that point the system to the applications that you have installed, settings that begin and maintain incremental numbering, and settings that define basic default values throughout the system. It is a good idea to review the country codes and country address formats defined on the installation pages, too. If any of these settings are not correct or do not reflect the institution's design decisions, you could experience problems getting the system to operate properly.

Selecting General Installation Options

To set up general installation options, use the Installation Table component (INSTALLATION_TBL).

This section discusses how to:

- Select installed applications.
- Select installation settings and defaults.
- Select General Ledger installation options.

For each site where you implement Campus Solutions, you must complete the Installation Table to specify various defaults, processing rules, and counters for the system to use. You can have only one set of installation information for each site; this information is required.

If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations.

See:

- Integrating Person Data
- Integrating Setup Data
- Monitoring Integrations Using the Integrity Utility
- *Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions* in My Oracle Support (ID 2091799.2).

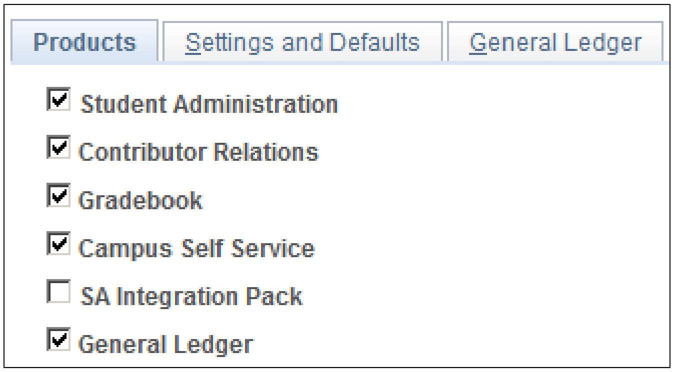
Pages Used to Select General Installation Options

Page Name	***Definition Name***	***Navigation***	***Usage***
Products	INSTALLATION_TBL1	**Set Up Common Objects** > **Install** > **Installation Table** > **Products**	Select which PeopleSoft applications and application parameters are installed on the system. Ensure that the settings on this page are accurate before using the Campus Solutions system.
Settings and Defaults	INSTALLATION_TBL1B	**Set Up Common Objects** > **Install** > **Installation Table** > **Settings and Defaults**	Select installation settings and defaults including country-specific installation information.
General Ledger	INSTALLATION_TBLGL	**Set Up Common Objects** > **Install** > **Installation Table** > **General Ledger**	Select General Ledger installation options.
Alternate Character	ALT_CHAR_TBL	**Set Up Common Objects** > **Install** > **Installation Table** > **Alternate Character**	Specify the language code and character type. For information, see PeopleSoft HCM: Application Fundamentals: Setting Up and Working with Languages, Working with Alternate Character Sets.
Regional Transactions	SETUP_HRMS.INSTALLATION_TBL.GBL	**Set Up Common Objects** > **Install** > **Regional Transactions**	Use the Regional Transactions - Regions in Transaction page to define the regulatory regions that make up a regulatory transaction type.

Selecting Installed Applications

Access the Products page (**Set Up Common Objects** > **Install** > **Installation Table** > **Products**).

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

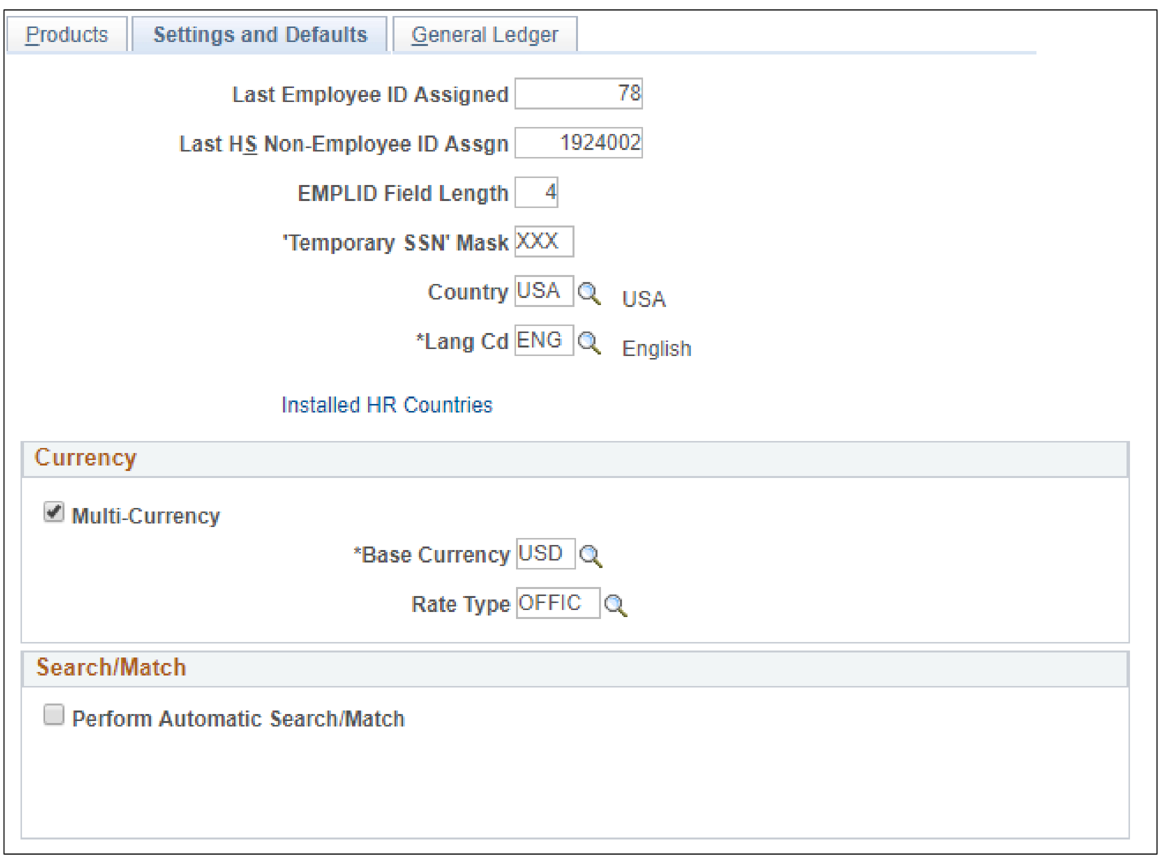


For information about installing General Ledger, see “Setting Up Installation Parameters and Keywords” (Student Financials).

Selecting Installation Settings and Defaults

Access the Settings and Defaults page (**Set Up Common Objects** > **Install** > **Installation Table** > **Settings and Defaults**).

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



Field or Control	***Description***
Last Employee ID Assigned	Enter the next ID number that you want the system to assign, for both people and organizations, when the system automatically generates IDs.
Last HS Non-Employee ID Assgn	Enter the next ID number that you want to system to assign for Physicians when the system automatically generates IDs. See "Setting Up Physicians" (Campus Community Fundamentals).
EMPLID Field Length	Define the length of all new IDs created in the system for both people and organizations. The default value is *4* characters but can be changed to a maximum of 11. This value is used to calculate the number of zeros that precede an ID when the system automatically generates a new ID. For example, using the default length of *4,* a system-generated ID or organization ID would be 0001, 0002, 0003, and so on. When ID 9999 is generated, the system no longer inserts preceding zeros before the ID number. The next system-generated ID is 10000.
'Temporary SSN' Mask (temporary Social Security number mask)	Enter a three-digit number to be a default Social Security number for all applicants or people whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number does not conflict with valid Social Security numbers.
Country	Select a country for the system to enter as a default value.
Lang CD	The system displays the default base language for the database.
Installed HR Countries	Click the **Installed HR Countries** link to access the Installed HR Countries page, where you can set up which country-specific regions you want displayed on the **Regional** tab in the **Add/Update a Person** page. For more information, see *PeopleSoft HCM: Application Fundamentals*.

Currency

Field or Control	***Description***
Multi-Currency	**Note:** Select the Multi-Currency check box on the PeopleTools Options page (PSOPTIONS). See *PeopleTools: System and Server Administration*, "Using Administration Utilities."
Base Currency	Select a currency code from the values in the Currency Code page (CURRENCY_CD_TABLE).
Rate Type	Identify the default rate type on which your currency conversion is based.

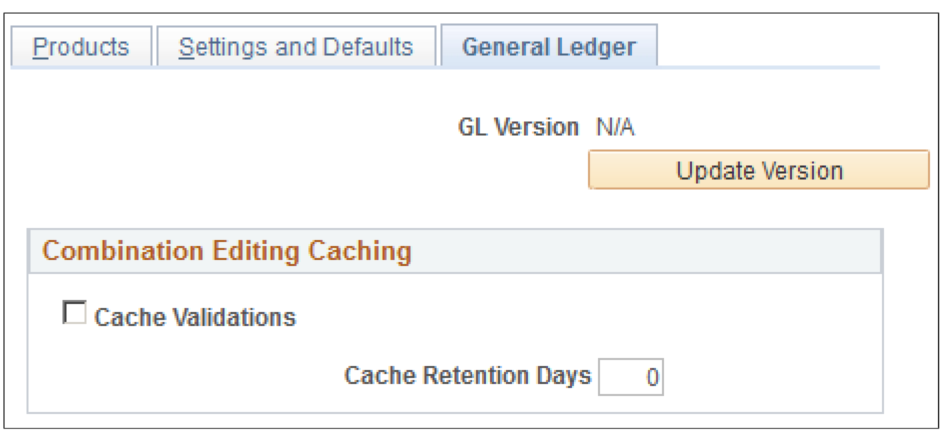
Search/Match

Field or Control	***Description***
Perform Automatic Search Match	Select to perform an automatic search and match when you create a new ID. The system will search the database to determine that you are not entering a duplicate record. See: "Understanding Search/Match" (Campus Community Fundamentals)

Selecting General Ledger Installation Options

Access the General Ledger page (**Set Up Common Objects** > **Install** > **Installation Table** > **General Ledger**).

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



Field or Control	*Description*
GL Version	Displays the version of PeopleSoft General Ledger that is interfacing with Campus Solutions. Click the Update Version button if you change versions. The system will automatically update the GL Version. **Note:** Full ChartField functionality is available only when you use PeopleSoft General Ledger 8.4 or higher.
Update Version	Click to test the integration with PeopleSoft Financials and display the latest version of Financials

Combination Editing Caching

Field or Control	*Description*
Cache Validations	Select to cache the results of your validations. This improves performance.
Cache Retention Days	Enter the number of days to store validation results. The system will delete anything in the cache older than this.

Selecting Student Administration Installation Options

To set up installation options, use the Student Admin Installation component (INSTALLATION_SA).

This section discusses how to:

- Set up incremental numbering.
- Select country-specific features and enable CRM for Higher Education feature.

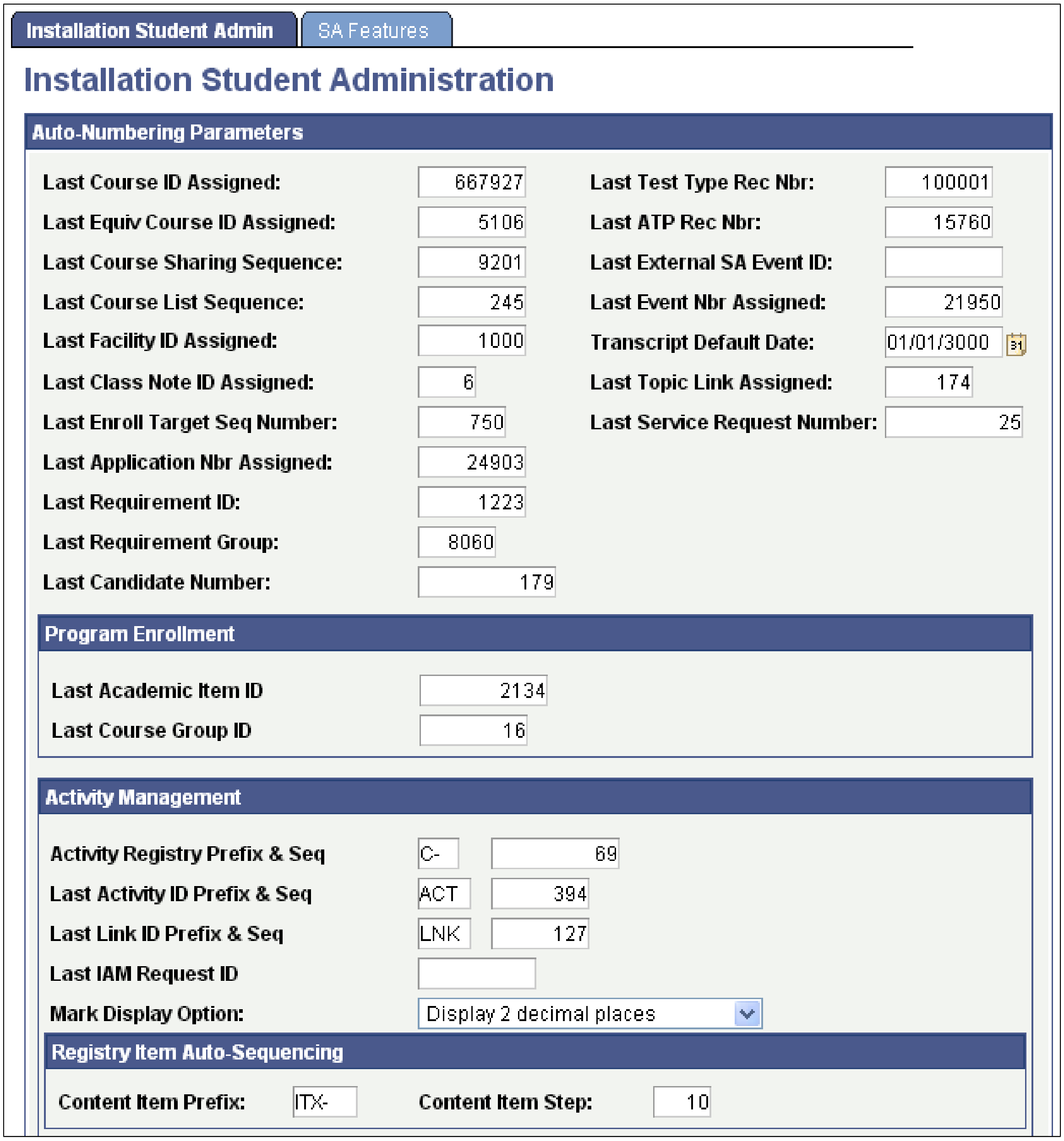
Pages Used to Select Student Administration Installation Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Student Admin (Installation Student Administration)	INSTALLATION_SA	**Set Up SACR** > **Install** > **Student Admin Installation** > **Installation Student Admin**	Set up or review incremental numbering for items throughout the system. Enable anonymous grading.
SA Features	SCC_INSTALL_SA2	**Set Up SACR** > **Install** > **Student Admin Installation** > **SA Features**	Turn on country-specific features. Enable the CRM for Higher Education feature.

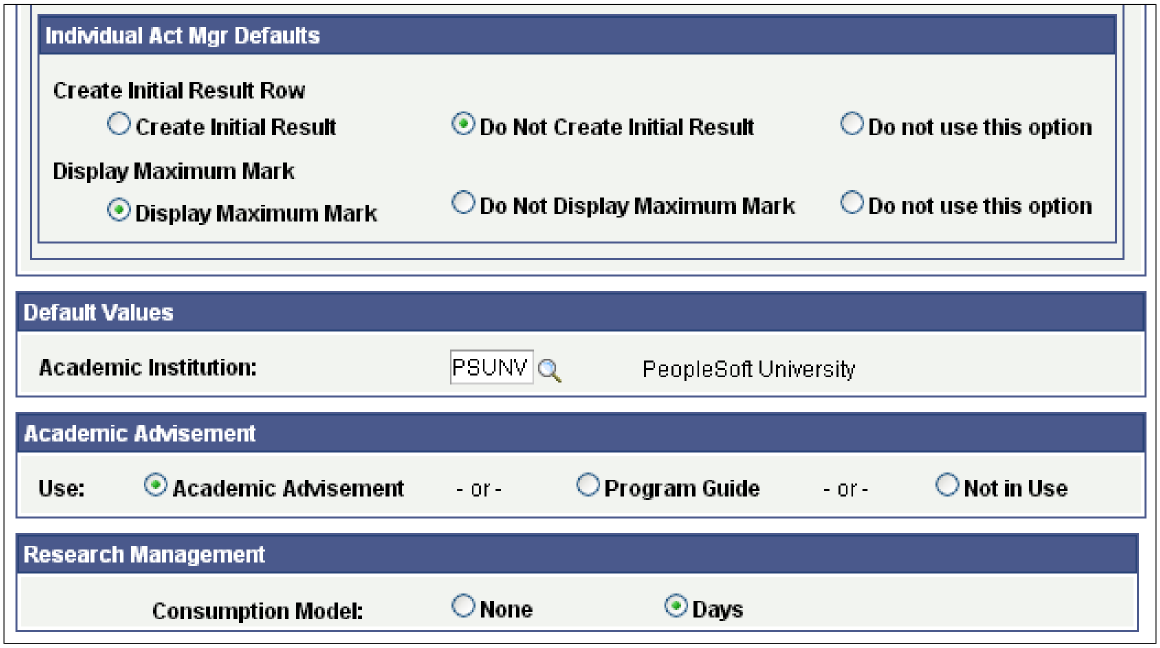
Setting Up Student Administration Options

Access the Installation Student Admin page (**Set Up SACR** > **Install** > **Student Admin Installation** > **Installation Student Admin**).

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



Auto-Numbering Parameters

Each field on this page is automatically incremented or automatically appears by default throughout the system. Set the last used numbers so that automatic numbering does not create numbers that already exist in the data.

If you want the increments of any of these fields to start at a number other than zero, enter that number on this page before you do anything else in the system.

Note: After you have begun converting or entering data and running processes, you can access this page to determine the last number that was incremented for each of the fields listed, but you should *not* change the numbers.

Field or Control	*Description*
Last Course ID Assigned	Displays the last course ID assigned. Used by PeopleSoft Student Records.
Last Equiv Course ID Assigned (last equivalent course ID assigned)	Displays the last equivalent course ID assigned. Used by Student Records.
Last Course Sharing Sequence	Displays the last course sharing sequence. Used by PeopleSoft Academic Advisement.

Field or Control	*Description*
Last Course List Sequence	Displays the number of the last course list created. Used by Student Records for enrollment requirements; also used by Academic Advisement for regular academic advisement course lists and for Program Guide course lists.
Last Facility ID Assigned	Displays the last facility ID assigned. Use to enable the system to display by default an automatically incremented facility ID number each time that you create a new facility on the Facility Table setup page. If you do *not* want to use auto incremental numbering, you are required to enter a value for Facility ID when adding a new facility. Used by various applications.
Last Class Note ID Assigned	Displays the last class note ID assigned. Used by Student Records.
Last Enroll Target Seq Number (last enrollment target sequence number)	Displays the last enrollment target sequence number. Used by Student Records and Recruiting and Admissions for Enrollment Management Enrollment Targets.
Last Application Nbr Assigned (last application number assigned)	Displays the last application number assigned. Used by Recruiting and Admissions.
Last Requirement ID	Displays the number of the last requirement ID created. Used by Student Records for enrollment requirements; also used by Academic Advisement for regular academic advisement requirements and for Program Guide requirements.
Last Requirement Group	Displays the last requirement group. Used by Student Records for enrollment requirement groups; also used by Academic Advisement for academic requirement groups, including Program Guide requirement groups.
Last Candidate Number	This field is used in the candidate number generation process. When assigning a new candidate number, the system takes the current value and adds 1, then updates the field with the last calculated number. See "Setting Up Research Tracking" (Student Records)
Last Test Type Rec Nbr (last test type record number)	Displays the last test type record number. Used in processing suspense records for data loads. Used by Recruiting and Admissions.

Field or Control	***Description***
Last ATP Rec Nbr (last admissions testing program record number)	Displays the last ATP record number. If you enter *50,000* in this field, the next time that you run the ATP data load SQR process (CCATPLOD), each school loaded has a number assigned starting from 50,000. This field is not connected to the institution's unique ATP code. Used by Campus Community and Recruiting and Admissions.
Last External SA Event ID (last external student administration event ID)	Displays the last external student administration event ID. Used by various applications, including Contributor Relations.
Last Event Nbr Assigned (last event number assigned)	Displays the last event number assigned. Used by various applications, including Contributor Relations.
Transcript Default Date	Displays the transcript default date. This is the default date used for processing academic advisement degree audit reports. To set the default to the current date, leave this field blank. Used by Academic Advisement.
Last Topic Link Assigned	Displays the last topic link ID assigned. Used by Student Records on the Catalog Data page.
Last Service Request Number	Displays the last service request number assigned. This field is used in the Research Tracking service request ID number generation process. When entering a new service request, the system takes the current value and adds 1, then updates the field with the last calculated number. See “Setting Up Research Tracking” (Student Records)

Program Enrollment

Field or Control	***Description***
Last Academic Item ID	Displays the last academic item ID assigned. Used by Program Enrollment.
Last Course Group ID	Displays the last course group ID assigned. Used by Program Enrollment.

See the Student Records product documentation for Program Enrollment.

Activity Management

Field or Control	***Description***
Activity Registry Prefix & Seq	These two values concatenate to form the Activity Registry ID that is created in Add mode on the Activity Registry page.
Last Activity ID Prefix & Seq	These two values concatenate to form the Activity ID, which is used for managing coursework and ultimately for grading that coursework.
Last Link ID Prefix & Seq	These two values concatenate to form the Link ID that is assigned when generating Activity IDs using the Activity Generator or the Activity Manager. The Link ID is used to associate component and exam activities to multiple parent course roots and is not displayed on any component visible to an end user.
Mark Display Option	Define the decimal setting for **Mark** fields for the purpose of displaying setup values (for example, displaying the required passing mark to students). The length of the **Mark** field for storing student marks and calculating overall marks is controlled by the **Integer** and **Decimal Position** fields on the Result Scale.
Content Item Prefix	This field identifies the prefix to be used on the **Content Item ID** that the system generates when a content item is created in the Activity Registry.
Content Item Step	This number defines the default sequence between **Content Item IDs**. When you create a content item in the Activity Registry, the system assigns a content item ID (prefix + step number sequence). A value of *0010* indicates that content item ID numbers are sequenced by 10. You can change this value in the Activity Registry from the creation of one content item ID to the next.

Field or Control	***Description***
Create Initial Result Row	This setting provides three options when determining how to display the initial result row on the student's Individual Activity Manager (IAM) and the result roster. *Create Initial Result* – Select this option to insert a result row with an undetermined status automatically for each assessed activity ID assigned to a student. This creates a result row prior to a result being entered or calculated. This row is visible in the IAM and the result roster. This option can be overridden at the individual student IAM level. *Do Not Create Initial Result* – Select this option when you want to use the feature at the IAM level but wish to set it at the individual student level instead of establishing it automatically for all students. If not selected, the system does not create a result row until a result is entered or calculated. The value can be overridden at the individual student IAM level. *Do not use this option* – Select this option when choosing not to use the feature.
Display Maximum Mark	This setting provides three options when determining how to display the maximum mark on the result roster. *Display Maximum Mark* – Select this option to display the maximum mark allowed (as defined on the Result Scale) on the result roster for each student. You can override this default value on both the individual student IAM and the result roster. *Do Not Display Maximum Mark* – Select this option when you want to use the feature at the IAM and roster level but don’t want to populate the maximum mark by default to all students on all rosters. You can override this default value at the individual student IAM level. *Do not use this option* – Select this option when choosing not to use the feature.

Anonymous Grading

Field or Control	***Description***
Enable Anonymous Grading	Select this check box to use the anonymous grading feature.
Minimum ID Length, **Maximum ID Length**	Enter the minimum and maximum number of digits you want to generate for an anonymous ID.

See “Setting Up Anonymous Grading” (Student Records).

Default Values

In this group box, enter an **Academic Institution** to use as a default throughout the system.

Academic Advisement

In this group box, enter an option that affects the type of advisement report that a student sees in self service.

- *Academic Advisement*: This option is selected by default. It indicates that the institution plans to use standard Academic Advisement functionality to populate a student's self-service advisement report.
- *Program Guide*: Select this option to indicate that the institution plans to use Program Guide functionality to populate a student's self-service advisement report
- *Not in Use*: Select this option to indicate that the school intends to use neither method.

See “Understanding Batch Academic Advisement Reports” (Academic Advisement)

See “Viewing an Advisement Report” (Campus Self Service)

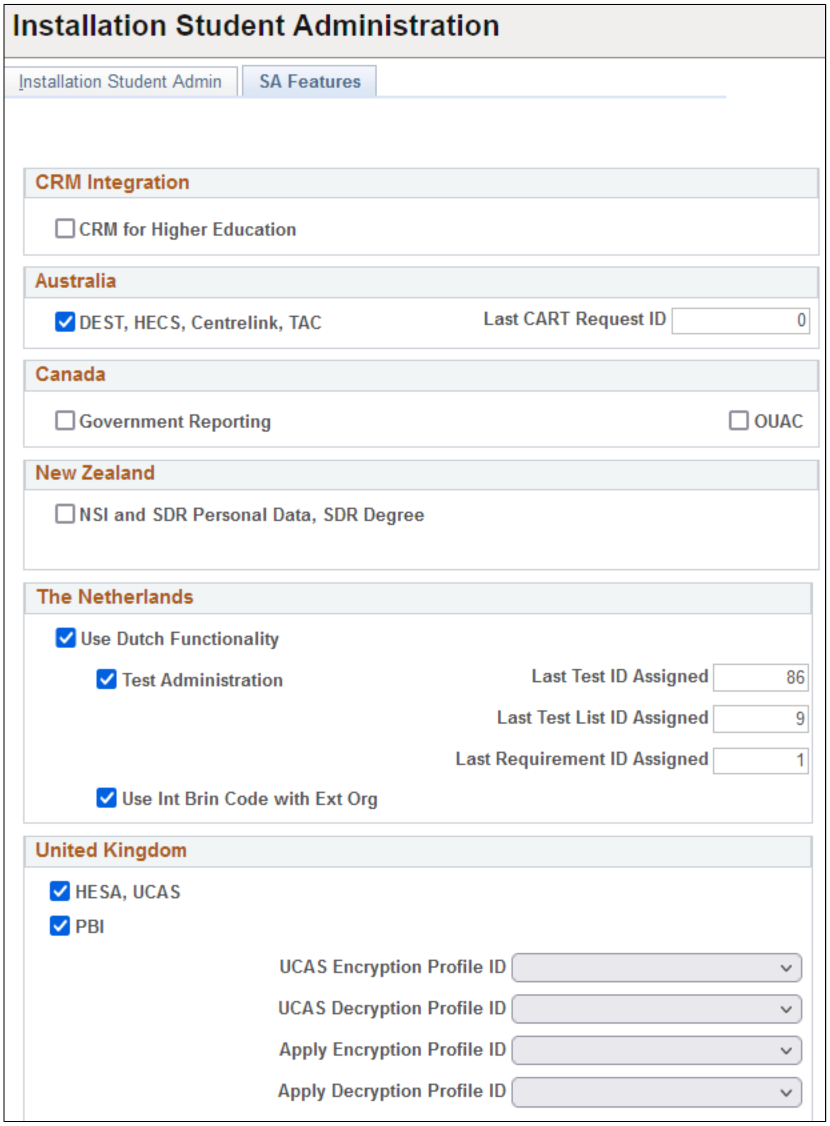
Research Management

Field or Control	***Description***
Consumption Model	Define a consumption model. None is selected by default. The option that you select here appears by default in the Consumption Controls group box on the Academic Program/ Academic Plan - Research Processing Options pages. See “Setting Up Research Tracking” (Student Records)

Selecting Country-Specific Features and Enabling CRM for Higher Education Feature

Access 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. You can find definitions for the fields and controls later on this page.



If CRM and Campus Solutions are both licensed at your institution, select the **CRM for Higher Education** check box to enable CS and CRM to share data in real time.

See Enabling Integration with CRM for Higher Ed.

(AUS, CAN, NZL, NLD, and GBR) Country-Specific Features

Select the appropriate check box to enable functionality specific to each country, which is setID-based.

Important! In order to use country-specific functionality in the system, you must also activate the country's features on the Academic Institution 6 setup page for institution-based functionality.

Field or Control	***Description***
DEST, HECS, Centrelink, TAC	Select to enable Australian features: Department of Education, Employment and Workplace Relations reporting, Higher Education Contribution Scheme functionality, Centrelink reporting, and Tertiary Admissions Centre admissions functions.
Last CART Request ID	Displays the last CART Request ID that the system assigned to a Centrelink Academic Reassessment Transformation (CART) request file. Each request file has a unique request ID. The system automatically increments the Last CART Request ID each time the CART Request File process loads a request file. If required, reset the Last CART Request ID number. Set a number so that automatic numbering does not create numbers that already exist in the data. This field appears only if you select the **DEST, HECS, Centrelink, TAC** check box.
Canada	Select to enable Canadian reporting functionality.
New Zealand	Select to enable New Zealand features: National Student Index data and Single Data Return functionality.
The Netherlands	Select to enable Dutch functionality.
United Kingdom	Select to enable United Kingdom features. If you select **HESA, UCAS**, then **UCAS Encryption Profile ID**, **UCAS Decryption Profile ID**, **Apply Encryption Profile ID**, and **Apply Decryption Profile ID** are enabled. If you provide values for these fields, upon saving, any XML-Link password or Apply Authentication token in UCAS Configuration (SAD_UC_CONFIG) are encrypted using the profile ID. Otherwise, the password or authentication token is saved as unencrypted text. See also “Setting Up UCAS and Teacher Training Options” (Recruiting and Admissions)

Related Links

(AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features

Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission List component (OPR_DEF_TBL_HR).

This section provides an overview of primary permission lists and discusses how to:

- Set permission list defaults.
- Set industry sector and payroll information.

Related Links

Understanding User Profiles Security

"Understanding PeopleSoft Campus Self-Service Personal Information" (Campus Self Service)

Understanding Primary Permission Lists

When you are using the User Profiles Management process, it is necessary for you to set up primary permission lists when you give user IDs access to pages.

Use the Primary Permission List table to set predefined tableset sharing as well as systemwide defaults and settings for each of the primary permission lists. The system displays by default the values that you indicate for a particular permission list in the Primary Permission List Preferences table—such as **business unit, setID, currency, country**, or **company code** —when a user associated with that permission list logs in to Campus Solutions or Contributor Relations. You can tailor the Campus Solutions systems for each user, controlling the default values that users see on pages in the system.

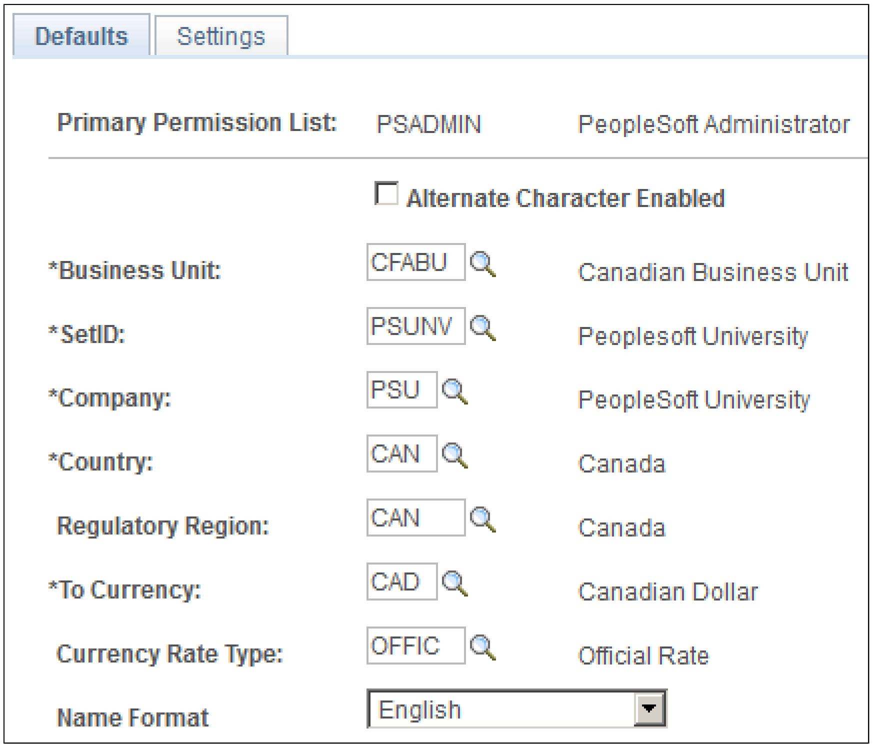
Pages Used to Set Up Primary Permission List Preferences

Page Name	***Definition Name***	***Navigation***	***Usage***
Defaults	OPR_DEF_TBL_HR	**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Org Defaults by Permission List** > **Defaults**	Set predefined tableset sharing and systemwide defaults for each primary permission list.
Settings	OPR_DEF_TBL_HR2	**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Org Defaults by Permission List** > **Settings**	Set the systemwide default settings for each permission list. By using this page, you can tailor the system for each permission list, controlling the default values that users see on pages in the system.

Setting Permission List Defaults

Access the Permission List - Defaults page (**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Org Defaults by Permission List** > **Defaults**).

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



Note: These defaults override the defaults that you set for these options in the Installation table for this permission list.
The TableSet Record Group Control table regulates what users see in prompt tables.

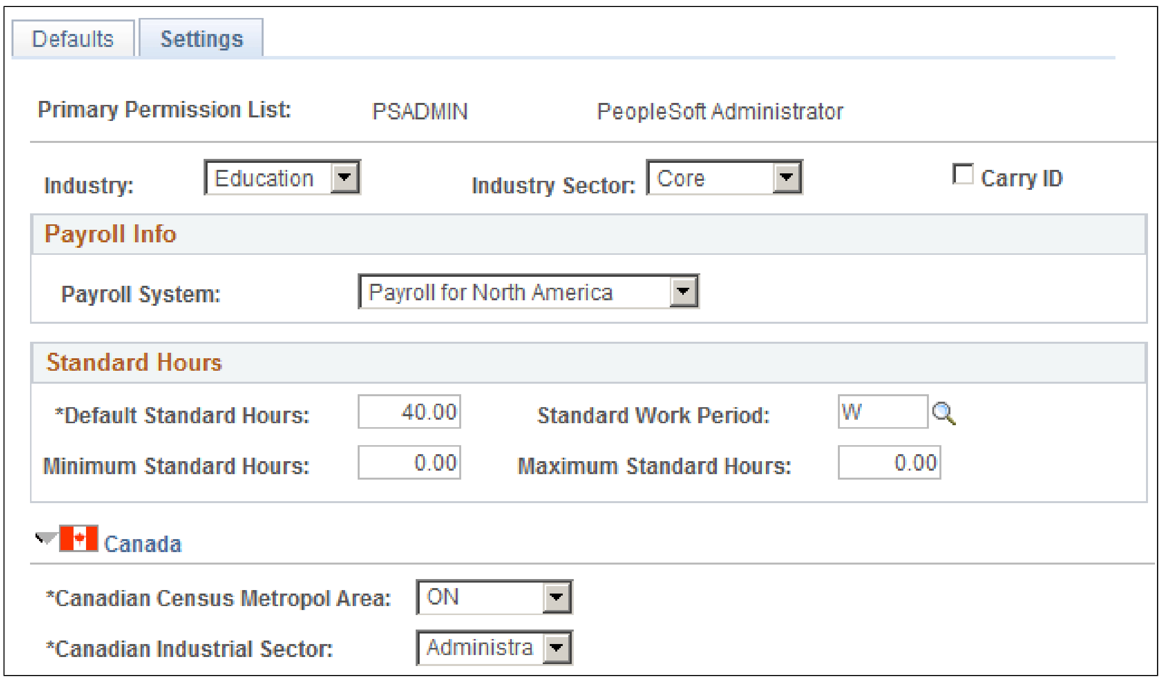
Field or Control	***Description***
Alternate Character Enabled	Select to indicate if you want alternate character searching enabled for this permission list.
Business Unit	Indicate the default business unit for this permission list from among the list of valid business units stored in the Business Unit table.
SetID	Indicate the default setID for this permission list from among the list of valid set IDs stored in the TableSet ID table. ***Warning!*** The values that you indicate here affect business unit and setID defaults for this permission list throughout the system.
Company	Enter the default company for this permission list.
Country	Enter the default country for this permission list.

Field or Control	Description
To Currency	Select a currency to act as default values for this permission list in Campus Solutions.
Currency Rate Type	Select a currency rate type to act as a default value for this permission list in Campus Solutions.

Setting Industry Sector and Payroll Information

Access the Permission List - Settings page (**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Org Defaults by Permission List** > **Settings**).

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



Field or Control	Description
Industry	Select the industry for this permission list. Select *Education* to indicate that this is an education database.
Industry Sector	Select the industry sector for this permission list. Values are: *Core*, *Public Sct* (public sector), and *US Federal.*
Carry ID	Select to carry an ID of the last individual or organization that you enter or select from search box to search box and page to page. You do not have to reenter or reselect the ID each time, if you want to continue editing or reviewing data for the same individual.

If you choose any country other than the U.S. on the Defaults page, country-specific fields may appear on the page as well.

Chapter 7

Setting Up Locations, Departments, and Companies

Setting Up Locations

This topic discusses how to define locations.

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations.
See:
Integrating Person Data
Integrating Setup Data
Monitoring Integrations Using the Integrity Utility
Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions in My Oracle Support (ID 2091799.2).

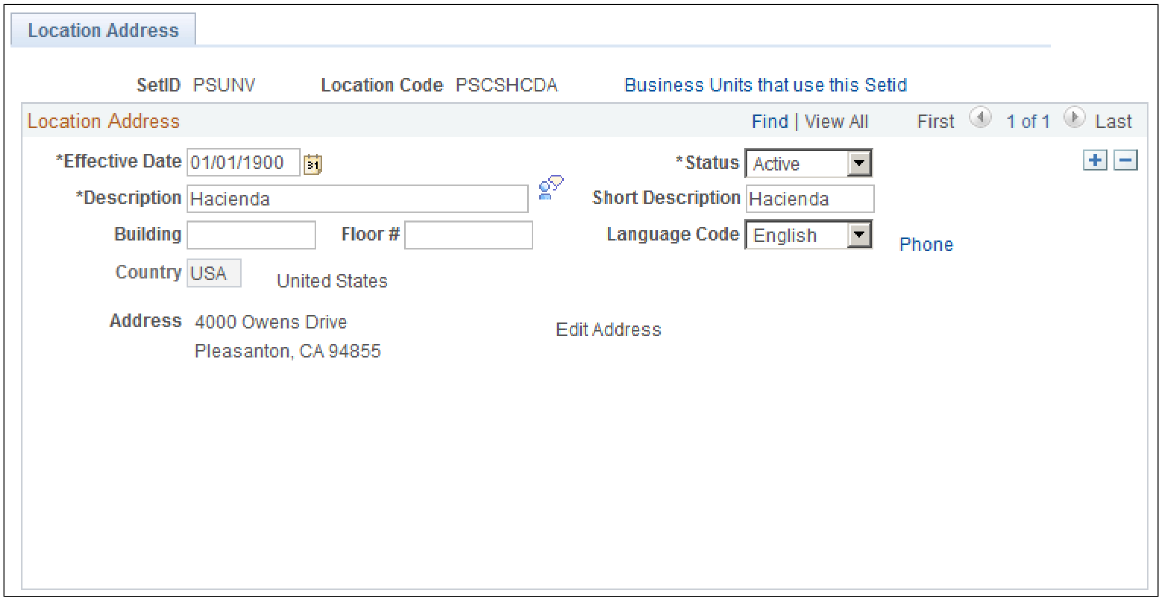
Pages Used to Set Up Locations

Page Name	***Definition Name***	***Navigation***	***Usage***
Location Address	LOCATION_TABLE1	**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Location Address**	Identify or review physical locations.
Business Units by Location	LOC_BU_SEC	Click the Business Units that use this setID link on the Location Address page.	View a list of the business units that use this setID.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter a phone number and fax number for a physical location.

Defining Locations

Access the Location Address page (**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Location** > **Location Address**).

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



The locations that you define here are used within various features in Campus Solutions.

Note: Do not confuse this location page with the Location Addresses (LOC_ADDR_TABLE) page on which you set up campus location addresses (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Location Address Table).

Setting Up Departments

This topic discusses how to define departments.

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations.
See:
Integrating Person Data
Integrating Setup Data
Monitoring Integrations Using the Integrity Utility
Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions in My Oracle Support (ID 2091799.2).

Page Used to Define Departments

Page Name	***Definition Name***	***Navigation***	***Usage***
Department Profile	DEPARTMENT_TBL_GBL	**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Departments** > **Department Profile**	Identify an internal business entity or department.

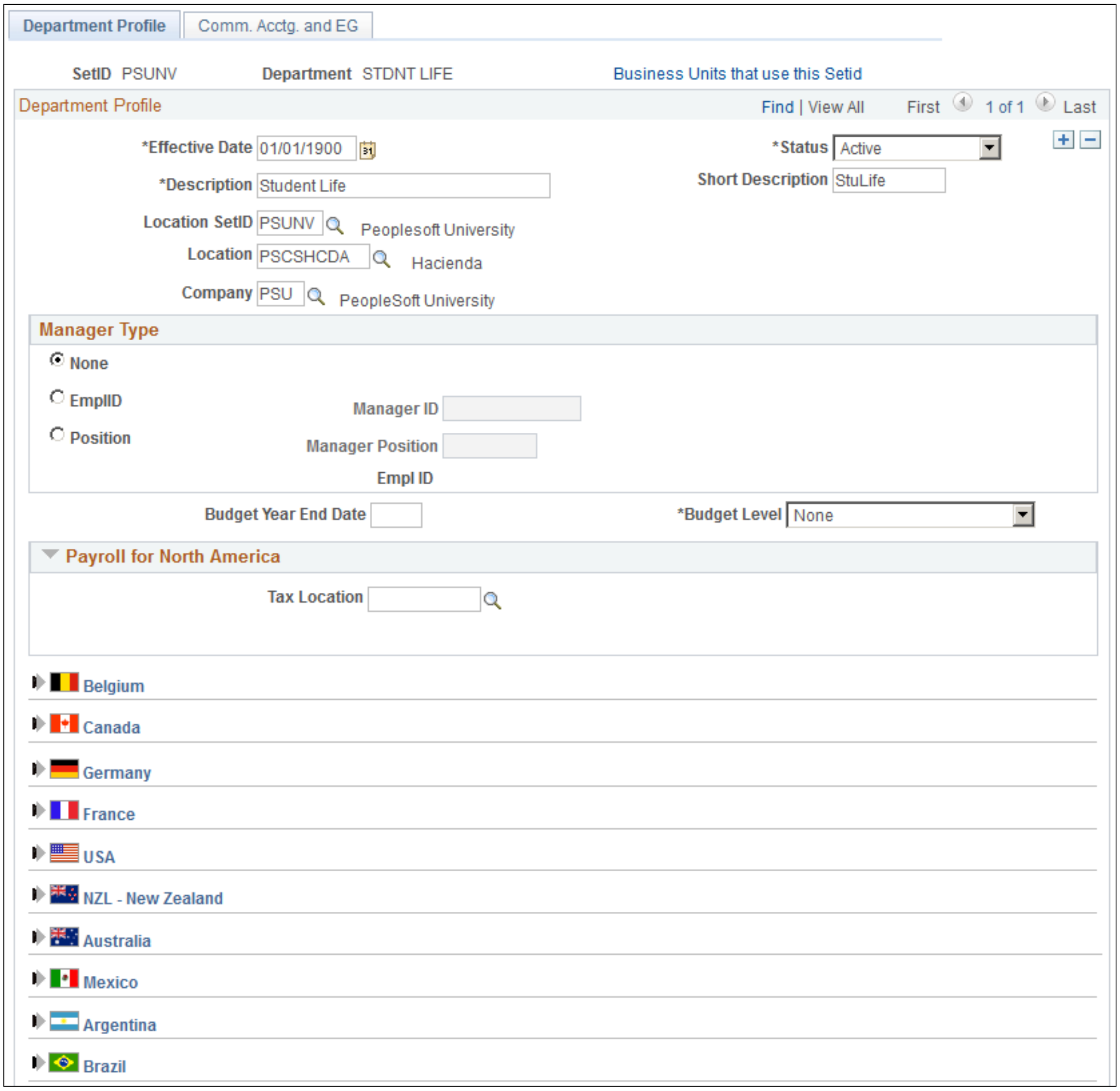
One example of how departments are used in Campus Solutions is when you set up service indicator codes. See “Setting Up Service Indicator Codes and Reasons” (Campus Community Fundamentals).

To set up department security, see Managing Department Security.

Defining Departments

Access the Department Profile page (**Set Up Common Objects** > **Foundation Tables** > **Organization** > **Departments** > **Department Profile).**

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



Field or Control	***Description***
Effective Date	If you add a new department, set its effective date to predate (or be equal to) the effective date of your security tree.
Location Set ID and Location	To associate a department with a physical location, select the location. Maintain these values in the Locations component.

Setting Up Companies

This topic discusses how to define companies.

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations.
See:
Integrating Person Data
Integrating Setup Data
Monitoring Integrations Using the Integrity Utility
Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions in My Oracle Support (ID 2091799.2).

Pages Used to Set Up Companies

Page Name	*Definition Name*	*Navigation*	*Usage*
Company Location	COMPANY_TABLE1	**Set up Common Objects > Foundation Tables > Organization > Company > Company Location**	Define companies.
Company - Phones	COMPANY_TABLE3_GBL	**Set up Common Objects > Foundation Tables > Organization > Company > Phones**	Enter telephone information for a company.

Chapter 8

Integrating Campus Solutions with Human Capital Management

Understanding CS-to-HCM Integration

You can integrate PeopleSoft Campus Solutions (CS) and PeopleSoft Human Capital Management (HCM), enabling the two systems to share a person model. Although the two databases remain separate, your institution maintains the ability to search for people and maintain a single EmplID across CS and HCM.

Your institution's business processes determine the proper way to integrate the separate instances. These topics describe several possible integration approaches.

Note: These topics describe integration processes between CS release 9.2 and HCM 9.1/9.2.

Integrating Person Data

This section discusses how to:

- Understand person data integration.
- Review integrated person data.
- Understand the business process.
- Understand external Search/ Match integration.
- Use external Search/Match to integrate with external systems.
- Configure the Last Employee ID Assigned number.
- Publish and subscribe to person data.
- Configure web services for person data.
- Understand Person Data FullSync and Sync Service Operations and Handlers.

Note: These topics describe integration processes between CS release 9.2 and HCM 9.1/9.2.

Note: Documentation relevant to Campus Solutions and Human Capital Management integration is available on My Oracle Support (ID 2091799.2).

Understanding Person Data Integration

Oracle provides the tools that allow you to directly integrate person data between CS and HCM systems. The suite of person attributes is transferred primarily by the PERSON_BASIC_SYNC message. The data that comprises the message includes the core person data historically contained in PERSON_BASIC_SYNC, plus CS extension data (such as FERPA) contained in the PERSON_SA message and global subrecords. Ethnicity and diversity information are also part of the integrated person data set. Subscription handlers enable inbound person additions and updates in both CS and HCM. PERSON_BASIC_SYNC can also subscribe to incoming person data from an external source.

Direct integration between CS and HCM requires only the use of Integration Broker to enable and orchestrate the integration. No additional integration mechanism is required.

CS also subscribes to the WORKFORCE_SYNC message to bring job data (mastered in HCM) into CS for those CS processes that require it (such as assigning an instructor to a class).

Reviewing Integrated Person Data

In general, the following key person bio-demo and other data are synchronized between the systems. The delivered integrations include data fields for country localizations and other personal attributes which may or may not be used in your implementation.

- Names
- Addresses
- Phones
- Emergency Contacts
- Email Addresses
- National IDs
- Gender
- Birth date
- Date of Death
- Marital Status
- FERPA Flag
- Disability
- Ethnicity/Diversity
- Citizenship
- Passport
- Visa/Permits
- Job

- HR Operator Defaults
- User Profiles

In the distinct ownership model, the following person bio-demo data is fetched from one system to the other as part of the External Search/Match process:

- EmplID
- Names
- Addresses
- Phones
- Email Addresses
- National IDs
- FERPA Flag
- VA Benefit

Understanding the Business Process

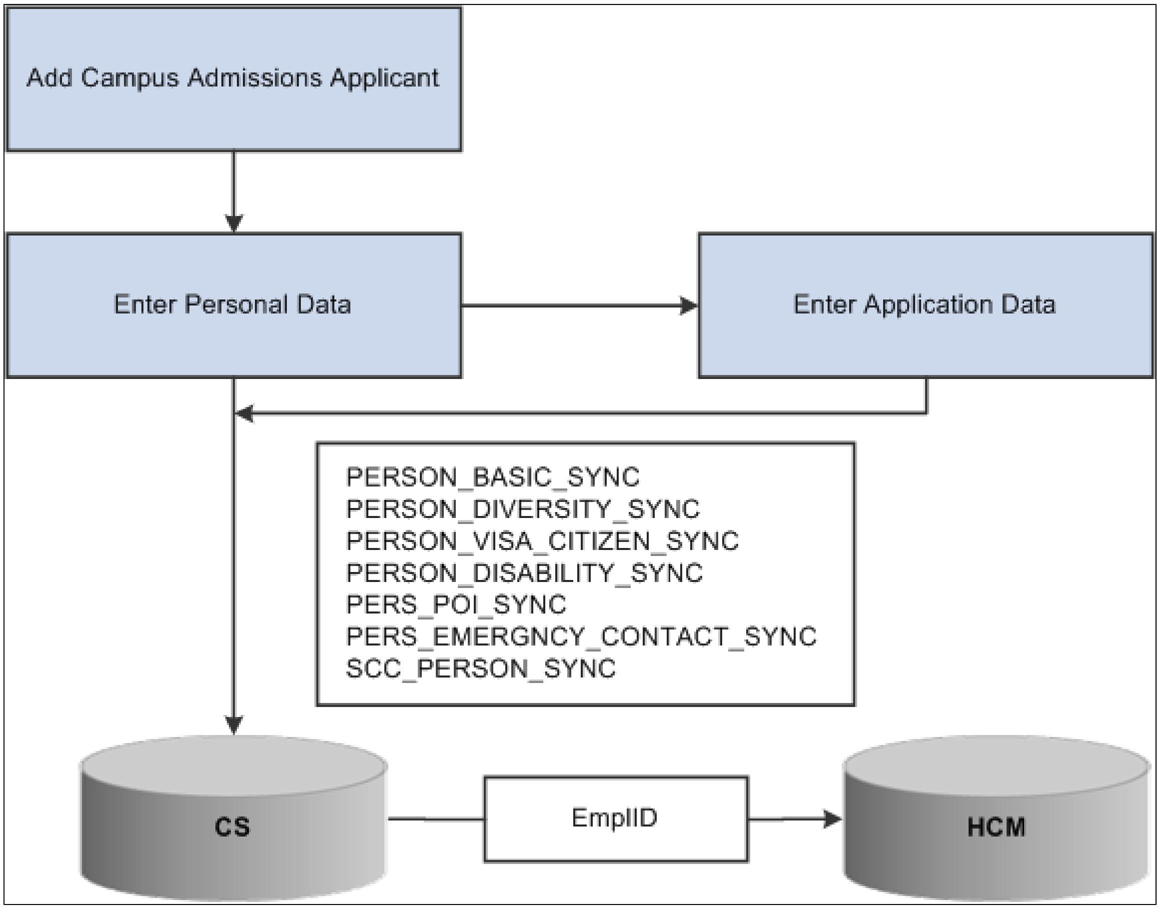
In a CS-to-HCM integrated environment, the person record is physically separated, but institutions have the choice to synchronize all person data with HCM, or none of it. Some institutions may want to separate not just their data but their business processes to more closely reflect policies of data ownership between student and human resources administration on campus.

CS supports three models of person data integration between CS and HCM: Owner/Subscriber, Subscriber-Only and Distinct Ownership. Institutions can use the tools described in this documentation to configure the integration to reflect their business needs.

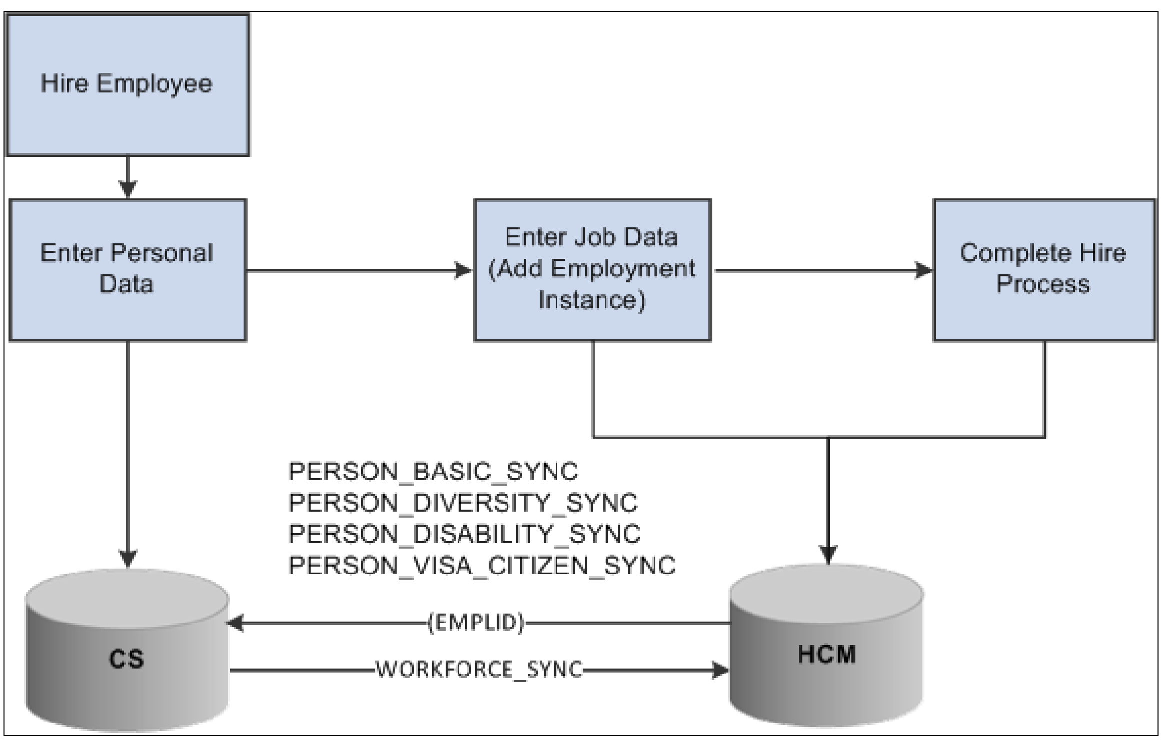
Owner-Subscriber

In an owner-subscriber integration model, one system is defined as the system of record and the other system subscribes to its person data messages. All EmplIDs exist and are in sync in both databases. For example, if CS is defined as the owner for adding and updating person data, the HCM system subscribes to the person messages; integration setup feeds person data additions and updates to HCM. The end-user experience can be managed via a portal or related content to navigate a combination of CS and HCM menus and pages.

This workflow depicts the process of adding an Admissions applicant in CS.



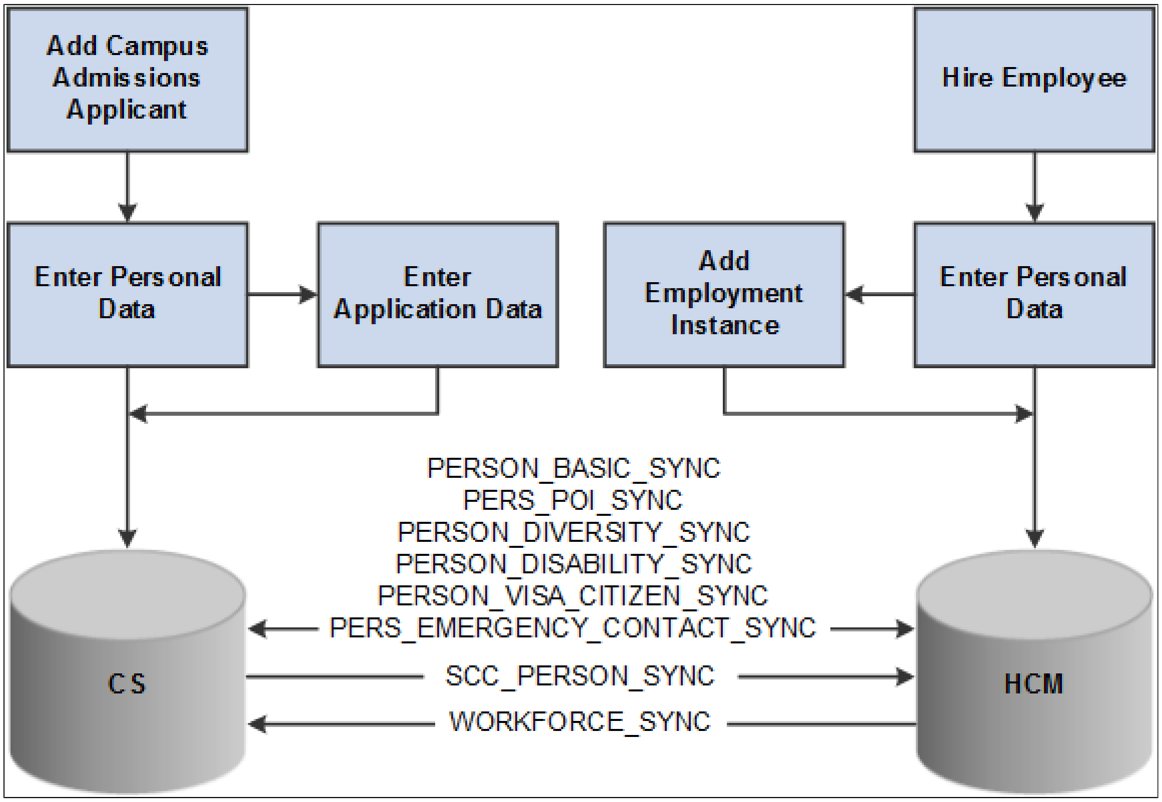
This workflow depicts the process of hiring an employee in HCM.



Subscriber Only

In a subscriber-only integration model, both systems are defined as system of record and integrations are configured to allow both systems to publish and subscribe to person data messages. All EmplIDs are populated to both systems and are kept in sync.

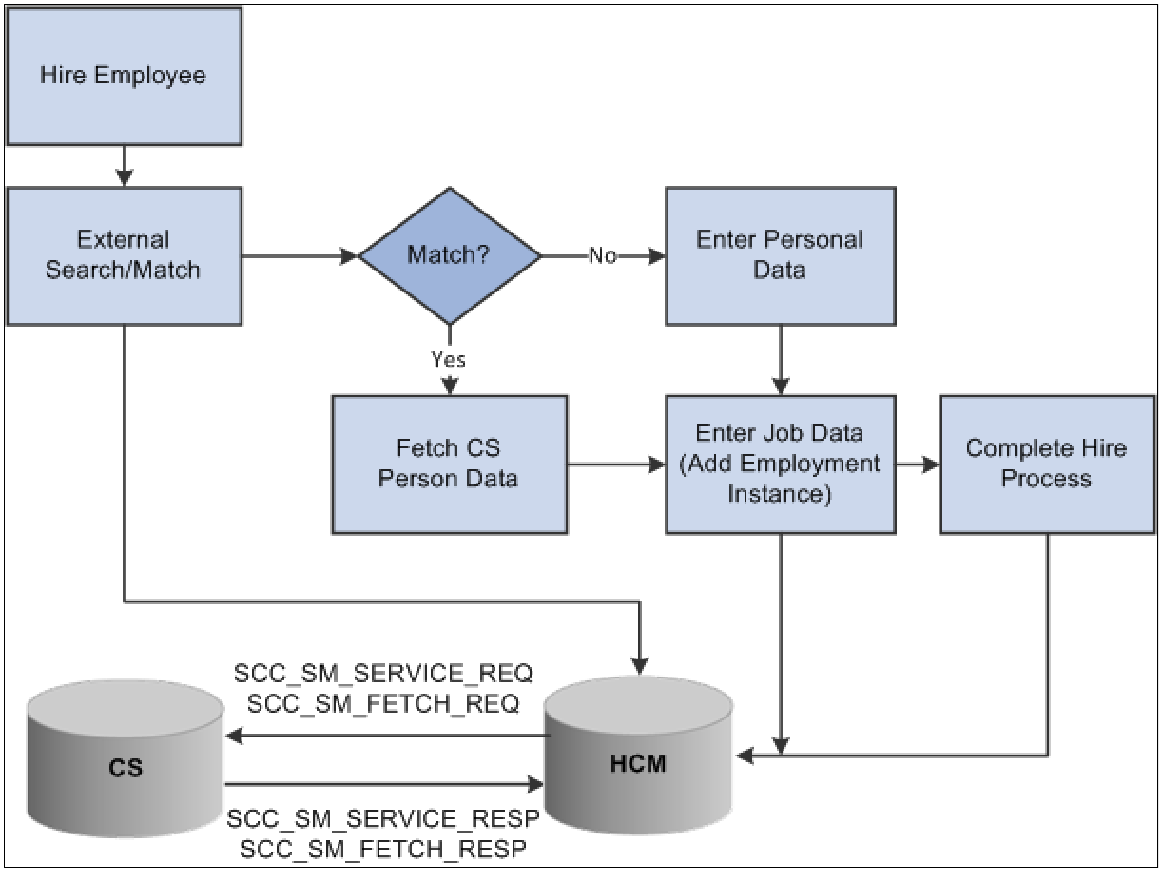
This workflow depicts the process of adding an Admissions applicant or employee in the Subscriber-only model.



Distinct Ownership

In a distinct ownership integration model, person data is added and updated in the appropriate CS or HCM system (as determined by the business processes of your institution; for example, employees are added and maintained in HCM). External Search/Match then becomes the method used in each system to ensure that users do not create duplicate records on campus. For example, as an employee is added to HCM, External Search/Match determines whether that new employee is already a student in CS with an EmplID and other bio-demo data housed in the CS system. If so, a "fetch" process can pull that EmplID and person data to HCM, ensuring that the individual retains a single unique ID on campus. Thereafter, each system must be manually updated, with no further integration between them.

This workflow depicts the process of adding an employee in HCM using External Search/Match to CS.



Understanding External Search/Match Integration

In an integrated, separate-instance environment using the distinct ownership model, users who want to maintain a single EmplID must use External Search/Match in each system to ensure the creation of unique person records. Initially, users use positive External Search/Match results to locate and add person data from the external system (such as a CS user searching against HCM); subsequently, person updates must be done manually in both instances to avoid becoming out of sync.

In the distinct ownership integration model, External Search/Match is the tool used to ensure that only unique EmplIDs are added to any system. With distinct ownership, people are added in either the CS or HCM system (as appropriate); both systems use External Search/Match to search for possible duplicate records so only unique IDs are shared between the databases. However, both databases must be running in order for External Search/Match to work.

Using External Search/Match to Integrate with External Systems

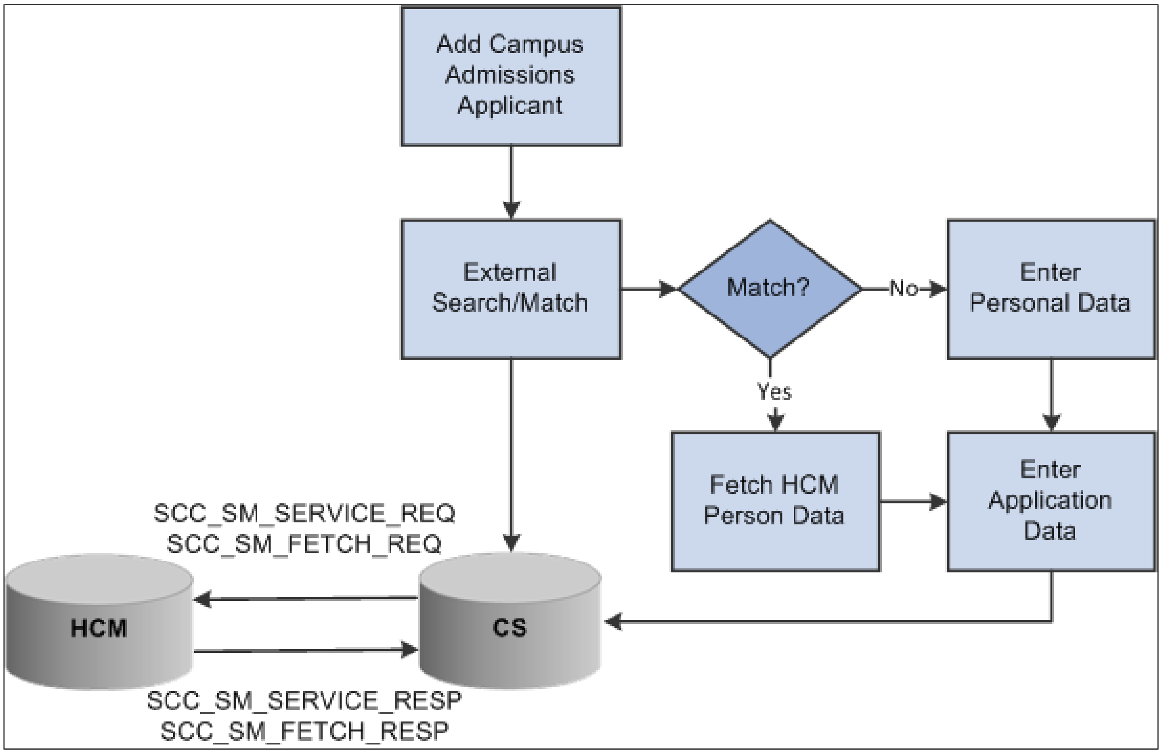
External Search/Match can search against HCM to identify potential duplicate person records as well as carry EmplIDs throughout a business process.

See also:

“Setting Up External Search/Match Functionality” (Campus Community Fundamentals)

“Using Search/Match” (Campus Community Fundamentals)

This workflow depicts the process of adding an admissions applicant in CS using External Search/Match.



Configuring the Last Employee ID Assigned Number

You need to review and update the Last Employee ID Assigned numbers on your systems to ensure EMPLID values are assigned in proper ranges and to prevent data integrity problems with conflicting EMPLID values being assigned.

- In an owner/subscriber configuration, the database instance that is the system of record for personal information is responsible for assigning the next EMPLID value.
- In a subscriber-only configuration, both databases assign EMPLID values. Determine the range of EMPLID values that can provide the maximum number of new persons expected to be added to each system over its lifetime. For example, you may anticipate more new persons to be added first to your CS system, therefore set the Last Employee ID Assigned value in the CS instance to a value that will allow for the most growth over time.

This step should be done with careful evaluation of the EMPLID number strategy you have implemented. Consider the following:

- Do you have custom EMPLID assignment routines that are used to set the next ID number?
- Do your users have established business practices that reserve certain number ranges?
- Which system is expected to typically create the most new persons?

To update the Last ID Assigned, navigate to **Set Up Common Objects** > **Install** > **Installation Table.** This navigation is the same for both CS and HCM.

On the Last ID Assigned page, update the **Last Employee ID Assigned** field to the number desired.

See:

- Integrating Setup Data
- Selecting General Installation Options

Publishing and Subscribing to Person Data

In an owner-subscriber integration approach, the following messages move data asynchronously from the owner to the subscriber:

- PERSON_BASIC_SYNC
- PERSON_DIVERSITY_SYNC
- PERSON_VISA_CITIZEN_SYNC
- PERSON_DISABILITY_SYNC
- PERS_POI_SYNC
- PERS_EMERGNCY_CONTACT_SYNC
- SCC_PERSON_SYNC

The WORKFORCE_SYNC message integrates job data between the two systems; where necessary, from HCM to CS.

Minimum setup information must be available and loaded from your HCM system to your CS system for implementation. This should be completed before any transactional data syncs are performed. The values defined in these setup tables are key to person bio-demo data integrity. Oracle recommends that your setup tables be mastered in the HCM instance.

Incremental Synchronization

Data in the supporting tables in your system of record may change over time after the initial loading of setup, transactional data, and security data. Use incremental sync (Sync) services to send this information from your system of record to your subscribing target system to maintain data integrity.

An incremental sync captures data that was created, added, changed, or deleted in the system of record since the last synchronization. It uses the captured data to overwrite the same data in the subscribing system, thereby refreshing the subscribing system so that both systems have the same data.

After the initial fullsync data loads have completed in your subscribing target system, you may inactivate the associated fullsync services, and then activate the appropriate incremental Sync services to keep your systems updated.

Manual Entry Data Load

You can, if necessary, enter data manually into your CS and HCM systems. However, it would be tedious, time consuming, and possibly introduce typographical errors. Oracle does not recommend this method for most data elements unless required to load a small amount of data.

Transactional Data Loading Sequence

For all owner/subscriber configurations, person transactional information must be available and loaded from your system of record to your subscribing system for implementation. Oracle recommends that CS be the system of record for Person data. Your HCM system should remain the system of record for all HCM Workforce and other HR related transactional data.

Note: Carefully plan your requirements for the initial load of transaction data for your specific implementation. If you are doing a new install of HCM, you need to load this transaction data as part of your implementation. Customers upgrading to HCM 9.1 or HCM 9.2 from a combined HCM and CS 9.0 database will already have the proper transaction data in place in both systems.

The following table lists the required integration, indicates the type of service recommended, and the order in which you must load transactional table data into your HCM system.

Person Transaction Data Campus Solutions to HCM

Integration Name	*HCM Table*
PERSON_BASIC_FULLSYNC.VERSION_4	PERSON PERS_DATA_EFFDT PERS_DATA_USF* PERS_NID NAMES ADDRESSES EMAIL_ADDRESSES PERSONAL_PHONE PERS_SMOKER* PERSON_BRA* PERS_DATA_BRA* PERS_DATA_CAN PERS_DATA_CHE* PLACE_ORIG_CHE* PERS_HUKOU_CHN* PERS_DATA_DEU* NATIONALITY_GER* PERS_DATA_ESP* PERSON_FRA* PERS_DATA_FRA* PERS_DATA_IND* PERS_DATA_ITA* PERS_DATA_JPN* PERS_DATA_MEX* PERS_DATA_USA PERS_DATA_FPS* PERSON_SA

Integration Name	***HCM Table***
PERS_EMERGNCY_CONTACT_FULLSYNC	EMERGENCY_CNTCT EMERGENCY_PHONE
PERS_POI_FULLSYNC.VERSION_1	PER_POI_TYPE PER_POI_SCRTY PER_POI_SCR_DT PER_POI_TRANS
PERSON_DISABILITY_FULLSYNC.VERSION_2	DISABILITY ACCOM_REQUEST DISABILITY_FRA* DISABILITY_GER* DISABILITY_CHE* DISABILITY_ESP* DISABILITY_BRA* DISABILITY_NLD* DISABILITY_NZL*
PERSON_DIVERSITY_FULLSYNC.VERSION_2	DIVERSITY DIVERS_ETHNIC DIVERS_RELIGION*
PERSON_VISA_CITIZEN_FULLSYNC1.VERSION_1	CITIZENSHIP CITIZEN_PSSPRT
PERSON_VISA_CITIZEN_FULLSYNC2.VERSION_1	VISA_PMT_DATA VISA_PMT_SUPPRT

*Existing CS functionality does not populate these tables. Depending on your use of HCM functionality, the records marked with an asterisk may not have data present at the time the fullsync is published.

Configuring Web Services for Person Data

This section provides a summary of Person Data FullSync and Sync Service Operations and Handlers, and discusses how to:

- Configure Integration Broker Gateway and Nodes.
- Configure PERSON_BASIC_SYNC Service.

Note: These instructions describe the setup of CS 9.2 and HCM 9.1/9.2 databases.

Configuring the Integration Broker Gateway and Nodes

To configure the Integration Broker Gateways and Nodes in your CS and HCM databases:

1. Set the Service Configuration in the HCM database.
2. Configure the Gateway in the HCM database.
3. Configure the default local node in the HCM database.
4. Configure the HCM Gateway in the CS database.
5. Configure the CS node in the HCM database.
6. Configure the default LOCAL node in the CS database.
7. Configure the HCM node in the CS database.
8. Update the HCM Gateway nodes in the HCM database.
9. Update the HCM Gateway nodes in the CS database.
10. Update the Single Sign-on nodes.
11. Test Nodes.

1. Setting the Service Configuration in the HCM database.

   Navigate to**PeopleTools** > **Integration Broker** > **Configuration** > **Service Configuration,**and set up the following:

Field or Control	***Description***
Service Namespace	http://xmlns.oracle.com/Enterprise/HCM/services
Schema Namespace	http://xmlns.oracle.com/Enterprise/Tools/schemas
Target Location	http://machinename:port/PSIGW/ PeopleSoftServiceListeningConnector

Field or Control	Description
Service System Status	Production

2. Configuring the Gateway in the HCM database.

    a. Navigate: **PeopleTools** > **Integration Broker** > **Configuration** > **Gateways.**

    b. Select Integration Gateway ID = LOCAL.

    c. Set URL = http://machinename:port/PSIGW/PeopleSoftServiceListeningConnector/databasename.

    d. Click the **Load Gateway Connectors** button. Save after it loads 9 connectors

    e. Click the **Ping Gateway** button. If successful, it displays an *Active* status.

3. Configuring the default local node in the HCM database.

    a. Navigate to**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes.**

    b. Select the default local node and set up the following:

Field or Control	Description
Set Descr	**HCM Instance**
Authentication Option	Password
Node Password	PS
Default User ID	PS

    c. Click the Connectors tab and set the following:

Field or Control	Description
Gateway ID	LOCAL
Connector ID	PSFTTARGET

    d. Click the Portal tab and set up the following:

Field or Control	***Description***
Tools Release	8.54.xx
Set Application Release	HCM
Content URI Text	http://machinename:port/psc/databasename
Portal URI Text	http://machinename:port/psp/databasename

Note: Use <CTRL>+J keys to see the tools release string.

e. Click the **WS Security** tab and set the following:

Field or Control	***Description***
Authentication Token Type	None
Encrypted	Disable the check box.

f. Save.

4. Configuring the HCM Gateway in the CS database.

a. Navigate to **PeopleTools** > **Integration Broker** > **Configuration** > **Gateways,** and select .**Add a New Value.**

b. Set the following:

Field or Control	***Description***
Integration Gateway ID	<Gateway Name for HCM>
URL	http://machinename:port/PSIGW/ PeopleSoftListeningConnector/databasename

c. Click the **Load Gateway Connectors** button. It should load 9 connectors. Save.

d. Click the **Ping Gateway** button.

If successful, it displays an *Active* status.

5. Configuring the CS node in the HCM database.

a. Navigate to**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes,** and set up the following:

Field or Control	***Description***
Add Node	Name of CS Node
Set Descr	CS Instance
Set Authentication Option	Password
Node Password	PS
Default User ID	PS

b. Click the **Connectors** tab and set up the following:

Field or Control	***Description***
Gateway ID	LOCAL
Connector ID	PSFTTARGET

c. Click the **Portal** tab and set up the following:

Field or Control	***Description***
Tools Release	8.54.xx
Set Application Release	CS release version
Content URI Text	http://machinename:port/psc/databasename
Portal URI Text	http://machinename:port/psp/databasename

d. Click the **WS Security** tab and set the following:

Field or Control	***Description***
Authentication Token Type	None

Field or Control	Description
Encrypted	Disable the check box.

e. Click **Save**.

6. Configuring the default LOCAL node in the CS database.

Note: The gateway used by this node is the HCM gateway. Node passwords must be consistent between the CS and the HCM databases.

a. Navigate: **PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes.**

b. Select the default local node and set up the following:

Field or Control	Description
Description	Set Descr = CS Instance
Authentication Option	Password
Node Password	PS
Default User ID	PS

c. Click the **Connectors** tab and set up the following:

Field or Control	Description
Gateway ID	Gateway Name for HCM instance **Note:** This is not the local gateway.
Set Connector Id	PSFTTARGET

d. Click the **Portal** tab and set up the following:

Field or Control	Description
Tools Release	8.54.xx

Field or Control	***Description***
Set Application Release	CS release version
Content URI Text	http://machinename:port/psc/databasename
Portal URI Text	http://machinename:port/psp/databasename

e. Click the **WS Security** tab and set the following:

Field or Control	***Description***
Authentication Token Type	None
Encrypted	Disable the check box.

f. Click **Save.**

7. Configuring the HCM node in the CS database.

Note: Each node is defined twice – once in each database. They should each use the same gateway.

a. Navigate to **PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes, and set up the following:**

Field or Control	***Description***
Add Node	Name of HCM Node
Set Descr	HCM Instance
Set Authentication Option	Password
Node Password	PS
Default User ID	PS

b. Click the Connectors tab and set up the following:

Field or Control	***Description***
Gateway ID	Gateway Name for HCM instance **Note:** This is not the local gateway.
Set Connector Id	PSFTTARGET

c. Click the **Portal** tab and set the following:

Field or Control	***Description***
Tools Release	8.54.xx
Set Application Release	HCM release version
Content URI Text	http://machinename:port/psc/databasename
Portal URI Text	http://machinename:port/psp/databasename

d. Click the **WS Security** tab and set the following:

Field or Control	***Description***
Authentication Token Type	None
Encrypted	Disable the check box.

e. Click **Save.** A Node Saved message box appears. Click **OK**.

8. Updating the HCM Gateway nodes in the HCM database.

   Both CS and HCM database nodes should point to the same Gateway. The specific Gateway should also have both nodes listed in the Gateway Advanced Properties.

   a. Navigate: **PeopleTools** > **Integration Broker** > **Configuration** > **Gateways.**

   b. Select gateway LOCAL.

   c. Click the **Gateway Setup Properties** link and set the following:

Field or Control	Description
User ID	administrator
Password	Enter a password.

Click **OK**.

d. In the Gateway Default App. Server frame, set the **App Server URL** to *' //machinename:port.*

Note: Your port must match the one specified in your HCM application server.

e. Enter the appropriate User ID and password.

f. Set the tools release to 8.54.xx.

g. Make sure both the HCM and CS nodes are in the PeopleSoft Nodes tab. Ping the HCM node. It should be successful.

h. Click **Return**.

9. Updating HCM Gateway nodes in the CS database.

   Follow the process outlined in Step 8 to update the HCM Gateway node in the CS database.

10. Updating the Single Sign-on nodes in both CS and HCM databases.

    Single Sign-on is used in this recommended configuration.

    a. Navigate: **PeopleTools** > **Security** > **Security Objects** > **Single Signon.**

    b. Ensure that both the default local node and the other node you are using are listed.

11. Testing Nodes.

    Both nodes must be 'pingable' from each database. On each database,

    a. Navigate: **PeopleTools** > **Integration Broker** > **Service Operations Monitor** > **Administration** > **Node Status.**

    b. Enter the node name and click the **Ping Node** button. It should respond successfully.

Configuring the PERSON_BASIC_SYNC Service

The PERSON_BASIC_SYNC service is the primary integration point for syncing core personal data between your CS and HCM systems. The following tasks detail how to configure the PERSON_BASIC_SYNC service to publish from your CS system and subscribe in the target HCM system.

- Owner/Subscriber: If you implement the owner/subscriber model, you can configure your PERSON_BASIC_SYNC service to publish from your primary CS system to your target HCM system.
- Subscriber Only: If you implement the subscriber–only model, you can configure the PERSON_BASIC_SYNC service in both your CS and HCM systems to publish and subscribe.

Note: The source and target database configuration tasks described are for CS 9.2 (source) and HCM 9.1/9.2 (target) databases on PeopleTools 8.54.xx.

Configuring Campus Solutions as the Source Database

1. Update security by adding the Service Operation(s) to your primary permission list.

   a. Navigate to **PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists**.

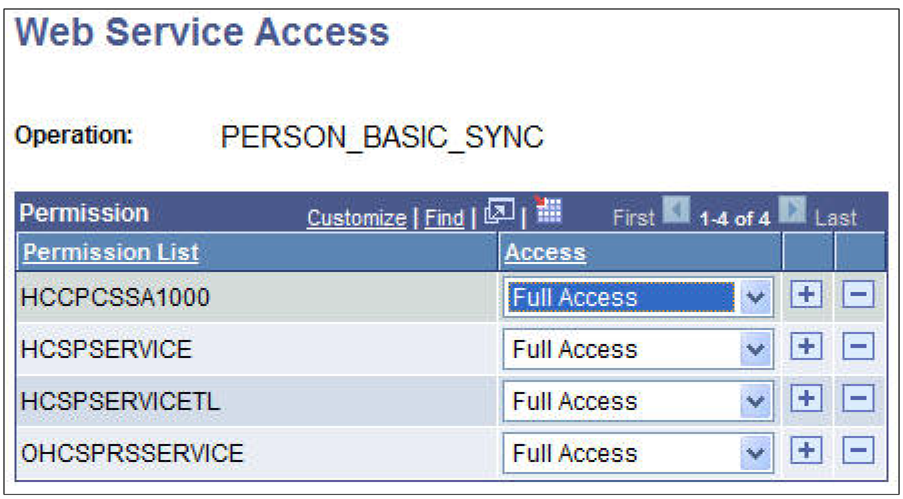
   b. Select the relevant permission list from the search dialog box.

   c. Select the **Web Services** tab.

   d. Enter the corresponding Service(s) for the Service Operation(s) you want to use.

   e. Click the **Edit** link and select **Full Access** to provide access to the relevant Service Operation(s) listed on the Web Service Permissions secondary page.

   This graphic provides an example of the Web Service Access page for the PERSON_BASIC_SYNC operation.

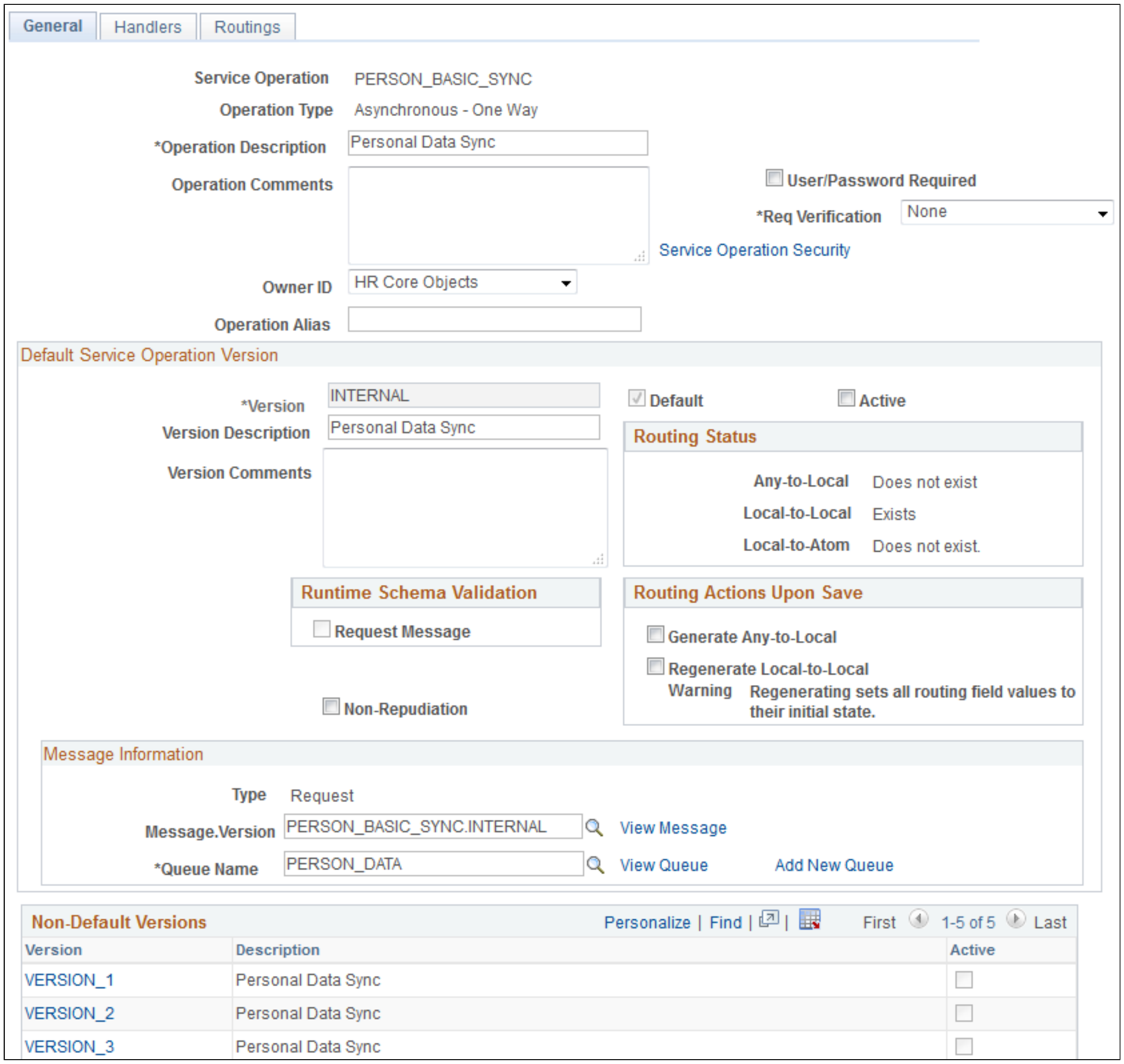


2. Activate Service Operations and Create Routings in CS.

   a. Navigate to **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**.

   b. Select PERSON_BASIC_SYNC from the search dialog box.

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

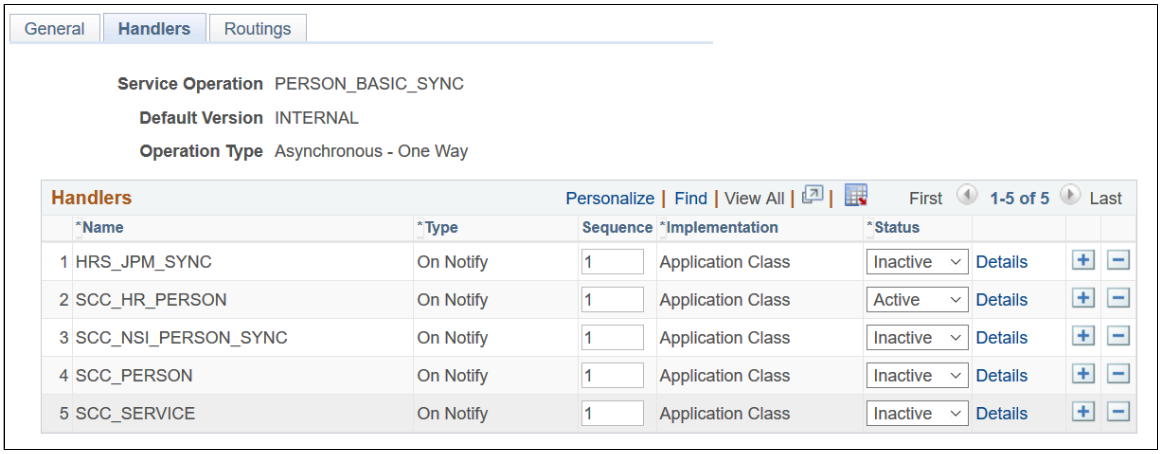


c. Check the **Active** check box on the General tab.

d. Make note of the **Queue Name** field, as you need to verify that the PERSON_DATA Queue is in *Running* status later.

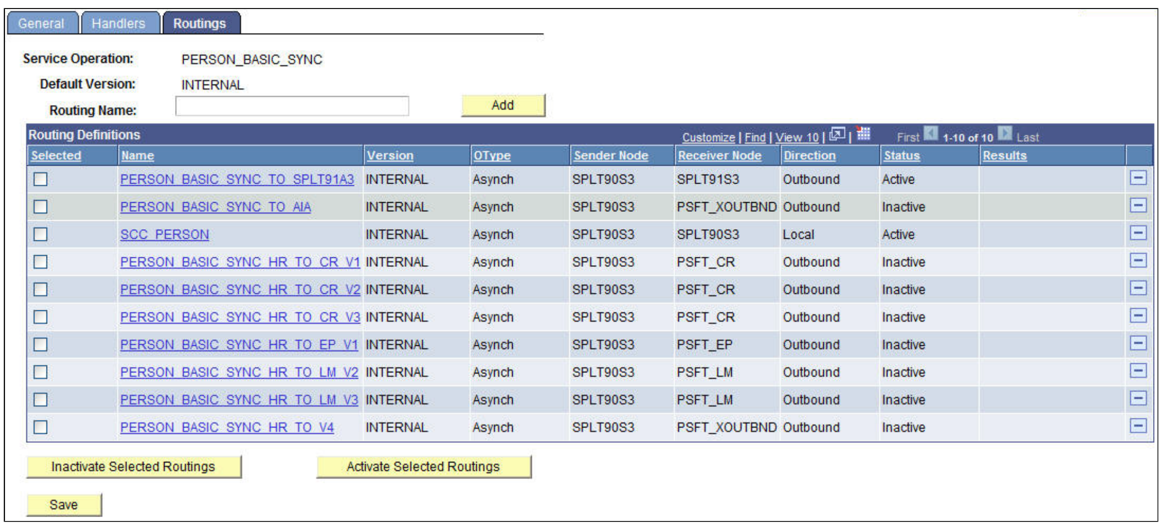
e. Click the Handlers tab. Set the SCC_HR_PERSON handler to *Active.*

This example illustrates the fields and controls on the PERSON_BASIC_SYNC Handlers page.



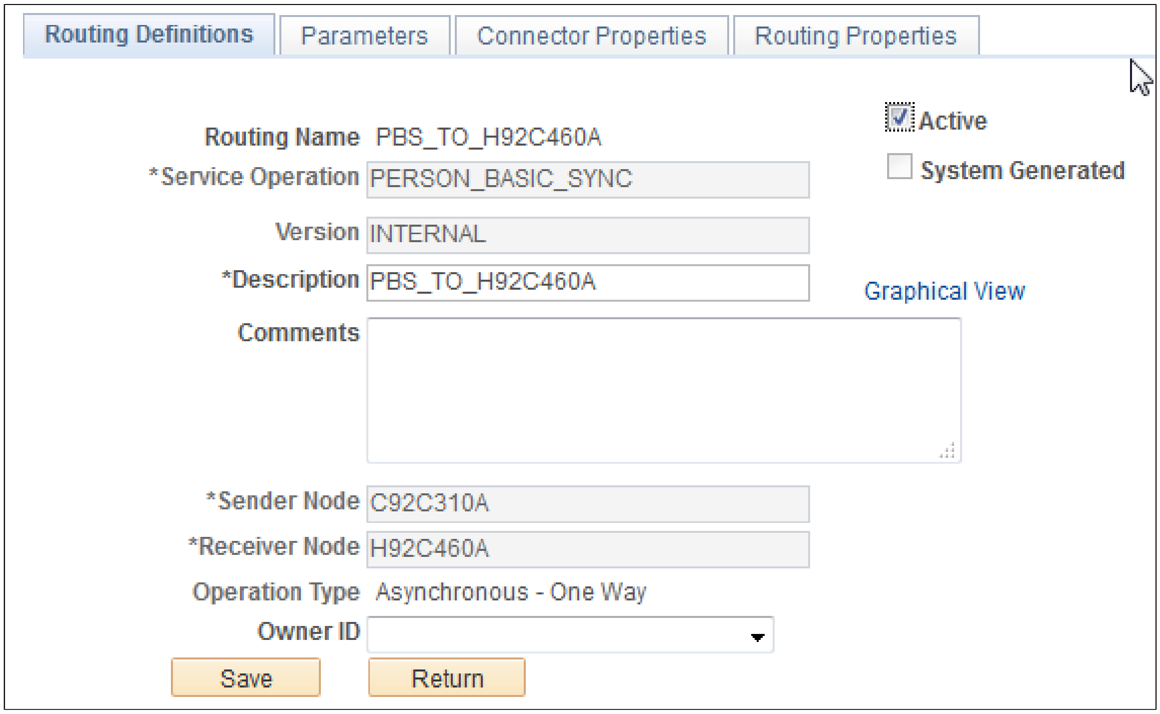
f. Click the Routings tab and add a new routing for the Service Operation by entering a value in the **Routing Name** field and clicking the **Add** button.

This example illustrates the fields and controls on the Routings page for PERSON_BASIC_SYNC.



g. Define a **Sender Node** and a **Receiver Node** on the Routings Definition page of the Routings component.

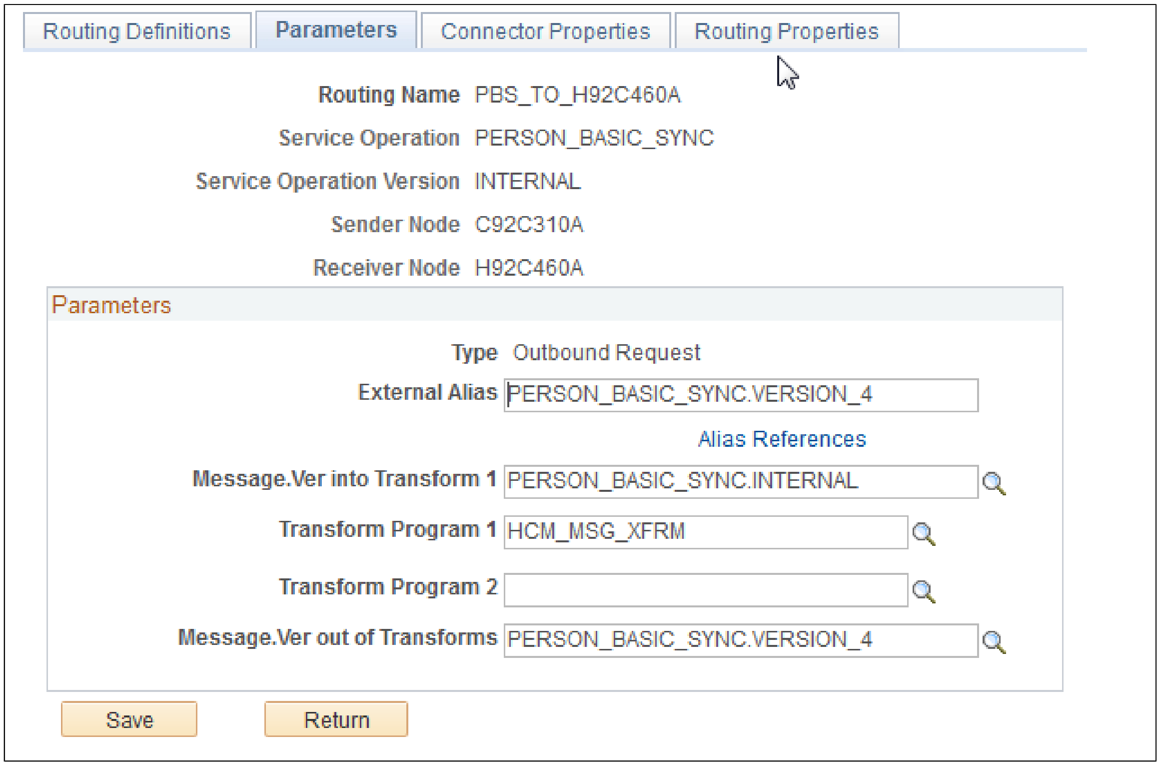
This example illustrates the fields and controls on the PERSON_BASIC_SYNC routing definition page. You can find definitions for the fields and controls later on this page.



h. Verify that the **Active** check box is checked.

i. Click the **Parameters** tab and set up the following:

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



Field or Control	*Description*
External Alias	Enter the external alias; for example, PERSON_BASIC_SYNC.VERSION_4.
Message.Ver into Transform 1	For example, PERSON_BASIC_SYNC.INTERNAL.
Transform Program	For example, HCM_MSG_XFRM.
Message.Ver out of Transforms	For example, PERSON_BASIC_SYNC.VERSION_4.

j. Click **Save** at the bottom of the Parameters page to save the routing.

k. Click **Return** at the bottom of the Parameters page to return to the Service Operation setup page.

l. Click **Save** at the bottom of any page in the Service Operations component to save the Service Operation.

3. Activate Message Queue.

a. Navigate to **PeopleTools** > **Integration Broker** > **Service Operations Monitor,** > **Administration** > **Queue Status**.

b. Scroll down the page until you find the relevant PERSON_DATA Queue Name.

c. Review the queue Status and activate the queue by clicking Run, if needed. The queue status should be set to *Running* before leaving this page.

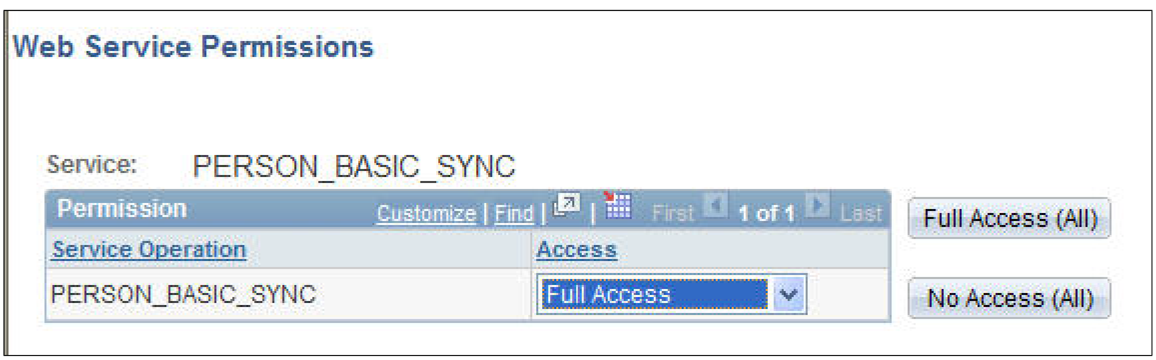
This example illustrates queue status for PERSON_DATA.

PAY_EXPENSES_ACKNOWLEDGE	Paused	Run
PAY_EXPENSES_ISSUE	Paused	Run
PAY_EXPENSES_REQUEST	Paused	Run
PERF_MEASUREMENT_SETUP	Paused	Run
PERSON_DATA	Paused	Run
PERSON_SETUP	Paused	Run
PERSON_TIME	Paused	Run
PM_CHANNEL	Running	Pause
PROCESS_SCHEDULER	Running	Pause
PROJECTS_SETUP	Paused	Run
PSHARING_PAYROLL_INTERFACE	Paused	Run
PSRF_REPORTING_FOLDERS	Running	Pause

Configuring HCM as the Target Database

1. Update security by adding the service operation to the required user's permission list.

This example illustrates the fields and controls on the Web Service Permissions page for the PERSON_BASIC_SYNC service.



a. Navigate to **PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists**.

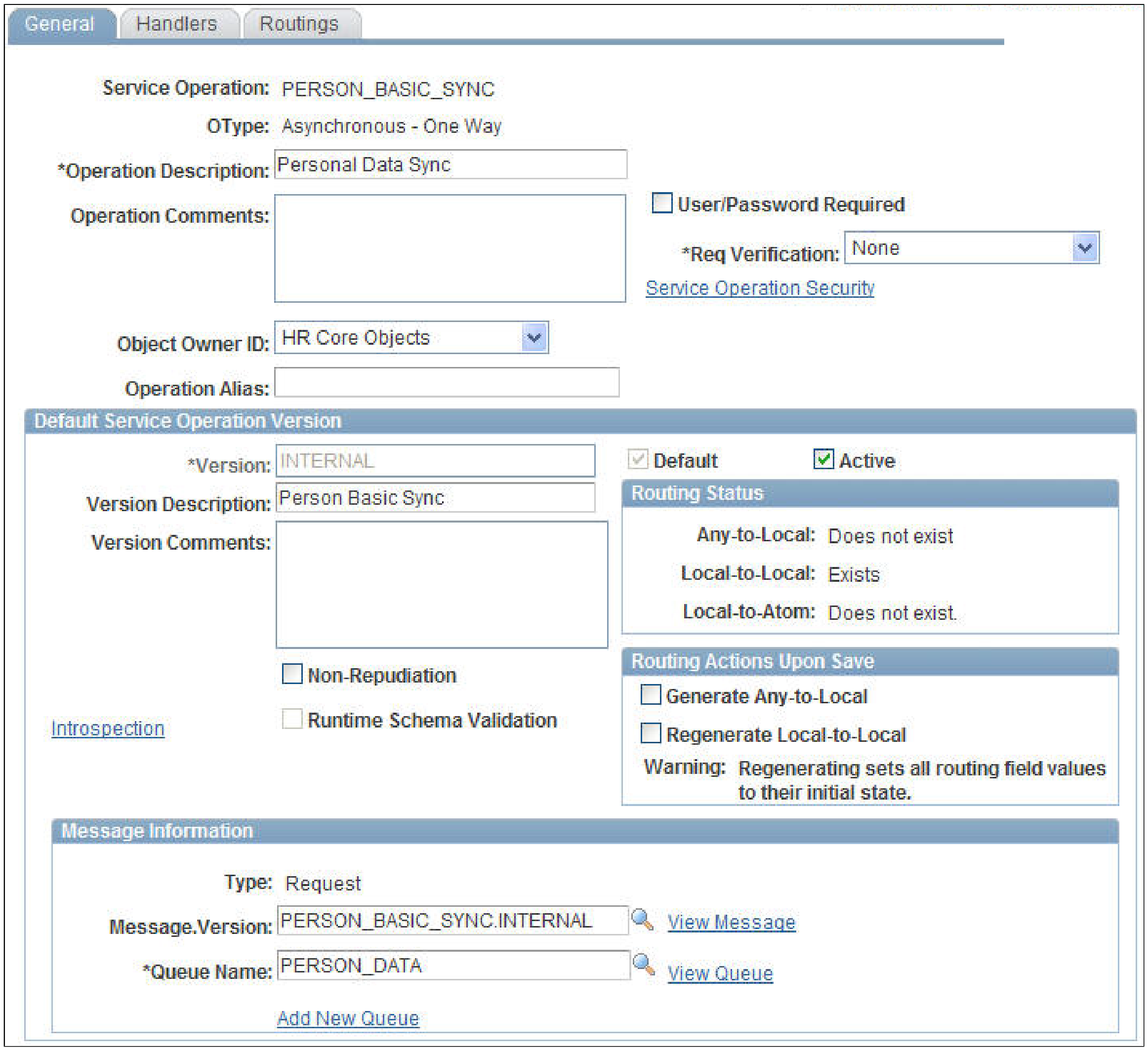
b. Select the relevant permission list from the search dialog box (primary permission list for the user).

c. Click the **Web Services** tab.

   d. Enter the corresponding Service(s) for the Service Operation(s) you want to leverage.
   e. Click the Edit link and add access to the relevant Service Operation(s) listed on the Web Service Permissions secondary page.
   f. Click **OK** to return to the Web Services page.
   g. Click **Save** to save the updated Permission List.

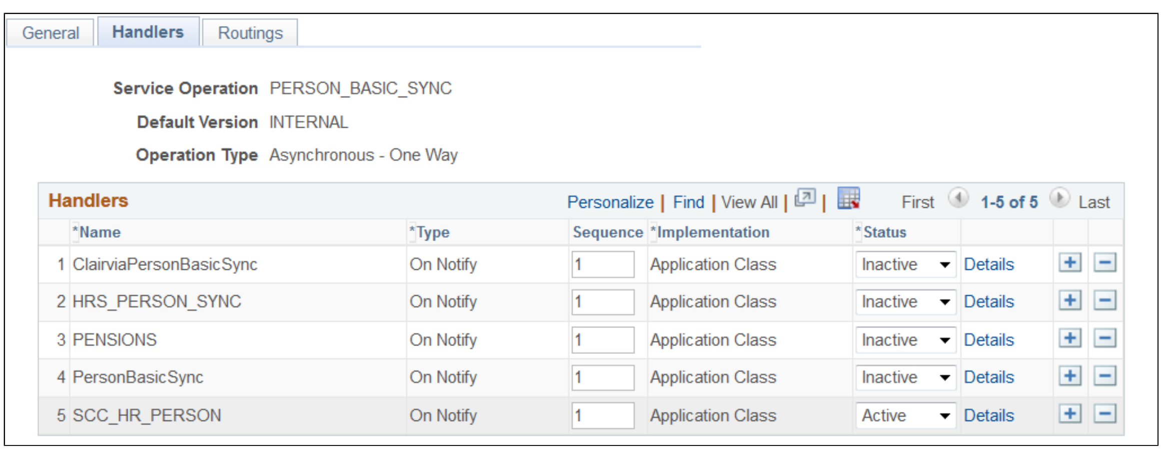
2. Activate Service Operation(s) and Create Routing(s) and Subscription Handler in HCM:
   a. Navigate to **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**.
   b. Select PERSON_BASIC_SYNC from the search dialog box.
   c. Check the **Active** check box on the General tab.
   d. Make note of the **Queue Name** field, as you need to verify that the PERSON_DATA Queue is in *Running* status later.

This example illustrates the fields and controls on the General page for the PERSON_BASIC_SYNC service operation in HCM.

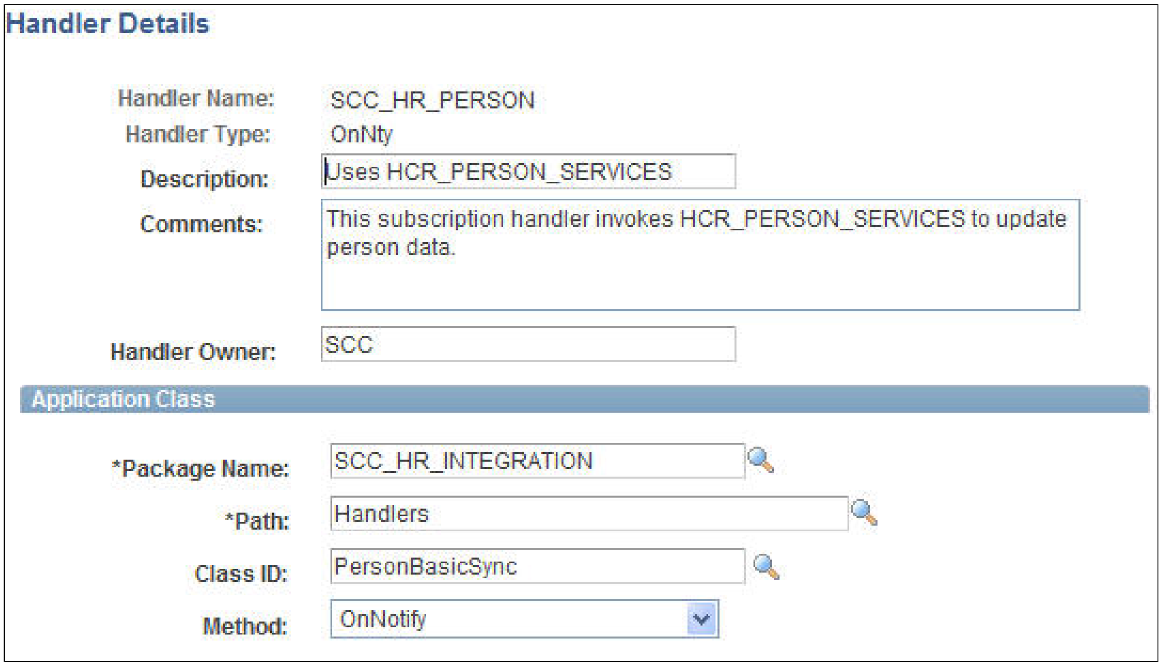


e. Click the Handlers tab. Set the SCC_HR_PERSON handler to *Active*.

This example illustrates the fields and controls on the Handlers page for the PERSON_BASIC_SYNC service operation in HCM.

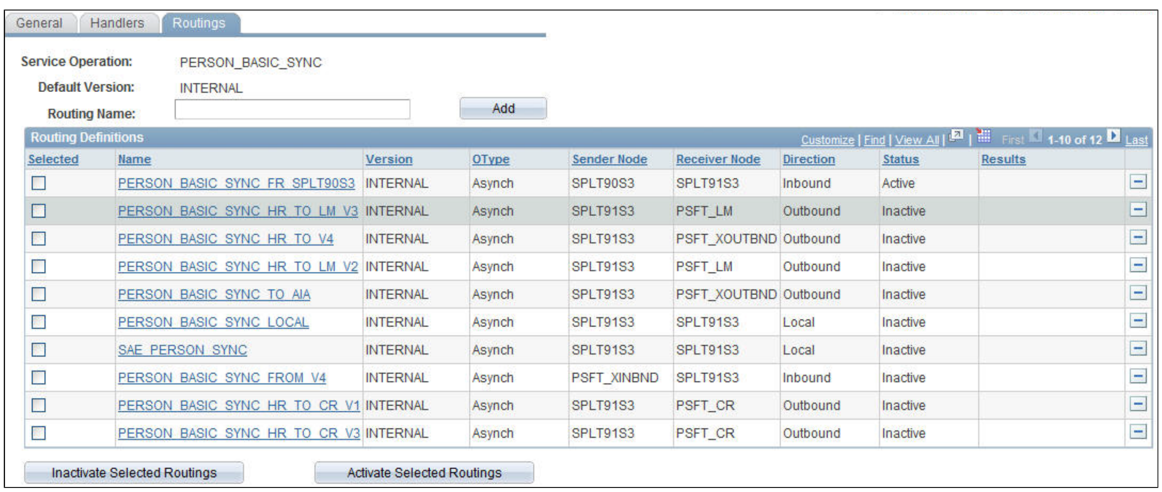


This example illustrates the fields and controls on the Handler Details page for the SCC_HR_PERSON handler in HCM.



f. Select the Routings tab and add a new routing for the Service Operation by entering a value in the **Routing Name** field and clicking the **Add** button.

This example illustrates the fields and controls on the Routings page for the PERSON_BASIC_SYNC service operation in HCM.

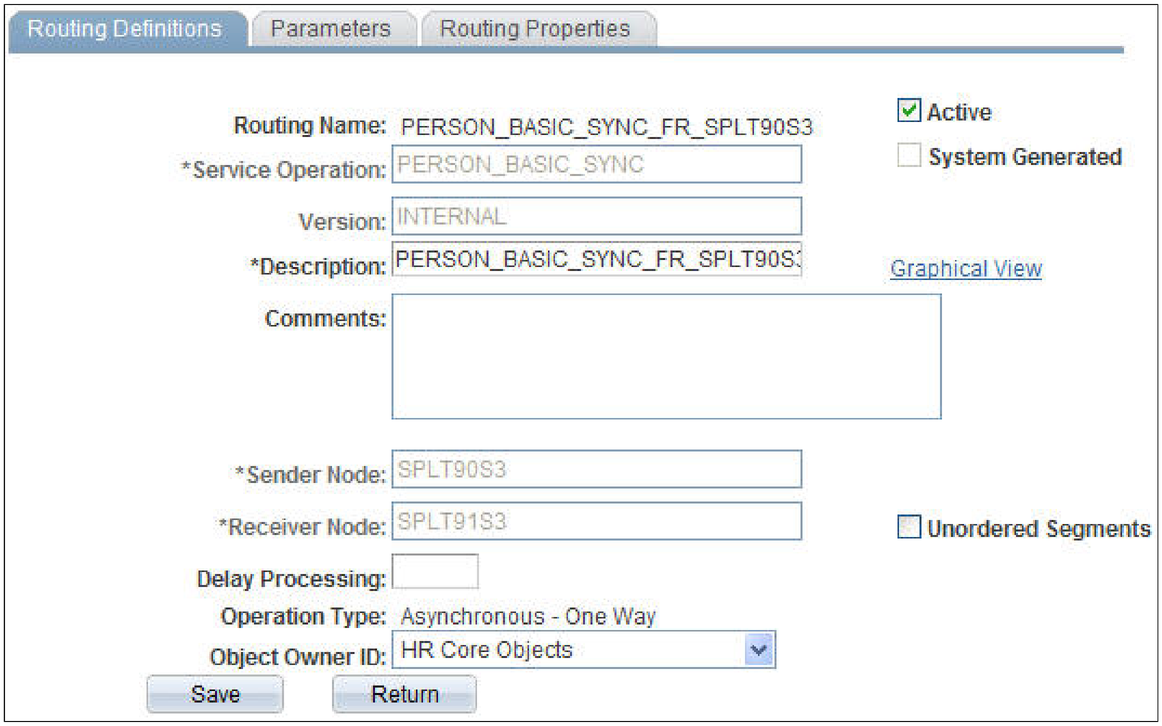


Selected	Name	Version	OType	Sender Node	Receiver Node	Direction	Status	Results
☐	PERSON_BASIC_SYNC_FR_SPLT90S3	INTERNAL	Asynch	SPLT90S3	SPLT91S3	Inbound	Active	
☐	PERSON_BASIC_SYNC_HR_TO_LM_V3	INTERNAL	Asynch	SPLT91S3	PSFT_LM	Outbound	Inactive	
☐	PERSON_BASIC_SYNC_HR_TO_V4	INTERNAL	Asynch	SPLT91S3	PSFT_XOUTBND	Outbound	Inactive	
☐	PERSON_BASIC_SYNC_HR_TO_LM_V2	INTERNAL	Asynch	SPLT91S3	PSFT_LM	Outbound	Inactive	
☐	PERSON_BASIC_SYNC_TO_AIA	INTERNAL	Asynch	SPLT91S3	PSFT_XOUTBND	Outbound	Inactive	
☐	PERSON_BASIC_SYNC_LOCAL	INTERNAL	Asynch	SPLT91S3	SPLT91S3	Local	Inactive	
☐	SAE_PERSON_SYNC	INTERNAL	Asynch	SPLT91S3	SPLT91S3	Local	Inactive	
☐	PERSON_BASIC_SYNC_FROM_V4	INTERNAL	Asynch	PSFT_XINBND	SPLT91S3	Inbound	Inactive	
☐	PERSON_BASIC_SYNC_HR_TO_CR_V1	INTERNAL	Asynch	SPLT91S3	PSFT_CR	Outbound	Inactive	
☐	PERSON_BASIC_SYNC_HR_TO_CR_V3	INTERNAL	Asynch	SPLT91S3	PSFT_CR	Outbound	Inactive	

g. Enter the CS **Sender Node** and an HCM **Receiver Node** on the Routings Definition page of the Routings component.

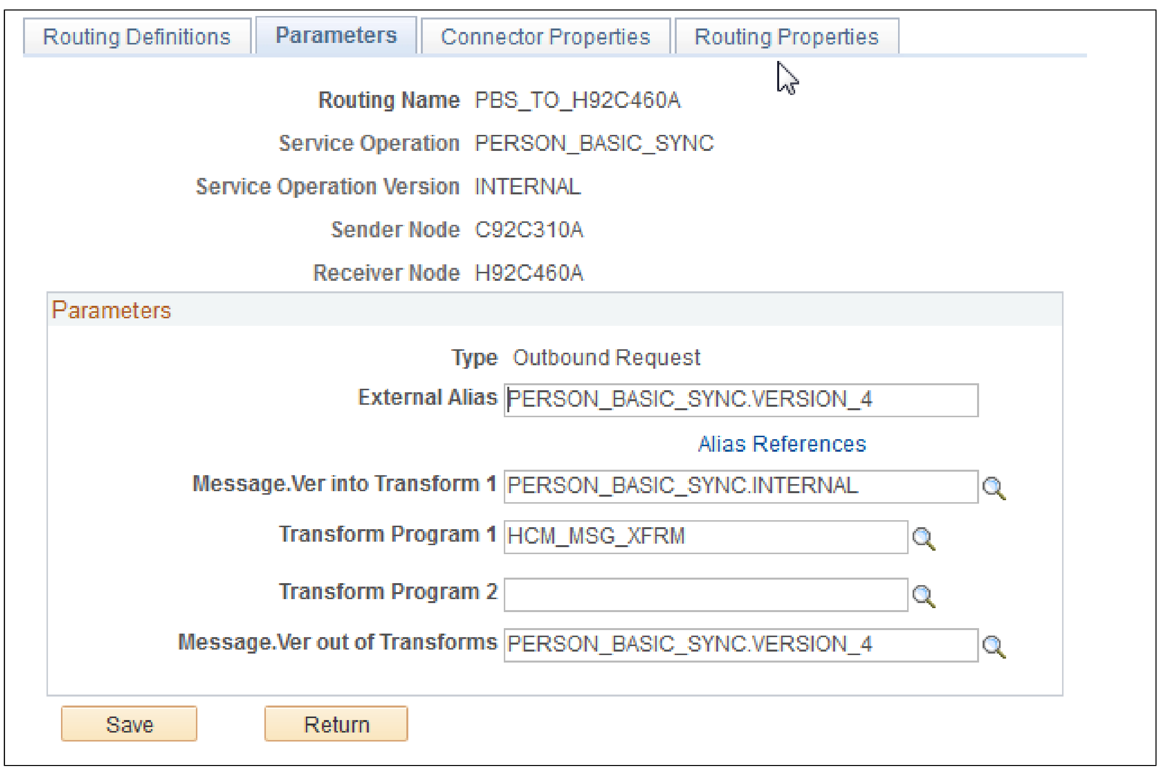
h. Verify that the **Active** check box is checked.

This example illustrates the fields and controls on the Routing Definitions page for the PERSON_BASIC_SYNC service operation in HCM.



i. Select the Parameters tab and set the following:

This example illustrates the fields and controls on the routing Parameters page for the PERSON_BASIC_SYNC service operation in HCM.



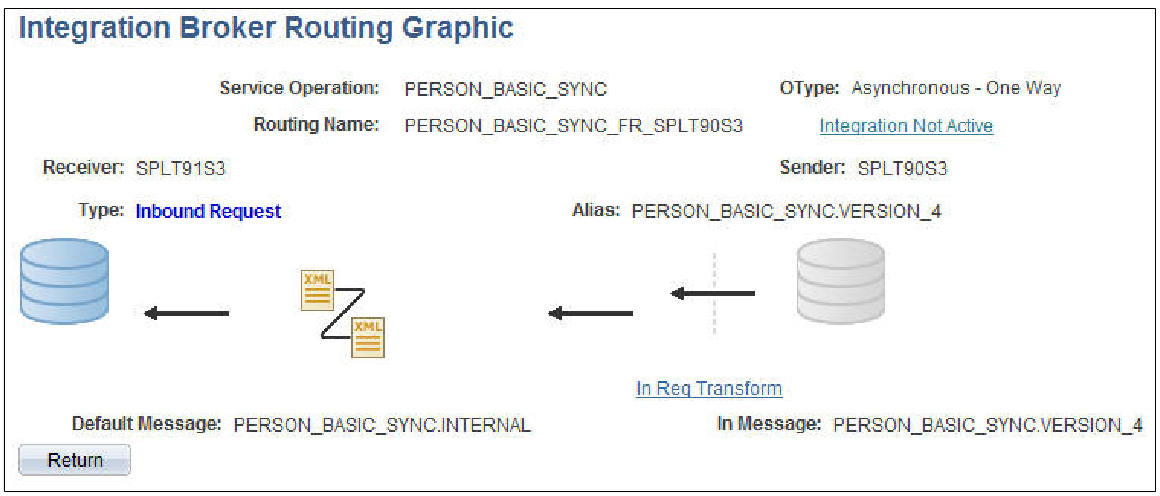
Field or Control	*Description*
External Alias	Enter the external alias; for example, PERSON_BASIC_SYNC.VERSION_4.
Message.Ver into Transform 1	For example, PERSON_BASIC_SYNC.INTERNAL.
Transform Program	For example, HCM_MSG_XFRM.
Message.Ver out of Transforms	For example, PERSON_BASIC_SYNC.VERSION_4.

j. Click **Save** at the bottom of the Parameters page to save the routing.

k. Click **Return** at the bottom of the Parameters page to return to the Service Operation setup page.

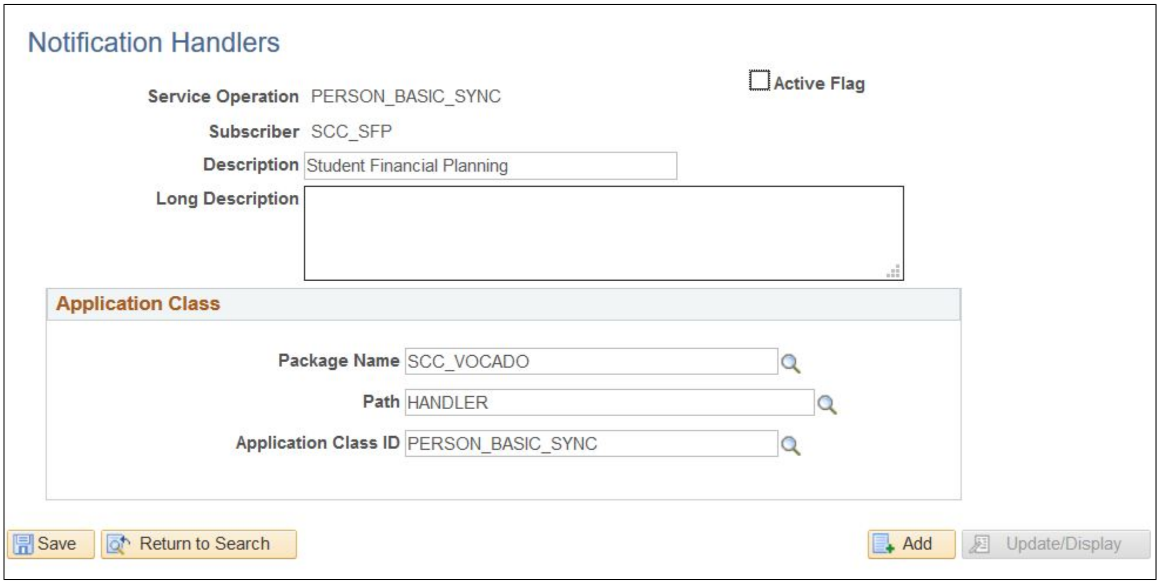
l. Click **Save** at the bottom of any page in the Service Operations component to save the Service Operation.

This example illustrates Integration Broker inbound request routing for PERSON_BASIC_SYNC.



CS/SFP Integration: When PERSON_BASIC_SYNC is subscribed (local-to-local routing), it runs a subscription handler that invokes a POST FasStudentUpdateEvent to SFP. The Notification Handler `SCC_SFP` must be set to Active.

Notification handler for biographic or demographic updates



Understanding Person Data FullSync and Sync Service Operations and Handlers

The following table summarizes the FullSync and Sync Service Operations, and the Subscription Handler that you should use to configure your CS-HCM person bio-demo data integrations.

Service Name	***Queue***	***Subscription Handler App Package***
PERS_POI_FULLSYNC.VERSION_1	PERSON_DATA	PersPoiFullSync PERSPOIFULLSYNC/PersPoiFullSync/OnNotify
PERS_POI_SYNC.VERSION_1	PERSON_DATA	PersPoiSync PERSPOISYNC/PersPoiSync/OnNotify
PERSON_BASIC_FULLSYNC.VERSION_4	PERSON_DATA	PersonBasicFullsync PERSON_BASIC_FULLSYNC/PersonBasicFullSync/OnNotify
PERSON_BASIC_SYNC.VERSION_4	PERSON_DATA	SCC_HR_PERSON SCC_HR_PERSON/PersonBasicSync/OnNotify

Service Name	***Queue***	***Subscription Handler App Package***
PERSON_DISABILITY_FULLSYNC.VERSION_2	PERSON_DATA	ONNOTIFY PERSON_DISABILITY_FULLSYNC/PersonDisabilityFullsync/OnNotify
PERSON_DISABILITY_SYNC.VERSION_2	PERSON_DATA	ONNOTIFY PERSON_DISABILITY_SYNC/PersonDisabilitySync/OnNotify
PERSON_DIVERSITY_FULLSYNC.VER SION_2	PERSON_DATA	PersonDiversityFullSync PERSON_DIVERSITY_FULLSYNC/PersonDiversityFullsync/On Notify
PERSON_DIVERSITY_SYNC.VERSION_2	PERSON_DATA	PersonDiversitySync PERSON_DIVERSITY_SYNC/PersonDiversitySync/OnNotify
PERSON_VISA_CITIZEN_FULLSYNC1.VERSION_1	PERSON_DATA	ONNOTIFY PERSON_VISA_CITIZEN_FULLSYNC1/PersonVisaCitizenFullSync1/OnNotify
PERSON_VISA_CITIZEN_FULLSYNC2.VERSION_1	PERSON_DATA	ONNOTIFY PERSON_VISA_CITIZEN_FULLSYNC2/PersonVisaCitizenFullSync2/OnNotify
PERSON_VISA_CITIZEN_SYNC.VERSION_2	PERSON_DATA	ONNOTIFY PERSON_VISA_CITIZEN_SYNC/PersonVisaCitizenSync/OnNotify
WORKFORCE_FULLSYNC.VERSION_3	PERSON_DATA	WorkforceFullSync WORKFORCE_FULLSYNC/WorkforceFullSync/OnNotify
WORKFORCE_SYNC.VERSION_3	PERSON_DATA	WorkforceSync WORKFORCE_SYNC/WorkforceSync/OnNotify

Integrating Setup Data

This topic discusses how to:

- Understand setup data integration.
- Configure web services for setup data.
- Understand the setup data loading sequence.
- Use delivered EIPs.

Note: Documentation relevant to Campus Solutions and Human Capital Management integration is available on My Oracle Support (ID 2091799.2).

Understanding Setup Data Integration

In all integration configurations, some setup data underlies all person transactions. This setup data needs to be synchronized between the HCM instance and CS. The following list is of the data integrated in one direction, from HCM to CS:

- Address Types
- National ID Types
- Ethnic Groups
- HCM Business Units
- Currency Codes
- Company Codes
- Major Subject Codes
- Country Codes
- State Codes
- Departments
- Holiday Date Schedules
- Job Codes
- Locations
- Schools
- Majors
- Name Titles
- Name Types

- Name Prefixes
- Name Royal Prefixes
- Name Royal Suffixes
- Name Suffixes
- Name Formats
- POI Types
- Regulatory Regions
- Regional Transactions
- SetIDs
- TableSet Controls
- U.S. Standard Occupational Codes
- Visa Permit Types
- Visa Permit Documents

Configuring Web Services for Setup Data

Oracle delivers several EIPs to automate the process of synchronizing setup data between CS and HCM; this ensures that the setup data underlying the transactional data remains in sync. Other delivered EIPs enable your institution to integrate data in support of External Search/Match and core business processes.

Note that person data EIPs are designated sync or fullsync. Fullsync EIPs republish all the data in their source records at once. Incremental sync EIPs send real-time sync messages; as soon as you make a change in the database of record, the system triggers the sync and sends only the changed information to the other database. This section discusses how to configure FullSync Service Operations.

See Configuring Web Services for Person Data

Configuring Full Sync Service Operations

The following steps for setting up and activating each FullSync service operation in Integration Broker must be performed on the source and target databases.

Source Database Configuration Tasks

Note: These source database configuration instructions are for an HCM 9.1/9.2 database on PeopleTools 8.54.

---

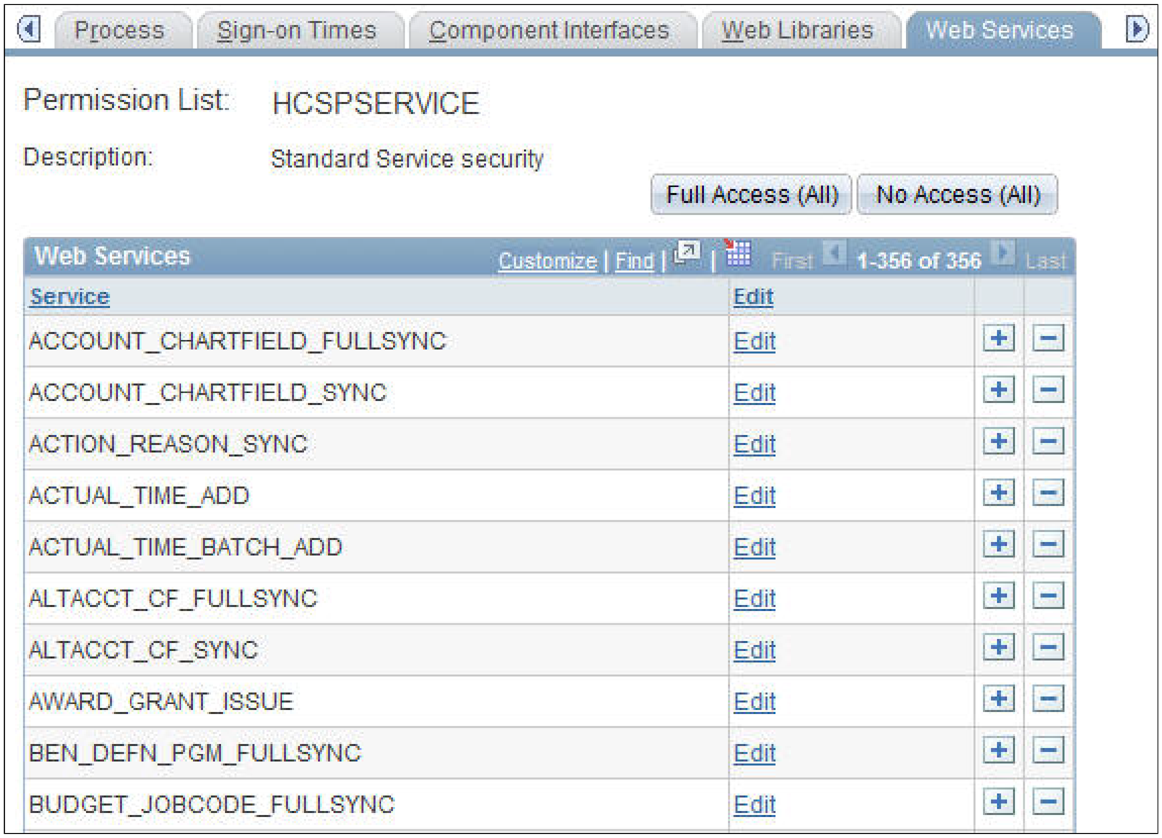
1. Update security by adding the Service Operation(s) to your primary permission list:
   a. Navigate to **PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists.**
   b. Select the relevant permission list from the search dialog box.

c. Select the **Web Services** tab.

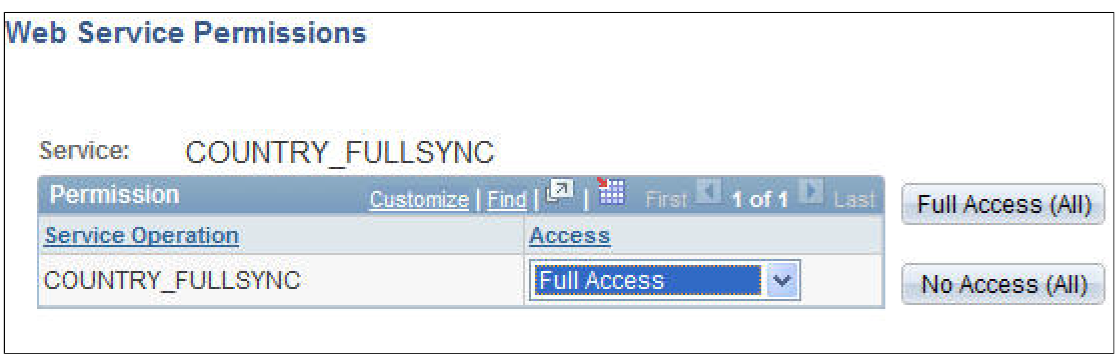
d. Enter the corresponding Service(s) for the Service Operation(s) you wish to use.

e. Click the **Edit** link. On the Web Service Permissions secondary page, add access to the relevant Service Operation(s) listed by selecting the **Full Access** option for the **Access** column.

This example illustrates the fields and controls on the Web Services page-Permission List.



This example illustrates the fields and controls on the Web Services Permissions page for HCM.



2. Activate Service Operations and create Routings.

a. Navigate to **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations.**

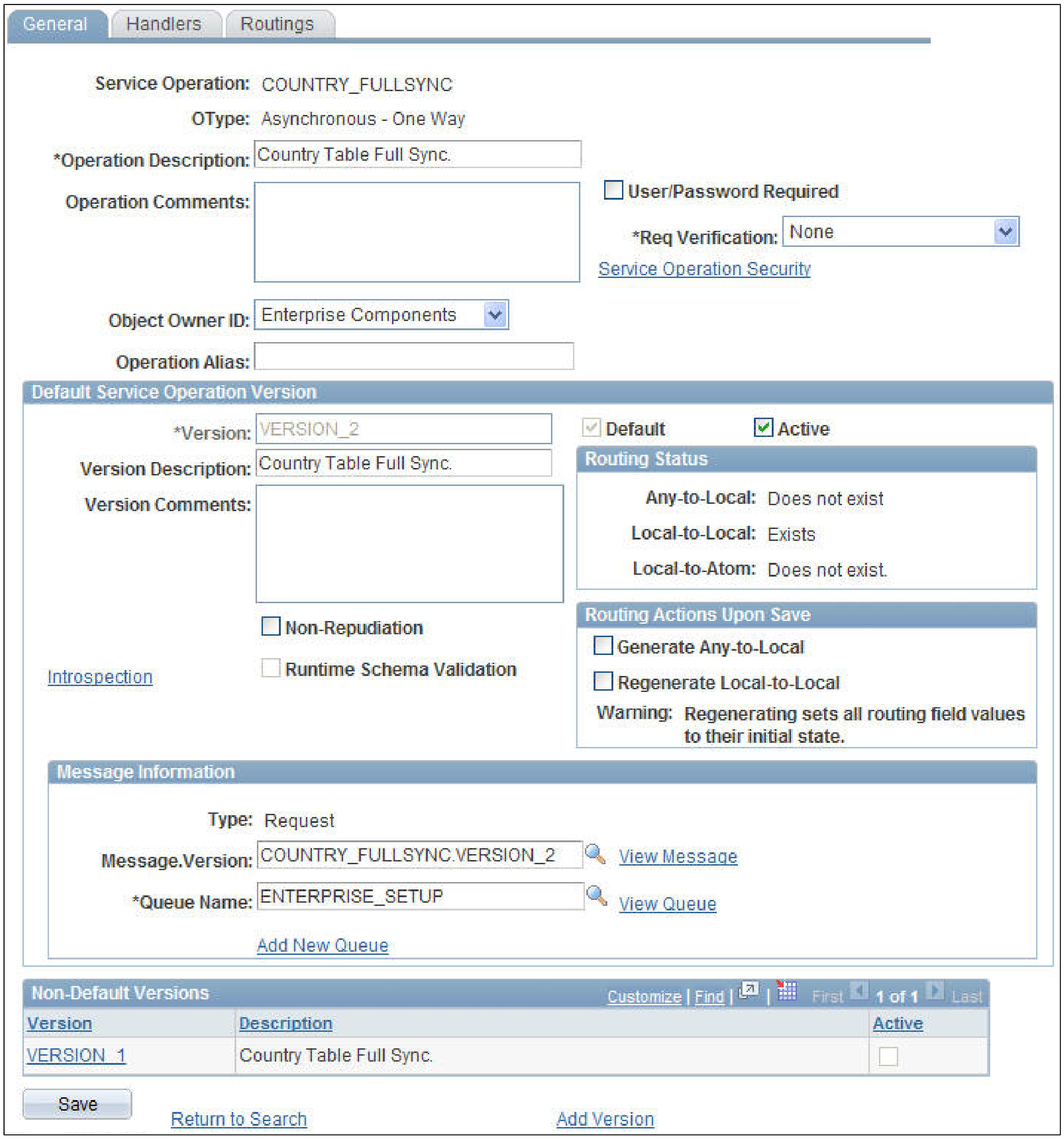
b. Select the relevant Service Operation(s) from the search dialog box.

c. Check the **Active** check box on the **General** tab.

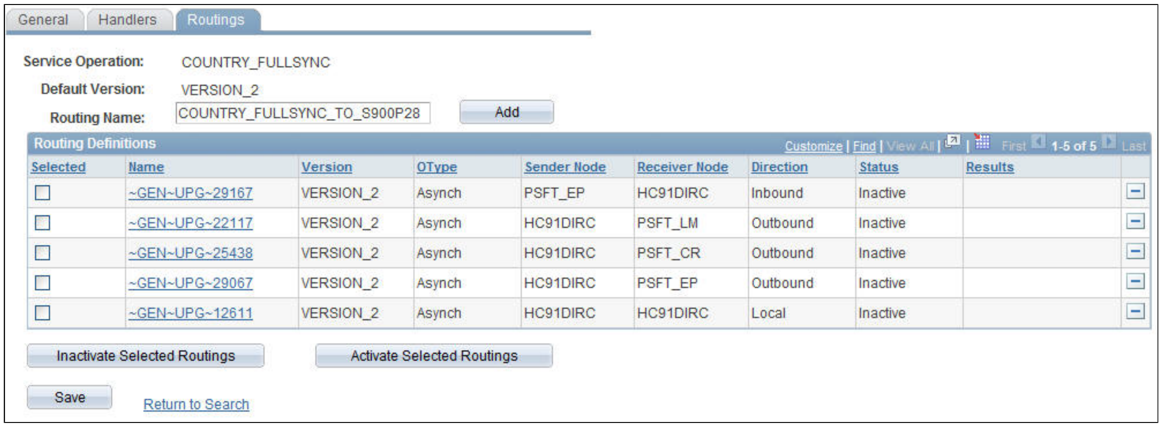
d. Make note of the **Queue Name** field, as you need to verify later that the Queue status is *Running*.

e. Select the **Routings** tab and add a new routing for the Service Operation by entering a value in the **Routing Name** field and clicking the **Add** button.

This example illustrates the fields and controls on the General page for the COUNTRY_FULLSYNC service operation.



This example illustrates the fields and controls on the Routings page for the COUNTRY_FULLSYNC service operation.



f. Enter a Sender Node and a Receiver Node on the Routings Definition page of the Routings component.

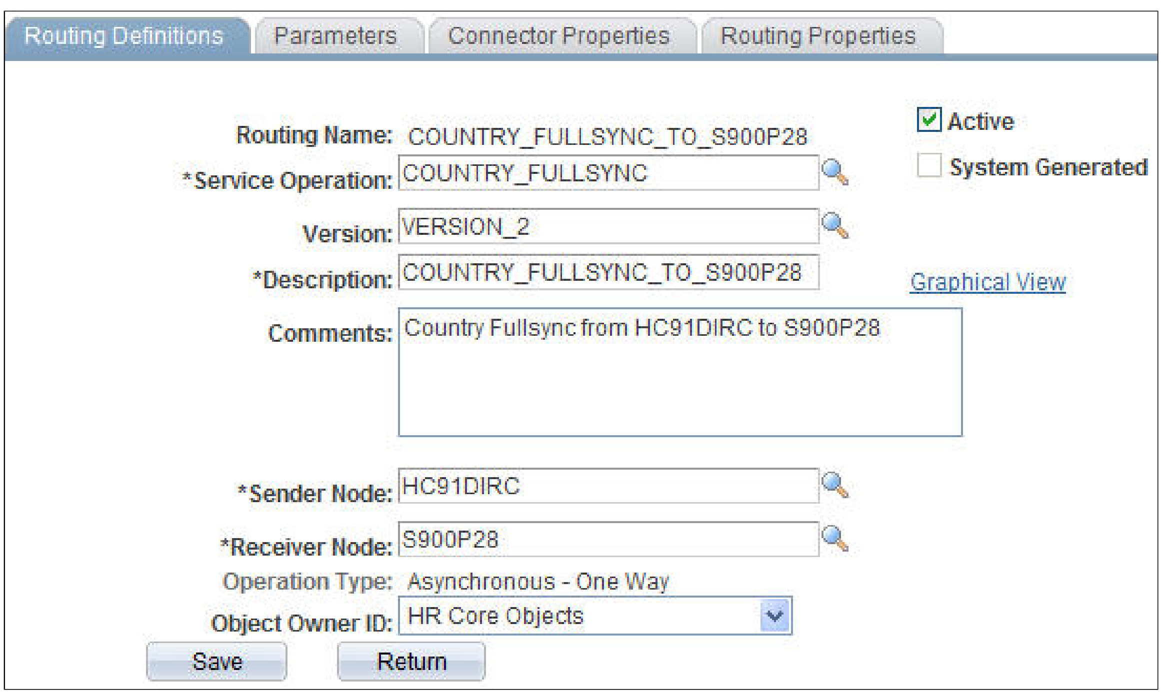
g. Verify that the **Active** check box is checked.

h. Save the routing.

i. Click the **Return** button at the bottom of the Routings Definition page to return to the Service Operation setup component.

j. Click **Save** at the bottom of any page in the Service Operations component to save the Service Operation.

This example illustrates the fields and controls on the Routing Definitions page for the COUNTRY_FULLSYNC service operation.



3. Activate Message Queue.

   a. Navigate to **PeopleTools** > **Integration Broker** > **Service Operations Monitor** > **Administration** > **Queue Status**

   b. Scroll down the page to find the relevant Queue Name (from the Service Operation setup page noted earlier).

   c. Review the queue Status and activate the queue by clicking the **Run** button if needed. Before leaving this page, ensure that queue status is set to *Running.*

Target Database Configuration Tasks

Note: These target database configuration instructions are for a CS 9.2 database on PeopleTools 8.54.

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1. Update security by adding the service operation to the required user's permission list.

   a. Navigate to **PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists.**

   b. Select the relevant permission list from the search dialog box (primary permission list for the user).

   c. Select the Web Services tab.

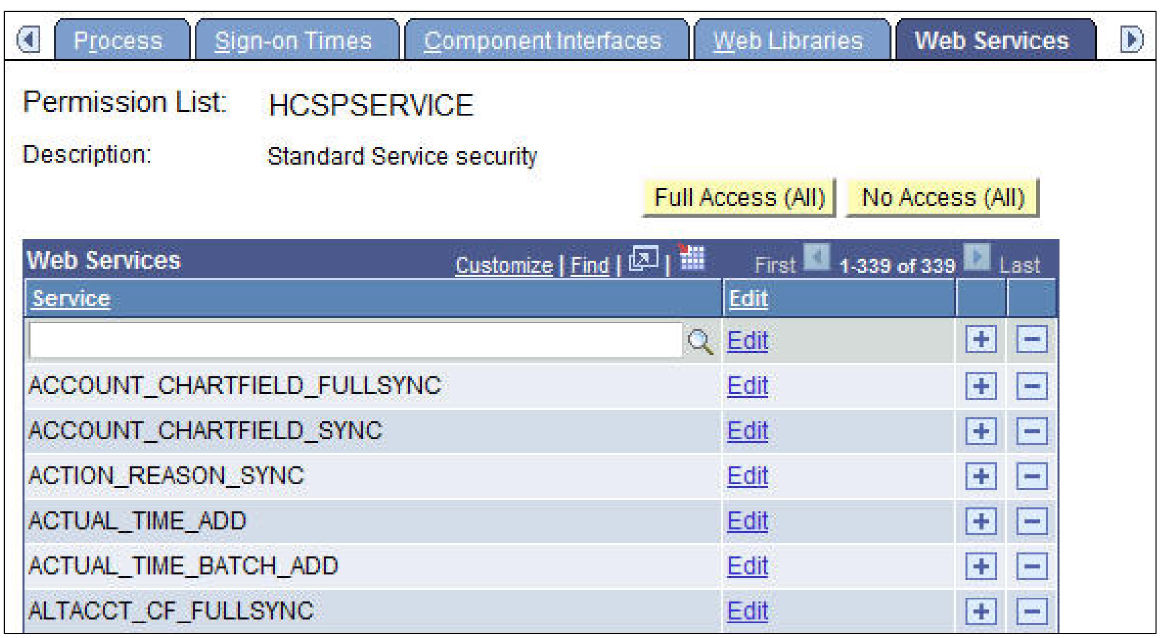
   d. Enter the corresponding Service(s) for the Service Operation(s) you wish to leverage.

   e. Click the **Edit** link and add access to the relevant Service Operation(s) listed on the Web Service Permissions secondary page.

   f. Click **OK** to return to the Web Services page.

   g. Click **Save** to save the updated Permission List.

   This example illustrates the fields and security controls on the Web Services page.



This example illustrates the fields and security controls on the Web Service Permissions page in Campus Solutions.

2. Activate Service Operation and Create Routing.

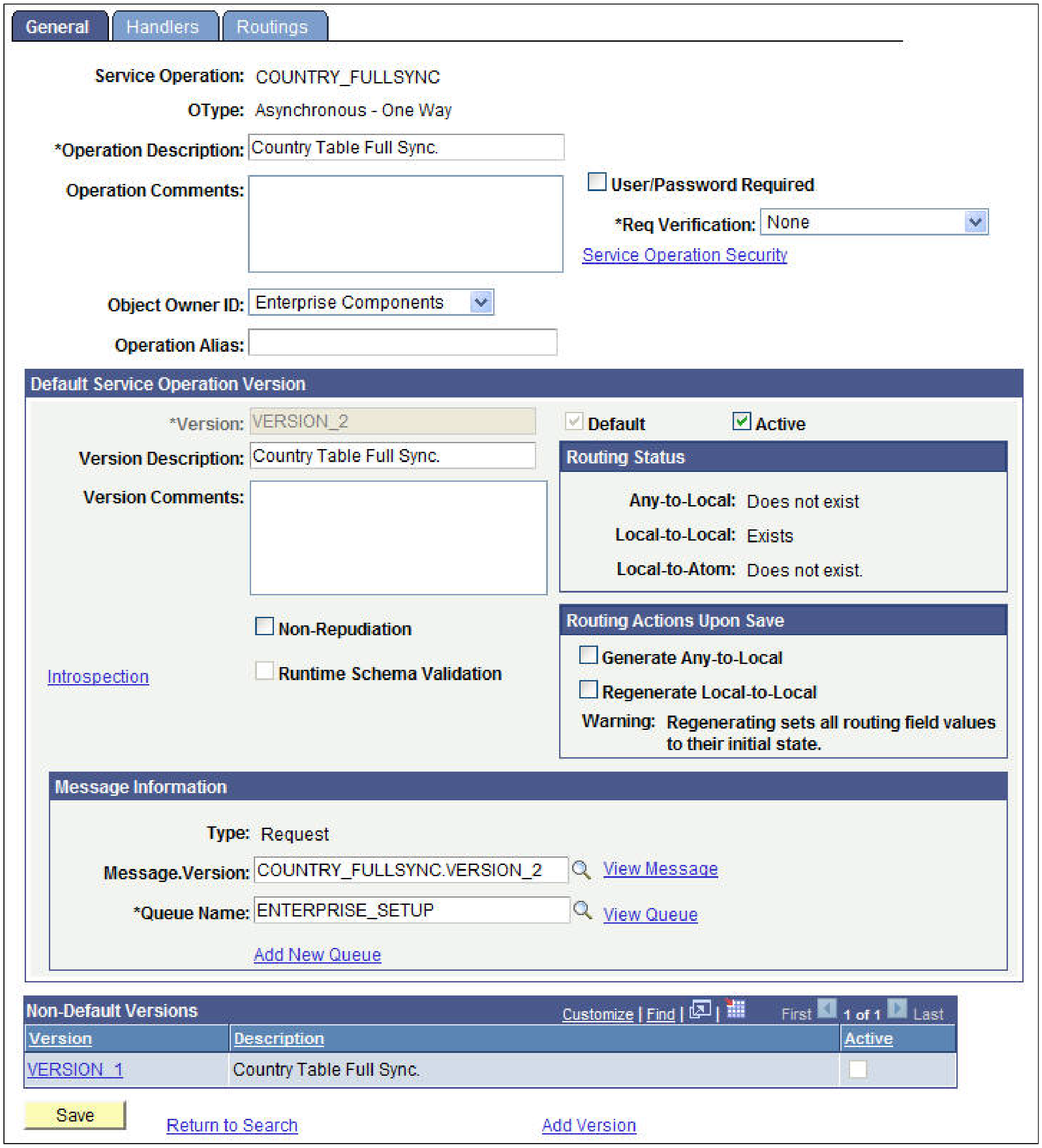
   a. Navigate to **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**.

   b. Select the relevant Service Operation(s) from the search dialog box.

   c. Select the **Active** check box on the General tab.

   d. Make note of the **Queue Name** field, as you need to verify later that the Queue status is *Running*.

This example illustrates the fields and controls on the General page for the COUNTRY_FULLSYNC service operation.



e. Select the Routings tab and add a new routing for the Service Operation.

f. Enter a **Sender Node** and a **Receiver Node** on the Routings Definition page of the Routings component.

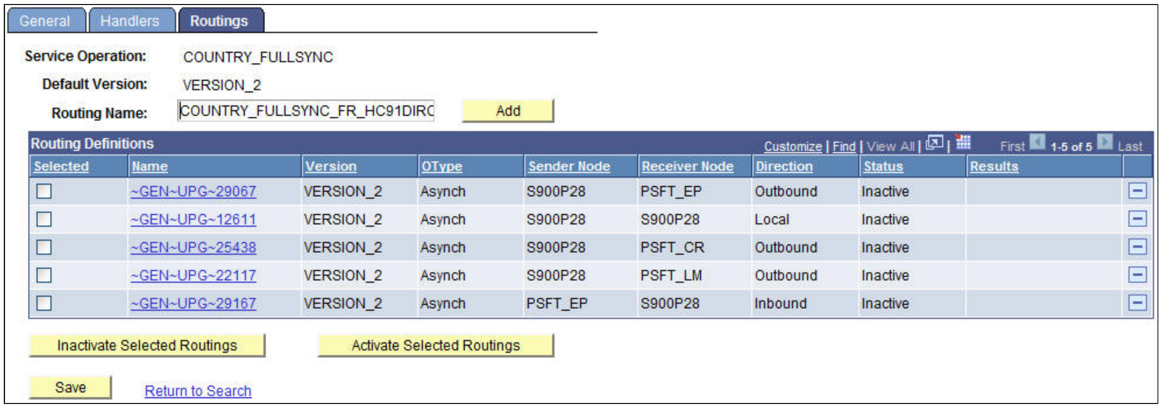
g. Verify that the **Active** check box is checked.

h. Click **Save** at the bottom of the Routings Definition page to save the routing.

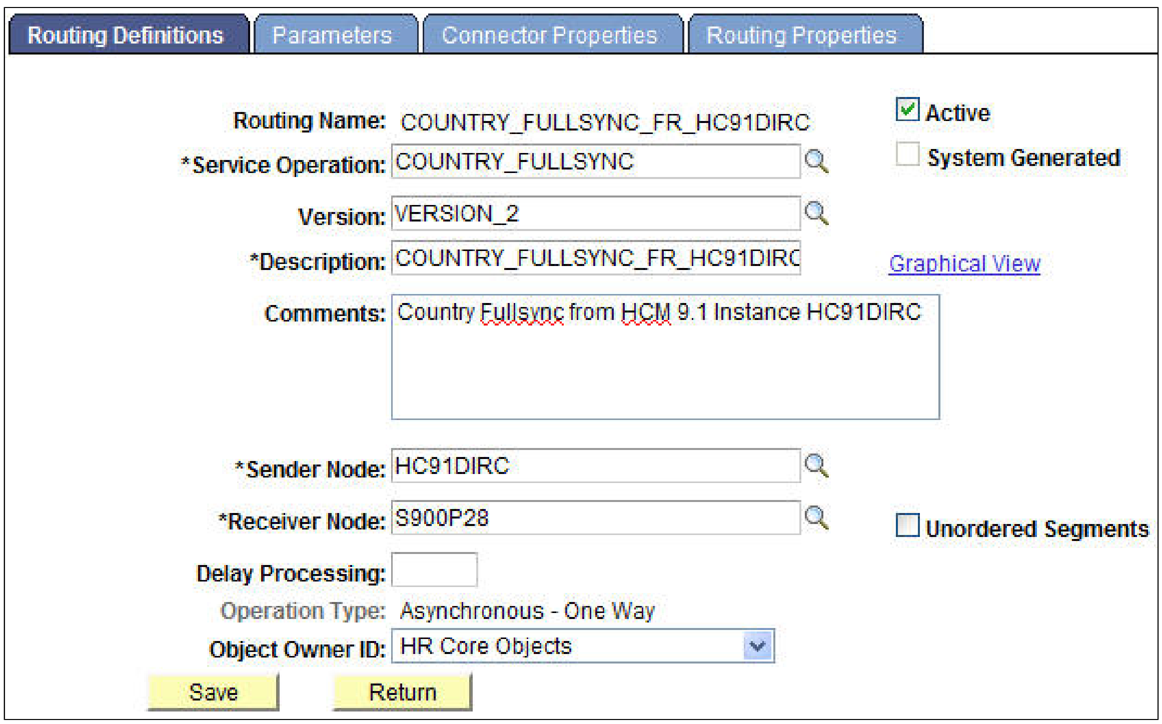
i. Click the **Return** at the bottom of the Routings Definition page to return to the Service Operation setup component.

j. Click **Save** at the bottom of any page in the Service Operations component to save the Service Operation.

This example illustrates the fields and controls on the Routings page for the COUNTRY_FULLSYNC service operation.



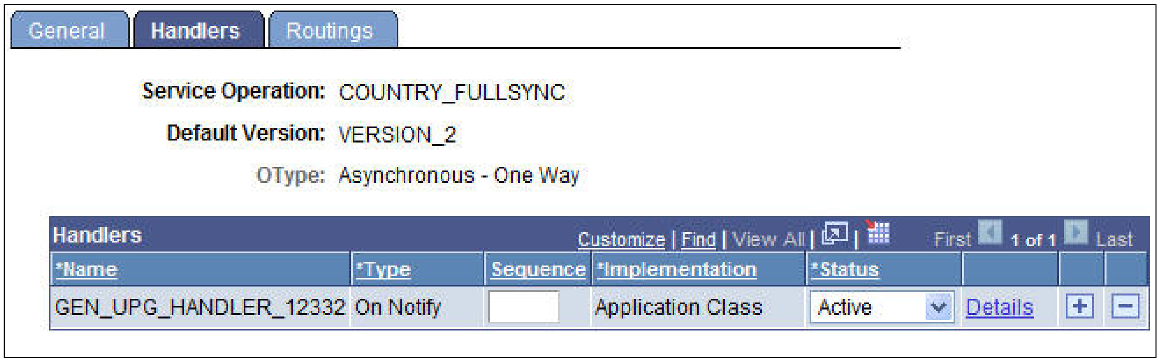
This example illustrates the fields and controls on the Routing Definitions page for the COUNTRY_FULLSYNC service operation.



3. Activate or create the required Service Operations OnNotify handler.

a. Click the Handlers tab of the Service Operations component and set up the following:

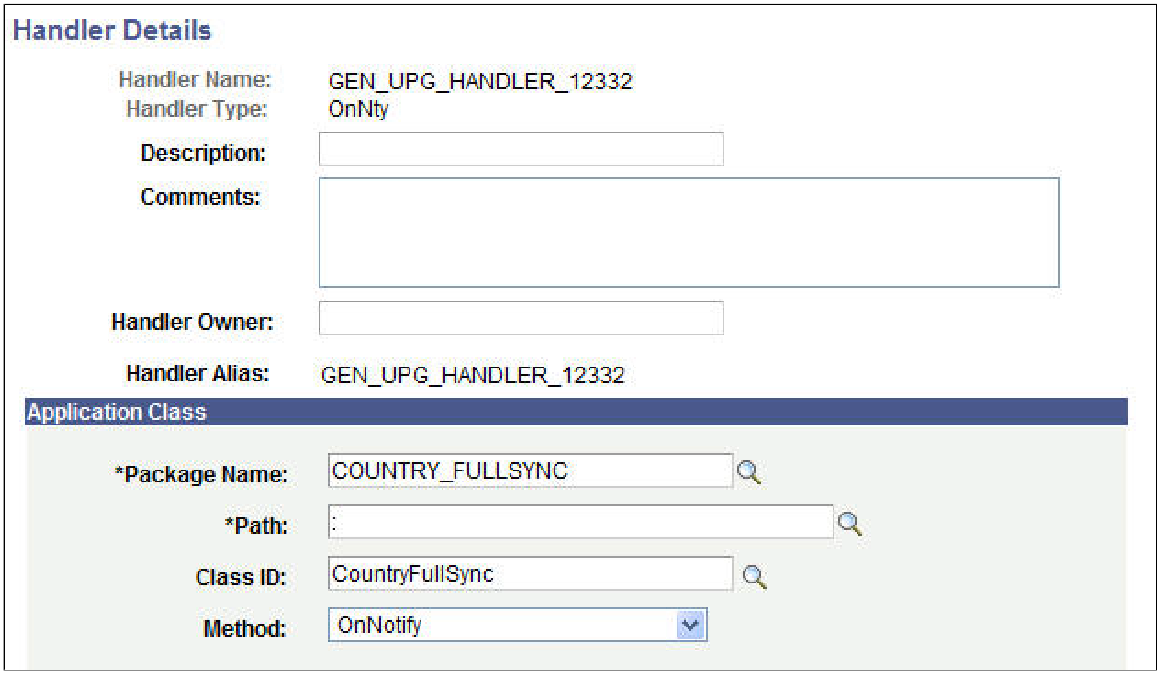
This example illustrates the fields and controls on the Handlers page for the COUNTRY_FULLSYNC service operation.



Field or Control	Description
Name	Enter a Handler Name if one does not exist. For example, *BusUnitHRFullSync*. See the *Full Sync Service Operations* table (Application Package Name/ Class/ Method column) for the required value for this field.
Type	OnNotify
Implementation	Application Class
Status	Active

b. Click the **Details** link and set up the following:

This example illustrates the fields and controls on the Handler Details page.



Field or Control	***Description***
Package Name	For example, *GEN_UPG_HANDLER_12332*. See the FullSync Service Operations table (Application Package Name/ Class/ Method column) for the required value for this field.
Path	*:*
Class ID	For example, *CountryFullSync*. See the FullSync Service Operations table (Application Package Name/ Class/ Method column) for the required value for this field.
Method	OnNotify

c. Click **OK** to return to the Handlers setup page.

d. Click **Save** at the bottom of the Handlers page to save your changes.

4. Activate Message Queue.

   a. Navigate to **PeopleTools** > **Integration Broker** > **Service Operations Monitor** > **Administration** > **Queue Status.**

   b. Scroll down the page to find the relevant Queue Name (from the Service Operation setup page noted earlier).

c. Review the queue **Status** and activate the queue by clicking **Run** if needed.

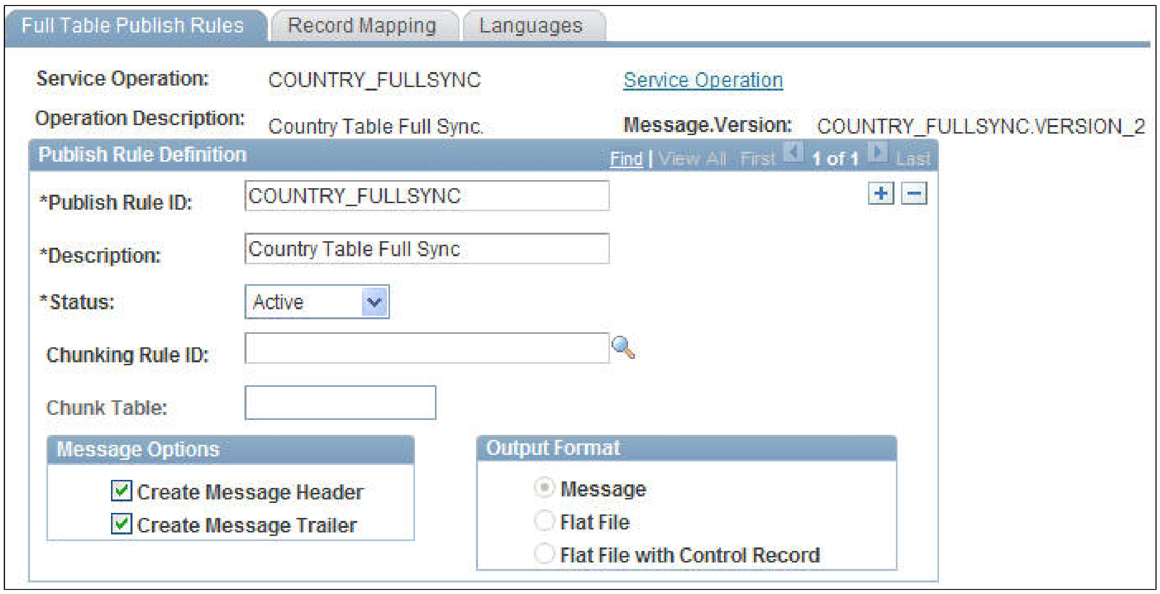
Executing the Full Data Publish Utility

Run the Full Data Publish process to synchronize data between your HCM and CS systems.

1. Define Full Data Publish Rules.

   a. Navigate to**Enterprise Components** > **Integration Definitions** > **Full Data Publish Rules,**and set up the following:

   This example illustrates the fields and controls on the Full Table Publish Rules page for the COUNTRY_FULLSYNC service operation.



Field or Control	***Description***
Message Name	Name of the Service Operation.
Publish Rule ID	Enter a publish rule ID.
Description	Enter a description of the Publish Rule.
Status	Set to *Active.*

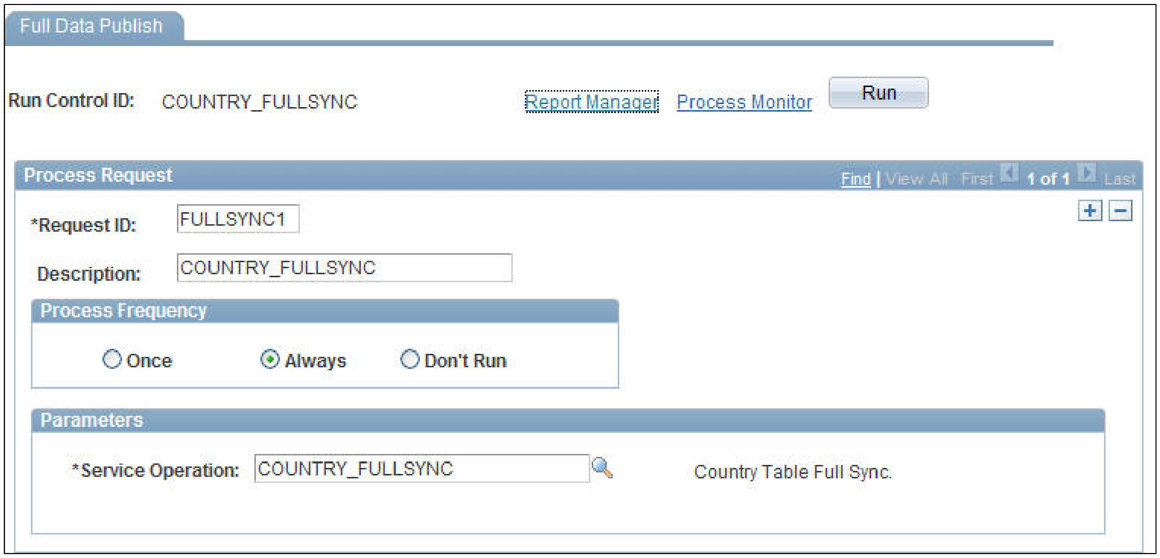
   b. Check the **Create Message Header** and **Create Message Trailer** check boxes.

   c. Save the page.

2. Execute the Full Data Publish Process.

a. Navigate to **Enterprise Components** > **Integration Definitions** > **Initiate Processes,** and set up the following:

This example illustrates the fields and controls on the Full Data Publish page.

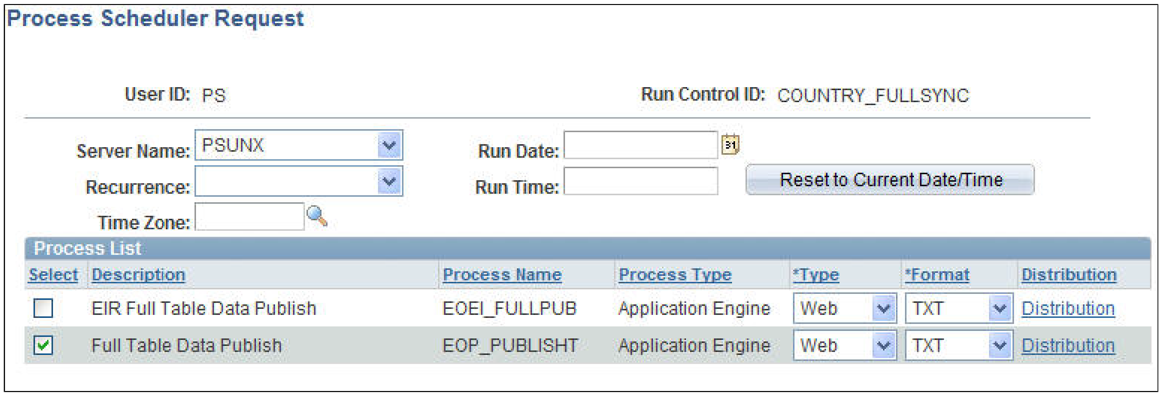


Field or Control	*Description*
Run Control ID	Create a new Run Control ID.
Request ID	Enter a Request ID.
Process Frequency	Select **Always.**
Parameters	Select the existing Service Operation, for example, COUNTRY_FULLSYNC.

b. Save the page and click **Run**.

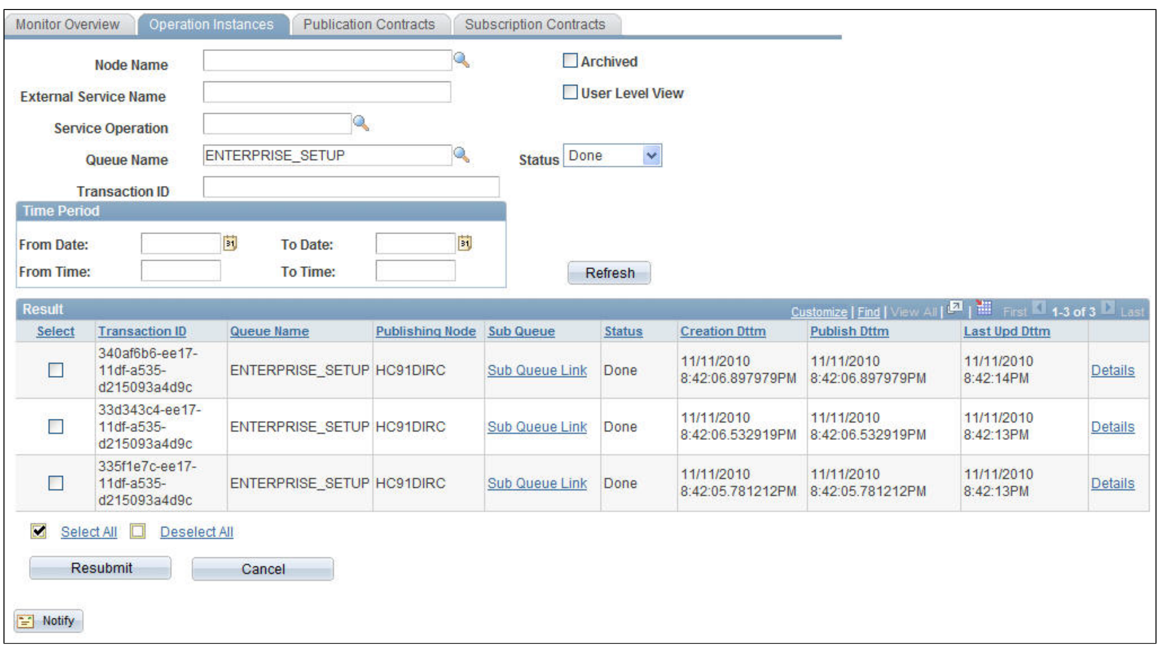
c. Select the Full Table Data Publish process from the Process Scheduler Request page and verify that the process runs successfully.

This example illustrates the fields and controls on the Process Scheduler Request page where the Full Table Data Publish process is selected.



3. Navigate to **PeopleTools** > **Integration Broker** > **Service Operations Monitor** > **Monitoring** > **Asynchronous Services** to review the status of the Full Sync messages created by the Full Data Publish process.

   This example illustrates the fields and controls on the Operation Instances page to monitor asynchronous service operations.



Understanding the Setup Data Loading Sequence

Minimum setup information must be available and loaded from your HCM system to your CS system for implementation. This should be completed before performing any transactional data syncs. The values defined in these setup tables are key to person bio-demo data integrity. Oracle recommends that your HCM instance be the system of record for your setup table data.

The table below lists the available service operations and applicable tables. These should load in the order specified.

Integration Description	***Integration Name***	***Table (s)***
Country Codes	COUNTRY_FULLSYNC	COUNTRY_TBL
Currency Codes	CURRENCY_FULLSYNC	CURRENCY_CD_TBL
State/Province Codes	STATE_FULLSYNC	STATE_TBL
SetIDs	SETID_INITIALIZE	SETID_TBL
Tableset Controls	TBLSET_CONTROL_INITIALIZE	SET_CNTRL_TBL SET_CNTRL_GROUP SET_CNTRL_REC
Regulatory Regions	REGULATORY_REGION_FULLSYNC	REG_REGION_TBL HR
Business Units	BUS_UNIT_HR_FULLSYNC	BUS_UNIT_TBL_HR
Company Codes	COMPANY_FULLSYNC	COMPANY_TBL
Location Codes	LOCATION_FULLSYNC	LOCATION_TBL
Department Codes	DEPT_FULLSYNC	DEPT_TBL
Job Codes	JOBCODE_FULLSYNC	JOBCODE_TBL
Holiday Date Schedules	HOLIDAY_DATE_FULLSYNC	HOLIDAY_TBL HOLIDAY_DATE
National ID Types	NID_TYPE_FULLSYNC	NID_TYPE_TBL
Name Types	NAME_TYPE_FULLSYNC	NAME_TYPE_TBL
Name Prefixes	NAME_PREFIX_SUFFIX_ FULLSYNC1	NAME_PREFIX_TBL
Name Suffixes	NAME_PREFIX_SUFFIX_ FULLSYNC2	NAME_SUFFIX_TBL
Name Royal Prefixes	NAME_PREFIX_SUFFIX_ FULLSYNC3	NM_ROYPREF_TBL
Name Royal Suffixes	NAME_PREFIX_SUFFIX_ FULLSYNC4	NM_ROYSUFF_TBL

Integration Description	***Integration Name***	***Table (s)***
Name Titles	TITLE_FULLSYNC	TITLE_TBL
Address Types	ADDRESS_TYPE_FULLSYNC	ADDRESS_TYP_TBL
Person of Interest Types	POI_TYPE_TBL_FULLSYNC	POI_TYPE_TBL
Ethnic Group Codes	ETHNIC_GRP_FULLSYNC	ETHNIC_GROUP_TBL
US Standard Occupational Codes (USA)	US_SOC_FULLSYNC	US_SOC_TBL
Supporting Documents (Visa/Permits)	SUPPORT_DOC_FULLSYNC	SUPPORT_DOC_TBL
Visa Permit Types	VISA_PERMIT_FULLSYNC	VISA_PERMIT_TBL
VISA_PERMIT_SUP	Major Codes COMPETENCY_ FULLSYNC3	MAJOR_TBL

Service Operations and Handlers

The following table identifies the FullSync and Sync Service Operations, and subscription handlers that you should use to configure your CS–HCM setup data integrations. Activate and configure all integrations that you have identified according to your business requirements and implementation plans.

Service Operation	***Description***	***Queue***	***Subscription Handler App Package***
ADDRESS_TYPE_ FULLSYNC	Address Type Table	PERSON_SETUP	AddressTypeFullSync (ADDRESS_TYPE _FULLSYNC/ AddressTypeFullSync/ OnNotify)
ADDRESS_TYPE_SYNC	Address Type Table	PERSON_SETUP	AddressTypeSync (ADDRESS_TYPE_SYNC/ AddressTypeSync/OnNotify)
BUS_UNIT_HR_ FULLSYNC	HR Business Unit Table	HR_SETUP	BusUnitHRFullSync (BUS _UNIT_HR_FULLSYNC/ BusUnitHRFullSync/ OnNotify)

Service Operation	***Description***	***Queue***	***Subscription Handler App Package***
BUS_UNIT_HR_SYNC	Business Unit Table	HR_SETUP	BusUnitHRSync (BUS _UNIT_HR_SYNC/ BusUnitHRSync/OnNotify)
COMPANY_FULLSYNC	Company Codes	PERSON_SETUP	CompanyFullSync (COMPANY_FULLSYNC/ CompanyFullSync/OnNotify)
COMPANY_SYNC	Company Codes	PERSON_SETUP	CompanySync (COMPANY _SYNC/CompanySync/ OnNotify)
COMPETENCY_ FULLSYNC3	College Major Subject Codes	COMPETENCY	CompetencyFullSync3 (COMPETENCY _FULLSYNC3/ CompetencyFullSync3/ OnNotify)
COMPETENCY_SYNC3	College Major Subject Codes	COMPETENCY	CompetencySync3 (COMPETENCY_SYNC3/ CompetencySync3/OnNotify)
COUNTRY_FULLSYNC	Countries	ENTERPRISE_SETUP	GEN_UPG_HANDLER _12332 (COUNTRY _FULLSYNC/ CountryFullSync/OnNotify)
COUNTRY_SYNC	Countries	ENTERPRISE_SETUP	GEN_UPG_HANDLER_ 18170 (COUNTRY_SYNC/ CountrySync/OnNotify)
CURRENCY_FULLSYNC	Currency Codes	ENTERPRISE_SETUP	CurrencyFullSync CURRENCY_FULLSYNC/ CurrencyFullSync/OnNotify
CURRENCY_SYNC	Currency Codes	ENTERPRISE_SETUP	CurrencySync CURRENCY _SYNC/CurrencySync/ OnNotify
DEPT_FULLSYNC	Departments	ENTERPRISE_SETUP	DeptFullSync (DEPT _FULLSYNC/ DeptFullSyncNoCI/OnNotify)

Service Operation	***Description***	***Queue***	***Subscription Handler App Package***
DEPT_SYNC	Departments	ENTERPRISE_SETUP	DeptSync (DEPT_ FULLSYNC/DeptSyncNoCI/ OnNotify)
ETHNIC_GRP_FULLSYNC	Ethnic Group Table	TAM_INTEGRATION	EthnicGrpFullSync ETHNIC _GRP_FULLSYNC/ EthnicGrpFullSync/OnNotify
ETHNIC_GRP_SYNC	Ethnic Group Table	TAM_INTEGRATION	EthnicGrpSync ETHNIC_ GRP_SYNC/EthnicGrpSync/ OnNotify
HOLIDAY_DATE_ FULLSYNC	Holiday Date Schedules	PERSON_SETUP	HolidayDateFullSync HOLIDAY_DATE _FULLSYNC/ HolidayDateFullSync/ OnNotify
HOLIDAY_DATE_SYNC	Holiday Date Schedules	PERSON_SETUP	HolidayDateSync HOLIDAY_DATE_SYNC/ HolidayDateSync/OnNotify
JOBCODE_FULLSYNC	Job Codes	PERSON_SETUP	JobcodeFullSyncJOBCODE _FULLSYNC/ JobcodeFullSyncNoCI/ OnNotify
JOBCODE_SYNC	Job Codes	PERSON_SETUP	JobcodeSync JOBCODE_ SYNC/JobcodeSyncNoCI/ OnNotify
LOCATION_FULLSYNC	Company Site Locations	ENTERPRISE_SETUP	LocationFullSync (LOCATION_FULLSYNC/ LocationFullSyncNoCI/ OnNotify)
LOCATION_SYNC	Company Site Locations	ENTERPRISE_SETUP	LocationSync (LOCATION _SYNC/LocationSyncNoCI/ OnNotify)

Service Operation	***Description***	***Queue***	***Subscription Handler App Package***
NAME_PREFIX_SUFFIX_FULLSYNC1	Name	Prefixes	NAME_PREFIX_SUFFIX_TABLES NamePrefixSuffixFullSync1 NAME_PREFIX_SUFFIX_FULLSYNC1/NamePrefixSuffixFullSync1/OnNotify
NAME_PREFIX_SUFFIX_FULLSYNC2	Name	SuffixTable	NAME_PREFIX_SUFFIX_TABLES NamePrefixSuffixFullSync2 NAME_PREFIX_SUFFIX_FULLSYNC2/NamePrefixSuffixFullSync2/OnNotify
NAME_PREFIX_SUFFIX_FULLSYNC3	Name Royal Pref Table	NAME_PREFIX_SUFFIX_TABLES	NamePrefixSuffixFullSync3 NAME_PREFIX_SUFFIX_FULLSYNC3/NamePrefixSuffixFullSync3/OnNotify
NAME_PREFIX_SUFFIX_FULLSYNC4	Name Royal Suff Table	NAME_PREFIX_SUFFIX_TABLES	NamePrefixSuffixFullSync4 NAME_PREFIX_SUFFIX_FULLSYNC4/NamePrefixSuffixFullSync4/OnNotify
NAME_PREFIX_SUFFIX_SYNC1	Name Prefixes	NAME_PREFIX_SUFFIX_TABLES	NamePrefixSuffixSync1 NAME_PREFIX_SUFFIX_SYNC1/NamePrefixSuffixSync1/OnNotify
NAME_PREFIX_SUFFIX_SYNC2	Name SuffixTable	NAME_PREFIX_SUFFIX_TABLES	NamePrefixSuffixSync2 NAME_PREFIX_SUFFIX_SYNC2/NamePrefixSuffixSync2/OnNotify

Service Operation	***Description***	***Queue***	***Subscription Handler App Package***
NAME_PREFIX_SUFFIX_ SYNC3	Name Royal Pref Table	NAME_PREFIX_SUFFIX_ TABLES	NamePrefixSuffixSync3 NAME_PREFIX_ SUFFIX_SYNC3/ NamePrefixSuffixSync3/ OnNotify
NAME_PREFIX_SUFFIX_ SYNC4	Name Royal Suff Table	NAME_PREFIX_SUFFIX_ TABLES	NamePrefixSuffixSync4 NAME_PREFIX_ SUFFIX_SYNC4/ NamePrefixSuffixSync4/ OnNotify
NAME_TYPE_FULLSYNC	Name Type Table	PERSON_SETUP	NameTypeFullSync NAME _TYPE_FULLSYNC/ NameTypeFullSync/OnNotify
NAME_TYPE_SYNC	Name Type Table	PERSON_SETUP	NameTypeSync NAME _TYPE_SYNC/ NameTypeSync/OnNotify
NID_TYPE_FULLSYNC	National ID Type table	PERSON_SETUP	NidTypeFullSync NID _TYPE_FULLSYNC/ NidTypeFullSync/OnNotify
NID_TYPE_SYNC	National ID Type table	PERSON_SETUP	NidTypeSync NID_TYPE _SYNC/NidTypeSync/ OnNotify
OPR_DEF_FULLSYNC	Operator Defaults Table - HR	TAM_INTEGRATION	OprDefFullSync OPR _DEF_FULLSYNC/ OprDefFullSync/OnNotify
OPR_DEF_SYNC	Operator Defaults Table - HR	TAM_INTEGRATION	OprDefSync OPR_DEF_ SYNC/OprDefSync/OnNotify
POI_TYPE_TBL_ FULLSYNC POI	Type Table	PERSON_SETUP	POITypeTBLFullSync POI _TYPE_TBL_FULLSYNC/ POITypeTblFullSync/ OnNotify

Service Operation	***Description***	***Queue***	***Subscription Handler App Package***
POI_TYPE_TBL_SYNC POI	Type Table	PERSON_SETUP	POITypeTBLSync POI _TYPE_TBL_SYNC/ POITypeTblSync/OnNotify
REGULATORY_REGION_ FULLSYNC	Regulatory Region	PERSON_SETUP	RegRegionFullSync REG _REGION_FULLSYNC/ RegRegionFullSync/OnNotify
REGULATORY_REGION_ SYNC	Regulatory Region	PERSON_SETUP	RegRegionSync REG _REGION_SYNC/ RegRegionSync/OnNotify
SETID_INITIALIZE	SetIDs	TBLSET_CONTROL	SetidInitialize (SETID_ INITIALIZE/SetidInitialize/ OnNotify)
STATE_FULLSYNC	State Codes	ENTERPRISE_SETUP	StateFullSync STATE_ FULLSYNC/StateFullSync/ OnNotify
STATE_SYNC	State Codes	ENTERPRISE_SETUP	StateSync STATE_SYNC/ StateSync/OnNotify
SUPPORT_DOC_ FULLSYNC	Visa Supporting Documents	TAM_INTEGRATION	SupportDocFullSync SUPPORT_DOC _FULLSYNC/ SupportDocFullSync/ OnNotify
SUPPORT_DOC_SYNC	Visa Supporting Documents	TAM_INTEGRATION	SupportDocSync SUPPORT_DOC_SYNC/ SupportDocSync/OnNotify
TBLSET_CONTROL_ INITIALIZE	TableSet Control Records	TBLSET_CONTROL	TblsetControlInitialize TBLSET_CONTROL _INITIALIZE/ TblsetControlInitiatlize/ OnNotify
TITLE_FULLSYNC	Title Table	PERSON_SETUP	TitleFullSync TITLE_ FULLSYNC/TitleFullSync/ OnNotify

Service Operation	***Description***	***Queue***	***Subscription Handler App Package***
TITLE_SYNC	Title Table	PERSON_SETUP	TitleSync TITLE_SYNC/ TitleSync/OnNotify
US_SOC_FULLSYNC	US Standard Occupational Codes	PERSON_SETUP	USSocFullSync US_SOC_ FULLSYNC/USSocFullSync/ OnNotify
US_SOC_SYNC US	Standard Occupational Codes	PERSON_SETUP	USSocSync US_SOC_SYNC/ USSocSync/OnNotify
VISA_PERMIT_FULLSYNC	Visa Permit Types	VISA_PERMIT	VisaPermitFullSync VISA _PERMIT_FULLSYNC/ VisaPermitFullSync/OnNotify
VISA_PERMIT_SYNC	Visa Permit Types	VISA_PERMIT	VisaPermitSync VISA _PERMIT_SYNC/ VisaPermitSync/OnNotify

See also:

PeopleTools: Integration Broker Testing Utilities and Tools

Using Delivered EIPs

The following table lists delivered EIPs that support CS-to-HCM integration.

EIP Name	***Description***
ADDRESS_TYPE_FULLSYNC	Address Type Table
ADDRESS_TYPE_SYNC	Address Type Table
BUS_UNIT_HR_FULLSYNC	HR Business Unit Table
BUS_UNIT_HR_SYNC	HR Business Unit Table
COMPANY_FULLSYNC	Company Codes
COMPANY_SYNC	Company Codes
COMPETENCY_FULLSYNC3	College Major Subject Codes

EIP Name	***Description***
COMPETENCY_SYNC3	College Major Subject Codes
COUNTRY_FULLSYNC	Countries
COUNTRY_SYNC	Countries
CURRENCY_FULLSYNC	Currency Codes
CURRENCY_SYNC	Currency Codes
DEPT_FULLSYNC	Departments
DEPT_SYNC	Departments
ETHNIC_GRP_FULLSYNC	Ethnic Group Table
ETHNIC_GRP_SYNC	Ethnic Group Table
HOLIDAY_DATE_FULLSYNC	Holiday Date Schedules
HOLIDAY_DATE_SYNC	Holiday Date Schedules
JOBCODE_FULLSYNC	Job Codes
JOBCODE_SYNC	Job Codes
LOCATION_FULLSYNC	Company Site Locations
LOCATION_SYNC	Company Site Locations
NAME_PREFIX_SUFFIX_FULLSYNC1	Name Prefixes
NAME_PREFIX_SUFFIX_FULLSYNC2	Name Suffix Table
NAME_PREFIX_SUFFIX_FULLSYNC3	Name Royal Pref Table
NAME_PREFIX_SUFFIX_FULLSYNC4	Name Royal Suff Table
NAME_PREFIX_SUFFIX_SYNC1	Name Prefixes

EIP Name	***Description***
NAME_PREFIX_SUFFIX_SYNC2	Name Suffix Table
NAME_PREFIX_SUFFIX_SYNC3	Name Royal Pref Table
NAME_PREFIX_SUFFIX_SYNC4	Name Royal Suff Table
NAME_TYPE_FULLSYNC	Name Type Table
NAME_TYPE_SYNC	Name Type Table
NID_TYPE_FULLSYNC	National ID Type Table
NID_TYPE_SYNC	National ID Type Table
OPR_DEF_FULLSYNC	Operator Defaults Table - HR
OPR_DEF_SYNC	Operator Defaults Table - HR
PERS_POI_FULLSYNC	Dflt Transaction Tbl for POIs
PERS_POI_SYNC	Dflt Transaction Tbl for POIs
PERSON_BASIC_FULLSYNC	Person
PERSON_BASIC_SYNC	Person
PERSON_DISABILITY_FULLSYNC	Disability
PERSON_DISABILITY_SYNC	Disability
PERSON_DIVERSITY_FULLSYNC	Diversity Data
PERSON_DIVERSITY_SYNC	Diversity Data
PERS_EMERGNCY_CONTACT_SYNC	Emergency Contacts
PERS_EMERGNCY_CONTACT_FULLSYNC	Emergency Contacts
PERSON_VISA_CITIZEN_FULLSYNC1	EE/Dependent Citizenship

EIP Name	***Description***
PERSON_VISA_CITIZEN_FULLSYNC2	EE/Depndnt Visa Support Docs
PERSON_VISA_CITIZEN_SYNC	EE/Dependent Citizenship
POI_TYPE_TBL_FULLSYNC	POI Type Table
POI_TYPE_TBL_SYNC	POI Type Table
REGULATORY_REGION_FULLSYNC	Regulatory Region
REGULATORY_REGION_SYNC	Regulatory Region
SETID_INITIALIZE	SetIDs
STATE_FULLSYNC	State Codes/Names w/in Country
STATE_SYNC	State Codes/Names w/in Country
SUPPORT_DOC_FULLSYNC	Visa Supporting Documents
SUPPORT_DOC_SYNC	Visa Supporting Documents
TBLSET_CONTROL_INITIALIZE	TableSet Control Records
TITLE_FULLSYNC	Title Table
TITLE_SYNC	Title Table
US_SOC_FULLSYNC	U.S. Standard Occupational Codes
US_SOC_SYNC	U.S. Standard Occupational Codes
USER_PROFILE	User Profiles
VISA_PERMIT_FULLSYNC	Visa Supporting Docs Needed
VISA_PERMIT_SYNC	Visa Supporting Docs Needed
WORKFORCE_FULLSYNC	Job and Person Org Assignments

EIP Name	Description
WORKFORCE_SYNC	Job and Person Org Assignments

Monitoring Integrations Using the Integrity Utility

This section provides an overview of the Integration Integrity Utility and discusses how to:

- Get started with the Utility.
- Configure the Utility.

Note: Documentation relevant to Campus Solutions and Human Capital Management integration is available on My Oracle Support (ID 2091799.2).

Understanding the Integration Integrity Utility

The Integration Integrity Utility (the Utility) provides configurable end-user tools to help monitor and maintain high-quality data in separate PeopleSoft CS and PeopleSoft HCM databases. As with most integration, unplanned scenarios can sometimes leave data out-of-sync. The Utility provides methods to detect, report, and resynchronize data where necessary.

Data Integration Assumptions and Practices

Using the Integration Integrity Utility to regularly monitor data provides assurance that your data is being synchronized properly between separate PeopleSoft CS and PeopleSoft HCM databases.

A valuable feature of the Utility is the ability to resync data if discrepancies are found; however, it is important to remember some general assumptions and guidelines when using this Utility:

- Oracle integration design models for separate CS and HCM databases (Owner/Subscriber, Subscriber Only) assume that shared data is replicated exactly between both databases.
- The Utility is not designed to replace standard Application Messaging. Errors that may occur in Integration Broker Queue processing should be properly investigated and the message transaction resubmitted for proper handling.
- If data discrepancies appear regularly on comparison reports, there may be a systemic problem that should be investigated, and corrected.
- Data discrepancies may be the result of a variety of root causes. Investigation into the issue is critical.
- Data comparisons should be run during periods of low activity, and when transaction changes are not expected to occur frequently.

Pages Used With the Utility

Page Name	***Definition Name***	***Navigation***	***Usage***
Comparison Methods	SCC_DISCREP_METHOD	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Comparison Methods**	Maintain the list of available methods for comparing table data between two different databases.
Resolution Methods	SCC_DISCREP_APPMTH	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Resolution Methods**	Maintain the list of methods used to apply winners to resolve data discrepancies.
Data Sources	SCC_DISCREPDSRC	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Data Sources**	Provide connection information for an external data source.
Database Link Maps	SCC_DISCREP_LNK	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Database Link Maps**	Define mappings from a record name to a database link record name.
Record Maps	SCC_DISCREP_MAP	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Record Maps**	Define a view used to compare data for the same table on two different databases. Views may be used instead of the base table when only certain columns or rows are desired for comparison.
Winner Rules	SCC_DISCREP_RULE	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Winner Rules**	Maintain rule definitions for determining how to resolve data discrepancies between the same table on two different databases.
CS Permission Maps	SCC_PERMISN_MAP	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **CS Permission Maps**	Set comparison and discrepancy resolution security by mapping record names to permission lists in CS.
HCM Permission Maps	HCI_PERMISN_MAP	**Set Up Common Objects** > **Common Definitions** > **CS Integration** > **HCM Permission Maps**	Set comparison and discrepancy resolution security by mapping record names to permission lists in HCM.

Page Name	***Definition Name***	***Navigation***	***Usage***
Run Discrepancy Comparison	SCC_DISCREPRCTL	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Run Discrepancy Comparison**	Run the comparison process to determine data discrepancies in the specified tables between two databases.
Integration Discrepancies	SCC_INTGR_DSCRPNCY	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Integration Discrepancies**	Display data discrepancies found between the same table on two different databases and specify the winner for resolution.
Discrepancy Details	SCC_INTGR_DSCRFLDS	Click the **Show Fields** link for any row on the Integration Discrepancies page.	Show data discrepancy details for a selected row.
Resolve Discrepancies	SCC_DISCREP_RUNRUL	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Resolve Discrepancies**	Run the process to apply the winner rule to all discrepancy rows in the specified table or resolve discrepancies.
Resolution Log	SCC_RESOLVE_LOG	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Resolution Log**	View a log of transactions that have resolved data discrepancies.
Purge Resolution Log	SCC_RSLVLOGPRUNCTL	**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Purge Resolution Log**	Run the process to delete data discrepancy resolved transaction logs.

Getting Started With the Utility

Before setting up and running the Utility, you can analyze the data that is kept in sync between your PeopleSoft CS and PeopleSoft HCM databases. This information is needed for configuring the Utility.

Here are some points to consider regarding this analysis:

- Oracle integration design models (Owner/Subscriber, Subscriber Only) assume that shared data is replicated exactly between both databases.

  Note: Some data fields, such as audit date/time fields, may have slightly different values in each database due to the nature of Application Messaging.

- Is there any custom data filtering as part of your integration design? For tables where the data is not fully synchronized, a view is needed to achieve accurate comparison results. A view allows the Utility to compare a subset of fields between the databases, or supports the use of custom logic defined in the view SQL.

- The list of tables that are synchronized differ at every institution, and may include customizations. Your resulting list becomes the scope of tables to be compared between the databases.
- There are several delivered methods for performing data comparison and resolution. You can choose a method depending on your data and database environments. You may also develop and add other comparison or resolution methods.
- Related Language tables must be separately compared and resolved.
- Audit tables and fields should not be compared.
- The compare process reports data discrepancies by table, and it does not enforce the parent/child relationship. Please note the following guidance when using the Resolution process to resync data:
  - Add missing parent record rows before adding any children data rows.
  - Delete child data rows before deleting a parent data row.

Identify Synchronized Tables

Identify the list of tables where data is synchronized between your PeopleSoft CS and PeopleSoft HCM databases; be sure to include setup tables and all tables where manual data entry occurs in both databases.

The following list of synchronized tables is supported by delivered integrations. Not all tables may be populated in your CS database, or have data that your institution keeps in sync. These tables form part of the message structure definition and therefore are included in this list.

Delivered Base Tables

This list is also populated as setup data on the CS Permission Maps page.

Name	***Description***
ACCOM_DIAGNOSIS	EE Accommodation Diagnosis
ACCOM_JOB_TASK	EE Accommodation Job Tasks
ACCOM_OPTION	EE Accommodation Options
ACCOM_OP_LNG	EE Accommodation Options
ACCOM_REQUEST	EE Accommodation Requests
ADDRESSES	Address Type

Name	*Description*
ADDRESS_TYP_LNG	Address Type Table (rel. lang)
ADDRESS_TYP_TBL	Address Type Table
BEN_PROG_PARTIC	EE Benefit Programs
BUS_UNIT_HR_LNG	Rellang HR Business Unit
BUS_UNIT_TBL_HR	HR Business Unit Table
CAN_JOBCODE_CU	Canadian WCB Jobcode to CU
CITIZENSHIP	EE/Dependent Citizenship
CITIZEN_PSSPRT	EE/Dependent Passport Data
CITIZEN_STS_LNG	Citizen Status Language Table
CITIZEN_STS_TBL	Citizen Status Table
CIT_PSSPRT_LANG	EE/Dependent Passport Data
COMPANY_TBL	Company Codes
COMPANY_TBL_ITA	Company Table - ITA
COMPENSATION	EE Compensation Data
COMPNY_TBL_LANG	Related Lang-Company Tbl
COMP_PHONE_TBL	Company Phone Table
COUNTRYTBL_LANG	Country Related Language
COUNTRY_TBL	Countries
CURRCD_TBL_LANG	Currency Related Language

Name	***Description***
CURRENCY_CD_TBL	Currency Codes
DEPT_TBL	Departments
DEPT_TBL_LANG	Related Lang-Department Tbl
DISABILITY	Disability
DISABILITY_BRA	Disability Brazil
DISABILITY_CHE	Disability Table - CHE
DISABILITY_ESP	Disability Table - ESP
DISABILITY_FRA	Disability
DISABILITY_GER	GER Disabled EE info
DISABILITY_NLD	Disability Netherlands
DISABILITY_NZL	NZL Employee Disability Data
DIVERSITY	Diversity Data
DIVERS_ETHNIC	Ethnic Diversity
DIVERS_RELIGION	Religion Diversity - Asia Pac
EMAIL_ADDRESSES	Email Addresses
EMERGENCY_CNTCT	EE Emergency Contacts
EMERGENCY_PHONE	EE Emergency Cntct-Phone Nbr
EO_ADDRFMT_LANG	Address fields
EO_ADDR_FMT_TBL	Address fields

Name	***Description***
ETHNIC_GRP_LANG	Ethnic Group -Lang
ETHNIC_GRP_TBL	Ethnic Group Table
HOLIDAY_DATE	Holiday Dates
HOLIDAY_DTE_LNG	Holiday Dates RelLang
HOLIDAY_LANG	Holiday Table ID RelLang
HOLIDAY_TBL	Holiday Table ID
HP_EMPLT_TEACH	
HR_EE_SNR_DATES	Job Labor Seniority Dates
JOB	EE Job History
JOBCD_COMP_RATE	Job Code Comp Rate Table
JOBCD_TRN_PROG	Job Codes
JOBCODE_LANG	Related Lang-Job Code Tbl
JOBCODE_TBL	Job Codes
JOB_AUS	Job Extension for AU
JOB_EARNS_DIST	EE Job Earnings Distribution
JOB_IND	Job table for India
JOB_JR	Job Junior
JOB_MIL	Military Related Job Fields
JOB_USF	Job Extension for USF

Name	***Description***
LOCATION_LANG	Related Lang-Location Tbl
LOCATION_TBL	Company Site Locations
MAJOR_TBL	College Major Subject Codes
MAJOR_TBL_LANG	Related Lang-Major Tbl
NAMES	Person Names
NAME_PREFIX_LNG	Related Lang - Name Prefix Tbl
NAME_PREFIX_TBL	Name Prefixes
NAME_SUFFIX_LNG	Related Lang - Name Suffix Tbl
NAME_SUFFIX_TBL	Name Suffix Table
NAME_TYPE_VW	Employee Name Types
NATIONALITY_GER	GER - Nationality record
NID_TYPE_LANG	Related Lng Tbl - NID_TYPE_TBL
NID_TYPE_TBL	National ID Type table
NM_ROYPREF_LNG	Related Lang for Roy Pref
NM_ROYPREF_TBL	Name Royal Pref Table
NM_ROYSUFF_LNG	Related Lang for Royal Suff
NM_ROYSUFF_TBL	Name Royal Suff Table
OPR_DEF_TBL_HR	Operator Defaults Table - HR
PERSON	PERSON record

Name	*Description*
PERSONAL_PHONE	Personal Data - Phone Numbers
PERSON_BRA	PERSON BRAZIL
PERSON_FRA	Person Subrecord - FRA
PERSON_SA	Higher Education Person Extension Record
PERS_DATA_BRA	Personal Data Effdt
PERS_DATA_CAN	Extension of PERSON for CAN
PERS_DATA_CHE	Extension of PERSON for CHE
PERS_DATA_DEU	Effdt Ext of PERSON for DEU
PERS_DATA_EFFDT	Effective Dated Personal Data
PERS_DATA_ESP	Extension of PERSON for ESP
PERS_DATA_FPS	Extension of PERSON for FPS
PERS_DATA_FRA	Extension of PERSON for FRA
PERS_DATA_IND	Personal Data - India
PERS_DATA_ITA	Extension of PERSON for ITA
PERS_DATA_JPN	Extension of PERSON for JPN
PERS_DATA_MEX	Personal Data Effdt Mexico
PERS_DATA_USA	Extension of PERSON for USA
PERS_DATA_USF	Ext of PERS_DATA_EFFDT for USF
PERS_HUKOU_CHN	PERSON CHINA

Name	***Description***
PERS_NID	PERS_NID Record
PERS_REGIST_BEL	Empl Registration Number - BEL
PERS_SMOKER	PERSON Smoker History
PERS_WRKLIF_CHN	PERSON WORK LIFE INFO CHINA
PERS_WRKLV_CHN	Working & Living Permit
PER_ORG_ASGN	Person Org Assignments
PER_ORG_ASG_BEL	PER_ORG_ASG - Exts for Belgium
PER_ORG_ASG_BRA	PER_ORG_ASG Ext for Brazil
PER_ORG_ASG_FA	PER_ORG_ASG_FA
PER_ORG_ASG_HP	Per Org Asgn for E&G
PER_ORG_ASG_JPN	PER_ORG_ASGN Ext for JPN
PER_ORG_ASG_LNG	Rel Lng for PER_ORG_ASGN
PER_ORG_ASG_MIL	Person Assignment - Military
PER_ORG_ASG_NLD	PER_ORG- Exts for Netherlands
PER_ORG_INST	Person Org Instance
PER_POI_SCRTY	Per Poi Security
PER_POI_SCR_DT	Per Poi Security
PER_POI_TRANS	Dflt Transaction Tbl for POIs
PER_POI_TRN_LNG	Lng Tbl for PER_POI_TRANS

Name	***Description***
PER_POI_TYPE	Person POI Types
PLACE_ORIG_CHE	Employee Place of Origin
POI_TYPE_LNG	POI Type Language
POI_TYPE_TBL	POI Type Table
REG_REGION_LANG	Regulatory Region
REG_REGION_TBL	Regulatory Region
SETID_LANG	TableSet IDs
SETID_TBL	TableSet IDs
SET_CNTRL_GROUP	TableSet Record Groups
SET_CNTRL_REC	TableSet Record Detail
SET_CNTRL_TBL	TableSet Controls
STATE_TBL	State Codes/Names w/in Country
STATE_TBL_LANG	State Names Related Language
SUPPORT_DOC_TBL	Visa Supporting Documents
SUPPRT_DOC_LANG	Related Lang-Visa Support Docs
TITLE_TBL	Title Table
TITLE_TBL_LNG	Rellang Title Table
US_SOC_TBL	US Standard Occupational Codes
US_SOC_TBL_LNG	US Standard Occupational Codes

Name	***Description***
VISA_PERMIT_SUP	Visa Supporting Docs Needed
VISA_PERMIT_TBL	Visa Requirements by Country
VISA_PERMT_LANG	Related Lang-Visa Requirements
VISA_PMT_DATA	EE/Dependent Visa Data
VISA_PMT_DA_LNG	EE/Dependent Visa Data
VISA_PMT_SUPPRT	EE/Depndnt Visa Support Docs

Determine Views Needed for Record Maps

The Utility generally performs data comparison using base tables. In some cases, using views instead of base tables, provides the ability to filter the data compared between the two databases. This is useful in cases where:

- The Last Updated Date/Time field values may differ and should be excluded from the compare;
- Record definitions are different between the databases;
- Record definitions include long varchar or image fields (as these are not supported by all comparison methods);
- Data rows may not be identical – by design – between the databases, such as for filtered populations.

The following views are delivered and can be used for setting Record Maps. These views have certain fields excluded to increase accurate data comparison – such as drop out hits on LASTUPDDTTM values.

- Some of these views are existing HCR interface views, and are used elsewhere in Campus Solutions.
- New views created for this purpose are named HCI_%.

The following list of base tables and views are referenced in delivered message definitions used with CS-to-HCM integrations.

Base Table Name	***View Name***
ACCOM_OPTION	HCI_ACCOMOPT_VW
ACCOM_OP_LNG	HCI_ACCOMOPL_VW
ACCOM_REQUEST	HCI_ACCOMREQ_VW

Base Table Name	***View Name***
ADDRESSES	HCR_PER_ADDR_I
CITIZEN_PSSPRT	HCI_CIT_PASS_VW
CIT_PSSPRT_LANG	HCI_CITPSPTL_VW
CURRENCY_CD_TBL	HCI_CRNCY_CD_VW
CURRCD_TBL_LANG	HCI_CRNCY_CD_VL
DEPT_TBL	HCI_DEPT_VW
DEPT_TBL_LANG	HCI_DEPT_VWLANG
DISABILITY	HCI_DISABIL_VW
DISABILITY_FRA	HCI_DISAB_FR_VW
DISABILITY_NZL	HCI_DISAB_NZ_VW
JOB	HCI_JOB_VW HCI_JOB_V2
JOB_IND	HCI_JOB_IND_VW
JOBCODE_TBL	HCI_JOBCODE_VW HCI_JOBCODE_V2
JOBCODE_LANG	HCI_JOBCODE_VWL HCI_JOBCODE_VL2
JOB_JR	HCI_JOB_JR_VW
JOB_MIL	HCI_JOB_MIL_VW
LOCATION_TBL	HCI_LOCATION_VW

Base Table Name	***View Name***
NAMES	HCR_PER_NAME_I
PERSON	HCR_PERSON_I
PERS_DATA_BRA	HCI_PDATA_BRAVW
PERS_DATA_EFFDT	HCR_PER_PDE_I
PERS_NID	HCR_PER_NID_I
PER_ORG_ASGN	HCI_PERORGASGNV
PER_ORG_ASG_LNG	HCI_PERORGASGNL
PER_ORG_INST	HCI_PERORGINSVW
PER_POI_SCRTY	HCI_PERPOISECVW
PER_POI_TYPE	HCI_PERPOITYPVW
POI_TYPE_LNG	HCI_POITYPLN_VW
POI_TYPE_TBL	HCI_POI_TYP_VW
SETID_LANG	HCI_SETID_LN_VW
SETID_TBL	HCI_SETID_VW
US_SOC_TBL	HCI_US_SOC_VW
US_SOC_TBL_LNG	HCI_US_SOCLN_VW
VISA_PERMIT_TBL	HCI_VISAPRMT_VW
VISA_PERMT_LANG	HCI_VISAPRMTLVW

Note: The HCI_JOBCODE_VW and HCI_JOBCODE_VWL views pick up the currently effective row while the HCI_JOB_V2, HCI_JOBCODE_V2, and HCI_JOBCODE_VL2 views pick up all rows.

Configuring the Utility

To configure the Utility for data comparison and resolution:

1. Configure the system.
    - Set the *Add to CLASSPATH* Variable (optional, only if using Java JDBC methods).
    - Create a Database Link on the database server (optional, only if using Database Link method).
2. Determine Comparison methods (required).
3. Determine Resolution methods (required).
4. Define Data Source (optional, only if using Java JDBC methods).
5. Define Database Link Map (optional, only if using Database Link methods).
6. Set Record Maps (optional, depends on tables).
7. Define Winner Rules (optional).
8. Determine Permission Maps (required).
9. Configure the HCI_RECORD service operations (optional, only if using Synchronous Message resolution method).

System Configuration: Set the Add to CLASSPATH Variable

This procedure is required only if using Java JDBC methods.

This procedure is performed only on the CS environment; it does not need to be performed on the HCM environment.

This procedure should be done on both the Application Server and Process Server domains.

The Add to CLASSPATH environment variable parameter enables the Java Virtual Machine (JVM) and other Java applications to find the Java class libraries, including any user-defined class libraries. Because PeopleTools automatically generates CLASSPATH entries for core, delivered class libraries, setting this variable specifies additional class libraries that the PeopleSoft software needs to access.

To use this parameter, you need to uncomment it in the configuration files for Application Server and Process Server.

1. Use PSADMIN to access the configuration file in the Application Server and Process Server.
2. Uncomment the *Add to CLASSPATH* variable.
3. Add the appropriate database platform JAR files to the *Add to CLASSPATH* variable as follows

Database Platform	***JAR Files***
DB2	db2jcc_license_cisuz.jar db2jcc4.jar sqlj4.zip
Microsoft SQL Server	sqljdbc4.jar
Oracle	ojdbc6.jar or latest version

Note: For DB2 platforms it is also necessary to modify the *Add to PATH* variable and append <db2sqllib>\bin;<db2sqllib>\function. Consult your database platform documentation for further details.

System Configuration: Create Database Link

This procedure is required only if using the Database Link comparison method.

Create the database link on the CS instance database server. It does not need to be created on the HCM instance.

Database links are platform-dependent and must be created on the database server. Consult your specific database platform documentation and database administrator for more information and the proper syntax for creating database links on your environments.

Oracle

The following is a sample command for creating a database link on the Oracle database:

```
CREATE DATABASE LINK HRDBLINK CONNECT TO <sqluid> IDENTIFIED
BY <sqlpass> USING '<dbname>';
```

Microsoft SQL Server

The following is a set of sample commands for creating a SYNONYM on the SQL Server database. Run the following commands first; substituting your specific values for those in the example:

Example:

```
sp_addlinkedserver myhost;
```

Example:

```
sp_addlinkedsrvlogin myhost, false, 'localaccessid', ‘remoteaccessid’, ‘remoteacces⇒

spw’;
```

The syntax is:

```
sp_addlinkedserver [ @server= ] ‘server’ [ , [ @srvproduct= ] ‘product_name’ ]
[ , [ @provider= ] ‘provider_name’ ]
```



```
[ , [ @datasrc= ] 'data_source' ]
[ , [ @location= ] 'location' ]
[ , [ @provstr= ] 'provider_string' ]
[ , [ @catalog= ] 'catalog' ]

sp_addlinkedsrvlogin [ @rmtsrvname = ] 'rmtsrvname'
[ , [ @useself = ] 'TRUE' | 'FALSE' | NULL ]
[ , [ @locallogin = ] 'locallogin' ]
[ , [ @rmtuser = ] 'rmtuser' ]
[ , [ @rmtpassword = ] 'rmtpassword' ]
```

Then run the following command; substituting your specific values for those in the example:

Example:

```
CREATE SYNONYM HR_PS_VISA_PMT_DATA FOR myhost.mydb.dbo.PS_VISA_PMT_DATA;
```

The syntax is:

```
CREATE SYNONYM [ schema_name_1. ] synonym_name FOR <object><object> :: ={ [ server_⇒

name.[ database_name ] . [ schema_name_2 ].| database_name . [ schema_name_2 ].| sc⇒

hema_name_2. ] object_name}
```

Test by running the following command:

Example:

```
SELECT COUNT(*) FROM HR_PS_VISA_PMT_DATA;
```

See *PeopleTools: System and Server Administration*, “Setting Application Server Domain Parameters”

Configuring Comparison Methods

There are three delivered methods for performing data comparison:

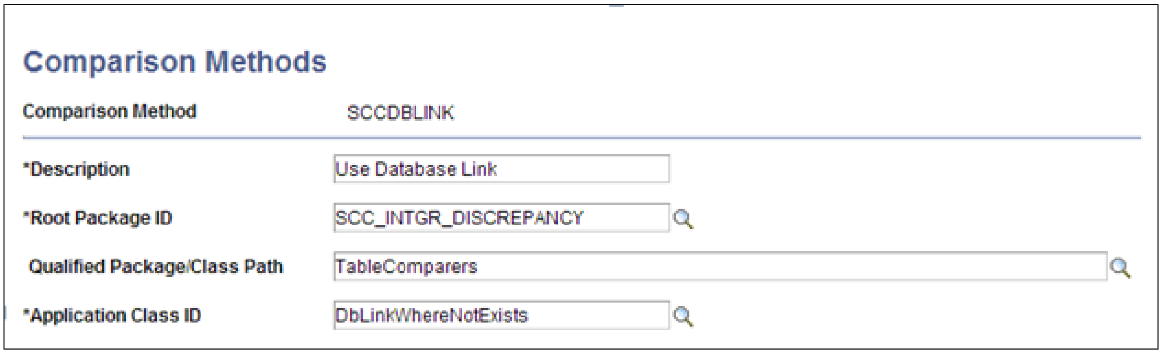
- SCCDBLINK—Use Database Link.
- SCCJDBC—Use Java JDBC.
- Full Sync Method—Full Data Publish asynchronous message process

---

Note: There is no Comparison Methods setup data for the Full Sync method as it leverages the Full Data Publish message subscription process.

Access the Comparison Methods page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Comparison Methods**).

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



Field or Control	***Description***
Description	The description for the comparison method.
Root Package ID	The application package used for the comparison method.
Qualified Package\Class Path	The class path being used.
Application Class ID	The application class ID being used.

The following table details the required configuration components for each comparison method.

Comparison Method	***Data Source***	***Database Link on Server***	***Database Link Map***	***Record Maps***	***Permission Maps***	***Service Operation***
SCCDBLINK - Database Link		X	X	X	X	
SCCJDBC - Java JDBC	X			X	X	
Full Sync				X	X	X

Java JDBC

The Java JDBC method uses a Java class to read from the HCM database, and the data is then compared inside the SCC_DISCREP2 batch process with data discrepancies logged to the Integration Discrepancies table. The Java objects required for using this method are delivered with Campus Solutions

This method generally performs slower than the database link method, but does not require the kind of maintenance as for a database link. Consider using this method if a database link is not suitable for your environment.

To use the delivered Java JDBC method:

1. Complete the *Add to CLASSPATH* system configuration detailed in the preceding step.
2. Define a Data Source definition for the foreign HCM database.
3. Define appropriate Record Maps and Permission Maps for the tables to be compared.

Database Link

The Database Link method uses a database link to link the HCM table to its sibling CS table, with the data comparison done on the database server. Results are returned to the SCC_DISCREP2 batch process with data discrepancies logged to the Integration Discrepancies table.

This method generally performs the fastest, but does not run on all platforms.

To use the delivered Database Link method:

1. Create a database link to the HCM database on the database server for the CS instance.
2. Define a Database Link Map for every table to be compared.
3. Define appropriate Record Maps and Permission Maps for the tables to be compared.

Full Sync

The Full Sync method leverages the delivered Full Data Publish messages which are published from the HCM instance and a special subscription handler in the CS instance is used to read and perform the data compare.

The Full Sync method is better suited for smaller volume tables as it generally runs slower than the other methods, but it runs on any platform. Use this method if you cannot use the others.

Important! Do NOT activate the standard Full Sync subscription handlers when using this method, as this can impact data in the production tables. The SCC_INTGR_DISCREPENCY handler code delivered for performing this comparison does not update data in the base tables.

Configuring and Running the FULLSYNC Compare Method

This section discusses how to:

- Configure FULLSYNC service operations.
- Define the Full Data Publish Rule.
- Run the Full Data Publish process.
- Review integration discrepancy results.

Configuring the FULLSYNC Service Operations

To set up service operations on the HCM instance:

1. Access **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**.
2. Activate the selected FULLSYNC service operation on the tables to be compared.

3. Grant appropriate service operation security. No Handlers are required.

4. Configure the routing to the Campus Solutions database, using proper transformations if required for the message being used.

To set up service operations on the CS instance:

1. Access **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**.

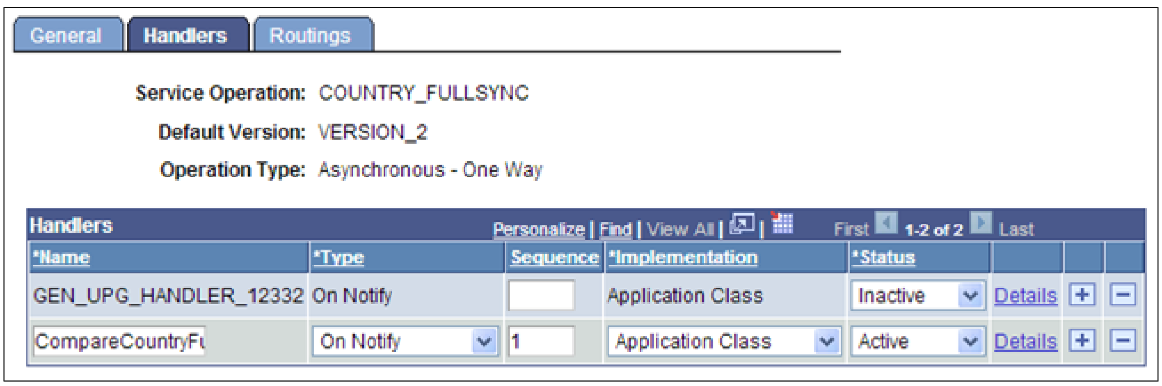
2. Activate the selected FULLSYNC service operation on the tables to be compared.

3. Grant appropriate service operation security.

4. On the Handlers tab, configure the Full Sync Compare subscription handler.

Important! Inactivate the FULLSYNC data handler for this procedure as this can impact production data. After the Full Sync data compare is completed, reset your handler settings as needed.

This example illustrates potential Handlers page field values.

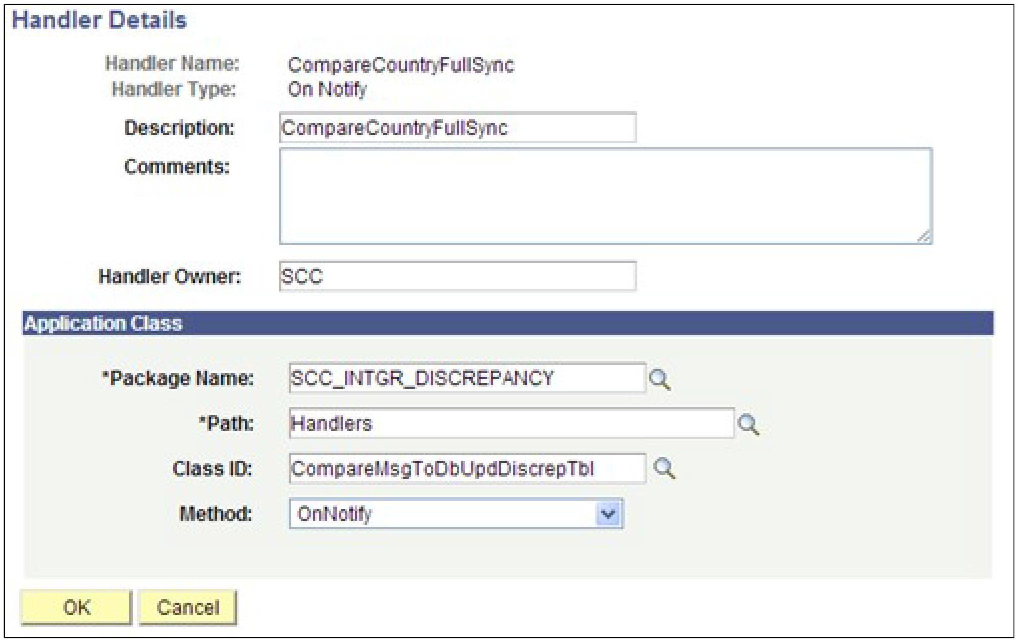


a. Under the Service Operation Handler tab, insert a row in the Handlers grid.

Field or Control	***Description***
Name	Define a Name for the handler.
Type	OnNotify
Implementation	Application Class
Status	Set to Active.

b. Click the Details link and set up the following:

This example illustrates potential Handler Details page field values.



Field or Control	*Description*
Description, Comments	Optional fields
Handler Owner	Define a Handler Owner.
Application Class- Package Name, Path, Class, Method	In the Application Class section, select the Package, Path, Class and the Method to be invoked

5. Configure the inbound routing in the CS database, using transformations if required for the selected FULLSYNC service operation.

6. Save the Service Operation changes.

Defining the Full Data Publish Rule

To define the full data publish rule:

1. Access **Enterprise Components** > **Integration Definitions** > **Full Data Publish Rule**.

2. Configure the Full Data Publish Rule for the selected FULLSYNC service operation.

Running the Full Data Publish Process

To run on the HCM instance:

1. Access **Enterprise Components** > **Integration Definitions** > **Initiate Processes** > **Full Data Publish**.

2. On the run control, set the process request parameters and select the desired Service Operation.

3. Run the process.

Reviewing Integration Discrepancy Results

To run on the CS instance:

1. Confirm successful FULLSYNC message transaction subscription in the Integration Broker Monitor.

2. Review the results on the Integration Discrepancies pages.

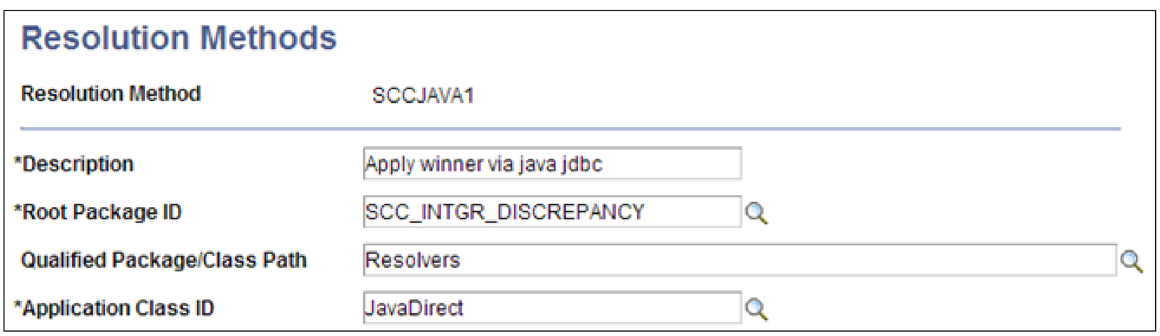
Configuring Resolution Methods

The Utility resolves data discrepancies between databases using either of two delivered resolution methods. Both methods are invoked by the Resolve Discrepancies process (Application Engine SCC_DISCREP3). Either resolution method may be used independent of the method used for data compare.

Method	***Description***
SCCJAVA1	Apply winner via Java jdbc.
SCCSYNCMSG1	Apply winner via Synchronous Message.

Access the Resolution Methods page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Resolution Methods**).

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



Field or Control	***Description***
Description	The description for the resolution method.
Root Package ID	The application package used for the resolution method.
Qualified Package\Class Path	The class path being used.

Field or Control	***Description***
Application Class ID	The application class ID being used.

The following table details the required configurations for each delivered resolution method. The procedures for each are detailed subsequently.

Resolution Method	***Data Source***	***Record Maps***	***Permission Maps***	***Winner Rules***	***Service Operation***
SCCJAVA1 Java JDBC	X	X	X	X	
SCCSYNCMSG1 Synchronous Message		X	X	X	X

Defining Data Sources

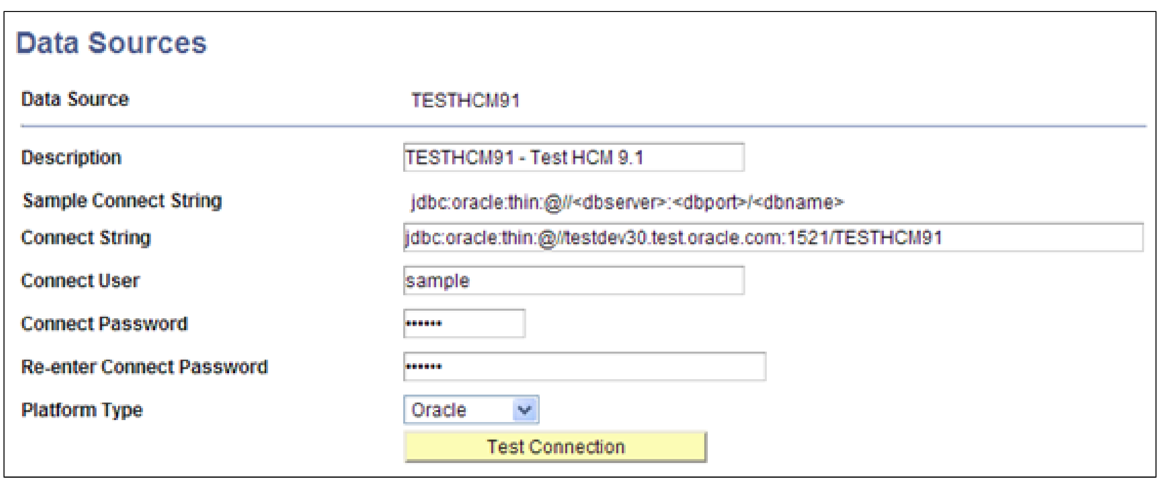
In order to use the Java JDBC method, you must define a data source for the HCM database. You need not define a data source for the CS database instance.

Important! Define the data source name to match the Node name of the HCM database.

The sample connect string is platform-specific. Select the appropriate Platform Type from the drop-down list to see examples of the connect string relevant to the database platform.

Access the Data Sources page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Data Sources**)).

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



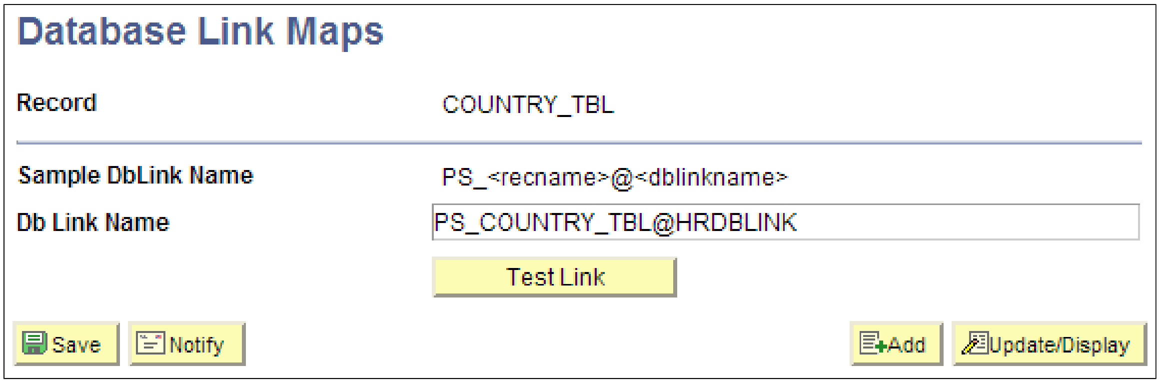
Field or Control	***Description***
Description	Enter the description for the data source.
Sample Connect String	The displayed text changes based on the selected Platform Type.
Connect String	Enter the connect string, following the correct platform parameters. The syntax for the connect string uses the thin-style service name.
Connect User	Enter the connect user ID.
Connect Password	Enter the password for the connect user ID.
Re-enter Connect Password	Re-enter the password for the connect user ID.
Platform Type	Supported platform types.
Test Connection	Click this button to test the connection. A successful connection triggers a “success” message; an unsuccessful connection throws up a Java error message.

Defining Database Link Maps

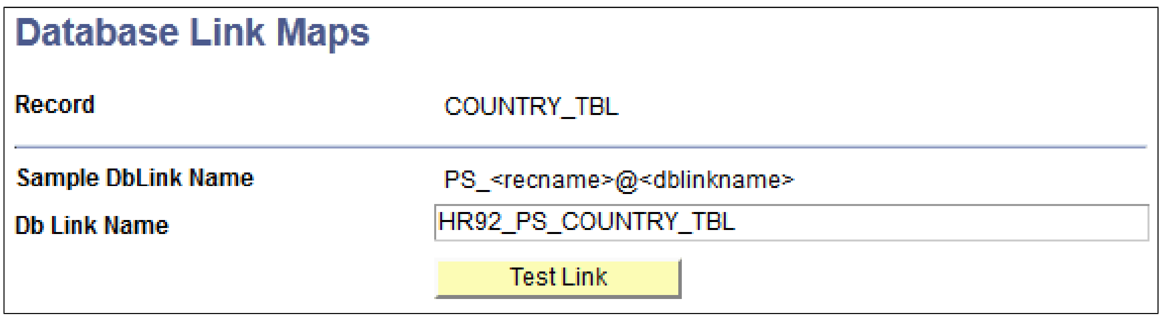
To use the Database Link comparison method (SCCDBLINK), a database link for the HCM database must exist on the CS database server, and a database link map must be defined for every table that is being compared. For SQL Server database link maps, use the synonym name instead of the table name.

Access the Database Link Maps page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Database Link Maps**).

This example illustrates the fields and controls on the Database Link Maps page for an Oracle database. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Database Link Maps page for SQL Server. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Record	The table name that is being defined.
Sample Db Link Name	All database link maps should follow this example.
Db Link Name	Enter the Db Link using the proper syntax.

Defining Record Maps

When the Comparison process runs, the program evaluates the Record Maps definitions and selects data using any defined Mapping View Name instead of selecting the columns from the base table definition.

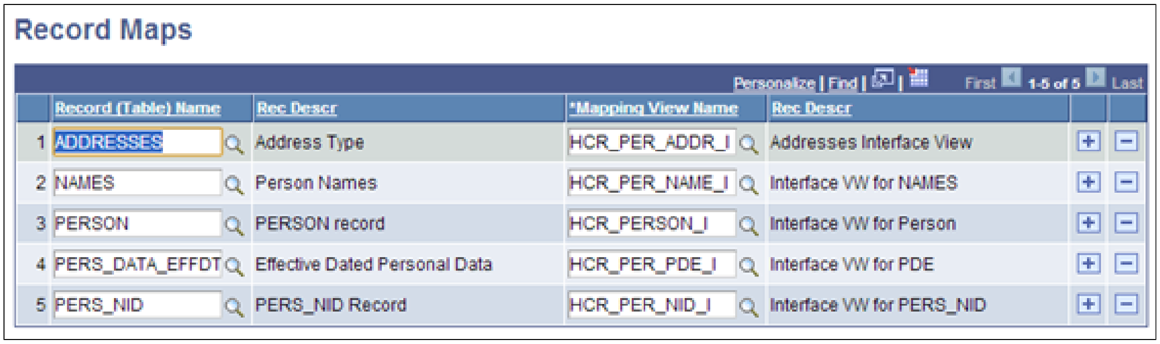
Record Maps are not required. Data comparisons can be done directly between the tables; however Record Maps are necessary when you want to omit columns or rows, or reformat columns for comparison. This allows for configuration and extensibility in several ways:

- Exclude audit fields such as LASTUPDDTTM.
- Exclude other data fields.
- Compare records between databases where record definitions are different.

- Include custom logic, such as custom selection criteria in SQL View text.

Access the Record Maps page (**(Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Record Maps**).

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



Field or Control	***Description***
Record (Table) Name	Enter the base SQL Table name.
Rec Descr	The Record Definition description for the base SQL Table.
Mapping View Name	Enter the SQL View name to be used. This must be a valid SQL View in Application Designer.
Rec Descr	The Record Definition description for the SQL View.

Defining Winner Rules

Usually most data discrepancies are due to specific reasons and should be investigated and resolved individually. For example, a broken integration transaction might be suspended in the Queue. To resolve this, the transaction should be fixed and resubmitted through the Queue.

There may be circumstances when data discrepancies can be resolved in the same way. Using a winner rule can simplify the task of setting the winners on the Integration Discrepancies page. For example, you may set some data discrepancy winners manually, but then use a winner rule to update the rest.

For the delivered winner rules, only those rows on the Integration Discrepancies page that are marked Undecided are updated according to the selected rule.

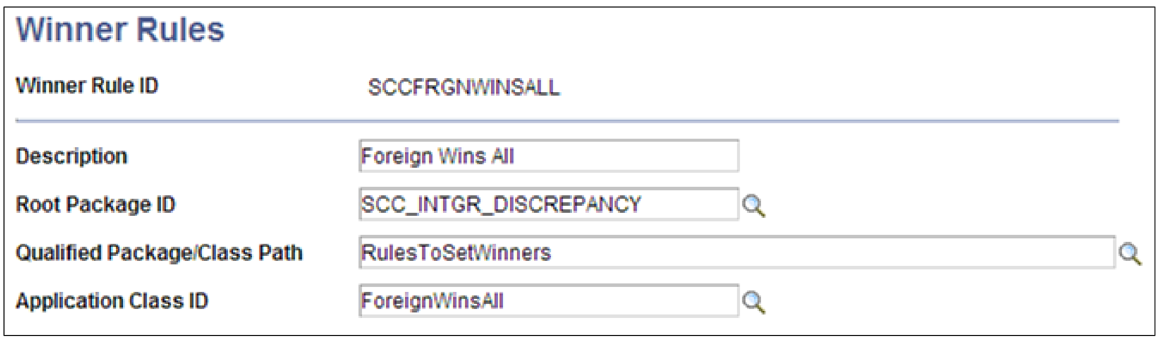
Winner Rules are used on the Resolve Discrepancies process run control page.

There are two delivered Winner Rule ID definitions:

Method	*Description*
SCCFRGNWINSALL	Foreign Wins All (the designated foreign "target" database values are used to update the local database).
SCCLOCALWINSALL	Local Wins All (the designated local "source" database values are used to update the foreign database).

Access the Winner Rules page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Winner Rules**).

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



Field or Control	*Description*
Description	The description for the winner rule.
Root Package ID	The application package used for the winner rule.
Qualified Package\Class Path	The class path being used.
Application Class ID	The application class ID being used.

Defining Permission Maps

Permission Maps define security settings for read/write access to tables used by the Comparison and Resolution processes. Both CS and HCM environments must be configured with appropriate Permission Maps settings. Read/Write security authorization is assigned by Record name associated with a Permission List.

The SCC_DISCREP2 compare process uses the mapped view for comparison. The SCC_DISCREP3 resolution process uses the base table.

In the CS instance, access the CS Permission Maps page **(Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **CS Permission Maps)**.

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


CS Permission Maps

Permission Maps — Personalize | Find | First 1-288 of 288 Last

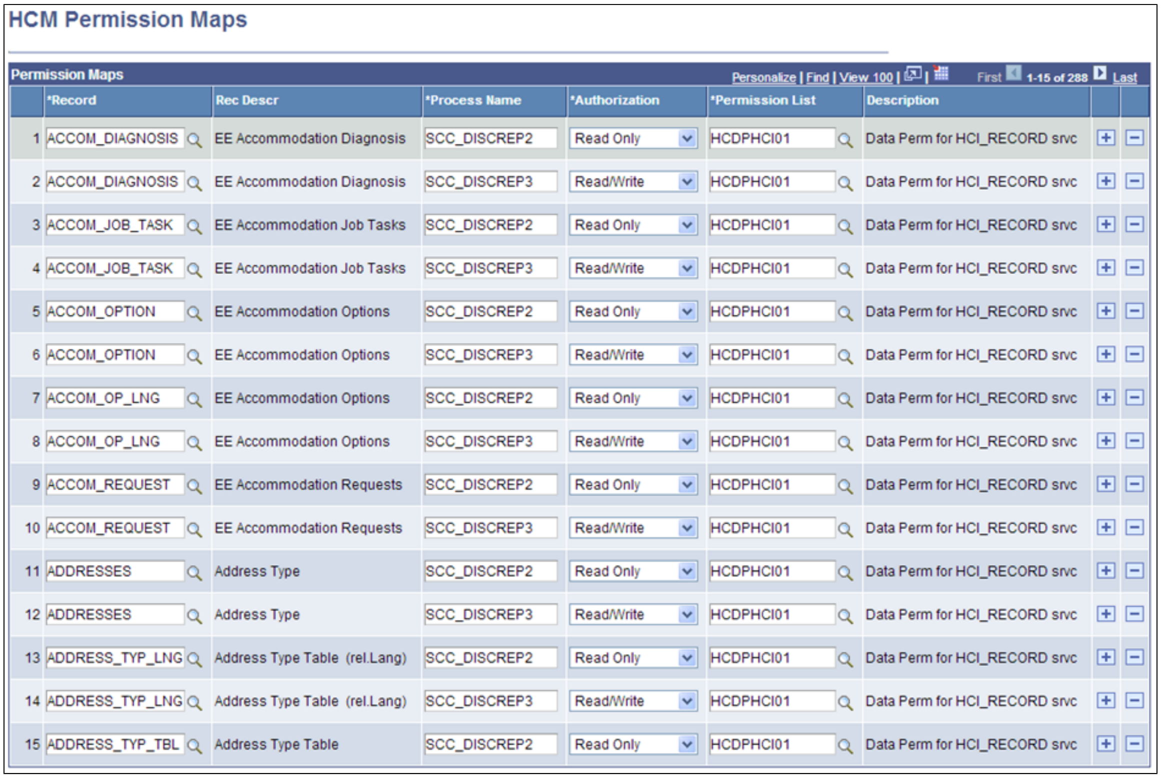
	*Record	Rec Descr	*Process Name	Description	*Authorization	*Permission List	Description
1	ACCOM_DIAGNOSIS	EE Accommodation Diagnosis	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
2	ACCOM_DIAGNOSIS	EE Accommodation Diagnosis	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU
3	ACCOM_JOB_TASK	EE Accommodation Job Tasks	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
4	ACCOM_JOB_TASK	EE Accommodation Job Tasks	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU
5	ACCOM_OPTION	EE Accommodation Options	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
6	ACCOM_OPTION	EE Accommodation Options	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU
7	ACCOM_OP_LNG	EE Accommodation Options	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
8	ACCOM_OP_LNG	EE Accommodation Options	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU
9	ACCOM_REQUEST	EE Accommodation Requests	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
10	ACCOM_REQUEST	EE Accommodation Requests	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU
11	ADDRESSES	Address Type	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
12	ADDRESSES	Address Type	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU
13	ADDRESS_TYP_LN(	Address Type Table (rel.Lang)	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
14	ADDRESS_TYP_LN(	Address Type Table (rel.Lang)	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU
15	ADDRESS_TYP_TBL	Address Type Table	SCC_DISCREP2	Run discrepancy comparison	Read	HCDPCSSA0001	Data Permissions for IIU
16	ADDRESS_TYP_TBL	Address Type Table	SCC_DISCREP3	Set winners, apply resolutions	Write	HCDPCSSA0001	Data Permissions for IIU

Field or Control	***Description***
Record	Enter the base table name.
Rec Descr	The Record Definition description of the base table.
Process Name and **Description**	The delivered SCC_DISCREP2 or SCC_DISCREP3 App Engine processes.
Authorization	Read or Write access to the specified record.
Permission List	Data Permission List that must be attached to Role to the User.
Description	The permission list description.

Note: The Process Name provides an additional security attribute for the Synchronous Message method HCI_RECORD service operations to ensure the service request is made from an authorized program or component.

In the HCM instance, access the HCM Permission Maps page **(Set Up Common Objects > Common Definitions > CS Integration > HCM Permission Maps)**.

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


HCM Permission Maps

Permission Maps — Personalize | Find | View 100 | First 1-15 of 288 Last

	*Record	Rec Descr	*Process Name	*Authorization	*Permission List	Description
1	ACCOM_DIAGNOSIS	EE Accommodation Diagnosis	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc
2	ACCOM_DIAGNOSIS	EE Accommodation Diagnosis	SCC_DISCREP3	Read/Write	HCDPHCI01	Data Perm for HCI_RECORD srvc
3	ACCOM_JOB_TASK	EE Accommodation Job Tasks	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc
4	ACCOM_JOB_TASK	EE Accommodation Job Tasks	SCC_DISCREP3	Read/Write	HCDPHCI01	Data Perm for HCI_RECORD srvc
5	ACCOM_OPTION	EE Accommodation Options	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc
6	ACCOM_OPTION	EE Accommodation Options	SCC_DISCREP3	Read/Write	HCDPHCI01	Data Perm for HCI_RECORD srvc
7	ACCOM_OP_LNG	EE Accommodation Options	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc
8	ACCOM_OP_LNG	EE Accommodation Options	SCC_DISCREP3	Read/Write	HCDPHCI01	Data Perm for HCI_RECORD srvc
9	ACCOM_REQUEST	EE Accommodation Requests	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc
10	ACCOM_REQUEST	EE Accommodation Requests	SCC_DISCREP3	Read/Write	HCDPHCI01	Data Perm for HCI_RECORD srvc
11	ADDRESSES	Address Type	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc
12	ADDRESSES	Address Type	SCC_DISCREP3	Read/Write	HCDPHCI01	Data Perm for HCI_RECORD srvc
13	ADDRESS_TYP_LNG	Address Type Table (rel.Lang)	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc
14	ADDRESS_TYP_LNG	Address Type Table (rel.Lang)	SCC_DISCREP3	Read/Write	HCDPHCI01	Data Perm for HCI_RECORD srvc
15	ADDRESS_TYP_TBL	Address Type Table	SCC_DISCREP2	Read Only	HCDPHCI01	Data Perm for HCI_RECORD srvc

Field or Control	***Description***
Record	Enter the base table name.
Rec Descr	The Record Definition description of the base table.
Process Name	The delivered SCC_DISCREP2 or SCC_DISCREP3 App Engine processes.
Authorization	Read or Write access to the specified record.
Permission List	Data Permission List that must be attached to Role to the User.
Description	The permission list description.

Configuring the HCI_RECORD Service Operations

The HCI_RECORD service is a synchronous request/response message which is invoked by the Synchronous Message resolution process to perform Add, Update, and Delete actions on data.

There are three service operations used by the Synchronous Message (SCCMSGSYNC1) resolution method:

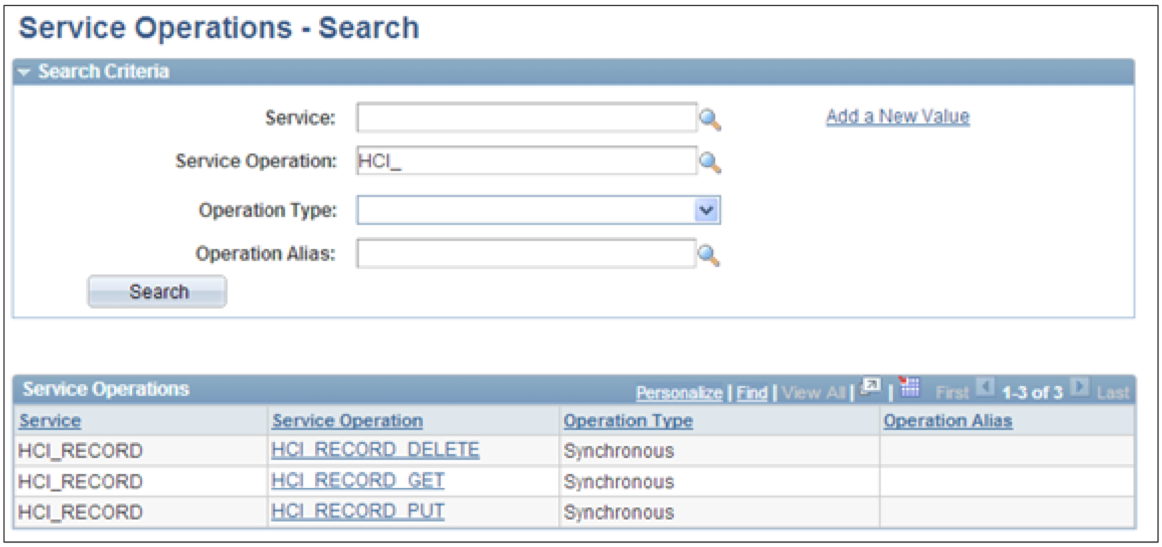
- HCI_RECORD_DELETE
- HCI_RECORD_GET
- HCI_RECORD_PUT

The HCI_RECORD service operations are used with the Synchronous Message resolution method. The following steps describe the HCI_RECORD service operations configuration.

Note: These instructions are common to all HCM releases.

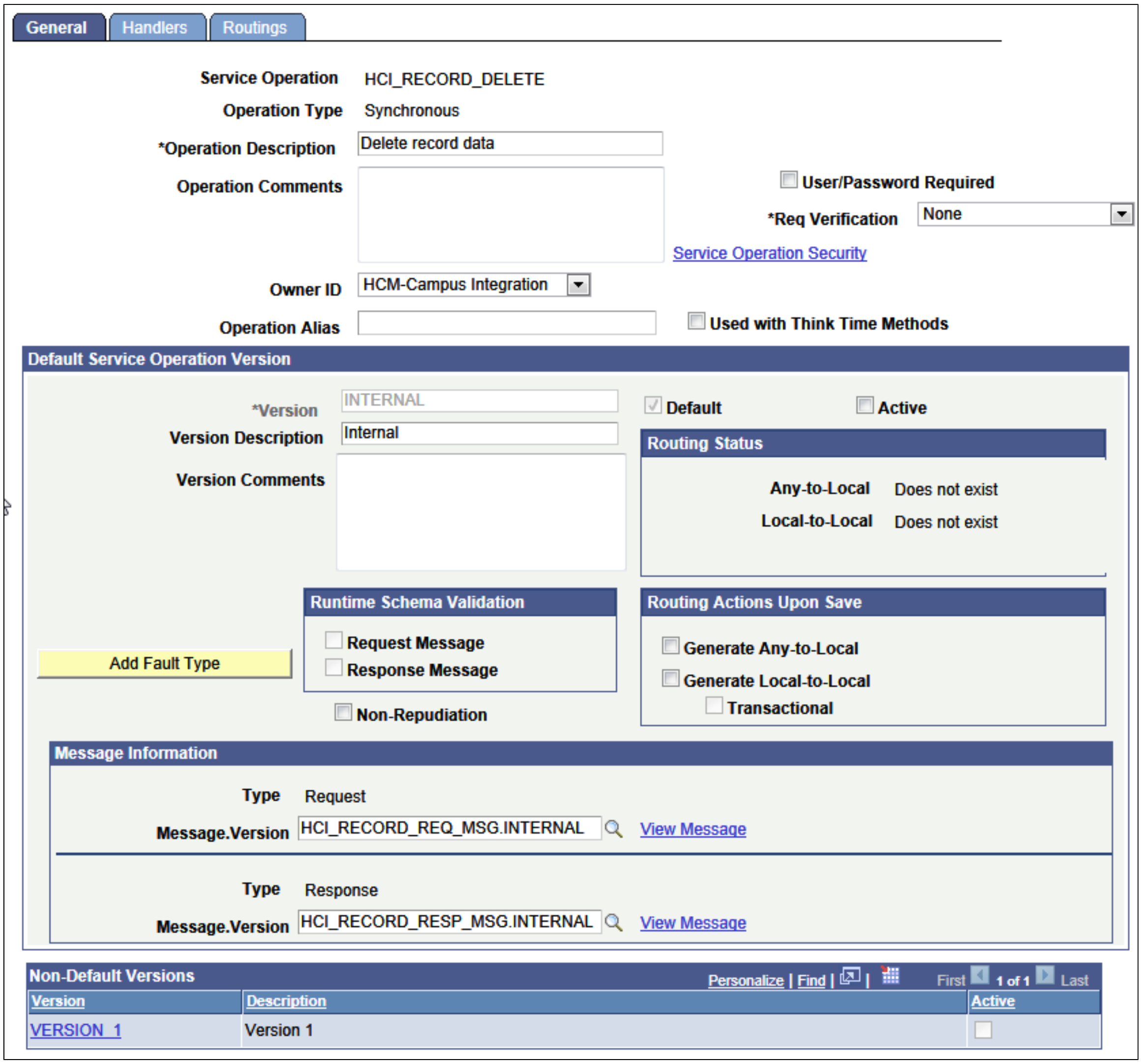
Configure HCI_RECORD Service Operations in HCM

This example illustrates the fields and controls on an example of the Service Operations search page (HCM).



1. Open **Service Operation** *HCI_RECORD_DELETE.*

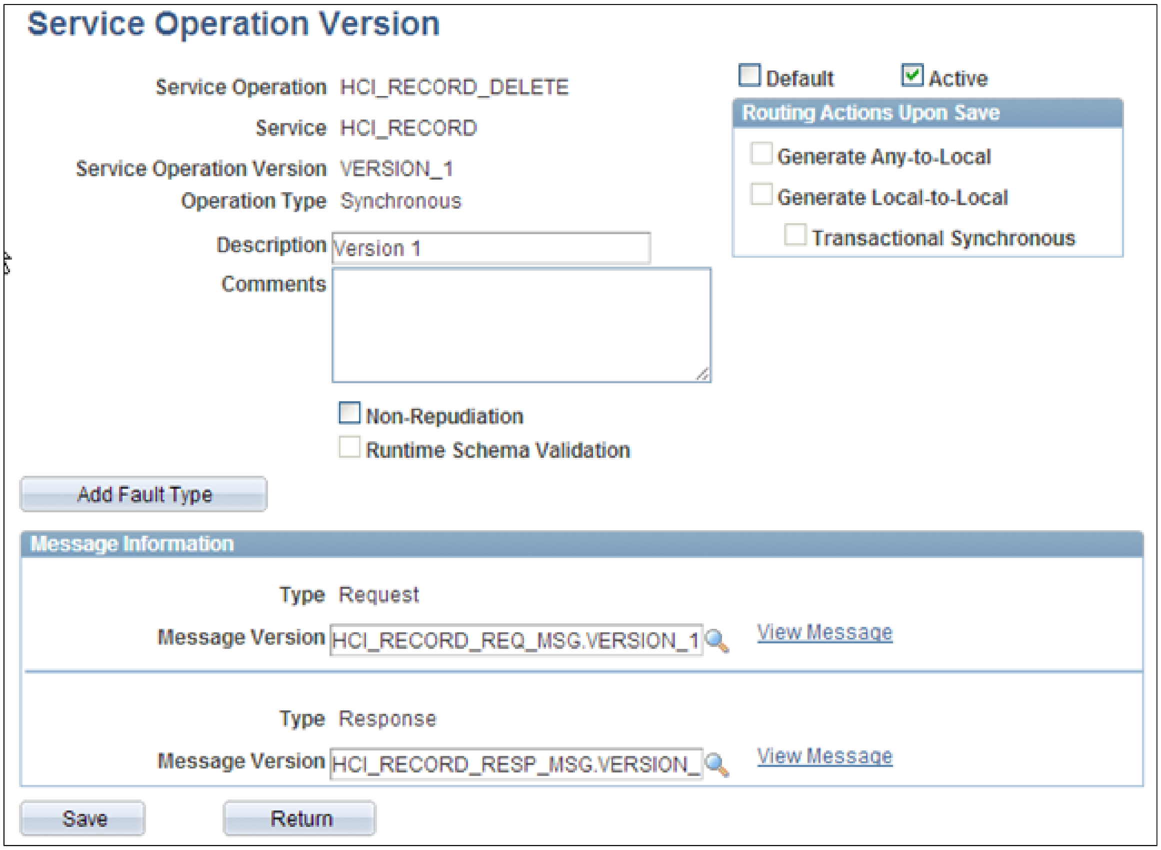
This example illustrates the fields and controls on an example of the Service Operations – General page (HCM).



2. In the Default Service Operation Version group box, select the **Active** check box and click **Save**.

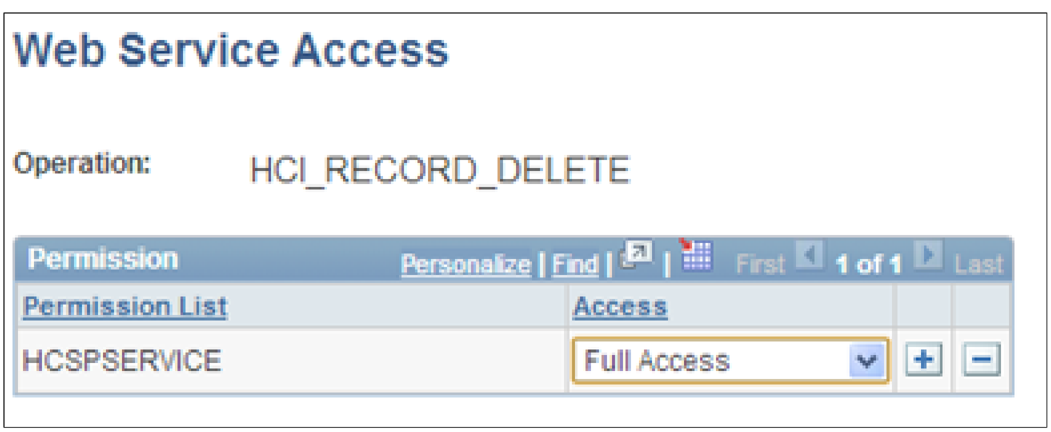
3. In the Non-Default Versions group box, click the *VERSION_1* link.

This example illustrates the fields and controls on the Example of Service Operation Version page (HCM).



4. Select the **Active** check box and click **Save**.
5. Click **Return**.
6. On the General page, click the **Service Operation Security** link and enter the appropriate permission list.

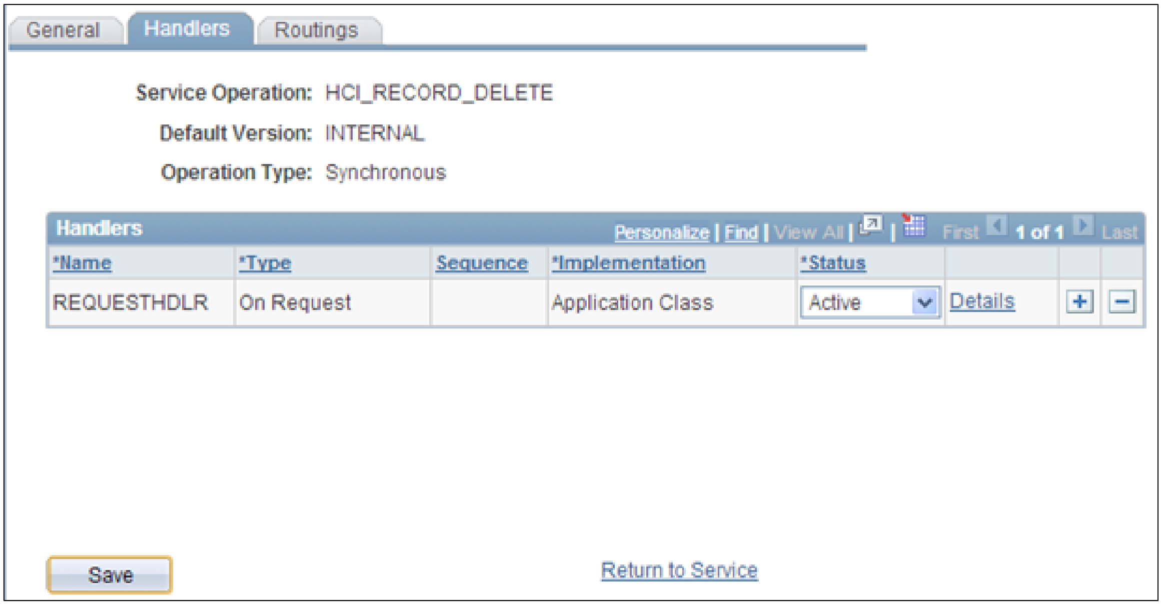
   This example illustrates the fields and controls on an example of the Web Service Access page (HCM).



7. Click **Save**, then close the window.

8. Select the Handlers tab to activate the On-Request Handler, as shown below.

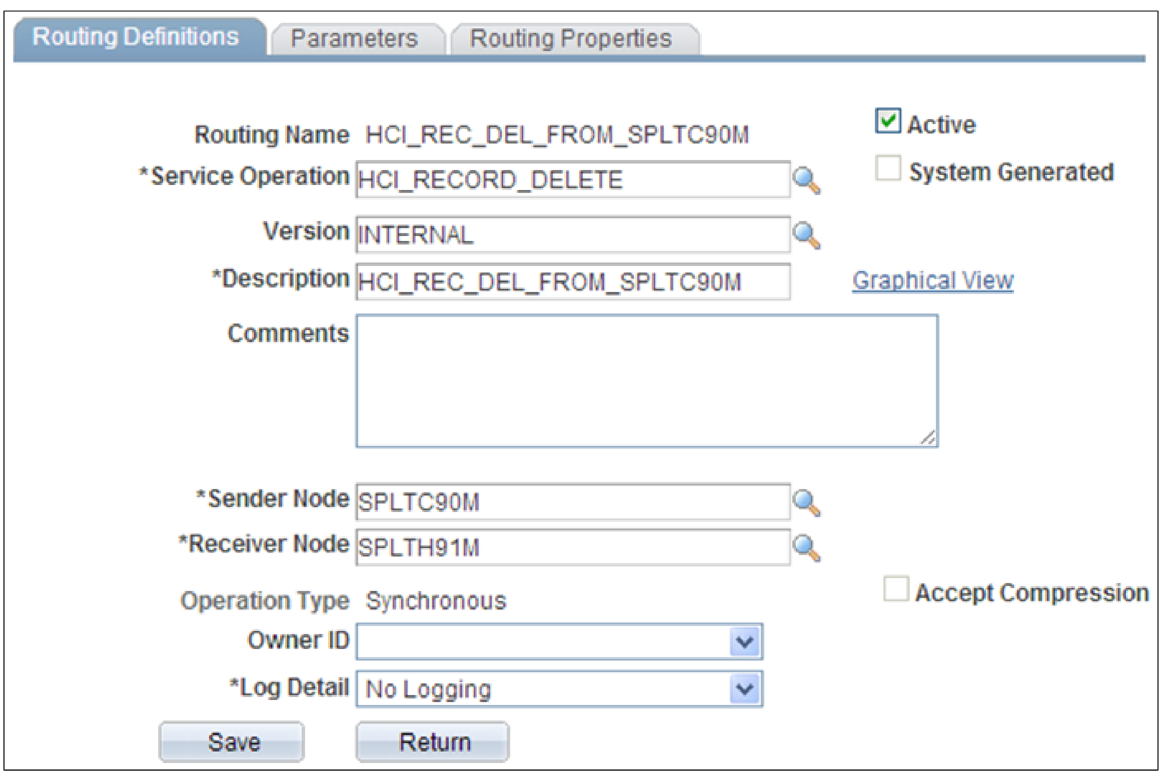
   This example illustrates the fields and controls on an example of the Service Operations – Handlers page (HCM).



9. Select the Routings tab to add a routing to the sender database.

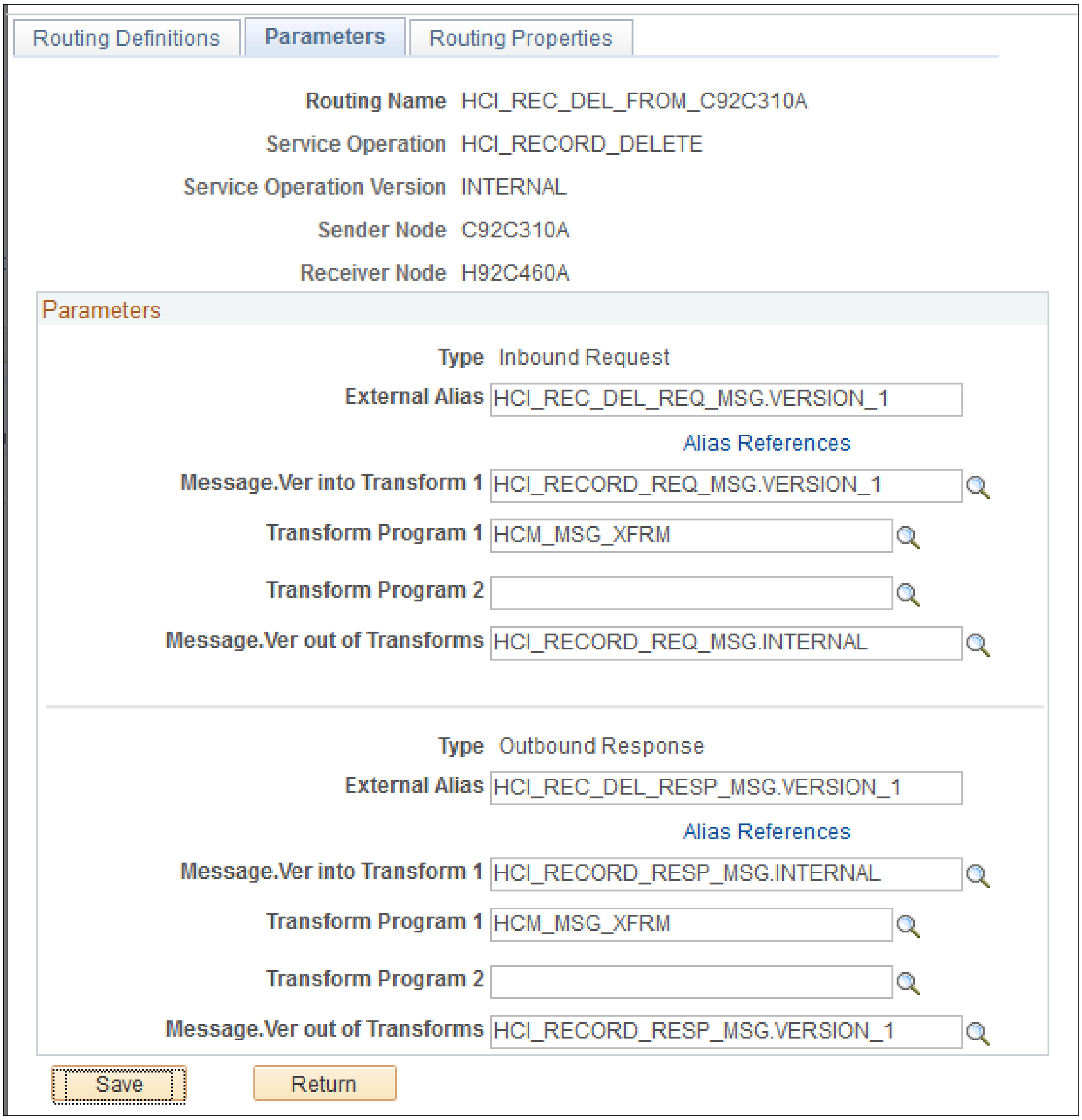
   (In this example, the SPLTC90M database is the sender, so the routing is named *HCI_REC_DEL_FROM_SPLTC90M*.)

   This example illustrates the fields and controls on an example of the Routing Definitions page (HCM).



10. Enter a **Description, Sender Node,** and **Receiver Node.**
11. On the Parameters tab, enter the required information for the Inbound and Outbound requests.

    This example illustrates the fields and controls on an example of the Parameters page (HCM).



- The Inbound Request transformation program is *HCM_MSG_XFRM*.
- The Outbound Response transformation program is *HCM_MSG_XFRM*.
- The External Alias is changed to *VERSION_1* in both cases.

Note: On PeopleTools (PT) versions 8.55 and later, all synchronous transformation programs are replaced with HCM_MSG_XFRM. For earlier PT versions, the transformation program for requests is now HCM_MSG_XREQ; and HCM_MSG_XRSP for responses.

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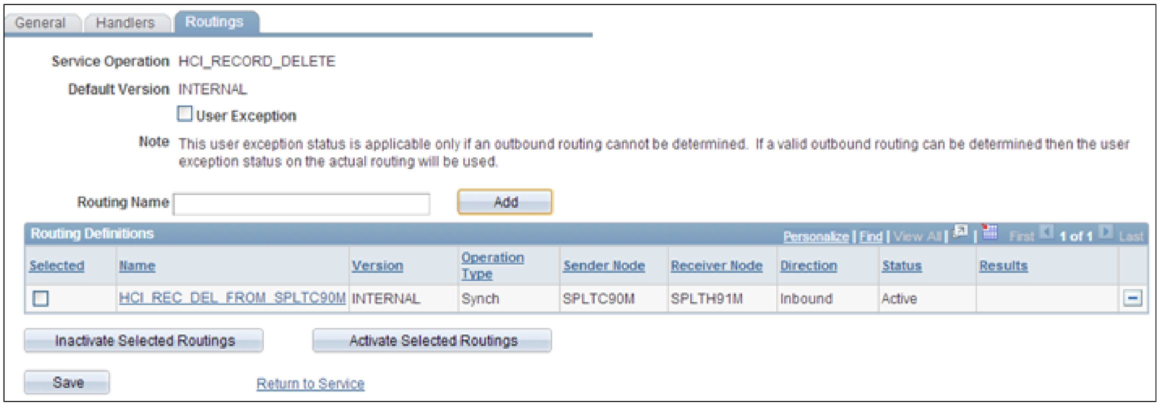
12. Click **Save** and then click **Return.**

13. Click **Save** on the Routings tab.

    This example illustrates the fields and controls on an example of the Service Operations – Routings page (HCM).



Important! Repeat the above steps in the HCM database for the following service operations: HCI_RECORD_GET and HCI_RECORD_PUT.

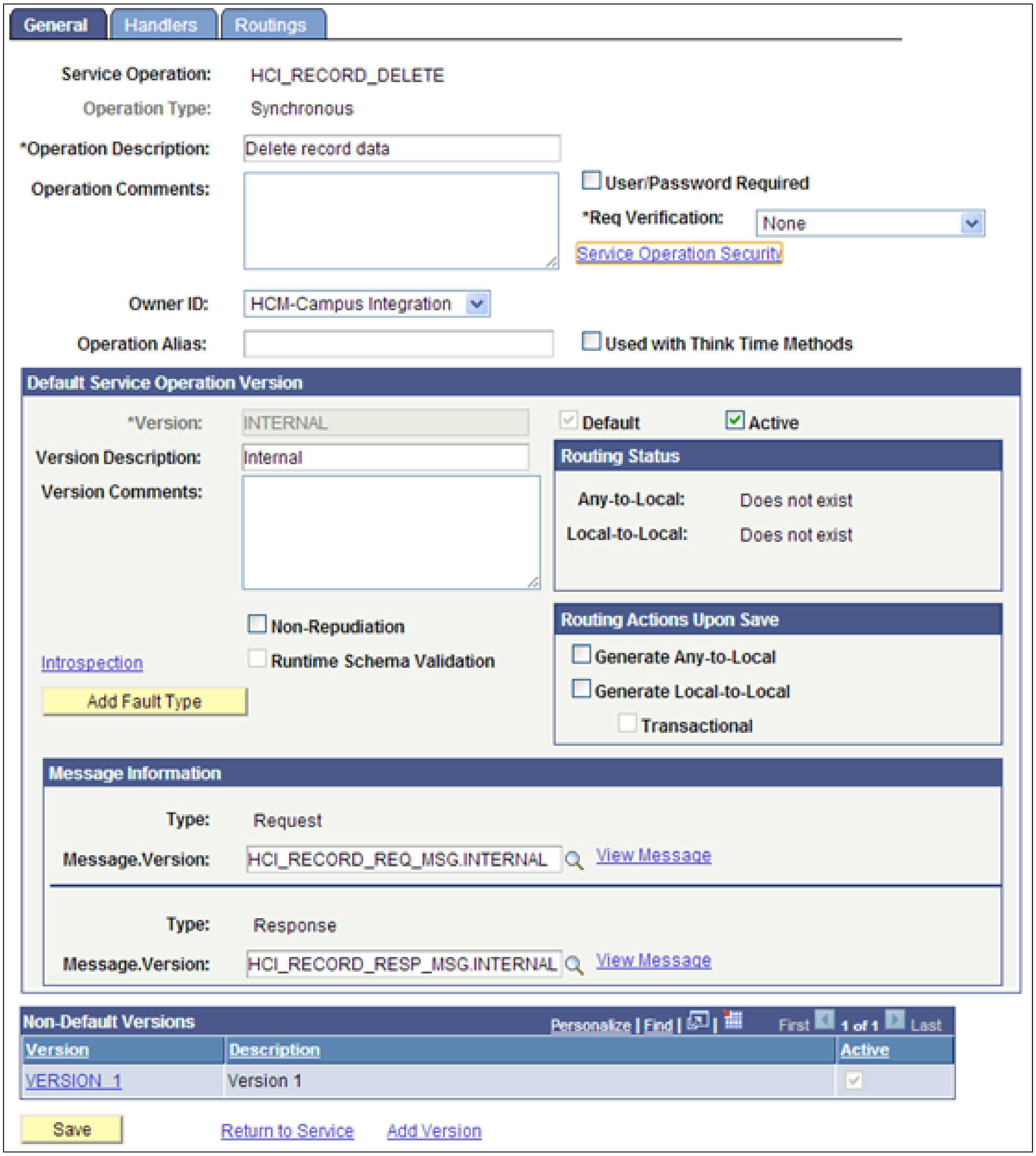
Configuring HCI_RECORD Service Operations in CS

The configuration steps are similar to those in the HCM database, with the following exceptions:

- Inactivated subscription handlers.
- Different routing transformations parameter settings.

1. Open **Service Operation** *HCI_RECORD_DELETE.*

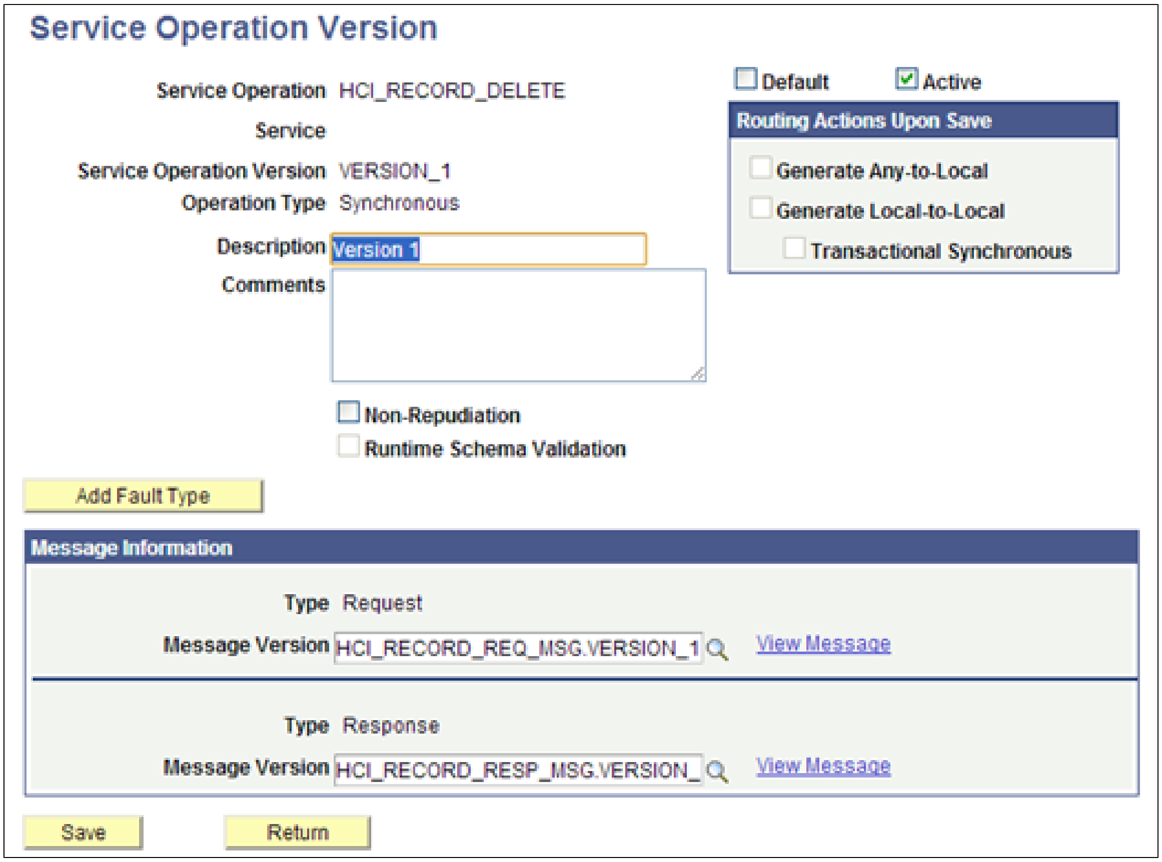
This example illustrates the fields and controls on an example of the General page (CS).



2. In the Default Service Operation Version group box, select the **Active** check box and click **Save**.

3. In the Non-Default Versions group box, click the *VERSION_1* link.

This example illustrates the fields and controls on an example of the Service Operation Version page (CS).



4. Select the **Active** check box and click **Save**.

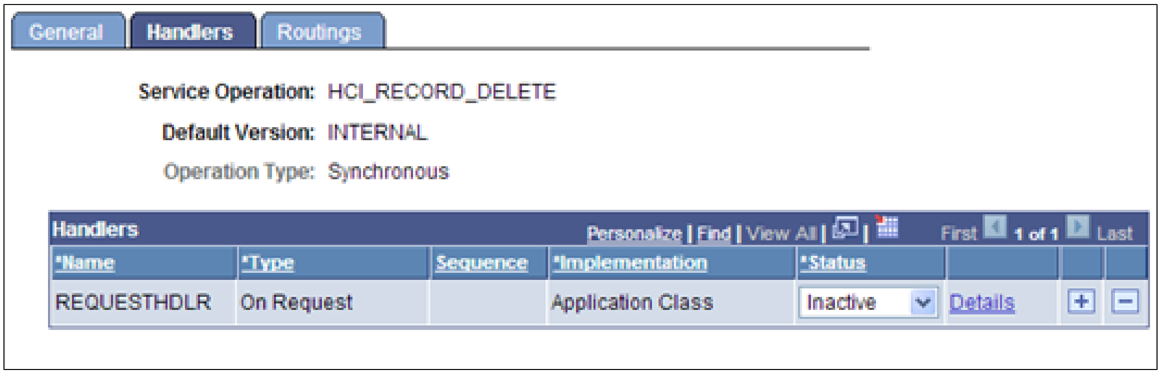
5. Click **Return**.

6. On the General page, click the **Service Operation Security** link and enter the appropriate permission list.

7. Click **Save**, then close the window.

8. Select the Handlers tab to confirm that the On-Request Handler is *Inactive*.

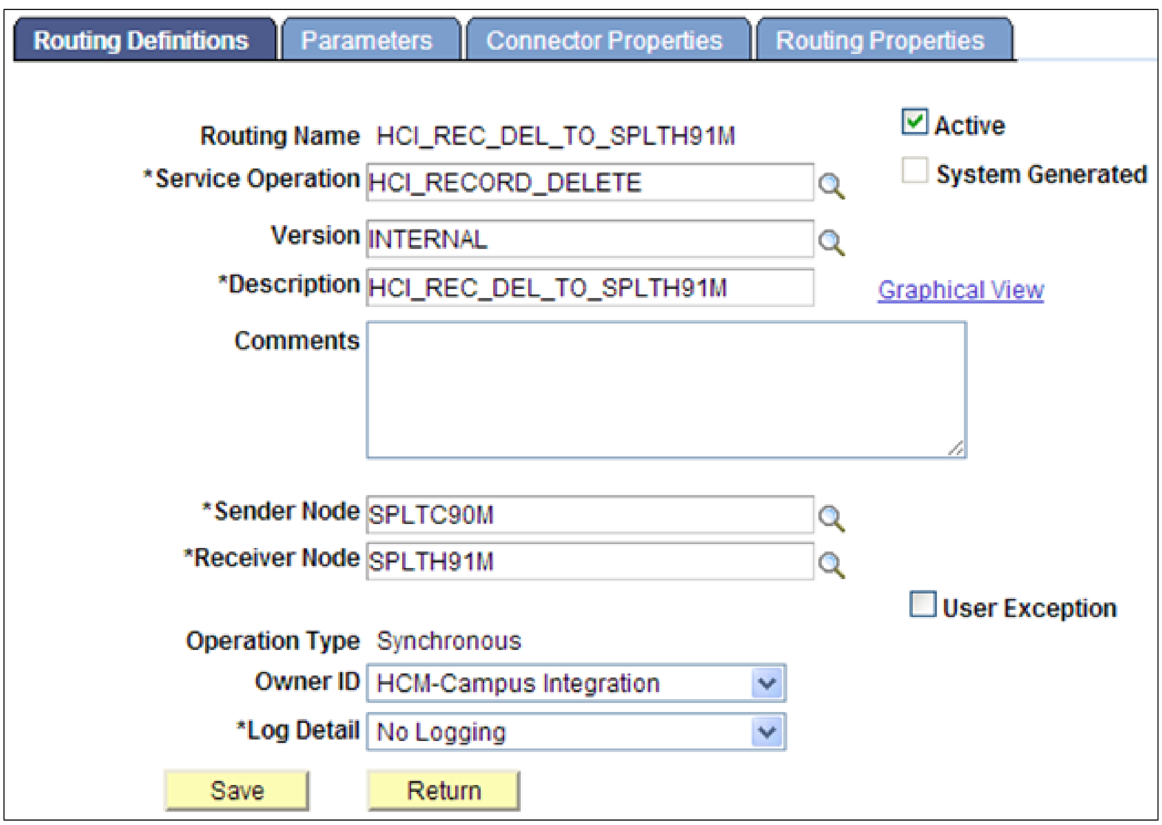
This example illustrates the fields and controls on an example of the Service Operations – Handlers page (CS).



9. Select the Routings tab to add a routing to the sender database.

   (In this example, the SPLTC90L database is the sender, so the routing is named *HCI_REC_DEL_TO_SPLTH91M*.)

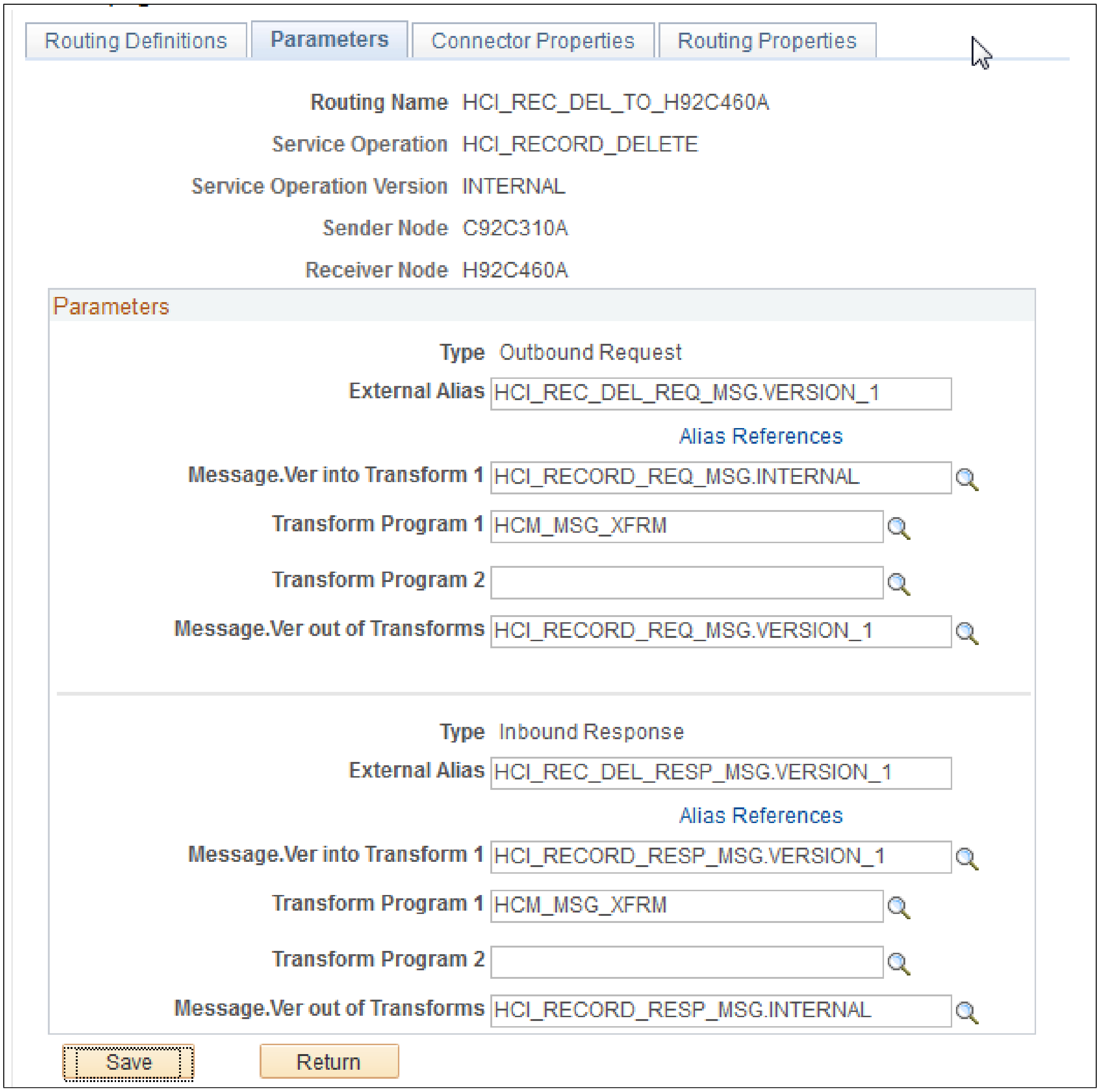
   This example illustrates the fields and controls on an example of the Routing Definitions page (CS).



10. Enter a **Description, Sender Node,** and **Receiver Node.**

11. On the Parameters tab, enter information as shown in the screenshot below:

This example illustrates the fields and controls on an example of the Parameters page (CS).



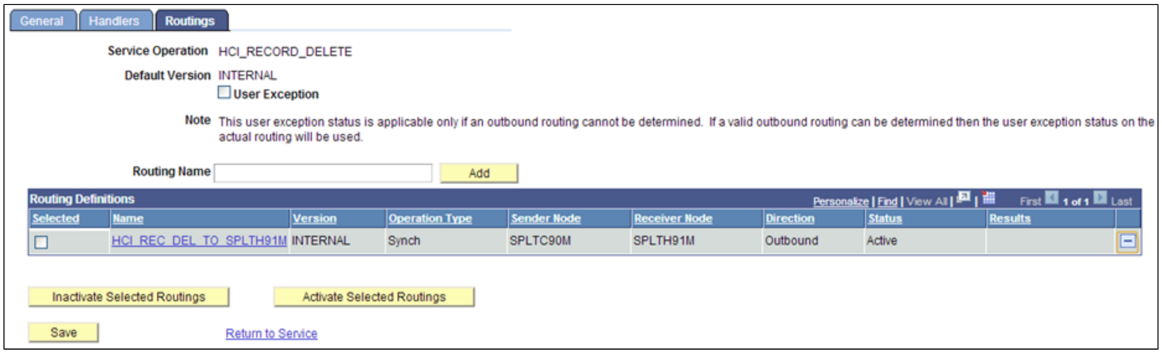
- The Inbound Request transformation program is *HCM_MSG_XFRM*.
- The Outbound Response transformation program is *HCM_MSG_XFRM*.
- The External Alias is changed to *VERSION_1* in both cases.

Note: On PeopleTools (PT) versions 8.55 and later, all synchronous transformation programs are replaced with HCM_MSG_XFRM. For earlier PT versions, the transformation program for requests is now HCM_MSG_XREQ; and HCM_MSG_XRSP for responses.

---

12. Click **Save** and then click **Return.**
13. Click **Save** on the Routings tab.

This example illustrates the fields and controls on an example of the Service Operations – Routings page (CS).



Important! Repeat the above steps in the CS database for the following service operations: HCI_RECORD_GET and HCI_RECORD_PUT.

Warning! The HCI_RECORD service is intended for use with the Synchronous Message resolution method of the Integration Integrity Utility only. The delivered service operations can – depending on security permission settings – perform data updates to any table in the system. As such, Security Administrators should carefully review which users will have access to the pages, record and permission mappings, and process settings related to this service. Improper use may result in data compromise or corruption. The HCI_RECORD_DELETE, HCI_RECORD_GET, and HCI_RECORD_PUT service operations should only be activated if the Synchronous Message Resolution method is to be used.

Running Discrepancy Comparison

The Run Discrepancy Comparison page is the primary run control page where you set the list of tables to be compared and the methods for the data compare. The process initiates a comparison of the data for the listed records between the databases, and logs discrepancy results in the Integration Discrepancies tables for review.

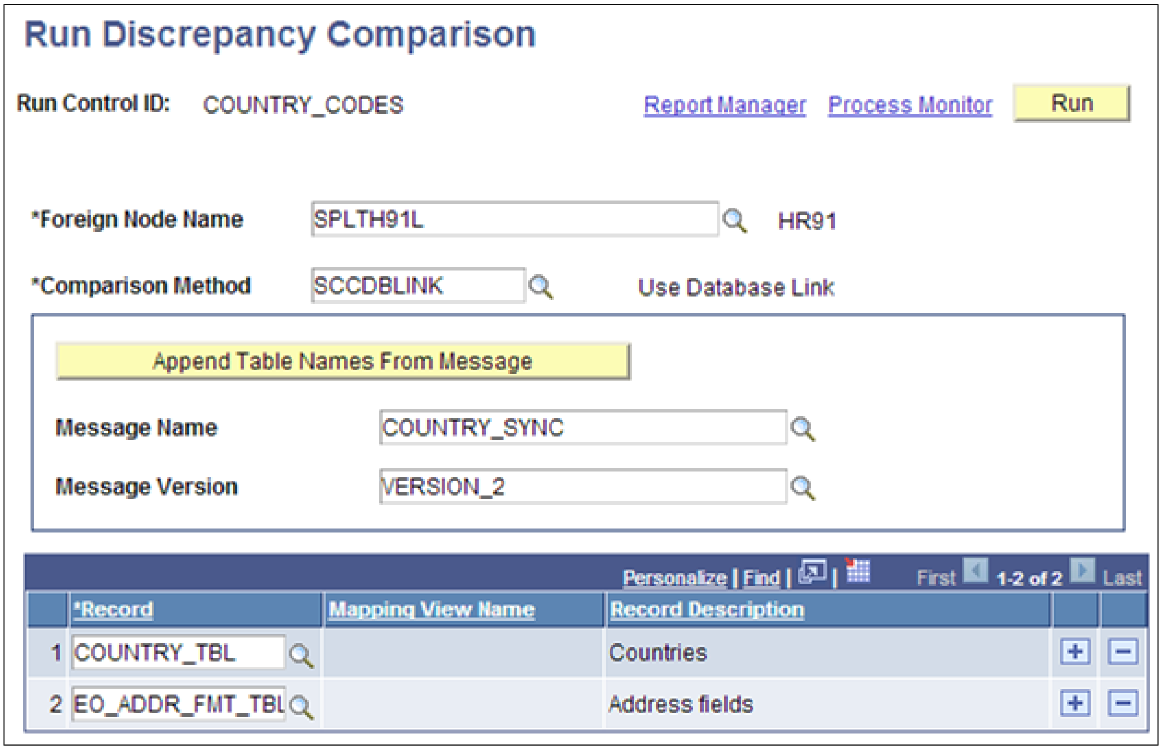
Individually add record names to the grid or populate a list of records from a message definition by using the Append Table Names from Message button.

Note: When populating the list of records from a message, choose the INTERNAL version of the message if it exists for the selected message name.

- Run the compare process as many times as desired for any set of tables. When a process is launched, any previous data discrepancy results for the same tables are deleted and refreshed with the latest results of the compare.
- If using the Database Link method, confirm that a Database Link Map is defined for all the records you specify. The process aborts if it does not find an entry in the Database Link Map table for the specified record.
- Confirm that Permission Maps are defined for all records you specify for comparison. Confirm that the user running the process has an appropriate permission list defined. The process aborts if it does not find an entry in the Permission Maps table for the record name being compared.

Access the Run Discrepancy Comparison page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Run Discrepancy Comparison**).

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



Field or Control	***Description***
Foreign Node Name	Enter the data source name; this must be a valid Integration Broker Node name.
Comparison Method	Select the comparison method to be used. The delivered choices include *SCCDBLINK* and *SCCJDBC*.
Append Table Names from Message	Click this button after the Message Name and Message Version fields are entered.
Message Name	Select the message name for which records are being compared.
Message Version	Select the desired message version.
Record	The base table being compared.
Mapping View Name	A view defined on the Record Map for the base table.

Field or Control	***Description***
Record Description	The description of the base table, or mapping view if defined.

Reviewing Integration Discrepancies

Once a comparison is run, all data discrepancies found by the process appear on the Integration Discrepancies page. The data results displayed in the Integration Discrepancies page are specific to each table name. Use the results to analyze the data that is out of sync, and then investigate its cause.

Once data discrepancies are resolved and the data is re-synced, they no longer appear on this page on subsequent comparisons of the table.

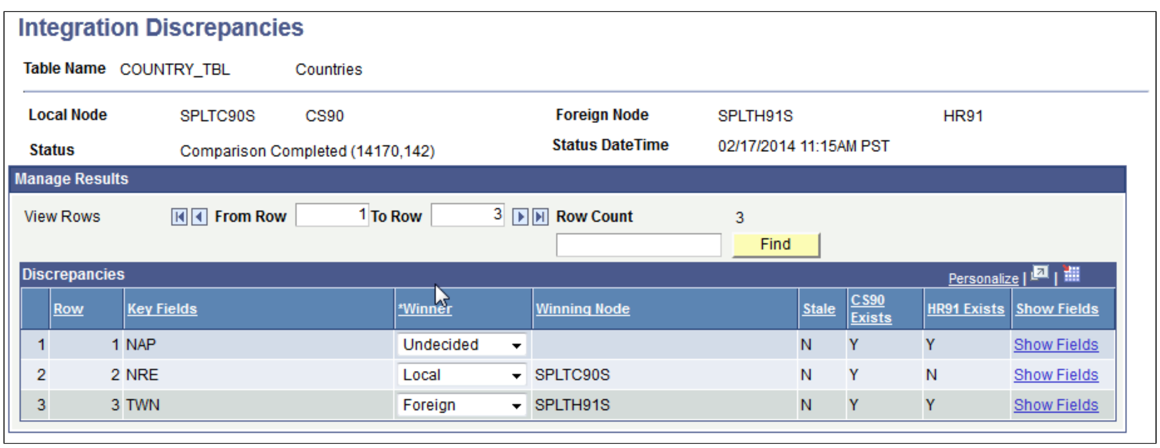
Data discrepancies due to errors in Integration Broker processing should be investigated and then resubmitted for proper Integration Broker handling.

Select the Winner value for all data rows that are to be re-synced using the Resolve Discrepancies process.

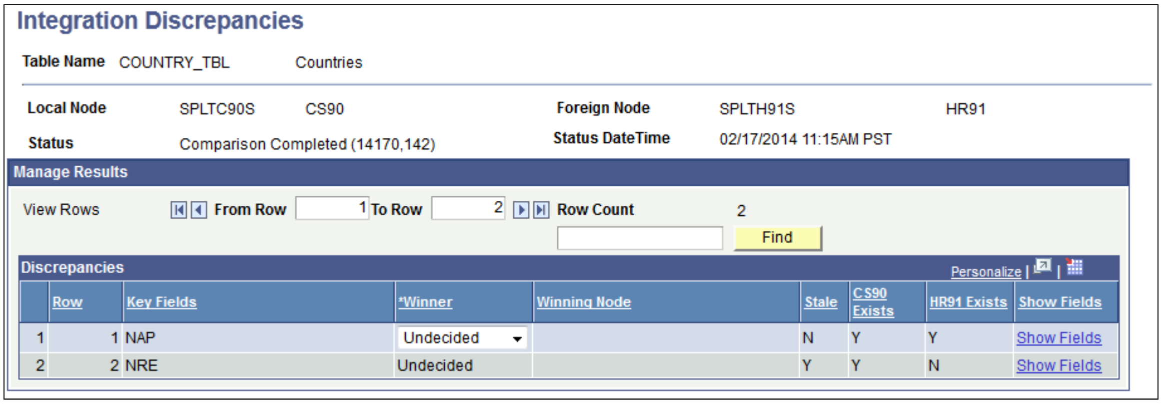
- *Foreign*: the row or values in the foreign node replace those in the local node.
- *Local:* the row or values in the local node replace those in the foreign node.
- *Undecided:* nothing changes

Access the Integration Discrepancies page by selecting the appropriate record name on the search record (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Integration Discrepancies.**).

This example illustrates the fields and controls on an example of the Integration Discrepancies page, after the initial comparison is done.



This example illustrates the fields and controls on an example of the Integration Discrepancies page, after the **Stale** data column = *Y* and the system has made the **Winner** field unavailable for entry.



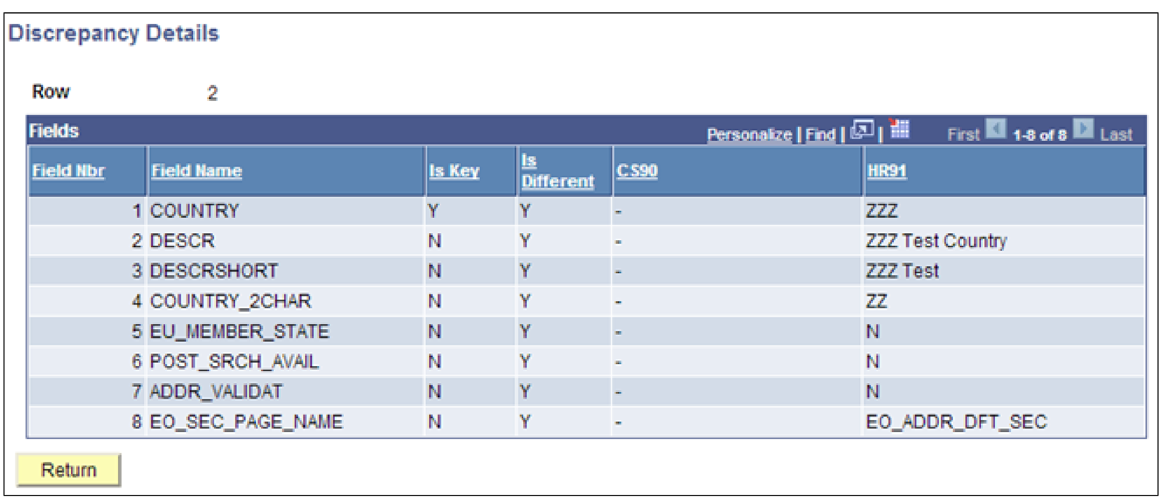
The page displays data rows that are missing in either of the database instances and where field values are different.

Field or Control	***Description***
View Rows	The Row Count shows the total number of data rows identified by the compare. Enter numbers in the **From Row** and **To Row** fields and then click the **Find** button to navigate between many rows.
Find	Enter a search value in the box and click this button to locate a value string within results.
Key Fields	The key field values for the data rows on the table that was compared.
Winner	Select the value for the resolution process to follow, if desired. Options are: *Undecided, Foreign,* or *Local.*
Winning Node	The description of the node set by the value selected in the **Winner** field.

Field or Control	***Description***
Stale	Indicates that the data has changed in the foreign or local database after the Discrepancy Comparison process was run. Y = Stale data conditions are detected. N = Data is unchanged since the Discrepancy Comparison process was run. When Stale = Y, the Resolve Discrepancies process has detected data that has changed since the Discrepancy Comparison process was run. The **Winner** field becomes unavailable for such rows. Investigate why this data may have changed. The next run of the Discrepancy Comparison process may no longer show a discrepancy for such rows of data if the values are back in sync.
Exists columns	The Local and Foreign node names appear in the column header and appear if the data row exists. Y = Yes exists in this node. N = No does not exist in this node.
Show Fields	Click the link to access the Discrepancy Details page. This page shows field value differences for the selected row.

Access the Discrepancy Details page (Click the **Show Fields** link for any row on the Integration Discrepancies page).

This example illustrates the fields and controls on the Discrepancy Details page.


Discrepancy Details

Row 2

Fields Personalize | Find | First 1-8 of 8 Last

Field Nbr	Field Name	Is Key	Is Different	CS90	HR91
1	COUNTRY	Y	Y	-	ZZZ
2	DESCR	N	Y	-	ZZZ Test Country
3	DESCRSHORT	N	Y	-	ZZZ Test
4	COUNTRY_2CHAR	N	Y	-	ZZ
5	EU_MEMBER_STATE	N	Y	-	N
6	POST_SRCH_AVAIL	N	Y	-	N
7	ADDR_VALIDAT	N	Y	-	N
8	EO_SEC_PAGE_NAME	N	Y	-	EO_ADDR_DFT_SEC

Return

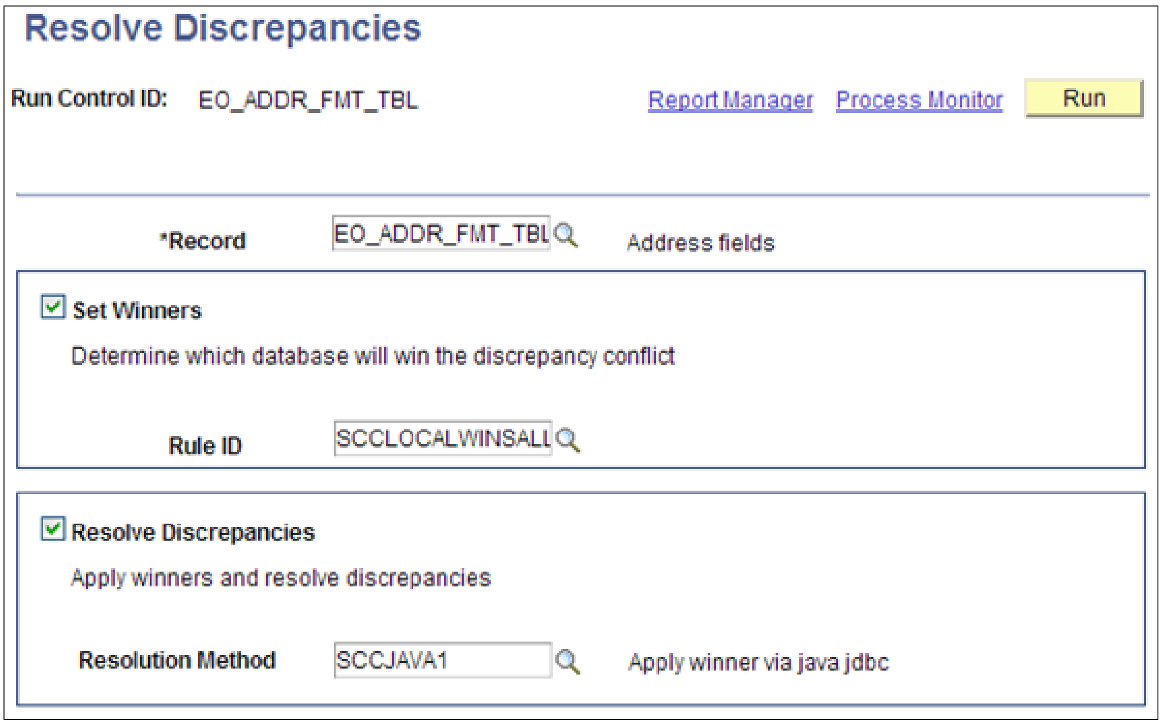
Resolving Integration Discrepancies

You can use the Resolve Discrepancies page to run the process for each table in which data discrepancies have been found, and that you determine should be updated through the resolution process. Winner dispositions are set on the Integration Discrepancies page. It is important to ensure that data rows selected to be updated by the resolution process have been thoroughly investigated and this method of re-sync is desired.

The resolution process is performed by table. Run the resolution process for all tables with data discrepancies. If there are multiple tables related to an entity, be sure all table data discrepancies are resolved.

Access the Resolve Discrepancies page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Resolve Discrepancies**).

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



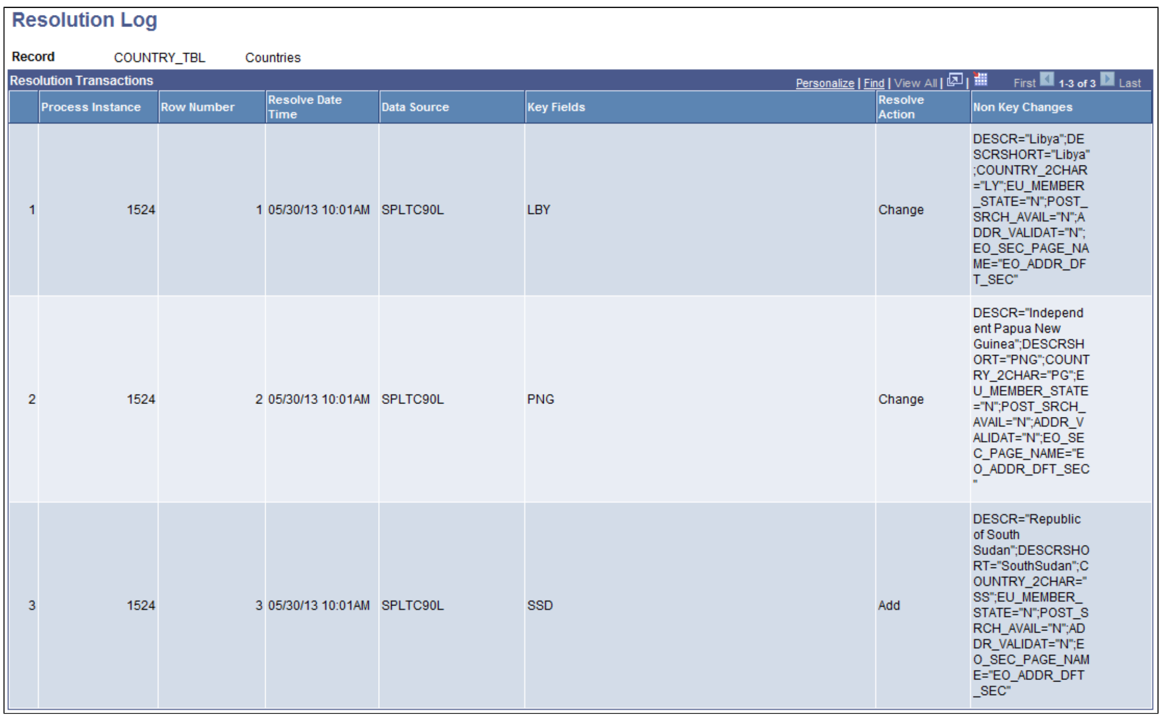
Field or Control	***Description***
Record	Select the table name where data discrepancies are being resolved.
Set Winners	Select the check box if a Winner Rule is to be used. If selected, the process updates all Undecided rows on the Integration Discrepancies page with the selected winner rule logic (such as local wins, foreign wins).
Rule ID	Select the Rule ID to use.

Field or Control	***Description***
Resolve Discrepancies	Select the check box to apply winners and update data values in the databases accordingly.
Resolution Method	Select the resolution method being used for the updates.

Reviewing the Resolution Log

Access the Resolution Log page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Resolution Log**).

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


Resolution Log

Record COUNTRY_TBL Countries

Resolution Transactions — Personalize | Find | View All | First 1-3 of 3 Last

	Process Instance	Row Number	Resolve Date Time	Data Source	Key Fields	Resolve Action	Non Key Changes
1	1524	1	05/30/13 10:01AM	SPLTC90L	LBY	Change	DESCR="Libya";DESCRSHORT="Libya";COUNTRY_2CHAR="LY";EU_MEMBER_STATE="N";POST_SRCH_AVAIL="N";ADDR_VALIDAT="N";EO_SEC_PAGE_NAME="EO_ADDR_DFT_SEC"
2	1524	2	05/30/13 10:01AM	SPLTC90L	PNG	Change	DESCR="Independent Papua New Guinea";DESCRSHORT="PNG";COUNTRY_2CHAR="PG";EU_MEMBER_STATE="N";POST_SRCH_AVAIL="N";ADDR_VALIDAT="N";EO_SEC_PAGE_NAME="EO_ADDR_DFT_SEC"
3	1524	3	05/30/13 10:01AM	SPLTC90L	SSD	Add	DESCR="Republic of South Sudan";DESCRSHORT="SouthSudan";COUNTRY_2CHAR="SS";EU_MEMBER_STATE="N";POST_SRCH_AVAIL="N";ADDR_VALIDAT="N";EO_SEC_PAGE_NAME="EO_ADDR_DFT_SEC"

When you run the Resolve Discrepancies process, the system logs all data discrepancies that are updated and displays them on this page. The log entries provide an audit history of the data updated through this process.

Field or Control	***Description***
Process Instance	The Resolve Discrepancies process instance used.
Row Number	The row number from the Integration Discrepancies page that is updated.

Field or Control	***Description***
Resolve Date/Time	The date and time when the Resolve Discrepancies process updated the row of data.
Data Source	The database that was used to provide the winner data values.
Key Fields	The key value(s) for the data row that has been updated.
Resolve Action	The action taken on the data row. Delivered values include: *Add, Change,* and *Delete.*
Non Key Changes	The value(s) for the additional non-key fields in the data row that has been updated.

Purging the Resolution Log

Access the Purge Resolution Log page (**Set Up SACR** > **System Administration** > **Utilities** > **HCM Integration** > **Purge Resolution Log**).

The Purge Resolution Log process removes unwanted history rows from the Transaction Log table. Run this process as frequently as desired. The system deletes data rows purged by this process from the database. Carefully consider your record retention policies to determine with what frequency you run this process.

Field or Control	***Description***
Transaction Age	Enter the number of days' worth of history rows to delete. For example, *30* causes the system to remove all rows dated 30 days prior to the current system date. The default value is 0 (zero) and when the process runs, all rows from the Resolution Log table are deleted.

Examples of Integration Discrepancies

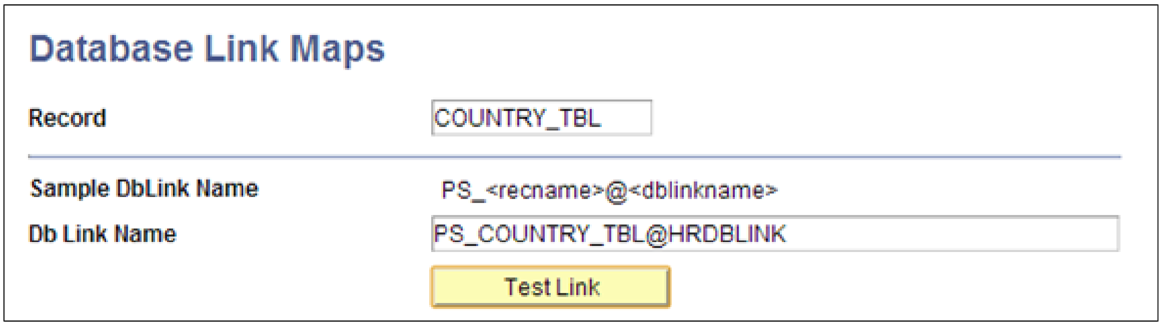
The following are examples of setting up, running, and viewing Integration Discrepancies.

Example: Country Codes COUNTRY_SYNC (Tables: COUNTRY_TBL, EO_ADDR_FMT_TBL)

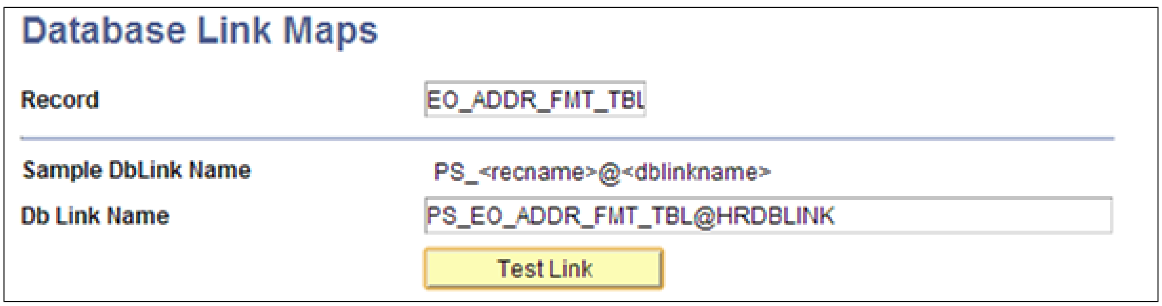
- No Record Maps required (tables do not include audit fields, and so on).
- CS – HCM.
- Using SCCDBLINK Database Link compare method.
- Data will be resolved using the Local Wins All winner rule.

1. Database Link *HRDBLINK* created on the CS database server. (not shown here).
2. Database Link Maps for the tables included in COUNTRY_SYNC.

   This example illustrates the fields and controls on an example of the Database Link Maps page for the COUNTRY_TBL record.

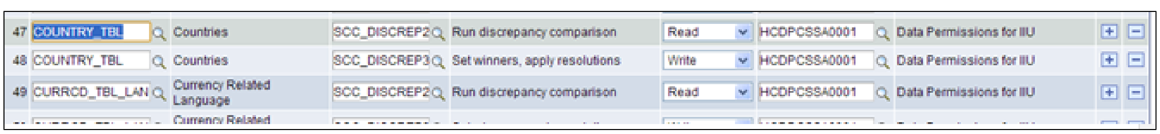


   This example illustrates the fields and controls on an example of the Database Link Maps page for the EO_ADDR_FMT_TBL record.



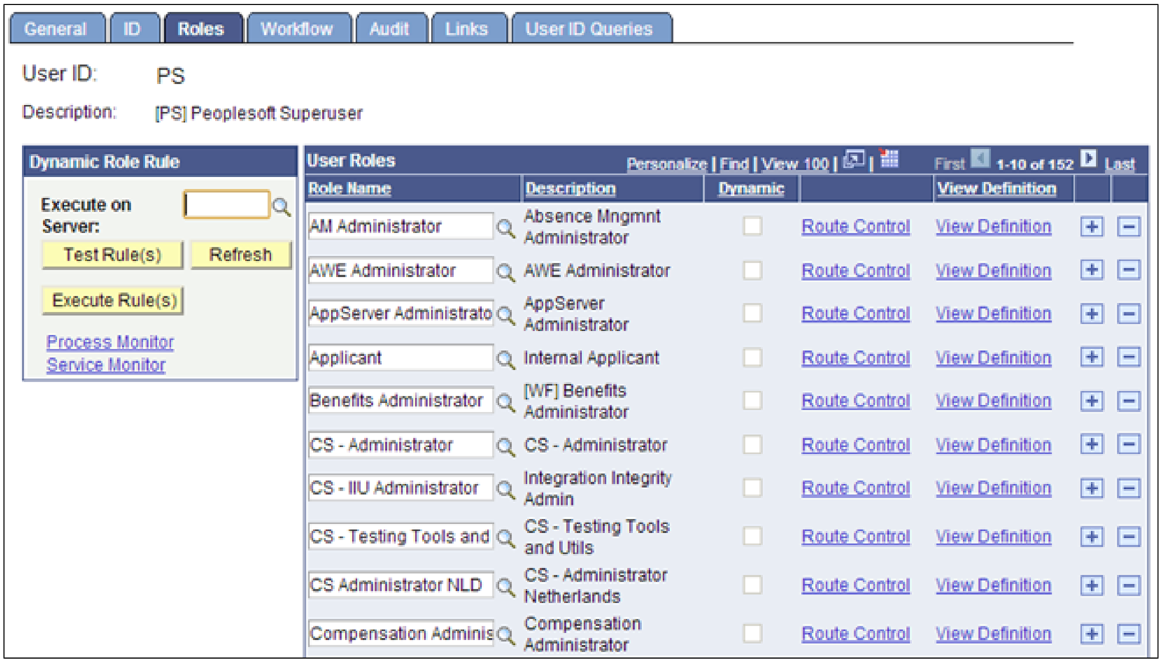
3. Confirm tables are listed in CS Permission Maps.

   This example illustrates the fields and controls on an example of the CS Permission Maps list.



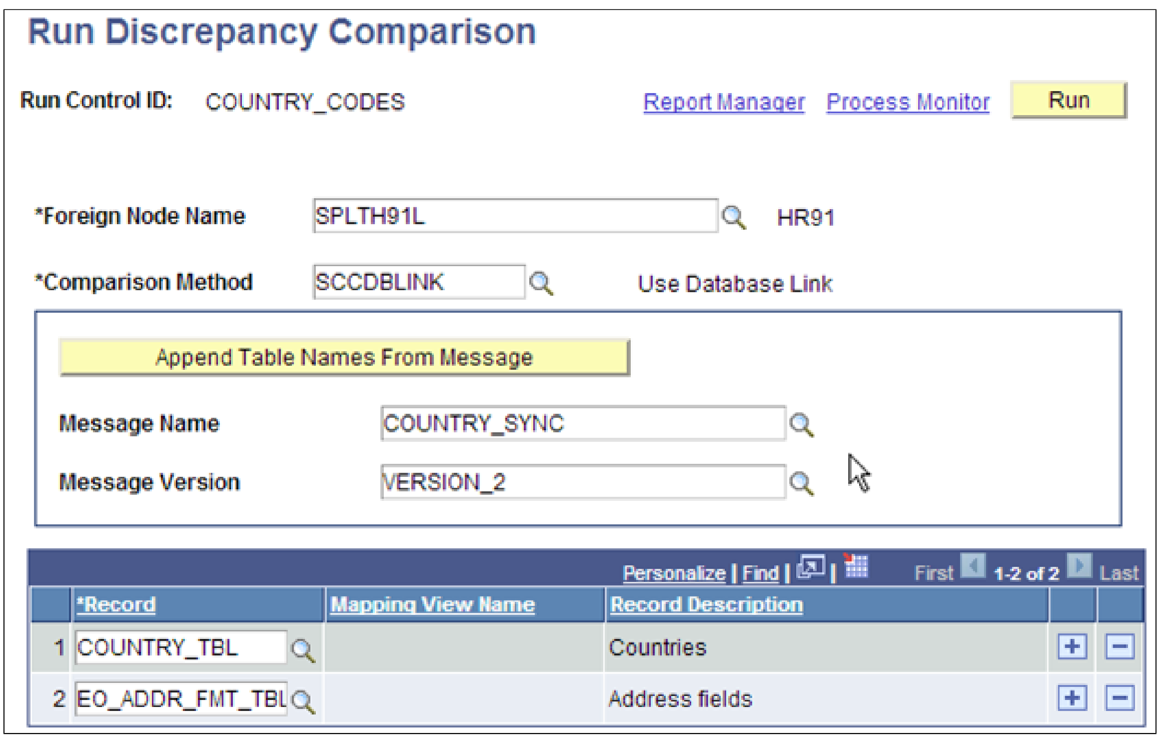
4. Confirm User ID has an assigned **Role** of *CS – IIU Administrator* (this includes the data permission list for record permissions).

This example illustrates the fields and controls on an example of the Roles page.

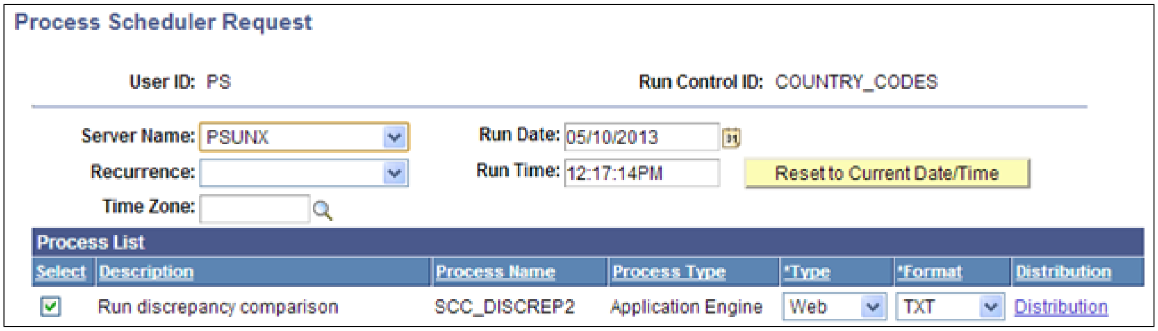


5. Run the Discrepancy Comparison process.

This example illustrates the fields and controls on an example of the Run Discrepancy Comparison page.

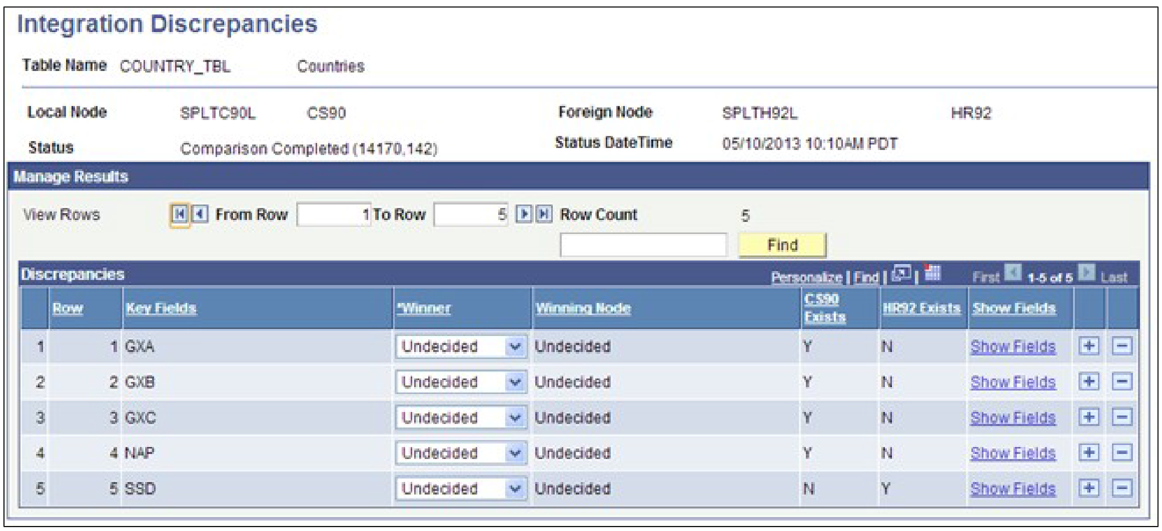


This example illustrates the fields and controls on an example of the Process Scheduler Request page.

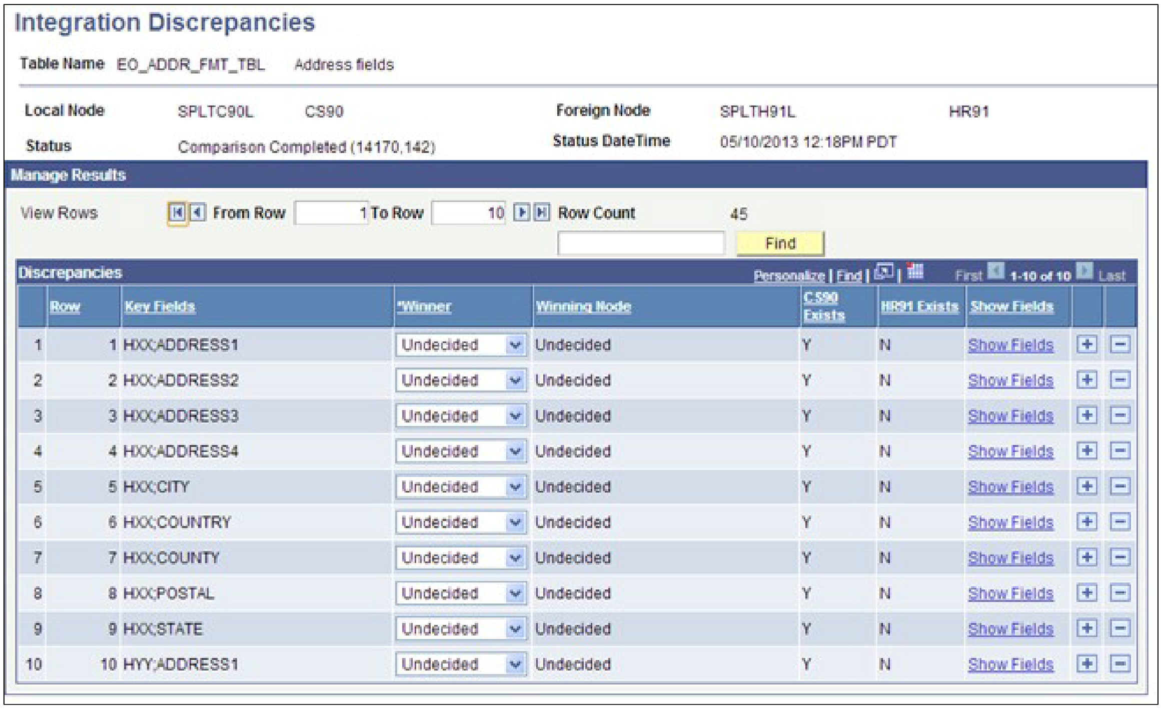


6. Review Integration Discrepancies for both tables.

   This example illustrates the fields and controls on an example of the Integration Discrepancies page for COUNTRY_TBL.



This example illustrates the fields and controls on an example of the Integration Discrepancies page for EO_ADDR_FMT_TBL.



Integration Discrepancies

Table Name EO_ADDR_FMT_TBL Address fields

Local Node SPLTC90L CS90 Foreign Node SPLTH91L HR91

Status Comparison Completed (14170,142) Status DateTime 05/10/2013 12:18PM PDT

Manage Results

View Rows From Row 1 To Row 10 Row Count 45

Find

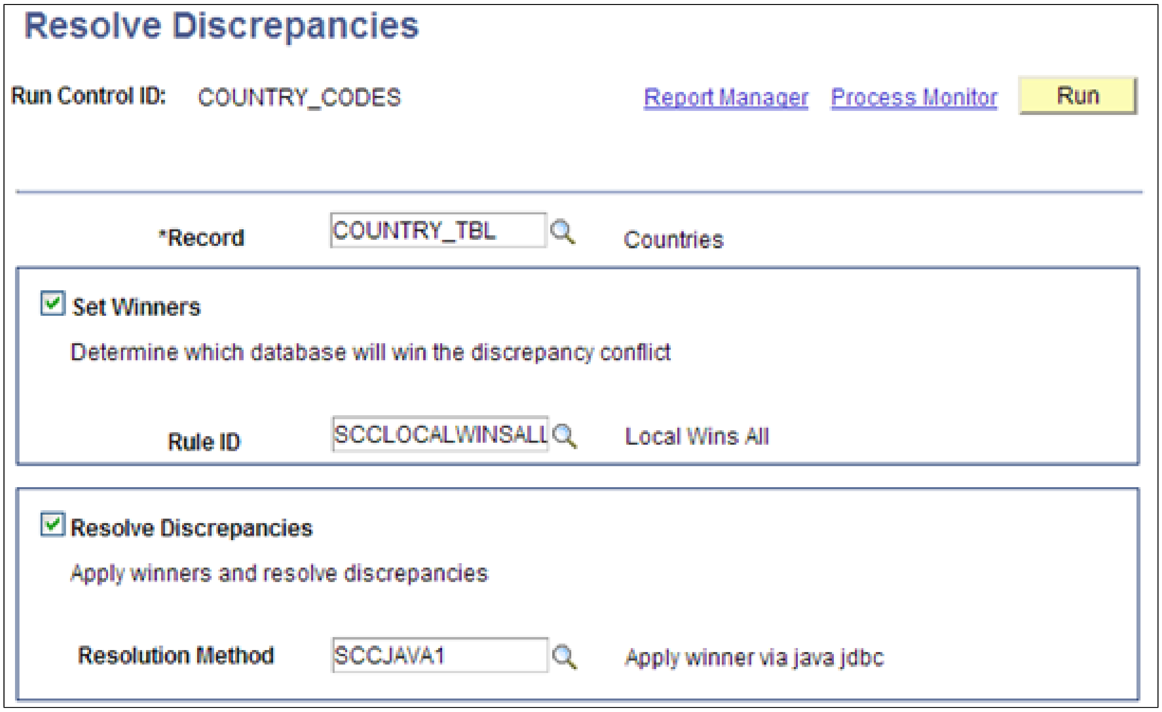
Discrepancies Personalize | Find | First 1-10 of 10 Last

	Row	Key Fields	*Winner	Winning Node	CS90 Exists	HR91 Exists	Show Fields
1	1	HXX;ADDRESS1	Undecided	Undecided	Y	N	Show Fields
2	2	HXX;ADDRESS2	Undecided	Undecided	Y	N	Show Fields
3	3	HXX;ADDRESS3	Undecided	Undecided	Y	N	Show Fields
4	4	HXX;ADDRESS4	Undecided	Undecided	Y	N	Show Fields
5	5	HXX;CITY	Undecided	Undecided	Y	N	Show Fields
6	6	HXX;COUNTRY	Undecided	Undecided	Y	N	Show Fields
7	7	HXX;COUNTY	Undecided	Undecided	Y	N	Show Fields
8	8	HXX;POSTAL	Undecided	Undecided	Y	N	Show Fields
9	9	HXX;STATE	Undecided	Undecided	Y	N	Show Fields
10	10	HYY;ADDRESS1	Undecided	Undecided	Y	N	Show Fields

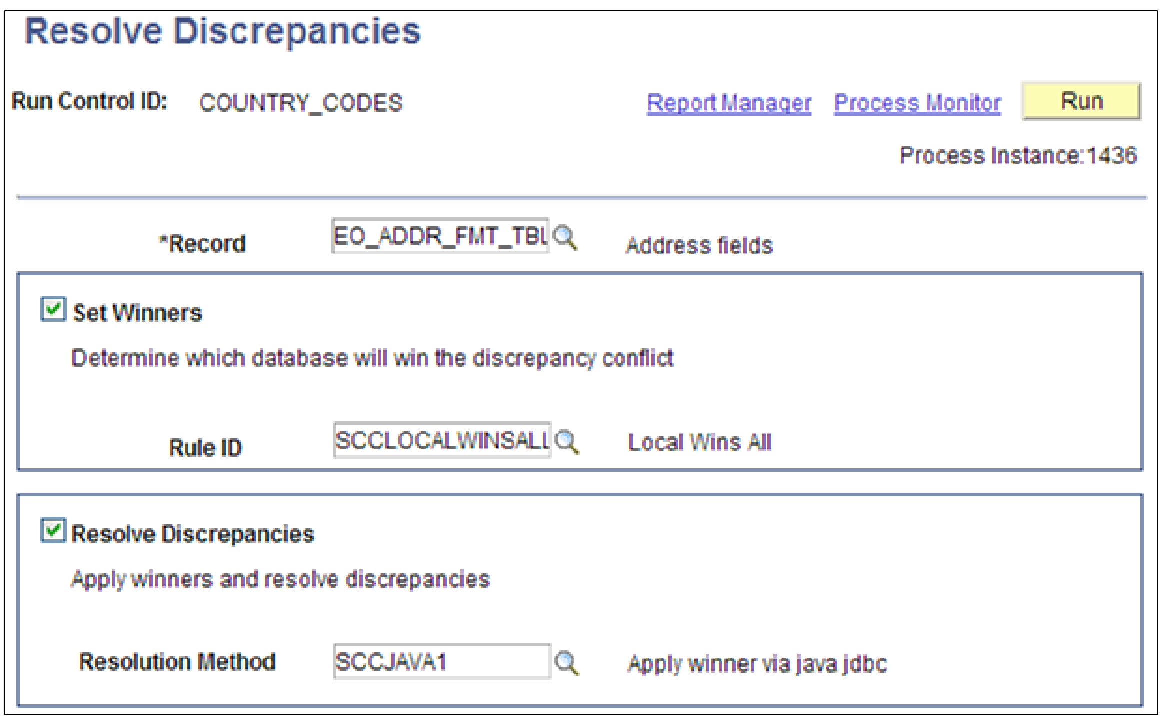
7. Review data to determine that no discrepancies are due to blocked Integration Broker queue issues.
8. Use the Resolution Process with Java JDBC method to update all rows to use the Local Wins All winner rule.

   All CS values will be updated to the HCM database.
9. Resolve parent COUNTRY_TBL rows first, then run the Resolve Discrepancies process.

This example illustrates the fields and controls on an example of the Resolve Discrepancies page for COUNTRY_TBL.



This example illustrates the fields and controls on an example of the Resolve Discrepancies page for EO_ADDR_FMT_TBL.



10. Confirm that the data was updated by first reviewing Integration Discrepancies (search does not include the tables). Then review data in the HCM database to confirm that the updates were successful.

Chapter 9

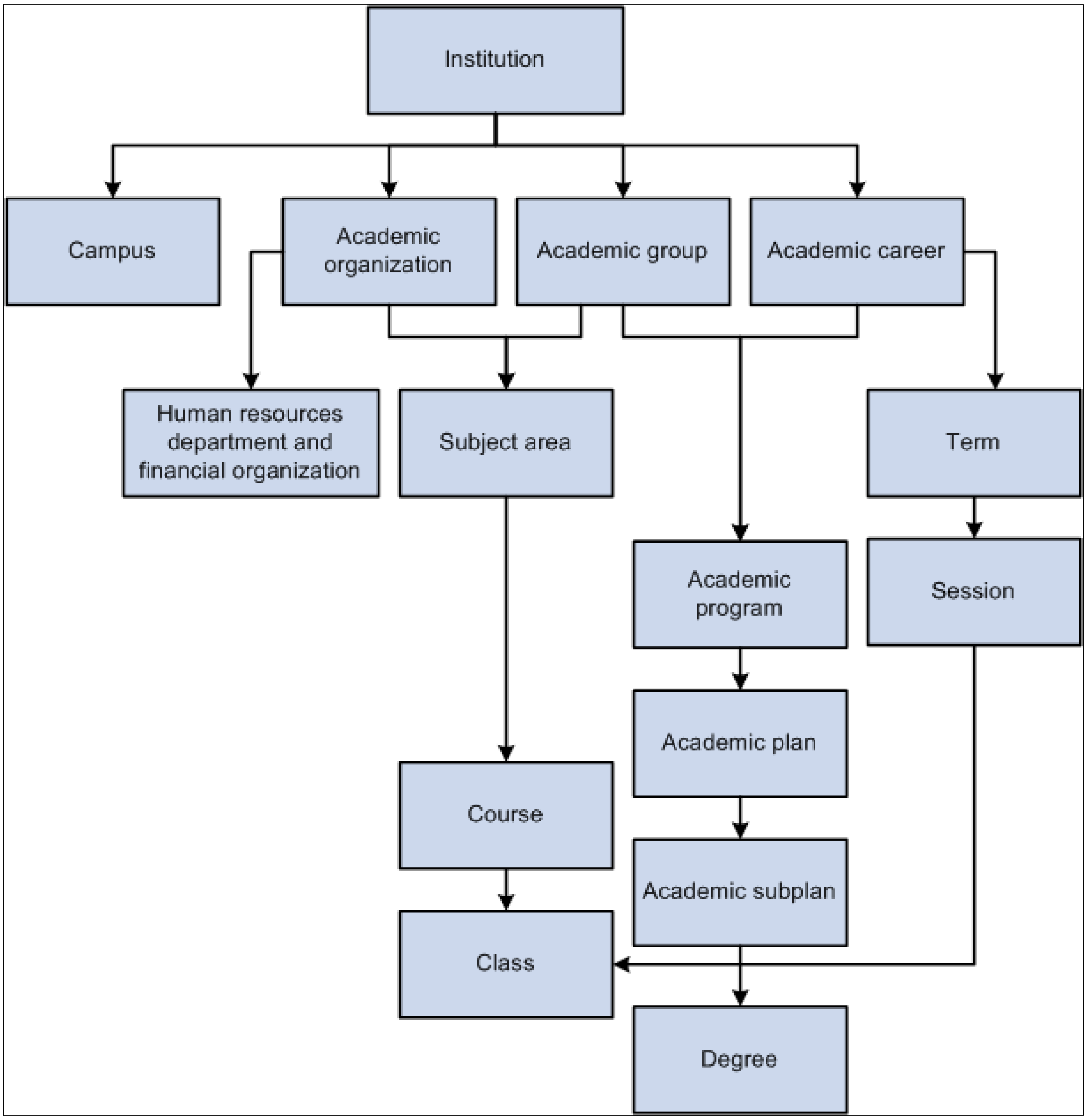
Designing Your Academic Structure

Understanding Academic Structure

Set up your academic structure before using the full functionality of the PeopleSoft Campus Solutions system. Make sure that you understand how the institution structures campuses, academic careers, academic organizations, academic departments or groups, and subject areas.

The academic structure and its elements are the building blocks for an academic institution. This diagram illustrates an institution's academic structure at a high level:

High-level illustration of academic structure, from institution down to degree.



An academic institution can have many campuses. Academic programs are part of academic careers and the academic institution. Subject areas are part of academic organizations and the academic institution. Academic plans and academic subplans are subdivisions of academic programs. Degree records are directly linked to academic plans. Courses and classes are subdivisions of subject areas and directly linked to terms and sessions.

Defining Academic Institutions

To set up academic institutions, use the Academic Institution Table component (INSTITUTION_TBL).

An academic institution is an entity, such as a university or college, that runs independently from other like entities and has its own set of rules and business processes. Typically, you define just one academic institution, but you can define as many as you need. Throughout Campus Solutions, you use academic institutions as a key value to group data into tables and to search those tables for data to extract.

This section lists prerequisites and discusses how to:

- Define the name and location of academic institutions.
- Set academic institution defaults and options.
- Set additional institution defaults and options.
- Activate instructor workload.
- Set repeat checking controls.
- (AUS, CAN, NZL, NLD) Activate other Student Administration features.
- Identify self-service report types.
- Enable Program Enrollment and Activity Management defaults.
- Map affiliation codes to administrator roles.

Prerequisites

You must decide whether you want a single- or a multi-institution structure. Set up separate academic institutions only if the entities function as distinctly separate schools. Each academic institution must have these characteristics:

- Separate schedule of classes.

  Course catalogs are shared among institutions.
- Independent statistics and transcripts.
- Students who do not normally enroll in classes from one academic institution while attending another academic institution.

  For example, although you might have a law school that is a separate entity in many ways, the law students might sometimes enroll in graduate courses as part of their law careers.

Also, before establishing academic institutions, define these items:

- SetIDs

  A setID is used throughout Campus Solutions as a substitute for an academic institution or a student financials business unit. Instead of keying a number of tables by academic institution or business unit, the tables are keyed by setID, which enables institutions to share common codes, structures, and facilities.
- Grading schemes

  Grading schemes are the rules that the academic institution uses for assigning and converting grades.
- Country codes

Country codes enable you to define the address for the academic institution in the address format appropriate for the country in which the academic institution is located.

Related Links

"Understanding Business Units" (Student Financials)

"Designing Campus Community" (Campus Community Fundamentals)

"Defining Grading Schemes" (Student Records)

Pages Used to Define Academic Institutions

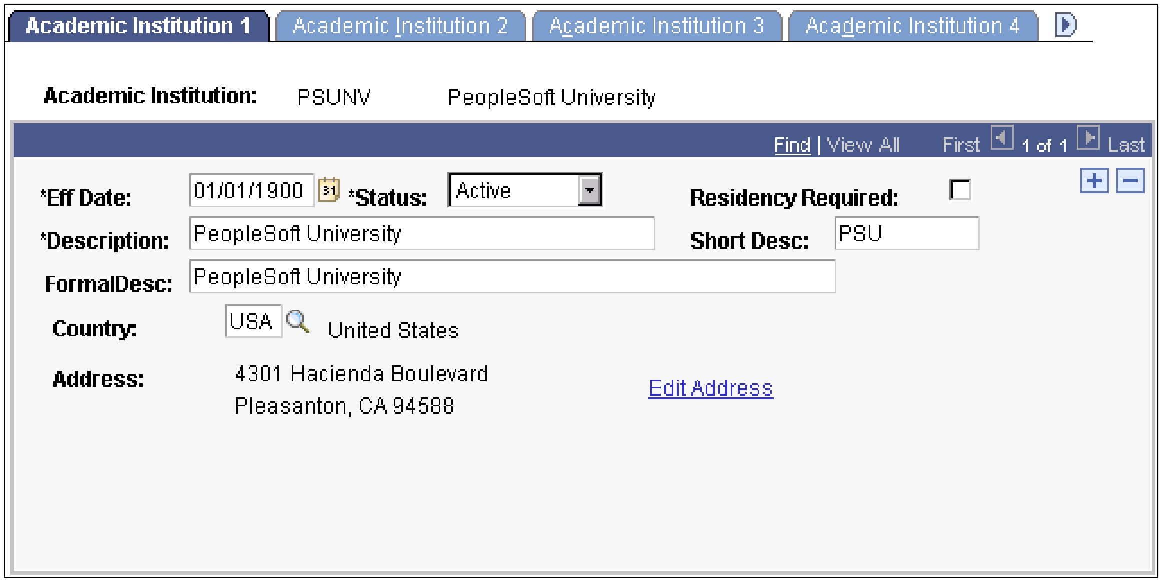
Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Institution 1	INSTITUTION_TABLE	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 1**	Define the name and location of the academic institutions.
Academic Institution 2	INSTITUTION_TABLE1	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 2**	Set academic institution defaults for transfer credit processing and for courses.
Academic Institution 3	INSTITUTION_TABLE3	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 3**	Set additional academic institution defaults and options for attendance tracking, cohort reporting, academic shifts, National Student Clearinghouse (NSC) reporting, and interoperability for learning management systems (LMS).
Academic Institution 4	INSTITUTION_TABLE4	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 4**	Activate the Instructor Workload feature and establish high-level limits, workload preferences, and default values for instructor workload at the institution.
Academic Institution 5	INSTITUTION_TABLE5	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 5**	Set repeat checking controls for academic institutions. The academic institution level is the highest level of control for the automatic Repeat Rule Checking COBOL/SQL process (SRPCERPT).

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Institution 6	SSR_INST_FEATURES	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 6**	Set up student administrative functionality that can be selected or cleared, such as Canadian Reporting.
Academic Institution 7	SAA_INST_RPT_SETUP	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 7**	Identify the advisement report types to be used in self service and the Fluid interface.
Academic Institution 9	SSR_INST_PE	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 9**	Enable Program Enrollment and Activity Management defaults.
Academic Institution 10	SSR_ADMN_TYPAFL	**Setup SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 10**	Map affiliation codes to administrator roles.
Schools	HC_P_SCHOOL_TABLE_GBL	**Setup Common Objects** > **Common definitions** > **School Information** > **Schools**	Define codes for specific schools. The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.
Majors	HC_P_MAJOR_TABLE_GBL	**Setup Common Objects** > **Common definitions** > **School Information** > **Majors**	Define codes for areas of study most commonly associated with school degrees or certificates.

Defining the Name and Location of Academic Institutions

Access the Academic Institution 1 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 1**).

This example illustrates the fields and controls on the Academic Institution 1 page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Residency Required	Select to require residency data for students. Your selection appears in the **Residency Required** field on the Academic Program page for all academic programs within this academic institution. You can modify the selection for specific academic programs. When you attempt to activate a student into a term, the Term Activation SQR process (SRTRMAC) checks whether a student's academic program requires that the student have residency data in the system. If it does and the student does not have residency data in the system, the Term Activation process does not activate the student into the term. This inactivation subsequently blocks the student from class enrollment and tuition calculation.
Country	Enter the country where this academic institution is located. Exit the field to populate the page with variable address fields. The address fields that appear depend on the country selected. Enter the primary location of this academic institution into the applicable fields.

Related Links

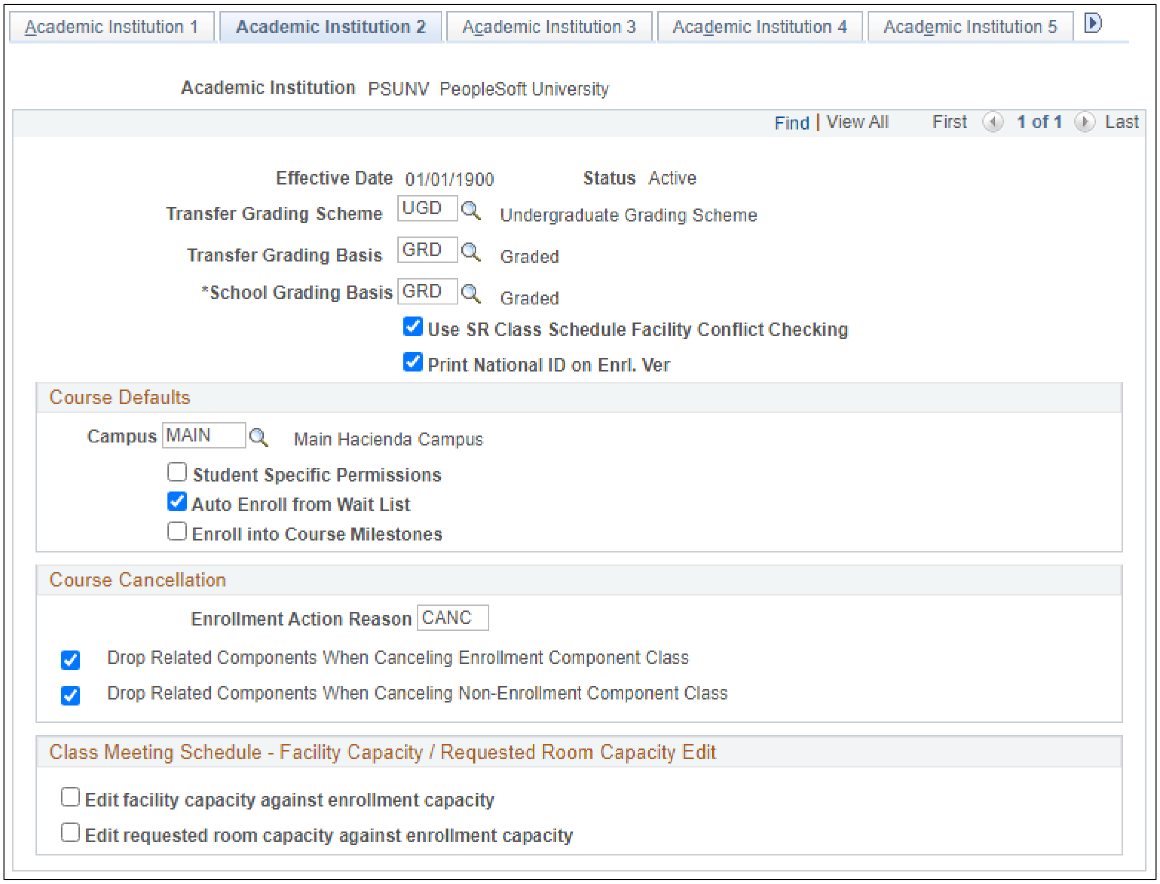
“Setting Up Residency Rules” (Campus Community Fundamentals)

“Entering Residency Data” (Campus Community Fundamentals)

Setting Academic Institution Defaults and Options

Access the Academic Institution 2 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 2.**).

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



Field or Control	***Description***
Transfer Grading Scheme	Enter the default grading scheme that applies to courses that students transfer from external organizations to this academic institution. Your selection appears in the **Grading Scheme** field on the Organization Affiliation page, based on the academic institution that you enter on that page.
Transfer Grading Basis	Enter the default grading basis that applies to courses that students transfer from external organizations to this academic institution. Your selection appears in the **Grading Basis** field on the Organization Affiliation page, based on the academic institution that you enter on that page.
School Grading Basis	Currently not in use.

Field or Control	*Description*
Use SR Class Schedule Facility Conflict Checking	Select to indicate that the system uses internal facility conflict checking functionality for all campuses at this academic institution. The system checks for facility conflicts whenever a facility is booked for a class on the Meetings page or the Exam page of the schedule of classes components. The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process. **Note:** This check box has no relation to the **Check for Facility Conflict** check box on the Facility Table page, which controls whether you can schedule multiple events in the same facility.
Print National ID on Enrl. Ver (print national ID on enrollment verification)	Select to have the system display the student's national ID on the enrollment verification report. The system selects this check box by default.

Course Defaults

Use this group box to set default values for the course catalog and schedule of classes pages. These default values simplify data entry. You can override these default values for individual courses and classes.

Field or Control	*Description*
Campus	Enter the default campus for all courses within this academic institution. The campus value appears by default in the course catalog and the schedule of classes. **Note:** If this academic institution generally offers the same courses at more than one campus, you should not enter a value for a default campus because courses defined for a particular campus can be scheduled only for that same campus.
Student Specific Permissions	Select to have all classes scheduled at this academic institution require that you generate permissions for students to enroll in classes. This check box value migrates to the Basic Data page of the Schedule New Course component, where it can be overridden. Student-specific permissions require that you generate permissions for individual students.

Field or Control	Description
Auto Enroll from Wait List	Select to have the system automatically enroll students from wait lists into classes whenever space becomes available in the classes and the wait list process is run. This check box value migrates to the Enrollment Control page of the Schedule New Course component, where it can be overridden.
Enroll into Course Milestones	Select this check box to enable a course milestone to be created when a student enrolls in a class for which the milestone is selected on the Course/Milestone Link page in the Course Catalog. The **Enroll into Course Milestones** check box must also be selected on the Academic Career Table 2 page. See Defining Academic Careers. See “Creating Course Offerings” (Student Records).

Course Cancellation

Field or Control	Description
Enrollment Action Reason	Enter the default enrollment action reason that the system posts to enrolled students' records whenever a class is canceled.
Drop Related Components When Canceling Enrollment Component Class	This check box is selected by default. Clear this check box if you do not want to drop related components when you cancel the enrollment component of a multiple component class.
Drop Related Components When Canceling Non-Enrollment Component Class	This check box is selected by default. Clear this check box if you do not want to drop related components when canceling a non-enrollment component of a multiple component class.

Class Meeting Schedule - Facility Capacity / Requested Room Capacity Edit

Use this region to set whether to show a warning or rejection message when the schedule or enrollment capacity exceeds the requested facility or room capacity limit. When you add the facility to the Meetings page, CS looks at the information in this table to determine whether to show a warning or rejection message.

Field or Control	***Description***
Edit facility capacity against enrollment capacity	Select this option to decide whether you want to display a warning or rejection message when the enrollment capacity for classes or sections exceeds facility capacity.
Edit requested room capacity against enrollment capacity	Select this option to decide whether you want to display a warning or rejection message when the enrollment capacity for classes or sections exceeds room capacity.

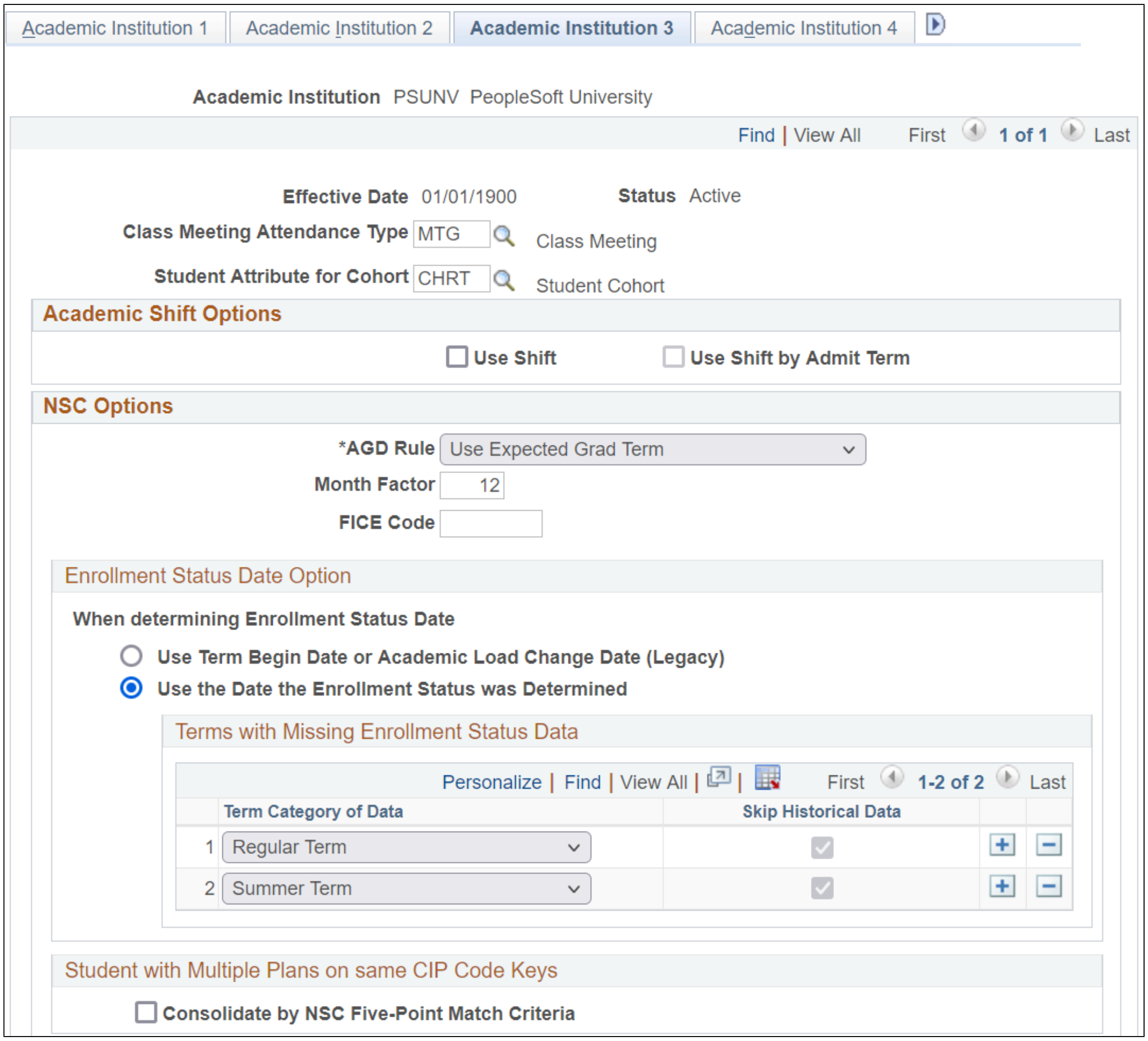
Related Links

“Defining Facilities and Rooms” (Student Records)

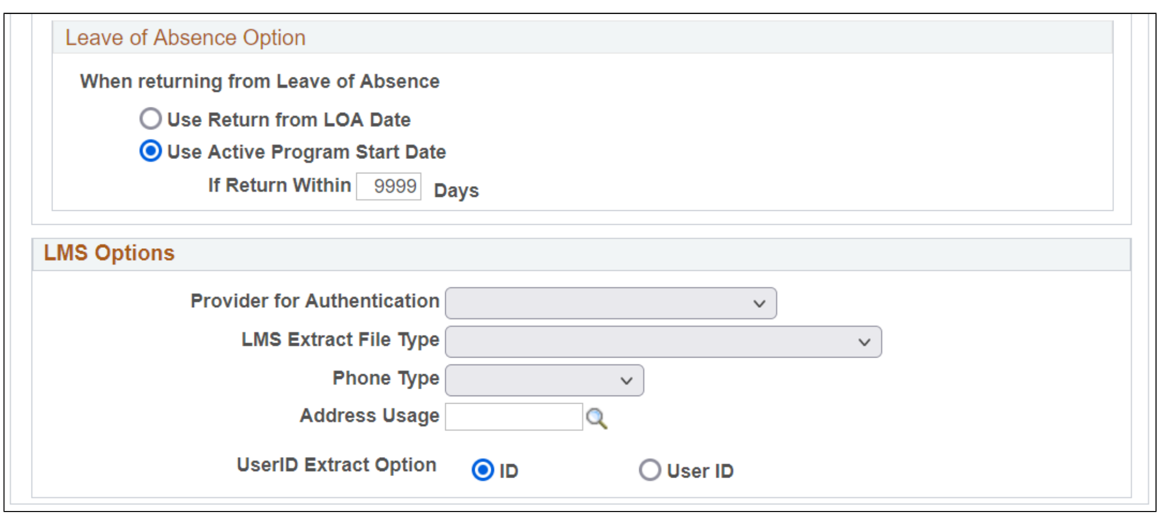
Setting Additional Institution Defaults and Options

Access the Academic Institution 3 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 3**).

This example illustrates the fields and controls on the Academic Institution 3 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 Academic Institution 3 page 2 of 2. You can find definitions for the fields and controls later on this page.



Attendance and Cohort Defaults

Field or Control	***Description***
Class Meeting Attendance Type	Enter the default attendance type that this academic institution uses for generating attendance rosters. The attendance type indicates the type of attendance roster, such as *Class Meeting, Conference, Field Trip, Instructor Consultation,* or *Study Group.* When you generate attendance rosters, the system uses this default attendance type, along with the fields that you have selected for this attendance type, to create the requested attendance rosters. After you generate the attendance rosters, you can change the attendance type for individual class meetings. When you define the possible attendance rosters and applicable fields for each course component (through the Components page of the Course Catalog component), define all possible scenarios. Defining all possible scenarios ensures proper attendance roster generation if you decide at a later date to modify the class meeting attendance type for this academic institution. This field is required for attendance roster batch generation.
Student Attribute for Cohort	Enter a default student attribute for cohort. Student attributes (such as cohort) are attached to a student's program record on the Student Attributes page in the Student Program/Plan component. If a student has an attribute on the Student Attributes page equal to the one set here, the Consolidate Academic Statistics COBOL SQL process (SRPCCONP) writes this common student attribute to the student's consolidated academic statistics record, which you can then prompt against for reporting purposes. The Consolidate Academic Statistics process searches for only the student attribute that you specify here. If the process does not find this student attribute on the student's program record, then the process does not include a student attribute for cohort on the student's consolidated statistics record. If the process finds multiple occurrences of this student attribute on the student's program record, then it writes the one with the lowest primacy number to the student's consolidated statistics record.

Academic Shift Options

Use this group box to define whether Academic Shift functionality is used across the institution.

Field or Control	*Description*
Use Shift	If you select this check box, the Academic Shift field appears on various pages in Admissions and Student Records, such as the Application Program Data page and Student Program page. The values available in the field are those that have been defined on the Academic Shift page.
Use Shift by Admit Term	If you also select this check box, the values available in the Academic Shift field are those that have been defined on the Academic Shift page and then mapped to an admit term on the Academic Shift Mapping page.

See Defining Academic Shifts

See “Mapping Academic Shifts to Admit Terms” (Recruiting and Admissions)

See “Adding New Applications Manually” (Recruiting and Admissions)

See “Maintaining Student Academic Programs” (Student Records)

NSC Options

Use the **NSC Options** group box to define how the NSC Extract SQR process (SRNSLCEX) calculates a student's anticipated graduation date (AGD) and to define the default Federal Interagency Committee on Education (FICE) code that is in the NSC extract for this academic institution.

Field or Control	*Description*
AGD Rule (anticipated graduation date rule)	Indicate how you want the NSC Extract process to determine a student's AGD. By reporting a student's AGD to the NSC, the NSC can provide this critical information to lending institutions so that they know when to begin collecting loans from students. Any modification to these translate values requires a substantial programming effort. Values are: *Use Expected Grad Term:* Select to have the NSC Extract process use the end date of the term that a student is expected to graduate as the basis for a student's AGD. Define a student's expected graduation term on the Student Program page. *Use Term End Date:* Select to have the NSC Extract process use the end date of the term that the institution is reporting to the NSC as the basis for a student's AGD.

Field or Control	***Description***
Month Factor	Enter the number of months that you want the NSC Extract process to add to the date determined by the AGD rule when the process calculates a student's AGD. For example, use the term end date plus a month factor of 12 to report to the NSC that a student's anticipated graduation date is a year beyond the end date of the term that the institution reports to the NSC.
FICE Code (Federal Interagency Committee on Education code)	Enter the default FICE code that you want to appear in the NSC extract for this academic institution. This value appears on the NSC page, where you can override it for each branch code of an academic institution.
Enrollment Status Date Option	These options control how the process determines the enrollment status effective date. Selecting: • **Use Term Begin Date or Academic Load Change Date (Legacy)** indicates that there's no change in the way the process determines enrollment status date • **Use the Date the Enrollment Status was Determined** activates the processing and logic that evaluates a student's Consolidated Statistics history to determine a true program enrollment status effective date. The process cycles through the history to determine the earliest instance of a student's current (for the statistics period being processed) enrollment status.
Terms with Missing Enrollment Status Data	The values you define here serve as a list of term categories where the process should ignore any Student Consolidated Statistics period data (STDNT_CONS_STAT/ SSR_STD_CON_ST2) that doesn't have a term enrollment status when recalculating a student's program enrollment status date. • **Term Category of Data** returns a list of active term category codes. • **Skip Historical Data** is always selected and is display-only.

Field or Control	*Description*
Student with Multiple Plans on same CIP Code Keys	By default, the **Consolidate by NSC Five-Point Match Criteria** check box isn't selected. When not selected, there is no change in the way CIP codes/NSC attributes are handled. Each NSC eligible active plan is reported regardless of match on the criteria listed. But potential duplicates will be identified. When this check box is selected, the Consolidated Statistics process will use NSC five-point matching criteria when evaluating student plan data to consolidate plans. If the process finds two or more active plans where all of these items match, then those plans will be reported as a single program under one CIP code, using the earliest program start date/enrollment status effective date: • Plan CIP code • Plan Credential level • Program Published Length • Program Published Length Measurement • Program Weeks in Title IV Academic Year
Leave of Absence Option	These options control how the process reports program start date for when a student returns from a leave of absence, that is, where program stack has been placed in leave of absence status and subsequently reactivated using a "return from leave of absence" program action. Selecting: • **Use Return from LOA Date** indicates that there's no change to the current processing: a student’s return date will be used as the program start date. • **Use Active Program Start Date** tells the process to use the start date from the student’s current active program start date.

LMS Options

Use the **LMS Options** group box to specify LMS file type default values and personal data extract parameters.

Field or Control	***Description***
Provider for Authentication	If all or most of the classes are LMS classes requiring self-service user authentication, select a provider for authentication. The provider serves as a high-level default. When this field is blank on the Components page of the Course Catalog component, the value entered on the Institution page is provided by default from the schedule of classes if a class is scheduled. Providers are defined on the LMS Provider Setup page.
LMS Extract File Type (learning management systems extract file type)	Select an LMS file type of *Blackboard CourseInfo 4, WebCT API Input Format,* or *XML V1.01* that serves as a high-level default when all or most of the classes are LMS classes. When the field is blank on the Components page of the Course Catalog component, the value selected here appears on the schedule of classes if a class is scheduled. Any modification to these translate values requires a substantial programming effort.
Phone Type and **Address Usage**	Select a phone type and address usage to specify demographic information for the Person object. If you select the **People** option on the LMS Extract Output page, the values selected here determine which phone and address information is exported. Because phone numbers and addresses are stored as separate records in Campus Community, you may actually choose to retrieve an individual's work phone number and home address. Remember that if the phone type that you specify is not found for the individual, no phone number is extracted. This functionality is different from that of an address, where you can specify an address usage or preferred selection order that causes the first one found to be extracted. With a phone type, you can select only one choice; therefore, make it a target that is likely to be found for every person object in the extract process. You should select a voice line because the system automatically extracts fax lines in addition to whatever you select here.
UserID Extract Option	Identify whether the LMS extract should use the student or instructor's *EmplID* or *UserID.*

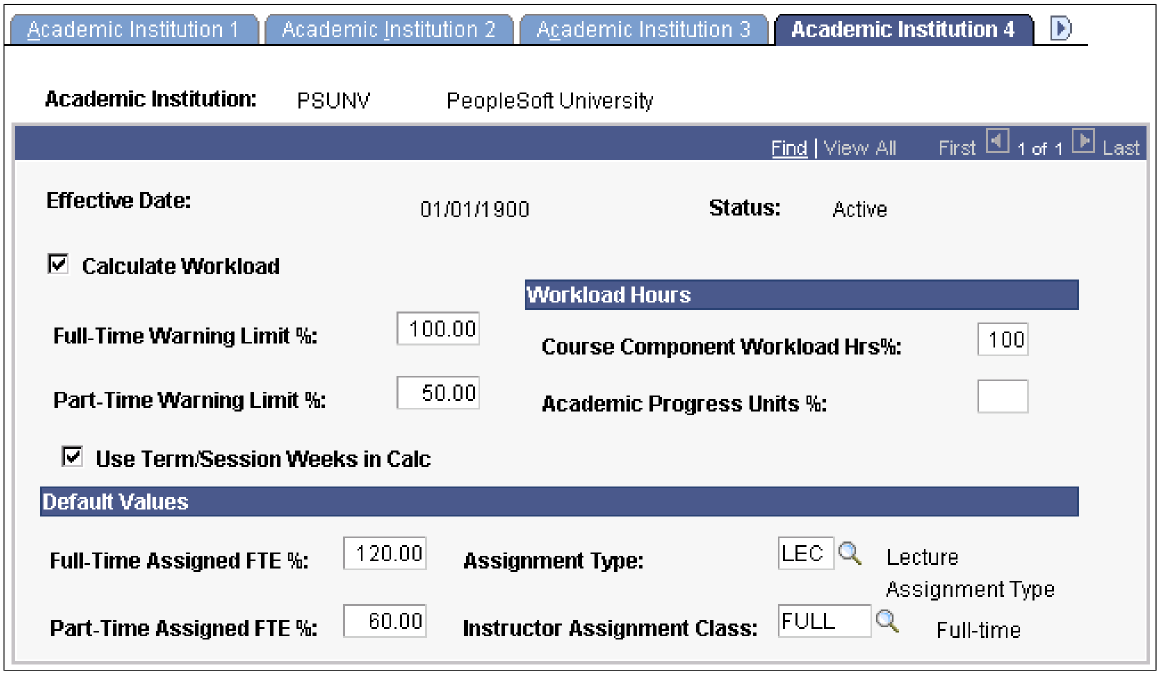
Related Links

“Understanding Attendance Tracking” (Student Records)
“Understanding Consolidating and Reporting Academic Statistics” (Student Records)
“Understanding Consolidated Statistics Processes” (Student Records)
“Understanding Biographical Information” (Campus Community Fundamentals)

Activating Instructor Workload

Access the Academic Institution 4 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 4**).

This example illustrates the fields and controls on the Academic Institution 4 page. You can find definitions for the fields and controls later on this page.



Related Links

“Understanding Instructor Workload” (Student Records)

Setting Repeat Checking Controls

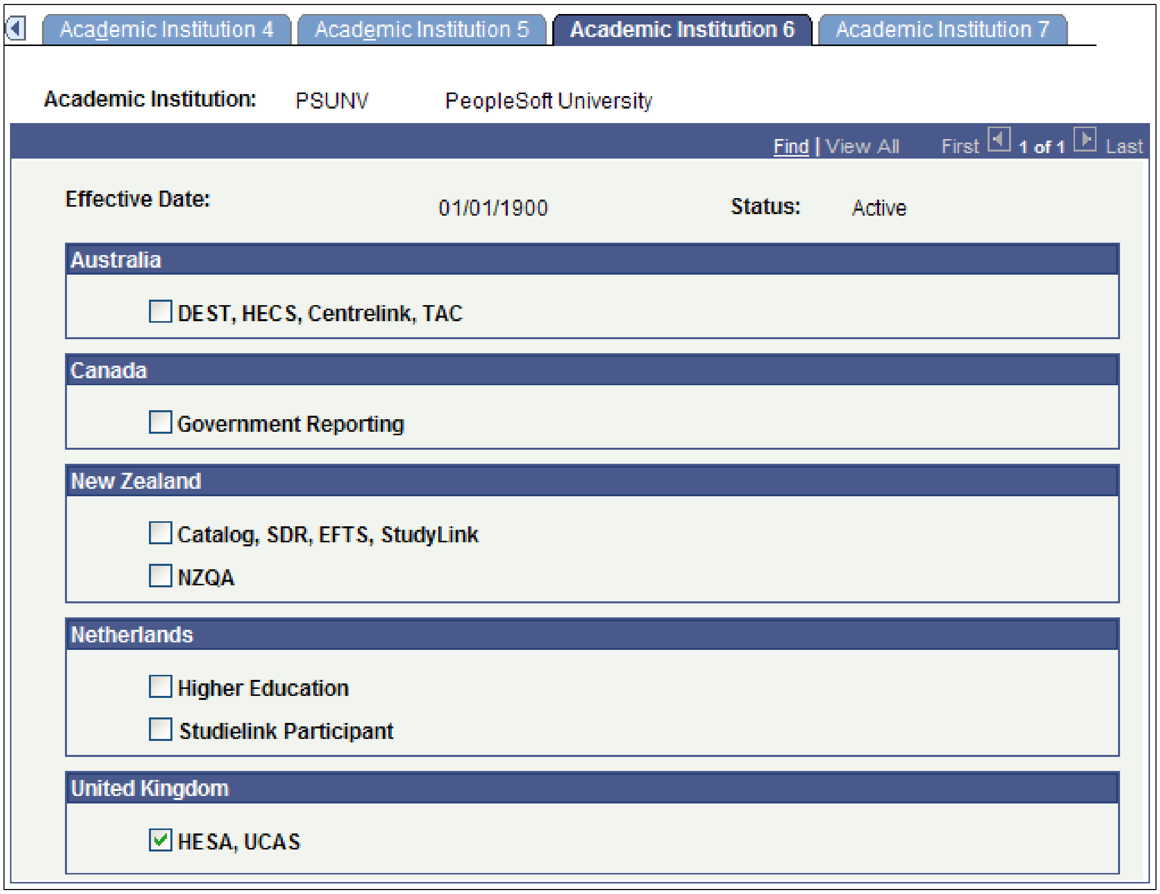
For information about the Academic Institution 5 page **(Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 5).**

See “Setting Up Repeat Checking for Academic Institutions” (Student Records)

(AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features

Access the Academic Institution 6 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 6**).

This example illustrates the fields and controls on the Academic Institution 6 page. You can find definitions for the fields and controls later on this page.



Important! To use country-specific functionality in the system, you must also activate the country's features on the Installation Student Administration setup page for setID-based functionality.

Field or Control	***Description***
Australia	Select to enable Australian DEST, HECS, Centrelink, and TAC functionality. (Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) was previously known as DEEWR and before that, as DEST.)
Canada	Select to enable Canadian government reporting.
New Zealand	Select to enable New Zealand Catalog, SDR, EFTS, StudyLink, and NZQA functionality.
Netherlands	Select to enable Netherlands Higher Education functionality.
Studielink Participant	Select to activate all online Studielink behavior.

Field or Control	*Description*
United Kingdom	Select to enable the United Kingdom specific fields in the system for an academic institution.

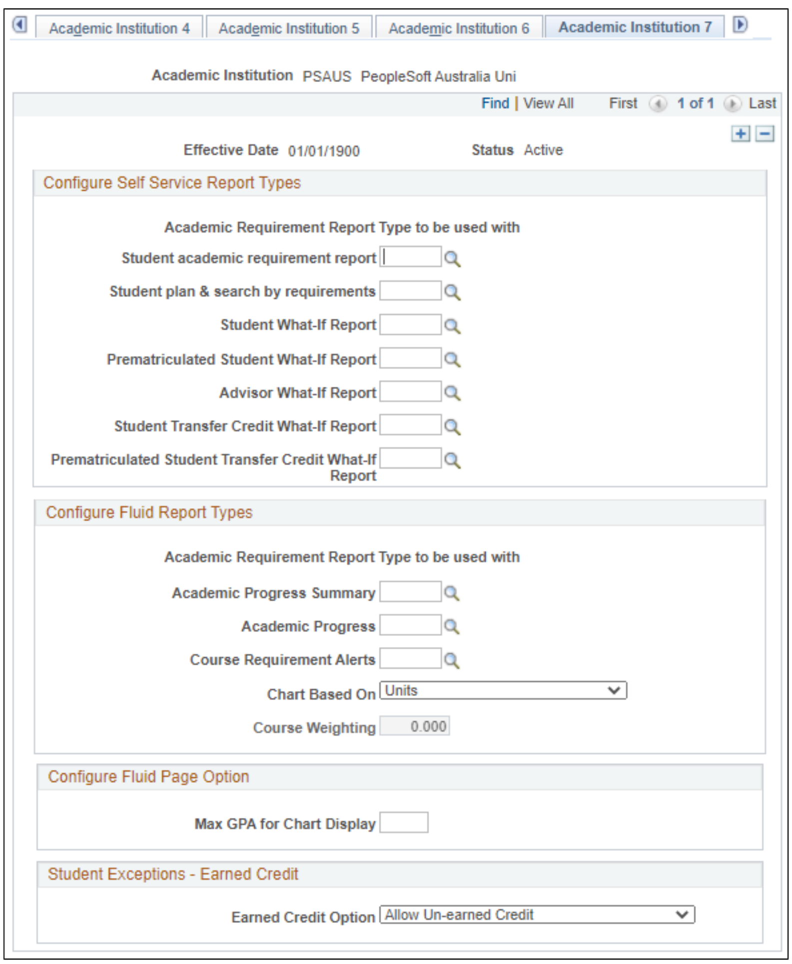
Related Links

"Understanding the Canadian Government Reporting Process" (Student Records)
"Tracking Student Higher Education Information" (Student Records)
Understanding Australian Government Reporting
"Understanding New Zealand Government Reporting" (Student Records)
Selecting Country-Specific Features and Enabling CRM for Higher Education Feature

Identifying Self-Service Report Types

Access the Academic Institution 7 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 7**).

This example illustrates the fields and controls on the Academic Institution 7 page. You can find definitions for the fields and controls later on this page.



Configure Self Service Report Types

Field or Control	***Description***
Student academic requirement report	Enter the type of report to be used in the My Academic Requirements feature. This field prompts on advisement report types that do not have the **Include What-If Information** or **Include Planned Courses** check boxes selected.
Student plan & search by requirements	Enter the type of report to be used on the My Planner and Search by My Requirements features. This field prompts on advisement report types that have the **Include Planned Courses** check box selected.
Student What-If Report	Enter the type of report to be used on the What-If Report. This field prompts on any advisement report type that has the **Include What-If Information** check box selected.
Prematriculated Student What-If Report	If you want to enable prematriculated students, such as prospects and applicants, to run a what-if advisement report using the What-If Report – Create What-if Scenario (SAA_SS_WHATIF) page, enter the advisement report type to be used. This field prompts on any advisement report type that has the Include What-If Information check box selected.
Advisor What-If Report	If you want to enable academic advisors or administrators to generate what-if advisement reports for prospective or active students using the What-If Report – Create What-if Scenario self-service page, enter the advisement report type to be used. This field prompts on any advisement report type that has the Include What-If Information check box selected.
Student Transfer Credit What-if Report	If you want to enable active students to generate what-if advisement reports from the Evaluate My Transfer Credit – Generate a What-If Advisement Report (SS_TRCR_AA_RQST) page, enter the advisement report type to be used. This field prompts on any advisement report type that has the Include What-If Information check box, the Include Completed Transfer Models check box, and the Include Self-Reported Transfer Models check box selected. Because the report type entered here is specifically for use with the Evaluate My Transfer Credit component, you must select the Include Completed Transfer Models and Include Self-Reported Transfer Models check boxes in addition to the Include What-If Information check box.

Field or Control	***Description***
Prematriculated Student Transfer Credit What-If Report	If you want to enable prematriculated students to generate what-if advisement reports from the Evaluate My Transfer Credit – Generate a What-If Advisement Report self-service page, enter the advisement report type to be used. This field prompts on any advisement report type that has the Include What-If Information check box, the Include Completed Transfer Models check box, and the Include Self-Reported Transfer Models check box selected. Because the report type entered here is specifically for use with the Evaluate My Transfer Credit component, you must select the Include Completed Transfer Models and Include Self-Reported Transfer Models check boxes in addition to the Include What-If Information check box.

Configure Fluid Report Types

Field or Control	***Description***
Academic Progress Summary	Enter the type of report to be used in the **Academic Progress Summary** feature. This report should contain unit based requirements that will populate the pie chart in the **Academic Progress** tile and **Academic Progress Summary** page.
Academic Progress	Enter the type of report to be used in the **Academic Progress** feature. This can be the Institution's standard advising report or a simplified report created to be used with the **Academic Progress** page.
Course Requirement Alerts	Enter the type of report to be used in the **Course Requirement Alerts** feature. This report should contain requirements that make up the bulk of the students courses. Courses that students are enrolled in, do not meet any course requirements and are within the drop period will be displayed in the **Course Requirement Alerts** page.
Chart Based On	Select the type of requirement based on which, the Academic Progress Summary chart is generated. Options are *Units, Courses,* and *Units and Courses*.

Field or Control	*Description*
Course Weighting	You can update this field only if *Units and Courses* is selected as the basis for creating the Academic Progress Summary. Enter a numeric value *(NNN.NNN)* to indicate the weighting to be assigned to a course. Use this field to give the course requirements the same weighting as unit requirements. For example, if the majority of your institution's courses are each worth 3.00 units, the course weighting should be 3.00. Therefore, if the Course Weighting is set to 3.00; and a student has 30 Unit requirements with 18 complete and 6 in progress, and 10 Course requirements with 4 complete and 1 in progress, the courses are multiplied by the weighting value and then added to the units. This student's Academic Progress summary would appear as follows: Total requirements= 30 units + (10 courses * 3.00 weighting) = 60 Completed requirements= 18 units + (4 courses * 3.00) = 30 Requirements in-progress= 6 units + (1 course * 3.00) = 9 Incomplete requirements= 6 units + (5 courses * 3.00) =21 The Academic Progress Summary chart would indicate 50% Complete, 15% In Progress and 35% Incomplete.

Configure Fluid Page Option

Field or Control	*Description*
Max GPA for Chart Display(maximum grade point average for chart display)	Enter the maximum grade point average to be used in the GPA charts appearing on the **Academic Progress** page (for example, 4.0).

Configure Student Exceptions - Earned Credit

Field or Control	***Description***
Earned Credit Option	Select: • **Allow Unearned Credit** to use earned and unearned credit. Selecting this disables the Earned Credit Only check box on the Authorize Student Exceptions page. • **Enable Earned Credit Checkbox** to enable the check box on the Authorize Student Exceptions page (when you create an exception). This lets you choose whether to include or exclude unearned credit for each student exception. • **Use Earned Credit Only** to use only earned credits. Selecting this disables the Earned Credit Only check box on the Authorize Student Exceptions page. See “Creating Advisement Overrides” (Academic Advisement)

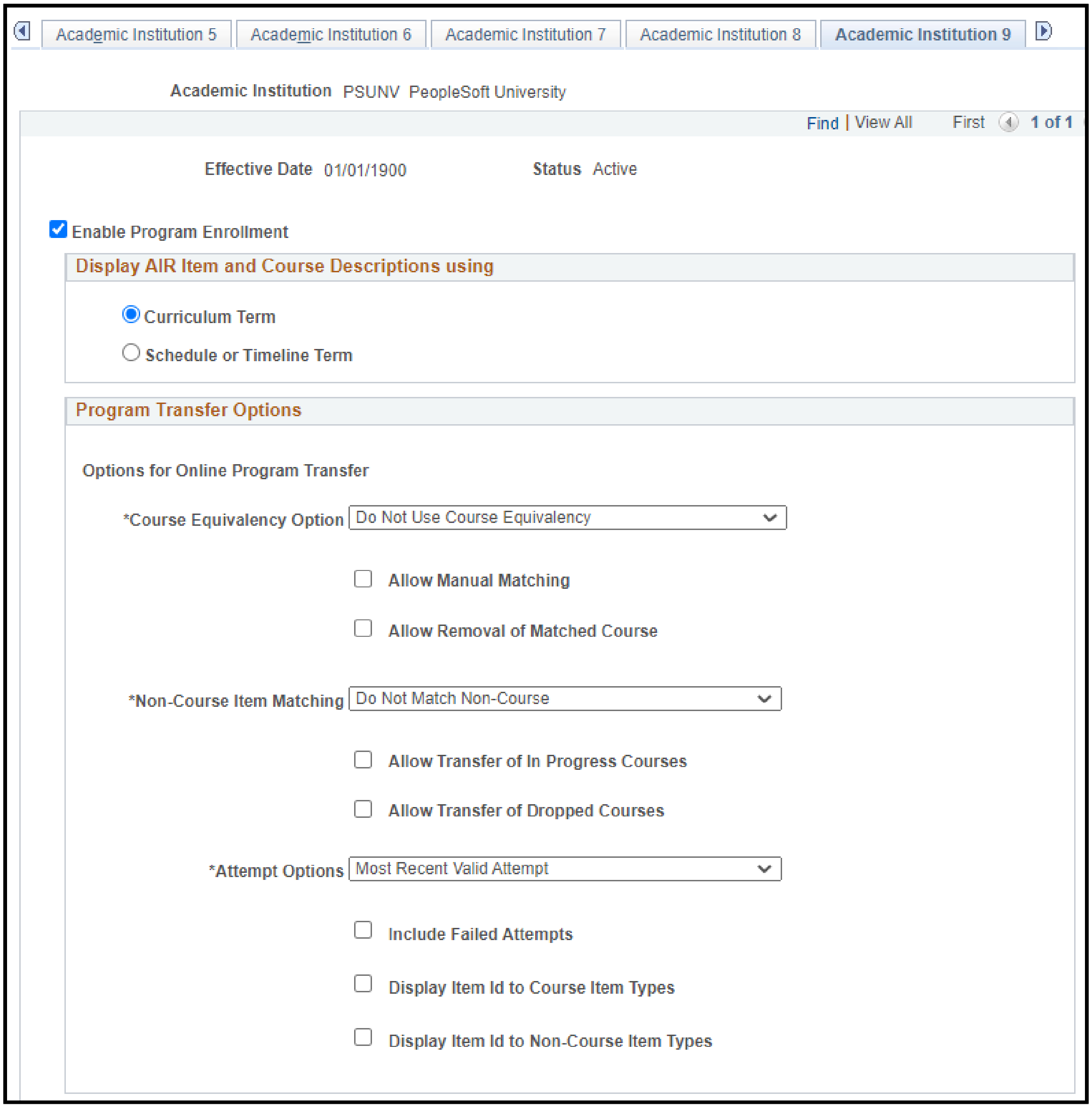
Related Links

“Setting Up Advisement Report Types” (Academic Advisement)

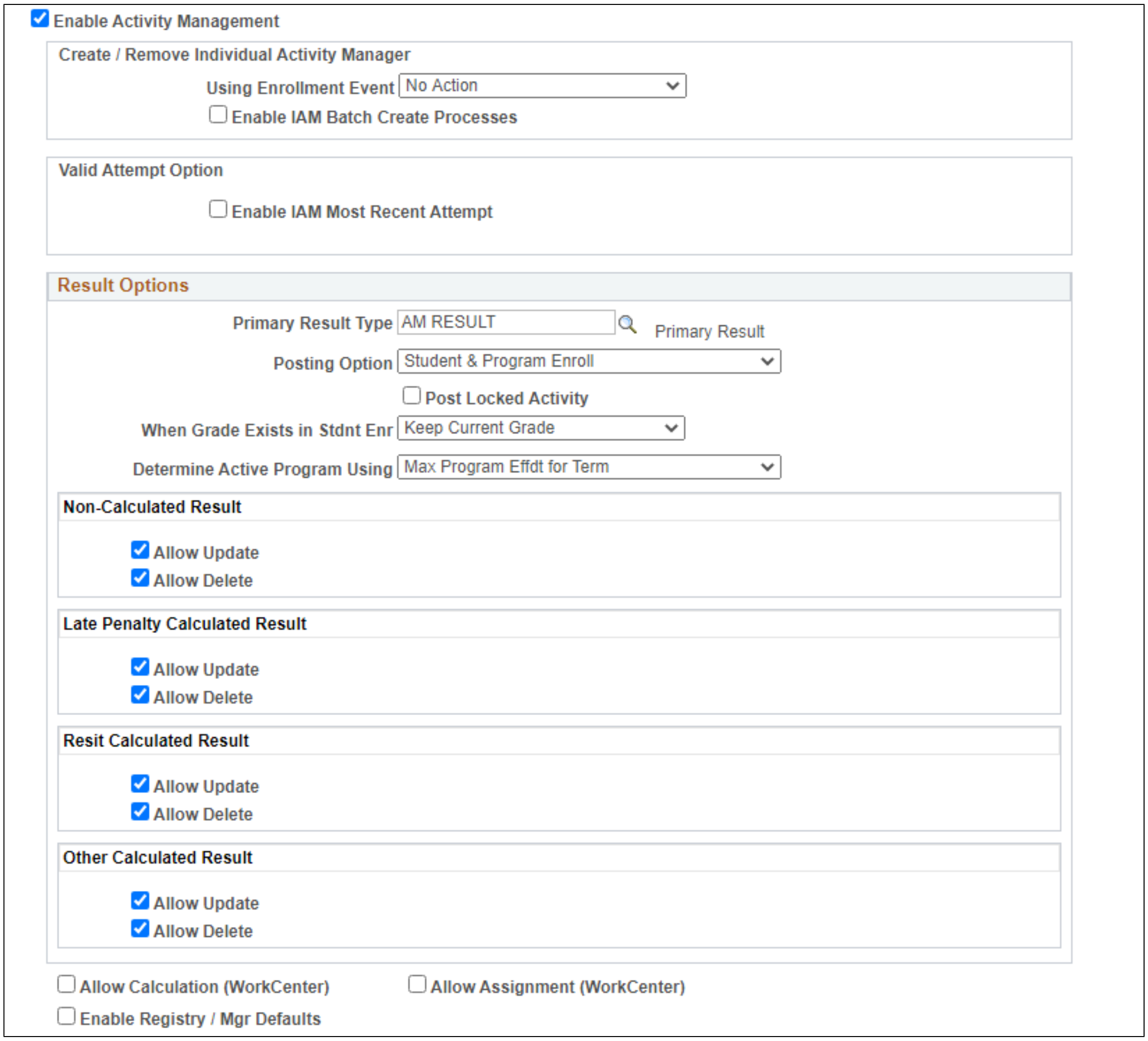
Enabling Program Enrollment and Activity Management Defaults

Access the Academic Institution 9 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 9**).

This example illustrates the fields and controls on the Academic Institution 9 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 Academic Institution 9 page 2 of 2. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Enable Program Enrollment	Select this check box to enable the use of Program Enrollment fields on the Admissions Application and Student Program/ Plan components, and also enable AIR mapping. See "Adding New Applications Manually" (Recruiting and Admissions) See "Maintaining Student Program Stacks" (Student Records) See "Linking an APT Instance to the Student Program" (Student Records)

Display AIR Item and Course Description Options

You can choose which term you want to use to display Academic Item Registry (AIR) Items and Course Descriptions.

Field or Control	***Description***
Curriculum Term	Select this option if you want the Academic Progress Tracker (APT) Admin page and all Program Enrollment Self Service pages to use descriptions from AIR Item or course based on the Curriculum term.
Schedule or Timeline Term	Select this option if you want the Academic Progress Tracker (APT) Admin page and all Program Enrollment Self Service pages to use descriptions from AIR Item or course based on timeline or scheduled term.

Program Transfer Options

Use this region to identify how courses and academic items are matched when transferring student programs.

The settings here determine how APT program transfers are facilitated. See “Managing APT Program Transfer” (Student Records).

Field or Control	***Description***
Course Equivalency Option	If you select: • *Use Course Equivalency*, the system uses the course equivalency setup to find courses. See “Creating Course Equivalency Groups” (Student Records). • *Use Item Mapping*, the system uses the course mapping you set up on the Program Transfer Course Map page to find an equivalent course. See “Managing APT Program Transfer” (Student Records).
Allow Manual Matching	Select if you want to manually match an equivalent course. This is used together with Course Equivalency Option.
Allow Removal of Matched Course	Select if you want to remove a matching course that exists in the source APT and destination APT. This is used together with Course Equivalency Option.

Field or Control	*Description*
Non-Course Item Matching	If you select: • *Match Any Item Type*, any non-course item from the source APT is mapped to any non-course item in the destination APT. • *Match Same Item Type Only*, only the same item types are mapped to the non-course items in the destination APT.
Allow Transfer of In Progress Courses	Select to allow the transfer of in-progress courses to the destination APT.
Allow Transfer of Dropped Courses	Select to allow the transfer of dropped courses to the destination APT.
Attempt Options	Select a value to specify which academic item attempts to transfer to the destination APT. An academic item attempt is considered valid if **Include in Calculation** is selected on the APT Items page, Academic Item Attempt region. • *All Attempts* transfers all attempts of the academic items, whether valid or not. • *Most Recent Attempt* transfers only the most-recent attempt of an academic item. • *Most Recent Valid Attempt* transfers only the most-recent valid attempt. • *Valid Attempts Only* selects only valid attempts to transfer.
Include Failed Attempts	This option is used together with **Attempt Options**. Select to transfer failed attempts to the destination APT.
Display Item ID to Course Item Types	Select to add the course item's ID to the Transfer Action description on the APT Transfer page.
Display Item ID to Non-Course Item Types	Select to add the non-course item's ID to the Transfer Action description on the APT Transfer page.

Activity Management

Field or Control	***Description***
Enable Activity Management	Select this check box to turn on the features used by Activity Management. When you select this check box, the Create / Remove Individual Activity Manager and Result Options sections appear. See "Setting Up Activity Management Throughout Campus Solutions" (Student Records)

Create/Update Individual Activity Manager

This group box determines how schools will create Individual Activity Managers (IAMs) for students. Two options are available that can either work independently or together based on the needs of the institution. Select the **Use Enrollment Event** option to create and edit IAMs at the point of the enrollment transaction. Another option is to create IAMs in batch at a later point in the enrollment period.

Field or Control	***Description***
Using Enrollment Event	Institutions can use this setting to control how to create and edit student IAMs based on a student's enrollment. Options include *Create and Remove, Remove Only,* and *No Action.* Select *Create and Remove* when IAMs will be generated on initial enrollment and updated when a student drops or swaps. Select *Remove Only* when the initial generation will be done in batch (which requires enabling the batch process) and any subsequent drops and swaps will be automatically updated. Select **No Action** to create and edit no IAMs automatically from a student's enrollment; drops and swaps will not be updated.

Field or Control	*Description*
Enable IAM Batch Create Processes	Select this check box to enable the run controls for the IAM Gen Using Student Enroll and IAM Gen Using APT (EOC) batch processes. Institutions should enable the batch processes if they want to generate IAMs for a group of students either from class enrollment or for an exam-only course (EOC). Use the following scenarios to determine the IAM settings: • Schools wanting to create IAMs strictly from enrollment but also have EOCs should set the **Enrollment Event** field to *Create and Remove* and set the batch processes to *Yes*. • Schools wanting to create IAMs strictly from enrollment and do not have EOCs should set the **Enrollment Event** field to *Create and Remove* and set the batch processes to *No*. • Schools not wanting to create IAMs based on initial enrollment but wishing to create them at a point in the future (once enrollment has settled) should set the batch processes to *Yes* and set the **Enrollment Event** field to *Remove Only* to capture drop transactions that occur after the batch process has been run. (Schools can also change the setting for the enrollment event to *Create and Remove* after the batch process to pick up all new adds and drops).

Activity Result Defaults

Field or Control	*Description*
Primary Result Type	Indicate the result type that will be used to capture the overall course result. Each assessed activity of a course will have a result for this result type, either manually input or calculated. This result type will populate automatically for each activity of a course on the result roster. A primary result type is required for Activity Management.

Field or Control	***Description***
Posting Option	Indicate to which record(s) you want to post the AM primary result. After the course result is entered or calculated in Activity Management you will use the IAM Result Posting process to post the result to the student's Academic Progress Tracker and student enrollment record. This setting defaults to the IAM Result Posting process. The options include: • *Student and Program Enroll* – results will be posted to both the student's enrollment record and the student's academic progress tracker. For student enroll, the course grade will be posted to the student's graded component. For program enrollment, the results defined on the result scale for the primary result type will be posted to the student's Academic Progress Tracker. • *Program Enroll* – results defined on the result scale for the primary result type will be posted to the student's Academic Progress Tracker. • *Student Enroll* – for student enroll, the course grade will be posted to the student's graded component. • *Do Not Post* When you select *Student and Program Enroll* or *Program Enroll*, you can set how to determine the effective date of the active program using the **Determine Active Program Using** field.
Post Locked Activity	If this checkbox is selected, Locked (IAM Locked and Course locked) activity results are posted through IAM Batch result posting.
When Grade Exists in Stdnt Enr	When posting to the student's enrollment record you must indicate what should occur if a grade already exists on STDNT_ENRL. The options include: • *Keep Current Grade* – the grade from the student's IAM will not be posted. • *Apply Grade Change* – the grade from the student's IAM will override the grade that exists on STDNT_ENRL.
Determine Active Program Using	Depending on the posting option you select, you can set how to determine the effective date of the active program by selecting *Current System Date* or *Maximum Program Effective Date for Term* (Max Program Effdt for Term).

Field or Control	***Description***
Allow Calculation (WorkCenter)	Select this check box to enable IAM calculations in the Activity Management WorkCenter that allow faculty and exam staff to invoke the calculation process for the primary result type.
Allow Assignment (WorkCenter)	Select this check box to allow faculty and exam staff to assign activities to students from the Activity Roster.
Enable Registry/Mgr Defaults	Select this check box to enable defaults that can be entered for all values within the Registry and Activity/Section Managers. When you select this check box, the Activity Management Defaults section appears.

Activity Management Defaults

Field or Control	***Description***
Enable Career Defaults	Indicate if the defaults are applicable at the academic career level. If selected the values defined here can be overridden on the academic career table. When selected the Activity Management Default page is enabled in the Academic Career Table component.
Enable Academic Org Defaults	Indicate if the defaults are applicable at the academic organization level. If selected the values defined here can be overridden on the academic organization table. When selected the Activity Management Default page is enabled in the Academic Organization Table component.

For information on setting up anonymous grading, see “Setting Up Anonymous Grading” (Student Records).

Content Options

Field or Control	***Description***
Result Scale	Define the result scale to default to the Activity Registry.
Passing Mark/Grade	Define the minimum mark and/or grade to default to the Activity Registry.

Field or Control	*Description*
Service Impact	Define the service impact to default to the Activity Registry.

Attendance Tracking Options

Field or Control	*Description*
Track Using	Indicate the attendance requirement to default to the Activity Registry.
Required Attendance/Allowed Absences	Indicate the attendance requirement to default to the Activity Registry.

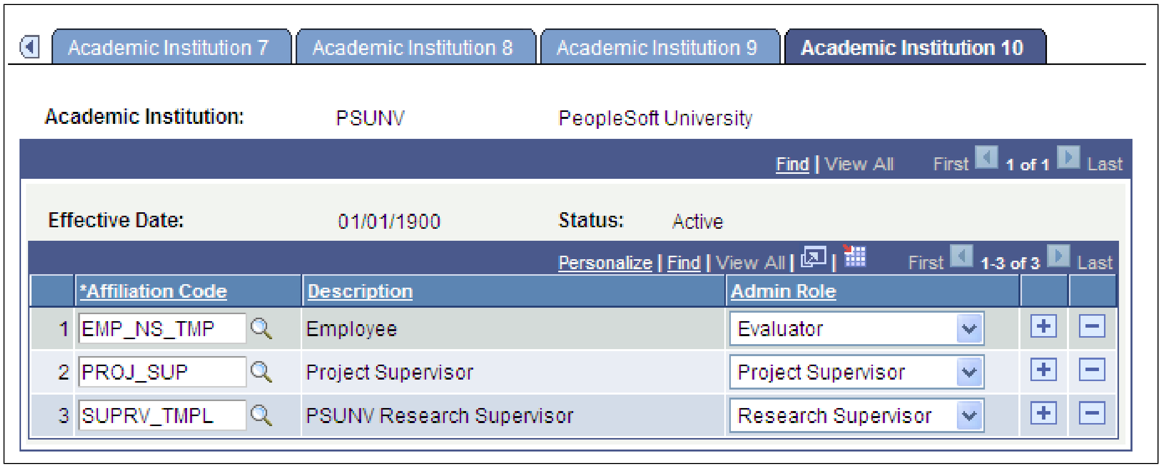
Forms of Identification

Field or Control	*Description*
Form of Identification	Define the forms of identification(s) to default to the Activity Registry.
Required	Select to indicate the form of identification is required and is defaulted to the Activity Registry.

Mapping Affiliation Codes to Administrator Roles

Access the Academic Institution 10 page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Institution Table** > **Academic Institution 10**).

This example illustrates the fields and controls on the Academic Institution 10 page. You can find definitions for the fields and controls later on this page.



Use the Academic Institution 10 page when you define administrators for Research Tracking, Academic Project Management, and Evaluation Management features.

After you set up your Affiliation codes, map the root affiliations to Research Supervisor, Project Supervisor, and Evaluator roles on this page.

Research Supervisor role is for research administrators. Project Supervisor role is for administrators of student academic projects. Evaluator role is for evaluation committee members.

See "Understanding Affiliations Setup" (Campus Community Fundamentals)

Field or Control	*Description*
Affiliation Code	Select a code from those that you defined on the Definition page in the Affiliation Setup component. The available affiliation codes are those which are effective (based on the institution's effective date) and for which the Root Indicator check box is selected in Affiliations setup. The child affiliations of the root affiliation or the root affiliations if no children exist are then available in the Administrator Type field on the Administrator Profile Management page.

Related Links

"Defining Administrators" (Student Records)

"Defining and Managing Administrator Profiles" (Student Records)

"Defining Administrators" (Student Records)

"Setting Up Committee Types and Roles" (Campus Community Fundamentals)

Setting Up Campuses

To set up campuses, use the Campus Table component (CAMPUS_TABLE).

A campus is an entity, usually associated with a separate physical administrative unit, that belongs to a single academic institution, uses the same course catalog, and produces a common transcript for students within the same academic career. The PeopleSoft Campus Solution system enables you to define as many campuses within an academic institution as necessary to meet your business needs.

This section lists prerequisites and discusses how to define campuses.

Prerequisites

Before you set up campuses, use the Location Table component to define general campus locations within Campus Solutions.

These campus locations are synonymous with central locations or addresses for the various campuses that comprise a college or university. If you have one main campus, you probably have a single location. However, if you offer classes at satellite locations or if you have geographically separate entities that make up the institution, you must define multiple locations.

See: Setting Up Locations

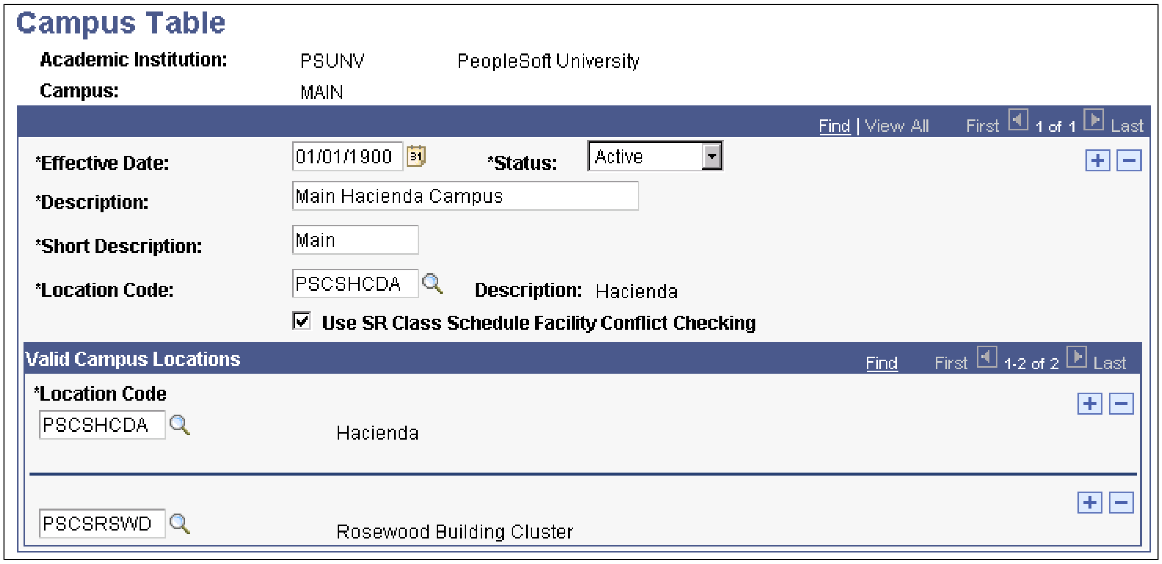
Page Used to Set Up Campuses

Page Name	***Definition Name***	***Navigation***	***Usage***
Campus Table	CAMPUS_TABLE	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Campus Table**	Define each campus that constitutes an academic institution and indicate which locations are valid for a particular campus.

Defining Campuses

Access the Campus Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Campus Table**).

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



Field or Control	***Description***
Use SR Class Schedule Facility Conflict Checking	Select to enable the system to use internal facility conflict checking functionality for this campus. The system checks for facility conflicts whenever a facility is booked for a class on the Meetings page or the Exam page of the schedule of classes. The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process. **Note:** This check box has no relation to the **Check for Facility Conflict** check box on the Facility Table page, which controls whether you can schedule multiple events at the same facility.

Valid Campus Locations

Field or Control	***Description***
Location Code (upper)	Enter a location code for the primary location of the campus. Define locations on the Location Table. See: Setting Up Locations
Location Code (lower)	Enter all valid location codes for this campus. When creating courses or scheduling classes at a particular campus, the system displays only the values that you list here.

Related Links

"Defining Facilities and Rooms" (Student Records)

Defining Academic Careers

To set up academic careers, use the Academic Career Table component (ACAD_CAREER_TBL).

This section provides an overview of academic careers and discusses how to:

- Describe academic career parameters.
- Set additional academic career parameters.
- Set up academic career pointers.
- Set repeat checking controls for academic careers.
- Set up self-service options.
- Set up Australia-specific academic careers.
- Establish Activity Management defaults for academic careers.

Understanding Academic Careers

Academic career is a concept used in Campus Solutions to designate all course work undertaken by a student at an academic institution; you group this course work in a single student record. For example, a university that has an undergraduate school, a graduate school, and several professional schools can define an undergraduate career, graduate career, and a separate career for each professional school (for example, law, medical or dental). You might also make extended education or continuing education its own academic career, or make separate academic careers for every school or college at the undergraduate level.

Academic careers have these common characteristics:

- All credit is granted under a common unit type, such as semester hours or quarter hours.
- A single repeat scheme is used.

Use the Academic Career component to create and define academic careers and all the parameters of each academic career. Academic career Values are: delivered with the system as translate values. If, when you are establishing academic careers, you find that you must define more academic career values, add the new values to the translate table for academic careers. The translate table for academic careers is in the ACAD_CAREER field in PeopleSoft Application Designer.

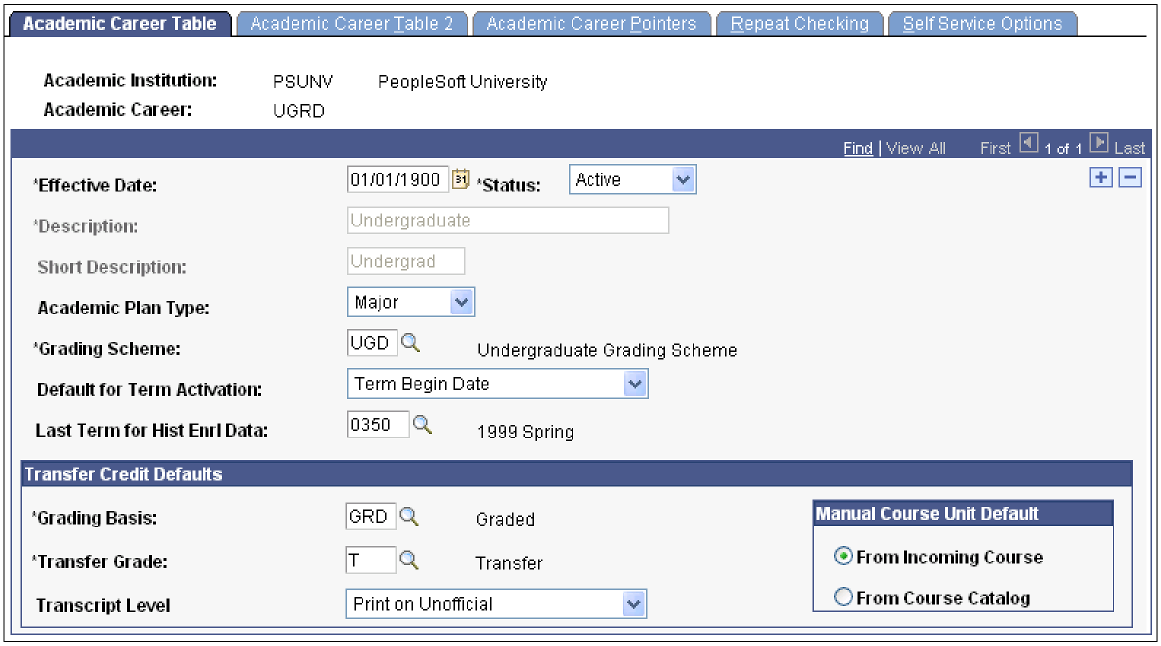
Pages Used to Define Academic Careers

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Career Table	ACAD_CAREER_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Academic Career Table**	Describe academic careers and set parameters, such as grading scheme, for each academic career.
Academic Career Table 2	ACAD_CAREER_TBL2	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Academic Career Table 2**	Set additional academic career parameters, such as default term unit types.
Academic Career Pointers	ACAD_CAR_PTRS	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Academic Career Pointers**	Set up academic career pointers, which specify whether a student within an academic career can enroll in courses from another academic career at a particular academic institution.
Repeat Checking	ACAD_CAR_RPT_CHK	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Repeat Checking**	Set repeat checking controls at the academic career level. Also, link repeat rules to academic careers.
Self Service Options	SSR_ACDCAR_SELFSRV	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Self Service Options**	Indicate if you want users to have the ability to select the students's academic program to be assigned to an enrollment record. Indicate how you want to enforce enrollment appointments for self-service enrollment within this academic career.
Academic Career AUS	SSR_ACAD_CAR_AUS	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Academic Career AUS**	Set up Australian-specific careers.
Activity Management Defaults (academic career)	ACAD_CAR_AM_DFLTS	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Activity Management Defaults**	Set Activity Management default values specific to an academic career.

Describing Academic Career Parameters

Access the Academic Career Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Academic Career Table**).

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



Field or Control	***Description***
Academic Plan Type	Select an academic plan type to indicate the highest level academic plan that is valid within this academic career—for example, *Major, Minor,* or *Concentration.* You can modify these translate values. No programming is associated with this field, but the institution can define restrictions based on this value. For example, if this value is set to *Major* for the undergraduate career, then students in that academic career could take academic plans involving majors, minors, and concentrations. But if this value is set to *Concentration* for the continuing education career, then the institution could create restrictions so that students in that academic career could not declare a major.
Grading Scheme	Enter the grading scheme for this academic career. This grading scheme defines the valid grading bases for this academic career. The system displays this grading scheme by default on the Program 1 page for academic programs within this academic career. You can override the default grading scheme for each academic program. Define grading scheme values on the Grading Scheme Table page.

Field or Control	*Description*
GB Default for Transfer Credit (grading basis default for transfer credit)	Enter the default grading basis for credit transferred to this academic career. This grading basis appears by default on the Program 1 page, where you can override the value for academic programs within this academic career.
Default Grade- Transfer Credit	Enter the default grade for credit transferred to this academic career. This grade appears by default on the Program 1 page, where you can override the value for academic programs within this academic career.
Default for Term Activation	Select either *Term Begin Date* or *Term End Date.* The value you select here determines the default value that appears on the Term Table page. The date specified determines the last date for which a student can be term activated.
Last Term for Hist Enrl Data (last term for historical enrollment data)	Enter the last term for historical enrollment data. The system uses this value in conjunction with the values entered for a student on the Historical Course Enrollment page to determine which historical enrollment information is printed on a student's transcript. This field restricts historical enrollment data to terms less than or equal to the value that you specify. Therefore, set this field value to the latest term possible for historical enrollment records. You can include historical enrollment on transcripts by entering the corresponding option on the Enrollment/Statistics page of the Define Transcript Type component. ***Warning!*** The system populates the **Last Term for Hist Enrl Data** field with *0000.* However, term 0000 does not allow historical enrollment data to appear on a transcript. If you want historical enrollment data to appear on a student's transcript, you must enter another term value.
Transcript Level	The default is *Print on Unofficial.* The transcript level determines which transcript level is defaulted to the following transfer credit pages: Course Credits – Automated, Course Credits – Manual, Test Credits – Automated, Test Credits – Manual, and Other Credit – Manual.

Manual Course Unit Default

Field or Control	***Description***
From Incoming Course	Select this option to populate the **Units Transferred** field in the **Equivalent Course** group box on the Transfer Course Entry page with the value from the **Units Taken** field in the **Incoming Course** group box for the course that has the same group and sequence number.
From Course Catalog	Select this option to populate the **Units Transferred** field in the **Equivalent Course** group box on the Transfer Course Entry page with the value from the **Maximum Units** field in the Course Catalog (CRSE_CATALOG) component.

Regardless of the option that you select in the **Manual Course Unit Default** group box, you can override the default value on the Transfer Course Entry page, to transfer a different number of units.

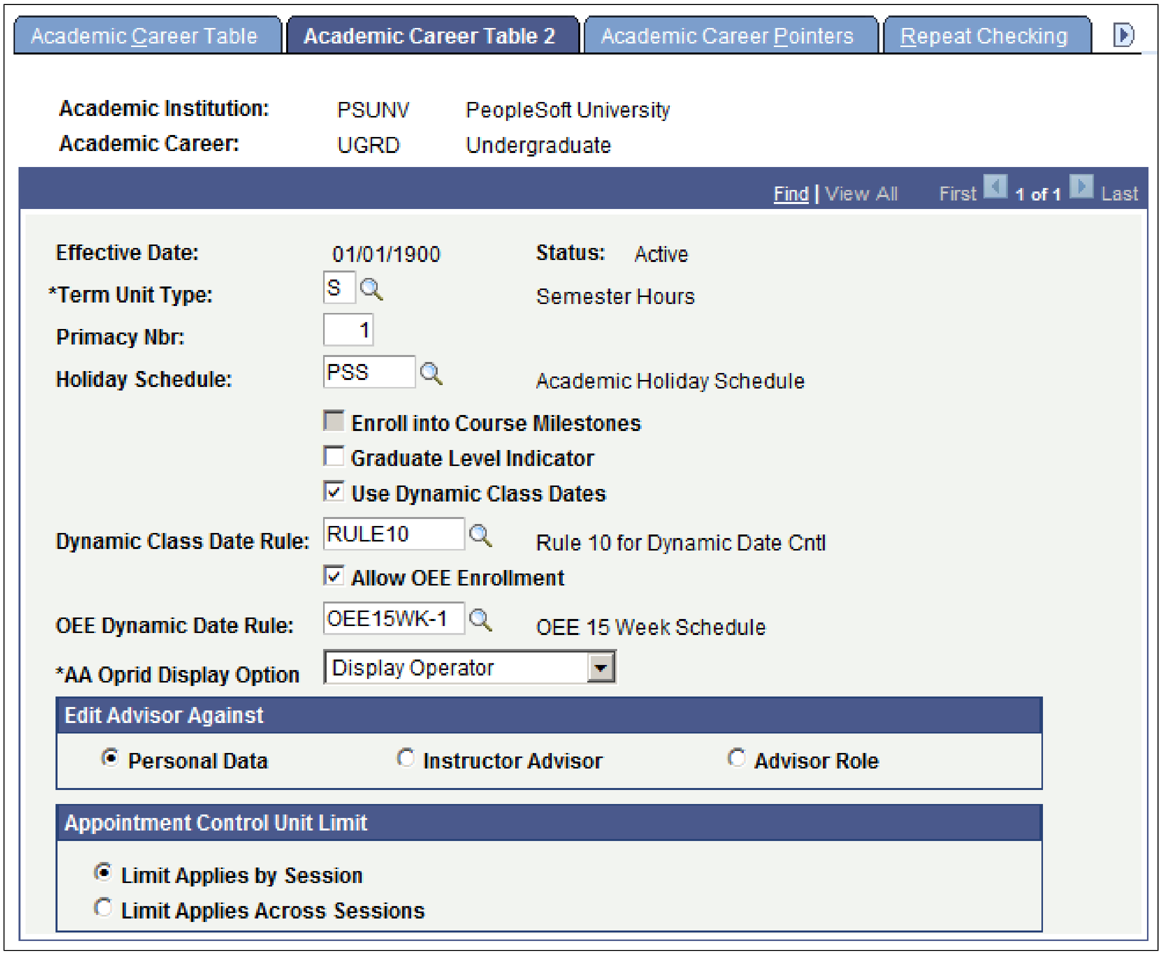
Related Links

Understanding Data Conversion
Understanding Dynamic Academic Calendars
"Creating Historical Enrollment Records" (Student Records)
"Designating Enrollment and Statistics Data" (Student Records)

Setting Additional Academic Career Parameters

Access the Academic Career Table 2 page (**(Set Up SACR > Foundation Tables > Academic Structure > Academic Career Table > Academic Career Table 2**).

This example illustrates the fields and controls on the Academic Career Table 2 page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Term Unit Type	Enter a term unit type to indicate what kind of units are calculated for this academic career. Values for this field are delivered with the system as translate values. These translate values can be modified. **Note:** When processing transfer credit between academic careers with different term unit types, use the Unit Conversion Table page first to set up unit conversion rules.
Primacy Nbr (primacy number)	Enter the primacy number for this academic career. The system uses this number to determine a student's primary academic career when you consolidate academic statistics. The system also uses this number to prioritize financial aid applications when students are enrolled in multiple academic careers at the same time. The lowest number takes precedence. **Note:** Coordinate the numbering with financial aid to avoid conflicts.

Field or Control	***Description***
Holiday Schedule	Enter the holiday schedule for this academic career. The holiday schedule prevents scheduling classes for this academic career on designated holidays. See “Setting Up Holiday Schedules” (Campus Community Fundamentals) **Note:** If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations. See: Integrating Person Data Integrating Setup Data Monitoring Integrations Using the Integrity Utility See *Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions* in My Oracle Support (ID 2091799.2).
Enroll into Course Milestones	Select this check box to enable a course milestone to be created when a student enrolls in a class for which the milestone is selected on the Course/Milestone Link page in the Course Catalog. The **Enroll into Course Milestones** check box must also be selected on the Academic Institution 2 page. See Defining Academic Institutions. See “Creating Course Offerings” (Student Records). (NZL) Select the check box to enable the tracking of NQF (national qualifications framework) Unit Standards for a specific career. See “Understanding New Zealand Government Reporting” (Student Records)
Graduate Level Indicator	Select to indicate that this academic career qualifies as graduate level for reporting purposes. Otherwise, this field is informational only.
Use Dynamic Class Dates	Select to make available the Dynamic Date page of the Academic Program Table component. You use the Dynamic Date page to set up reasons and penalties for canceling, withdrawing from, and dropping classes. These reasons and penalties relate to the corresponding landmark date deadlines on the dynamically calculated academic calendars, and they apply to students according to their academic program.

Field or Control	*Description*
Dynamic Class Date Rule	Enter a dynamic date rule to have the system assign that rule to all course offerings that you tie to this academic career. You can override this default rule on an offering-by-offering basis through the Offerings page. This field prompts you with only the dynamic class date rules that have *not* been designated for open entry/exit (OEE) enrollment on the Dynamic Class Dates page.
Allow OEE Enrollment (allow open entry/exit enrollment)	Select to have all course offerings that you tie to this academic career permit, by default, the scheduling of OEE class sections. You can override this default on an offering-by-offering basis on the Offerings page of the Course Catalog component. If you select this check box, the **OEE Dynamic Date Rule** field becomes available.
OEE Dynamic Date Rule (open entry/exit dynamic date rule)	An OEE dynamic date rule is a *dynamic class date rule* that has been designated for OEE enrollment. The enrollment engine uses the OEE dynamic date rule to calculate significant class dates for a student whenever a student enrolls in an OEE class. This field is available for edit only if you select the **Allow OEE Enrollment** check box on the preceding page of this component. Select an OEE dynamic date rule to have the system assign that rule to all course offerings that you tie to this academic career. You can override this default rule on an offering-by-offering basis through the Offerings page of the Course Catalog component. This field prompts you with only the dynamic class date rules that have been designated for OEE enrollment on the Dynamic Class Dates page.
AA Oprid Display Option (academic advisement operator identification display option)	Select an available option to display or hide the operator ID, operator name, or **Operator** field on the advisement report. The default value is *Display Operator.* *Display Name:* If you select this option, the system displays the operator's name on the advisement report. *Display Operator:* If you select this option, the system displays the operator's ID on the advisement report. *Do Not Display:* If you select this option, the system does not display the **Operator** field on the advisement report.

Edit Advisor Against

Indicate which view the system should use when prompting you to assign an advisor for a student in this academic career. You assign advisors to students on the Student Advisor page. Your selection here appears on the Academic Program page. Select from these options:

Field or Control	*Description*
Personal Data	Prompts against all people with a PERSONAL_DATA record in the PeopleSoft system.
Instructor Advisor	Prompts against all people defined as instructors and advisors on the Instructor/Advisor Table page, as defined for this academic career.
Advisor Role	Prompts against all people defined as advisors on the Instructor/Advisor Table page, as defined for this academic career.

Appointment Control Unit Limit

Indicate how to apply enrollment appointment unit limits when an appointment created for a single session is valid for other sessions within the term. Select from these options:

Field or Control	*Description*
Limit Applies by Session	Enrollment unit limits for enrollment appointments are applied to each individual session for which the appointment is valid. If: • Session A is the appointment control session for Sessions B and C in a term, and • Each session has a limit of 6 units or greater, and • The overall term limit is 18 units or greater, and • A student has an appointment limit restricting enrollment to a total of 6 units, Then: The student can enroll in 6 units in *each* Session (A, B and C).

Field or Control	***Description***
Limit Applies Across Sessions	If: • Session A is the appointment control session for Sessions B and C in a term, and • A student has an appointment limit restricting enrollment to a total of 6 units, Then: The student can enroll in classes with a combined total of 6 units *across* sessions A, B and C (session and term unit limits still apply). For example, if the student enrolls in 6 units in Session A, the student cannot enroll in classes in sessions B or C.

See “Understanding Enrollment and Validation Appointments” (Student Records)

See “Setting Up Enrollment and Validation Appointments” (Student Records)

See “Assigning and Maintaining Appointments for Individual Students” (Student Records)

See “Assigning Enrollment and Validation Appointments in Batch” (Student Records)

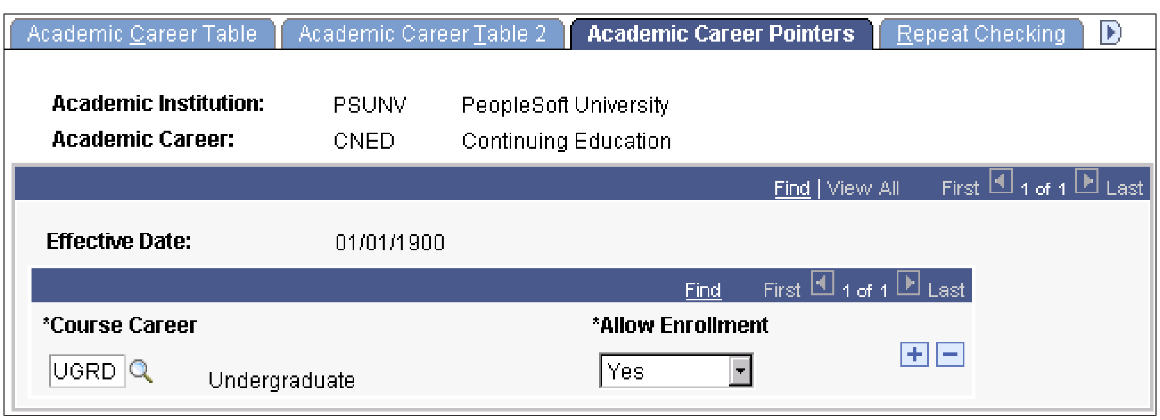
Related Links

Understanding Dynamic Academic Calendars
“Understanding Consolidated Statistics Processes” (Student Records)

Setting Up Academic Career Pointers

Access the Academic Career Pointers page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Academic Career Pointers**).

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



On the Career Pointer Exception page, you can set specific exceptions to the academic career pointers on the Academic Career Pointers page. For example, you might want to set the academic career pointers for the undergraduate career so that undergraduate students can, with permission, enroll in graduate, graduate business, and law courses; can always enroll in undergraduate and continuing education courses; and can never enroll in courses from any other academic career.

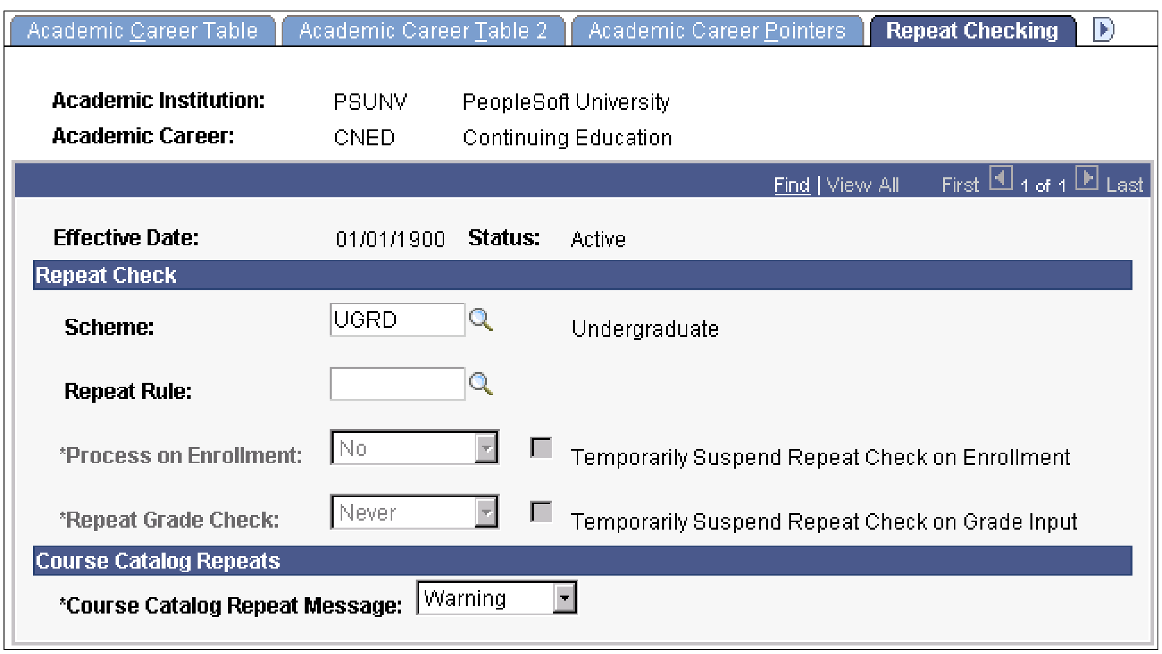
Note: Enter values for all possible academic careers, including the ones in which the student cannot enroll in courses. Although the system permits you to omit academic careers in which the student cannot enroll, this practice is not recommended.

Field or Control	***Description***
Course Career	Enter each academic career that you have defined for a particular academic institution.
Allow Enrollment	Enter whether a student can enroll in an academic career. Allow Enrollment Values are: translate values. Values are: *Yes, No,* and *Permission.* Selecting *Permission* requires the student to have a general permission or a student-specific permission at enrollment time.

Setting Repeat Checking Controls for Academic Careers

Access the Repeat Checking page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Repeat Checking**).

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



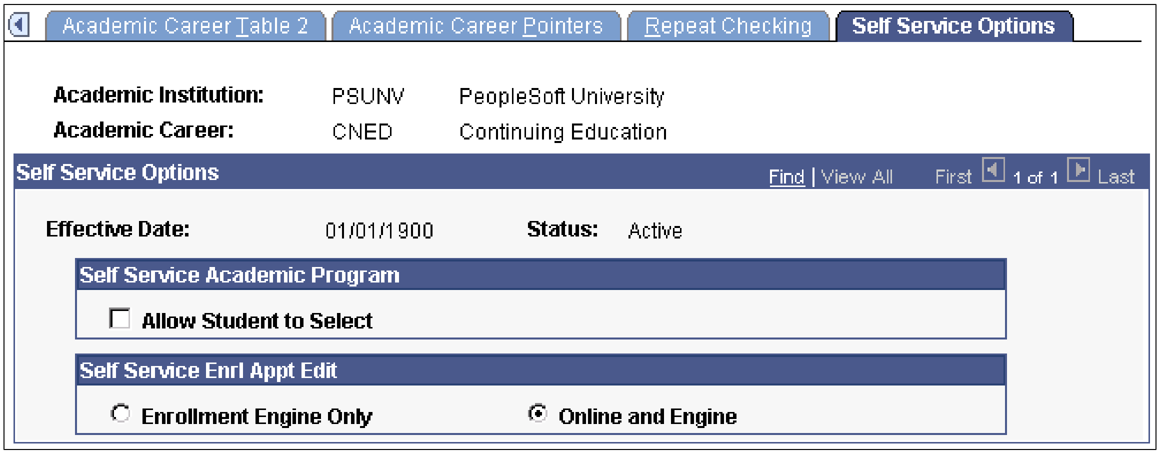
Related Links

"Setting Up Repeat Checking for Academic Careers" (Student Records)

Setting Up Self-Service Options

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

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



Self Service Academic Program

Field or Control	***Description***
Allow Student to Select	This check box works in combination with the **Select Acad Prog During Enroll** (select academic program during enrollment) check box on the Academic Institution 5 page to control whether a student who is active in more than one academic program can assign a program to a class when the student enrols in or swaps to that class. When you select the **Select Acad Prog During Enroll** check box on the Academic Institution 5 page, the **Academic Program** prompt becomes available for administrative users on the Quick Enroll page and Enrollment Request page when a student has two or more active academic programs. To allow students to select a program in Self Service, you must *also* select the **Allow Student to Select** check box here on the Self Service Options page *as well as* the **Select Acad Prog During Enroll** check box. For information about the Academic Institution 5 page: See “Setting Up Repeat Checking for Academic Careers” (Student Records).

Self Service Enrl Appt Edit

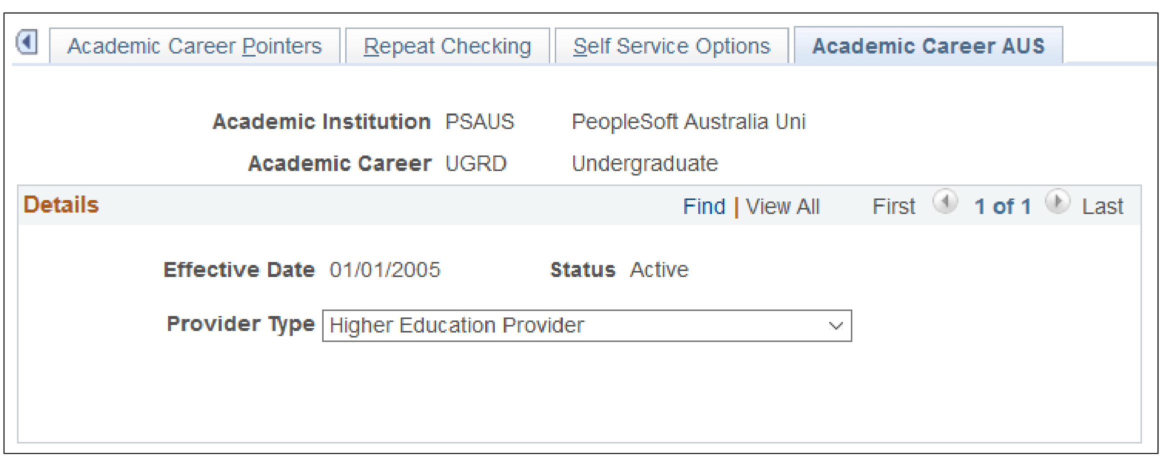
Field or Control	***Description***
Enrollment Engine Only	Select this option to have the enrollment engine enforce enrollment appointments in self-service enrollment only when a student submits an enrollment request with an action of enroll or swap for processing by the enrollment engine.
Online and Engine	Select this option to have the system validate enrollment appointments in self-service enrollment when a student selects a term on the Select Enrollment Term Search page, and when the student enters or selects a class number on the Add Classes, Drop/Update Class, or Swap Classes pages. If the student does not have a valid enrollment appointment or if the open enrollment period for the session that the student is trying to enroll in has not yet begun, these edits prevent the student from submitting enrollment requests. When a qualifying student does submit an enrollment request with an action of enroll or swap, the enrollment engine still enforces enrollment appointments during processing. The system selects this option by default.

Note: Modification of these translate values requires significant programming effort.

Setting Up Academic Careers for Australia

Access the Academic Career AUS page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Academic Career AUS**).

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



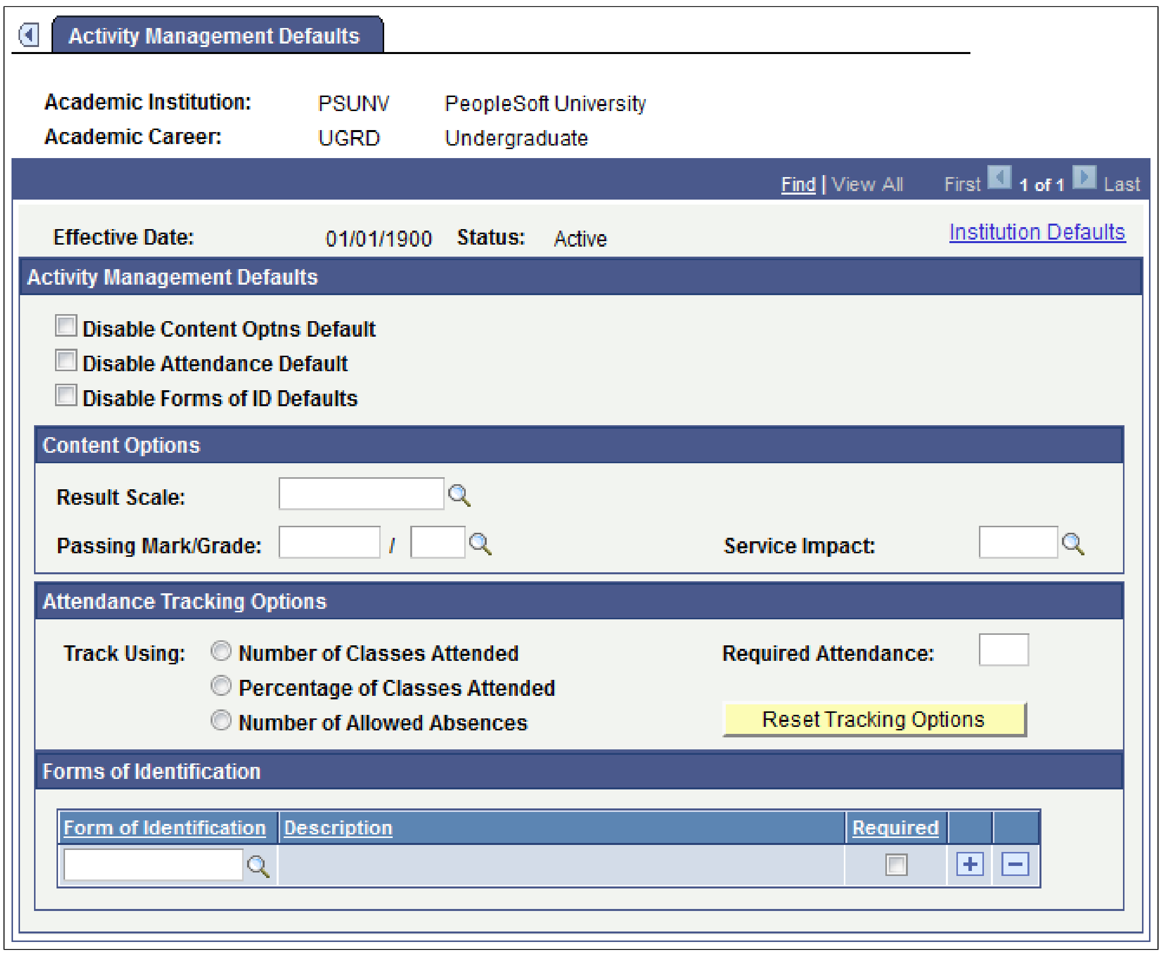
Use this page to set up Australian-specific attributes for academic careers.

Field or Control	Description
Provider Type	Select a HEIMS provider. If you don't select a value, the record isn't reported.

Establishing Activity Management Defaults for Academic Careers

Access the Activity Management Defaults page for academic careers (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Career Table** > **Activity Management Defaults**).

This example illustrates the fields and controls on the Activity Management Defaults page for academic careers. You can find definitions for the fields and controls later on this page.



This page is available when the **Enable Career Defaults** field is selected on the Academic Institution 9 page. All fields are defined on the Academic Institution 9 page, but you can set values here specific to an academic career.

Anonymous Grading

Field or Control	***Description***
Override	Select to override the default settings from the Academic Institution table. When you override the default settings, you can change how anonymous grading is displayed at this level as well as disable anonymous grading.

Creating Career Pointer Exception Rules

To set up career pointer exception rules, use the Career Pointer Exception Rule component (CAR_PTR_EXCEPTIONS).

This section provides an overview of career pointer exception rules and discusses how to define career pointer exception rules.

Understanding Career Pointer Exception Rules

Career pointer exception rules enable you to define exceptions to the regular academic career pointer guidelines from the Academic Career Pointers page. When students in academic programs with career pointer exception rules attempt to enroll in courses, the enrollment engine looks at the career pointer exception rule as defined on the Career Pointer Exception Rule page before proceeding to the academic career pointers as defined on the Academic Career Pointers page.

You can create career pointer exception rules to define the academic groups, subject areas, and catalog numbers into which a student can enroll. Then you can connect these career pointer exception rules to academic programs as necessary. Career pointer exception rules are connected to academic programs with the **Career Pointer Exception Rule** field on the Academic Program page. If that field is empty, the enrollment engine checks only the academic career pointer guidelines.

This list summarizes the system checks that occur during enrollment engine processing:

1. The enrollment checks the academic group, subject area, and catalog number of the requested course against the values entered on the Career Pointer Exception Rule page.

   Enrollment verifies that the maximum catalog number that is less than or equal to the request course exists. If there is no match, the check proceeds to the next step.

2. The enrollment checks the academic group and subject area of the requested course plus a catalog number with a value of null against the values entered on the Career Pointer Exception Rule page.

   The enrollment verifies that the catalog numbers for that entire academic group and subject area combination have not been restricted. If the enrollment finds no match, the check proceeds to the next step.

3. The enrollment checks the academic group of the requested course, a subject area with a value of null, and the catalog number of the requested course against the values entered on the Career Pointer Exception Rule page.

   Enrollment verifies that the maximum catalog number that is less than or equal to the request course exists. If there is no match, the check proceeds to the next step.

4. The enrollment checks the academic group of the requested course, subject area with a value of null, and a catalog number with a value of null against the values entered on the Career Pointer Exception Rule page.

   The enrollment verifies that all subject areas and catalog numbers for the entire academic group have not been restricted. If the enrollment finds no match, it uses the enrollment request for the academic career pointers as defined on the Academic Career Pointers page.

This series of checks assures that the student, according to her or his academic career, is permitted to enroll in the requested course.

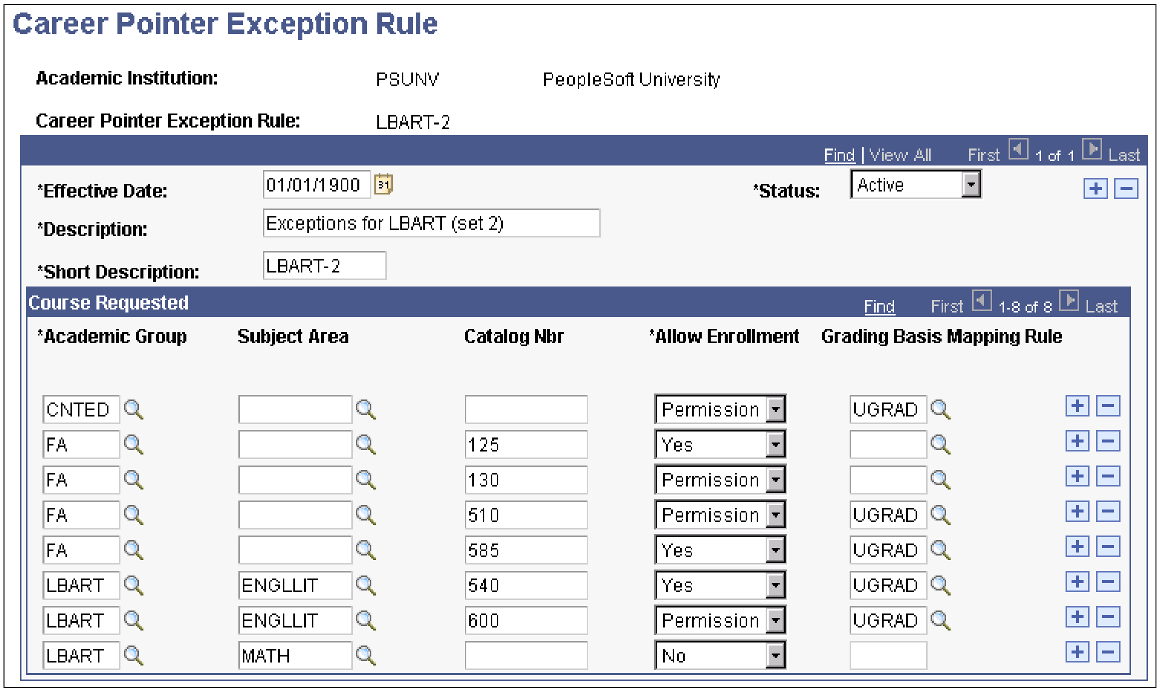
Page Used to Create Career Pointer Exception Rules

Page Name	***Definition Name***	***Navigation***	***Usage***
Career Pointer Exception Rule	CAR_PTR_EXCEPTIONS	**Set Up SACR** > **Foundation Tables Academic Structure** > **Career Pointer Exception Rule** > **Career Pointer Exception Rule**	Define all possible career pointer exception rules—the exceptions to the academic career pointer guidelines established on the Academic Career Pointers page. After you define the career pointer exception rules, the institution can attach them to academic programs to ensure that students within an academic program can enroll only in permissible courses.

Defining Career Pointer Exception Rules

Access the Career Pointer Exception Rule page (**Set Up SACR** > **Foundation Tables Academic Structure** > **Career Pointer Exception Rule** > **Career Pointer Exception Rule**).

This example illustrates the fields and controls on the Career Pointer Exception Rule page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Academic Group	Enter the academic group in which a student can request a course.
Subject Area	Enter the subject area within the academic group in which a student can request a course. To indicate all subject areas, leave this field blank. Otherwise, insert rows to specify each subject area within the academic group for which you want to create a rule.
Catalog Nbr (catalog number)	Enter the starting catalog number within the academic group or subject area in which a student can request a course. To indicate all catalog numbers within a subject area or academic group, leave this field blank.
Allow Enrollment	Enter whether a student is permitted enrollment in courses that match the criteria specified in the previous fields. Allow Enrollment Values are: delivered with the system as translate values. Values are: *Yes, No,* and *Permission.* Entering *Permission* requires the student to have a general permission or a student-specific permission at enrollment time.
Grading Basis Mapping Rule	Enter the grading basis mapping rule for the requested courses. Define grading basis mapping rule values on the Grading Basis Exception Rule page. The system uses the grading basis mapping rule to translate grades earned in another academic group to valid grades within a student's academic career.

Related Links

“Understanding Class Permissions” (Student Records)
“Defining Grading Basis Exception Rules” (Student Records)

Defining Academic Level and Load Rules

To set up academic level and load rules, use the Level/Load Rules Table component (LVL_ST_RULE_TBL).

Use the Level/Load Rules component to define academic level and academic load rules for every academic career at your institution. Various system processes use these rules to determine a student's academic level and academic load—processes such as class enrollment, financial aid reporting, and the consolidation of academic statistics.

This section discusses how to:

- Define academic level and load determination values.
- Define level rules.
- (AUS) Define level dependent load rules.
- Define load rules.
- Define contiguous term load rules.

Related Links

“Understanding Managing Financial Aid Terms” (Financial Aid)
“Understanding Consolidating and Reporting Academic Statistics” (Student Records)

Pages Used to Define Academic Level and Load Rules

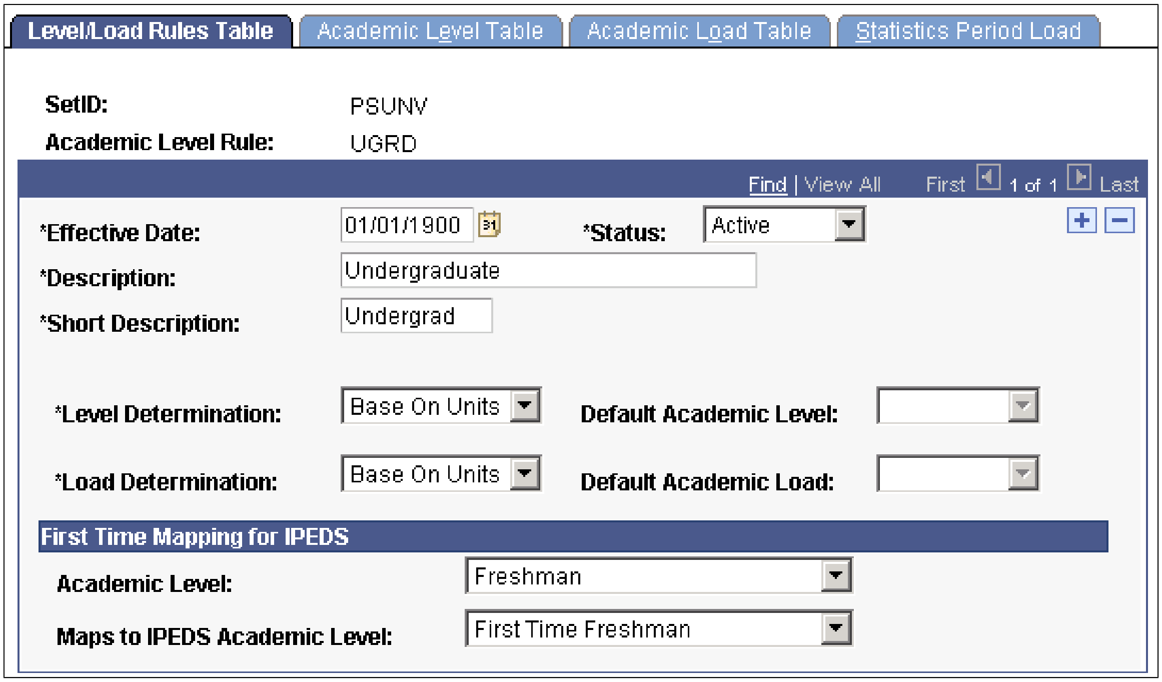
Page Name	***Definition Name***	***Navigation***	***Usage***
Level/Load Rules Table	LVL_ST_RULE_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Level/Load Rules Table**	For each academic level rule, specify how the system processes must determine a student's academic level and academic load, and define how the Consolidate Academic Statistics process must map academic levels to Integrated Postsecondary Education Data System (IPEDS) academic levels.

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Level Table	ACAD_LEVEL_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Academic Level Table**	Associate academic levels with cumulative units or terms to link the academic levels to the corresponding National Student Loan Data System (NSLDS) loan years, and to link academic levels with federal direct lending years.
Level Dependent Load Rules	SSR_LVL_LOAD_AUS	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Level Dependent Load Rules**	Define values used for Australian EFTSL (equivalent full-time student load) and HECS (Higher Education Contribution Scheme) calculations. Page functionality is similar to the Academic Load Table page.
Academic Load Table	ACAD_LOAD_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Academic Load Table**	Define academic load rules, financial aid load rules, and NSC academic load rules.
Statistics Period Load	ACAD_LOAD2_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Statistics Period Load**	For contiguous terms, define the academic load rules, NSC academic load rules, and financial aid load rules. Contiguous terms are consecutive terms in which you combine academic load information.

Defining Academic Level and Load Determination Values

Access the Level/Load Rules Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Level/Load Rules Table**).

This example illustrates the fields and controls on the Level/Load Rules Table page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Status	Select a status for this academic level rule. Enter *Active* when adding a new academic level rule. Select*Inactive* only if your institution no longer uses this academic level rule.
Description and **Short Description**	Enter a description and short description for the academic level rule.

Field or Control	*Description*
Level Determination	Select how the academic level is determined for a student's STDNT_CAR_TERM record during term activation (in the background or online). Levels can be calculated in one of four ways: *Base on Units:* Select to have the system assign an academic level based on the student's cumulative units (those designated as earned credit). The system includes articulated transfer units in this count. *Default:* Select to have the system assign an academic level for each term based on the previous STDNT_CAR_TERM record academic level. If you enter this value, the system requires you to enter a value in the **Default Academic Level** field. *Manually Input:* Select to manually assign an academic level for each student and each term on the Term Activation page. After you manually assign an academic level for the student's initial term activation record, the original value automatically copies forward (and never increments) during all future online or batch term activation processes. For some programs, you may want this behavior (for example, you may always want to assign the *Graduate*academic level to graduate students, regardless of their progress). For other programs, you may want to initially assign the value manually and update it manually each term. ***Warning!*** If you select *Manually Input,* you must assign an academic level on the Term Activation page. Although students in programs assigned to a manual level and load rule can be included in the batch process (depending on the selection criteria used), the process assigns a system-generated level value of *NST.* *Term Progression:* Select to have the system assign an academic level based on the student's cumulative terms. The system counts all terms that have a STDNT_CAR_TERM record. The system includes transfer terms that have term activation records in this count.
Default Academic Level	This field is required if you selected *Default* in the **Level Determination** field. The system assigns this default value to the STDNT_CAR_TERM record during term activation in the event that no prior STDNT_CAR_TERM record exists from which the system can copy the academic level. Values for this field are delivered with your system as translate values. You can modify these values.

Field or Control	Description
Load Determination	Select how the system calculates academic load. Academic load can be entered manually for a student on the Term Activation page. Select one of the following values: *Base on Units:* Select to have the system assign an academic load based on the student's cumulative units (those designated as earned credit). The system includes articulated transfer units in this count. If you select this value, the Academic Load Table page becomes active and you can indicate which terms should be included in the annual load calculation. (AUS) You can select this value for HECS calculations. *Default:* Select to have the system assign an academic load for each term based on the previous STDNT_CAR_TERM record academic load. If you select *Default,* the system requires you to enter a value in the **Default Academic Load** field. *Manually Input:* Select to manually assign an academic load for each student and each term on the Term Activation page. (AUS) *Units By Level:* This value is assigned for academic level rules that use the HECS feature. Select this value to enable the Level Dependent Load Rules page, which you can use instead of the Academic Load Table page to calculate a student's HECS Load factor.
Default Academic Load	This field is required if you selected *Default* in the **Load Determination** field. The system assigns this default value to the STDNT_CAR_TERM record during term activation in the event that no STDNT_CAR_TERM record exists from which the system can copy the academic load. Values for this field are delivered with your system as translate values. You can modify these values. When you run the Consolidate Academic Statistics process for an academic statistics period for which you have set the **Academic Load Rule** field on the Academic Statistics Period page to *Term Load Rule Applies* and you have set the **Load Determination** field on this page to *Base on Units,* the process uses the academic load rules from the Academic Level Table page to determine a student's academic load, NSC academic load, and financial aid load. If you have set the **Load Determination** field on this page to *Manually Input* or *Default,* the Consolidate Academic Statistics process uses the student's career-term record or the value in the **Default Academic Load** field to determine the student's academic load, regardless of the setting for the **Academic Load Rule** field on the Academic Statistics Period page.

(AUS) EFTSL Values and HECS Load Factor

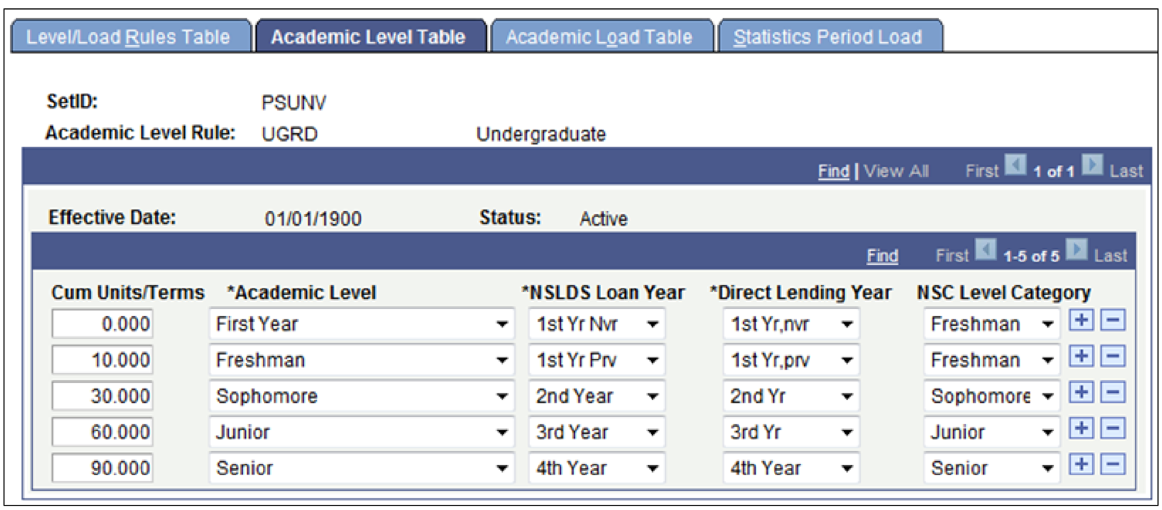
Tuition Calculation for HECS currently calculates the HECS Load Factor, which is generally equal to the EFTSL value for a class. However, HECS is not calculated for all enrolled students. For example, HECS is not calculated for full-fee paying overseas students. In some cases, the HECS Load Factor may be different from the EFTSL value for a class. An example is a student who may complete a work experience class that contributes units to his progression, but for which there are no HECS charges (as the class may not consume institution resources). In this case, the billing units for the class should be made zero, but Academic Progress Units should be given. The HECS Load Factor is a calculation based on billing units, and the EFTSL calculation is based on Academic Progress Units. In this case, the HECS Load Factor is zero, but the EFTSL still has a value. Since EFTSL is required for every student, the system calculates EFTSL as a separate process.

You must ensure that the load/level rules are set up to reflect the full-time load for different programs. For example, the full-time load/level rules for one program may include a summer term as full-time compulsory attendance, while other programs may consider the summer term as an additional term for students to undertake study above the ordinary full-time load. When setting up the level/load rules, you can indicate whether or not the term should be included in the annual load calculation. For example, if the summer term is not considered part of the full-time load and the student takes summer classes, the student's annual EFTSL will be greater than if the student enrolled in a full-time load only for the other terms in the academic year.

Defining Level Rules

Access the Academic Level Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Academic Level Table**).

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



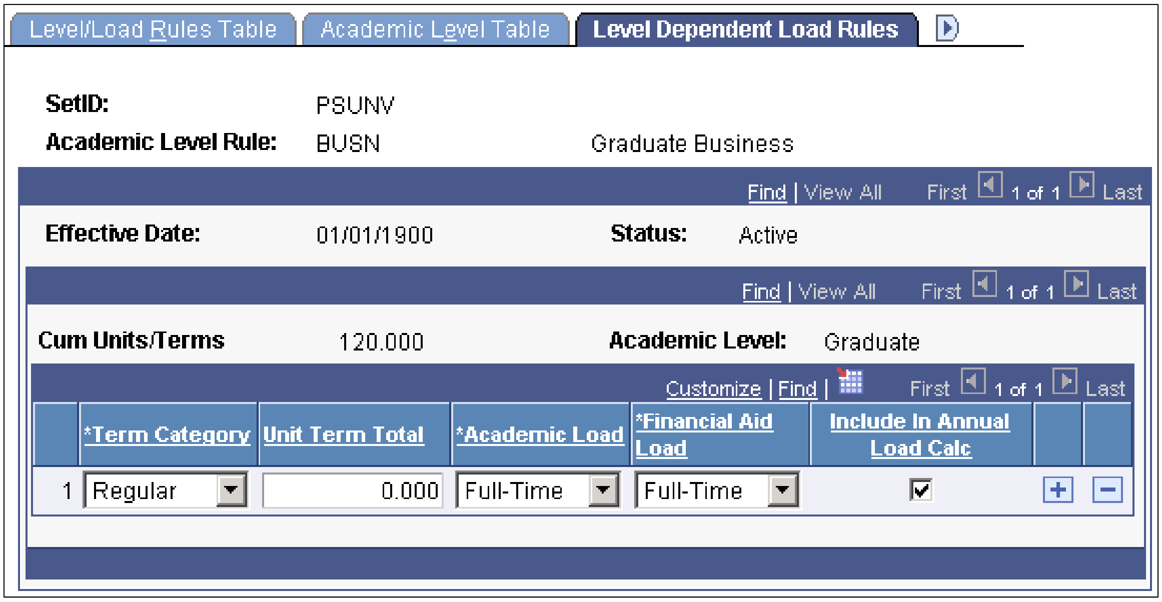
Field or Control	***Description***
Cum Units/Terms (cumulative units or terms)	Enter the minimum number of cumulative units or terms that the system requires before it assigns a student to a corresponding academic level. The system uses only these values if you select Units or Terms on the Level/Load Rules Table page.

Field or Control	***Description***
Academic Level	Enter an academic level for each increment of cumulative units or terms that you want to associate with this level and load rule. Values for this field are delivered with your system as translate values. You can modify these values.
NSLDS Loan Year (National Student Loan Data System loan year) and **Direct Lending Year**	Enter the NSLDS loan year and direct lending year values that correspond to each academic level that you define. The PeopleSoft Financial Aid application references these values during the FA Term Build (financial aid term year) process.
NSC Level Category	Enter a NSC Level Category for only the academic level rules that are used for Bachelor's Degree—for example, an Academic Level Rule of *UGRD*. If the Consolidate Academic Statistics process finds a NSC Classification value of *Bachelor's Degree* in the Academic Plan Table component, then, based on the calculated academic level, it retrieves the appropriate NSC Level Category value here. The system uses this value (for example, Sophomore) to report the NSC Class/Credential Level. Although the Academic Level value might be the same as the NSC Level Category value, you must enter a valid value in the NSC Level Category field for NSC reporting. Note also that different academic levels can have the same category value, as in the page example above. See Defining Academic Plans. See “Understanding Consolidating and Reporting Academic Statistics” (Student Records) See “Understanding Consolidated Statistics Processes” (Student Records)

(AUS) Defining Level Dependent Load Rules

Access the Level Dependent Load Rules page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Level Dependent Load Rules**).

This example illustrates the fields and controls on the Level Dependent Load Rules page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Term Category	Select every term category that is valid for the academic load rule. Values for this field are delivered with your system as translate values. You can modify these values. **Note:** Map every term category at your institution, regardless of your load determiner (units, default, or manual).
Unit Term Total	Enter the unit term total for each term category and session type. The unit term total represents the number of units that must be taken to qualify for the academic load level and financial aid level.
Academic Load	Select the academic load value that corresponds to the unit term total. Values for this field are delivered with your system as translate values. You can modify these values.
Financial Aid Load	Select the financial aid load value. The financial aid load represents the financial aid load level equivalent to the academic load value. Values for this field are delivered with your system as translate values. You can modify these values.
Include in Annual Load Calc (include in annual load calculation)	Select this check box to include this load value in Australian EFTSL and HECS calculations. **Note:** If you use this page to include load values, do not use the Academic Load Table page.

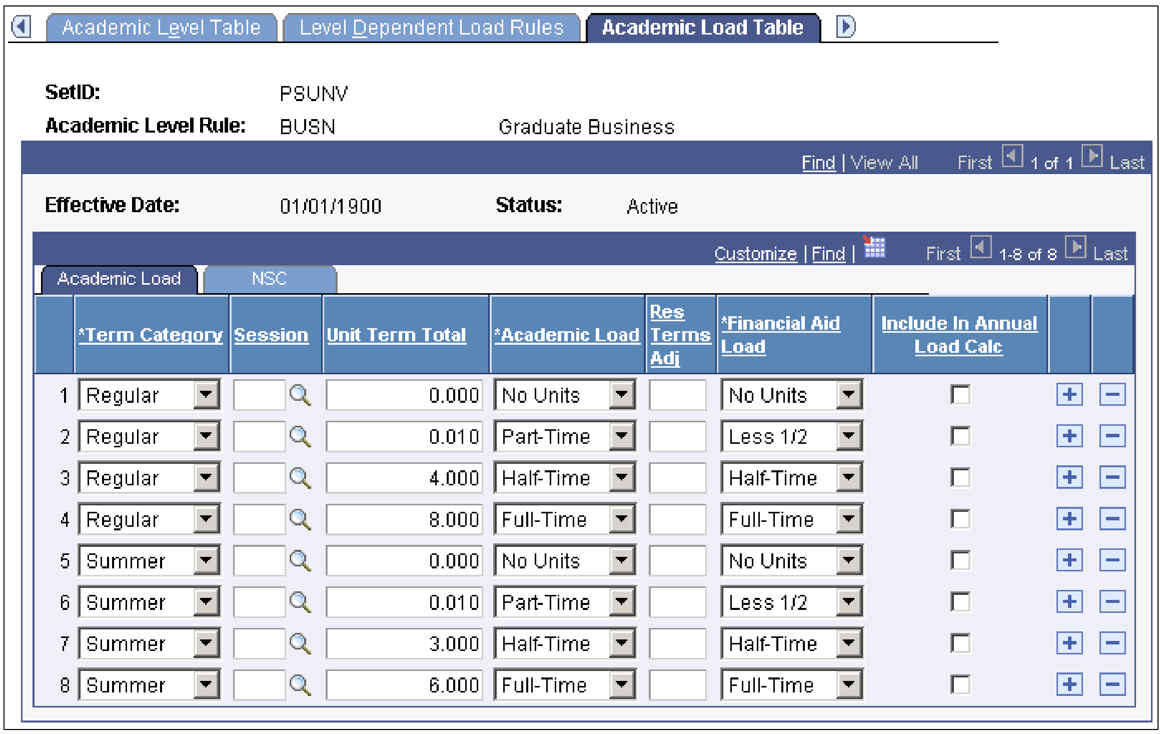
Related Links

"Understanding TCSI Reporting" (Student Records)

Defining Load Rules

Access the Academic Load Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Academic Load Table**).

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



Academic Level Table | Level Dependent Load Rules | Academic Load Table

SetID: PSUNV

Academic Level Rule: BUSN Graduate Business

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active

Customize | Find | First 1-8 of 8 Last

Academic Load | NSC

	*Term Category	Session	Unit Term Total	*Academic Load	Res Terms Adj	*Financial Aid Load	Include In Annual Load Calc
1	Regular		0.000	No Units		No Units	
2	Regular		0.010	Part-Time		Less 1/2	
3	Regular		4.000	Half-Time		Half-Time	
4	Regular		8.000	Full-Time		Full-Time	
5	Summer		0.000	No Units		No Units	
6	Summer		0.010	Part-Time		Less 1/2	
7	Summer		3.000	Half-Time		Half-Time	
8	Summer		6.000	Full-Time		Full-Time	

The Consolidate Academic Statistics process uses these rules to determine a student's academic load when it processes an Academic Statistics Period for which the academic load rule value = Term Load Rule applies.

Note: Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

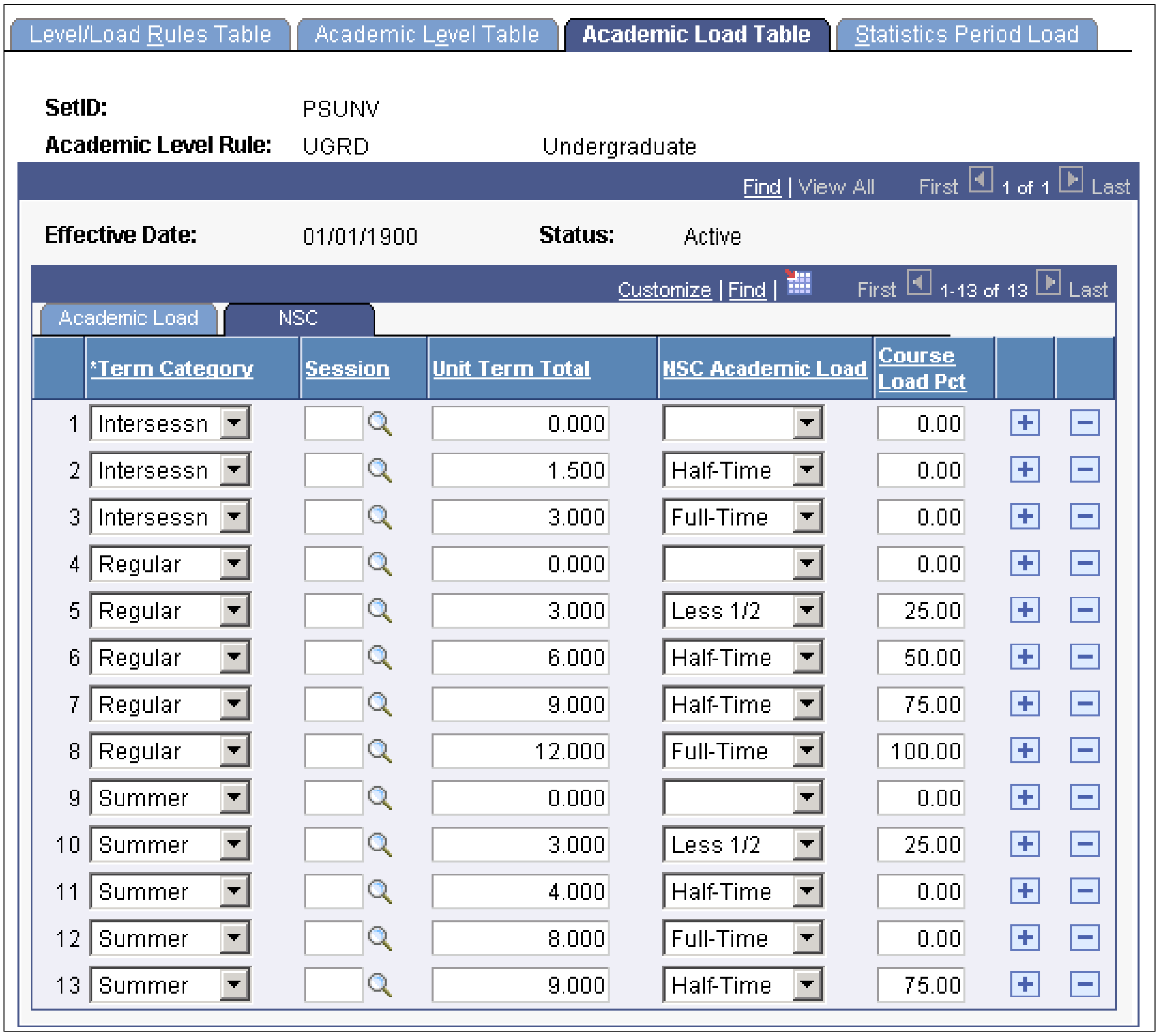
Field or Control	*Description*
Term Category	Select every term category that is valid for the academic load rule. Values for this field are delivered with your system as translate values. You can modify these values. **Note:** Map every term category at your institution, regardless of your load determiner (units, default, or manual). **Note:** To determine Enrollment Intensity for U.S. financial aid purposes, each **Term Category** should have a row where the **Financial Aid Load** is set to "Full-Time".
Session	Enter the session type for the term category if you have more than one session in a term category and the sessions have different academic loads. For example, a summer session term type might have a 10-week session, a 12-week session, and two 6-week sessions. Your institution might not calculate the academic load for the 12-week session and the 6-week sessions in the same way. **Note:** At least one row must be included with a blank session code for each term category. The system uses the row or rows with a blank session code to calculate academic load for the term. The system also calculates the load for the regular session using the row or rows with cleared sessions, which is why the term load and the regular academic session load will always be the same. In addition, a field edit prevents you from entering *1* in the **Session** field, because the system assumes that the cleared **Session** field represents the regular academic session. You must have at least one row with a blank session code for each term category in order for the system to calculate academic load based on units.
Unit Term Total	Enter the unit term total for each term category and session type. The unit term total represents the number of units that must be taken to qualify for the academic load level and financial aid level.
Academic Load	Select the academic load value that corresponds to the unit term total. Values for this field are delivered with your system as translate values. You can modify these values. **Note:** To determine Enrollment Intensity for U.S. financial aid purposes, each **Term Category** should have a row where the **Financial Aid Load** is set to "Full-Time".

Field or Control	Description
Res Terms Adj (residence terms adjust)	Enter the residence terms adjust value for each term category and session type to determine what constitutes a full term based on a student's academic load. In the exhibit, a part-time academic load is considered to be worth 50 percent of a full term, a three-quarter time academic load is considered to be worth 75 percent of a full term, and a full-time academic load is considered to be worth 100 percent of a full term. When a student is term activated, the student's approved academic load is used to determine the value of the **Terms of Residency** field based on the residence terms adjust factor. In this example, a part-time student would have a current in residence terms setting of 0.50 and a full-time student would have a setting of 1.00. The system obtains the current in residence terms value from the **Term Activation - Terms in Residence** field. See "Understanding Managing Financial Aid Terms" (Financial Aid)
Financial Aid Load	Select the financial aid load value. The financial aid load represents the financial aid load level equivalent to the academic load value. Values for this field are delivered with your system as translate values. You can modify these values. **Note:** To determine Enrollment Intensity for U.S. financial aid purposes, each **Term Category** should have a row where the **Financial Aid Load** is set to "Full-Time".
(AUS) Include in Annual Load Calc (include in annual load calculation)	Select to include this load value in Australian EFTSL and HECS calculations. **Note:** If you use this page to include load values, do not use the Level Dependent Load Rules page.

NSC Tab

Select the NSC tab.

This example illustrates the fields and controls on the Academic Load Table page: NSC tab. You can find definitions for the fields and controls later on this page.

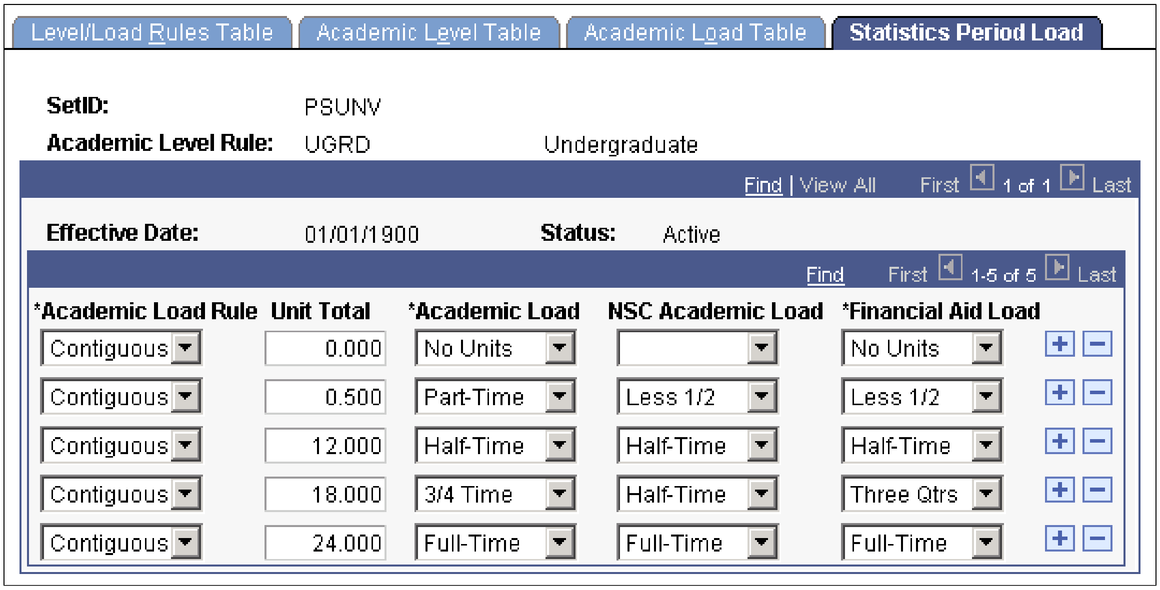


Field or Control	*Description*
NSC Academic Load (National Student Clearinghouse academic load)	Select the academic load value that your institution reports to the NSC. Values for this field are delivered with your system as translate values. You can modify these values.
Course Load Pct (course load percent)	Enter the course percentage for the NSC academic load. For example, if you entered *Half-Time* for your NSC academic load, enter *50* (50 percent).

Defining Contiguous Term Load Rules

Access the Statistics Period Load page ((**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Level/Load Rules Table** > **Statistics Period Load**).

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



The Consolidate Academic Statistics process uses the rules on this page to determine a student's academic load when it processes an Academic Statistics Period during which the academic load rule value = Contiguous Terms.

Note: For the Consolidate Academic Statistics process to effectively combine a student's academic loads for contiguous terms, be sure that you define contiguous term academic load rules for every academic level rule at your institution.

Field or Control	***Description***
Academic Load Rule	Select *Contiguous* if you plan to use the Consolidated Academic Statistics process to combine a student's academic load unit totals for consecutive terms. If you do not use the Consolidated Academic Statistics process, clear this field and the other fields on this page.
Unit Total	Enter the unit total for each contiguous term academic load rule. The unit term total represents the number of units that a student must take to qualify for the academic loads that you define on any given row of this page.
Academic Load	Select the academic load value that corresponds to the unit total for the row. Values for this field are delivered with your system as translate values. You can modify these values.
NSC Academic Load (National Student Clearinghouse academic load)	Select the NSC academic load value that corresponds to the unit total for the row. The NSC Extract process uses the NSC academic load for NSC reporting purposes. Values for this field are delivered with your system as translate values. You can modify these values.

Field or Control	*Description*
Financial Aid Load	Select the financial aid load value corresponding to the unit total for the row. The financial aid load is the financial aid equivalent of the academic load for the row. Values for this field are delivered with your system as translate values. You can modify these values.

Defining Academic Organizations

To set up academic organizations, use the Academic Organization Table component (ACADEMIC_ORG_TBL).

This section provides an overview of academic organizations and discusses how to:

- Modify academic organizations.
- Designate financial ownership for academic organizations.
- Designate human resource ownership for academic organizations.
- Establish Activity Management defaults for academic organizations.

Understanding Academic Organizations

Academic organization structure defines how an academic institution is organized from an administrative perspective. At the lowest level, an academic organization can be compared to an academic department. At the highest level, an academic organization can represent a division.

Before you begin using academic organizations, you must first use PeopleSoft Tree Manager, which you access through PeopleTools, to define the academic organizations themselves, the hierarchy and levels of each academic organization, and the relationship between academic organizations in the hierarchy. One of the primary uses of the tree is to partition an academic institution for security purposes, controlling such areas as a user's access to course catalog data. The number and names of the levels in the academic organization tree can be revised by the institution by using PeopleTools.

Use the Academic Organization component to modify academic organization descriptions and to link each academic organization to one or more financial support or human resources departments on a percentage ownership basis. These relationships are used to report, analyze, and distribute revenue and workload credit.

See *PeopleTools: Tree Manager*

Related Links

Securing Academic Organizations

Pages Used to Define Academic Organizations

Page Name	*Definition Name*	*Navigation*	*Usage*
Academic Organization Table	ACADEMIC_ORG_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Academic Organization Table**	Modify descriptions of academic organizations; link an academic institution, campus, and manager to academic organizations; and define how the institution assigns instructors to classes. The system displays information entered through the academic organization tree in PeopleSoft Tree Manager. You can modify this information.
Acad Organization FS Owner (academic organization financial services owner)	ACAD_ORG_FSOWN_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Acad Organization FS Owner**	Designate the financial services department (business unit) responsible for this academic organization. You can use these relationships to report, analyze, and distribute revenue and workload credit. Relationships designated here have no effect on security.
Acad Organization HR Owner (academic organization human resources owner)	ACAD_ORG_HROWN_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Acad Organization HR Owner**	Designate the human resources department responsible for this academic organization. Use these relationships to report, analyze, and distribute revenue and workload credit. Relationships designated here have no effect on security.
Activity Management Defaults (academic org)	ACAD_ORG_AM_DFLTS	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Activity Management Defaults**	Set Activity Management default values specific to an academic organization.

Modifying Academic Organizations

Access the Academic Organization Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Academic Organization Table).**).

Warning! If you are adding new academic organizations directly to this page, the academic institution value on the academic organization record *must* be the same as the academic institution that owns it in the academic organization tree. If these two values are not synchronized, security and reporting are adversely affected. Therefore, you should add new academic organizations through PeopleSoft Tree Manager.
The system populates the **Effective Date, Status, Description, Short Description, Formal Description, Academic Institution,** and **Campus** fields from the academic organization tree in PeopleSoft Tree Manager.

Field or Control	***Description***
Academic Institution	Enter the academic institution to which this academic organization belongs. This academic institution value must be the same as the academic institution on the academic organization tree. If these two Values are: not synchronized, security and reporting are adversely affected.
(AUS) AOU Code (academic organization unit code)	Enter a code to link an academic organization unit (AOU) code to an academic organization.
Campus	Enter the campus to which this academic organization belongs.
Manager ID	Enter the manager for the academic organization, such as the department chair. This value is informational only and is currently not used in any internal system processes.

Edit Instructor Against

In this group box, select the view that the system should use when users search for an instructor to assign to classes while scheduling classes. Options are:

Field or Control	***Description***
Personal Data	This field is used for reporting purposes only.
Instructor Advisor	People defined as instructors and advisors in the Instructor/Advisor Table component. The Instructor/Advisor component enables you to link instructors to courses for which they are approved and available to teach for specified periods of time. When you are scheduling classes and entering an instructor, the system displays only these instructors, thus simplifying the assignment of instructors to classes.

Assign Instructor By

If you select the **Instructor Advisor** option in the **Edit Instructor Against** group box, the **Assign Instructor By** group box becomes available. Select how the institution wants to assign instructors for this academic organization. You can select one, none, or any combination of these options: *Campus, Subject,* and *Course.* If you select none of these options, the instructor advisor edit applies to all courses within this academic organization.

Remember that for whichever options you select, you must define these same options for each instructor on the Approved Courses page of the Instructor/Advisor Table component. Only then does the instructor's name appear as a choice for the **Instructor ID** field on the Meetings page or Exam page when you schedule classes. For example, if you select the **Subject** and **Campus** options, you must enter values for both the **Subject** and **Campus** fields on the Approved Courses page to make the instructor approved and available for instruction.

Warning! Changing the saved selection for the **Edit Instructor Against** or **Assign Instructor By** group boxes removes an instructor's course rows on the Approved Courses page for the academic organization. The system, however, does maintain the rows for other academic organizations.

Related Links

"Designating Approved Instructors and Advisors" (Student Records)

Designating Financial Ownership for Academic Organizations

Access the Acad Organization FS Owner page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Acad Organization FS Owner**).

Field or Control	***Description***
Business Unit	Enter the business unit considered to be the financial support unit of this academic organization.
Department	Enter the department in which the business unit is housed. Enter department values on the Department Table page.
Percent Owned	Enter the percentage of the academic organization for which the business unit is responsible. You can have multiple business units with split ownership of the academic organization, but the total percent owned among all business units must equal 100.

Designating Human Resource Ownership for Academic Organizations

Access the Acad Organization HR Owner page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Acad Organization HR Owner**).

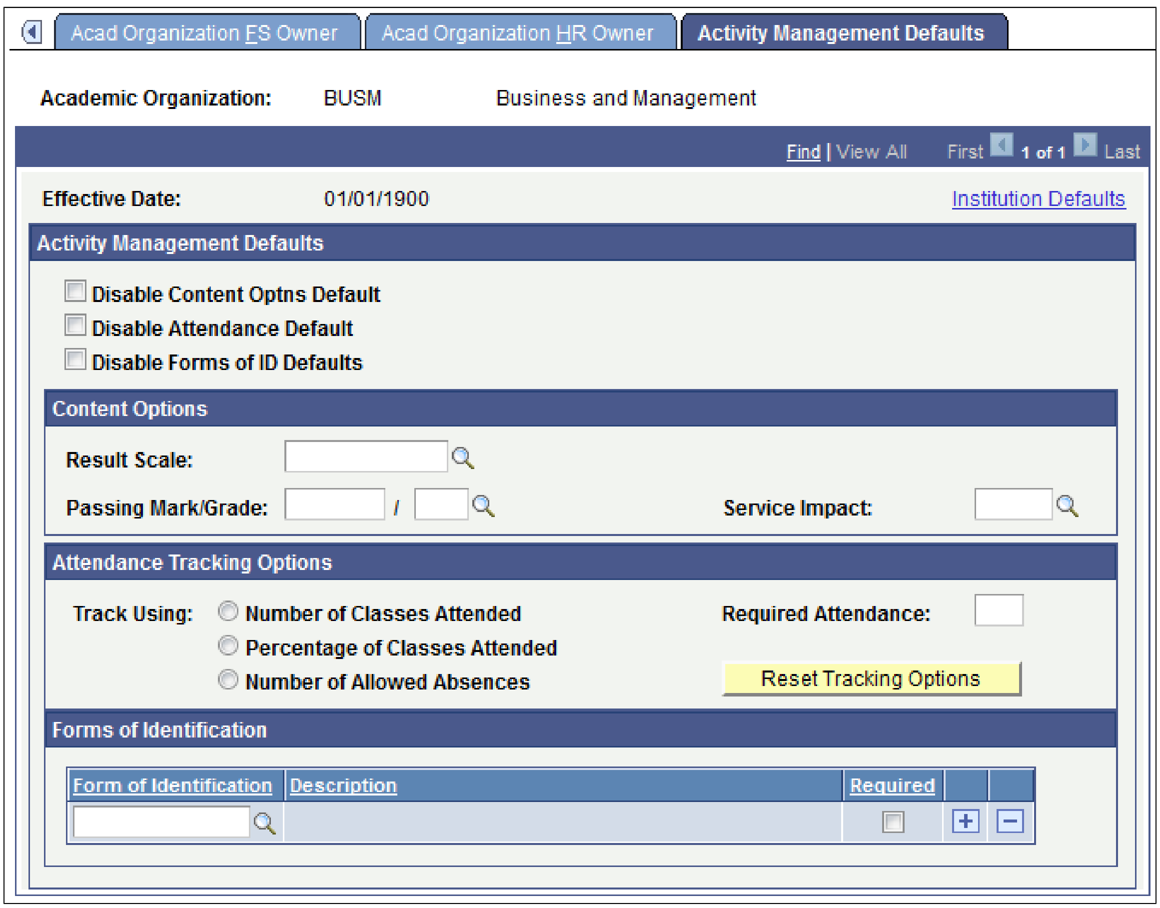
Field or Control	***Description***
Department	Enter the department responsible for human resources support for this academic organization. Enter department values on the Department Table page.

Field or Control	*Description*
Percent Owned	Enter the percentage of the academic organization for which the human resources department is responsible. You can have multiple human resources departments with split ownership of the academic organization, but the total percent owned among all departments must equal 100.

Establishing Activity Management Defaults for Academic Organizations

Access the Activity Management Defaults page for academic organizations (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Organization Table** > **Activity Management Defaults**).

This example illustrates the fields and controls on the Activity Management Defaults page for academic organizations. You can find definitions for the fields and controls later on this page.



This page is available when **Enable Academic Org Defaults** field is selected on the Academic Institution 9 page. All fields are defined on the Academic Institution 9 page, but you can set values here specific to an academic organization.

Anonymous Grading

Field or Control	*Description*
Override	Select to override the default settings from the Academic Institution table. When you override the default settings, you can change how anonymous grading is displayed at this level as well as disable anonymous grading.

Related Links

“Setting Up Anonymous Grading” (Student Records)

Defining Academic Groups

To set up academic groups, use the Academic Group Table component (ACADEMIC_GROUP_TBL).

This section provides an overview of academic groups and discusses how to:

- Describe academic groups.
- Link academic career catalog numbers to academic groups.
- Define standard class meeting patterns.

Understanding Academic Groups

Academic groups are the highest level breakdowns of the academic institution for academic structural purposes. Often each school or college within an academic institution is defined as an academic group. Sometimes units such as extended education are defined as an academic group if classes are offered separately from the standard colleges or schools. For example, PeopleSoft University comprises the College of Liberal Arts, the College of Engineering, the School of Law, the School of Education, and the Evening Extension Division. Each entity is defined as an academic group in the system. Academic groups can offer academic programs in more than one academic career, and academic careers can cross academic groups. In the previous example, the College of Liberal Arts and the College of Engineering contain both undergraduate and graduate academic careers, but the School of Law contains only one academic career, which is not shared with any other academic group.

To link an academic group to an academic institution and an academic organization, add the academic group through the Academic Group Table component *and* add the academic group as a child node to academic institutions and academic organizations in PeopleSoft Tree Manager—one aspect does not update the other aspect. In PeopleSoft Tree Manager, every node is defined by its relation to other nodes. In most cases, academic groups are defined as the next level of academic organization structure below academic institution. However, academic groups can occur at any level within the academic organization structure. It is not essential for academic groups to follow the same hierarchical structure as academic organizations. Although this is the case for most institutions, some might want to use academic groups and academic organizations to represent different dimensions of a matrix organization. In such a case, academic groups would not be child nodes in the academic organization tree but rather set apart as nodes at the same level as academic organizations.

Use the Academic Group Table component to define academic groups and link academic careers and standard class meeting patterns to them.

Pages Used to Define Academic Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Group Table	ACADEMIC_GROUP_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Group Table** > **Academic Group Table**	Describe academic groups.
Academic Career Level Table	CATLG_CAREER_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Group Table** > **Academic Career Level Table**	Link academic careers and ranges of catalog numbers to academic groups. These values serve as a data entry and tracking aid as you create the course catalog. When you enter a catalog number on the Offerings page of the Course Catalog component, the system displays the correct academic career value.
Standard Meeting Patterns	STND_MTG_PAT_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Group Table** > **Standard Meeting Patterns**	Define standard class meeting patterns for an academic group. All typical patterns must be defined here, including the to-be-announced class meeting pattern. These patterns are a data entry aid when scheduling classes.

Describing Academic Groups

Access the Academic Group Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Group Table** > **Academic Group Table**).

Course Defaults

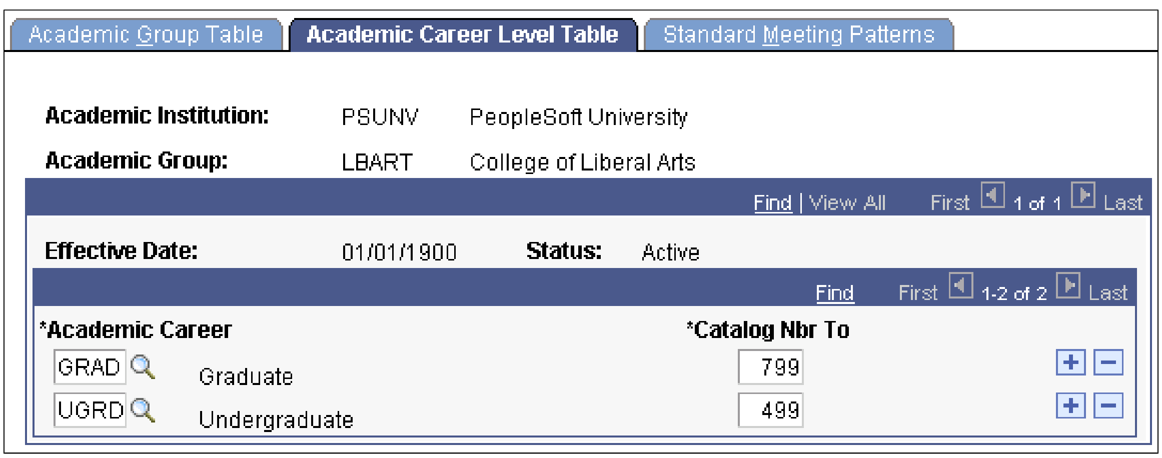
Use the **Course Defaults** group box to set default values for the course catalog and schedule of classes pages. The fields in this group box simplify data entry. You can override these default values for individual courses and classes.

Field or Control	***Description***
Student Specific Permissions	Select to have all classes scheduled within this academic institution and academic group require that you generate permissions for students to enroll in classes. The check box value migrates to the Class Schedule Entry page, where it can be overridden. Student-specific permissions require that you generate permissions for individual students.
Auto Enroll from Wait List	Select to have all classes scheduled within this academic institution and academic group automatically enroll students from waiting lists into classes whenever spaces are available and the wait list process is run. The check box value migrates to the Enrollment Control page of the schedule of classes components, where it can be overridden.

Linking Academic Career Catalog Numbers to Academic Groups

Access the Academic Career Level Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Group Table** > **Academic Career Level Table**).

This example illustrates the fields and controls on the Academic Career Level Table page. You can find definitions for the fields and controls later on this page.



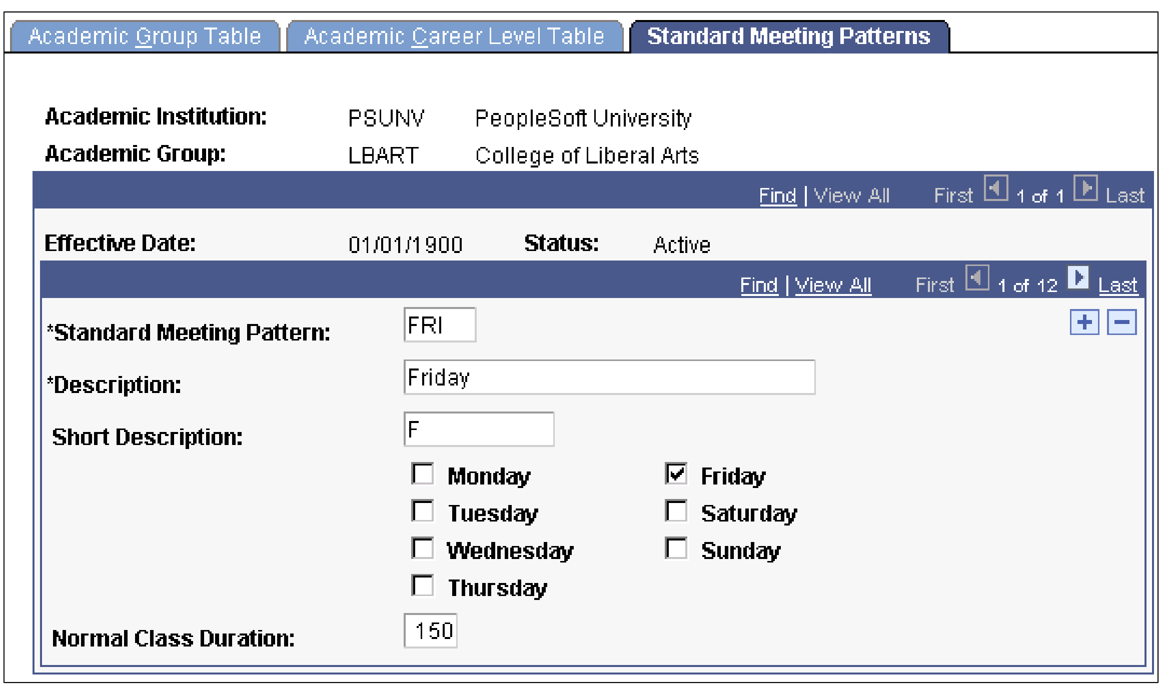
Field or Control	***Description***
Academic Career	Enter the academic career that you want to link to this academic group. Insert additional rows to enter all academic careers that you want to link to this academic group.

Field or Control	***Description***
Catalog Nbr To (catalog number to)	For each academic career that you link to this academic group, enter the course number immediately *after* the highest possible course catalog number for that academic career. For example, if the highest possible course catalog number within the College of Liberal Arts for the undergraduate academic career is 299, enter *300* in the field. Likewise, if the highest catalog number for the graduate academic career is 599, enter *600* into the field. The number that you enter defines the lowest possible catalog number for the subsequent academic career within this academic group. In this example, 300 would be the first catalog number of the graduate academic career within the College of Liberal Arts. When you create a new course offering on the Offerings page of the Course Catalog component, the system displays the academic career value based on the academic career and catalog number combinations from this page. In the preceding example, if you create a course within the College of Liberal Arts with a catalog number of 300, the system displays the academic career *Graduate.* If the catalog number is 299, the system displays the academic career *Undergraduate.*

Defining Standard Class Meeting Patterns

Access the Standard Meeting Patterns page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Group Table** > **Standard Meeting Patterns**).

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



Field or Control	*Description*
Standard Meeting Pattern	Enter a code to represent the standard class meeting pattern for this academic group. Insert additional rows to add more standard meeting patterns for this academic group.
Monday, Tuesday, Wednesday, ThursdayFriday, Saturday, and **Sunday**	Select the appropriate days of the week for this standard meeting pattern.
Normal Class Duration	Enter the number of minutes for each class in this standard meeting pattern.

Establishing Fields of Study

To set up fields of study, use the Field of Study Table component (STUDY_FIELD_TABLE).

This section lists the page used to establish fields of study.

Page Used to Establish Fields of Study

Page Name	*Definition Name*	*Navigation*	*Usage*
Field of Study Table	STUDY_FIELD_TABLE	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Field of Study Table** > **Field of Study Table**	Define fields of study. Link fields of study to academic subjects on the Subject Taxonomy page and to academic plans on the Academic Plan Taxonomy page.

Modifying CIP and HEGIS Codes

To set up CIP and HEGIS codes, use the CIP Code Table component (CIP_CODE_TABLE) and the HEGIS Code Table component (HEGIS_CODE_TABLE). Use the SSR_CIP_CODE_TABLE and SSR_HEGIS_CODE_TABLE component interfaces to load the data into the tables for these component interfaces.

CIP and HEGIS codes are delivered with the system. You can modify descriptions of the codes and add new codes through the CIP Code Table page and the HEGIS Code Table page. This section discusses how to modify CIP and HEGIS codes.

Pages Used to Modify CIP and HEGIS Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
CIP Code Table	CIP_CODE_TABLE	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **CIP Code Table** > **CIP Code Table**	Modify descriptions of the CIP codes shipped with Campus Solutions.
HEGIS Code Table	HEGIS_CODE_TABLE	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **HEGIS Code Table** > **HEGIS Code Table**	Modify descriptions of the HEGIS codes shipped with Campus Solutions.

Modifying CIP Codes

Access the CIP Code Table page (**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **CIP Code Table** > **CIP Code Table**).

Field or Control	***Description***
Alternative CIP Code (alternative classification of instructional programs code)	Some states derive their own coding schemes from the CIP code. If applicable, enter the alternative CIP code of the state.
Valid SEVIS CIP Code	Select *Yes* to indicate that the code is the valid SEVIS CIP code for the area of study. Select *No* if either the code is not the valid SEVIS CIP code or you are unsure if it is the valid SEVIS CIP code. When **Valid SEVIS CIP Code** is set to *Yes* for a code, the Validate SEVIS CIP Code process available from within the SEVIS Alerts process, can compare the CIP code in an event to the valid code and if the codes do not match, the process can generate and display an error message in the alerts. When the **Valid SEVIS CIP Code** is set to *No* for a code, the validation process generates an error message that appears in the alerts. See “Understanding SEVIS Visa Processing” (Campus Community Fundamentals)

Modifying HEGIS Codes

Access the HEGIS Code Table page ((**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **HEGIS Code Table** > **HEGIS Code Table**).

(NLD) HEGIS Code Information

Field or Control	*Description*
Hegis Code Type	Enter a code type. Two types of code are available, one for a training program and one for a training course.
External Org ID (external organization ID)	Enter an ID. This value is used for MBO codes.
Education level	Enter the level of education for which the code is offered.
Lob Code (line of business)	Enter the internal code of a national institution for the subqualification.
Course Ref Code (course reference code)	Enter the course to which the code is linked.
Partial Qualification	Select whenever the code is being used for a subqualification or a course.
Final Qualification	Select whenever the code is being used for a qualification or a training program.

Defining Subject Areas

To set up subject areas, use the Academic Subject Table component (SUBJECT_TABLE).

This section provides an overview of subject areas and discusses how to:

- Describe subject areas.
- Define subject area taxonomy.
- Define subject and component multipliers.

Understanding Subject Areas

Subject areas are the specific areas of instruction in which courses are offered within academic organizations. For example, when a course is identified as Math 101, math is the subject area. Subject areas are tied to the academic organization tree by the academic organization data for each subject area and by detail nodes for academic organizations in PeopleSoft Tree Manager. Subject areas are also tied to courses, which you link to later when developing the course catalogs.

Before using subject areas, use PeopleSoft Tree Manager, accessed through PeopleTools, to define the academic organizations and to create a hierarchical representation of subject areas by linking subject areas as detail nodes to the academic organizations. One of the primary uses of defining subject areas as detail nodes on the academic organization tree is to limit access to academic subjects.

See *PeopleTools: Tree Manager*

Related Links

Securing Access to Student Data

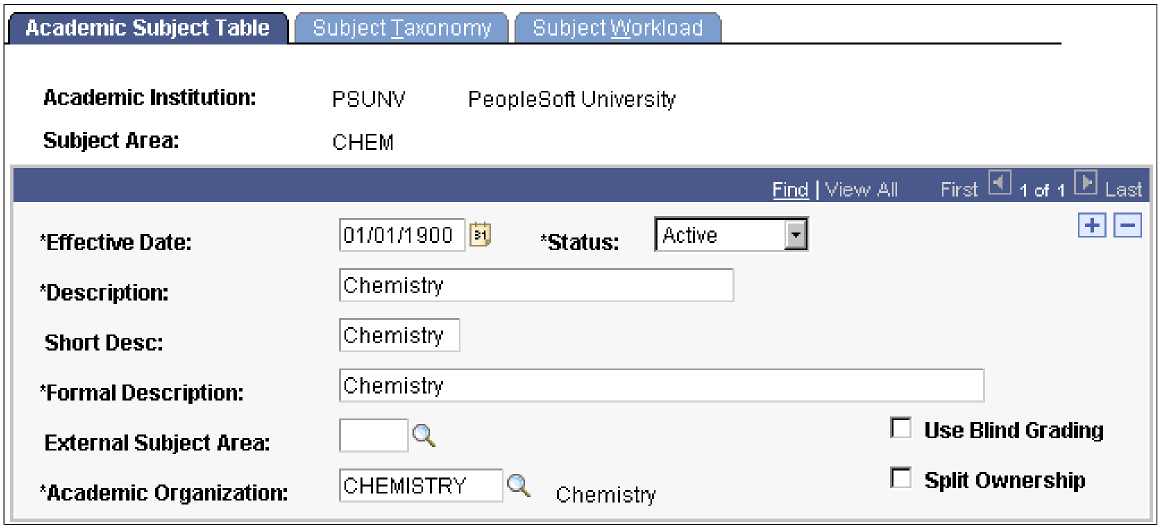
Pages Used to Define Subject Areas

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Subject Table	SUBJECT_TABLE	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Subject Table** > **Academic Subject Table**	Describe subject areas, modify existing subject area descriptions, link subject areas to academic organizations, and set other parameters, such as blind grading.
Subject Taxonomy	SUBJECT_TAXONOMY	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Subject Table** > **Subject Taxonomy**	Define subject area taxonomy by linking subject areas to CIP and HEGIS codes and to fields of study.
Subject Workload	SUBJ_WORKLD_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Subject Table** > **Subject Workload**	Define subject and component multipliers by the weight of each component within each subject area at the academic institution.

Describing Subject Areas

Access the Academic Subject Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Subject Table** > **Academic Subject Table**).

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

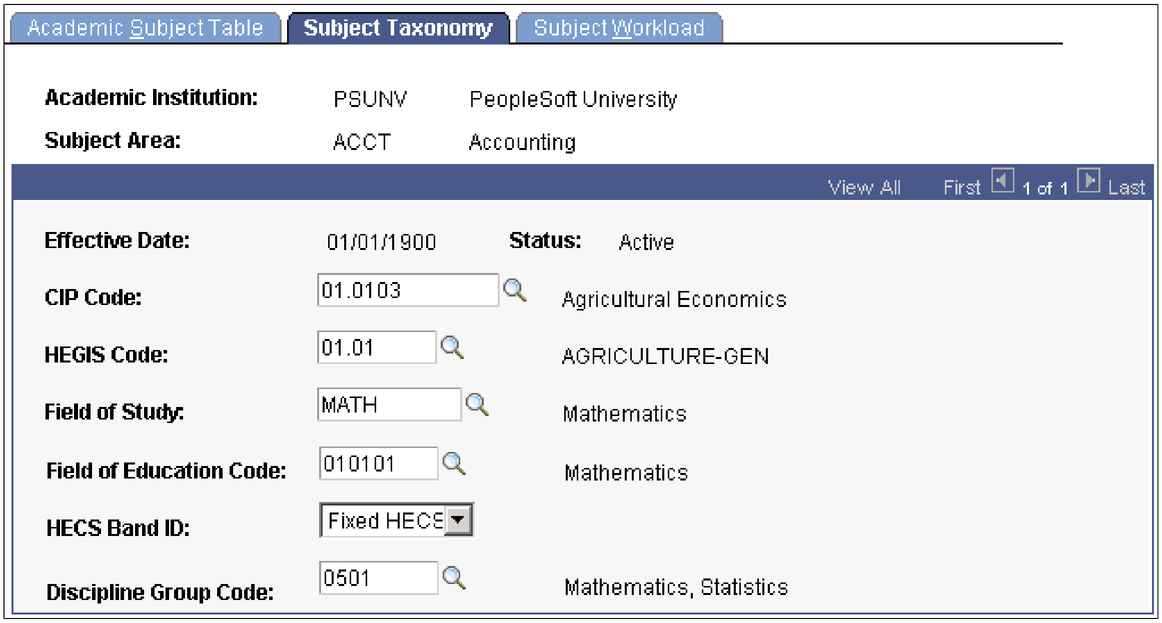


Field or Control	*Description*
External Subject Area	Currently not in use.
Academic Organization	Enter the academic organization that offers courses in this subject area. Any academic organization entered here should also have a detail node associated with it for this subject area on the academic organization tree.
Use Blind Grading	Select to indicate that blind grading be used for every course within this subject area. This selection is the default value and can be changed on a course-by-course basis on the Offerings page of the Course Catalog component. Blind grading enables you to create a grade roster with randomly generated numbers rather than student IDs.
Split Ownership	Select to designate multiple academic organization owners for this subject area. If you select this check box, the **Academic Organization** field and the **Percent Owned** field become available for edit.

Defining Subject Area Taxonomy

Access the Subject Taxonomy page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Subject Table** > **Subject Taxonomy**).

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



Field or Control	***Description***
CIP Code	Enter the CIP code for this subject area. CIP code. Values are delivered with the system as translate values. You can modify CIP codes on the CIP Code Table page.
HEGIS Code	Enter the HEGIS code for this subject area. HEGIS codes are delivered with the system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.
Field of Study	Enter a field of study for this subject area.
(AUS) Field of Education Code	Enter a code so that it is linked to the subject area. During DIISRTE reporting, this value is used in compiling statistics.
(AUS) HECS Band ID	This ID is used in Student Financials, but is defined in Student Records. Band IDs determine how much a student pays for a class. Select an ID to link it to a course. You can select the ID for a subject, course offering, or field of education. The ID identifies the HECS band which is used to determine the HECS contribution for a class.
(AUS) Discipline Group Code	Enter a code to group students for DIISRTE reporting. The code is assigned to the student by default during enrollment, but it can be overridden.

Defining Subject and Component Multipliers

Access the Subject Workload page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Subject Table** > **Subject Workload**).

Related Links

"Understanding Instructor Workload" (Student Records)

Defining Academic Shifts

This section discusses how to define academic shifts.

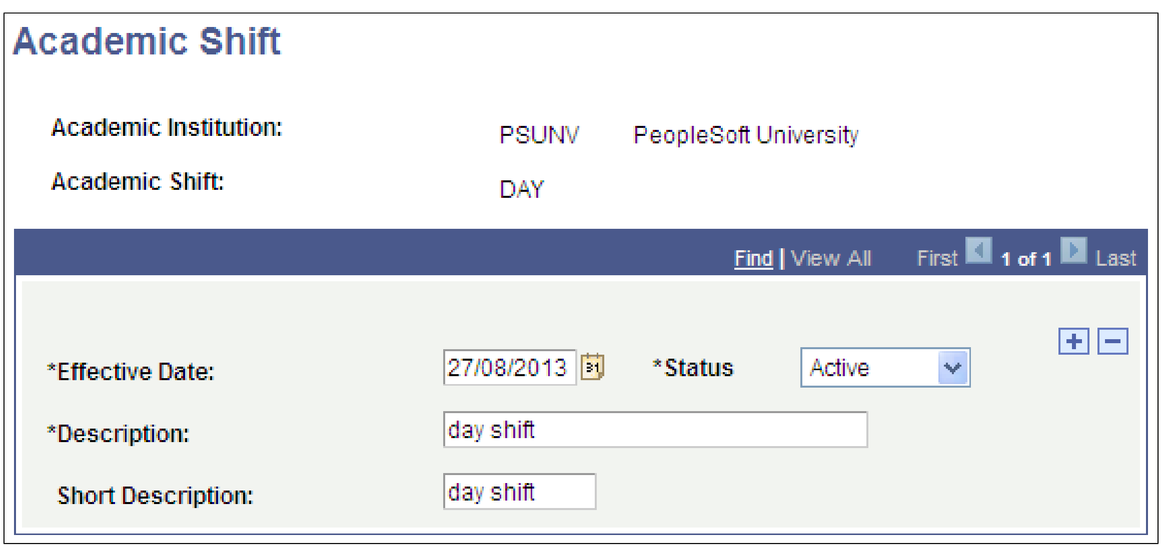
Page Used to Define Academic Shifts

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Shift	SSR_SHIFT_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Shift**	Define academic shifts.

Defining Academic Shifts

Access the Academic Shift page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Shift**).

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



The values that you define here are available in the Academic Shift field which appears (based on Academic Institution 3 setup) on various pages in Admissions and Student Records.

See "Entering Application Program Data" (Recruiting and Admissions)

See "Maintaining Student Program Stacks" (Student Records)

See Setting Academic Institution Defaults and Options

Map academic shifts to admit terms on the Academic Shift Mapping page.

See "Mapping Academic Shifts to Admit Terms" (Recruiting and Admissions)

Defining Academic Cohorts for Program Enrollment

Use the Academic Cohort Table (SSR_COHORT_TBL) component to define academic cohorts for Program Enrollment.

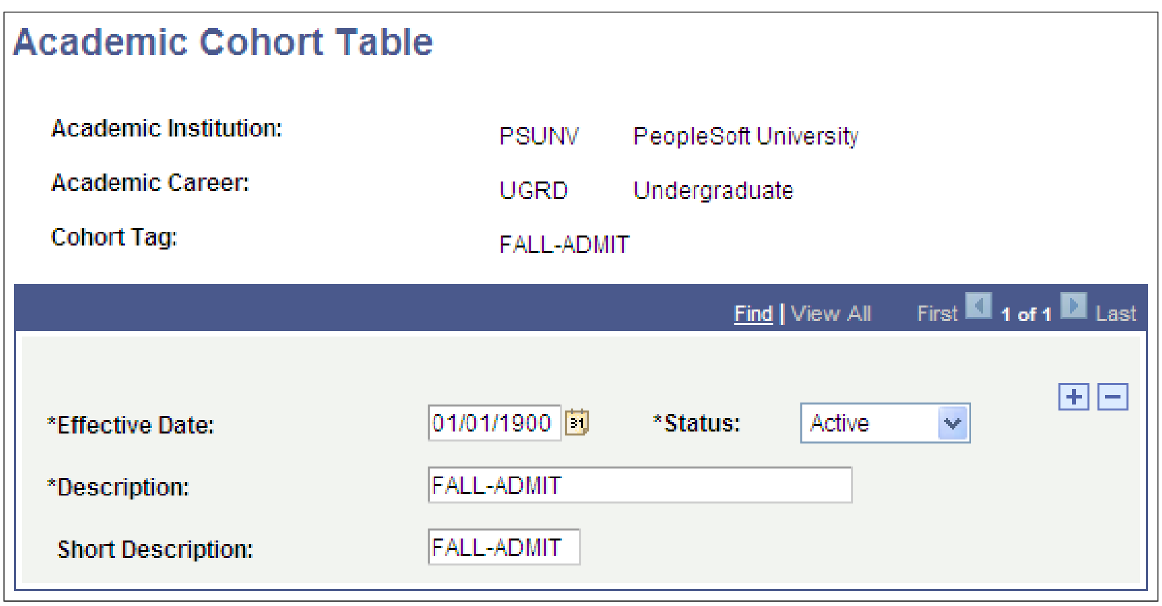
Page Used to Define Academic Cohorts

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Cohort Table	SSR_COHORT_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Cohort Table**	Define academic cohorts for program enrollment.

Defining Academic Cohorts

Access the Academic Cohort Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Cohort Table**).

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



The values that you define here are available in the Cohort Tag field which is used by Program Enrollment and appears on various Admissions and Student Records pages. The Cohort Tag can be used to assign an Enrollment Cohort to students in Program Enrollment.

See “Setting Up Enrollment Cohorts” (Student Records)

Related Links

“Adding New Applications Manually” (Recruiting and Admissions)

“Understanding Program Actions and Statuses” (Student Records)

(NLD) Defining Dutch Academic Structure

To set up Dutch academic structure, use these components: Cluster Code Table NLD (SSR_CLUST_CD_NLD), GBA Country Code Table (SSR_COUNTRY_NLD), MBO Code Table NLD (SSR_MBO_CD_NLD), BRINcode Table NLD (SCC_BRINCODE_NLD), SUB-BRINCODE Table (SCC_SUBBRIN_NLD), GBA Nationality Code Table (SSR_NATIONAL_NLD), and Prior Education Table NLD (SSR_PRE_EDU_NLD).

This section lists the pages used to define values that set up academic structures in the Netherlands.

Pages Used to Define Dutch Academic Structure

Page Name	***Definition Name***	***Navigation***	***Usage***
Cluster Codes Table	SSR_CLUSTER_CD_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **Cluster Code Table NLD** > **Cluster Codes Table**	Define cluster codes, which can be registered for Prior Education table entries. These codes provide a higher level of aggregation that combines multiple forms of education into one educational cluster. During the admissions process, entering a cluster detail code for a specific student prior to education entry can refine this aggregation.
GBA Country	SSR_COUNTRY_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **GBA Country Code Table** > **GBA Country**	Register GBA country codes, which are supplied by the Dutch Ministry of Internal Affairs. These codes are linked to the Country Code table.
MBO Code Table	SSR_MBO_CD_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **MBO Code Table NLD** > **MBO Code Table**	Define MBO codes, which are used to register for specific forms of education on the Dutch Education table.

Page Name	***Definition Name***	***Navigation***	***Usage***
BRINcode Table	SCC_BRINCODE_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **BRINcode Table NLD**	Define and maintain BRINcodes. The Dutch Ministry of Higher Education assigns BRINcodes to institutions and several interfaces such as Studielink and BRON use BRINcodes. Use BRINcodes to communicate with the Ministry. You can link BRINcodes to academic programs, campuses, and academic organizations.
SUB-BRINCODE Table	SCC_SUBBRIN_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **SubBrincode Table NLD**	Define and maintain Sub BRINcodes for each unique BRINcode location. A Sub BRINcode can be a location of your institution, location of a Prior Education School, or a location of an external organization certified for internship placements.
GBA Nationality	SSR_NATIONAL_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **GBA Nationality Code Table** > **GBA Nationality**	Register GBA nationality codes, which are supplied by the Dutch Ministry of Internal Affairs. Registration of a student's nationality is mandatory in the Netherlands. This official country code is necessary for use with BRON.
Prior Education Table	SSR_PRE_EDU_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **Prior Education Table NLD** > **Prior Education Table**	Define previous education codes, which are used to note a specific level of education attained by students. This information is relevant for the current admission to a specific academic program.

Defining BRINcodes

Access the BRINcode Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **BRINcode Table NLD**).

Field or Control	*Description*
Brin Type	Select *External* if you want to define a BRINcode for an external organization such as a Prior Education School or an Internship Organization. Select *Internal* if you want to map the BRINcode to an academic program.
External Org ID	This field appears when you select *External* in the **Brin Type** field. To add external organizations, select Campus Community, Organization, Create/Maintain Organizations, Organization Table.

See “Understanding Organizations” (Campus Community Fundamentals)

See “Creating Organization Records” (Campus Community Fundamentals)

Defining Sub BRINcodes

Access the SUB-BRINCODE Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure NLD** > **SubBrincode Table NLD)**).

Field or Control	*Description*
Location Nbr(location number)	This field appears for a BRINcode that has an External Brin Type. To add organization locations, select Campus Community, Organization, Create/Maintain Organization, Organization Locations.

Note: A Sub BRINcode can be alphanumeric.

See “Entering Organization Location Data” (Campus Community Fundamentals).

Chapter 10

Establishing Terms and Sessions

Defining Term Values

Terms, sessions, and academic calendars are time elements. As you define these elements, consider how they affect the business processes. For instance, they can affect class enrollment, financial aid, billing, tuition refunds, and statistical reporting.

To set up term values, use the Term Values Table component (TERM_VALUES_TABLE).

This section discusses how to set up term values and control their display in Self Service.

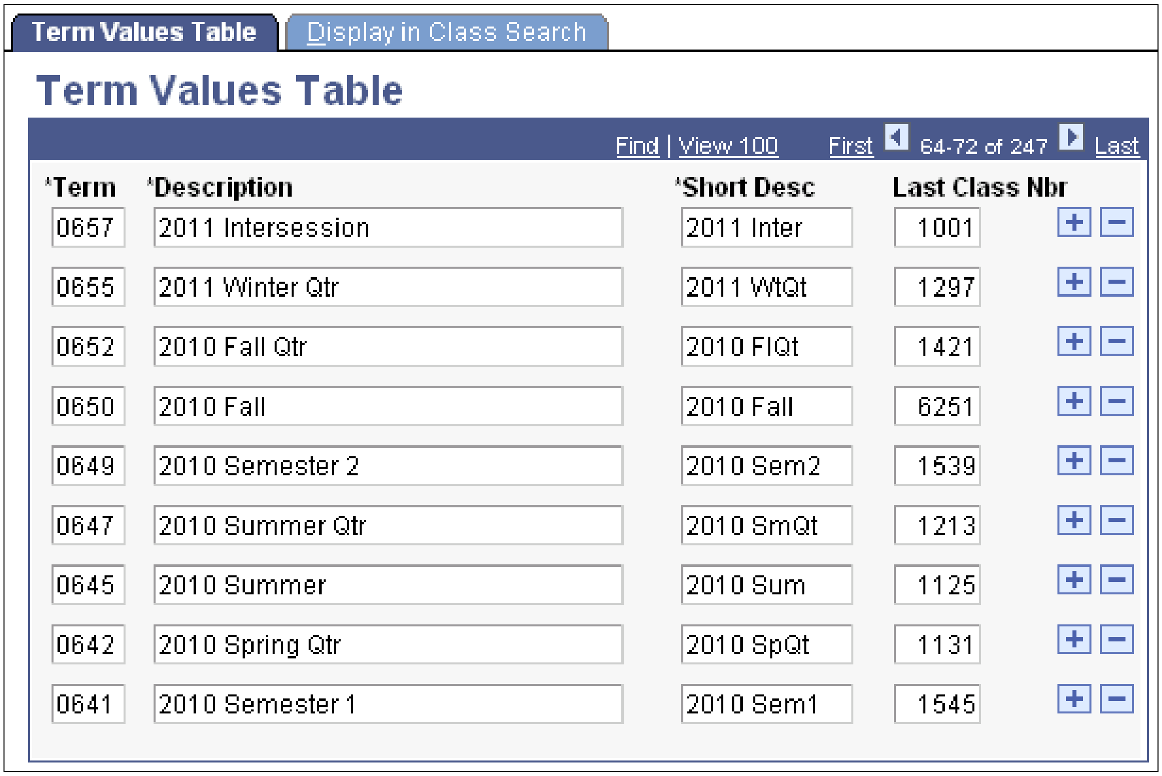
Pages Used to Define Term Values

Page Name	***Definition Name***	***Navigation***	***Usage***
Term Values Table	TERM_VALUES_TABLE	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term Values Table** > **Term Values Table**	Set up term values and their descriptions. You use these term values for all academic institutions and careers throughout Campus Solutions, regardless of the structure of the terms that you define.
Display Term in Class Search	TERM_VALUES_TBL2	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term Values Table** > **Display in Class Search**	Define dates to control the availability of terms on self-service pages, both for students and faculty.

Setting Up Term Values

Access the Term Values Table page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term Values Table** > **Term Values Table**).

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

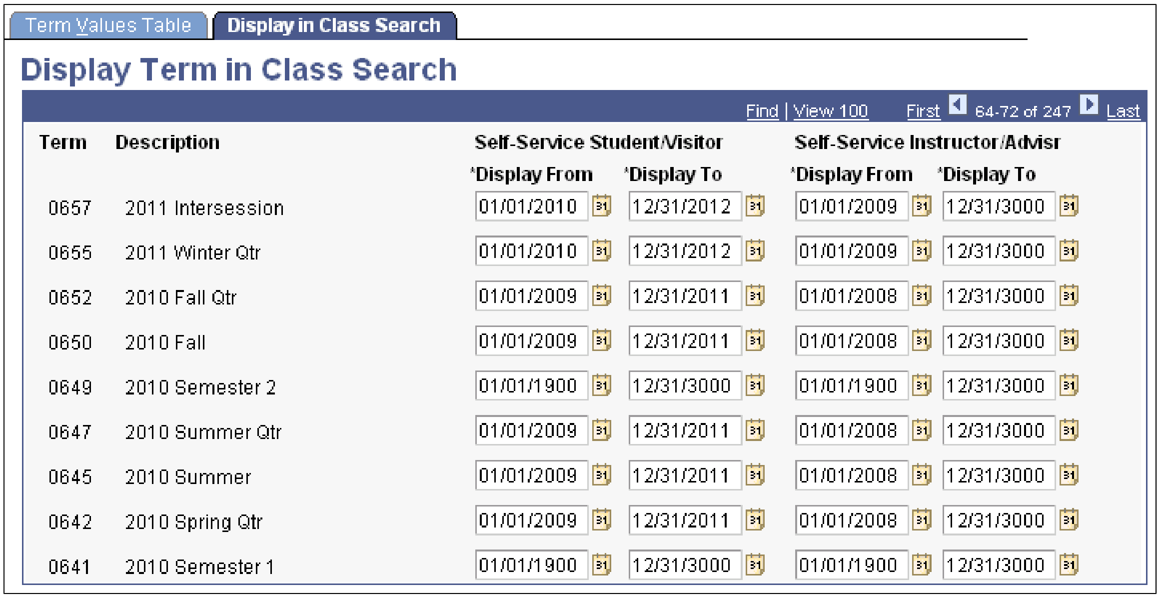


Field or Control	***Description***
Term	Enter the numeric code that uniquely identifies the term. You must define terms in sequential order so that you can correctly sort, report, and analyze term data. For example, the system accumulates statistics and evaluates degree progress by the sequence of terms. In addition, you should assign term values in increments of two or three so that you can insert additional terms, such as intersession or summer terms, later.
Last Class Nbr (last class number)	Enter the class number from which you want the class scheduling processes to begin assigning class numbers. When you schedule a new class through either the manual or term roll process, the process references this field for the term in which you are creating the class, and it assigns the class the *next* number. For example, if you have set this field to *1000* for term 0641, when you schedule a new class for term 0641, the class scheduling process assigns the class the number 1001 and updates the field value on this page to *1001*. The next new class that you schedule for term 0641 is number 1002. This process continues until you have assigned a number to all the classes. Use large number increments between subsequent terms to avoid having students mistakenly use a class number from the previous term to enroll in a class for the current term.

Setting Up Term Display in Class Search

Access the Display in Class Search page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term Values Table** > **Display in Class Search**).

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


Term Values Table | Display in Class Search

Display Term in Class Search

Find | View 100 First 64-72 of 247 Last

Term	Description	Self-Service Student/Visitor		Self-Service Instructor/Advisr	
		*Display From	*Display To	*Display From	*Display To
0657	2011 Intersession	01/01/2010	12/31/2012	01/01/2009	12/31/3000
0655	2011 Winter Qtr	01/01/2010	12/31/2012	01/01/2009	12/31/3000
0652	2010 Fall Qtr	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0650	2010 Fall	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0649	2010 Semester 2	01/01/1900	12/31/3000	01/01/1900	12/31/3000
0647	2010 Summer Qtr	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0645	2010 Summer	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0642	2010 Spring Qtr	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0641	2010 Semester 1	01/01/1900	12/31/3000	01/01/1900	12/31/3000

Enter the date range in which you want the term to appear in the self-service class search and browse course catalog options for students and visitors. You can define a separate date range for instructors and advisors. All terms appear within administrative pages.

Note: The SSR_CLASS (Class Search) web service is one of a number of delivered Enrollment Web Services. The service operation SSR_GET_CLASSES: Retrieve Classes validates the term value that is entered by a user (for example a student using a self service enrollment user interface) against the date range for the term for Self Service Student/Visitor on this page. An error message is sent if the term is not within the specified date range.

For detailed information about Enrollment Web Services:

See Enrollment Web Services Developers Guide and Enrollment Web Services Users Guide in My Oracle Support (ID 1371391.1).

Setting Up Time Periods

To set up time periods, use the Time Period Table component (TIME_PERIOD_TABLE).

This section discusses how to define time periods.

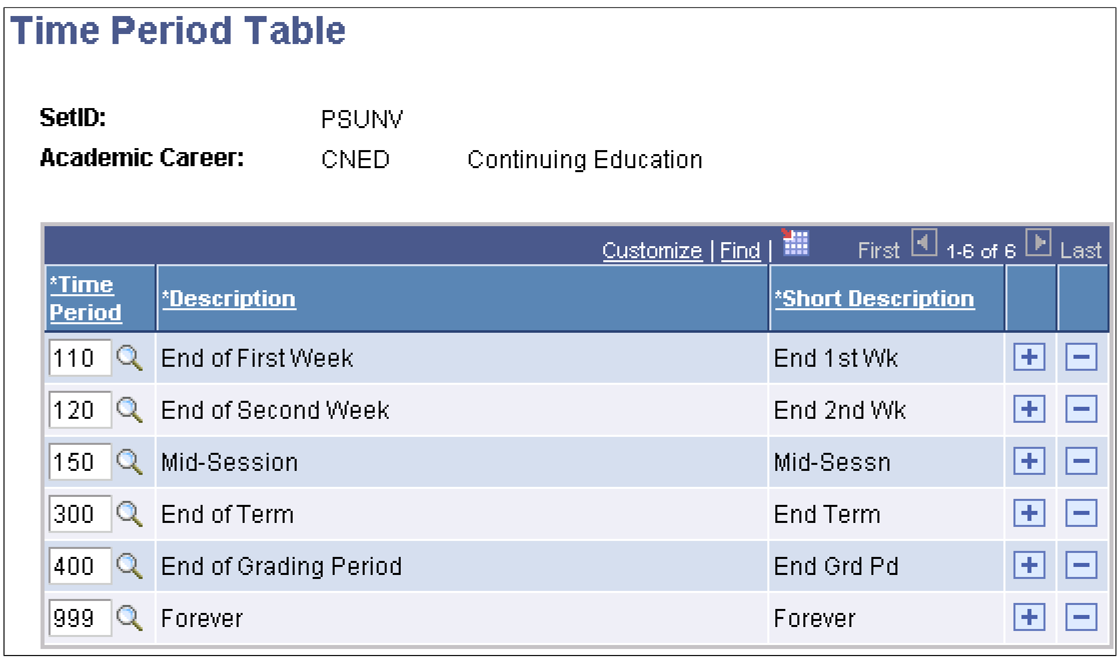
Page Used to Set Up Time Periods

Page Name	***Definition Name***	***Navigation***	***Usage***
Time Period Table	TIME_PERIOD_TABLE	**Set Up SACR** > **Product Related** > **Student Records** > **Enrollment** > **Time Period Table** > **Time Period Table**	Define the time periods, or critical points in time, that are valid for each academic career within a setID.

Defining Time Periods

Access the Time Period Table page (**Set Up SACR** > **Product Related** > **Student Records** > **Enrollment** > **Time Period Table** > **Time Period Table**).

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



Time periods identify landmark session dates (on the Session Time Period Table page), secure access to various enrollment functions by enrollment access ID (on the Enrollment Functions page), and define how enrollment action reasons relate to the dropping of classes (on the Enrollment Action Reason Table page).

Field or Control	***Description***
Time Period	Enter a time period that is valid for the academic career and setID. You can add more time period translate values, provided that you attach your own coding to them.
Description	This field is populated by the translate table when you enter a time period.

Field or Control	***Description***
Short Description	This field is populated by the translate table when you enter a time period.

Related Links

Understanding Student Records Security

Defining Enrollment Action Reasons

To set up enrollment action reasons, use the Enrollment Action Reason component (ENRL_RSN_TBL).

This section discusses how to define enrollment action reasons.

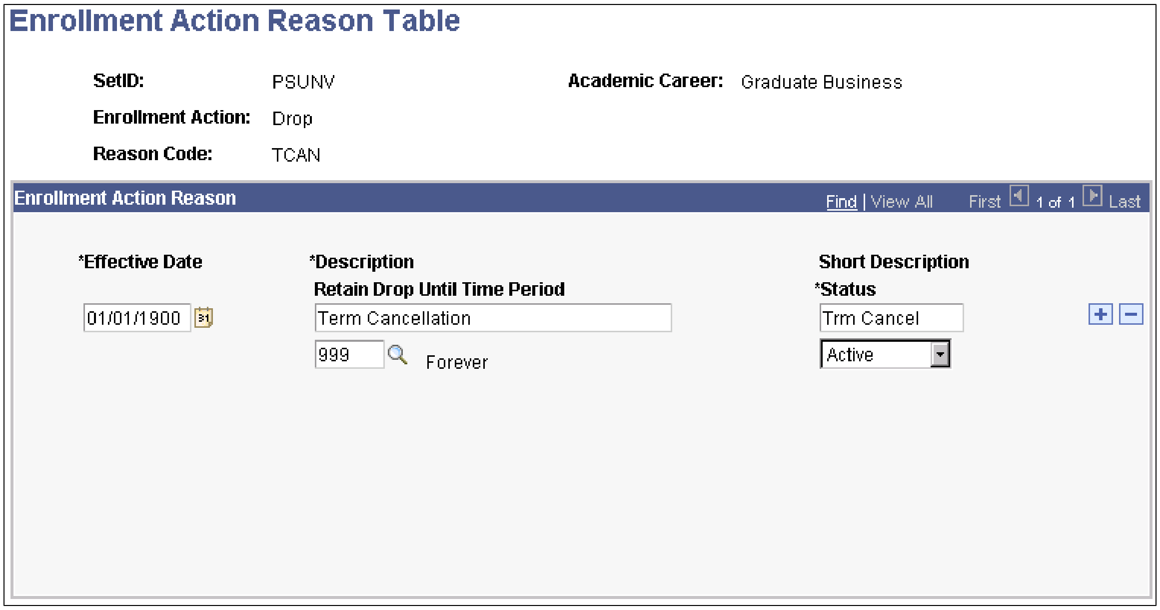
Page Used to Define Enrollment Action Reasons

Page Name	***Definition Name***	***Navigation***	***Usage***
Enrollment Action Reason Table	ENRL_RSN_TBL	**Set Up SACR** > **Product Related** > **Student Records** > **Enrollment** > **Enrollment Action Reason** > **Enrollment Action Reason Table**	Define enrollment action reasons to provide relevant information about class enrollment transactions.

Defining Enrollment Action Reasons

Access the Enrollment Action Reason Table page (**Set Up SACR** > **Product Related** > **Student Records** > **Enrollment** > **Enrollment Action Reason** > **Enrollment Action Reason Table**).

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



Enrollment action reasons are linked to enrollment actions such as *Add Grade, Drop,* and *Enroll.* Enrollment actions are delivered with the system as translate values. You can add enrollment actions to the translate table.

Field or Control	***Description***
Retain Drop Until Time Period	If the institution needs to retain student enrollment records during part of the drop delete period, you can associate time periods with enrollment action reasons that you define for enrollment drop actions. When you create an enrollment request with an enrollment drop action, you can then enter an enrollment action reason that has a time period associated with it. For requests during the drop delete period but before the end of the time period, the enrollment engine retains the affected student enrollment records. For requests during the drop delete period but after the time period, the enrollment engine deletes the affected student enrollment records.

Defining Terms, Sessions, and Session Time Periods

To set up terms, sessions, and session time periods, use the Term/Session Table component (TERM_TABLE).

Campus Solutions enables you to link defined terms to every academic career at an academic institution. This functionality enables you to structure different terms and sessions, depending on the academic career, to suit the needs of the institution.

This section discusses how to:

- Define terms.
- Define sessions.
- Define session time periods.

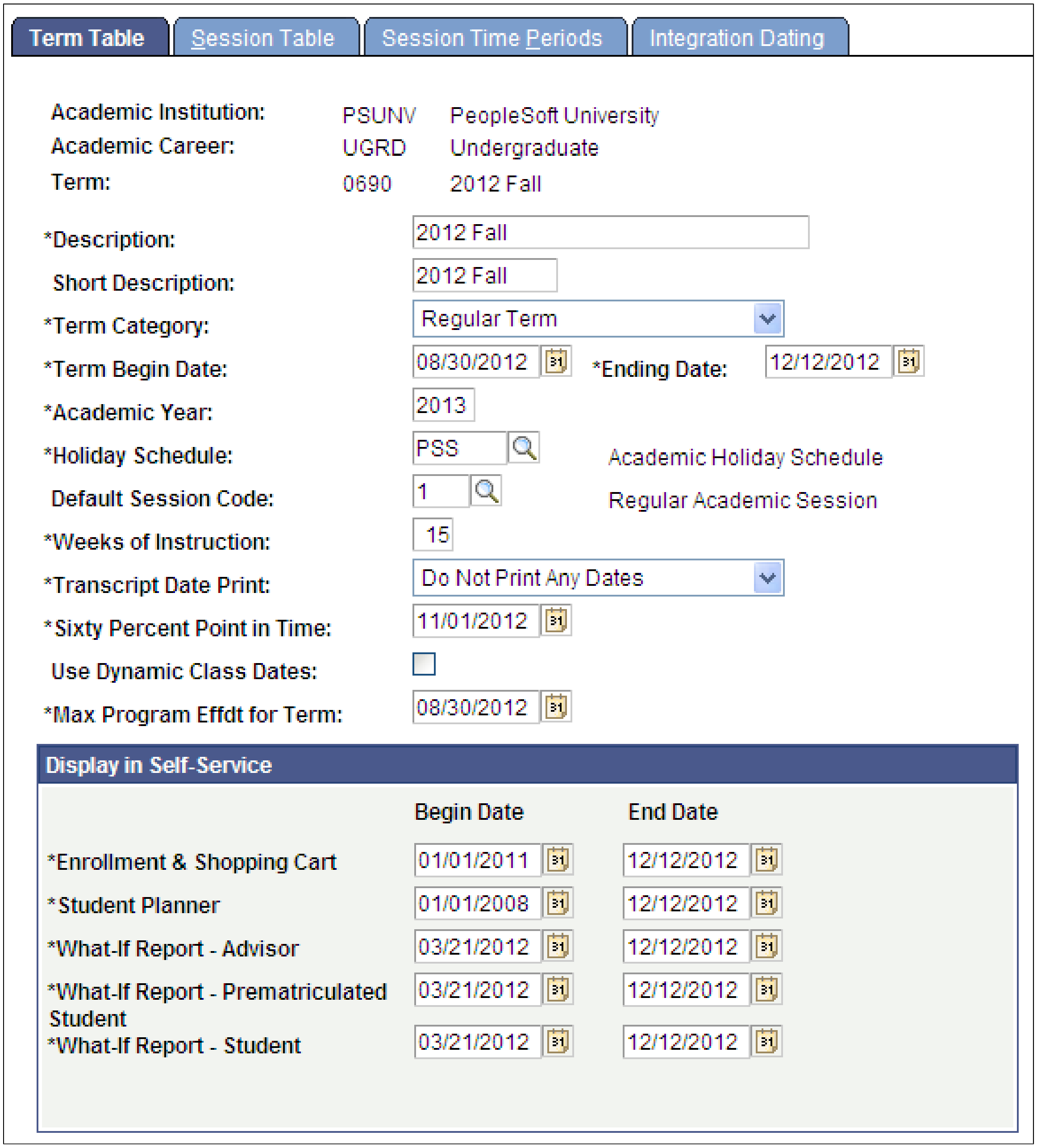
Pages Used to Define Terms, Sessions, and Session Time Periods

Page Name	***Definition Name***	***Navigation***	***Usage***
Term Table	TERM_TABLE	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term/Session Table** > **Term Table**	Define terms within academic careers. Different academic careers at an institution can have different term structures.
Session Table	SESSION_TABLE	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term/Session Table** > **Session Table**	Define the sessions of a term, including the significant dates within the session. Sessions subdivide a term into multiple time periods in which to offer classes.
Session Time Periods	SESS_TIME_PERIODS	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term/Session Table** > **Session Time Periods**	Define landmark time periods within each session of a term. The system uses time periods for enrollment security purposes.

Defining Terms

Access the Term Table page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term/Session Table** > **Term Table**).

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



A term is an administrative time period within which sessions are defined, students are billed, and statistics are accumulated for individual students and the entire academic institution.

Field or Control	***Description***
Term Category	Select the category that best describes the term. You can modify these translate values.

Field or Control	***Description***
Term Begin Date and **Ending Date**	Enter the first and last official dates of the term. The system uses the term begin date as the effective date of the term. The term begin and end dates are important because they determine, for example, the courses that are available for the term and the status of a student's academic program and academic plan. These dates are referenced throughout the system.
Academic Year	Enter the academic year to which the term belongs. For example, *2004* indicates that the term belongs to the 2004–2005 academic year. You must associate each term with an academic year for reporting and financial aid accumulation purposes. However, you can modify the financial aid academic year for individual students.
Holiday Schedule	Enter the holiday schedule for the term. Define holiday schedule values on the Holiday Schedule page. See “Setting Up Holiday Schedules” (Campus Community Fundamentals)
Default Session Code	Enter the default session code. This value is used throughout the system to supply the session code associated with the term, although the value can be overridden. The default serves as a data entry aid.
Weeks of Instruction	Enter the standard number of weeks of instruction for classes offered in the term. The Instructor Workload feature in Student Records uses this value when calculating faculty workload. Financial Aid uses this value when building terms and projections.
Transcript Date Print	Select the dates to print on student transcripts for this academic career and term combination. The value of this field appears by default, based on the corresponding field value from the SA Options (student administration options) page of the Installation Table component. Any modification to these translate values requires substantial programming. Values are: *Do Not Print Any Dates:* No dates are printed on student transcripts. *Print Class Dates:* To print class dates on student transcripts for the specified transcript type, select this value and the **Print Class Dates** check box on the Enrollment/Statistics page of the Define Transcript Type component. *Print Session Dates:* Select to print session dates on student transcripts. *Print Term Dates:* Select to print term dates on student transcripts.

Field or Control	***Description***
Sixty Percent Point in Time	Enter the date on which the term is 60 percent complete. The system uses this date when computing refunds for students. In the U.S., most academic institutions stop issuing refunds at this point.
Use Dynamic Class Dates	Select to enable the Dynamic Class Dates feature for all sessions scheduled in this term. The system migrates the value of this check box to the corresponding field on the Session Table page, where you can override the selection for a specific session.
Max Program Effdt for Term (maximum program effective date for term)	Enter the date to be used as the deadline for term activation in a given term. The date appears by default from the Academic Career Table page. The deadline can be modified on the Term Table, but must be equal to or after the term start and before the Term end date.

Display in Self-Service

Define dates in this group box to control the availability of self-service enrollment and My Planner features by term.

Field or Control	***Description***
Enrollment & Shopping Cart	Enter a range of dates to control the availability of this term in the **Select Term** field on student self-service enrollment and shopping cart pages. The student self-service Class Search & Browse Course Catalog also uses the date range to determine if the **Select** button should appear, which allows the student to add the class to their shopping cart. **Note:** The SSR_ENROLLMENT web service is one of a number of delivered Enrollment Web Services. The service operation SSR_GET_ENROLLMENT supports the retrieval of the StudyList details for an enrolled student. The service validates the term value that is entered by a user (for example a student using a self service enrollment user interface) against the date range for the term in the **Enrollment & Shopping Cart** field. An error message is sent if the term is not within the specified date range. For detailed information about Enrollment Web Services: See Enrollment Web Services Developers Guide and Enrollment Web Services Users Guide in My Oracle Support (ID 1371391.1).

Field or Control	***Description***
Student Planner	Enter a range of dates to control the availability of this term for use on the student self-service My Planner.
What-If Report – Advisor	If you want to enable advisors to generate what-if advisement reports for students or prospective students using the What-If Report – Create What-if Scenario self-service (SAA_SS_WHATIF) page, enter the begin and end dates. The range of dates that you enter controls the availability of the term value in the Catalog Year field on the What-If Report – Create What-if Scenario page. This is the page that advisors use to define a what-if scenario for students. The What-If Report – Advisor field is mandatory. If you do not want to use the feature of advisors generating what-if reports in self-service, Oracle recommends that you enter dates in the past.
What-If Report – Prematriculated Student	If you want to enable prospective students to generate what-if advisement reports using the What-If Report – Create What-if Scenario self-service page, enter the begin and end dates. The range of dates that you enter controls the availability of the term value in the Catalog Year field on the What-If Report – Create What-if Scenario page for those users. The What-If Report – Prematriculated Student field is mandatory. If you do not want to use the feature of prematriculated students generating what-if reports in self-service, Oracle recommends that you enter dates in the past.

Field or Control	***Description***
What-If Report – Student	If you want to enable active students to generate what-if advisement reports using the What-If Report – Create What-if Scenario self-service page, you have two options: One option is to use only the student's career requirement term so that the student cannot change the Catalog Year field value on the What-If Report – Create What-if Scenario page. You can observe this default setting by accessing the Academic Advising Setup page and verifying that the value in the Student What-If Career Requirement Term field is *Use Career Reqmnt Term Only*. If you prefer to give students the option of selecting a term value in the Catalog Year field, your other option is to select the *Use Term Table Setup* value in the Student What-If Career Requirement Term field on the Academic Advising Setup page. Then, use the What-If Report – Student field on the Term Table page to enter the valid begin and end dates. The range of dates that you enter controls the availability of the term in the Catalog Year field on the What-If Report – Create What-if Scenario page. The What-If Report – Student field is mandatory. If you do not want the Catalog Year field to obey the term begin and end dates, enter begin and end dates that are in the past.

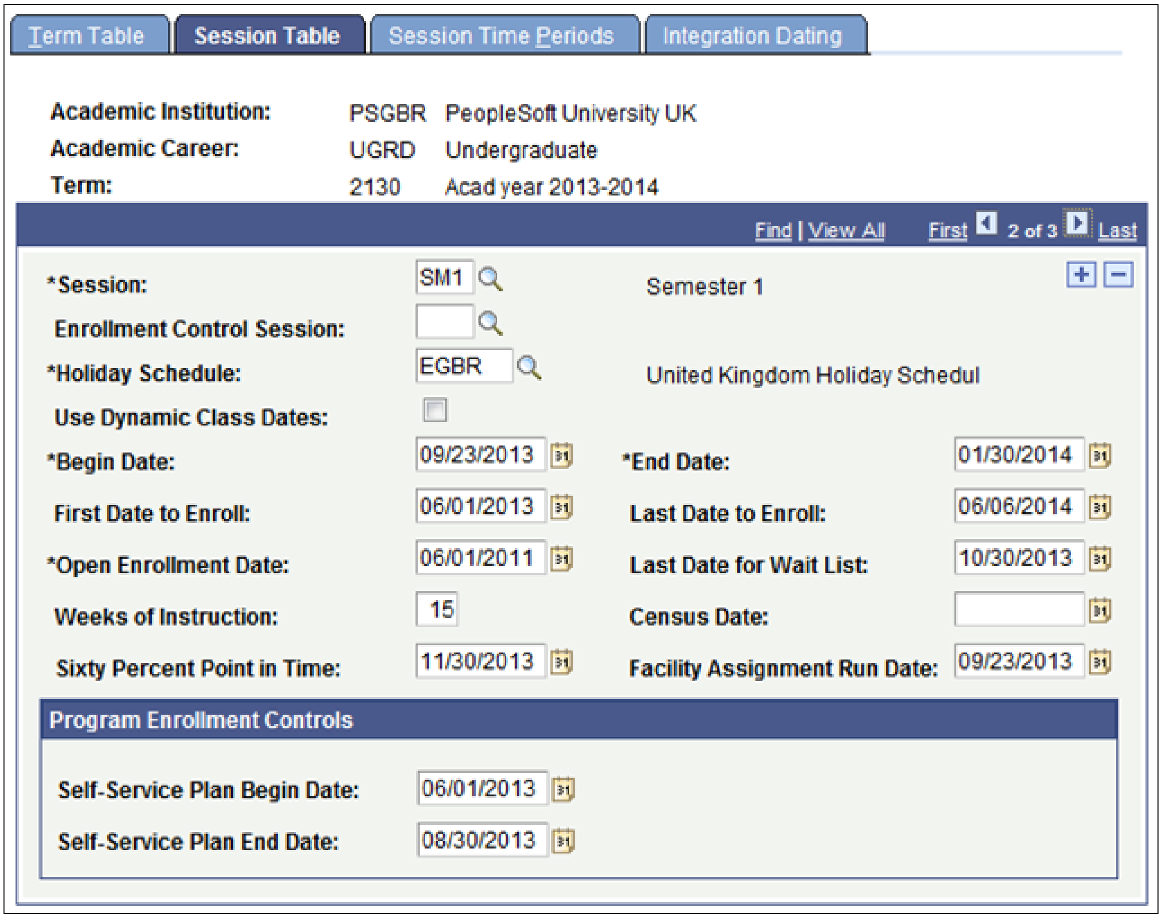
Related Links

"Setting Up Self-Service Features for Academic Advisement" (Campus Self Service)
Understanding Academic Calendars
"Understanding Refunds" (Student Financials)

Defining Sessions

Access the Session Table page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term/Session Table** > **Session Table**).

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



Important! After the open enrollment period of the academic institution begins, the system holds the student to the enrollment limits for the session rather than the enrollment limits for the appointment. The enrollment limit for a session is defined on the Academic Program Table page; the appointment limit is defined on the Appointment Limits Table page in the Term/Session Table component.

Field or Control	***Description***
Session	Enter the type of session that you are defining for the term. To schedule open entry/exit (OEE) class sections for a course within the specified academic institution, academic career, and term combination, you must define one OEE session per combination. The system restricts the scheduling of classes within an OEE session to only the courses available in OEE format, as defined on the Offerings page of the Course Catalog component. When you define an OEE session, the system automatically selects the **Use Dynamic Class Dates** check box and makes it unavailable, because the calculation of dynamic class data for an OEE class section requires the use of the Dynamic Class Dates feature. The system also makes several date fields unavailable because the dates do not apply to OEE class sections. You can modify these translate values and their descriptions, with the exception of *OEE,* for which you can modify the descriptions only. Any modification to this code requires substantial programming.
Enrollment Control Session	Enter an enrollment control session to limit to a single session's enrollment limit the number of units that a student can take for all sessions within a term. For example, suppose that the following three sessions and corresponding enrollment unit limits exist for the fall term: a regular session with an 18-unit limit, a 12-week session with a 6-unit limit, and a 6-week session with a 3-unit limit. To limit the total number of units that a student can take in all three sessions to 18 units, make the regular session the enrollment control session. This limits the student to a maximum of 18 units in the fall term—regardless of the session in which the student registers for courses. The system still enforces enrollment limits for individual sessions. In this example, a student can take a maximum of only 6 units for the 12-week session and 3 units for the 6-week session. However, if a student takes the maximum units for the 12-week and 6-week sessions, the system limits the student to 9 units in the regular session because the student cannot exceed 18 units for all three sessions.
Holiday Schedule	Enter the holiday schedule for the session. Define holiday schedule values on the Holiday Schedule page. See “Setting Up Holiday Schedules” (Campus Community Fundamentals)
Use Dynamic Class Dates	Select to enable the Dynamic Class Dates feature for all classes scheduled within the session.

Field or Control	*Description*
Begin Date and **End Date**	Enter the default begin and end date for classes offered in the session. When you define class sections, the system migrates the session begin and end dates to the class start and end dates on the Basic Data page of the Schedule New Course component. You can override these dates for the class section. ***Warning!*** The system does not validate against term begin and end dates. Session begin and end dates can extend beyond the boundaries of the begin and end dates of the term.
First Date to Enroll and **Last Date to Enroll**	Enter the first and last dates on which students can enroll in classes for the specified session. The enrollment engine prevents students from enrolling in classes before the date that you specify. This field is required for OEE sessions but optional for all other sessions. The first date to enroll must be on or before the start date of the first enrollment appointment within the session. The last date to enroll must be on or after the end date of the last enrollment appointment within the session.
Open Enrollment Date	Enter the date on which students can perform enrollment functions in the session, term, and academic career combination without having an enrollment appointment. The open enrollment date is tied to the academic career of the course as defined in the Course Catalog component. For example, if the academic career, term, and session combination is graduate, fall, and regular, then the open enrollment date affects the courses defined under the graduate career in the course catalog for this session.
Last Date for Wait List	Enter the final date on which a student can be placed on a wait list for the session. The enrollment engine assigns a student to the wait list for a class if the class is full and the user selects the **Wait List Okay** check box for the enrollment request.
Weeks of Instruction	Enter the standard number of weeks of instruction for classes offered in the session. The Instructor Workload feature in Student Records uses this value when calculating faculty workload. Financial Aid uses this value when building terms and projections.
Census Date	Enter the cutoff date for census statistics for the session. This field is for informational purposes only.
Sixty Percent Point in Time	Enter the date on which you consider the session to be 60 percent complete. The system uses this date when computing refunds. In the U.S., most academic institutions stop issuing refunds at this point.

Field or Control	*Description*
Facility Assignment Run Date	Enter the run date of the facility assignment if you are using the Universal Algorithm Schedule25 and Resource25 software to assign facilities to classes. This assists you in assigning facilities during class scheduling.

Program Enrollment Controls

These fields are referenced only if the student's program has a program format which includes session.

Field or Control	*Description*
Self-Service Plan Begin Date	Enter the date on which the My Education Plan component becomes available for students to plan.
Self-Service Plan End Date	When this date is reached, the session is display only.

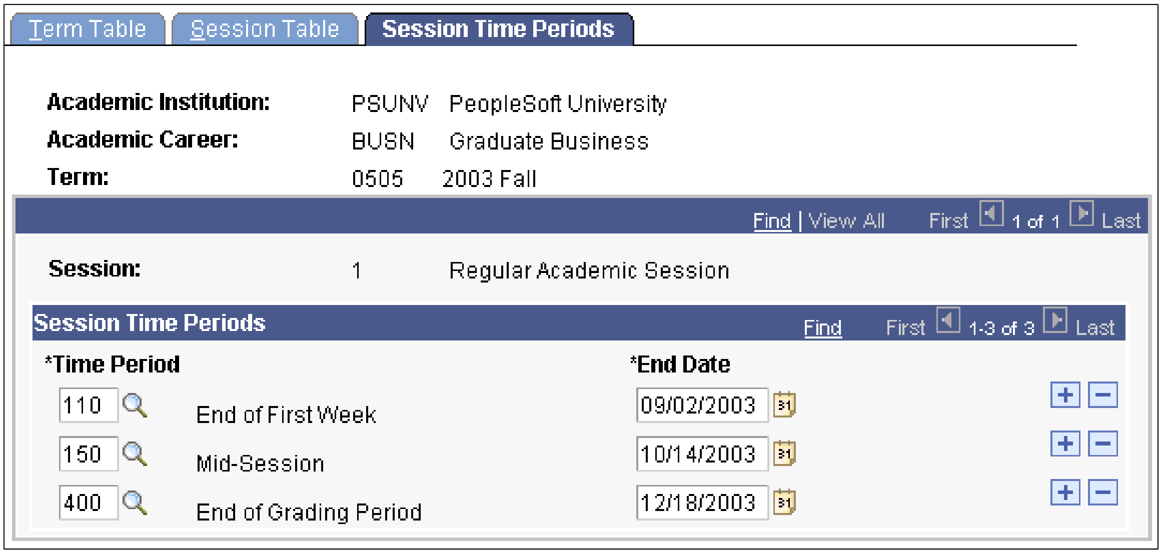
Related Links

“Setting Up Program Formats” (Student Records)
“Using Program Enrollment Self-Service Features” (Campus Self Service)
Understanding Academic Calendars
“Understanding Refunds” (Student Financials)

Defining Session Time Periods

Access the Session Time Periods page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Term/ Session Table** > **Session Time Periods**).

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



Important! If you do not enter any time periods on this page and the enrollment functions security points to specific time periods, then the system denies access to enrollment functions.

Session Time Periods

Field or Control	***Description***
Time Period	The system uses time periods for enrollment security to secure access to various enrollment functions. Enter a time period to enforce deadlines for performing enrollment access functions. For example, at PSUNV, the enroll-function deadline for the advisors enrollment access ID *(ADV)* is set time period *110,* so that advisors can enroll students in classes through the first week of classes. To enforce this deadline for fall 2003 undergraduate enrollment in the regular session, PSUNV defines time period 110 in this field and enters in the **End Date** field a date equal to the end of the first week of the regular session.
End Date	Enter the date on which the time period ends for the session. Only one time period in the session is active at a time.

Many of the dates required affect more than one area of Campus Solutions, such as withdrawal dates. Keep in mind that the Student Financials, Financial Aid, and Student Records applications all must use dates that match the dates set here.

Related Links

Setting Up Enrollment Access IDs

Chapter 11

Defining Traditional Academic Calendars

Understanding Academic Calendars

Academic calendars are systems by which you define the landmark dates that drive much of the day-to-day business at the academic institution. Each academic calendar contains cancel, withdrawal, and drop deadlines along with other landmark dates that vary, depending on the academic calendar type. As you define academic calendars, it is important to consider how the dates in these calendars affect all of the business processes (such as class enrollment, tuition refunds, and statistical reporting). All applications in Campus Solutions use the academic calendar dates in many of their business processes.

Campus Solutions enables you to create two types of academic calendars. The type that you create depends on the academic structure and business needs of the academic institution. For a traditional approach, you can create academic calendars with static landmark dates based on the term and session structure. For a flexible approach, you can create academic calendars with which you dynamically calculate landmark dates for individual classes *or* students.

A traditional academic calendar is based solely on term and session structure. For each academic career at the academic institution, you must define at least one academic calendar. Thus, you can potentially have as many academic calendars as you have academic careers. For each academic calendar, you must define the cancel, withdrawal, and drop deadlines for each session within each term of an academic career. Because each academic career within an academic institution has its own academic calendar, you can define different landmark dates for each academic career. To associate a traditional academic calendar with a student, you must activate the student into a term within the student's academic career, which in turn ties the appropriate academic calendar to the student. Thus, the dates on the academic calendar for that academic career and term combination drive the student's academic program. Academic calendars are a prerequisite to term activation. You use the Academic Calendar component to define traditional academic calendars, based on the term and session structure.

Note: If you use dynamic academic calendars, you must still set up traditional academic calendars for academic career and term combinations to activate students into terms and to enter landmark dates that dynamic academic calendars do not define.

Understanding Enrollment Request Processing for Drops

When processing enrollment requests with an enrollment action of drop through the Quick Enroll, Enrollment Request, and Block Enroll components or through self-service, the enrollment engine must determine the drop deadlines, reasons, grading bases, and grades with which to update the impacted student enrollment records (STDNT_ENRL).

The enrollment engine determines drop deadlines, grading bases, and grades differently depending on the class enrollment type (traditional, dynamic date, open entry/exit).

When requesting to drop a *traditional class enrollment,* the enrollment engine:

- Determines the deadlines according to the values set on the Academic Calendar 2 page.
- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

  If no grade is set on that page, then the enrollment engine uses the grading schemes and grades set on the Session Calendar 2 page.

When requesting to drop a *dynamic date class enrollment,* the enrollment engine:

- Determines the deadlines according to the values that the Dynamic Class Dates COBOL/SQL process (SRDYNADT and SRPCDYNP) calculates and displays on the Dynamic Class Data page.

  If you have not calculated the academic calendar dates for the class, the enrollment engine determines the deadlines according to the values set on the Academic Calendar 2 page.
- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

  If no grade is set on that page and you have calculated the academic calendar dates for this class, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If no grading scheme and grade are set on that page, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

  If no grade is set on that page and you have *not* calculated the academic calendar dates for this class, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

When requesting to drop an *OEE class enrollment,* the enrollment engine:

- Determines the deadline, according to the values that it calculates upon enrollment, and displays it on the Student Enroll OEE page.

  If the deadlines have not been calculated, the request fails.
- Determines, if applicable, the grading scheme and grade according to the value set on the Grading Scheme Table page.

  If no grade is set on that page, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If no grading scheme and grade are set on that page, the request fails.

Regardless of the class enrollment type, the enrollment engine determines the reason according to the enrollment action reason that you enter on the enrollment processing page. If you do not enter a value on the enrollment processing page, then, for drop transactions during the drop retain record period only, the enrollment engine uses the reason set on the Session Calendar 2 page. Otherwise, the engine assigns no reason.

If the institution wants to retain student enrollment records during the drop delete period, you can associate time periods to enrollment action reasons on the Enrollment Action Reason Table page. When you create an enrollment request with an enrollment action of drop, you can then select an enrollment action reason that has a time period associated with it. For these requests to drop that are during the drop delete period, the enrollment engine retains the impacted student enrollment records so long as the time period has not passed.

Note: The enrollment engine does not prevent enrollment request transactions after the drop deadlines. If you submit a request to drop after the latest drop deadline, the enrollment engine displays a message that the latest drop deadline has passed and continues with the processing.

Defining Traditional Academic Calendars

To set up traditional academic calendars, use the Academic Calendar component (ACAD_CALENDAR_TBL). Use the SSR_ACAD_CALENDAR_TBL component interface to load the data into the table for this component interface.

This section discusses how to:

- Describe academic calendars.
- Set up term landmark dates.
- Define self-service graduation terms.
- Set up session cancellation and withdrawal dates.
- Set up session drop dates.

Pages Used to Define Traditional Academic Calendars

Page Name	***Definition Name***	***Navigation***	***Usage***
Term Calendar 1	ACAD_TERM_CAL1	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Term Calendar 1**	Describe academic calendars for an academic career.
Term Calendar 2	ACAD_TERM_CAL2	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Term Calendar 2**	Dates on this page are informational only and are not required. When you perform a term withdrawal or cancellation, the Stud Records Term Withdrawal COBOL/ SQL process (SRPCWDPR) uses dates defined for the session, not the term.
Term Calendar 3	ACAD_TERM_CAL3	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Term Calendar 3**	Set up term landmark dates for students who are active in the specified term for the specified academic career. These landmark dates are for class enrollment, graduation, statistical reporting, and transcript purposes.

Page Name	*Definition Name*	*Navigation*	*Usage*
Term Calendar 4	ACAD_TERM_CAL4	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Term Calendar 4**	Define valid graduation application dates for each term. The system uses the date range to control the values that students can enter in the Expected Graduation Term field on the Apply for Graduation – enter Graduation Term page.
Session Calendar1	ACAD_SESN_CAL2_TBL	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Session Calendar 1**	Set up the class cancellation and withdrawal deadlines and data that the Stud Records Term Withdrawal process uses when a student cancels or withdraws from a term or session within a specified academic career.
Session Calendar2	ACAD_SESSN_CAL_TBL	**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Session Calendar 2**	Set up the session drop deadlines that the enrollment engine uses when a student drops a class within a particular session of an academic career.

Describing Academic Calendars

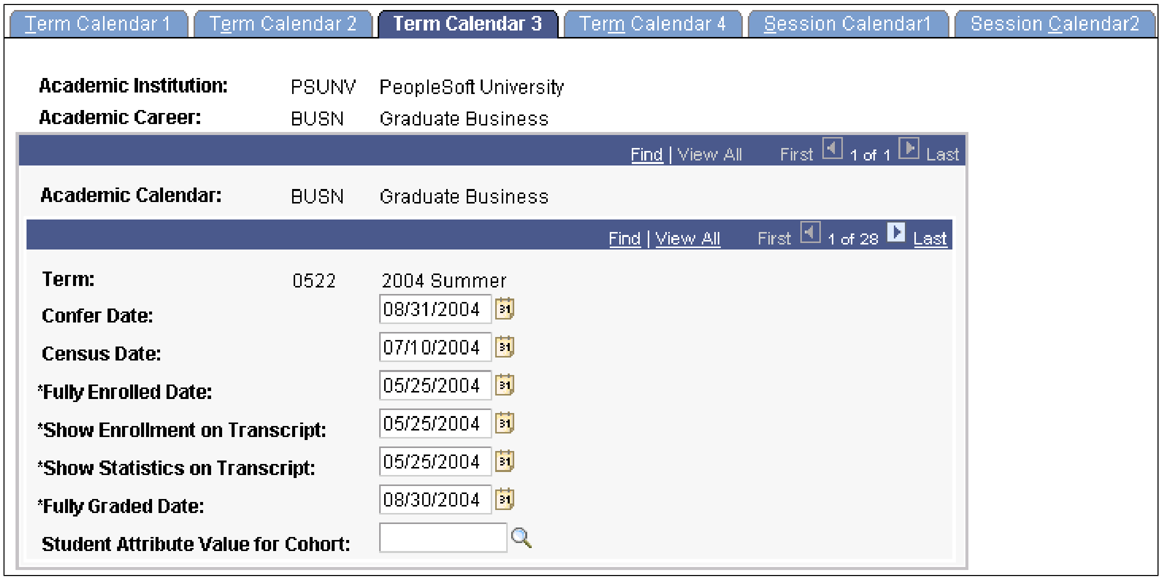
Access the Term Calendar 1 page (**(Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Term Calendar 1**).

Field or Control	*Description*
Academic Calendar	Enter a code that represents this academic calendar. If you have multiple academic careers that use the same academic calendar, set up the academic calendar for each of those academic careers, entering the same academic calendar code for each academic career.

Setting Up Term Landmark Dates

Access the Term Calendar 3 page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Term Calendar 3**).

This example illustrates the fields and controls on the Term Calendar 3 page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Confer Date	Enter the degree conferral date that the system uses for students who are active in the specified term for the specified academic career and are graduating at the end of the specified term. The system uses this date when you post degrees.
Census Date	Enter the official cutoff date for census statistics for the term.
Fully Enrolled Date	Enter the date on which the students who are active in the specified term for the specified academic career are considered fully enrolled in the specified term. As of this date, the students' coursework appears on their transcripts when you enter the **Obey Enrollment on Transcript Date** check box on the Enrollment/Statistics page of the Define Transcript Type component. This date is also used for financial aid load calculations and billing purposes.
Show Enrollment on Transcript	Enter the date on which the in-progress enrollment appears on transcripts for students who are active in the specified term for the specified academic career. When you define transcript types, you can indicate on the Define Transcript Type – Basic Data page whether the transcript processes should obey this date and display in-progress enrollment information.
Show Statistics on Transcript	Enter the date on which academic statistics appear on transcripts for students who are active in the specified term for the specified academic career. When you define transcript types, you can indicate on the Define Transcript Type - Basic Data page whether the transcript processes should obey this date and display term statistics.

Field or Control	Description
Fully Graded Date	Enter the date on which the system considers a student fully graded. The student must be active in the specified term for the specified academic career. The system populates this value by default for students on the Term Control Dates page in the Term Activation component. In addition, the system populates this value by default to the STDNT_CAR_TERM record when you run the Term Activation process or the Term Activation Update SQR process (SRTRMAC). When you define transcript types, you can indicate on the Define Transcript Type - Enrollment Statistics page whether the transcript processes should obey this date and only display classes considered fully graded. In other words, the system prints only those classes with fully graded dates less than or equal to the run date.
Student Attribute Value for Cohort	Currently not in use.

Defining Self-Service Graduation Terms

Access the Term Calendar 4 page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Term Calendar 4**).

Field or Control	Description
Allow Self-Service Update Until	This date is used in fluid apply for graduation to control whether students are allowed to update applications they've submitted. If the system date is earlier than the date specified in this field, the student can still update their application. Otherwise, the application becomes read-only.

Related Links

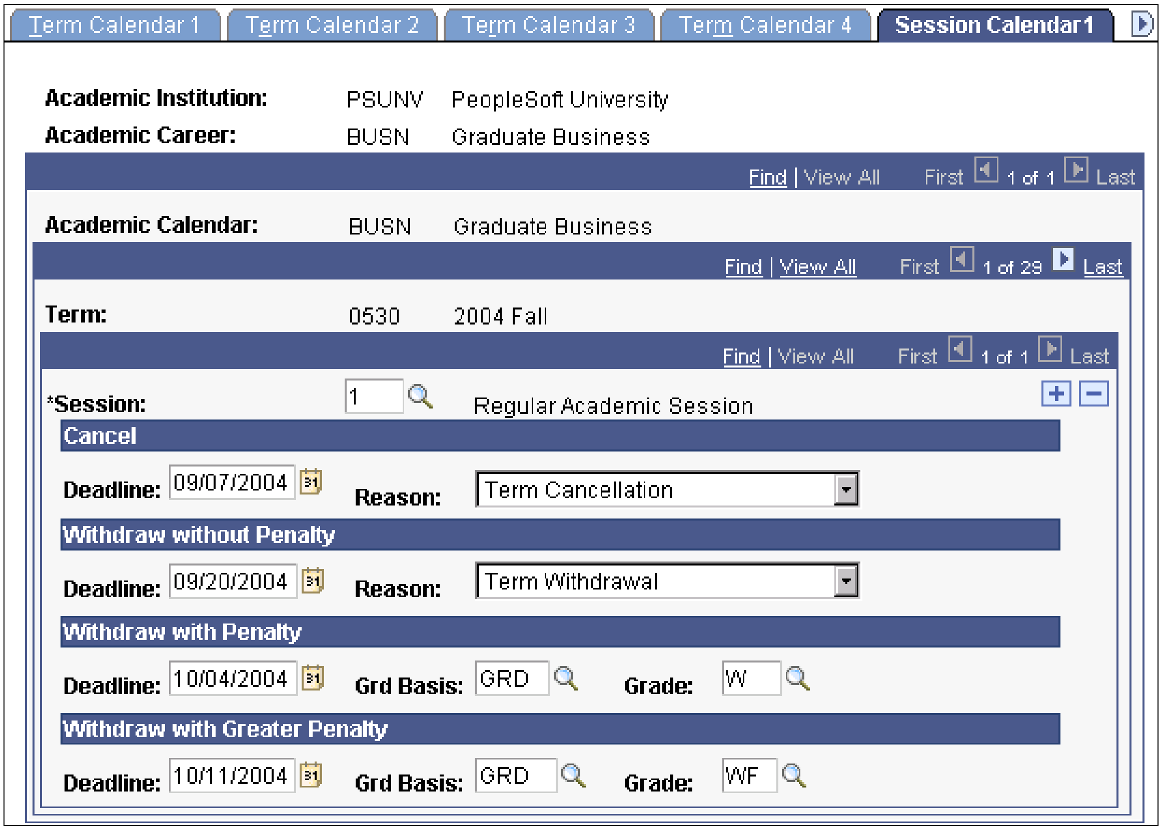
“Applying for Graduation Using Self-Service Pages” (Campus Self Service)

“Applying for Graduation Using PeopleSoft Fluid User Interface” (Campus Self Service)

Setting Up Session Cancellation and Withdrawal Dates

Access the Session Calendar 1 page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Session Calendar 1**).

This example illustrates the fields and controls on the Session Calendar1 page. You can find definitions for the fields and controls later on this page.



Note: For academic institutions that offer an open entry/exit (OEE) session for a term, you are not required to define an OEE session calendar because the cancel, withdraw, and drop information is part of the Open Entry/Exit Dynamic Date rule.

Field or Control	***Description***
Session	Enter the session within the term for which you want to define the specified academic calendar for the specified academic career.

Cancel

Field or Control	***Description***
Deadline	Enter the last date on which students within the specified academic career can cancel their enrollment in a class for this session. Penalty grades are not assigned to cancellations.

Field or Control	*Description*
Reason	Select the reason value that you want the Student Records Term Withdrawal process to assign to affected student enrollment records.

Withdraw without Penalty

Field or Control	*Description*
Deadline	Enter the last date on which students within the specified academic career can withdraw from a class within this session without any grade point average (GPA) penalty.
Reason	Enter the reason value that you want the Student Records Term Withdrawal process to assign to affected student enrollment records.

Withdraw with Penalty

Field or Control	*Description*
Deadline	Enter the last date on which students within the specified academic career can withdraw from a class within this session with penalty. If a student withdraws from the class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline, the class appears on the student's transcripts and affects the student's GPA in proportion to the value of the withdraw-with-penalty grade. The refund effect is based on the refund dates and periods, as defined within Student Financials.
Grd Basis (grading basis)	Enter the grading basis from which you want to select the withdraw-with-penalty grade.
Grade	Enter the grade that students within the specified academic career receive for a class within this session if the student withdraws after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

Withdraw with Greater Penalty

Field or Control	***Description***
Deadline	Enter the last date on which students within the specified academic career can withdraw from a class within this session with greater penalty. If a student withdraws from the class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline, the class appears on the student's transcripts and affects the student's GPA in proportion to the value of the withdraw-with-greater-penalty grade. The refund impact is based upon the refund dates and periods as defined within Student Financials.
Grd Basis (grading basis)	Enter the grading basis from which you want to choose the withdraw-with-greater-penalty grade.
Grade	Enter the grade that students within the specified academic career receive for a class within this session if they withdraw from the class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

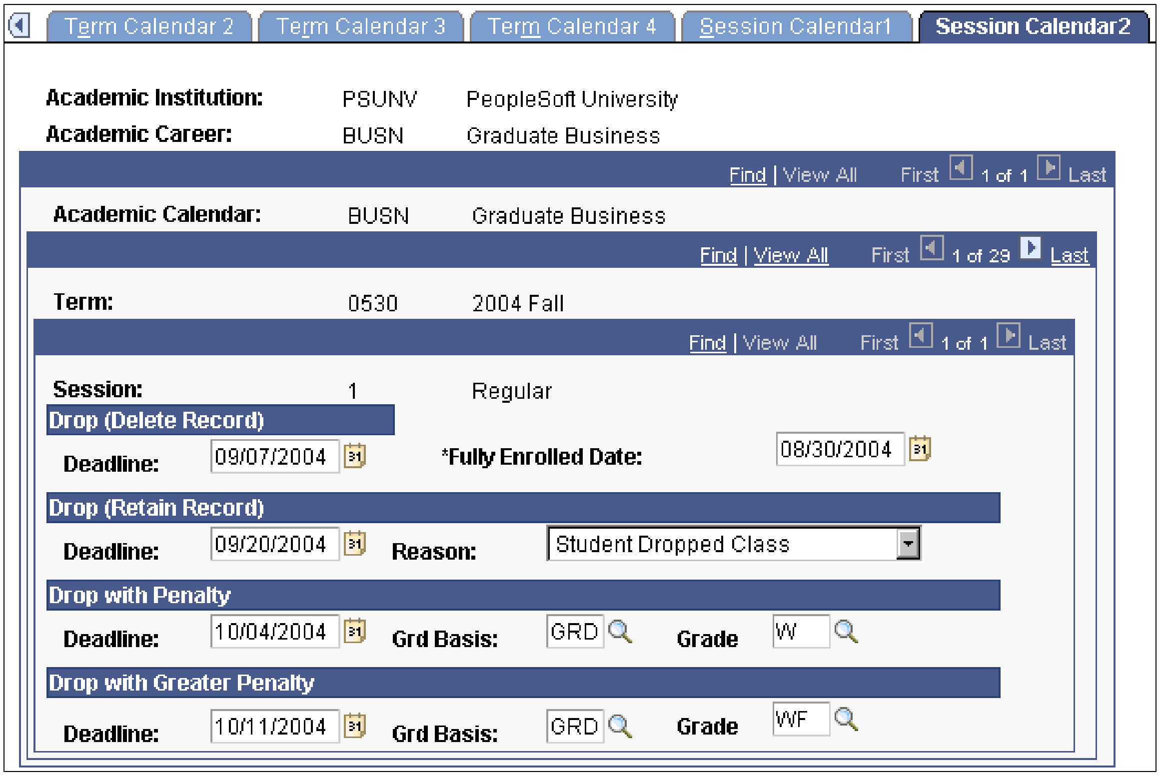
Related Links

“Defining Grading Schemes” (Student Records)
“Understanding Withdrawal and Cancellation Processing” (Student Records)
“Understanding Refunds” (Student Financials)

Setting Up Session Drop Dates

Access the Session Calendar 2 page (**Set Up SACR** > **Foundation Tables** > **Term Setup** > **Academic Calendar** > **Session Calendar 2**).

This example illustrates the fields and controls on the Session Calendar2 page. You can find definitions for the fields and controls later on this page.



Drop (Delete Record)

Field or Control	*Description*
Deadline	Enter the last date on which students within the specified academic career can drop a class within the specified session and have their enrollment record for the class deleted from the student enrollment table (STDNT_ENRL). The dropped class does not have any GPA penalty. The refund impact is based upon the refund dates and periods as defined within Student Financials. When you are using one of the enrollment pages to drop a student from a class during this period and you add an enrollment action reason, the enrollment engine automatically retains the student enrollment record.
Fully Enrolled Date	Enter the date on which the students who are active in the specified session for the specified academic career are considered fully enrolled in the specified session. As of this date, the students' coursework appears on their transcripts. This date is also used for financial aid load calculations and billing purposes.

Drop (Retain Record)

Field or Control	***Description***
Deadline	Enter the last date on which students within the specified academic career can drop from a class within the specified session without having the class appear as a drop on their transcripts and without any GPA penalty. If a student drops a class *after* the drop-and-delete-record deadline but *on or before* the drop-and-retain-record deadline, the system retains the student's enrollment record, sets the record to dropped status, and designates the reason. The refund impact is based upon the refund dates and periods as defined within Student Financials.
Reason	Select the default reason for the class drop. You can modify these translate values.

Drop with Penalty

Field or Control	***Description***
Deadline	Enter the last date on which students within the specified academic career can drop a class within the specified session without having any GPA penalty. If a student drops the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline, the system retains the student's enrollment record, leaves the record as enrolled status, and assigns the drop-with-penalty grade that you specify on this page. The refund impact is based upon the refund dates and periods as defined within Student Financials.
Grd Basis (grade basis)	Enter the grading basis from which you want to choose the drop-with-penalty grade.
Grade	Enter the penalty grade that students within the specified academic career receive for a class within the specified session if they drop the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

Drop with Greater Penalty

Field or Control	*Description*
Deadline	To specify a greater level of penalty, enter the last date on which students within the specified academic career can drop a class within the specified session without greater penalty. If a student drops the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline, the system retains the student's enrollment record, leaves the record as enrolled status, and assigns the drop-with-greater-penalty grade that you specify on this page. The refund impact is based upon the refund dates and periods as defined within Student Financials.
Grd Basis (grade basis)	Enter the grading basis from which you want to choose the drop-with-greater-penalty grade.
Grade	Enter the grade that students within the specified academic career receive for a class within the specified session if they drop the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

Related Links

“Defining Grading Schemes” (Student Records)
“Understanding Class Enrollment Processing” (Student Records)

Chapter 12

Defining Dynamic Academic Calendars

Understanding Dynamic Academic Calendars

If you use the traditional way to design an academic structure in PeopleSoft Student Records, you define the terms, sessions, and academic calendars that control the various academic programs. You use these three elements to determine the significant dates and time periods within each session. For example, you use the academic calendar to set up drop and withdrawal deadlines for each session. However, this academic structure can be limiting.

A dynamic academic calendar provides more flexibility than static landmark dates based on term and session structure. This type of calendar enables you to dynamically control landmark dates for individual classes and even for student enrollments themselves. You might use dynamic academic calendars, for instance, if the academic institution has a rolling admission and enrollment business process that enables students to begin academic programs at any point in the calendar year. In this case, many classes that you offer might use their own academic calendars because the classes have their own deadlines and landmark dates. You can also use dynamic academic calendars if the academic institution offers students open entry enrollment into classes so that the students can enroll at any time during the calendar year and complete the classes at their own pace. Many classes taught over the internet use this type of enrollment, which is called *open entry/exit* (OEE) enrollment.

In a dynamic academic calendar, you establish flexible rules, called *dynamic class date rules,* which enable you to dynamically calculate cancel, withdrawal, and drop deadlines and other landmark dates. You then apply these rules to various parts of the academic structure so that you can calculate the landmark calendar dates for individual classes or student enrollments. You can override the calculations on a case-by-case basis. Consequently, the academic institution can create classes that begin and end at various times throughout a term and session, then dynamically calculate the landmark dates for individual classes based on the dynamic date rules that you assign to classes. In addition, the academic institution can set up OEE enrollment for these classes with dynamic dates so that the enrollment engine calculates landmark dates for each student who enrolls in one of the classes based on the student's enrollment begin date and the OEE dynamic date rule that you assign to the class.

Use the Dynamic Class Dates feature to create dynamic academic calendars for individual classes within a session and for individual OEE student enrollments.

To create dynamic academic calendars:

1. Create dynamic date rules.
2. Set up the academic structure.
3. Schedule the class sections for which you want to create dynamic academic calendars.
4. Calculate landmark date deadlines for the dynamic academic calendars using the Dynamic Class Dates COBOL/SQL process (SRPCDYNP).

You can calculate these deadlines in several ways. For multiple class sections within a term, use the Dynamic Class Dates process page. For individual class sections, use the Dynamic Class Data page. For OEE enrollments, the enrollment engine runs the Dynamic Class Dates process at enrollment time for each student who enrolls in an OEE class section, and the system calculates the deadlines.

Warning! Because the Dynamic Dates Process creates the Dynamic Class Dates table, which the system uses for enrollment transactions, you *must* run the process for classes scheduled in a dynamic date session before you perform enrollment transactions. If you do not run the process, the system has no indication that a rule exists and it might, for example, permit all class drops. This warning does not apply to classes scheduled in OEE sessions.

Dynamic Date Rules

The Dynamic Dates COBOL/SQL process (SRDYNADT and SRPCDYNP) uses a dynamic class date rule to calculate deadlines for landmark dates on the dynamic academic calendars that the process creates. There are two types of dynamic class date rules. The first type, a *dynamic class date rule,* is used to create dynamic academic calendars for individual class sections within a session. The second type, an *OEE dynamic date rule,* is a dynamic class date rule that is designated for open OEE enrollment. The enrollment engine uses the OEE dynamic date rule in conjunction with students' enrollment start dates to calculate dynamic academic calendars for the students whenever they enroll in OEE classes. Regardless of the type of rule that you define, for each rule you must specify the rule schemes, rounding schemes, and factors that the Dynamic Class Dates process uses to calculate the landmark dates on a dynamic academic calendar.

You define a *rule scheme* for the landmark date of a dynamic class date rule. A rule scheme indicates the method that the Dynamic Class Dates process uses as a basis for calculating the applicable landmark date. Your selection varies depending on the type of rule that you define. All rule schemes are valid for dynamic class date rules, but rule schemes that relate to class meetings are invalid for OEE dynamic date rules because of the nature of OEE classes.

You can define rule schemes based on these factors:

- The number of class meetings.
- A percentage of class meetings.
- A percentage of total class hours.
- A point between class start and end date (OEE).
- The day before or after class start date (OEE).
- The day before or after class end date (OEE).

Then, you define a *rounding scheme* for the landmark date of the dynamic class date rule. A rounding scheme enables you to round the deadline up or down to various days. After the Dynamic Class Dates process determines the landmark date according to the rule scheme and factor (known as the *basis day),* it adjusts that date according to the rounding scheme. All rounding schemes are valid for dynamic class date rules, but rounding schemes that relate to class meetings are invalid for OEE dynamic date rules because of the nature of OEE classes.

You can define rounding schemes that use these days:

- Basis day (OEE)

- Beginning of next week (OEE)
- Beginning of week (OEE)
- End of next week (OEE)
- End of week (OEE)
- First meeting of week
- Last meeting of week
- Next day (OEE)
- Next meeting day
- Previous day (OEE)
- Previous meeting day

You must also define a *factor* for the landmark date of the dynamic class date rule. A factor instructs the Dynamic Class Dates process how many units to move the deadline either forward or backward, based on the rule scheme. For example, if you use the percentage of class meetings for the rule scheme and you want the deadline to be at the halfway point of the class, you would enter *.50* (fifty percent).

The Dynamic Class Dates process uses the rule scheme and factor to determine the basis day. If the rule scheme uses the number of class meetings, a percentage of class meetings, a percentage of total class hours, or a point between class start and end date (for non-OEE classes), then the basis day is the class meeting with the maximum value that does not exceed the specified factor. After the Dynamic Class Dates process determines the basis day, it applies the rounding scheme to the basis day to determine the deadline. If the rule scheme uses a point between class start and end date (OEE classes), the day before or after class start date, or the day before or after class end date, then the basis day is the actual calculated date.

Examples of Dynamic Class Date Rules

This section discusses examples of how the Dynamic Dates process calculates deadlines for a dynamic academic calendar.

Suppose that you schedule a class that meets every Wednesday for 7 weeks starting March 4. In the Last Wait List Date group box on the Dynamic Class Dates page, you enter*Percentage of Class Meetings* as the rule scheme and *Beginning of Next Week* as the rounding scheme. You also set the factor to *.30* (thirty percent). The Dynamic Class dates process would calculate the last wait list date as shown in this table:

Meeting	***1***	***2***	***3***	***4***	***5***	***6***	***7***
Date	March 4	March 11	March 18	March 25	April 1	April 8	April 15
Percentage	14%	28%	43%	57%	71%	86%	100%

Based on the rule scheme and factor, the basis day would be the second meeting. By using the basis day as a starting point, the process then rounds the deadline up or down based on the rounding scheme that you specify. In this example, the last day to waitlist the class would be Monday, March 16, which is the beginning of the next week.

This table shows other possible deadlines in this example, depending on the rounding scheme that you enter:

Last Wait List Date Rounding Scheme	***Last Wait List Date Deadline***
Basis day.	March 11
Previous day.	March 10
Next day.	March 12
Next meeting day.	March 18
Beginning of week (Monday).	March 9
Previous meeting day.	March 4
Beginning of next week (next Monday).	March 16

Because the system dynamically calculates the landmark dates of the academic calendar, you can apply the same rule to any number of classes.

To further illustrate how the system uses the dynamic class date rule that you create, suppose that you have a 10-week class that meets once a week, starting January 1. In the Drop Dates group box on the Dynamic Class Dates page, you select a rule scheme of *Number of Class Meetings* and a rounding scheme of *Basis Day.* You have four drop deadlines—drop and delete record, drop but retain record, drop with penalty, and drop with greater penalty. The consequence of violating each deadline becomes more severe as time passes. Suppose that you want these deadlines to occur a week apart, starting the second week of class. You would enter *2* in the **Drop Deadline (delete) Factor** field, *3* in the **Drop Deadline (retain) Factor** field, *4* for the **Drop Deadline (Penalty) Factor** field, and *5* for the **Drop Deadline (Penalty2) Factor** field.

After you save the rule and assign it to the appropriate class, the Dynamic Class Dates process can dynamically calculate each of these drop deadlines for the class. According to the rule scheme and factors that you specified, the process calculates the basis day for each of the drop deadlines as January 8, January 15, January 22, and January 29. In this scenario, because you have used a basis day rounding scheme, the process determines that the drop deadlines are the same as the dates for the basis days.

Creating Dynamic Class Date Rules

To set up dynamic class date rules, use the Dynamic Class Dates component (DYN_CLASS_TBL).

This section discusses how to establish dynamic class date rules.

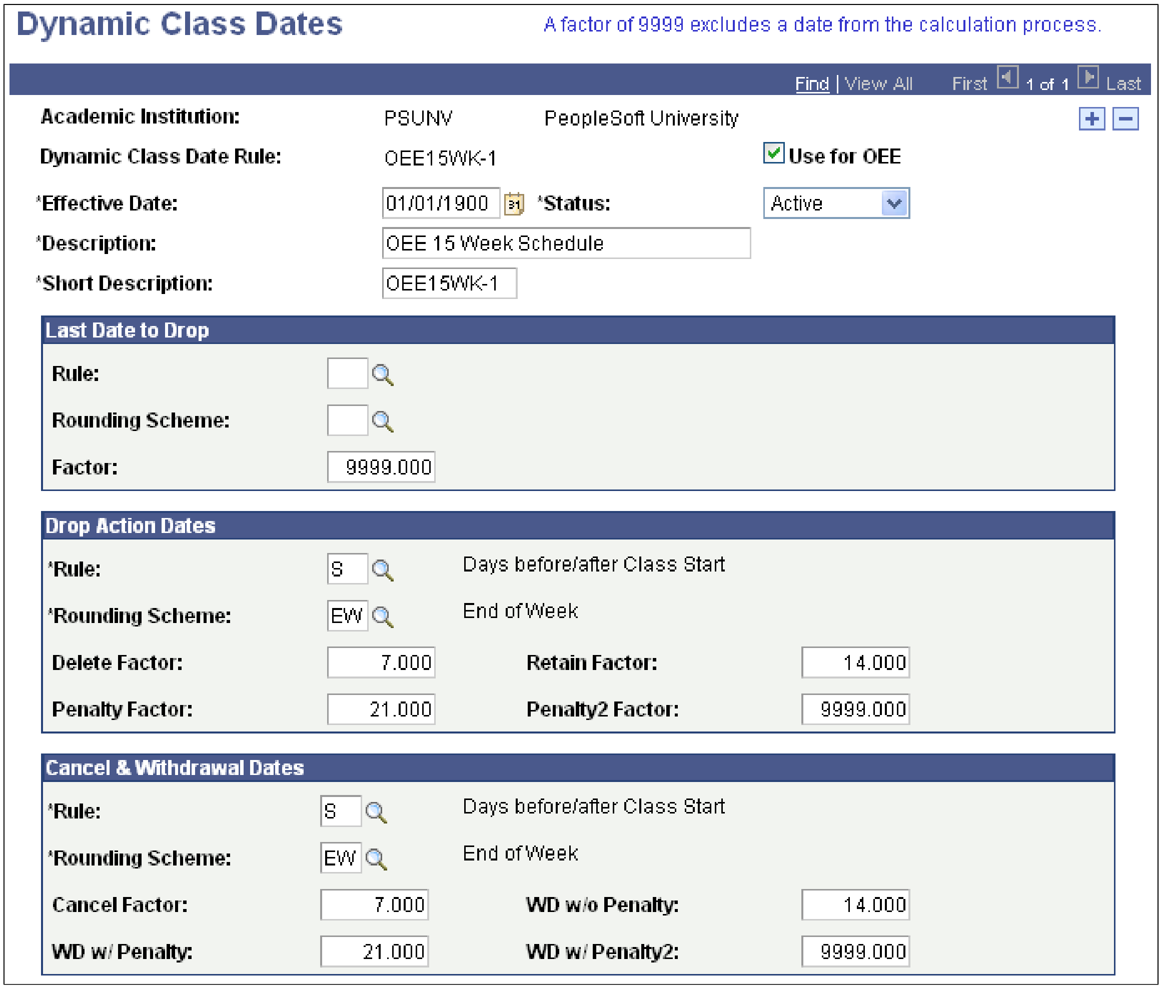
Page Used to Create Dynamic Class Date Rules

Page Name	*Definition Name*	*Navigation*	*Usage*
Dynamic Class Dates	DYN_CLASS_DATA_TBL	**Set Up SACR** > **Product Related** > **Student Records** > **Curriculum Management** > **Dynamic Class Dates** > **Dynamic Class Dates**	Establish dynamic class date rules and OEE dynamic date rules for an academic institution. Rules enable you to dynamically calculate cancel, withdrawal, and drop deadlines and other landmark dates. You then apply these rules to various parts of the academic structure so that you can calculate the landmark calendar dates for individual classes or student enrollments.

Establishing Dynamic Class Date Rules

Access the Dynamic Class Dates page (**Set Up SACR** > **Product Related** > **Student Records** > **Curriculum Management** > **Dynamic Class Dates** > **Dynamic Class Dates**).

This example illustrates the fields and controls on the Dynamic Class Dates 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 Dynamic Class Dates page (2 of 2). You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Use for OEE (use for open entry/exit)	Select to make this dynamic class date rule applicable *only* to OEE class sections. This option distinguishes the rule as an OEE dynamic date rule. Clear the check box to make the dynamic class date rule applicable only to regular dynamically dated class sections. Depending on your selection, the dates for which you must define rules, rounding schemes, and factors vary according to individual needs, as do the translate values for the **Rule** and **Rounding Scheme** fields. You *must* enter a value for this check box before defining rule schemes, rounding schemes, and factors.

Last Date to Drop

In the **Last Date to Drop** group box, enter the rule scheme, rounding scheme, and factors that the Dynamic Dates process uses to calculate the last drop date for classes or OEE enrollments to which this rule applies.

Drop Action Dates

In the **Drop Dates** group box, enter the rule scheme, rounding scheme, and factors that the Dynamic Dates process uses to calculate the drop deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the drop-and-retain-record deadline and the grade for the drop-with-penalty deadlines according to the student's primary academic program. Define reason codes and grades for drops by academic program on the Dynamic Date page of the Academic Program Table component.

Cancel & Withdrawal Dates

Enter the rule scheme, rounding scheme, and cancel factor that the Dynamic Class Dates process uses to calculate the cancel and withdrawal date deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the cancellation, and the grade for the withdraw-with-penalty deadlines, according to the student's academic program. Define reason codes and grades for withdrawals by academic program on the Dynamic Dates page of the Academic Program Table component.

Lapse Start Date

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the lapse start date for classes or OEE enrollments to which this rule applies. The lapse start date is the first date on which a student's grade lapses. This date determines when the grade lapse rules go into effect for students.

Sixty Percent Point In Time

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the 60 percent point in time for classes or OEE enrollments to which this rule applies. The 60 percent point in time is the date that you consider the class or OEE enrollment to be 60 percent complete. The system uses this date when computing refunds. In the U.S., the majority of academic institutions stop issuing refunds at this point in time.

Census Date

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the census date for classes or OEE enrollments to which this rule applies. The census date is the official cutoff date for census statistics.

Fully Graded Date

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the date on which a student is considered to be fully graded for classes or OEE enrollments to which this rule applies. This field is optional. When you define transcript types, you can indicate on the Define Transcript Type – Basic Data page whether the transcript processes uses this date and displays grades for classes within the term.

Class End Date

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the end date of a class for OEE enrollments to which this rule applies. This field is unavailable for when you define OEE dynamic date rules.

Related Links

Setting Up Session Drop Dates

Setting Up Session Cancellation and Withdrawal Dates

Setting Up Dynamic Class Dates

After you create dynamic class date rules, you must set up the Dynamic Class Dates feature within the academic structure so that you can create dynamic academic calendars.

To set up the Dynamic Class Dates feature:

1. On the Academic Career Table page, indicate in the **Allow OEE Enrollment** field whether by default you permit the scheduling of OEE class sections for all course offerings that you tie to an academic career.

   See Defining Academic Careers.

   See Describing Academic Career Parameters.

2. On the Academic Career Table 2 page, select the **Use Dynamic Class Dates** check box to make available the Dynamic Date page of the Academic Program Table component.

   You use the Dynamic Date page to set up the reasons and penalties for canceling, withdrawing from, and dropping dynamically dated classes. To define a default dynamic class date rule for courses within the academic career, enter the rule in the **Dynamic Class Date Rule** field. To define a default OEE dynamic class date rule for the courses within the academic career, enter the rule in the **OEE Dynamic Date Rule** field.

   See Setting Additional Academic Career Parameters.

3. On the Program 1 page of the Academic Program Table component, indicate in the **Allow OEE Enrollment** field whether to permit OEE enrollment for students within a specific academic program.

   See Describing Academic Career Parameters.

4. On the Dynamic Date page of the Academic Program Table component, set up dynamic date fields for a specific academic program.

   This page is available only if you enable the Dynamic Class Dates features on the Academic Career Table 2 page. For students within an academic program to be able to drop or withdraw from OEE classes, you must define the values on the Academic Program - Dynamic Date page.

   See Setting Up Dynamic Date Fields for Academic Programs.

5. On the Term Table page, select the **Use Dynamic Class Dates** check box to select the Dynamic Class Dates feature by default for each session created within a term.

   See Defining Terms.

6. On the Session Table page, select the **Use Dynamic Class Dates** check box to enable the Dynamic Class Dates feature for all classes that you schedule within a session.

To schedule OEE class sections for a course within a particular academic institution, academic career, and term combination, for each combination you must define one OEE in the **Session** field.

See Defining Sessions.

7. On the Offerings page of the Course Catalog component, in the **Dynamic Class Date Rule** field, enter the default rule that you want the Dynamic Class Dates process to assign to all class sections of the course offering that you schedule.

   To enable students to enroll in OEE class sections of a course offering, select the **Allow OEE Enrollment** check box. The **OEE Dynamic Date Rule** field becomes available. Then, enter a default OEE dynamic date rule that the system assigns to all OEE class sections of the course offering that you schedule. If you have assigned a dynamic class date rule or an OEE dynamic date rule on the Academic Career Table 2 page, then the system uses that value in the corresponding field on the Course Catalog - Offerings page when you create a new course catalog record.

   See “Defining Course Offerings” (Student Records).

8. On the Components page of the Course Catalog component, select the **Primary Component** check box to indicate the primary component of the course offering.

   Also, indicate the additional components that you want the Dynamic Class Dates process to include in its calculations by selecting the **Include In Dynamic Date Calc** (include in dynamic date calculations) check box for the component.

   See “Defining Course Components” (Student Records).

9. On the Basic Data page of the Schedule New Course component, select the **Include In Dynamic Date Calc** check box to also include a non primary component of the class section in the Dynamic Class Dates process calculations.

   To schedule OEE class sections, you must enter *OEE* in the **Session** field. Finish scheduling the class.

   See “Defining Basic Data for Class Sections” (Student Records).

10. On the Class Components page of the Class Associations component, in the **Primary Component** field, enter the primary component for the class that you are scheduling.

    Because the system takes the value for the primary component from the Course Catalog - Components page, use the Class Associations component only if you are changing the primary component for the term.

    See “Modifying Class Components” (Student Records).

After you complete the setup for the Dynamic Class Dates feature, you can dynamically calculate the academic calendar landmark dates for classes.

Creating Dynamic Academic Calendars by Term

This section discusses how to calculate dynamic academic calendars by term.

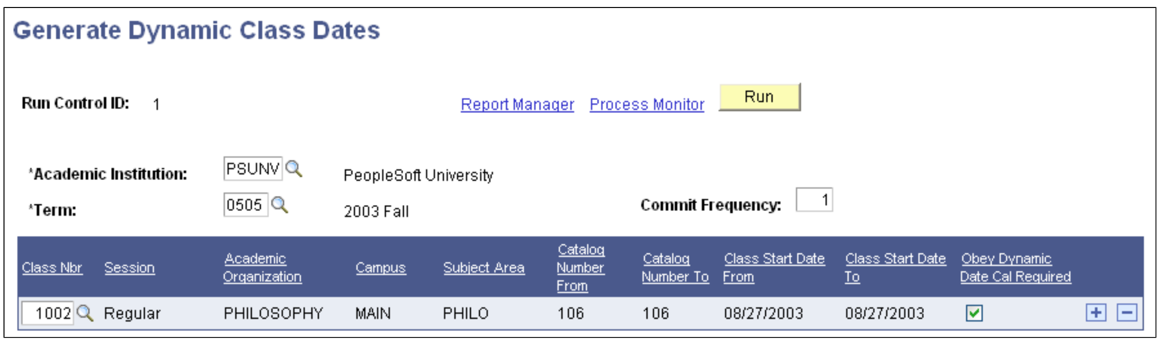
Page Used to Calculate Dynamic Academic Calendars by Term

Page Name	***Definition Name***	***Navigation***	***Usage***
Generate Dynamic Class Dates	RUNCTL_SRPCDYNP	**Curriculum Management** > **Dynamic Dates** > **Generate Dynamic Class Dates** > **Generate Dynamic Class Dates**	Dynamically calculate the academic calendar deadlines for class sections that you have scheduled for a term.

Calculating Dynamic Academic Calendars by Term

Access the Generate Dynamic Class Dates page (**Curriculum Management** > **Dynamic Dates** > **Generate Dynamic Class Dates** > **Generate Dynamic Class Dates**).

This example illustrates the fields and controls on the Generate Dynamic Class Dates page . You can find definitions for the fields and controls later on this page.



Use the fields in the lower portion of the page to enter the criteria that the Dynamic Class Dates process uses to determine which class sections to process. Enter as many criteria as necessary to include all the class sections for which the system must dynamically calculate academic calendar dates. After the system calculates the deadlines, you can view, override, and recalculate them on a section-by-section basis on the Dynamic Class Data page of the Dynamic Class Dates component.

Field or Control	***Description***
Academic Institution	Enter the academic institution for which you want to run the Dynamic Class Dates process for multiple class sections. The system supplies this value from the User Defaults 1 page, but you can override the default value.
Term	Enter the term that contains the class sections for which you want to run the Dynamic Class Dates process.

Field or Control	***Description***
Commit Frequency	Enter a commit frequency. Lower commit frequencies provide better concurrence of data. Although higher commit frequencies enable faster job processing, jobs may become busy with other processes. You should retain the default commit frequency or enter *1*.
Class Nbr (class number)	Enter the class number for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules. The system displays the scheduled classes for the specified term and academic institution. After you enter the class number and exit the field, the system populates the values for the remaining selection criteria. To dynamically calculate academic calendar dates for multiple class sections on this row, leave this field blank.
Session	Enter the session (in the specified term and academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections. You can modify these translate values. To dynamically calculate academic calendar dates for multiple sessions on this row, leave this field blank.
Academic Organization	Enter the academic organization (within the specified academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
Campus	Enter the campus (within the specified academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
Subject Area	Enter the subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
Catalog Number From	Enter the first catalog number in the range if you have a specific range of catalog numbers within a subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
Catalog Number To	Enter the last catalog number in the range.
Class Start Date From	Enter the first class start date in the range if you have a specific range of class start dates for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
Class Start Date To	Enter the last class start date in the range.

Field or Control	*Description*
Obey Dynamic Date Cal Required (obey dynamic date calculation required)	Select to have the Dynamic Class Dates process include in its calculations only the components of a scheduled class section within a dynamically dated session for which the system has selected the **Dynamic Date Calc Required** (dynamic date calculation required) field on the Basic Data page of the schedule of classes. The system selects this field whenever you modify the class meeting pattern for a component of a scheduled class section. Clear this check box to have the system calculate academic calendar dates and assign OEE dynamic date rules for all scheduled class sections.
Run	Click to run this request. PeopleSoft Process Scheduler runs the Dynamic Class Dates SQL process at user-defined intervals. You can also run the Dynamic Class Dates SQR report (SRDYNADT), or the Dynamic Class Dates multiprocess job, which consists of both the Dynamic Class Dates process and the SQR report. After the process finishes, the system makes the rows that you included in the run request unavailable for editing, but it still displays these rows so that you can review the processing parameters of the run. These rows have no effect on future processing.

Managing Dynamic Academic Calendars for Class Sections

If you have attached the dynamic class date rule directly to the course offering, the Dynamic Class Dates process uses that rule every time that you run the process for a scheduled class section of that course offering. Although this ensures consistency and facilitates maintenance, you might want to apply rules directly to each class section, modify the course offering default rule for specific class sections, or manually enter a deadline for a dynamic academic calendar date. You can use the Dynamic Class Dates component to accomplish these tasks and more. With this component, you can also view the class meeting patterns of class sections and Dynamic Class Date process messages.

This section discusses how to:

- Calculate, view, and override dynamic academic calendar dates.
- View class meeting patterns.
- View dynamic class date process messages.

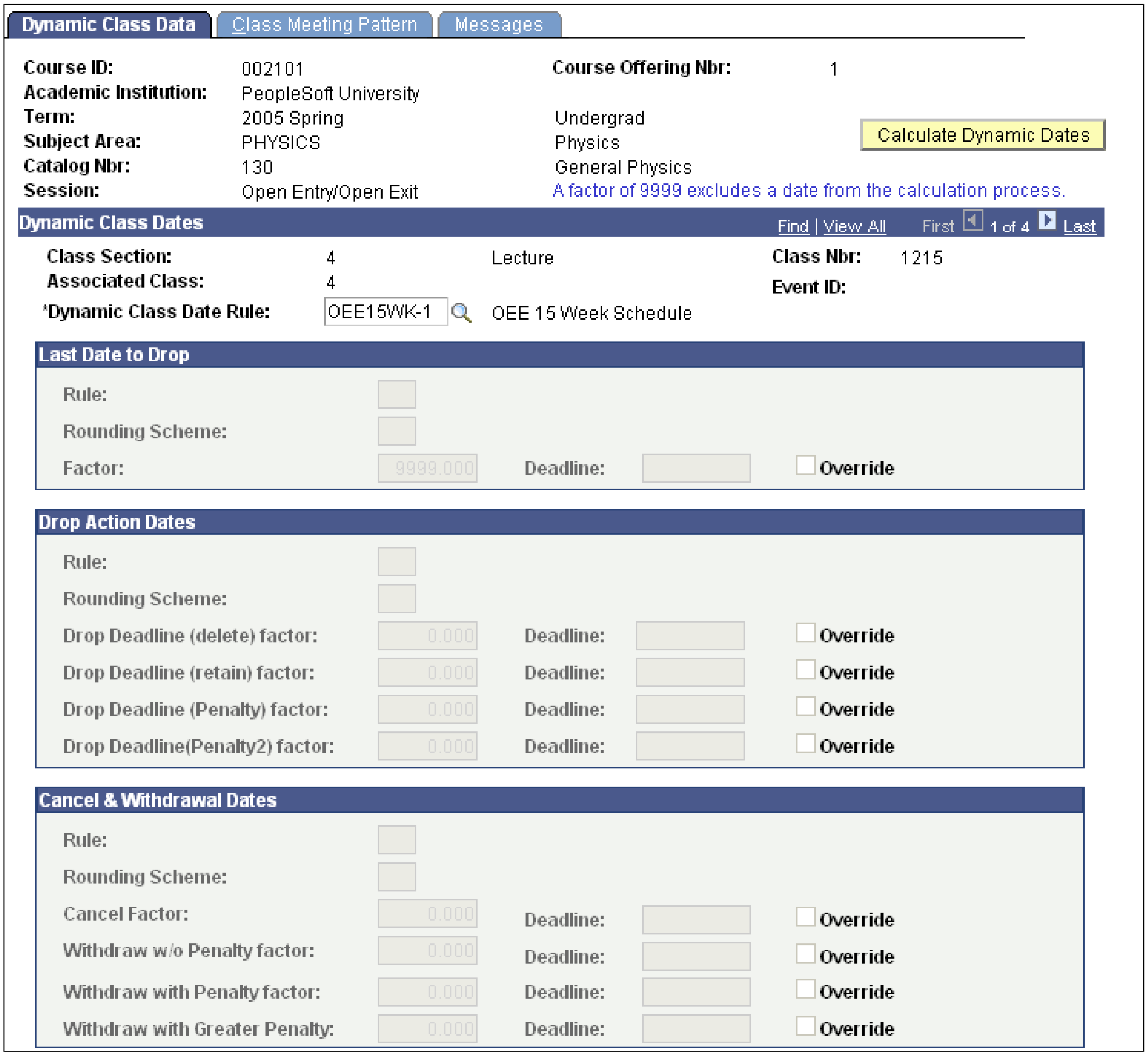
Pages Used to Manage Dynamic Academic Calendars for Class Sections

Page Name	***Definition Name***	***Navigation***	***Usage***
Dynamic Class Data	DYN_CLASS_DATA1	**Curriculum Management** > **Dynamic Dates** > **Class Section Dynamic Dates** > **Dynamic Class Data**	Run the Dynamic Class Dates process for a class section, or view and override the calculated results.
Class Meeting Pattern	DYN_CLASS_MTG_PAT	**Curriculum Management** > **Dynamic Dates** > **Class Section Dynamic Dates** > **Class Meeting Pattern**	View the class meeting pattern of the class section for which you dynamically calculate academic calendar dates.
Messages	DYN_CLASS_DATA_MSG	**Curriculum Management** > **Dynamic Dates** > **Class Section Dynamic Dates** > **Messages**	View the Dynamic Class Date process status and messages related to each class section for which you have dynamically calculated academic calendar dates.

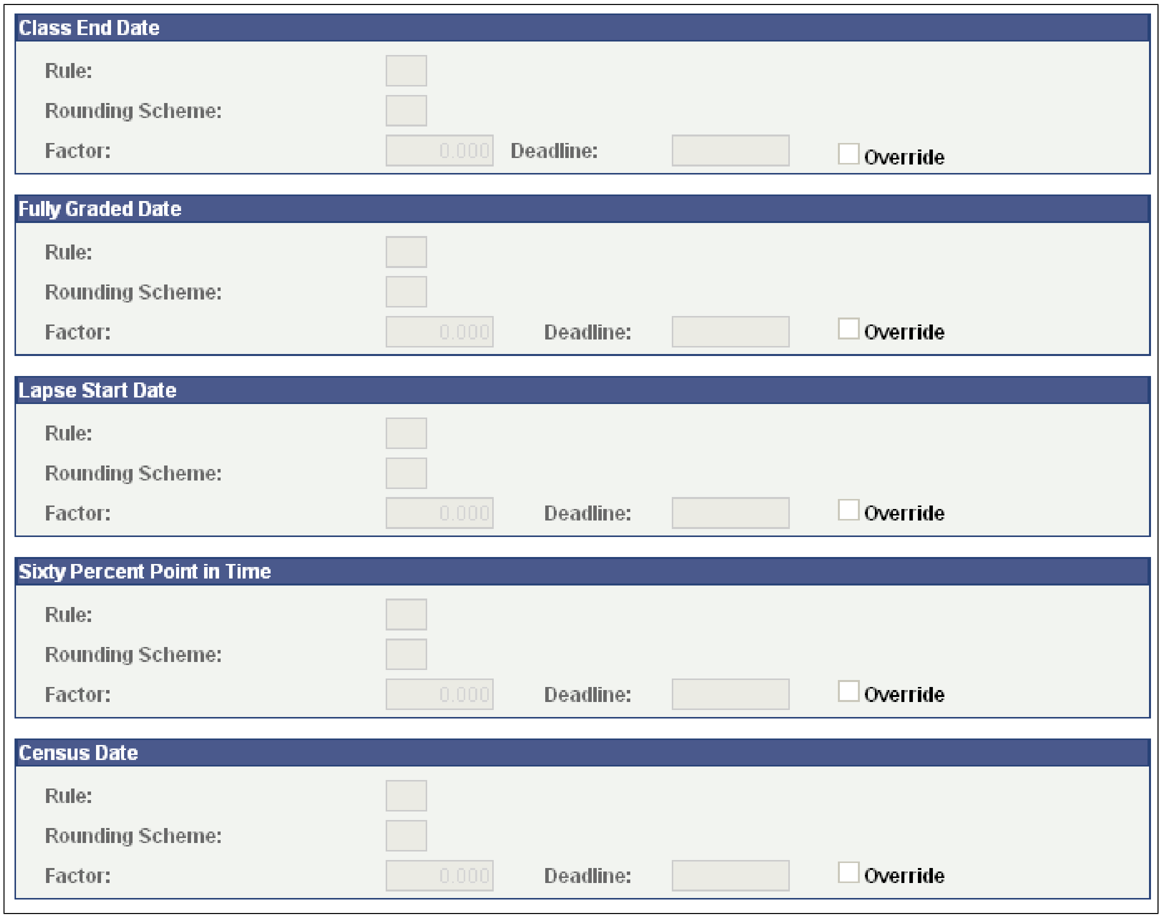
Calculating, Viewing, and Overriding Dynamic Academic Calendar Dates

Access the Dynamic Class Data page (**Curriculum Management** > **Dynamic Dates** > **Class Section Dynamic Dates** > **Dynamic Class Data**).

This example illustrates the fields and controls on the Dynamic Class Data page (1 of). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Dynamic Class Data page (2 of 2). You can find definitions for the fields and controls later on this page.



When you run the Dynamic Class Dates process, the Dynamic Class Data page displays the rule scheme, rounding scheme, and factor of each academic calendar date found in the rule. Additionally, for non-OEE dynamic date sections, the process calculates and displays deadline dates. After you run the Dynamic Class Dates process, you can use this page to override the calculated deadlines. You can also use this page to attach a different rule to a class section and rerun the Dynamic Class Dates process.

Note: Assign a factor of *9999* to exclude a date from the calculation process.

Field or Control	***Description***
Event ID	Displays the event ID that the system associates with the section when you schedule the class.

Field or Control	*Description*
Dynamic Class Date Rule	Enter the dynamic class date rule that you want to apply to each primary component class section when you run the Dynamic Class Dates process. Click the **Calculate Dynamic Dates** button to run the Dynamic Class Dates process. If you leave this field blank and click the **Calculate Dynamic Dates** button to run the process, the process assigns the rule that you specified on the Offerings page to each corresponding primary component class section. If you have already run the process using the Dynamic Class Dates process page, this field displays the rule that the process used to dynamically calculate the academic calendar dates. You can apply a different rule, as necessary, to a class section and rerun the process.
Calculate Dynamic Dates	Click to run the Dynamic Class Dates process. The process dynamically calculates the academic calendar deadlines based on the rule that you have attached to the primary component class sections, either in the **Dynamic Class Date Rule** field or in the corresponding field on the Offerings page. The process displays the calculated deadlines for each landmark date. If you make changes to the rule that applies to a class section after you have run the Dynamic Class Dates process, you must rerun the process to update these deadlines. For OEE class sections, the process assigns and displays the associated rules, rounding schemes, and factors based on the rule that you have attached to a primary component class section, either in the **Dynamic Class Date Rule** field or in the corresponding field on the Offerings page. The system calculates deadlines for OEE class during enrollment processing. **Note:** You can click this button as many times as necessary to have the Dynamic Class Dates feature calculate and recalculate the landmark date deadlines.
Deadline and **Override**	The Dynamic Class Dates process displays the dynamically calculated deadline for the corresponding landmark date according to the dynamic class date rule that you apply to the class section. If you select the corresponding **Override** check box, this field becomes available so that you can manually enter a new deadline. The system calculates deadlines for OEE class during enrollment processing.

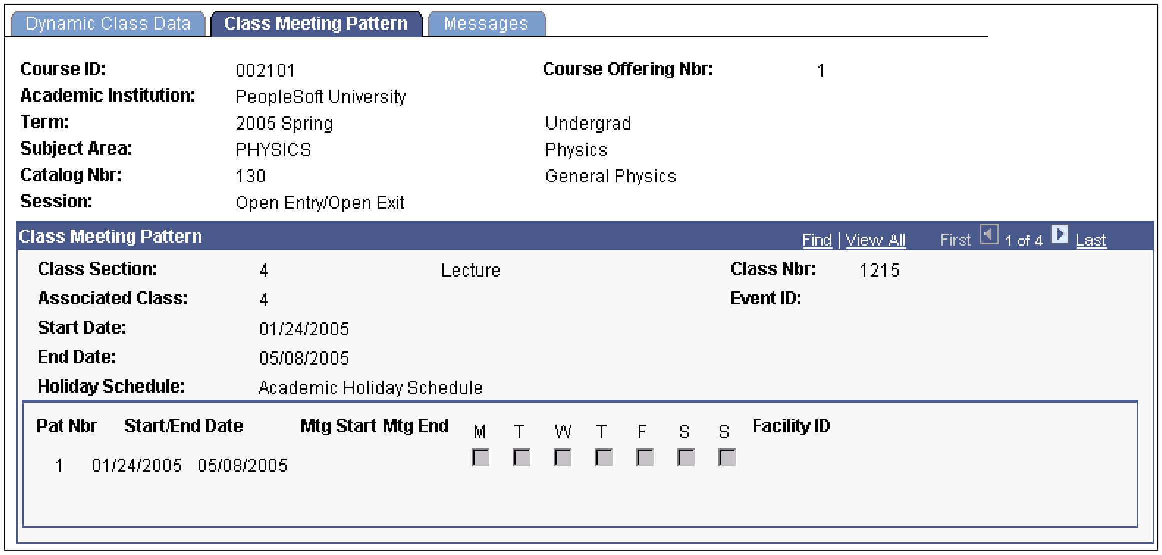
Related Links

Creating Dynamic Class Date Rules

Viewing Class Meeting Patterns

Access the Class Meeting Pattern page (**Curriculum Management** > **Dynamic Dates** > **Class Section Dynamic Dates** > **Class Meeting Pattern**).

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



The system displays the start and end date of the class section, plus class meeting pattern detail for all sections scheduled within a dynamic date or OEE session. If you have already calculated deadlines for the class section, this data enables you to determine if the calculated deadlines are appropriate or whether to override the deadlines or apply a different rule to the class section.

Field or Control	***Description***
Holiday Schedule	Displays the holiday schedule for the class section.
Pat Nbr (pattern number)	Displays the sequence number that identifies the class meeting pattern of the section. The first row always indicates the class meeting pattern of the primary class component. Subsequent rows indicate additional class meeting patterns for a particular class section.
Start Date and **End Date**	Displays the start and end dates of the class component.
Mtg Start (meeting start) and **Mtg End** (meeting end)	Displays the meeting start and end time of the class component.
M (Monday), **T** (Tuesday), **W** (Wednesday), **T** (Thursday), **F** (Friday), **S** (Saturday), and **S** (Sunday)	Indicates the days of the week that the class component meets.
Facility ID	Indicates where the class component meets.

Viewing Dynamic Class Date Process Messages

Access the Messages page (**Curriculum Management** > **Dynamic Dates** > **Class Section Dynamic Dates** > **Messages**).

If the Dynamic Class Dates process encounters any difficulties when it calculates the deadlines for the class section, it writes a message to the message log and displays that message on this page. Use these messages to troubleshoot the problem.

Field or Control	***Description***
Status	Displays the status of the process run.
Message Text	Displays any messages written to the message log that relate to the process run.
Severity	Displays the severity of messages written to the message log that relate to the process run.
Set	Displays the message catalog set to which the message belongs.
Message Number	Displays a number that identifies the message within the message catalog set to which it belongs.

Managing Dynamic Academic Calendars for OEE Enrollments

If you have set up the academic structure such that a student can enroll in an OEE class, the enrollment engine runs the Dynamic Class Dates process at enrollment time for each student who enrolls in an OEE class section. The Dynamic Class Dates process uses the OEE dynamic date rule that you have associated with the class to calculate the deadlines. The process then stores these dynamically calculated deadlines for the student's OEE enrollment in the STDNT_ENROLL_OEE table. To view and override these deadlines, use the Student OEE Enroll Data page.

This section discusses how to view and override dynamic academic calendar dates for OEE enrollments.

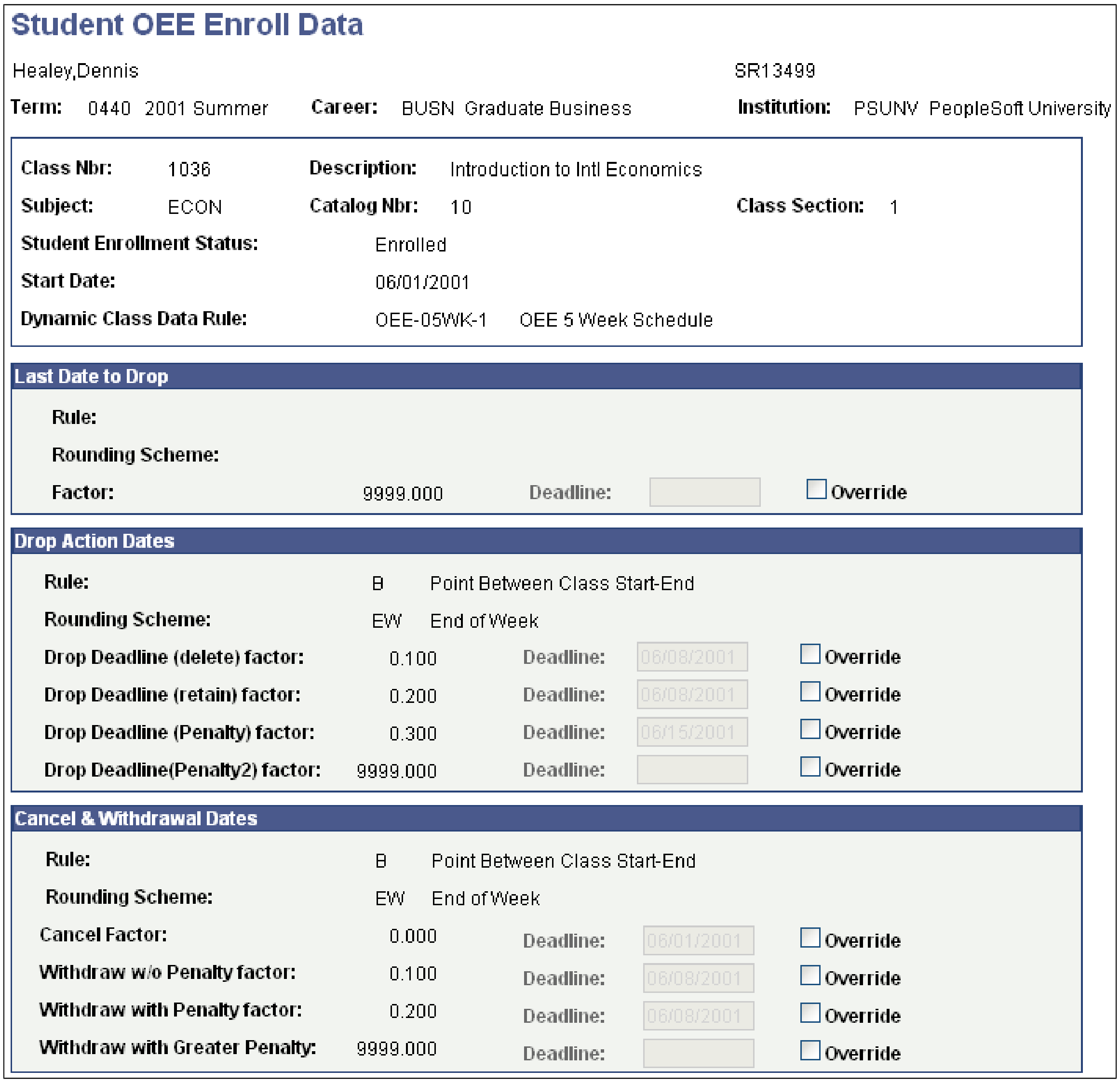
Page Used to Manage Dynamic Academic Calendars for OEE Enrollments

Page Name	***Definition Name***	***Navigation***	***Usage***
Student OEE Enroll Data (student open entry/exit enrollment data)	OEE_ENRL_DATES	**Records and Enrollment** > **Enroll Students** > **Student OEE Enrollment Data** > **Student OEE Enroll Data**	View and override the academic calendar date deadlines that the Dynamic Class Dates process calculates for a student's OEE enrollment.

Viewing and Overriding Dynamic Academic Calendar Dates for OEE Enrollments

Access the Student OEE Enroll Data page (**Records and Enrollment** > **Enroll Students** > **Student OEE Enrollment Data** > **Student OEE Enroll Data**).

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

The Dynamic Class Dates process calculates these deadlines based on the start date of the student's enrollment, which is specified at enrollment time. The Student OEE Enroll Data page displays the rule scheme, rounding scheme, and factor of each academic calendar date in the rule, as well as the calculated deadline.

Field or Control	***Description***
Start Date	Displays the date that the student started enrollment in the OEE class. This date drives the Dynamic Class Dates process calculations for OEE enrollments.
Dynamic Class Data Rule	Displays the rule that the Dynamic Class Dates process applied to this class when the student enrolled in the class. If you run the Dynamic Class Date process, which assigns a rule to the primary component of the OEE class, or if you assign a rule to the class on the Dynamic Class Dates page, then the enrollment engine uses that rule to calculate the deadlines for the landmark dates of the dynamic academic calendar. Otherwise, the enrollment engine uses the OEE dynamic date rule, which is specified on the Offerings page.

Field or Control	*Description*
Deadline and **Override**	The Dynamic Class Dates process displays the deadline for the corresponding landmark date, calculated according to the dynamic class date rule that you have applied to the class. If you select the corresponding **Override** check box, this field becomes available so that you can manually enter a new deadline.

Related Links

Creating Dynamic Class Date Rules

Chapter 13

Defining Programs, Plans, and Subplans

Defining Academic Programs

To set up academic programs, use the Academic Program Table component (ACADEMIC_PROG_TBL).

This section provides an overview of academic programs and discusses how to:

- Describe academic programs.
- Set up defaults for academic programs.
- Set up academic standing parameters for academic programs.
- Set up honor and award parameters for academic programs.
- Establish academic organization ownership for academic programs.
- Set taxonomy and repeat checking options for academic programs.
- Define campuses and business units for academic programs.
- Define grade lapse rules for academic programs.
- Set up term enrollment limits for academic programs.
- Set up session enrollment limits for academic programs.
- Set up course count limits for academic programs.
- Set up dynamic date fields for academic programs.
- (AUS) Set up Australian academic programs.
- (NZL) Set up New Zealand academic programs.
- (NLD) Set up Netherlands home campus information.
- Define academic programs for the advisement self-service what-if scenarios.
- Identify any additional Common Attribute Framework attributes for the academic program.

Understanding Academic Programs

An *academic program* is the program to which a student applies and is admitted and from which the student graduates. For instance, at a 4-year liberal arts college, the academic program is a liberal arts undergraduate program. At a larger university with a college of fine arts, a school of engineering, and a college of arts and sciences, the academic programs correspond to those broad categories. At a graduate school, there can be a distinct academic program for every area of study, such as a doctoral program in mathematics and a doctoral program in molecular biology.

The academic program controls many factors at the student level. For example, the academic program controls the student's academic level, academic load, academic calendar, academic group for tuition calculation purposes, grading scheme, and admissions evaluation scheme. After you establish academic programs, you can create academic plans (which are subdivisions of academic programs) and academic subplans (which are subdivisions of academic plans).

Pages Used to Define Academic Programs

Note: For documentation about the Program Enrollment Mapping page, see *PeopleSoft Student Records 9.0,* Setting Up Program Enrollment, Mapping Campus Solutions Academic Programs, Plans and SubPlans to AIR Based Programs of Study.
For documentation about the Academic Program – Research Processing Options page, see *PeopleSoft Student Records 9.0,* Setting Up Research Tracking, Setting Up Research Tracking Options for Academic Programs.

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Program	ACADEMIC_PROG_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Academic Program**	Describe every academic program at an academic institution and link each academic program to an academic career, grading scheme, academic group, academic level rule, and academic calendar.
Standing/Honors	ACAD_PROG_STDG_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Standing/Honors**	Set up academic standing rules and parameters for academic programs. Set up honor and award rules and parameters for academic programs.
Taxonomy/Campus	ACAD_PROG_OWNR_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Taxonomy/ Campus**	Establish academic organization owners of the academic program for reporting, analysis, and work distribution purposes. Also, link academic programs to Classification on International Programs (CIP) codes and Higher Education General Information Survey (HEGIS) codes. Define the home campus and business unit for academic programs and the valid campuses for financial aid, registration, and advisement.

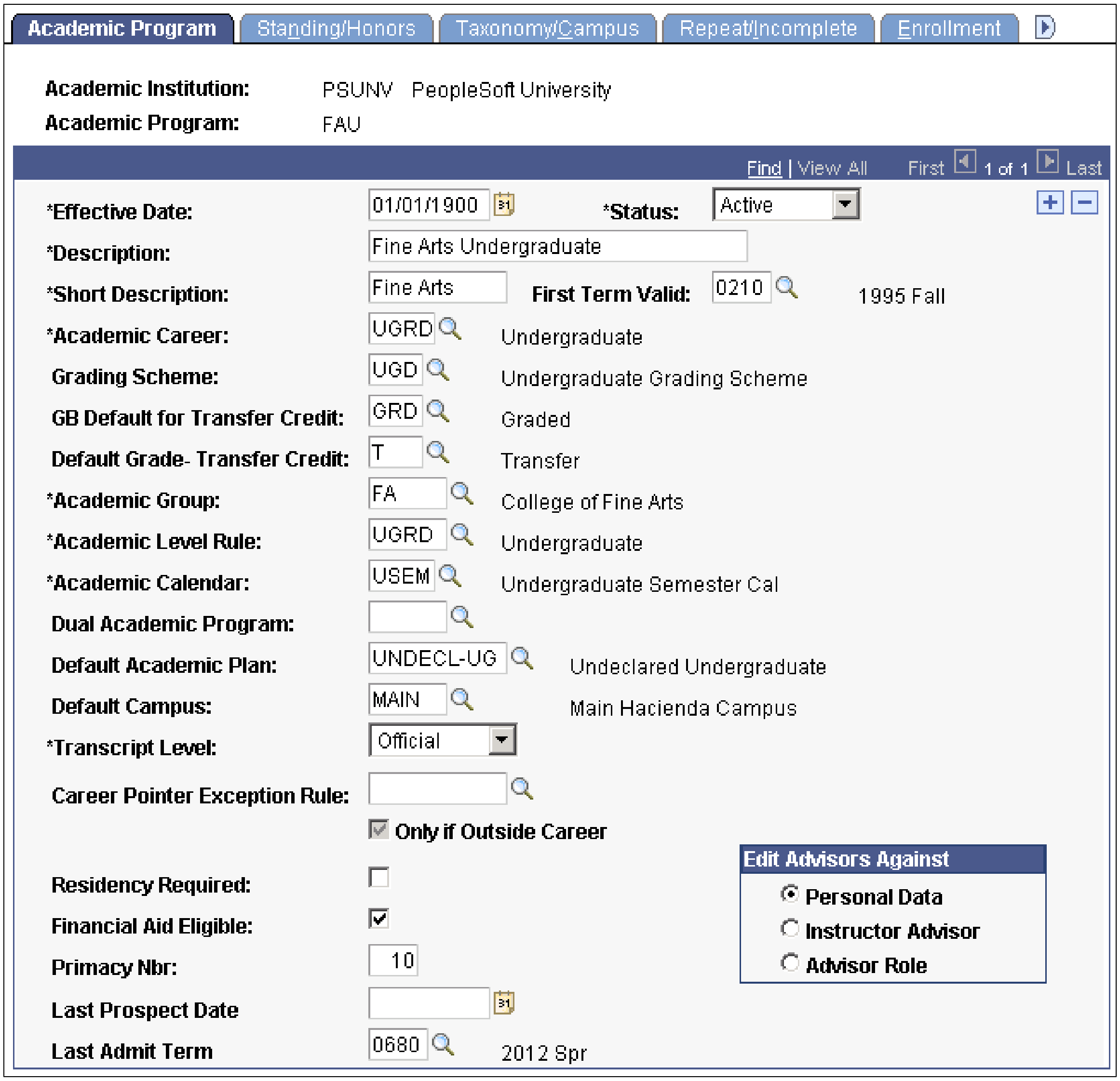
Page Name	***Definition Name***	***Navigation***	***Usage***
Repeat/Incomplete	INCOMPLETE_GRADE	**Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Repeat/ Incomplete**	Define grade lapse rules for academic programs. Each rule defines the grade to which incomplete grades lapse when you run reports. The rules also determine the related transcript notes that appear on a student's transcript. Set repeat checking controls at the academic program level and link repeat rules to academic programs.
Enrollment	ENRL_LIMITS_TBL	**Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Enrollment**	Set up class enrollment limits for students' academic programs, according to term categories.
Course	CRSE_COUNT_LIMITS	**Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Course**	Set up students' enrollment limits for courses in a specified term category and session type within academic programs. Set up class enrollment limits for students' academic programs, according to sessions.
Dynamic Date	ACAD_PROG_DYN_DATE	**Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Dynamic Date**	Set up dynamic date fields for a specific academic program.
Academic Program AUS (Australia)	SSR_ACAD_PROG_AUS	**Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Academic Program AUS**	Link Australian government reporting codes to academic programs.
Acad Prog NZL (academic program New Zealand)	SSR_ACAD_PROG_NZL	**Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Acad Prog NZL**	Link New Zealand government reporting codes to academic programs.

Page Name	***Definition Name***	***Navigation***	***Usage***
Home Campus NLD (home campus netherlands)	SSR_PROG_OWN_NLD	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Home Campus NLD**	Set up home campus information for Dutch students.
Advisement	SSR_PROG_TBL_AA	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Advisement**	Identify if you want active students, advisors, and prematriculated students to be able to select this program on the What-If Report – Create What-if Scenario (SAA_SS_WHATIF) page.
SFP Attributes	ACADEMIC_PROG_SFP	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **SFP Attributes**	Use this page to define academic program information to send to SFP.
Additional Attributes	ACADEMIC_PROG_CAF	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Additional Attributes**	Define academic program Common Attribute Framework (CAF) attribute values. **Note:** This page is available only after adding common attributes for the Academic Program CAF Table attribute record using the CSS_CAF_REC_ATTRIBUTE component.

Describing Academic Programs

Access the Academic Program page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Academic Program**).

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



Field or Control	***Description***
First Term Valid	Enter the first term in which students can be admitted to the academic program. You cannot admit students to the academic program before the term that you specify. If you enter term *0000,* you can admit students to the program for any term. When you convert data to the PeopleSoft system, be sure that you enter a first valid term that is appropriate for the preexisting data of the academic program. This field is optional.
Academic Career	Enter the academic career to which the academic program belongs.

Field or Control	***Description***
Grading Scheme	By default, displays the grading scheme of the academic career. Enter a new value to override the default value. The grading scheme defines all valid grading bases of the academic program. The system applies the grading scheme to classes within the academic program. In addition, the system displays the grading scheme of the academic program in the equivalent fields throughout transfer credit processing whenever credit is transferred into that academic program. When the system converts transfer credit, it uses the grading basis of the lowest definable level.
GB Default for Transfer Credit (grading basis default for transfer credit)	By default, displays the transfer credit default grading basis of the academic career (as defined on the Academic Career Table page). Enter a new value to override the default value. This grading basis appears on various pages for transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grading basis of the lowest definable level.
Default Grade – Transfer Credit	By default, displays the transfer credit default grade of the academic career. Enter a new value to override the default value. This grade appears on various pages throughout transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grade of the lowest definable level.
Academic Group	Enter the academic group to which the academic program belongs. PeopleSoft Student Financials uses academic groups for tuition calculation. The academic group value does not indicate sole ownership of the academic program by the academic group. Define ownership for reporting and financial analysis purposes on the Taxonomy/Campus page of this component.
Academic Level Rule	Enter the academic level rule for the academic program. This rule defines how the system calculates the academic level for students who are in the academic program.
Academic Calendar	Enter the academic calendar for the academic program. The system uses the academic calendar that you enter to determine many of the important dates associated with the academic program.
Dual Academic Program	Enter the second academic program, if the academic program is a joint program (such as J.D./M.B.A.). This enables PeopleSoft Recruiting and Admissions to evaluate and accept students into both academic programs with one application.

Field or Control	***Description***
Default Academic Plan	Enter a default academic plan for the academic program. The system uses the value that you enter as the default academic plan for new applicants to the academic program. The selection appears on the Quick Admit, Recruit Prospective Students, and Application Entry pages.
Default Campus	Enter the default campus for the academic program. The value that you enter appears on the Quick Admit, Create Prospects, and Application components for new applicants to this academic program. Define campuses on the Campus Table page.
Transcript Level	Select a transcript level to determine the types of transcripts on which the system includes the specified data. Values are: *Not Print, Official, Unofficial, Stdnt Life* (student life), and *Degr Prog* (degree progress).
Career Pointer Exception Rule	Enter the career pointer exception rule for the academic program. If the academic program does not have any career exceptions—that is, if enrollments in other careers' courses follow the rules on the Academic Career Pointers page—leave this field empty.
Only if Outside Career	Select to use the career pointer exception rules only against class enrollments that are outside the academic career associated with the academic program. Clear this check box to use the career pointer exception rules against all class enrollments in the academic program.
Residency Required	Select to require residency data for students in the academic program. When you attempt to activate a student into a term, the Term Activation process determines whether a student's academic program requires that the student have residency data in the system. If so and the student does not have residency data in the system, the Term Activation process does not activate the student for the term. This blocks the student from class enrollment and tuition calculation. The value of this check box appears by default, according to the setting of the **Residency Required** field on the Institution 1 page for the academic institution to which the academic program belongs.

Field or Control	***Description***
Financial Aid Eligible	Select to indicate that students in the academic program are eligible for financial aid. This check box works in conjunction with the **Enforce FA Eligibility** (enforce financial aid eligibility) check box on the Statistics Period Type page. The Consolidate Academic Statistics process uses these check boxes to determine which students to include in calculations. For example, if the academic program belongs to a continuing education or nondegree academic career and you want to exclude students within the academic program from the process calculations, clear the **Financial Aid Eligible** check box on this page and select the **Enforce FA Eligibility** check box on the Statistics Period Type page.
Primacy Nbr (primacy number)	Enter the primacy number for the academic program. The system uses this number as a key to determine a student's primary academic program when you consolidate academic statistics. The system also uses this number to prioritize financial aid applications when students are enrolled in multiple academic programs at the same time. The lowest number takes precedence. **Note:** It is recommended that you coordinate the numbering with Financial Aid to avoid conflicts.
Last Prospect Date	Enter the latest date that a program can be populated for a new prospect record. You cannot assign a program to a prospect if the system date is greater than the last prospect date.
Last Admit Term	Enter the last term in which students can be admitted to the academic program. You cannot admit students to the academic program after the term that you specify. The system will compare the admit term used in the student's application to this last term valid value. If the admit term is greater than this value, the program is not available to the user. This field is optional.

Field or Control	*Description*
Edit Advisors Against	Select the view that the system uses when prompting you to assign an advisor for a student in the academic program. Assign advisors to students on the Student Advisor page. If you are defining a new academic program, the system displays the value from the corresponding field on the Academic Career Table page. The option that you select appears by default on the Student Milestone page and the Student Advisor page. Options are: • *Personal Data:* Prompts against all people with a personal data record in the PeopleSoft system. • *Instructor Advisor:* Prompts against all people defined as instructors and advisors on the Instructor/Advisor Table page, as defined for the academic program. • *Advisor Role:* Prompts against all people defined as advisors on the Instructor/Advisor Table page, as defined for the academic program.

Related Links

Understanding Academic Calendars

Setting Up Academic Standing Parameters for Academic Programs

Access the Standing/Honors page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Standing/Honors**).

Related Links

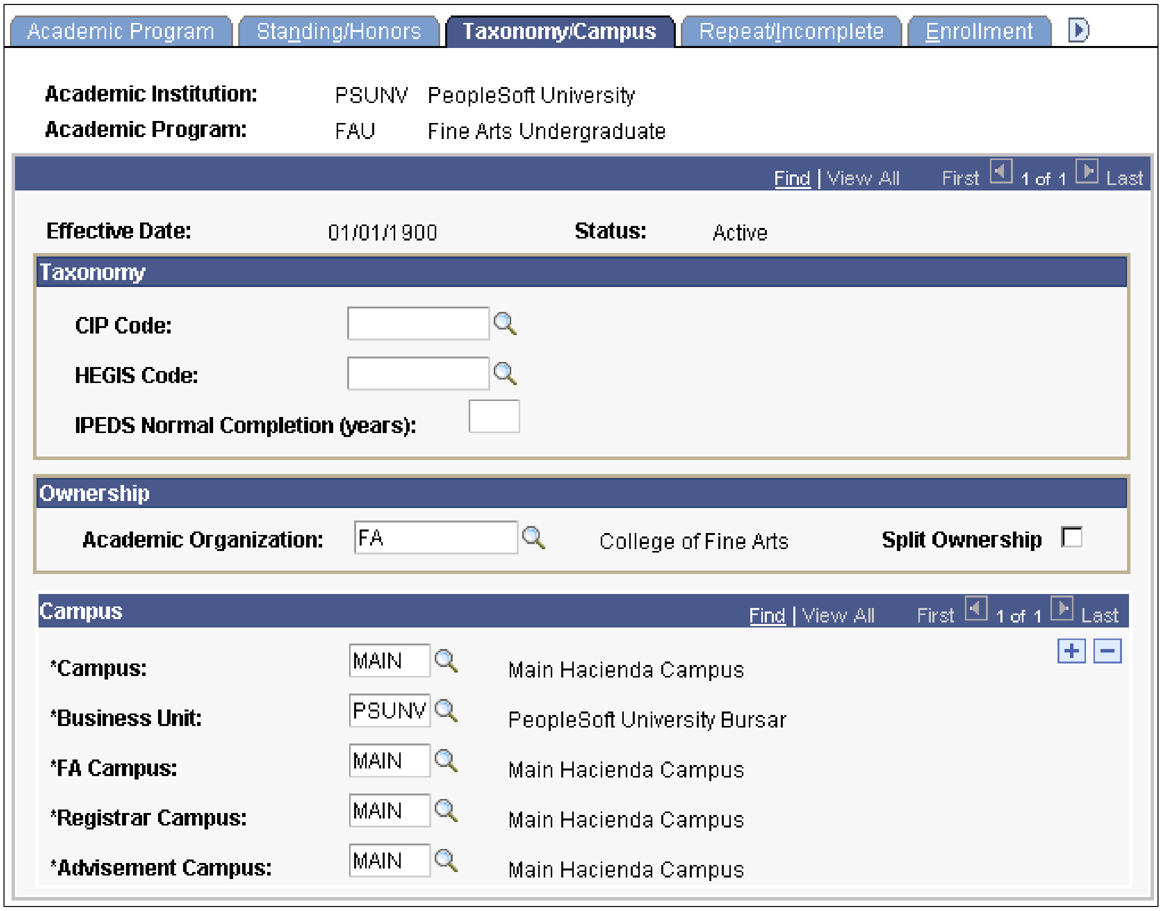
"Setting Up Honors and Awards" (Student Records)

"Linking Academic Standing, Honors, and Awards Rules to Academic Programs" (Student Records)

Setting Taxonomy, Academic Organization Ownership, and Campus Information for Academic Programs

Access the Taxonomy/Campus page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Taxonomy/Campus**).

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



Taxonomy

Field or Control	***Description***
CIP Code (Classification of Instructional Programs code)	Enter the CIP code for this academic program.
HEGIS Code (Higher Education General Information Survey code)	Enter the HEGIS code for this academic program.
IPEDS Normal Completion (years) (Integrated Postsecondary Education Data System normal completion years)	Enter the number of years it normally takes a student to complete this academic program.

Ownership

Field or Control	*Description*
Academic Organization	Enter the academic organization that offers courses in the academic program. Any academic organization entered here should also have a detail node associated with it for this academic program on the academic organization tree. Define academic organizations on the academic organization tree.
Split Ownership	Select to designate multiple academic organization owners for this academic program. If you select this check box, the lower **Academic Organization** field and the **Percent Owned** field become available.

Campus

Field or Control	*Description*
Campus	Enter a primary campus for the academic program.
Business Unit	Enter the business unit (for bursar purposes) for the academic program. Define business unit values on the SF Business Unit Table page.
FA Campus (financial aid campus)	Enter the campus responsible for administering the academic program's financial aid. The system displays values from the Campus Table page.
Registrar Campus	Enter the campus responsible for student records within the academic program. The system displays values from the Campus Table page.
Advisement Campus	Enter the campus responsible for student advising within the academic program. The system displays values from the Campus Table page.

Note: You can add multiple campuses to any field on this page by inserting a new row.

See *PeopleTools: Tree Manager*

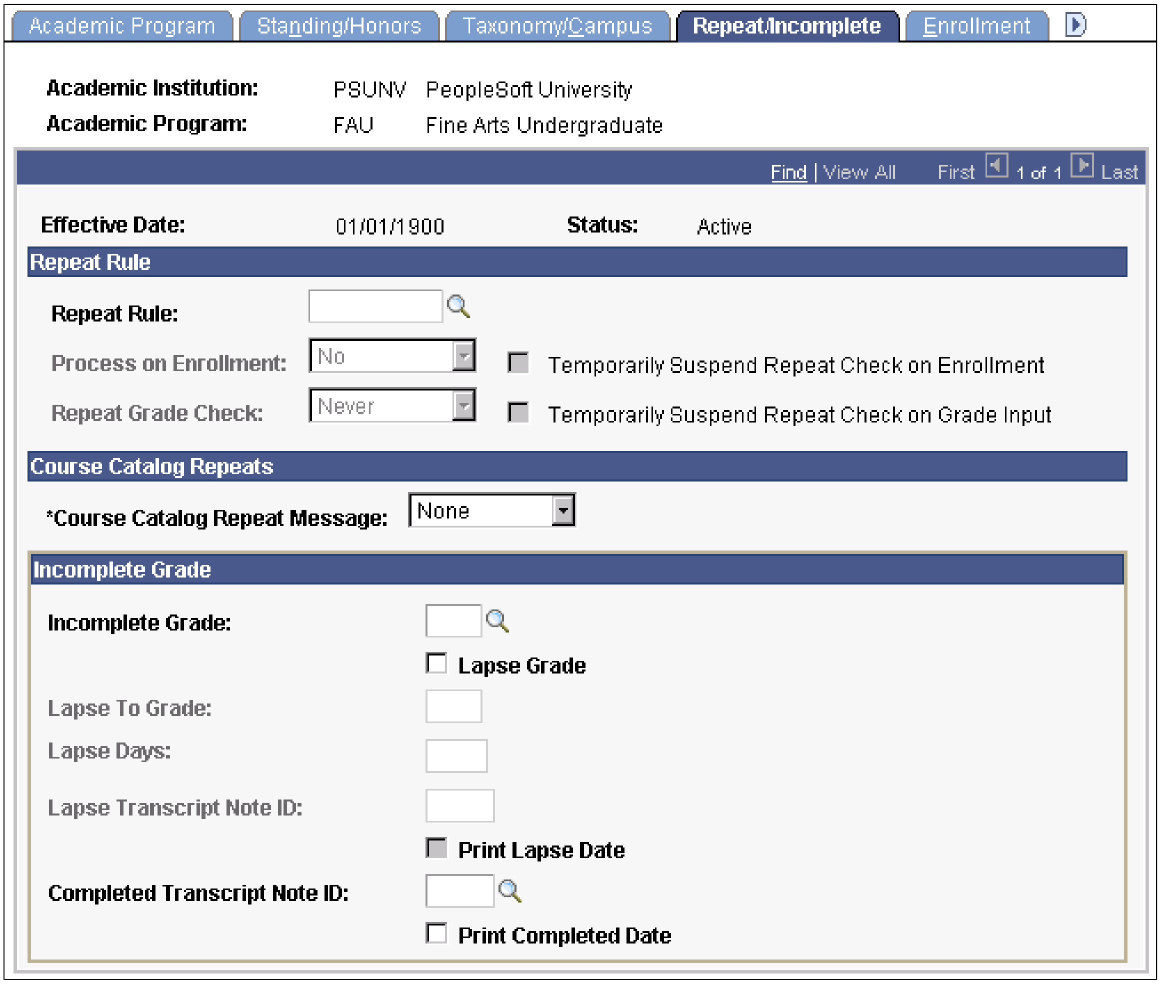
Related Links

Securing Academic Organizations

Defining Repeating Rules and Grade Lapse Rules for Academic Programs

Access the Repeat/Incomplete page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Repeat/Incomplete**).

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



Repeat Rule

Field or Control	***Description***
Repeat Rule	Enter a repeat rule for this academic program. The system prompts you with valid choices according to the academic career to which this academic program belongs. Repeat rules contain the conditions that define repeat checking policies. For example, the repeat rule can specify how many times a student can take courses given certain conditions, such as the grades that the student earns. Settings at the academic career level are defaults for all of the academic programs within this academic career wherein a repeat rule is not attached to the academic program. Repeat rules must be assigned to an academic career for the Repeat Checking process to function at grade input.
Process on Enrollment	Use this field to activate the Repeat Checking process at enrollment time for this academic program. The choices are *Yes* and *No*. Select *Yes* if you want the Repeat Checking process to run during enrollment for this academic program. This is a front-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is front-end because it checks for repeats at enrollment time, rather than when you post grades. You can run the Repeat Checking process for the entire academic institution, for students in particular academic careers within the academic institution, and for students in primary academic programs within academic careers. This field is unavailable if *No* is selected at the academic career or academic institution levels. Enter*No* if you do not want the Repeat Checking process to run during enrollment processing for students in this academic program. This field is unavailable when you select *No* at the academic career or academic institution level.

Field or Control	***Description***
Repeat Grade Check	Use this field to activate or deactivate the Repeat Checking process upon grade submission on the Enrollment Request page or the Quick Enrollment page for this academic program. Select one of the following values: *All Crse:* Select to run the Repeat Checking process upon grade submission on the Enrollment Request page for this academic program. This back-end process checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is back-end because it checks for repeats when you post grades, after the student has already completed the class, rather than at enrollment time. You can run the Repeat Checking process for the entire academic institution, for academic careers within the academic institution, and for academic programs within academic careers. This field is unavailable if *Never* is selected at the academic institution levels. *Never:* Select if you do not want the Repeat Checking process to run upon grade submission on the Enrollment Request page. This field is unavailable when you select*Never* at the academic career or academic institution level. *Only Rep* (only repeats): Select if you want to run the process against all class enrollments in a student's enrollment record (STDNT_ENRL table) where the repeat candidate field is set to Y. The only time that the system does not set the repeat candidate field to Y is for class enrollments entered through the Enrollment component or for classes for which the course is defined as an allowable repeat through the Course Catalog component.
Temporarily Suspend Repeat Check on Enrollment (temporarily suspend repeat checking on enrollment)	Select to temporarily suspend the Repeat Checking process at enrollment time for students in this academic program. This check box enables you to temporarily suspend repeat checking during peak enrollment periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to re-enable the Repeat Checking process on enrollment. Use this functionality sparingly, because students attempting to repeat a class are not warned about a possible illegal repeat.

Field or Control	***Description***
Temporarily Suspend Repeat Check on Grade Input (temporarily suspend repeat checking on grade input)	Select to temporarily suspend the Repeat Checking process during grade input for this academic program. This check box enables you to temporarily suspend repeat checking during peak grading periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to re-enable the Repeat Checking process on grade input. Use this functionality sparingly, because the system does not check for repeats, so you will not know if any repeat rules apply to students until you run the Repeat Checking process in batch.

Course Catalog Repeats

Field or Control	***Description***
Course Catalog Repeat Message	Select one of the following message types that the system displays during enrollment when the Allowable Repeats process detects that the student has previously taken the course. *Error:* Issues an error and prevents the student from enrolling in the repeated class. *Warning:* Issues a warning that the repeatable limit as established on the course catalog has been exceeded. The student is still able to enroll in the class. *None:* Issues no warning or error, and the student is still able to enroll in the class. The Allowable Repeats process runs at class enrollment time and looks at settings at the course catalog level to see whether a course can be repeated. This process does not affect student statistics; it is used only to determine whether a student can repeat a course. When the completions maximum or units maximum has been exceeded, the system issues enrollment messages, depending on the message type entered and assuming that the Course Catalog Repeats functionality is in effect. The system renders the **Course Catalog Repeat Message** field unavailable when you enter *Yes* in the **Process on Enrollment** field. The system renders the field unavailable because when you run the Repeat Checking on Enrollment process, the Allowable Repeats process does not issue a message when a repeated course is in violation of the course catalog repeat maximums. The Repeat Checking process analyzes the student's enrollment records for repeated courses and issues warnings only after the Allowable Repeats process identifies an enrollment that exceeds the completions maximum or units maximum set on the Catalog Data page of the Course Catalog component.

Incomplete Grade

This page allows you to define grade lapse rules for academic programs. Enter all of the grade lapse rules necessary to instruct the system how students' incomplete grades should lapse when you run the Grade Lapse report process and what transcript notes, if any, the system displays on a student's transcript.

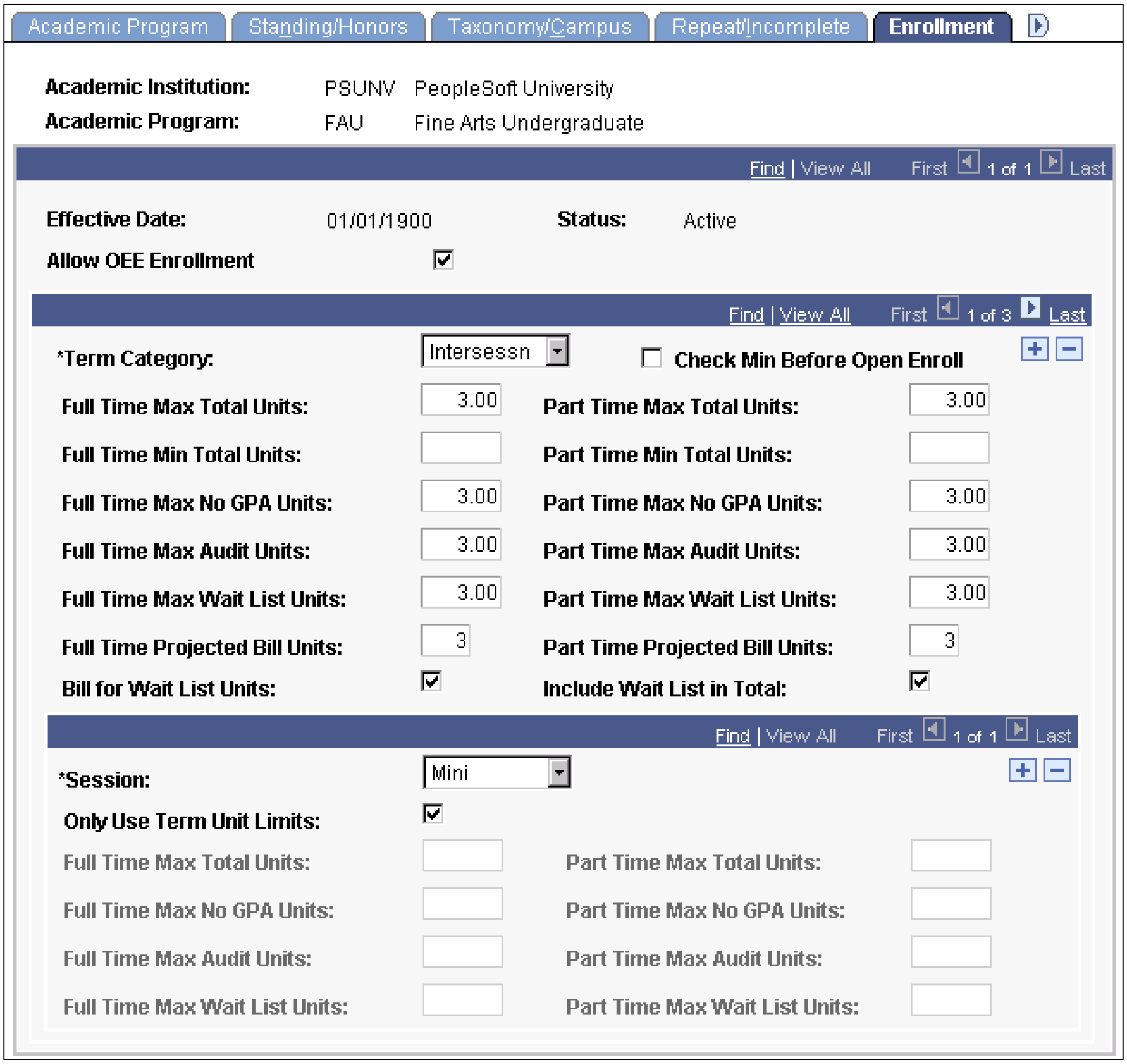
Related Links

“Running the Grade Lapse Process” (Student Records)
“Setting Up Repeat Checking for Academic Programs” (Student Records)

Setting Up Term Enrollment Limits for Academic Programs

Access the Enrollment page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Enrollment**).

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



When checking enrollment unit limits, the enrollment engine first checks the term limits of the academic program (as defined here). If the student meets the enrollment unit limits for the term, then the enrollment engine checks the enrollment limits for the session (as defined on the Session page of the Academic Program Table component), if units limits were defined for the session. If the student meets the enrollment limit requirements for the session (or if no limits were defined for the session), the enrollment engine checks the enrollment unit limits for the appointment, if the open enrollment date has not been reached. Appointment enrollment unit limits only apply before the open enrollment period.

The full-time limits and part-time enrollment limits that you set on this page apply to students approved for a full-time or part-time academic load in the specified academic program and term category.

Field or Control	Description
Term Category	Select the term category for the default term enrollment limits of the academic program. You can modify these translate values. **Note:** You link term category values to actual terms and academic careers on the Term Table page.
Check Min Before Open Enrollment (check minimum before open enrollment)	Select to enable the enrollment engine to verify enrollment requests against the minimum unit amounts set *before* the open enrollment date. Set the open enrollment date on the Session Table page.
Full Time Max Total Units (full-time maximum total units) and **Part Time Max Total Units** (part-time maximum total units)	Enter the maximum number of units that full-time and part-time students can have for the specified term category within the academic program. If you select the **Include Wait List in Total** check box on this page, the enrollment engine calculates the student's total units by adding the units taken (UNT_TAKEN) for rows in the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) or *W* (waiting). If you clear the check box, the enrollment engine includes only the units taken for rows where the student enrollment status equals *E*.
Full Time Min Total Units (full-time minimum total units) and **Part Time Min Total Units** (part-time minimum total units)	Enter the minimum number of units that full-time and part-time students can have for the specified term category within the academic program. The enrollment engine references this value only when a student attempts to drop a class or make a unit adjustment for a class. To calculate the student's total units, the enrollment engine adds the units taken (UNT_TAKEN) for rows in the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment).
Full Time Max No GPA Units (full-time maximum non-grade point average units) and **Part Time Max No GPA Units** (part-time maximum non-grade point average units)	Enter the maximum number of units that full-time and part-time students can have with a non-GPA grading basis for the specified term category within the academic program. This number includes the maximum audit units. To calculate the student's total non-GPA units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) and the include in GPA (INCLUDE_IN_GPA) flag equals *N* (no).

Field or Control	***Description***
Full Time Max Audit Units (full-time maximum audit units) and **Part Time Max Audit Units** (part-time maximum audit units)	Enter the maximum number of non-GPA units that full-time and part-time students can have with an audit grading basis for the specified term category within this academic program. This number is part of the maximum non-GPA units. To calculate the student's total audit units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) and the audit grade basis (AUDIT_GRADE_BASIS) flag equals *Y* (yes).
Full Time Max Wait List Units (full-time maximum wait list units) and **Part Time Max Wait List Units** (part-time maximum wait list units)	Enter the maximum number of wait list units that full-time and part-time students can have in the specified term category within the academic program. Wait list units are any combination of graded, non-GPA, and audit units. To calculate the student's total wait list units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *W* (waiting).
Full Time Projected Bill Units and **Part Time Projected Bill Units**	Enter the number of units that the system uses to calculate projected tuition for billing before the completion of enrollment for full-time and part-time students in the term category within the academic program.
Bill for Wait List Units	Select to include wait list units in tuition calculations.
Include Wait List in Total	Select to have the enrollment engine include wait list units when calculating a student's full-time and part-time maximum total units. Clear this check box to enable a student to have up to the maximum wait list units regardless of maximum total units. **Note:** This check box affects only full-time and part-time maximum total units for the term. It *does not* affect session or appointment enrollment limits.

Examples of Term Enrollment Limits

Suppose that the Liberal Arts Undergraduate (LAU) program at PeopleSoft University (PSUNV) limits full-time student enrollment into regular terms, as shown in this table:

Field	***Value***
Full Time Max Total Units	*18*

Field	*Value*
Full Time Max No GPA Units	*6*
Full Time Max Audit Units	*3*
Full Time Max Wait List Units	*6*
Include Wait List in Total	*Y*

A full-time student can enroll in a maximum of 18 units for the term. Of these 18 units, six can be non-GPA units. Of the six non-GPA units, three can be audit units. Suppose that a student has the maximum of six wait list units and has yet to enroll in any units. Because the Include Wait List in Total check box is selected, the student can enroll in 12 additional units before reaching the maximum total units. Of these 12 units, six can be non-GPA units. Of the six non-GPA units, three can be audit units.

The Fine Arts Undergraduate (FAU) program at PSUNV limits part-time enrollment into these regular terms:

Field	*Value*
Part Time Max Total Units	*11*
Part Time Max No GPA Units	*3*
Part Time Max Audit Units	*3*
Part Time Max Wait List Units	*6*
Include Wait List in Total	*N*

A part-time student can enroll in a maximum of 11 units for the term. Of these 11 units, three can be non-GPA units. Of the three non-GPA units, three can be audit units. Suppose that a student enrolls in eight units. Because the Include Wait List in Total check box is cleared, the student can enroll in an additional three units maximum. Of these three units, three can be non-GPA units. Of the three non-GPA units, three can be audit units. The student can also add six additional wait list units.

Related Links

“Understanding Enrollment and Validation Appointments” (Student Records)

Setting Up Course Count Limits for Academic Programs

Access the Course page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Course**).

The enrollment engine uses these enrollment limits in addition to the unit limits when determining whether a student can enroll in a course. Define course count enrollment limits for specific course offerings on the Catalog Data page of the Course Catalog component.

Field or Control	***Description***
Course Count Enrollment	Select to activate course count processing for class enrollment in the academic program. If you select the **Only Use Term Unit Limits** check box on the Session page, the session type fields are unavailable. Otherwise, all fields on this page are available.
Min Course Count to Count (minimum course count to count)	If applicable, enter the minimum course count value that a course must be worth to count towards the total full-time and part-time maximum course counts. For example, if you indicate that a course must meet a minimum course count value of 0.50, then a course's count value must be greater than or equal to 0.50 to count towards the full-time maximum course and part-time maximum course limits.
Full Time Max Courses (full-time maximum courses (upper)	Enter the full-time maximum course counts for students enrolling in classes within the specified term category of the academic program.
Part Time Max Courses (part-time maximum courses (upper))	Enter the part-time maximum course counts for students enrolling in classes within the specified term category of the academic program. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.
Full Time Max Courses (full-time maximum courses (lower))	If you set specific session unit limits for this term category on the Session page, the **Full Time Max Courses** field and **Part Time Max Courses** field become available. Enter the full-time maximum course counts for students enrolling in classes within the session type of the specified term category.
Part Time Max Courses (part-time maximum courses (lower))	Enter the part-time maximum course counts for students enrolling in classes within the session type of the specified term category. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.

Setting Up Dynamic Date Fields for Academic Programs

Access the Dynamic Date page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Dynamic Date**).

Note: For students within a specified academic program to be able to drop or withdraw from open entry/exit classes, you must define the values on this page.

This page is available only if you enable the use of the Dynamic Class Dates features on the Academic Career Table 2 page. When you apply a dynamic class date rule to a class or OEE enrollment, the system uses the student's primary academic program to control the reasons and penalties when a student cancels, withdraws from, or drops a class. These reasons and penalties relate to the corresponding landmark date deadlines on the dynamically calculated academic calendars. They apply to students according to the academic program and according to the dynamic class date rule of a class. You set up the dynamic class date rules on the Dynamic Class Dates page. You view and override the calculated deadlines for the regular dynamic class date rules on the Dynamic Data page and for OEE dynamic date rules on the Student OEE Enroll (student open entry/exit enrollment) page.

When processing drops or withdrawals for dynamically dated classes during the penalty periods, the enrollment engine uses the penalty grades specific to the student's grading basis, as defined on the Grading Scheme Table page. If you have not defined penalty grades for the student's grading basis, the enrollment engine instead uses the grading bases and grades that you define for the student's primary academic program.

Dynamic Date Fields

Field or Control	***Description***
Cancel Reason	Enter the enrollment action reason that applies to a student's enrollment record when the student cancels a dynamically dated class on or before the cancel-date deadline. You can modify these translate values.
Withdraw without Penalty Reason	Enter the enrollment action reason that applies to a student's enrollment record when the student withdraws from or drops a dynamically dated class after the cancel deadline but on or before the withdraw-without-penalty deadline. You can modify these translate values.
Withdraw with Penalty Grade Basis	Enter the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. Set up grading basis values on the Grading Scheme Table page. The grading basis that you enter determines the grades available in the **Withdraw With Penalty Grade** field.
Withdraw with Penalty Grade	Enter the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline.

Field or Control	***Description***
Withdraw with Greater Penalty Grade Basis	Enter the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline. The grading basis that you select determines the grades available in the **Withdraw With Greater Penalty Grade** field.
Withdraw with Greater Penalty Grade	Enter the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline.
Drop without Penalty Reason	Enter the enrollment action reason that applies to a student's enrollment record when the student drops from a dynamically dated class after the drop-and-delete deadline but on or before the drop-and-retain-record deadline. You can modify these translate values.
Drop with Penalty Grade Basis	Enter the grading basis that determines a student's grade when the student drops a dynamically dated class after the drop-and-retain-record deadline but on or before the drop-with-penalty deadline. The grading basis that you select determines the grades available in the **Drop With Penalty Grade** field.
Drop with Penalty Grade	Enter the grade that applies to a student's enrollment record when the student drops a dynamically dated class after the drop-and-retain-record deadline but on or before the drop-with-penalty deadline.
Drop with Greater Penalty Grade Basis	Enter the grading basis that determines a student's grade when the student drops a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline. The grading basis that you select determines the grades available in the **Drop With Severe Penalty Grade** field.
Drop with Severe Penalty Grade	Enter the grade that applies to a student's enrollment record when the student drops a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline.

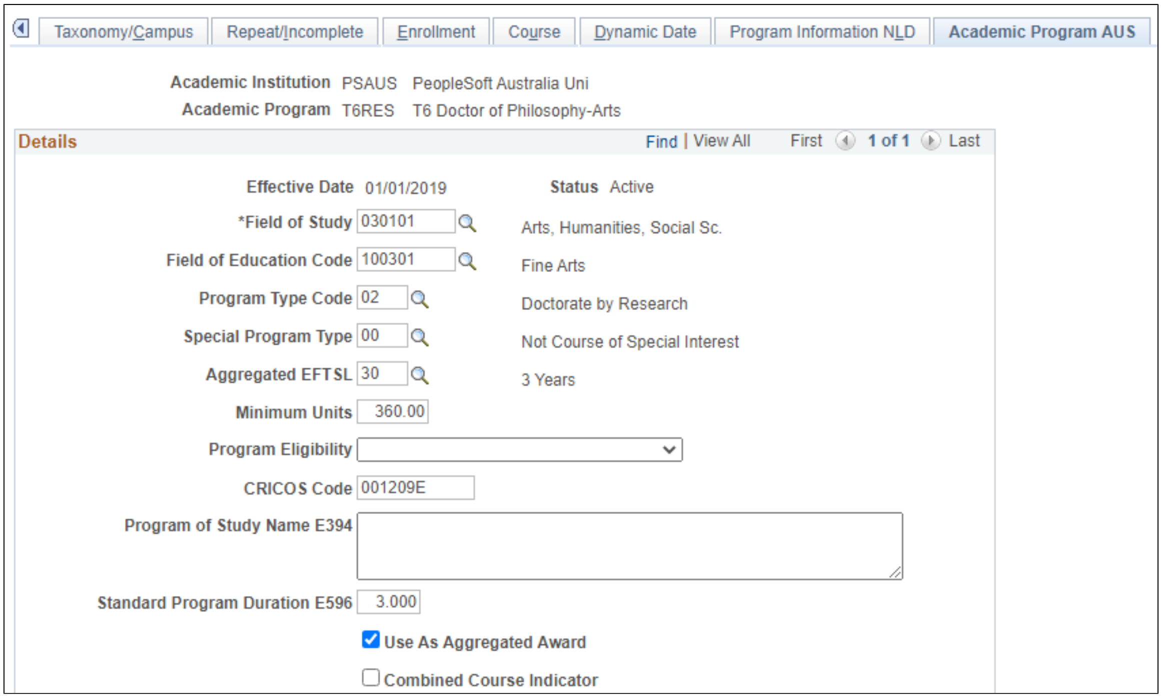
Related Links

“Defining Grading Schemes” (Student Records)

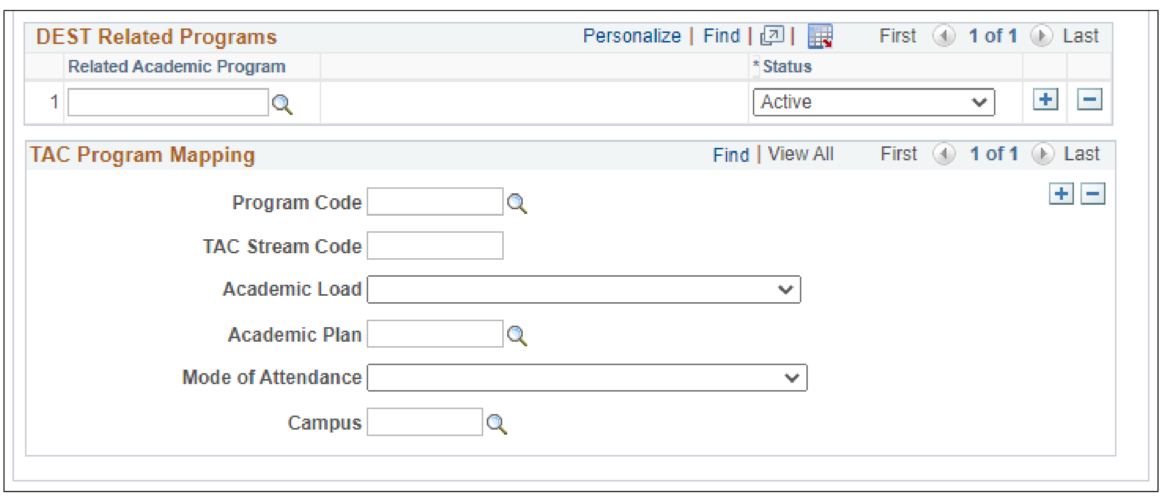
(AUS) Setting Up Australian Academic Programs

Access the Academic Program AUS page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Academic Program AUS.**).

This example illustrates the fields and controls on the Acad Prog AUS 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 Acad Prog AUS page (2 of 2). You can find definitions for the fields and controls later on this page.



Additional Elements

Field or Control	***Description***
Field of Study	Enter the field of study that most closely matches the academic program. Define field of study codes on the Field of Study AUS page. **Note:** Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference.
Field of Education Code	Enter the field of education that most closely matches the academic program. Define field of education codes on the Field of Education AUS page.
Program Type Code	Enter the program type code for this academic program. Define program type codes on the Program Type Table page.
Special Program Type	Enter a special program type, if applicable. Special programs are programs that are of special interest to Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) - previously DEEWR and before that, DEST.
Aggregated EFTSL (aggregated Equivalent Full Time Student Load)	Enter the aggregated EFTSL value for this academic program. This is the sum of all the EFTSL values needed to fulfil the requirements of the program. For example, a three-year program has a total EFTSL value of 3 and the aggregated EFTSL value is 30. Define aggregated EFTSL values on the Aggregated EFTSL AUS page.
Minimum Units	Enter the minimum units needed to satisfy the requirements of this academic program. For example, if 120 units a year is a full-time load for a bachelors program, the minimum units would likely be 360. The Student Enrolment DIISRTE report (srdesten.sqr) uses this field in determining percentage of transfer credit for students.
Program Eligibility	Select to indicate whether the student is eligible or ineligible to participate in the Postgraduate Education Loan Scheme (PELS) program.

Field or Control	Description
CRICOS Code	Enter the seven-digit CRICOS code that you want to associate with this academic program. The CRICOS code is used by the Department of Immigration to identify valid programs for international students. This code is not related to DIISRTE.
Program of Study Name E394	Enter the full name of a course of study. This is used in generating reports and must be as meaningful as possible.
Standard Program Duration E596	Enter the standard duration of the course of study.
Use as Aggregated Award	Select to indicate that the program is reported as an aggregated award. Students are awarded with a TCSI aggregate award and course admission, or related unit enrollments aren't reported for this student program.
Combined Course Indicator	Select to indicate that this academic program is a combined course, such as Arts/Law. When you select this check box, the **Supplementary FOS** and **Supplementary FOE** fields become available.
Supplementary FOS (supplementary field of study)	If this program is a combined course, enter the secondary field of study. This field is available if you select the **Combined Course Indicator** check box. **Note:** Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference.
Supplementary FOE (supplementary field of education)	If this program is a combined course, enter the secondary field of education. This field is available if you select the **Combined Course Indicator** check box.

DEST Related Programs

Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) was previously known as DEEWR and before that as DEST.

Field or Control	***Description***
Related Academic Program and **Status**	Enter the related programs for this academic program. DIISRTE uses related program information to determine the commencement date (DIISRTE element 328) of a student's program. For example, if a student was enrolled into a masters program and then one year later changes to a graduate program, DIISRTE might consider these related programs. If DIISRTE defines two programs as related, the determination of the commencement date for the student's program should be from the admit term of the masters program, in our example, and not the admit term of the graduate program. You should add all related programs for each academic program.

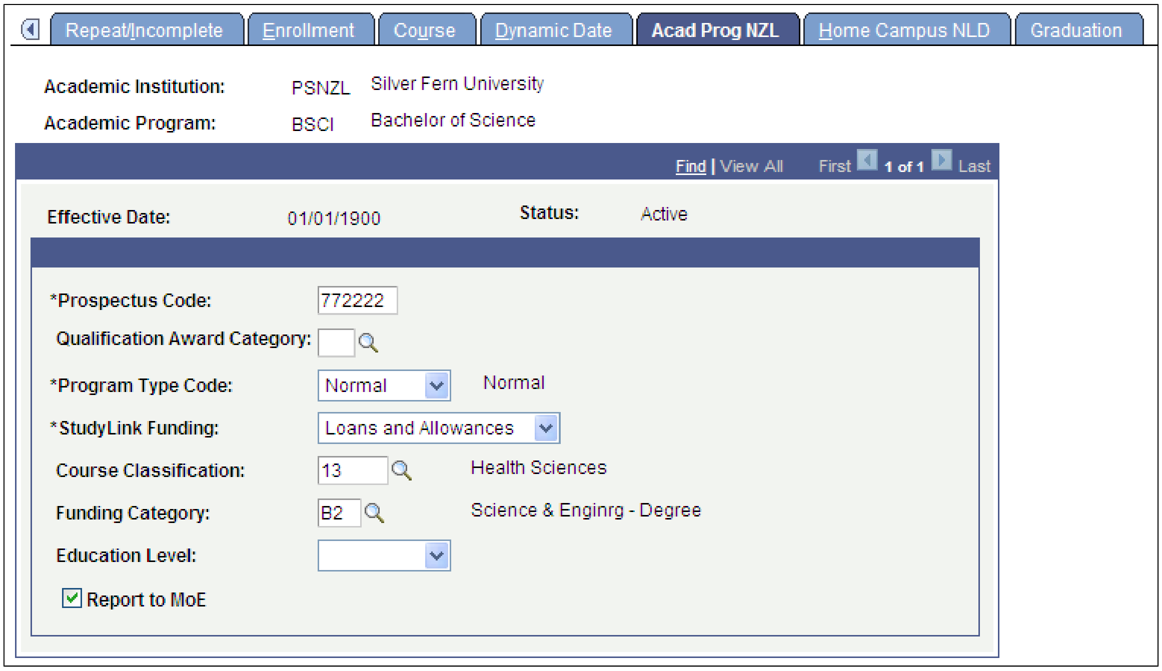
TAC Program Mapping

Field or Control	***Description***
Program Code	Enter the appropriate program code for this academic program. This field is used for the Training Accreditation Council (TAC) Bulk Upload and is not related to DIISRTE. Program codes are set up on the Program Code Table AUS page.
TAC Stream Code	Enter the appropriate TAC stream code for this academic program. This field is also used for the TAC Bulk Upload and is not related to DIISRTE.
Academic Load	Select the appropriate academic load. Values are:*Full-time, Part-time, Part-time Vocational TR, Vocational Coaching,* and *Vocational Training.*
Academic Plan	Enter an academic plan to associate with the academic program.
Mode of Attendance	Select the mode of attendance for this academic program. Values are: *External Mode of Attendance, Internal Mode of Attendance, Multi-modal Mode of Attendance, Completed Course - OLAA* (Open Learning Australia), and *Submission of Original Work.*
Campus	Enter the campus associated with this academic program.

(NZL) Setting Up New Zealand Academic Programs

Access the Acad Prog NZL page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Acad Prog NZL**).

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



Field or Control	***Description***
Prospectus Code	Enter the prospectus code for the program. This code is the unique identifier for the program from the Ministry of Education Prospectus database.
Qualification Award Category	(Optional) Select a category from the list of SDR Qualification Award Categories. This value is for informational purposes. Values for this field are delivered as translate values. You can modify these values.
Program Type Code	Select a program type code for the academic program. The New Zealand Ministry of Education requires that you assign all programs a program type code. The system prompts you with translate values delivered with your system. These translate values are defined as valid for the Single Data Return Report and should not be modified. Values are: *CPI* (certificate of personal interest), *Community,* and *Normal.*

Field or Control	***Description***
StudyLink Funding	Select a code to indicate whether a program is eligible for StudyLink funding and, if it is, at which level. Values are: *Allowance Only, Loans Only, Loans and Allowances,* and *Not Funded.*
Course Classification	Enter a course classification. These codes are assigned by the New Zealand Ministry of Education and are required for the Single Data Return. You define these codes in the Course Classification NZL component.
Funding Category	Enter a funding category. These codes are assigned by the New Zealand Ministry of Education and are required for the Single Data Return. Funding categories are tied to course classifications, so the course classification selected determines the available selections in this field. You define these codes in the Funding Category NZL component.
Education Level	No programming is tied to this field; use it for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these values.
Report to MoE	No programming is tied to this field; use it for informational purposes only. The check box is selected by default.

See “Processing SDR Extracts” (Student Records).

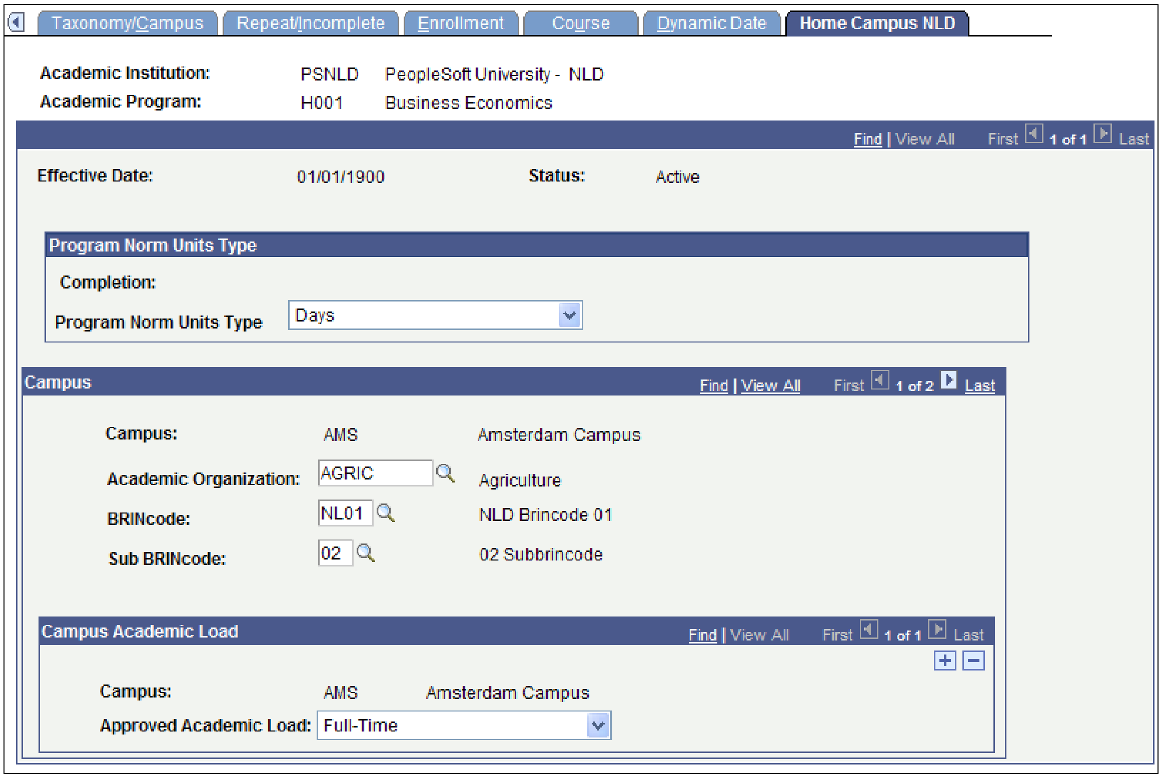
Related Links

“Preparing for SDR Reporting” (Student Records)

(NLD) Setting Up Home Campus Information

Access the Home Campus NLD page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Home Campus NLD.**).

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



Field or Control	***Description***
BRINcode	Enter a BRINcode, which is defined by the Dutch Ministry of Higher Education. You can map only Internal BRINcodes to an academic program.
Sub BRINcode	You can select only those Sub BRINcodes that are mapped to the selected BRINcode. You map a Sub BRINcode to a BRINcode in the SUB-BRINCODE Table page.

Defining Academic Programs for the Advisement Self-Service What-If Scenarios

Access the Advisement page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Advisement**).

You can enable students, advisors, or prematriculated students to generate a what-if advisement report. For example, perhaps a student is considering a change to his or her program of study and wants to run an advisement report that simulates the different (what-if) program. The fields on the Advisement page are for use with the What-If Report – Create What-if Scenario self-service page. If a check box is selected, the respective user can view or select this academic program on the Create What-if Scenario page. The exception to this would be if the program is attached to a career that is not valid for use in the what-if scenario.

You may want advisors to select among many programs and yet you may want to restrict the academic program values that display for a prospective student. For example, a business program may be impacted and require a separate application process so you may not want that program available for a prospective student's selection on the Create What-if Scenario page.

For existing programs, the system selects the check boxes by default. If you add a new program, the system clears the check boxes by default.

Field or Control	***Description***
Show in What-If Advisor	Select to make the academic program available for selection by the advisors when they define a what-if scenario for a student or prematriculated student using the What-If Report – Create What-if Scenario self-service page.
Show in What-If Prematriculated Student	Select to make the program available for selection by the prematriculated students when they define a what-if scenario using the What-If Report – Create What-if Scenario self-service page.
Show in What-If Student	Select to make the program available for selection by the students when they define a what-if scenario using the What-If Report – Create What-if Scenario self-service page.

Related Links

"Setting Up Advisement Report Types" (Academic Advisement)

Defining Academic Institutions

Setting Up SFP Attributes

This page is used to support integration with Oracle Fusion Cloud Student Financial Planning. See "Setting Up Integration with Oracle Fusion Cloud Student Financial Planning" (Campus Community Fundamentals).

Access the Academic Program SFP Attributes page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **SFP Attributes**).

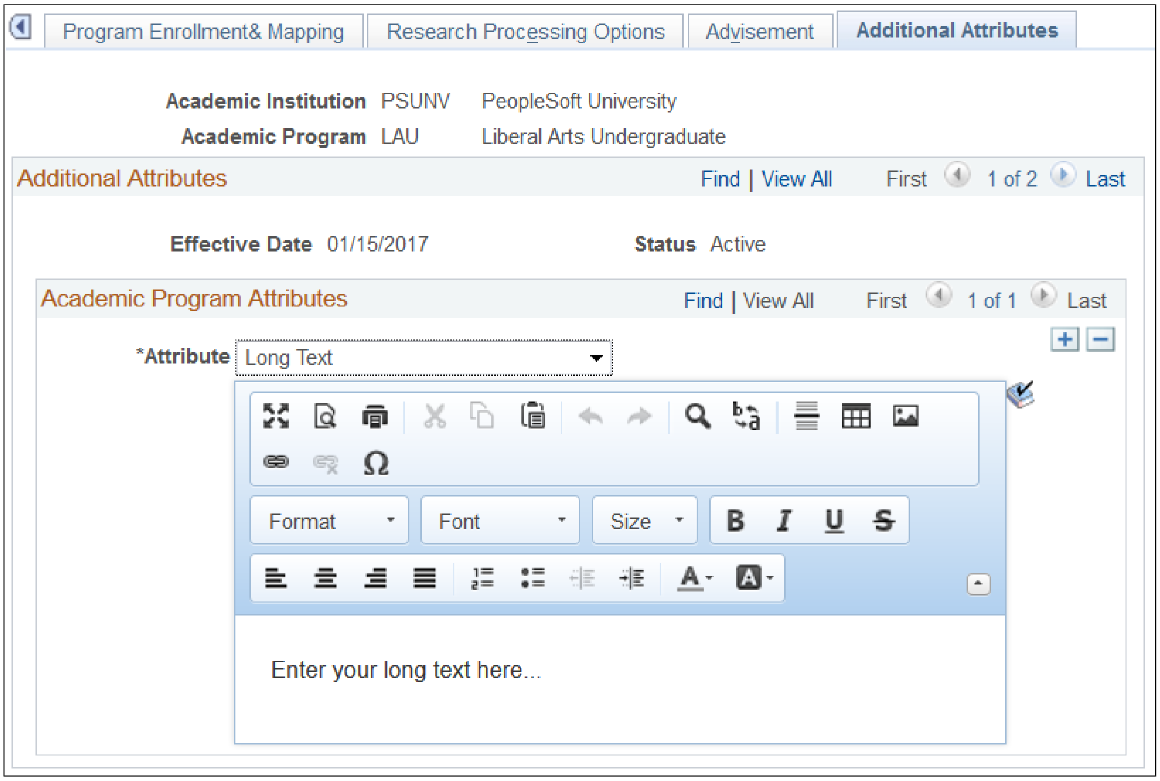
Field or Control	***Description***
Academic Plan Indicator	Select if the Academic Plan SFP Attributes should be used instead of the Academic Program SFP Attributes.
Required GPA	Enter the program GPA required to pass a component of the SAP evaluation.
Program Measurement Unit	Select *Credit* or *Clock*; for Credit Hour or Clock Hour, respectively.

Field or Control	*Description*
Total Required Units	Enter the number of units required to complete the academic program
OPEID	Enter your Office of Postsecondary Education ID. This is required by U.S. Department of Education Common Origination and Disbursement (COD) to report a student's physical campus of attendance as the Enrollment School Code using the 8 digit OPEID codes assigned to your institution.
Academic Year Unit Measurement	Select *Credit* or *Clock*; for Credit Hour or Clock Hour, respectively.
Academic Year Units Required	Enter the number of units required to complete an academic year.
Instructional Weeks Required	Enter the number of instructional weeks required to complete an Academic Year. For Non-Term Programs, the system ensures the student meets the minimum number of instructional weeks before completing the academic year. For Term Programs, you should set the academic terms/years to meet the regulatory minimum.
Borrower Based Term Indicator	Select if the terms in the Student Academic and Financial Information (SAFI) message should *not* be aggregated by regular Academic Year. This must be selected if the **Borrower Based Terms Per Year** field is populated.
Borrower Based Terms Per Year	Enter the number of terms per Borrower Based Academic Year.
Projected Course Label	If left blank, the default value of "Projected Course Enrollment" will be used.

Defining Additional Academic Program Attributes

Access the Additional Attributes page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Program Table** > **Additional Attributes**).

This is an example of an attribute that can be used on the Additional Attributes page.



Use this page to enter and review Common Attribute fields associated with the academic program.

The Academic Program Table CAF record (ACAD_PROG_CAF) is delivered and associated with the Academic Program Table record (ACAD_PROG_TBL).

This page appears only after adding common attributes to the Academic Program CAF Table attribute record using the record context (CSS_CAF_REC_ATTRIBUTE) component.

Note: On the **Record Context** page, you must select the *Inline Subpage* option in the **Attribute Display Type** group box. The other option, *Secondary Page*, is not a supported display type for attributes associated with the Academic Program Table.

See “Defining a Common Attribute” (Campus Community Fundamentals).

See “Associating a Common Attribute to a Record” (Campus Community Fundamentals).

Defining Academic Plans

To set up academic plans, use the Academic Plan Table component (ACADEMIC_PLAN_TBL).

This section provides an overview of academic plans and discusses how to:

- Describe academic plans.
- Set up print options.

- Set up taxonomy.
- Establish academic organization ownership.
- (AUS) Set up Australian academic plans.
- (NZL) Set up New Zealand academic plans.
- Define academic plans for the advisement self-service what-if scenarios.
- Identify any additional Common Attribute Framework attributes for the academic plan.

Understanding Academic Plans

An academic plan is an area of study—such as a major, minor, or specialization—that is within an academic program *or* within an academic career. A student can earn only one degree for a single academic plan. If the institution offers dual degrees, you must establish separate academic plans for each degree or you must create a combined degree, such as B.A./B.S. You can set up academic plans to award degrees, indicate completion of the academic program, or award intermediate certificates or degrees.

Pages Used to Define Academic Plans

Note: For documentation about the Academic Plan – Research Processing Options page, see "Setting Up Research Tracking Options for Academic Plans" (Student Records)

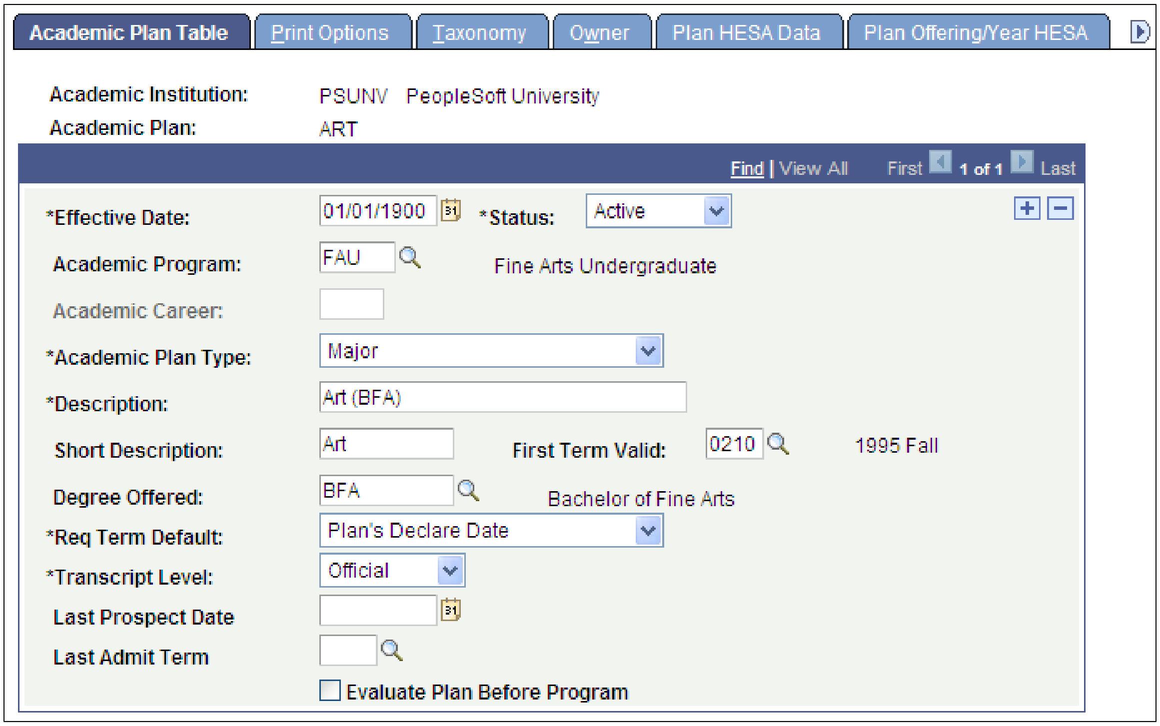
Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Plan Table	ACADEMIC_PLAN_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Academic Plan Table**	Describe academic plans, tie academic plans to an academic program or academic career, specify the degree offered, and provide other details.
Print Options	ACAD_PLAN_PRNT_OPT	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Print Options**	Set up diploma and transcript printing options and text for academic plans.
Taxonomy	ACAD_PLAN_TAXONOMY	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Taxonomy**	Set up academic plan taxonomy, including CIP codes, HEGIS codes, NSC Classification, Field of Study, and SULA information.
Owner	ACAD_PLAN_OWNER	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Owner**	Establish academic organization owners of the academic plan for reporting, analysis, and work distribution purposes.

Page Name	***Definition Name***	***Navigation***	***Usage***
Acad Plan AUS (academic plan Australia)	SSR_ACAD_PLAN_AUS	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Acad Plan AUS**	Assign DIISRTE codes to academic plans.
Acad Plan NZL (academic plan New Zealand)	SSR_ACAD_PLAN_NZL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Acad Plan NZL**	Assign New Zealand Ministry of Education (MoE) and New Zealand Vice-Chancellors' Committee (NZVCC) subject codes to the academic plan for government reporting.
Advisement	SSR_PLAN_TBL_AA	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Advisement**	Identify if you want active students, advisors, and pre-matriculated students to be able to select this academic plan on the What-If Report – Create What-if Scenario (SAA_SS_WHATIF) page.
Additional Attributes	ACADEMIC_PLAN_CAF	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Additional Attributes**	Define academic plan Common Attribute Framework (CAF) attribute values. **Note:** This page is available only after adding common attributes for the Academic Plan CAF Table attribute record using the CSS_CAF_REC_ATTRIBUTE component.
Student Financial Planning (SFP) Attributes	ACADEMIC_PLAN_SFP	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **SFP Attributes**	Define the academic plan attribute values for SFP.

Describing Academic Plans

Access the Academic Plan Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Academic Plan Table**).

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



Warning! If you modified the academic program or academic career to which an academic plan belongs, you must first deactivate the academic plan by inserting a new row and entering the status of *inactive.* Then, you must add another new row to tie the academic plan to a different academic program or academic career. This procedure ensures proper functionality of academic plan prompts throughout the system.

Field or Control	***Description***
Academic Program	Enter the academic program *or* an academic career to which this academic plan belongs. To require that a student be admitted to a specific academic program before declaring the academic plan, enter an academic program to link to this academic plan.
Academic Career	Enter an academic career to link to the academic plan if you want students in any academic career to be able to declare the academic plan. For example, an institution might enable all undergraduates to declare computer science as a major (academic plan), regardless of whether students are in a liberal arts program or an engineering program.
Academic Plan Type	Select a type for this academic plan, such as *Major, Minor,* or *Concentration.* You can modify these translate values.

Field or Control	***Description***
First Term Valid	Enter the first term in which students can be admitted to the academic plan. You cannot admit students to the academic plan before the term that you specify. If you enter the term *0000,* you can admit students to the plan for any term. When you convert data to the PeopleSoft system, be sure that you select a first valid term that is appropriate for the preexisting data for each academic plan. This field is optional. **Note:** Students can modify this plan when their admit term is prior to this term as long as the effective date of the modification is greater than or equal to the start date of this term.
Degree Offered	Enter the degree offered for completion of the academic plan. If the institution offers dual degrees, you must establish separate academic plans for each degree or create a combined degree, such as B.A./B.S. The system creates degree records according to the definition of the academic plan. Therefore, if a student graduates with dual degrees and the degrees are the same—such as an English B.A. and a psychology B.A.—the system creates one degree record. However, if a student graduates with dual degrees and the degrees are different —such as an English B.A. and a biology B.S.—the system creates two degree records, one for each degree.
Req Term Default (requirement term default)	Select the default term for which the system begins accumulating requirements for the academic plan. You can override the default value for individual students on the Student Plan page. Modification to these translate values requires significant programming. **Note:** Set this default so that, when you analyze completion requirements for an academic plan, you know which set of requirements to use. Requirements can change over time.
Transcript Level	Select a transcript level to determine the types of transcripts on which the system includes the specified data. Values are: *Not Print, Official, Unofficial, Stdnt Life* (student life), and *Degr Prog* (degree progress).
Last Prospect Date	Enter the latest date that a plan can be populated for a new prospect record. You cannot assign a plan to a prospect if the system date is greater than the last prospect date.
Last Admit Term	Enter the last term in which students can be admitted to the academic plan. You cannot admit students to the academic plan after the term that you specify. The system will compare the admit term used in the student's application to this last term valid value. If the admit term is greater than this value, then the program is not available to the user. This field is optional.

Field or Control	***Description***
Evaluate Plan Before Program	Select to alter reporting sequences. This check box is a feature of PeopleSoft Academic Advisement.

Related Links

“Changes to Academic Structure Processing” (Academic Advisement)

Setting Up Print Options

Access the Print Options page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Print Options**).

Field or Control	***Description***
Diploma	Select to print a description on the diplomas for students who complete the academic plan. The **Diploma Description** field becomes available.
Transcript	Select to print a description on the transcripts for students with the academic plan. The **Transcript Description** field becomes available.
Diploma Description	Enter the description of the academic plan. This description appears on the diplomas for students who complete the academic plan. The PeopleSoft system currently does not provide a process to print diplomas.
Transcript Description	Enter the description of the academic plan. This description appears on the transcripts for students with this academic plan. You can override this text when you prepare students' transcripts.
Indent	Enter the number of spaces that you want to indent the related description on the printed document.

Related Links

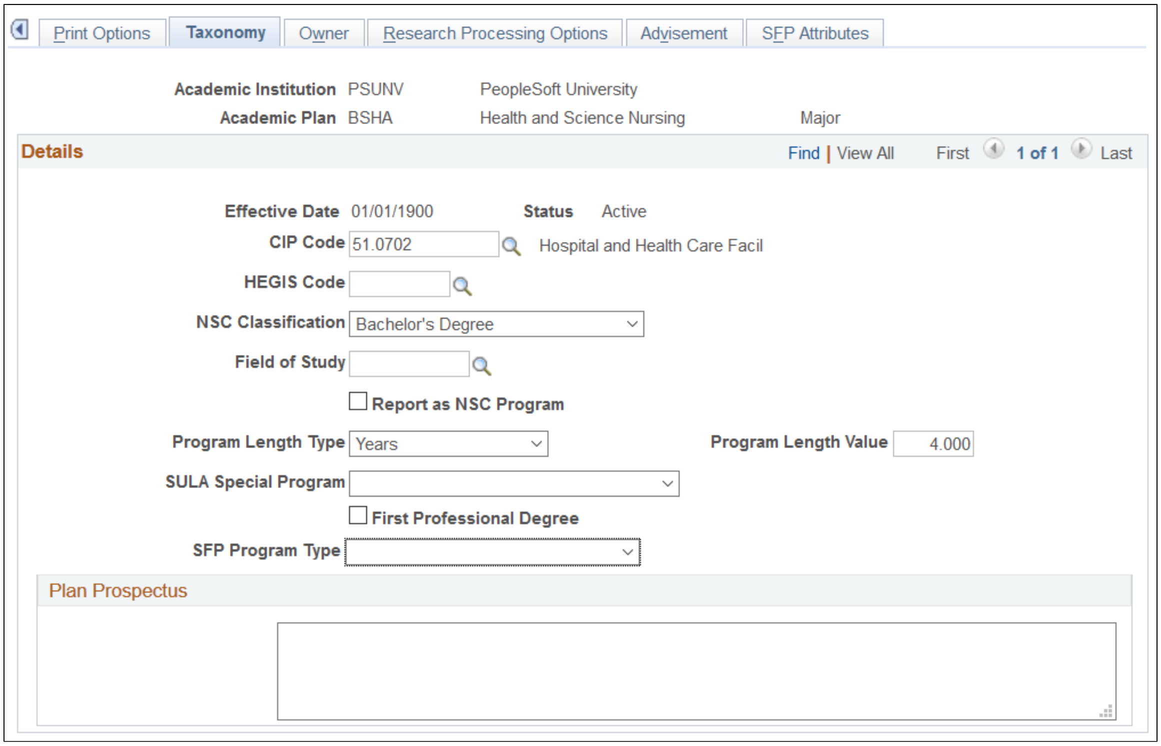
“Processing Transcripts for Individuals or Small Groups of Students” (Student Records)

“Processing Batch Transcripts (Application Engine)” (Student Records)

Setting Up Taxonomy

Access the Taxonomy page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Taxonomy**).

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



Note: For National Student Clearinghouse (NSC) reporting, program level data is sourced from the Academic Plan Table. You must enter a value in the following fields: **CIP Code, NSC Classification, Program Length Type, Program Length Value,** and **SULA Special Program.**
See:
"Setting Up For NSC Program Level Reporting" (Student Records)
"Understanding Consolidate Academic Statistics Process Calculations" (Student Records)
"Producing NSC Extracts" (Student Records)

Field or Control	*Description*
CIP Code (Classification of Institutional Programs code)	Enter the CIP code for this academic plan. CIP codes are delivered with the system as translate values. You can modify CIP codes on the CIP Code Table page.
HEGIS Code (Higher Education General Information Survey code)	Enter the HEGIS code for this academic plan. HEGIS codes are delivered with the system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.

Field or Control	***Description***
NSC Classification (National Student Clearinghouse Classification)	Enter a NSC Classification. NSC Classification values are delivered with the system as translate values. The system uses this value to derive a Class/Credential Level for each student in the NSC enrollment extract. **Note:** If you enter a value of *Bachelor's Degree* here, you must also enter a value (for example Sophomore) in the NSC Level Category field on the Academic Level Table page. See Defining Academic Level and Load Rules.
Field of Study	Enter a field of study for the academic plan.
Report as NSC Program	Select to identify a plan as one that should be reported as a program for NSC reporting purposes. When this check box is selected, all related NSC fields (CIP Code, NSC Classification, Program Length Type/Value, SULA Special Program) must have values.
Program Length Type	Select the unit of time you want to use to define the Program Length: Weeks, Months, or Years.
Program Length Value	Enter the number of weeks, months, or years for the length of the Program.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>SULA Special Program (Subsidized Usage Limit Applies special program)</td><td>Select a SULA Special Program. Values include:
• 2-year Bachelor's Degree (two-year bachelor's degree) – A bachelor's degree program that requires an associate degree or the successful completion of at least two years of postsecondary coursework as a prerequisite for admission into the program.
• Non-Cred Teacher Cert Pgm (non-credential teacher certification program) – A program that does not lead to a degree/certificate at an institution but leads to a State credential required for teaching.
• Not Applicable – Not applicable.
• Prep Crsewk Grad Prof Pgm (preparatory coursework graduate program) – Enrollment in preparatory coursework necessary for enrollment in a graduate or professional program.
• Prep Crsewk Ugrad Program (preparatory coursework undergraduate program) – Enrollment in preparatory coursework necessary for enrollment in an undergraduate or professional program.
• Selective Admission Assoc Degree (selective admission associate degree) – An associate’s degree program that:
1. Requires an associate degree or the successful completion of at least two years of postsecondary coursework as a prerequisite for admission.
2. Admits only a selected number of applicants based on additional competitive criteria which may include entrance exam scores, class rank, grade point average, written essays, or recommendation letters.
3. Provides the academic qualifications necessary for a profession that requires licensure or certification by the State in which the coursework is offered.

Note: If this field is left blank, and the corresponding field is also blank in on a student’s FA Term record, then the field on the student’s FA Term is populated in the following ways:
1. FA Term Build (online and batch) populates this field as "Not Applicable".
2. The SULA Application Engine Request process populates this field as "Not Applicable".
3. Manual updates to the FA Term > Statistics page auto-populate this field as "Not Applicable".

See “Setting Up 150 Percent Direct Subsidized Loan Limit (SULA)” (Financial Aid).</td></tr>
</table>

Field or Control	*Description*
First Professional Degree	If selected, the SAFI element `FirstProfessionalDegreeIndicator` is true. This field is reserved for SFP integration.
SFP Program Type	Select to identify the COD Credential Level for the SAFI element `ProgramType`. This field is reserved for SFP integration.
Plan Prospectus	Enter descriptions of the academic plan, such as information about special programs, faculty, and associated societies. You can then create a separate advisement report querying this field and print the report for brochures and other documentation.

Establishing Academic Organization Ownership

Access the Owner page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Owner**).

Field or Control	*Description*
Academic Organization (lower)	Enter the academic organization that owns this academic plan. Define academic organization values on the academic organization tree in PeopleSoft Tree Manager. Modify them in the Academic Organization Table component.
Percent Owned	Enter the percentage of the academic plan for which the academic organization is responsible. Ownership of the academic plan can be split between academic organizations, but the total percentage must equal *100.*

See *PeopleTools: Tree Manager*.

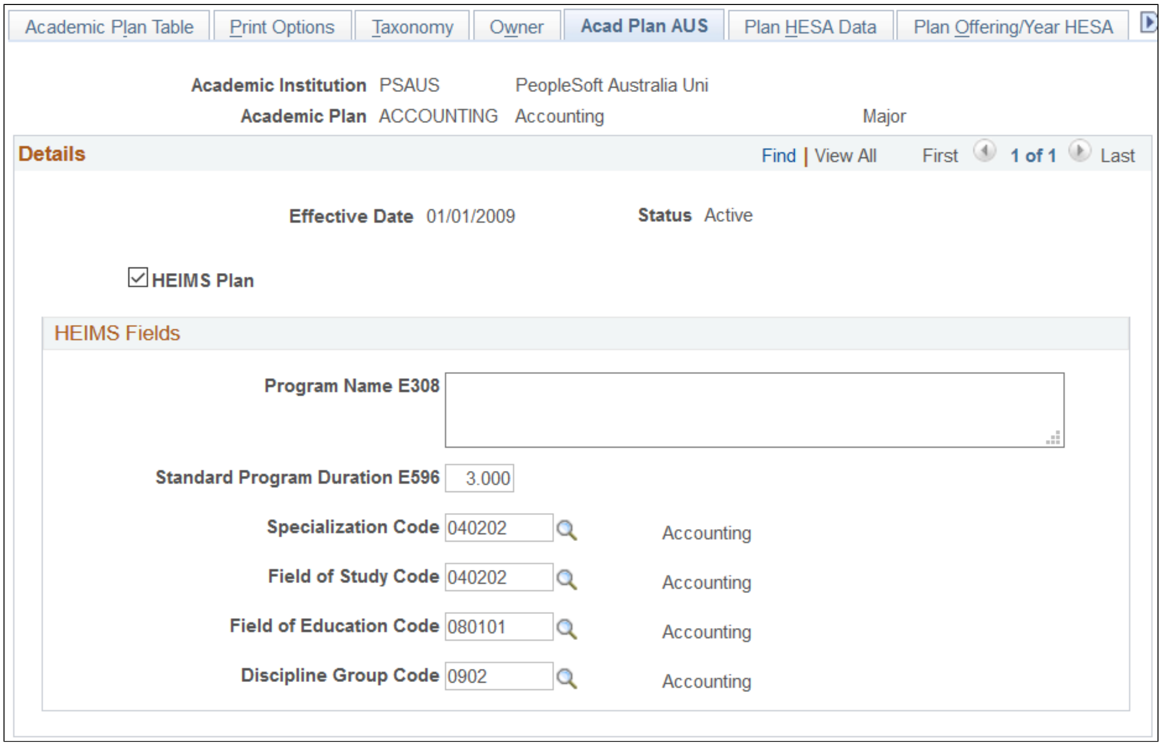
Related Links

Securing Academic Organizations

(AUS) Setting Up Australian Academic Plans

Access the Acad Plan AUS page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Acad Plan AUS**).

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



Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) was previously known as DEEWR and before that as DEST.

Field or Control	*Description*
HEIMS Plan	Select to activate the**Field of Study Code,Field of Education Code,** and**Discipline Group Code** fields. Select this check box to designate the plan for DIISRTE reporting. The **Course Code** field in DIISRTE reporting uses either the student's plan (when marked as a DEST plan) or the student's program. Course Code, element 307, is important for DIISRTE reporting.

HEIMS Fields

Field or Control	*Description*
Program Name E308	Enter the program name for this academic plan.
Standard Program Duration E596	Enter the standard duration of the course of study.

Field or Control	*Description*
Specialization Code	Enter a specialization code for this academic plan. The drop-down list contains the Field of Study Classifications you set up.
Field of Study Code	Enter a field of study code for this academic plan. Define field of study codes on the Field of Study Table page. **Note:** Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference.
Field of Education Code	Enter a field of education code for this academic plan. This code is used to derive the DIISRTE reporting element 464 Discipline Group Code. The element can be derived from either the plan or the course offering. Field of Education is defined by the Australian Standard Classification of Education as issued by the Australian Bureau of Statistics.
Discipline Group Code	Enter a discipline group code for this academic plan. Define discipline group codes on the Discipline Group Code Table page.

Related Links

"Setting Up TCSI Reporting Codes" (Student Records)
"Understanding TCSI Reporting" (Student Records)

(NZL) Setting Up New Zealand Academic Plans

Access the Acad Plan NZL page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Acad Plan NZL**).

Field or Control	*Description*
Subject Code - NZ MoE (New Zealand Ministry of Education subject codes)	Enter a subject code; codes are defined by the New Zealand Ministry of Education. These codes are used in the Single Data Return Qualifications Completions file. You can create codes in the MoE Subject NZL component.
NZVCC Subject Code (New Zealand Vice-Chancellor's Committee subject codes)	Enter a subject code; codes are used in the University Graduate Destinations Survey. You can create codes in the NZVCC Subject Codes NZL component.

Related Links

"Understanding New Zealand Government Reporting" (Student Records)

Defining Academic Plans for the Advisement Self-Service What-If Scenarios

Access the Advisement page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Advisement**).

You can enable students, advisors, or pre-matriculated students to generate a what-if advisement report. For example, perhaps a student is considering changing his or her major (academic plan) and wants to run an advisement report that evaluates the degree requirements for that "what-if" major. The student wants to evaluate his or her academic progress towards that "what-if" major. The fields on the Advisement page are for use with the What-If Report – Create What-if Scenario self-service page. If you select a check box, the respective user can see this academic plan in the Area of Study field's list of values on the Create What-if Scenario page. This also depends on the academic program value selected. For example, if the plan is attached to a program that is not set to display, then the plan will not display.

For academic plans already defined in your system, the system selects the check boxes by default. If you add a new academic plan, the system clears the check boxes by default.

Field or Control	***Description***
Show in What-If Advisor	Select to make the academic plan available for selection by the advisors when they define a what-if scenario for a student or pre-matriculated student using the What-If Report – Create What-if Scenario self-service page.
Show in What-If Pre-matriculated Student	Select to make the academic plan available for selection by the pre-matriculated students when they define a what-if scenario using the What-If Report – Create What-if Scenario self-service page.
Show in What-If Student	Select to make the academic plan available for selection by the students when they define a what-if scenario using the What-If Report – Create What-if Scenario self-service page.

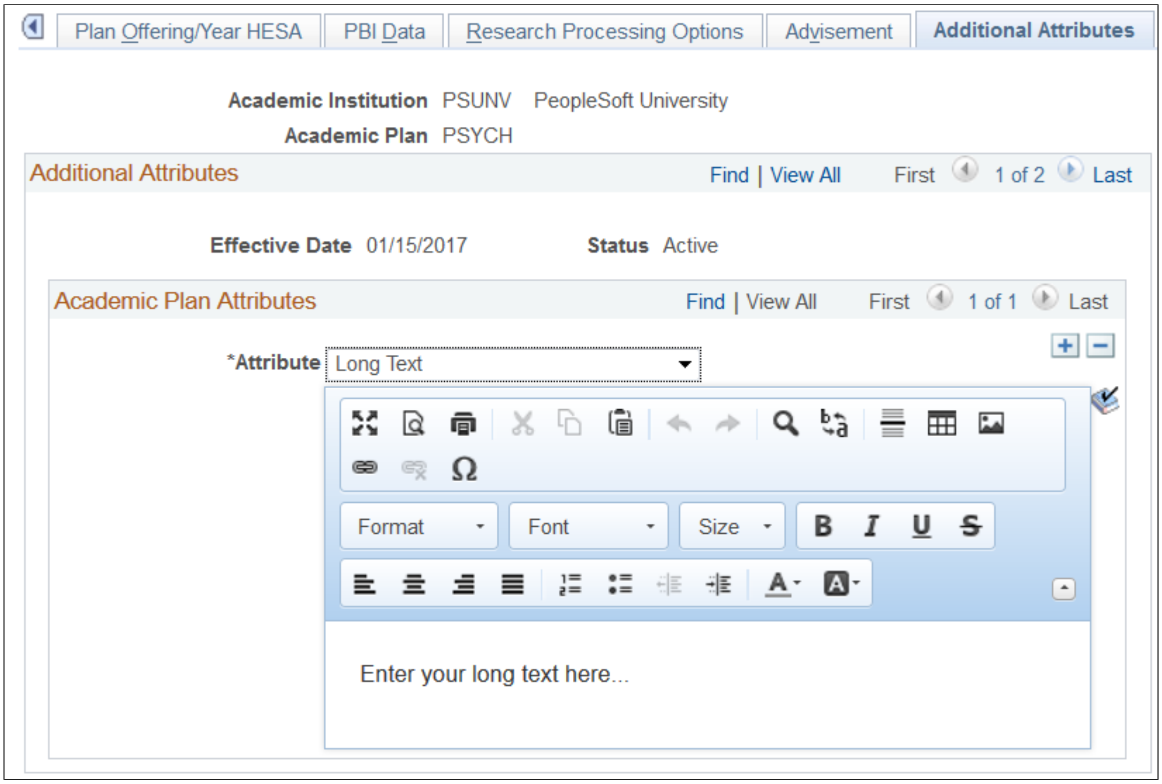
Related Links

Defining Academic Institutions

Defining Additional Academic Plan Attributes

Access the Additional Attributes page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **Additional Attributes**).

This is an example of an attribute that can be used on the Additional Attributes page.



Use this page to enter and review Common Attribute fields associated with the academic plan.

The Academic Plan Table CAF record (ACAD_PLAN_CAF) is delivered and associated with the Academic Plan Table (ACAD_PLAN_TBL) record.

This page appears only after adding common attributes to the Academic Plan CAF Table attribute record using the record context (CSS_CAF_REC_ATTRIBUTE) component.

Note: On the **Record Context** page, you must select the *Inline Subpage* option in the **Attribute Display Type** group box. The other option, *Secondary Page*, is not a supported display type for attributes associated with the Academic Plan Table.

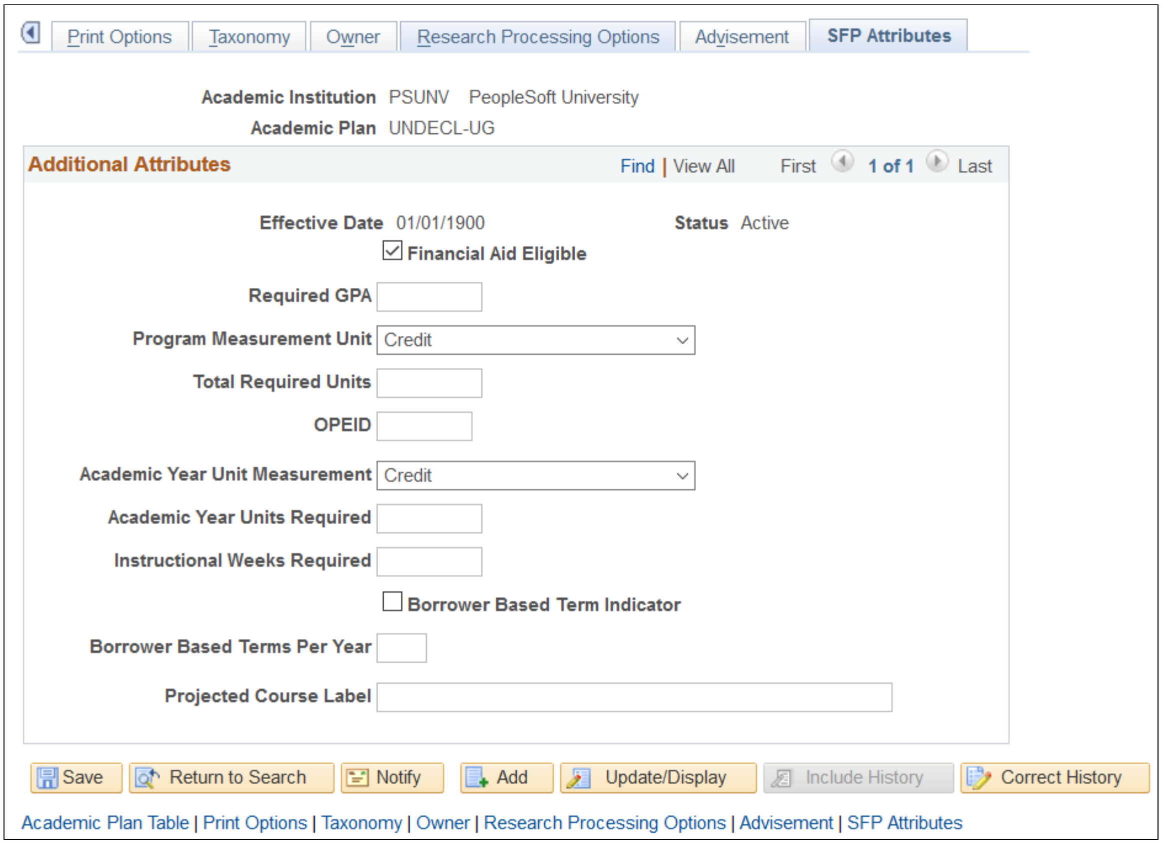
See "Defining a Common Attribute" (Campus Community Fundamentals).

See "Associating a Common Attribute to a Record" (Campus Community Fundamentals).

Defining Student Financial Planning (SFP) Attributes

Access the SFP Attributes page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic Plan Table** > **SFP Attributes**).

This example illustrates the fields and controls on the SFP Attributes page



Use this page to enter and review SFP Attribute fields associated with the academic plan.

SFP Attributes Fields

Field or Control	***Description***
Financial Aid Eligible	Select to indicate that students in the academic plan are eligible for financial aid.
Required GPA	This is the program’s GPA that is required of a student in order to pass a component of the SAP evaluation.
Program Measurement Unit	Defines if a program is credit hour or clock hour.
Total Required Units	Defines the number of units required to complete the student's program.
OPEID	COD requires schools to report a student's physical campus of attendance as the Enrollment School Code using the 8 digit OPEID codes assigned to your institution.

Field or Control	***Description***
Academic Year Unit Measurement	Defines the number of units required to complete the student's program.
Academic Year Units Required	This value determines if the program is a Credit or Clock Hour Program.
Instructional Weeks Required	Represents the Academic Year Definition in terms of instructional weeks required to complete an Academic Year. For Non-Term Programs, will ensure the student meets the minimum number of instructional weeks before completing the academic year. For Term Programs, we rely on the schools setting the academic terms/years to meet the regulatory minimum.
Borrower Based Term Indicator	Select if the terms in the Student Academic and Financial Information (SAFI) message should not be aggregated by the regular Academic Year.
Borrower Based Terms Per Year	Enter the number of terms per Borrower Based Academic Year. If you populate this field, ensure that the **Borrower Based Term Indicator** check box is selected.
Projected Course Label	If left blank, the default value of **Projected Course Enrollment** will be used.

Defining Academic Subplans

To set up academic subplans, use the Academic SubPlan Table component (ACAD_SUBPLN_TBL).

This section provides an overview of academic subplans and discusses how to:

- Describe academic subplans.
- Set up taxonomy.
- Define academic subplans for the advisement self-service what-if scenarios.
- Identify any additional Common Attribute Framework attributes for the academic subplan.

Understanding Academic Subplans

Academic subplans are areas of further specialization within academic plans, and they are tied to academic plans. You can define an academic subplan as a minor, a concentration, or a specialization. For example, a major in English might have additional work associated with it so that students can concentrate in creative writing. Similarly, a Ph.D. program in mathematics might have specializations in computer science and physics.

Determining whether to create academic subplans as minors is dictated by the academic plan and the academic structure. For instance, if students can minor in creative writing only if they major in English, then you would define the creative writing minor as a subplan and link it to the English academic plan. If students can minor in creative writing regardless of their major, then you would define creative writing as a minor on the Academic Plan Table page.

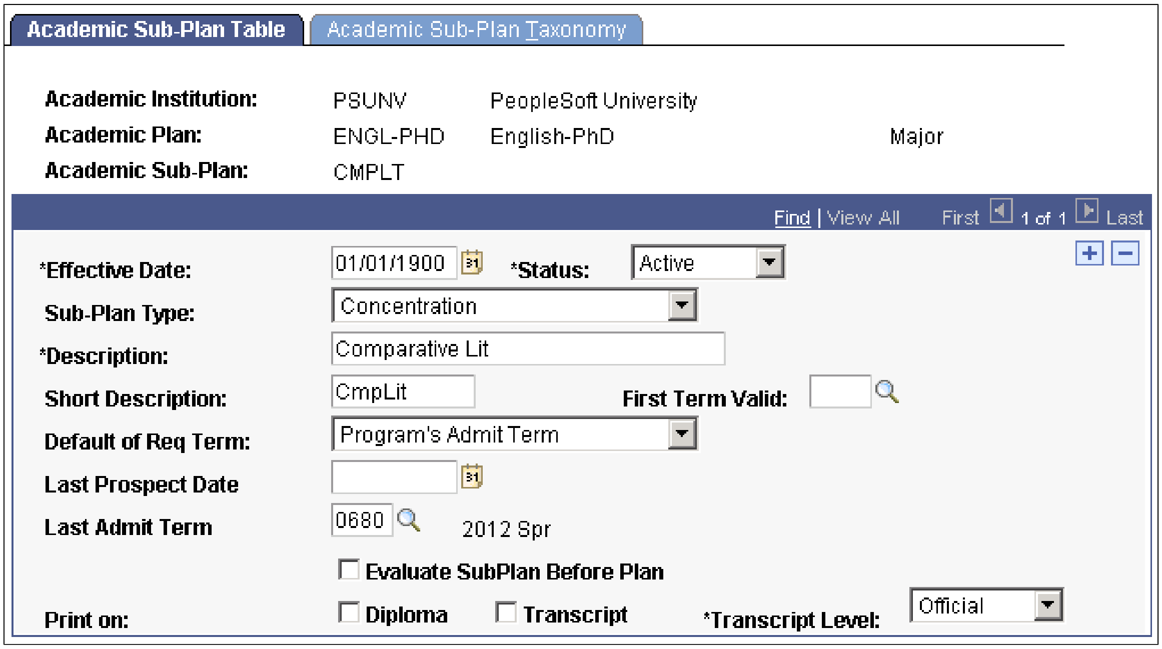
Pages Used to Define Academic Subplans

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Sub-Plan Table	ACAD_SUBPLAN_TBL	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Academic Sub-Plan Table**	Describe academic subplans, and establish diploma and transcript printing options and text for academic subplans.
Academic Sub-Plan Taxonomy	ACAD_SUBPLAN_TXNMY	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Academic Sub-Plan Taxonomy**	Set up taxonomy for academic subplans, including CIP codes and HEGIS codes for academic plans.
Advisement	SSR_SPLN_TBL_AA	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Advisement**	Identify if you want active students, advisors, and prematriculated students to be able to select this subplan on the What-If Report – Create What-if Scenario (SAA_SS_WHATIF) page.
Additional Attributes	ACAD_SUBPLN_CAF	**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Additional Attributes**	Define academic plan Common Attribute Framework (CAF) attribute values. **Note:** This page is available only after adding common attributes for the Academic Sub Plan CAF Table attribute record using the CSS_CAF_REC_ATTRIBUTE component.

Describing Academic Subplans

Access the Academic Sub-Plan Table page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Academic Sub-Plan Table**).

This example illustrates the fields and controls on the Academic Sub-Plan Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Sub-Plan Type	Enter a type for the academic subplan. You can modify these translate values.
First Term Valid	Enter the first term in which students can be admitted to the academic subplan. You cannot admit students to the academic subplan before the term that you specify. If you enter the term *0000,* you can admit students to the subplan for any term. When you convert data to the PeopleSoft system, be sure that you enter a first valid term that is appropriate for the preexisting data for the academic subplan. This field is optional. **Note:** Students can modify this subplan when their admit term is prior to this term as long as the effective date of the change is greater than or equal to the start date of this term.
Default of Req Term (default of requirement term)	Select the default term for which the system begins accumulating requirements for the academic subplan. You can override the default value for individual students on the Student Sub-Plan page. Modification of these translate values requires significant programming effort. **Note:** Set a default here so that when you analyze completion requirements for an academic subplan, you know which set of requirements to use. Requirements can change over time.

Field or Control	***Description***
Last Prospect Date	Enter the latest date that a subplan can be populated for a new prospect record. You cannot assign a program to a subplan if the system date is greater than the last prospect date.
Last Admit Term	Enter the last term in which students can be admitted to the academic subplan. You cannot admit students to the academic subplan after the term that you specify. The system will compare the admit term used in the student's application to this last term valid value. If the admit term is greater than this value, the program is not available to the user. This field is optional.
Evaluate SubPlan Before Plan	Select to alter reporting sequences. This check box is a feature of Academic Advisement.
Diploma	Select to print a description on student diplomas. The **Diploma Description** field becomes available.
Transcript	Select to print a description on student transcripts. The **Transcript Description** field becomes available.
Diploma Description	Enter the description of the academic subplan. This description appears on student diplomas. The PeopleSoft system currently does not provide a process to print diplomas.
Transcript Description	Enter the description of this academic subplan. This description appears on student transcripts. You can override this text when you prepare students' transcripts.
Indent	Enter the number of spaces that you want to indent the related description when printing the document.

Related Links

“Changes to Academic Structure Processing” (Academic Advisement)
“Processing Batch Transcripts (Application Engine)” (Student Records)
“Processing Transcripts for Individuals or Small Groups of Students” (Student Records)

Setting Up Taxonomy

Access the Academic Sub-Plan Taxonomy page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Academic Sub-Plan Taxonomy**).

Field or Control	*Description*
CIP Code (Classification on International Programs code)	Enter the CIP code for the academic subplan. CIP code. Values are delivered with the PeopleSoft system as translate values. You can modify CIP codes on the CIP Code Table page.
HEGIS Code (Higher Education General Information Survey code)	Enter the HEGIS code for this academic subplan. HEGIS codes are delivered with the PeopleSoft system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.
(AUS) Specialization Code	Enter the specialization code for the academic subplan. The specialization code is reported in element 463 of the DIISRTE Past Course Completions File.

Defining Academic Subplans for the Advisement Self-Service What-If Scenarios

Access the Advisement page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Advisement**).

You can enable students, advisors, or prematriculated students to generate a what-if advisement report. For example, perhaps a student is thinking about adding a concentration (subplan) to his or her Psychology major and he or she wants to see the additional degree requirements for the "what-if" concentration.

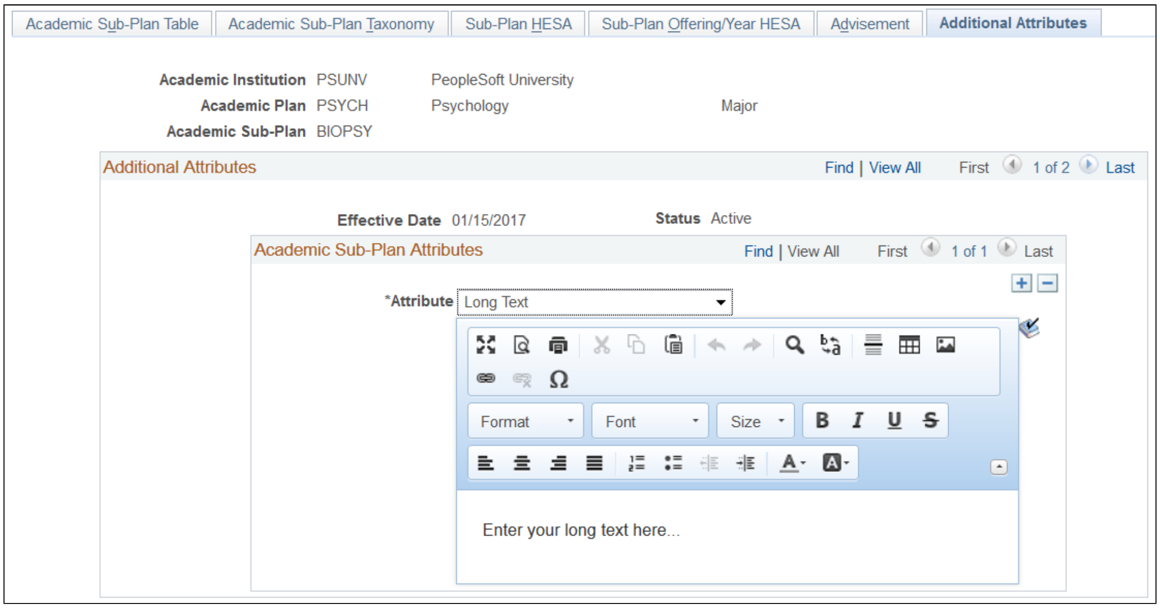
The fields on the Advisement page are for use with the What-If Report – Create What-if Scenario self-service page. If the student-related check box is selected, the student can then view and select the academic subplan in the list of valid subplan values on the Create What-if Scenario page when he or she uses that self-service page. This also depends whether the plan attached to this subplan was also selected as a valid value for display and selection. If not, the user will not see the subplan in the list of values.

Field or Control	*Description*
Show in What-If Advisor	Select to make the subplan available for selection by the advisors when they define a what-if scenario for a student or prematriculated student using the What-If Report – Create What-if Scenario self-service page.
Show in What-If Prematriculated Student	Select to make the subplan available for selection by the prematriculated students when they define a what-if scenario using the What-If Report – Create What-if Scenario self-service page.
Show in What-If Student	Select to make the subplan available for selection by the students when they define a what-if scenario using the What-If Report – Create What-if Scenario self-service page.

Defining Additional Academic Subplan Attributes

Access the Additional Attributes page (**Set Up SACR** > **Foundation Tables** > **Academic Structure** > **Academic SubPlan Table** > **Additional Attributes**).

This is an example of an attribute that can be used on the Additional Attributes page.



Use this page to enter and review Common Attribute fields associated with the academic subplan.

The Academic Subplan CAF Table record (ACAD_SUBPLAN_CAF) is delivered and associated with the Academic Plan Table (ACAD_SUBPLN_TBL) record.

This page appears only after adding common attributes to the Academic Subplan CAF Table attribute record using the record context (CSS_CAF_REC_ATTRIBUTE) component.

Note: On the **Record Context** page, you must select the *Inline Subpage* option in the **Attribute Display Type** group box. The other option, *Secondary Page*, is not a supported display type for attributes associated with the Academic Subplan Table.

See “Defining a Common Attribute” (Campus Community Fundamentals).

See “Associating a Common Attribute to a Record” (Campus Community Fundamentals).

Chapter 14

(AUS) Setting Up Government Reporting

Understanding Australian Government Reporting

There are several Australian government departments that require institutions to submit information about students. The Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) - previously known as DEEWR and before that as DEST - the Australian Tax Office, and Centrelink all require institutions to send periodic reports. The reporting codes you set up will be useful in creating reports for DIISRTE, Higher Education Contribution Scheme (HECS) liabilities, and Centrelink.

Setting Up Reporting Codes

This section discusses how to set up Australian government reporting codes.

Pages Used to Set Up Reporting Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Field of Study AUS	SSR_FOS_TBL	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Field of Study AUS** > **Field of Study AUS**	Define field of study codes. These codes are provided by DIISRTE. Field of study codes identify the primary field of study and the supplemental field of study for a program Assign field of study codes to academic programs on the Acad Prog AUS page in the Academic Program Table component. Also, assign field of study codes to academic subjects on the Subject Taxonomy page. **Note:** Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference.

Page Name	***Definition Name***	***Navigation***	***Usage***
Field of Education AUS	SSR_FOE_TBL	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Field of Education AUS** > **Field of Education AUS**	Define field of education codes. These codes are provided by DIISRTE. Field of education codes identify the primary field of education and the supplemental field of education for a program. Assign field of education codes to academic programs on the Acad Prog AUS page in the Academic Program table component. Also, assign field of education codes to academic subjects on the Subject Taxonomy page.
Discipline Group Table AUS	SSR_DSCP_GROUP_CD	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Discipline Group Table AUS**	Define discipline group codes. These codes must be consistent with the classification of higher education discipline groups. Assign discipline group codes to academic subjects on the Subject Taxonomy page and to academic plans on the Acad Plan AUS page.
AOU Code Table AUS	SSR_AOU_CD_TBL	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **AOU Code Table AUS**	Define academic organization unit (AOU) codes. Assign AOU codes to academic organizations on the Academic Organization Table page.
Program Code Table AUS	SSR_PRG_CD_TBL	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Program Code Table AUS**	Assign program codes to academic program TAC Mapping Program Code field on the Academic Program component.
Program Type Table AUS	SSR_PRG_TYP_TBL	**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Program Type Table AUS** > **Program Type Table AUS**	Define program type codes. These codes are provided by DIISRTE. Assign program type codes to academic programs on the Acad Prog AUS page in the Academic Program Table component.

Defining Field of Education Codes

Access the Field of Education AUS page (**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Field of Education AUS** > **Field of Education AUS**).

Field or Control	***Description***
HECS Band ID	Assign a HECS band ID to this field of education code.

Defining Program Type Tables

Access the Program Type Table AUS page (**Set Up SACR** > **Foundation Tables** > **Reporting Codes** > **Program Type Table AUS** > **Program Type Table AUS**).

Field or Control	***Description***
Non DEST Program Code	Select this check box to identify the program type as a non-DEST (DIISRTE) program type. Enrollments in programs of this type are not included in DIISRTE reports.

Chapter 15

Introducing Security for Your System

Understanding Application Security

PeopleSoft applications use the capabilities and flexibility of multilevel security to provide an efficient, effective security solution. When you manage an environment with shared data, you need a security system that protects data at various access levels. You also need the flexibility to define the most effective and efficient path to that data across business groups, tables, departments, pages, and so forth. PeopleSoft uses an approach that enables you to set up data access at different entry points within the system.

Security access falls into three categories:

- Network security.
- Database security.
- PeopleSoft application security.

Network security controls the overall point of entry into system hardware and software. Database security narrows the scope of user access to information. Application security enables you to control access down to the level of an individual field.

Most system users typically have access to a defined set of functions, pages, or fields that enable them to perform their jobs. Examples of such users are:

- Auditors who must review inquiry pages and generate reports.
- Users who run PeopleSoft business processes.
- Management information systems staff members who configure and maintain pages and records.

In PeopleSoft applications, you have full control over security definitions and how they fit together. The security options that you enter create a matrix that enables or blocks user access to data through a series of authorizations. Users pass through several levels of authorizations before the system grants them access to any subset of the data.

Important! Creating security for prompt values or rows of data is *not* the same as giving security access to pages, which you do in PeopleTools. Giving users access to pages by using PeopleTools is required in addition to the security setup discussed in upcoming topics.

Understanding Security Vocabulary

Make sure that you understand the security terms and functions for each level of the system:

Security Type	***Where Implemented***	***Function***
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
Relational database management system (RDBMS)	Operating system	Controls access to the database.
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups used in application development.
Query	PeopleTools	Defines which set of table rows a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Controls access to the subset of data rows within tables to which the user has authority.
Field-level	PeopleCode	Controls access to individual fields within pages.

Specifying Row-Level Security Options

This section provides an overview of row-level security and discusses how to:

- Maintain row-level security.
- Set up row-level security views.
- Define row-level security for users.

See *PeopleTools: Security Administration*

Understanding Row-Level Security

To establish security within the PeopleSoft application, decide what level of security to establish throughout the system, which key fields to secure, and whether security will be handled through user IDs or roles. Security can restrict individual users or roles from specific rows of data that are controlled by such key fields as setID and business unit. You can also limit user access to a specific subset of rows. For example, user ID security can allow the law school to access only the item types assigned for the law school. Or, if you have a group of staff in the registrar's office, you can add them all to a role and use role security to enforce the appropriate limits on their system access. A user may be assigned to one or more roles, providing considerable flexibility to access necessary resources. As a result, a user who is linked to more than one role can use the menu items assigned to any of those roles. Some security attributes—such as row-level security—cannot be defined by combining roles. Only one role can be used for this purpose.

In **PeopleTools** > **Maintain Security** you designate row-level security for a user by selecting a role. The row-level security attributes for the role that you select then become the security attributes for that user.

Because various combinations of security are possible, it is important to understand the effects of row-level security when you use this mix of system security options and roles:

System Security	***Role of User ID***	***Row-Level Security***
No security	User ID is not linked to a role.	Not applicable; each user can access any object because there is no security implemented.
User-level security	User ID is not linked to a role.	Defined in the application by key field security.
Role-level security	A user ID is normally assigned to a row-level security role. It is possible, however, to link a user ID to multiple roles, but not when you specify row-level security.	Defined by a row-level security role. If a user ID is not assigned to a row-level security role, then that user has access to menu items, but does not have access to any application pages with key fields enabled for row-level security.

You must set up which users or roles have access to specific business units, setIDs, and any other key fields that the application requires. For example, you might permit access to only one business unit for a certain role of users.

When a user in this role enters data, the system requires a business unit because this is the primary key for data related to the business unit. The available selections on the prompt list for this user include only the business units for which the user has been granted authority. What appears in the prompt list is data that has been filtered through one or more levels of security.

Maintaining Row-Level Security

The number of users assigned the same level of security should be a key factor in determining whether the type of security should be based on user ID or role maintenance. If thousands of users have identical access requirements, then exploring roles is a good idea. By assigning users to a single role, subsequent changes in access requirements for these users can be made once rather than multiple times.

Setting Up Row-Level Security Views

Business units and tableset IDs are maintained in edit tables and can be used as primary keys throughout the system. When a field uses an edit table to select values, you are limited to selecting only the values that have already been defined for that edit table. PeopleSoft row-level application security, when activated, enables you to specify values from the edit table, so that only those Values are: available in a particular view. Think of views as a means to access data horizontally across more than one table. Views are Structured Query Language statements that filter out data rows whose key Values are: not needed as valid access parameters. The result is that users who are authorized to access setIDs or business units see only a subset of the values from these edit tables. After these views are set up, you can specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from a particular role.

See *PeopleTools: PeopleCode Language Reference*

Defining Row-Level Security for Users

After you select security options and set up security view names, you are ready to define the actual secured field values used by each user or role. When you secure key fields in the application, the page that you use depends on which level of system security you select. If you select user-level security, you utilize user security pages. If you select role-level security, you use the permission list security pages.

Managing Department Security

The application pages discussed in this documentation are provided in order to support department security use in the system. One example of where department security is required is Service Indicator setup and functionality.

See "Setting Up Service Indicator Codes and Reasons" (Campus Community Fundamentals).

The following topics provide an overview of the data permission security by department security trees and discuss how to manage tree-based data permission.

Note: After you assign a row security permission list to a user, you must run the Refresh SJT_OPR_CLS process.

Note: If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations.
See:
Integrating Person Data
Integrating Setup Data
Monitoring Integrations Using the Integrity Utility
Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions in My Oracle Support (ID 2091799.2).

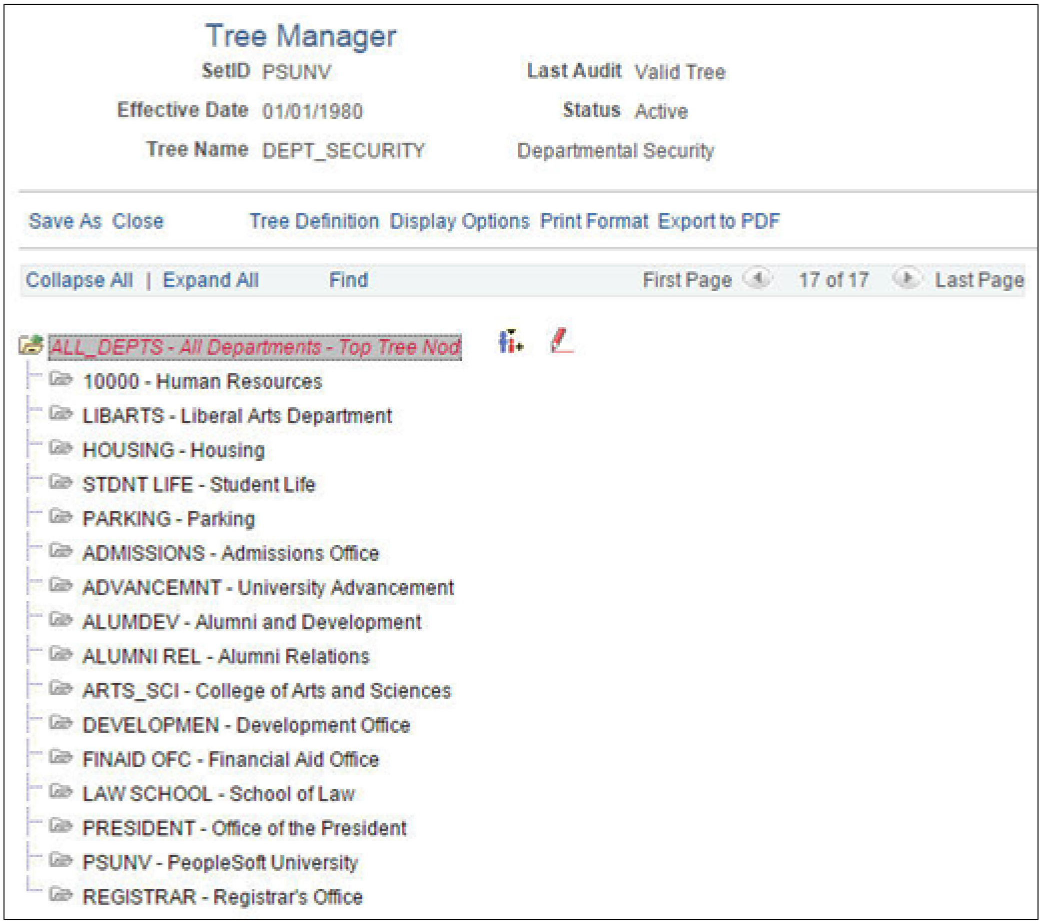
Understanding Data Permission Security by Department Security Trees

Each security set has a tree-based security access type. Tree-based security access types use department security trees to set up a hierarchy of your departments and enable you to use this hierarchy to simplify data assignment.

You use PeopleSoft Tree Manager to build a hierarchy of department security for an organization. A security tree provides a graphic means to grant and restrict access to data. The security tree does not have to represent your organization's hierarchy exactly, although it is usually very close.

To grant a row security permission list access to a group of departments, you grant access to the department to which all of those departments report. You can restrict access to individual departments or to a group of departments if you need to. This is an example of a department security tree for the PSUNV set ID:

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



Using this security tree you could, for example, grant a row security permission list access at the top level for 'ALL_DEPTS' and allow access to everyone in all the child department entities.

You also manage the security at a more granular by restricting permission list access only to a subset of the child departments in this tree. For example a row security permission list may only grant access to the Parking and Student Life departments.

Note: You can only grant tree-based data permission to row security permission lists.

Before you work with data security and PeopleSoft Tree Manager, make sure that data is defined in the PeopleSoft Campus Solutions control tables.

Warning! Before you create or modify a security tree, it is recommended that you review *PeopleTools: Tree Manager* documentation for a detailed discussion of using Tree Manager because this section does not provide a complete overview of the application. Security is an important component of your system, and it is crucial that you understand all aspects of PeopleSoft security and its tools before you implement it.

Security Trees and Departments

For the purpose of building department security trees, PeopleSoft defines all entities in an organization —from companies to departments—as departments. The department data is created and stored in the Departments component (DEPARTMENT_TBL), which you can access from PeopleSoft Tree Manager or the Set Up Common Objects menu. You assign security access based on these departments so define each entity in your organization in the Departments component so that you can add its department ID code to the security tree.

Trees are built with levels and nodes:

- Levels are the levels of the hierarchy.
- Nodes, representing organizational entities, are added at different levels to indicate their place in the hierarchy.

For example, the first level of your tree might be the company level. The second level might be the regional level. A node that is added at the first level is a company-level node and represents the company department. A node that is added at the second level is a regional-level node and represents a regional department, such as an office. The first node in your organization is the root node. This is the highest node in the hierarchy. All other nodes (departments) report up to the root node.

Access to data is based on the hierarchy that you create. If you grant access to a department, you also grant access to each department that reports to that department.

Security Trees and Effective Dates

Department security trees are called DEPT_SECURITY. Security trees are uniquely identified by their set ID and effective date.

You can create future-dated trees to reflect a change in your reporting structure and you may want to grant access using the newer tree (or, perhaps, to a historical tree).

When you assign data to a permission list on the Security by Dept Tree page select the date as of which you want the trees to be effective. When you add a row in the Define Security Profile grid on the Security by Dept Tree page and select the set ID of the security tree, the system references the security tree that is effective as of the date you selected in the As of Date for the Trees field.

For example, it is now April, 2015 and you have created a future-dated security tree for the PSUNV set ID dated January 1, 2016. You wish to try out the data permission using the new tree. On the Security by Dept Tree page, enter January 1, 2016 (or a higher date; the date does not have to be the exact effective date of the tree) in the As of Date for the Trees field. Add a row in the Define Security Profile grid and select the PSUNV set ID. The system displays January 1, 2016 in the Effective Date field in the grid and uses the future-dated tree to enforce data permission for that permission list.

When the future-dated tree becomes effective, the system does not automatically update the security profiles of permission lists referencing the old tree. For example, on January 1, 2016, the system continues to use the previous PSUNV tree to enforce data permission for all the permission lists that were referencing it.

To update the permission lists so that they reference the new tree, enter the Security by Dept Tree page, enter the date January 1, 2016, and click the Refresh Tree Effective Date button. The system then updates the effective dates of all the trees referenced by that permission list to the dates the trees effective as of January 1, 2016.

Pages Used to Manage Department Security

Page Name	***Definition Name***	***Navigation***	***Usage***
Tree Manager	PSTREEMGR	**Tree Manager** > **Tree Manager** > **Tree Manager**	Set up or modify department security trees using PeopleSoft Tree Manager.
Security by Dept Tree	SCRTY_TABL_DEPT	**Set Up Common Objects** > **Security** > **Core Row Level Security** > **Security by Dept Tree**	Grant tree-based department data access to row security permission lists.
Refresh Row Security Operator	SCRTY_OPR_RC	**Set Up Common Objects** > **Security** > **Core Row Level Security** > **Refresh SJT_CLASS_ALL**	Refresh some or all of the data in the SJT_CLASS_ALL table to capture changes to permission lists that were not automatically loaded into the table.
Scrty Oprcls Rc (Security Operator Class)	SCRTY_OPRCLS_RC	**Set Up Common Objects** > **Security** > **Core Row Level Security** > **Refresh SJT_OPR_CLS**	Refresh some or all of the data in the SJT_OPR_CLS to capture the current relationship between user profiles and permission lists.

Creating and Modifying Security Trees

Access the Tree Manager page (**Tree Manager,** > **Tree Manager,** > **Tree Manager.**).

You must run the Refresh SJT_CLASS_ALL process whenever you set up or modify a tree.

Creating Security Trees Manually

The steps for creating a tree manually are described in *PeopleTools: Tree Manager*. When you create a security tree, enter the following data on the Tree Definition and Properties page (PSTREEDEFN):

Field or Control	***Description***
Tree Name	Enter *DEPT_SECURITY.*
Structure ID	Select *DEPARTMENT*. PeopleSoft delivers the system with this structure ID set up.
Description	Enter a description of the tree.

Field or Control	*Description*
Set ID	Select the set ID of the departments that you are adding to the tree.
Effective Date	Enter the date that the tree becomes effective. Add only the departments that are effective on or before this date.
Status	Select the status of the tree.
Category	Select the category of the tree.
Use of Levels	Select one of the following options: • *Strictly Enforced* Your levels consist of only one type of entity. For example, only regions report to the company level and only divisions report to the regional level. • *Loosely Enforced* The entities combine different types of entities. For example, both regions and divisions report to the company level. • *Not Used* Your security structure is flat, and you don't need to set up groups of units in levels.
All Detail Values in this Tree	Leave blank.
Allow Duplicate Detail Values	Leave blank.

Once you have created the basic tree structure, you begin to add nodes. In a security tree, each node represents a business entity in your organization. You define nodes on the Departments component, creating a department for each business entity in your organization.

You must have a node for every department in the set ID. You can add nodes to your trees as you add departments to your organization.

To add a new, future-dated department in order to maintain data security for people added to the new departments, create a future-dated security tree. This enables you to add people to the new department before it becomes effective and still be able to control access to their data in the present.

Creating Security Trees Automatically

You can create a security tree using an existing organizational structure. Use the following Structured Query Report (SQR) procedure to import the existing hierarchy and build your security tree. You import your department data into a temporary Department Table, and the system uses that data to build the security tree.

To set up a hierarchy of departmental entities and build your data security tree automatically:

1. Import the entity data.

   Import the entity data into the temporary table R_PER507 using the PeopleSoft Import utility, a Structured Query Report (SQR), or another batch facility. You load department data into this temporary table, so before you use this utility, you must establish the reporting hierarchy for all the departments in your organization. To do this, use the REPORTS_TO_DEPT field in the R_PER507 temporary table. The table looks like DEPT_TBL, but it includes the following additional columns:

Column	***Description***
SETID_RPDEPT	Specifies the set ID of the department that a particular department reports to. In addition to the other Department Table data, you must load data into this column.
REPORTS_TO_DEPT	Specifies department that a particular department reports to. In addition to the other Department Table data, you must load data into this column.
ORGCODEFLAG	Indicates whether the department is selected for processing as of a particular date. The system populates this column based on your department data and the REPORTS_TO_ DEPT field values.
ORGCODE	Designates the position of the department in the hierarchy. The system populates this column based on your department data and the REPORTS_TO_DEPT field values.
TREE_LEVEL_NUM	Temporary work column.
PARENT_NODE_NUM	Temporary work column.
TREE_NODE_NUM	Temporary work column.
TREE_NODE_NUM_END	Temporary work column.

2. Set up the reporting hierarchy.

   Run PER507 to set up the reporting hierarchy of your tree. This utility determines whether a department is active or inactive as of the date that you enter when you run the utility, and populates the ORGFLAG column in R_PER507 accordingly. The utility creates a structured organization code based on the *REPORTS_TO_DEPT* field values that you loaded and populates ORGCODE accordingly. This utility uses the ORGCODE values to set up the department hierarchy.

3. Build the department security tree.

   Run PER508 to build your DEPT_SECURITY tree. The effective date of the tree is the latest effective date of the departments that were processed in step 2.

   Note: To set up multiple trees to represent security or organizational structures at different points in time, perform step 2 for each tree, setting the As of Date each time, and perform this step again.

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4. Transfer department data into the department component.

   Run PER509 to transfer the information that you set up in R_PER507 into DEPT_TBL. You cannot view or update the Department component until you run this utility.

5. Renumber and insert numbered gaps in the security tree.

   Run PTUGAPTR.SQR to renumber the nodes in your tree and insert numbered gaps between the nodes.

Modifying Security Trees

You can modify an existing tree by changing either the nodes or the levels. When you modify a security tree, the tree node numbers usually change, so you need to refresh the numbers. You also need to run the Refresh SJT_CLASS_ALL process to update the data access profiles and security join tables.

Renumbering Gaps in Security Trees

PeopleTools assigns each node a number and reserves a series of unused numbers, called gaps, which the system uses to make changes to sections of a security tree. When you move a node, the system renumbers the nodes that appear to the right of the node that you moved (the children of the node that you moved). When you save changes to a tree, the system saves only the parts of the tree that have changed.

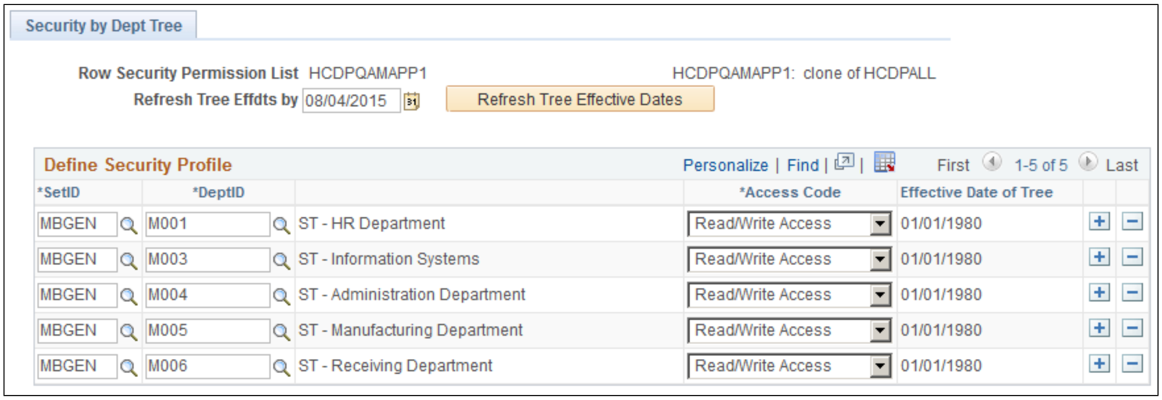
To refresh the unused numbers in the gaps between nodes, run the PTUGAPTR.SQR utility. Refresh unused numbers when:

- You load your security tree structure.
- You modify your security tree.
- An error message tells you to gap your tree.

Granting Security by Department

Access the Security by Dept Tree page (**Set Up Common Objects** > **Security** > **Core Row Level Security** > **Security by Dept Tree**).

This example illustrates the fields and controls on the Security by Department Tree Page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Refresh Tree Effdts by (refresh tree effective dates by)	The system references the trees that are effective as of this date when you select a tree set ID in the Define Security Profile grid. Select a date in the future to reference a future-dated tree. For example, to use the department security trees that are current as of today's date, enter today's date in this field.
Refresh Tree Effective Dates	Select to refresh the trees listed in the Define Security Profile grid to trees that are effective as of the date in the As of Date for Trees field. Note: To ensure that your row security permission lists use the current trees you must enter the appropriate as of date and click this button whenever you create a more recent version of a set ID's security tree.

Define Security Profile

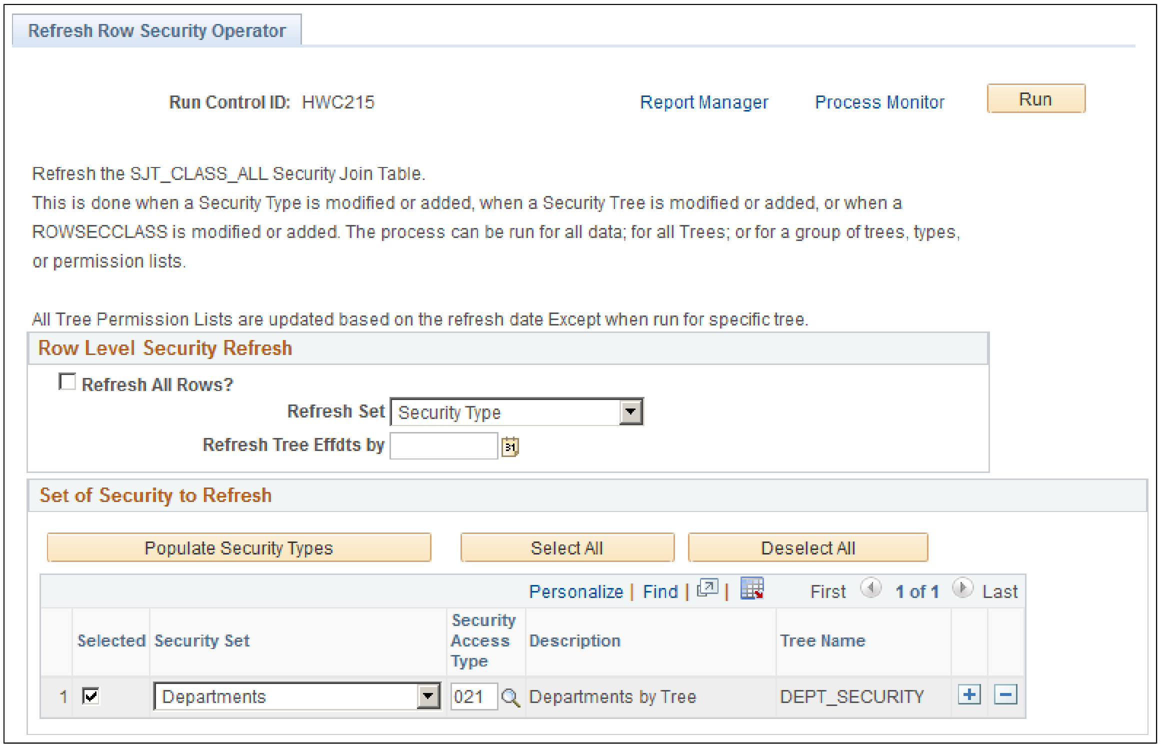
Field or Control	*Description*
Set ID and Dept ID (set ID and department ID)	Enter the tree set ID and the ID of the department that you are granting access to. The row security permission list has access to each department ID that reports up to this one on the security tree (unless you specify otherwise) so you don't have to select each department ID individually.

Field or Control	***Description***
Access Code	Indicate what kind of access the row security permission list has to the data for this department ID. To restrict access to one or more departments that report up to a department ID that you've granted access to, insert a row and select the restricted department's ID and then select an Access Code of No Access. You need to restrict access explicitly only for department IDs that report up to the department ID to which you want to grant access. Otherwise, the row security permission list doesn't have access to a department unless it or the department to which it reports has been granted access on this page.
Effective Date of Tree	Displays this set ID's tree effective date. Make sure that the effective date of the tree is accurate. The system does not update the effective date automatically if you make a newer version of a tree. To update trees, enter the date as of which the tree is effective in the Refresh Tree Effdts by field and click the Refresh Tree Effective Dates button.

Refreshing Row Level Security

Access the Refresh Row Security Operator page (**Set Up Common Objects** > **Security** > **Core Row Level Security** > **Refresh SJT_CLASS_ALL**).

This example illustrates the fields and controls on the Refreshing Row Level Security Operator Page. You can find definitions for the fields and controls later on this page.



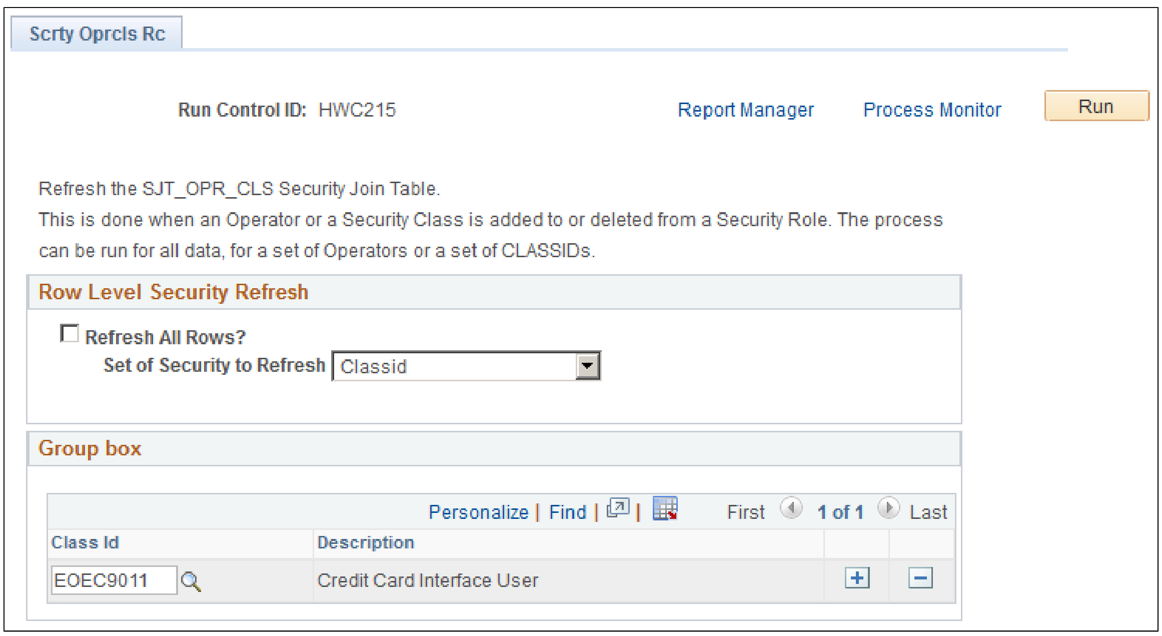
Field or Control	*Description*
Refresh All Rows	Select to refresh every row in SJT_CLASS_ALL. Deselect to refresh selected rows. The system displays the Refresh Set field.
Refresh Set	Select the set of rows to refresh. The system displays the Set of Security to Refresh grid. You can select to refresh: • *All Trees* • *Permission List* • *Security Type* • *Specific Tree.*
Refresh Tree Effdts by (refresh tree effective dates by)	Select the date as of which you are refreshing the table. The process refreshes the table with the security data that is effective as of this date.

Field or Control	*Description*
Set of Security to Refresh	Select the values to refresh. For example, if you've modified a row security permission list, rather than refreshing the entire table, select *Permission List* in the Refresh Set field and select the permission list you modified here. If you've modified a specific tree, select *Specific Tree* in the Refresh Set field and select the setIDs to refresh for that tree.

Refreshing Operator Level Security

Access the Scrty Oprcls Rc (Security Operator Class) page (**Set Up Common Objects** > **Security** > **Core Row Level Security** > **Refresh SJT_OPR_CLS**).

This example illustrates the fields and controls on the Scrty Oprcls Rc (Security Operator Class) page. You can find definitions for the fields and controls later on this page.



The Refresh SJT_OPR_CLS process refreshes SJT_OPR_CLS as of the system date.

Field or Control	*Description*
Refresh All Rows	Select to refresh every row in SJT_OPR_CLS. Deselect to refresh selected rows. The system displays the Set of Security to Refresh field.

Field or Control	Description
Set of Security to Refresh	Select the set of rows to refresh. You can select to refresh: • *Classid* – Select to refresh the table with the selected row security or role-based permission lists IDs of users to whom they are attached. • *Oprid* – Select to refresh the table with the selected user IDs and the permission lists assigned to them.

Setting Up Security for Local Functionality

This section provides an overview of security for local functionality and discusses how to:

- Grant access to local country functionality.
- Restrict access to local country functionality.

Understanding Security for Local Functionality

Local functionality is country-specific functionality, displayed in the global components in collapsible sections marked by the country's flag. You use component permission to grant access to local components. To grant access to the local functionality on global components, use the Global Panels page in addition to component permission.

To grant users access to local country functionality on the global menus:

1. Grant the primary permission lists access to country-specific functionality using the Global Panels page.
2. Assign a user access to a primary permission list which provides access to the countries that are required by the user, on the User Profile - General page.

See: *PeopleTools: Security Administration*

Pages Used to Grant Access to Local Country Functionality

Page Name	Object Name	Navigation	Usage
Global Panels	SCRTY_TBL_GBL	**Set Up Common Objects > Security > Component and Page Security > Setup Global Security > Global Panels**	Select which country functionality a primary permission list can access on global components.

Page Name	***Object Name***	***Navigation***	***Usage***
Global Panels—Excluded Panel groups	SCRTY_GBL_SEC	Click the Excluded Components link on the Global Panels page.	Restrict access to local functionality on selected components.

Chapter 16

Securing Your Academic Institution

Securing Access to Student Data

To set up student data security access, use the Security Views component (ES_SECURITY_TBL), the Security Views Update component (RUNCTL_SRSECVWU), and the Security View Change Audit component (SECURITY_AUDIT).

You can secure a user's access to pages that contain student information.

This section provides an overview of security for access to student data, lists prerequisites (including delivered security views), and discusses how to:

- Set component security.
- Run the Security Views Update SQR process (SRSECVWU) and report.
- Specify search parameters for security view changes.
- Review security table audit information.
- Review security detail audit information.
- Set advisement report security.

Understanding Security for Access to Student Data

The Component Security feature provides the option to impose security on selected components, based on a student's institution, campus, career, program or plan. You set the specific security level on the Security Views page. The security level determines which search record (or security view) is used when the user attempts to access the component. Select *No Security* to retain the original search records that are delivered with the system. The security views delivered with this feature enable the system to verify that the user has access to the appropriate institution, campus, career, program, or plan to view, update, or add data relating to a student's record.

The security level becomes effective only after you run the Security Views Update process. This process exchanges the original search record with one of the delivered security views for a component (if you select the Global Security option) or a specific menu item. In the latter case, the component search record is overridden only on the specific menu item with one of the security views. Consequently, you can impose different levels of security for components that are accessed using different navigation paths.

After you have created security views for the institution and applied views for components that you want to secure, you can use the Security View Change Audit component to view the details of any changes to those settings. For example, you can view the user ID, date of action and action taken, and the security level settings for a particular component. You can see when the security view was created, updated, or deleted, and you can view the state of the record before and after a change. A check box on the Search Criteria page controls how the system returns values that match the selection criteria.

Note: This feature should not be used to update search record security for self-service features.

You complete these steps to secure access to student data:

1. Identify and define levels of security for a component on the Security Views page.
2. Update security definitions by running the Security Views Update process on the Security Views page.
3. (Optional) Perform an audit of changes to security in the Security View Change Audit component.

Prerequisites

Before you implement component security, identify people at the institution who have both technical and functional expertise and who can review this feature. Although the Component Security feature is functional in application, it is quite technical in design and implementation. The individuals assigned to evaluate, incorporate, and support this feature must not only understand the way staff and faculty interact with student-centered components at the institution, they must also have a solid understanding of table structures, security views, and page caching. A working knowledge of managing version control and PeopleSoft lock records is also useful.

Begin the review process by thoroughly investigating delivered security views for all tables. To do this, run the Security Views report with the Report Only option selected. Notice in the report that the majority of delivered component security views are not set at the global level but at the menu item level. Also most of the delivered views are limited to PeopleSoft Academic Advisement, PeopleSoft Recruiting and Admissions, PeopleSoft Campus Community, and PeopleSoft Student Records. Every delivered security view is set to a value of *None.* This means that no security is implemented (other than standard preexisting people search filters) until you modify this setting for every component that you want to secure. Familiarize yourself with the different levels of security that are available, and decide which levels work for the components at the institution.

Upon review of the delivered security views, evaluate and set the security-level settings for all components. Again, all delivered component views have the security level *None,* so you must update this value and assign data in the Security Views fields accordingly. You can modify these settings at any time, but you must run the Security Views Update process to activate the changes.

Note: PeopleSoft delivers security views setup data for some Financial Aid components and most of the Campus Community components within the Campus Community student-only menus. These secure views restrict access to student data for specific user IDs by institution, campus, career, program, and plan. Note that applying component security is optional, and applies only to schools that set up security for Financial Aid, Campus Community, and Enrollment Services tasks.

See Applying Demographic Data Access Security.

The following table lists the default settings for the Financial Aid components that have security views. These are the default component settings delivered on the Security Views page. All components in the table display the following security settings:

- **Security Level** = *No Security*
- **Global Security** = Yes (selected)

Component names with an asterisk (*) also display the following security setting: **Exclude Add Searchrecord** = Yes (selected).

Component Name	***No Security View***	***Institution Security View***	***Campus Security View***	***Career Security View***	***Program Security View***	***Plan Security View***
ANTICIPATED_AID	STDNT_ANT_SRCH1	STUAN1_INS_SCTY	SFA_SN1_CMP_STY	STUAN1_CAR_SCTY	STUAN1_PRG_SCTY	STUAN1_PLN_SCTY
ANTICIPTD_AID_EDIT	STDNT_ANT_SRCH2	STUAN2_INS_SCTY	SFA_SN2_CMP_STY	STUAN2_CAR_SCTY	STUAN2_PRG_SCTY	STUAN2_PLN_SCTY
ANTICIPTD_AID_SUMM	STDNT_ANT_SRCH2	STUAN2_INS_SCTY	SFA_SN2_CMP_STY	STUAN2_CAR_SCTY	STUAN2_PRG_SCTY	STUAN2_PLN_SCTY
AS_OF_STATUS	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_ACTIVITY	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_ENTRY_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_MANUAL_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_NOTIF_DETAIL	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_NOTIF_INQ	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_OVERRIDE_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_SUMMARY	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
DISBURSE_AID	STDNT_DISB_SRCH	STUDSB_INS_SCTY	SFA_SDB_CMP_STY	STUDSB_CAR_SCTY	STUDSB_PRG_SCTY	STUDSB_PLN_SCTY
DISBURSE_AID_WO	STDNT_DISB_SRCH	STUDSB_INS_SCTY	SFA_SDB_CMP_STY	STUDSB_CAR_SCTY	STUDSB_PRG_SCTY	STUDSB_PLN_SCTY

Component Name	***No Security View***	***Institution Security View***	***Campus Security View***	***Career Security View***	***Program Security View***	***Plan Security View***
FA_ EARNINGS	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
INST_ADD	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
ISIR_ADD_ SCHOOL	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
ISIR_AUDIT	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
ISIR_DELETE _PG	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
LOAN_FUND_ MAINT	LN_CL_FUND _SRCH	LNCLFN_INS_ SCTY	SFA_LCN_ CMP_STY	LNCLFN_CAR _SCTY	LNCLFN_PRG _SCTY	LNCLFN_PLN _SCTY
LOAN_ORIG*	LOAN_UPD_ SRCH	LN_UPD_INS_ SCTY	SFA_LUD_ CMP_STY	LN_UPD_CAR _SCTY	LN_UPD_PRG _SCTY	LN_UPD_PLN _SCTY
LOAN_ORIG_ TRANS	LN_CL_TRNS _SRCH	LNCLTR_INS_ SCTY	SFA_LCT_ CMP_STY	LNCLTR_CAR _SCTY	LNCLTR_PRG _SCTY	LNCLTR_PLN _SCTY
LOAN_STDNT _AWD	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
LOAN_TRANS _INQ	LOAN_UPD_ SRCH	LN_UPD_INS_ SCTY	SFA_LUD_ CMP_STY	LN_UPD_CAR _SCTY	LN_UPD_PRG _SCTY	LN_UPD_PLN _SCTY
REVIEW_ USER_EDITS*	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
RUN_ VERIFICATION	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
SFA_CRC_ PNOTE_ALT	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
SFA_CRC_ PNOTE_PLUS	STDNT_AID_ SRCH	TUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY
SFA_CRC_ PNOTE_STAF	STDNT_AID_ SRCH	STUAID_INS_ SCTY	SFA_STA_CMP _STY	STUAID_CAR _SCTY	STUAID_PRG _SCTY	STUAID_PLN_ SCTY

Component Name	*No Security View*	*Institution Security View*	*Campus Security View*	*Career Security View*	*Program Security View*	*Plan Security View*
SS_FA_AU_STATUS	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_AID_PACKAGE	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_AWD_PER_RSRC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_AWRD_CATG	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_AWRD_INQUIRY	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_BDGT_ADJUST	STDNT_AWDPER_VW	SAWPER_INS_SCTY	SFA_SWP_CMP_STY	SAWPER_CAR_SCTY	SAWPER_PRG_SCTY	SAWPER_PLN_SCTY
STDNT_BDGT_CALC	STDNT_BDGT_SRCH	STUBGT_INS_SCTY	SFA_SBG_CMP_STY	STUBGT_CAR_SCTY	STUBGT_PRG_SCTY	STUBGT_PLN_SCTY
STDNT_BUDGET_SUMM	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_DISB	STDNT_DISB_SCH2	STUDS2_INS_SCTY	SFA_SD2_CMP_STY	STUDS2_CAR_SCTY	STUDS2_PRG_SCTY	STUDS2_PLN_SCTY
STDNT_FA_TERM	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_FAN_ATRBT	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_PKG_VARS	STDNT_PKG_SRCH	STUPKG_INS_SCTY	SFA_SPG_CMP_STY	STUPKG_CAR_SCTY	STUPKG_PRG_SCTY	STUPKG_PLN_SCTY
STDNT_RESTRCTD_AID	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_TERM_BUDGET	STDNT_BDMT_SRCH	STUBMT_INS_SCTY	SFA_SBT_CMP_STY	STUBMT_CAR_SCTY	STUBMT_PRG_SCTY	STUBMT_PLN_SCTY

The following table lists the default settings for the Campus Community components in the student-only menus that have security views. These are the default component settings delivered on the Security Views page. All components in the table display the following security settings:

- **Security Level** = *No Security*
- **Global Security** = No (cleared)
- **Exclude Add Searchrecord** = No (cleared)
- **No Security View** = STUDENT_SRCH
- **Institution Security View** = CC_STU_INS_SCTY
- **Career Security View** = CC_STU_CAR_SCTY
- **Program Security View** = CC_STU_PRG_SCTY
- **Institution Security View** = CC_STU_PLN_SCTY

Component Name	***Menu Name***	***Application Designer Bar Name***
ADDRESS_MAINT	CC_BIO_DEMO_DATA_STDNT	USE
CC_ADDR_SEASONAL	CC_BIO_DEMO_DATA_STDNT	USE
CITIZEN_PASSPORT	CC_IDENTIFICATION_DATA_STDNT	USE
DRIVER_LIC_SA_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
ETHNIC_DTL_PERS	CC_BIO_DEMO_DATA_STDNT	USE
EXT_SYS_ID_PERS	CC_SERVICES_DATA_STDNT	USE
E_MAIL_ADDR_PERS	CC_BIO_DEMO_DATA_STDNT	USE
FERPA_ADMIN_QENTRY	CC_SERVICES_DATA_STDNT	USE
FERPA_DISPL_PERS	CC_SERVICES_DATA_STDNT	INQUIRE
FERPA_PERS	CC_SERVICES_DATA_STDNT	USE
HNR_AWD_PERS	CC_PARTICIPATION_DATA_STDNT	USE
IMMUNIZATN_HEALTH	CC_HEALTH_DATA_STDNT	USE
INST_REL_PERS	CC_SERVICES_DATA_STDNT	USE

Component Name	***Menu Name***	***Application Designer Bar Name***
LS_EXTRA_ACTIVITY	CC_PARTICIPATION_DATA_STDNT	USE
LS_PUBLICATIONS	CC_PARTICIPATION_DATA_STDNT	USE
NAMES_PERS	CC_BIO_DEMO_DATA_STDNT	USE
PEOPLE_ATHL_PERS	CC_PARTICIPATION_DATA_STDNT	USE
PEOPLE_PHTO_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
PHONE_PERS	CC_BIO_DEMO_DATA_STDNT	USE
PIN_PERS	CC_SERVICES_DATA_STDNT	USE
RELATIONSHIPS	CC_BIO_DEMO_DATA_STDNT	USE
RELIG_PREF_PERS	CC_BIO_DEMO_DATA_STDNT	USE
RESIDENCY_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
SA_DECEASED_DATA	CC_SERVICES_DATA_STDNT	USE
SCC_ACCOM_REQUEST	CC_HEALTH_DATA_STDNT	USE
SCC_BIO_DEMO	CC_BIO_DEMO_DATA_STDNT	USE
SCC_EMERG_CNTCT	CC_BIO_DEMO_DATA_STDNT	USE
SCC_HS_EXAM_AUDIO	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_EYE	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_PHYS	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_RESP	CC_HEALTH_DATA_STDNT	USE
SCC_IMPAIR_DTL	CC_HEALTH_DATA_STDNT	USE
SCC_LANGUAGES_PERS	CC_BIO_DEMO_DATA_STDNT	USE

Component Name	Menu Name	Application Designer Bar Name
SCC_LICENSE_CERT	CC_PARTICIPATION_DATA_STDNT	USE
SCC_MEMBERSHIPS	CC_PARTICIPATION_DATA_STDNT	USE
SERVICE_IND_PERS	MAINTAIN_SERVICE_IND_STDNT	USE
SSR_STDN_DATA_DEST	CC_BIO_DEMO_DATA_STDNT	USE
VISA_PERMIT_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
WORK_EXPERIENCE	CC_BIO_DEMO_DATA_STDNT	USE

Refer to the following book to learn more about how the system renders Application Designer menus through the portal.

See *PeopleTools: Application Designer Developer's Guide*

This table lists the default settings for the Enrollment Services components that have security views. If no menu or Application Designer Bar Name is listed, then the value for Global Security = Yes (selected).

Component Name	Menu Name	App. Designer Bar Name	No Security View	Institution Security View	Campus Security View	Career Security View	Program Security View	Plan Security View
ACADEMIC_DEGREE			STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ACAD_HISTORY_PERS	PROCESS_TRANSFER_CREDIT	USE	PEOPLE_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ACAD_PLAN			STDNT_CAR_SRCH	STUCAR_INS_SEC	SSR_SCR_CMP_SEC	STUCAR_CAR_SEC	STUCAR_PRG_SEC	STUCAR_PLN_SEC
ACAD_TST_RSLT_PERS	PROCESS_TRANSFER_CREDIT	USE	PEOPLE_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ACAD_TST_SUM_PERS	PROCESS_TRANSFER_CREDIT	INQUIRE	PEOPLE_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY

Component Name	***Menu Name***	***App. Designer Bar Name***	***No Security View***	***Institution Security View***	***Campus Security View***	***Career Security View***	***Program Security View***	***Plan Security View***
ADM_ APPL_ SUMM			PEOPLE_ SRCH	STDNT _INS_ SCRTY	No Campus security view delivered	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
APPOINT-MENTS			STDNT_ TERM_ SRCH	STUTRM_ INS_SEC	SSR_STM_ CMP_SEC	STUTRM_ CAR_SEC	STUTRM_ PRG_SEC	STUTRM_ PLN_SEC
CHKLST _SUMM_ PERS	TRACK_ STUDENT_ CAREERS	INQUIRE	STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
COMM_ SUMMARY _PERS	TRACK_ STUDENT_ CAREERS	INQUIRE	STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
ENRL_ REQUEST			ENRL _REQ_ SRCH	ENRLREQ _INS_SEC	SSR_ERQ_ CMP_SEC	ENRLREQ _CAR_SEC	ENRLREQ _PRG_SEC	ENRLREQ _PLN_SEC
HNR_AWD _EXT_ PERS	MANAGE_ ACADEMIC _ RECORDS	USE	STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
HNR_AWD _EXT_ PERS	TRACK_ STUDENT_ CAREERS	USE	STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
INSTR_ ADVSR_ PERS	DEFINE_ STUDENT_ RECORDS	SETUP	PEOPLE_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
OPR_3C_ SUM_PERS	TRACK_ STUDENT_ CAREERS	INQUIRE	STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
SERVICE_ IND_PERS	TRACK_ STUDENT_ CAREERS	USE	STDNT_ SRCH	STDNT _INS_ SCRTY	SCC_STU_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
STDNT_ ADVISOR			STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY

Component Name	Menu Name	App. Designer Bar Name	No Security View	Institution Security View	Campus Security View	Career Security View	Program Security View	Plan Security View
STDNT_ CAREER			STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
STDNT _CONS_ STAT			STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
STDNT_ ENRL_INQ			STDNT_ TERM_ SRCH	STUTRM_ INS_SEC	SSR_STM_ CMP_SEC	STUTRM_ CAR_SEC	STUTRM_ PRG_SEC	STUTRM_ PLN_SEC
STDNT_ GRADE_ INQ			STDNT_ TERM_ SRCH	STUTRM_ INS_SEC	SSR_STM_ CMP_SEC	STUTRM_ CAR_SEC	STUTRM_ PRG_SEC	STUTRM_ PLN_SEC
STDNT_ INCOMPLETE			STDNT_ INC_SRCH	STDINC_ INS_SEC	SSR_SIN_ CMP_SEC	STDINC_ CAR_SEC	STDINC_ PRG_SEC	STDINC_ PLN_SEC
STDNT_ TERM_ SEARCH			STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
STDNT_ XTRACT_ PERS			STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
STUDENT_ MILESTONE1			STDNT _MLST_ SRCH	STDMLST_ INS_SEC	SSR_SML_ CMP_SEC	STDMLST_ CAR_SEC	STDMLST_ PRG_SEC	STDMLST_ PLN_SEC
TERM_ HISTORY			STDNT_ SRCH	STDNT _INS_ SCRTY	SSR_STD_ CMP_STY	STDNT _CAR_ SCRTY	STDNT _PRG_ SCRTY	STDNT _PLN_ SCRTY
TSCRPT_ TEXT			STDNT _CAR_ SRCA	STUCAR_ INS_SEC	SSR_SCR_ CMP_SEC	STUCAR_ CAR_SEC	STUCAR_ PRG_SEC	STUCAR_ PLN_SEC

Once again, refer to the *PeopleTools: PeopleSoft Appliation Designer Developer's Guide* to learn more about how the system renders Application Designer menus through the portal.

The components below display the following security settings: **Exclude Add Searchrecord** = Yes (selected):

- ACAD_PLAN

- ENRL_REQUEST
- LOAN_ORIG
- REVIEW_USER_EDITS
- STUDENT_MILESTONE1

You can create additional security for components not included in the PeopleSoft-delivered set, using one of two methods:

- If the component already uses one of the search records listed in the previous table, add the component using the Security Views page and enter all of the corresponding views in the **Security Views** group box.

  Use the table as the template.

- If the component uses a search record other than those listed in the previous table, you can create modified security views for institution, campus, career, program, and plan security.

  Add the component using the Security Views page and enter all of its corresponding modified views in the **Security Views** group box.

Pages Used to Secure Access to Student Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Security Views	ES_SECURITY_TBL	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security Views** > **Security Views**	Set component security and identify student-related components to which you want to assign security. In addition, specify the level of security (institution, campus, career, program, plan) that you want to use.
Security Views Update	RUNCTL_SRSECVWU	**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Security Views Update** > **Security Views Update**	Run the Security Views Update process after you set up or alter security views. Create the Security Views summary report for all security views at the institution.
Search Criteria	SECURITY_AUDIT	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security View Change Audit** > **Search Criteria**	Specify search parameters for component security view changes.

Page Name	***Definition Name***	***Navigation***	***Usage***
Security Table	AUD_SECURITY_TBL	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security View Change Audit** > **Security Table**	Review security table audit information about security view changes that match the selection criteria specified on the Search Criteria page. This page displays any changes made to the Add Search record setting for the table.
Security Detail	AUD_SECURITY_DTL	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security View Change Audit** > **Security Detail**	Review security detail audit information about security view changes that match the selection criteria specified on the Search Criteria page. Security detail values correspond to the parent record on the Security Table page.
Advisement Report Security	SAA_SCRTY_AARPT	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Advisement Report Security** > **Advisement Report Security**	Set advisement reports security.

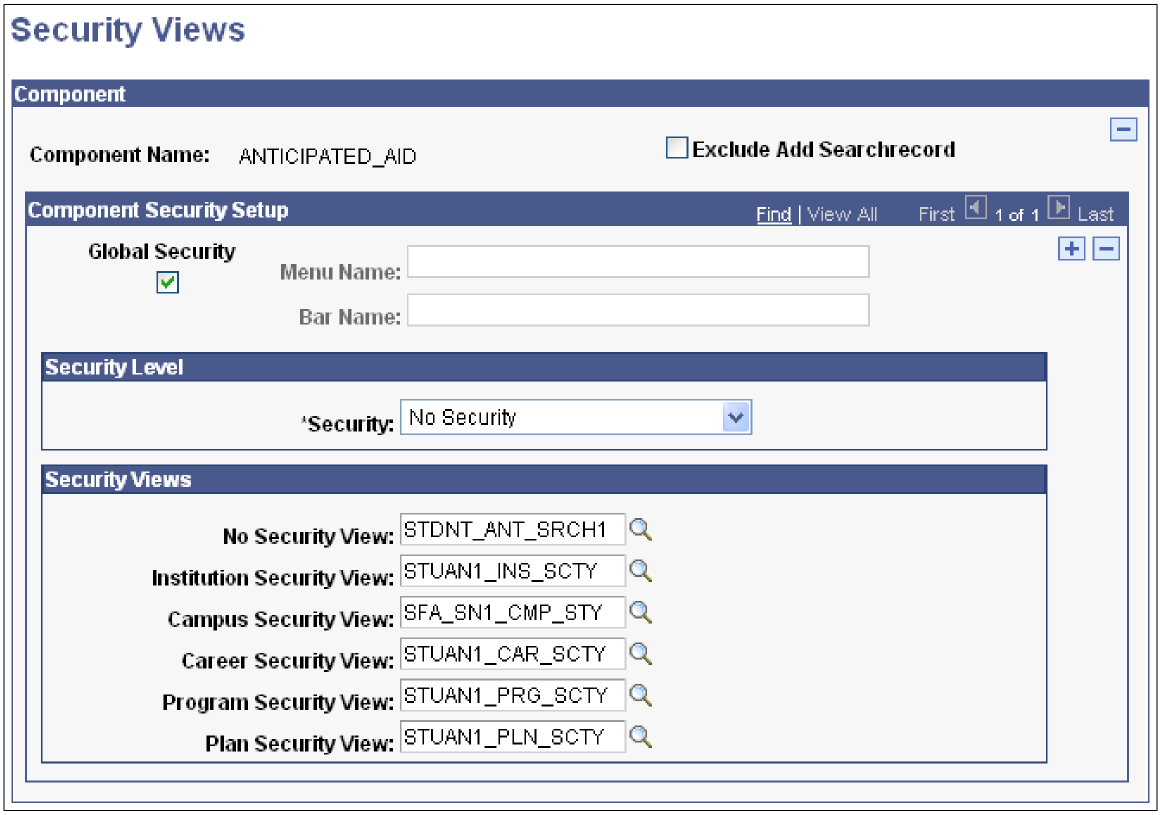
Setting Component Security

Access the Security Views page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security Views** > **Security Views**).

When you search for existing values before accessing this page, you can search by *Institution Security View.*

Note: Adding components to the Security Views page does not automatically secure them. After you have specified all necessary components and views on the Security Views page, run the Security Views Update process to implement the settings.

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



When a user attempts to access one of the components that you specify, the system checks the user's security for the institution, campus, career, program, or plan to verify that the user has permission to access the student data using the component. In some cases, the navigation is also verified.

Component

Field or Control	***Description***
Exclude Add Searchrecord	Select to run the Security Views Update process without updating the Add Searchrecord settings. **Note:** If the check box is cleared, you may inadvertently overwrite predefined Add Searchrecord views. Before running the Security Views Update process with the check box cleared, review the Add Searchrecord settings by running a query or by reviewing the Add Searchrecord settings in PeopleSoft Application Designer on the component Properties page. All delivered security view settings initially have this check box cleared, with the exception of ENRL_REQUEST components. To change this setting, do so before running the Security Views Update process.

Component Security Setup

Field or Control	*Description*
Global Security	Select to secure the component name everywhere that the component is used, regardless of the menu name or bar name. *Do not* select this check box if want to have different security views set up for the component, depending on the navigation path. For example, if you access the component through the portal by selecting **Records and Registration** > **3C's Summaries** you may want to clear the **Global Security** check box and enter the underlying menu structure for this component . Then, insert a second row that specifies unique security level and security view data for the component name if you access it by selecting Campus Community through the portal.
Menu Name	If you do not select the **Global Security** check box, this field is available for entry. Enter the particular menu name for which you want to apply this security view. Use this field to isolate a component name that is accessible using multiple navigation paths (for example, INSTR_ADVSR_PERS) when you want component security to vary depending on the navigation.
Bar Name	If you do not select the **Global Security** check box, the **Bar Name** field is available for entry. Enter the bar name that coincides with the selected menu name for which you want to apply this security view. Use this field to isolate a component name that is accessed by multiple navigation paths when you want component security to vary depending on the navigation.

Security Level

Field or Control	***Description***
Security	Use this field to select the security that you want to apply at this level for the component name. The level specified here determines which user IDs can access the component. For example, if you select *Program Level Security,* in the **Security** field, a user who attempts to access the specified component must have security set up on the Academic Program Security page for the same academic program as the student data that is accessed. In addition, if the user has access to careers and plans but has no user ID security set up for access to programs (and, in particular, the program of the accessed student data), then the user is denied access. Security level options are: *No Security:* Impose no security on the component name specified. Never delete a delivered component security view entry, even if the institution does not need it. Instead of deleting the security view entry for a particular component, set the Security field to *No Security.* *Institution Level Security:* Secure the component name at the institution level. This requires that a user attempting to access student data must have access to the student's institution. This user ID access is set up on the Academic Institution Security page. *Campus Level Security:* Secure the component name at the campus level. This requires that a user attempting to access student data must have access to the student's campus. This user ID access is set up on the Institution/Campus Security page. **Note:** While campus level security is available for all components; campus level security views are delivered only for the Financial Aid and Enrollment Services delivered components. *Career Level Security:* Secure the component name at the career level. This requires that a user attempting to access student data must have access to the student's career. This user ID access is set up on the Institution/Career Security page. *Program Level Security:* Secure the component name at the program level. This requires that a user attempting to access student data must have access to the student's program. This user ID access is set up on the Academic Program Security page.

Field or Control	Description
	Plan Level Security: Secure the component name at the plan level. This requires that a user attempting to access student data must have access to the student's plan. This user ID access is set up on the Academic Plan Security page. **Note:** Security Values are delivered with the PeopleSoft system as translate values. These translate values should not be modified in any way. Modification to these values requires significant programming effort.

Security Views

All of the security view settings delivered with the PeopleSoft system are provided as initial settings that you can alter to fit specific business needs *before* running the Security Views Update process.

The fields for delivered component name security views are populated with the appropriate security view (search record) based on the institution, campus, career, program, plan or no security setting in the **Security** field. Use of a particular view is determined by the selected security value. You can select any security value, based on your needs, and the corresponding security view is used. All of the security views fields prompt against all security records in the database, including records that you have modified.

You must enter a security view value for the corresponding level specified in the **Security** field. For example, if you specify *Program Level Security* in the **Security** field, then you must enter a value in the **Program Security View** field.

Field or Control	Description
No Security View	If *No Security* has been entered in the **Security** field, then you must enter a value in this field. The view that you enter is used to filter (not necessarily secure) the student data that is accessible through the component. For security views provided by PeopleSoft, this field is set to match each specific component. For example, the ACADEMIC_DEGREE component is delivered with a **No Security View** field setting of *PEOPLE_SRCH.* This is because the delivered search record for ACADEMIC_DEGREE is set to *PEOPLE_SRCH.* You can modify this value.

Field or Control	***Description***
Institution Security View	If *Institution Level Security* has been entered in the **Security** field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component. For most security views provided by PeopleSoft, this field is set to *STDNT_INS_SCRTY.* This value references the user ID security that is set up on the Institution Security page. You can modify this value.
Campus Security View	If *Campus Level Security* has been entered in the **Security** field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component. This value references the user ID security that is set up on the Institution/Campus Security page. You can modify this value. **Note:** While campus level security is available for all components; campus level security views are delivered only for the Financial Aid and Enrollment Services delivered components.
Career Security View	If *Career Level Security* has been entered in the **Security** field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component. For most security views provided by PeopleSoft, this field is set to *STDNT_CAR_SCRTY.* This value references the user ID security that is set up on the Institution/Career Security page. You can modify this value.
Program Security View	If *Program Level Security* has been entered in the **Security** field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component. For most security views provided by PeopleSoft, this field is set to *STDNT_PRG_SCRTY.* This value references the user ID security that is set up on the Academic Program Security page. You can modify this value.

Field or Control	Description
Plan Security View	If *Plan Level Security* has been entered in the **Security** field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component. For most security views provided by PeopleSoft, this field is set to *STDNT_PLN_SCRTY.* This value references the user ID security that is set up on the Academic Plan Security page. You can modify this value.

Note: Components based on search records other than PEOPLE_SRCH are delivered with settings different from those described here for Institution Security View, Campus Security View, Career Security View, Program Security View, and Plan Security View.

SQL Statements to Find Component Occurrences

You can use these Structured Query Language (SQL) select statements to find out the global and specific occurrences of a particular component:

- To identify components that have multiple menu paths, use this SQL Select statement:

  ```
  SELECT PNLGRPNAME, MENUNAME, BARNAME, ITEMLABEL FROM PSMENUITEM

  WHERE PNLGRPNAME = 'COMM_SUMMARY_PERS'
  ```

- To determine if a search record exists at the menu level, you can use either the PeopleSoft Application Designer Menu Item Properties page, or this SQL Select statement:

  ```
  SELECT PNLGRPNAME, SEARCHRECNAME FROM PSMENUITEM

  WHERE PNLGRPNAME = 'ACAD_PLAN'
  ```

  If a search record exists, the search record at the component level has no effect here. Consequently, the page is secured at the menu level using this search record.

- To identify the search record at the component level, you can use either the PeopleSoft Application Designer Component Properties page, or this SQL Select statement:

  ```
  SELECT PNLGRPNAME, SEARCHRECNAME FROM PSPNLGRPDEFN

  WHERE PNLGRPNAME = 'ACAD_PLAN'
  ```

  If a search record does not exist at the menu level, the search record at the component level is used to access and secure the page.

Running the Security Views Update Process and Report

Access the Security Views Update page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Security Views Update** > **Security Views Update**).

After you assign new security views to Financial Aid or Campus Community components, you must re-run the Security Views Update process to accommodate the new views.

Important! The first time all users log on to the system after you run the Security Views Update process, all PeopleTools data pertaining to pages is recached. Consequently, you should run this process at the same time that you run other major maintenance processes, rather than immediately before a heavy traffic period for the institution. Recaching pages slows initial page access for users. In addition, if you erroneously delete or modify security, it is better to discover the error during a system lull than during a peak admission, billing, or registration period.

Field or Control	Description
Report Only	Select to create the SA Security Views Update (student administration security views update) report (SRSECVWU) without updating security view access for components at the institution. If this check box is cleared, the process updates security view access *and* creates the Security Views report.
Run	Click to run the Security Views Update process (SRSECVWU) as needed. When you run this process, the system updates PS Lock (PeopleSoft lock) record.

The Security Views Update process allows you to move from menu-specific security view settings to global settings without the risk of creating inaccurate search record data. Specifically, the process:

- Removes the menu component search record override.
- Enables the system to use the component search record that was updated by the SQR.

Important! *Do not* run the update process until you are satisfied with all of the security views data, including the security views data delivered by Campus Solutions. Before you run the process, review all of the security views data settings thoroughly—paying close attention to the Exclude Add Searchrecord and Global Security options.

Specifying Search Parameters for Security View Changes

Access the Search Criteria page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security View Change Audit** > **Search Criteria**).

Field or Control	Description
Component	Enter the component object name to be audited for security. This field is required.
User ID	Enter the user ID that you want to audit. Leave this field blank to have the system retrieve all values for this field.
Start Date	Enter the earliest date to be audited. Leave this field blank to have the system retrieve all values for this field.

Field or Control	Description
End Date	Enter the latest date to be audited. Leave this field blank to have the system retrieve all values for this field.
View Changes Only	Clear this check box to have the system return all records with the action *Insert, Before, After,* or *Delete.* Select this check box to prevent the system from returning records with the action *Before.* This option controls before-and-after results. If you want to see only the values after the change, then select this check box. If you want to see the both the before and after values, then clear this check box.
Search	After you enter the selection criteria, click this button to return audit data to the Security Table page and the Security Detail page. To modify the data that the system returns, update the selection criteria and click this button again. **Note:** When you click this button, the retrieval process begins and the system displays the first page with data (either the Security Table page or the Security Detail page). If no changes were made to the table, the system displays the Security Detail page.

Reviewing Security Table Audit Information

Access the Security Table page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security View Change Audit** > **Security Table**).

Field or Control	Description
User ID	Displays the user ID of the person who made changes to the Security View table. For rows where the action is *Delete,* no user ID appears because the system does not track the user ID of the person who deletes a record. When deletions occur, the character string ******** appears in the **User ID** field.
Date/Time	Displays the date and time when the changes to the Security View table were made.

Field or Control	*Description*
Action	Values are: • *Insert:* Indicates that the user inserted a new row in the database. • *Delete:* Indicates that the user deleted a row from the database. • *Before:* Indicates an image of the record before it was updated. • *After:* Indicates an image of the record after it was updated.
Component	Displays the component that you selected as part of the search criteria.
Excl Add Srchrc (exclude add search record)	Displays the status of the Exclude Add Searchrecord option on the Security Views page. The values *Y* for selected and *N* for cleared indicate the status of the check box.

Reviewing Security Detail Audit Information

Access the Security Detail page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Security View Change Audit** > **Security Detail**).

Important! To record the security changes that the Security View Audit functionality audits, the IT team must first install and execute delivered SQL trigger files.

Refer to installation documentation on My Oracle Support.

Note: Column order may vary by implementation. All columns may not be visible. Use the horizontal scroll bar on the page to view all available columns.

Component Tab

Select the Component tab.

Field or Control	*Description*
User ID	Displays the user ID of the person who made changes to the Security View table. For rows where the action is *Delete,* no user ID appears because the system does not track the user ID of the person who deletes a record. When deletions occur, the character string ******** appears in the **User ID** field.

Field or Control	*Description*
Date/Time	Displays the date and time when changes to the Security View table were made.
Action	Values are: • *Insert:* Indicates that the user inserted a new row in the database. • *Delete:* Indicates that the user deleted a row out of the database. • *Before:* Indicates an image of the record before it was updated. • *After:* Indicates an image of the record after it was updated.
Component	Displays the component that you entered as part of the search criteria.
Menu Name	Displays the menu name entered on the Security Views page.
Bar Name	Displays the bar name entered on the Security Views page.

Security Tab

Select the Security tab.

Field or Control	*Description*
Gbl Scrty (global security)	Displays the status of the Global Security check box on the Security Views page. The values *Y* for selected and *N* for cleared indicate the status of the check box.

Field or Control	***Description***
Security	Displays the option entered in the **Security** field on the Security Views page. Options are: • *NON* (no access): *No Access* was entered on the Security Views page. • *INS* (institution): *Institution Level* was entered on the Security Views page. • *CMP* (campus): *Campus Level* was entered on the Security Views page. • *CAR* (career): *Career Level* was entered on the Security Views page. • *PRG* (program): *Program Level* was entered on the Security Views page. • *PLN* (plan): *Plan Level* was entered on the Security Views page.
No Security	Displays the view entered for the component in the **No Security View** field on the Security Views page.
Inst Security (institutional security)	Displays the view entered for the component in the **Institution Security View** field on the Security Views page.
Campus Security	Displays the view entered for the component in the **Campus Security View** field on the Security Views page.
Career Security	Displays the view entered for the component in the **Career Security View** field on the Security Views page.
Program Security View	Displays the view entered for the component in the **Program Security View** field on the Security Views page.
Plan Security	Displays the view entered for the component in the **Plan Security View** field on the Security Views page.

Setting Advisement Report Security

When the administrator uses the Request Advisement Reports page, the Generate Report Requests page, the Print batch Reports page or the Purge Report Results page, the type of advisement reports that can be accessed is specified on this page.

Access the Advisement Report Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Advisement Report Security** > **Advisement Report Security**).

Enter a report type for which the combination of user ID and academic institution has access.

Securing Academic Structure

To set up academic structure security, use these components: Academic Institution Security (SCRTY_TABL_INST), Institution/Campus (SCC_STY_TBL_CAMPUS), Institution/Career Security (SCRTY_TBL_CAREER), Academic Program Security (SCRTY_TABL_PROG), and Academic Plan Security (SCRTY_TBL_PLAN).

Securing the academic structure involves setting up security for academic institutions, academic institution and academic career combinations, academic institution and campus combinations, academic programs, and academic plans. It is important to set up security for academic institutions individually and jointly with campuses and academic careers because not all pages are keyed by both academic institution and campus/academic career, and not all campuses and careers are available for every institution.

This section provides an overview of academic structure security and discusses how to:

- Set security for academic institutions.
- Set security for institution and campus combinations.
- Set security for institution and career combinations.
- Set security for academic programs.
- Set security for academic plans.

See *PeopleTools: Security Administration*

Related Links

Understanding Academic Structure
Defining Academic Programs

Understanding Academic Structure Security

You secure the academic structure by user ID. Give each user ID access to the academic institutions, campuses, academic careers, academic programs, and academic plans that the user needs to work with in the system.

You complete these steps to assign academic structure security to a user:

1. Define high-level institution security on the Academic Institution Security page.
2. Define campus security by institution on the Institution/Campus Security page.
3. Define career security by institution on the Institution/Career Security page.
4. Define academic program security on the Academic Program Security page.

5. Define academic plan security on the Academic Plan Security page.

Pages Used to Secure Academic Structure

Page Name	***Definition Name***	***Navigation***	***Usage***
Academic Institution Security	SCRTY_TABL_INST	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Institution Security** > **Academic Institution Security**	Set security to determine the academic institutions that a user can access.
Institution/Campus Security	SCC_STY_TBL_CAMPUS	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Institution/Campus Security** > **Institution/ Campus Security**	Set security for institution and campus combinations to determine the combinations that a user can access.
Institution/Career Security	SCRTY_TBL_CAREER	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Institution/Career Security** > **Institution/ Career Security**	Set security for institution and career combinations to determine the combinations that a user can access.
Academic Program Security	SCRTY_TABL_PROG	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Program Security** > **Academic Program Security**	Set security to determine the academic programs that a user can access for the selected institution and career combination.
Academic Plan Security	SCRTY_TBL_PLAN	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Plan Security** > **Academic Plan Security**	Set security to determine the academic plan that a user can access for the selected academic institution.

Setting Security for Academic Institutions

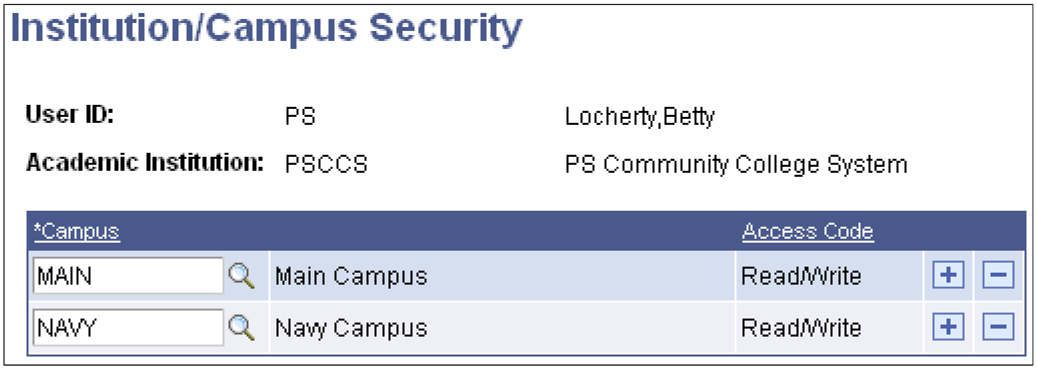
Access the Academic Institution Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Institution Security** > **Academic Institution Security**).

Field or Control	***Description***
Academic Institution	Enter an academic institution to grant the user ID access. You must list all academic institutions that the user ID can access.

Setting Security for Institution and Campus Combinations

Access the Institution/Campus Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Institution/Campus Security** > **Institution/Campus Security**).

This example illustrates the fields and controls on the Institution/Campus Security page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Campus	Enter a campus to assign to the user ID for the selected academic institution. List all the campuses that the user ID can access for the selected academic institution. If a user ID is associated with more than one academic institution, enter campus information separately for each institution.

Note: This setup is used only in the Security Views Update process. No other functionality (security) is associated with this setup.

Setting Security for Institution and Career Combinations

Access the Institution/Career Security page ((**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Institution/Career Security** > **Institution/Career Security**).

Field or Control	*Description*
Academic Career	Enter an academic career to assign to the user ID for the selected academic institution. List all of the academic careers that the user ID can access for the selected academic institution. If a user ID is associated with more than one academic institution, enter career information separately for each institution.

Setting Security for Academic Programs

Access the Academic Program Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Program Security** > **Academic Program Security**).

Field or Control	*Description*
Academic Program	For the selected academic institution and academic career combination, enter the specific academic programs that the user ID can access. If a user ID is associated with more than one institution and career combination, enter program information separately for each combination.

Setting Security for Academic Plans

Access the Academic Plan Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Plan Security** > **Academic Plan Security**).

Field or Control	*Description*
Academic Plan	For the selected academic institution, enter the specific academic plans that the user ID can access. If a user ID is associated with more than one academic institution, enter academic plan information separately for each user ID and academic institution combination.

Securing Academic Organizations

To set up academic organization security, use the Update Security - Acad Orgs component (RUN_SA505) and the Academic Org Security component (SCRTY_TABL_ACAD).

This section provides overviews of academic organization security trees, security versus organizational structures, and creation of new security trees and discusses how to:

- Update the security tree.
- Granting and restricting access in the security tree.

Understanding Academic Organization Security Trees

Online security is a critical issue in any organization. Because most data in Campus Solutions is confidential, you must specifically designate the data that users can see. To do that, you use an academic organization security tree, which is a security structure that graphically represents the hierarchies of organizational units in an institution. With the security tree, you can view and update the reporting relationships among units and grant and deny user access to data. You can also track changes over time by creating new trees with different effective dates. To set up data security, you create security trees that are based on hierarchies of organizational entities. Using PeopleSoft Tree Manager, you can build a new security tree showing organizational entities such as universities, institutions, and academic departments.

The primary advantage of using a hierarchy for academic organization security is that you do not have to define access rules for every organizational entity. Consequently, updating security access is faster than it would be if you had to update user access for each entity. And with a hierarchy, you can more easily deny access to a particular entity.

Each academic organization that you add to the academic organization security tree has a unique identifier —the academic organization code—which you create on the Academic Organization Table page.

After you create the academic organization security tree, you run the Update Security-Acad Orgs process that links the effective date of the tree structure with the Academic Organization Security table, in which you grant user access to academic organizations. This ensures that the security rules use the tree with up-to-date academic organization hierarchies. You then run the Tree Auditor process to crosscheck the Academic Organization table and the security tree to ensure that the academic organization data matches.

Use the Academic Organization Security table to grant or restrict user access to academic organizations. When you grant users access to an academic organization, you automatically grant them access to data in any academic organization that reports—directly or indirectly—to that academic organization, unless you selectively restrict access to a specific organization.

When you use the security structure that is delivered with Campus Solutions, you grant and deny user access to academic organization data using the same user IDs and roles that the system administrator creates.

See *PeopleTools: Tree Manager*

See *PeopleTools: Security Administration* “User Profiles”

Related Links

Understanding Academic Structure

Understanding Security Versus Organizational Structures

Though you use the organizational structure as the foundation for the data security structure, the two structures are not—and should not be—the same. The primary difference between the organizational structure and the data security structure is that you continue to maintain inactive academic organizations in the security structure. You must do this so that users can retrieve historical data associated with the inactive academic organizations.

Unlike an organization chart, a security tree has these characteristics:

- One security tree can be in effect at a time.

  Historical security is irrelevant to user access.

- Inactive academic organizations always appear in security trees.

  Otherwise, data in defunct academic organizations would be inaccessible.

To use trees for reporting purposes to accurately reflect an academic organization chart at a particular point in time, do not use the academic organization security tree. Instead, create a separate academic organization tree. As the organization changes, you can create new effective-dated versions of the academic organization tree. Then, you can easily create queries that extract data from hierarchies, which accurately reflect the academic organization structure at a fixed point in time.

In the steps described for creating an academic organization security tree, it is assumed that you have a hierarchy using academic organizations from the Academic Organization table to grant and deny access to user IDs. This is the structure delivered with Campus Solutions, and it works well if you use the academic organization structure as the basis for the security structure—that is, users should view only specific portions of data, in certain organizational chunks, and the organizational entities are hierarchical.

Note: Base the security structure on *current* security needs. For example, you might have only a few users using Campus Solutions for the first six months of implementation. Consequently, you would not need to set up complex security hierarchies at that point. With a simple security hierarchy, you achieve enhanced system performance. When security needs change—for example, when more users begin using the system—you can easily adapt the security structure.

Understanding the Security Tree Creation Process

PeopleSoft Tree Manager offers a powerful visual means to build a security hierarchy for all organizational entities. A tree hierarchy is a quick, graphical method of granting and restricting user access to data in Campus Solutions. You do not have to perform regular audits to prevent circular or conflicting relationships among units, as you do with code-based security. The security hierarchy prevents such relationships from occurring in the first place.

You retain the logical groupings of the hierarchy, such as institutions and academic departments, by representing them as *levels* in the academic organization security tree. The groupings represent a security hierarchy, but they do not have to match the organizational chart.

You use levels and academic organizations to create a hierarchy of security access. For example, users who can access information for *UNIV* (university) can access information for all academic organizations in the institution. On the other hand, users who are granted access to information in *ENGR* (engineering) can access information for only the School of Engineering.

From within PeopleSoft Tree Manager, you can view and update existing academic organization data, and you can create new academic organizations. Double-click an academic organization to open the Academic Organization Table page, which contains data for that particular academic organization.

You organize a tree by adding or moving limbs. Whenever you must change the security hierarchy for academic organizations, make a new effective-dated copy of the tree and move limbs to other locations. This practice makes the maintenance of organizational security easier and more accurate. When you add an academic organization to the tree, PeopleSoft Tree Manager links to the Academic Organization table, where you review specific information on the academic organization.

Creating a New Tree

You complete these steps to create a new security tree:

1. Define the tree structure.

Identify the page definitions, record definitions, and fields for the underlying database tables where tree data is stored.

2. Define the tree for ACAD_ORGANIZATION on the Tree Definition page.
3. (Optional) Specify organizational levels.
4. Define security for academic organizations on the Academic Org Security page.

See product documentation for PeopleTools: PeopleSoft Tree Manager

Related Links

Defining Academic Organizations

Pages Used to Secure Academic Organizations

Page Name	***Definition Name***	***Navigation***	***Usage***
Update Security – Acad Orgs (update security – academic organizations)	RUNCTL_ASOFDATE	**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Update Security – Acad Orgs** > **Update Security – Acad Orgs**	Link the academic organization security tree to academic organization security so that the system recognizes the current effective-dated academic organization security tree.
Academic Org Security (academic organization security)	SCRTY_TABL_ACAD	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Org Security** > **Academic Org Security**	Grant and restrict access to data for a user ID.

Updating Security Trees

Access the Update Security – Acad Orgs page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Update Security – Acad Orgs** > **Update Security – Acad Orgs**).

Field or Control	***Description***
As Of Date	Enter the date that the new academic organization security tree becomes active. The Update Security - Acad Org process searches for the academic organization security tree that has an effective date closest to, but not greater than, this date and makes that the active security tree.

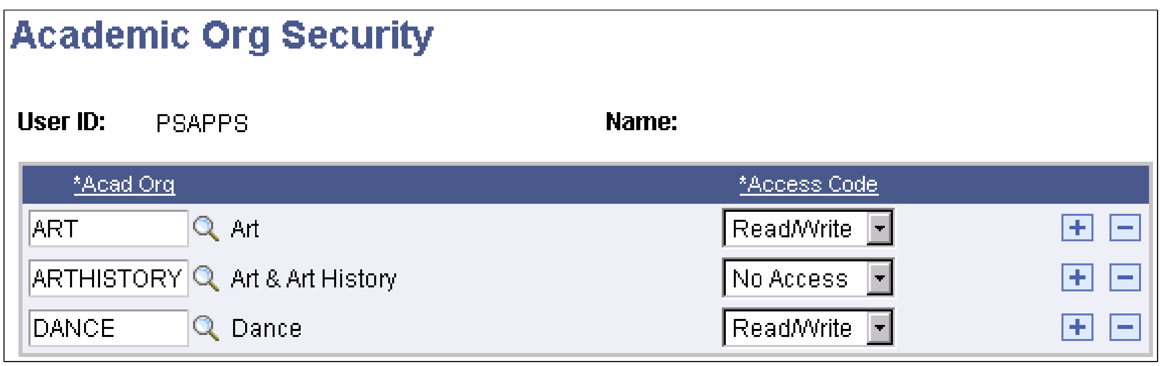
Field or Control	*Description*
Run	Run the Update Security - Acad Org (update security - academic organization) process (SR505) as needed. Run this process the first time that you create an academic organization security tree, any time that you create an academic organization security tree with a different effective date, and any time that you make a change to the current academic organization security tree.

Important! Because only one academic organization security tree can be in effect at any particular point in time, be sure to run this process only on the date that the new tree takes effect—not before. For example, if the new security tree has an effective date of January 1, 2005, you should run this process on January 1, 2005. The system uses whatever tree has an effective date closest to, but not greater than, the date you enter in the **As Of Date** field.

Granting and Restricting Access in Security Trees

Access the Academic Org Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Org Security** > **Academic Org Security**).

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



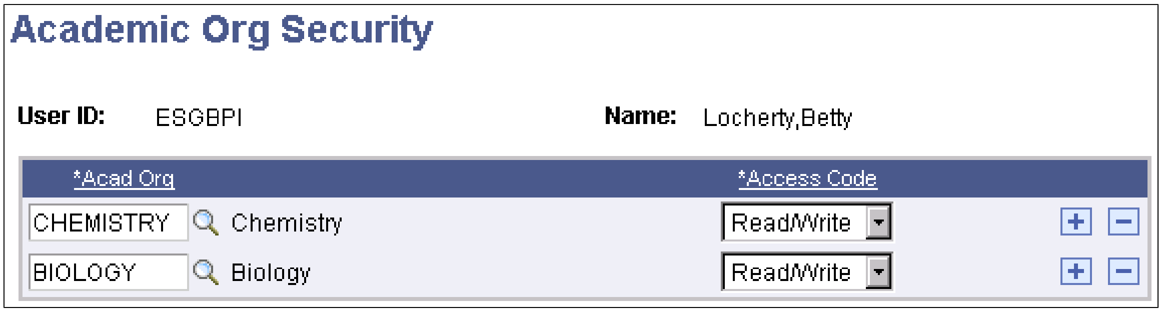
Enter the highest academic organization in the hierarchy that the user ID should be able to access. Insert rows to add academic organizations or to restrict access to a particular academic organization lower in the hierarchy.

Academic organization security is based on the hierarchy in the academic organization security tree. The academic organization that you identify here must be a node on the academic organization security tree. Granting access to one node of the academic organization tree also provides access to all child nodes for that organization. To restrict access to a child node, select the academic organization that you want to secure and set the access code to *No Access.*

Example 1

This security setup grants the user ID access to all academic organizations under the Biology and the Chemistry nodes in the security tree:

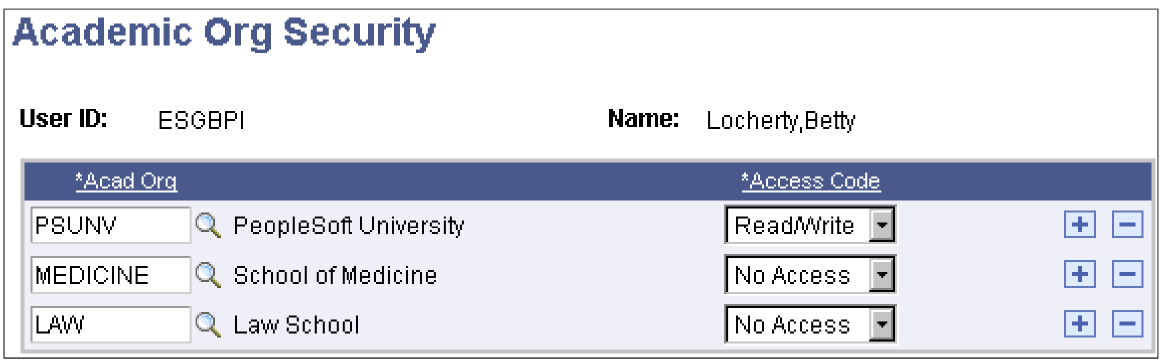
This example illustrates the fields and controls on the Permission for specific academic organizations (SCRTY_TABL_ACAD). You can find definitions for the fields and controls later on this page.



Example 2

This security setup grants this user ID access to all academic organizations under the PeopleSoft University node *except* any that fall under the School of Medicine or Law School node:

This example illustrates the fields and controls on the Permission with restrictions for academic organizations (SCRTY_TABL_ACAD). You can find definitions for the fields and controls later on this page.



The School of Medicine and Law School are excluded because the access code is set to *No Access*.

Chapter 17

Securing Campus Community

Setting Up 3C Group Security

To set up 3C group security, use the 3C Group Security component (OPR_GRP_3C_TABLE).

You can select which 3C groups user IDs can view, update and delete. The Campus Community 3C engine also uses the security that you set up here. Associating a user ID with specific 3C groups allows the user access to specific communication categories, checklist codes, and comment categories. The 3C Deletion process cannot process the user's request to delete 3C items if the Deletion Indicator for the relevant 3C group has not been selected for the user ID.

This section lists a prerequisite and discusses how to grant 3C group security.

Prerequisite

Before you set up 3C group security, set up 3C groups and complete the security setup for your institution.

Related Links

"Defining 3C Groups" (Campus Community Fundamentals)
Securing Access to Student Data

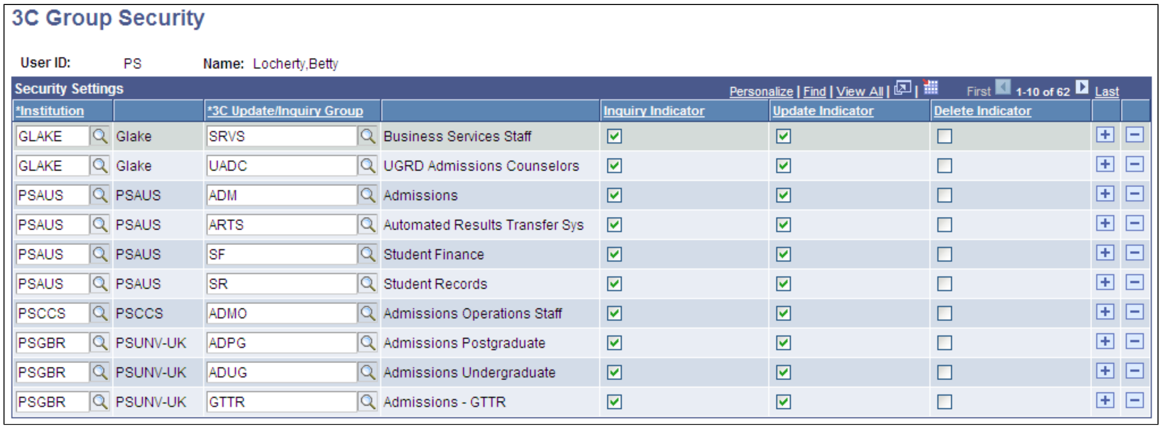
Page Used to Set Up 3C Group Security

Page Name	*Definition Name*	*Navigation*	*Usage*
3C Group Security	OPR_GRP_3C_TABLE	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **3C Group Security** > **3C Group Security**	Grant user access to 3C group information.

Granting 3C Group Security

Access the 3C Group Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **3C Group Security** > **3C Group Security**).

This example illustrates the fields and controls on the 3C Group Security page. You can find definitions for the fields and controls later on this page.



Security Settings

Field or Control	***Description***
Institution	Enter an institution. Only institutions to which this user ID has access are available.
3C Update/Inquiry Group	Enter the 3C group that the user ID should have access to for the selected institution. The 3C groups are defined on the Group 3C Table page (GRP_3C_TABLE page).
Inquiry Indicator	Select to enable the user ID to *view* all data in the 3C group. The inquiry indicator is used to widen or narrow searches on 3C inquiry pages throughout the system. For example, a user that has inquiry access to a certain 3C group will only be able to view the communications, checklists, or comments assigned to an individual or to an organization that is tied to the 3C group.
Update Indicator	Select to enable the user ID to update, by entering or altering, data in the 3C group. You should also select this check box if you want the user ID to be able to process 3C items by using the 3C engine. If the user ID does not have update access to the 3C group, the 3C engine does not process a request by using the 3C group. This functionality is similar to the way the system manages manual assignments for communications, checklists, or comments.

Field or Control	Description
Delete Indicator	Select to enable the user ID to delete data in the 3C group. You should also select this check box if you want the user ID to be able to delete 3C items by using the 3C Deletion process. If the user ID does not have delete access to the 3C group, the 3C Deletion process does not process a request by using the 3C group. This functionality is similar to the way the system manages manual assignments for communications, checklists, or comments. To be able to delete data, a user must have Update access. If a user is a member of more than one 3C group and at least one of the groups is enabled for 3C Deletion, then the user is also enabled. **Note:** 3C Deletion Policy Manager does not consider 3C group security.

Setting Up Service Indicator Security

To set up service indicator security, use the Service Indicator Security component (SCRTY_TABL_SRVC) and the Service Indicator Display (SCC_SI_DISP_ROLE) component..

This section lists a prerequisite and discusses how to:

- Grant placement and release access to service indicators.
- Restrict display of service indicators.

Note: Service Indicator Security is not applied to Self-Service Student Center pages.

Prerequisite

Before you set up service indicator security, set up service indicators in the Service Indicator table.

Related Links

“Setting Up Service Impacts” (Campus Community Fundamentals)
“Setting Up Service Indicator Codes and Reasons” (Campus Community Fundamentals)

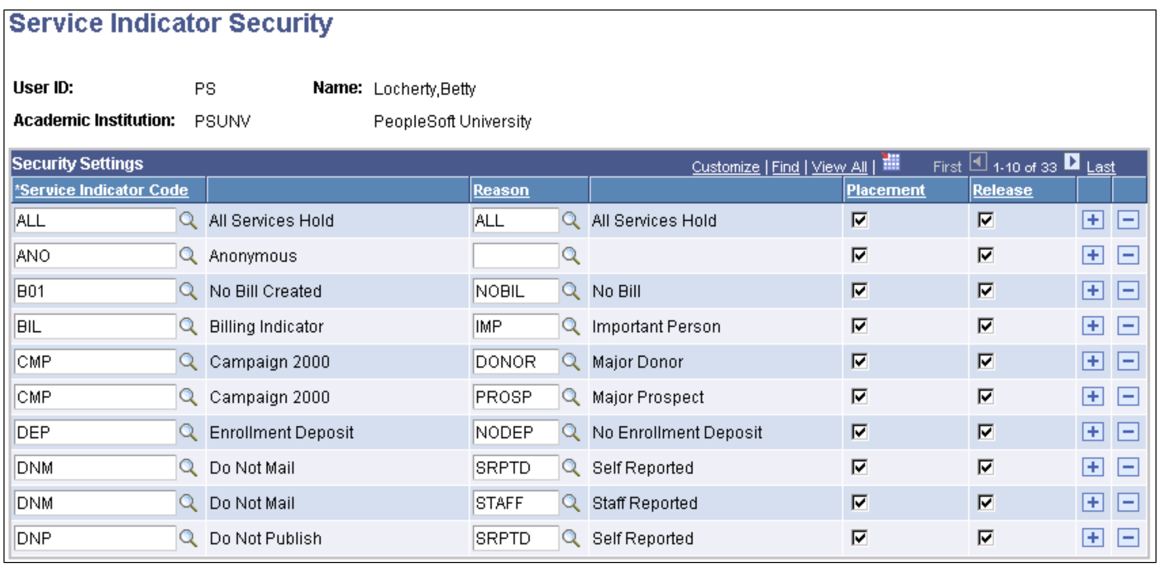
Pages Used to Set Up Service Indicator Security

Page Name	***Definition Name***	***Navigation***	***Usage***
Service Indicator Security	SCRTY_TABL_SRVC	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Service Indicator Security** > **Service Indicator Security**	Grant placement and release access to service indicators for a user ID for a particular institution.
Service Indicator Display	SCC_SI_DISP_ROLE	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Service Indicator Display** > **Service Indicator Display**	Restrict view access to service indicators on administrative pages to specific roles.

Granting Placement and Release Access to Service Indicators

Access the Service Indicator Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Service Indicator Security** > **Service Indicator Security**).

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



Security Settings

Field or Control	***Description***
Service Indicator Code	Enter a code for each service indicator that the user ID should be able to place or release. To restrict the use of a service indicator by reason, enter multiple rows for the service indicator and enter the different reasons that apply. You define service indicator codes inside the Service Indicator Table.
Reason	Enter a reason indicating when the user ID can access the service indicator. You must enter a reason for each indicator. For example, if the user ID should be able to use the conference guest service indicator only for football recruitment visits or Special Olympics guests, select each of those reasons for the conference guest service indicator. Define the reasons for using a service inside the Service Indicator table.
Placement and **Release**	Select if this user ID should have permission to assign or release the service indicator.

Restricting Display of Service Indicators

Access the Service Indicator Display page ((**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Service Indicator Display** > **Service Indicator Display**).

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

Restrict Display to Roles

To restrict the display of a service indicator's data to specific roles, enter the one or more roles for whom the data should appear. The system displays the data only for the roles that you specify, and does not display it for any role not listed.

If you do not want to restrict the display, ensure that no role is listed. When no role is listed on the Service Indicator Display page, the service indicator data is unrestricted and the system displays it for all roles.

Service indicator data includes the service indicator icon on pages for IDs to which the indicator is assigned, and the service indicator information on the Service Indicator Summary page and the **General Info** tab of the Student Services Center component.

Note: A user's placement or release security takes precedence over restricted display. If the display of a service indicator is restricted, but the user has place or release access for that service indicator, then the service indicator data will appear for that user whether or not the user has any of the restricted display roles.

Setting Up Data Privacy

Campus Solutions delivers fields that have been determined as personally identifiable, sensitive, or both, along with the component or page references that indicate where each field appears in the system.

If your institution has other fields that contain data you consider to be personally identifiable or sensitive, then:

1. Add these fields using the Maintain Data Privacy Settings page.
2. Run the Update References process to update the component and page references for the new fields you added. You can also run this process to generate query references to indicate when a personally identifiable or sensitive field is referenced in a query.

See *PeopleSoft Enterprise Components*, Data Privacy Framework.

Replacing User Security

To copy or assign Campus Solutions user security, use the User Security Replacement component (SCRTY_OPRID_REPLAC) or the Mass User Security Replacement component (SCC_MASS_SCRTY_UPD).

Copying a security setup is the same as going to each appropriate menu and entering data for each security object to assign security for a specific user. Replacement security automates the process for you by enabling you to copy a security profile either to another individual user or to several users in mass.

This section discusses how to:

- Replace user security for an individual.
- Replace user security for multiple individuals.

Note: User security replacement described here applies only to Campus Solutions user security. It does not apply to PeopleTools security.

Pages Used to Replace User Security

Page Name	***Definition Name***	***Navigation***	***Usage***
User Security Replacement	SCRTY_OPRID_REPLAC	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Security Replacement** > **User Security Replacement**	Copy the security setup of one user to another user.
Mass User Security Replacement	SCC_MASS_SCRTY_UPD	**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Mass User Security Replacement** > **Mass User Security Replacement**	Assign or copy a security profile to an individual user or to a group of users.

Replacing User Security for an Individual

Access the User Security Replacement page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Security Replacement** > **User Security Replacement**).

Replacement User

Field or Control	***Description***
Default Replacement User	To replace or create all of a user ID's security objects with the same security objects assigned to another user ID, specify the user ID whose security objects you want to copy in this field. When you exit the field, the system automatically copies each security object from the replacement user ID. If you do not want to replace each of this user's security objects with all the security objects of one user ID, indicate the replacement user ID for each object that you want to replace. You do not have to replace all objects. For those objects that you do not want to replace, leave the field blank.

Field or Control	*Description*
User Preferences	When you enter a user ID in this field, the default values that you set up in the User Default component for the entered user ID are assigned to the user ID, including the enrollment override defaults which assigns the Enrollment Access ID. User defaults are set up in the User Defaults component. See Entering User Defaults.
3C Group Security	When you enter a user ID in this field, the system also sets the values on the User 3C Group Summary page of the User Defaults component.

When you enter a user ID in any of the other fields on this page, the user ID is assigned the same security that you set up for the selected user ID for that item. All of these fields refer to the security that you set up on the pages in **Set Up SACR** > **Security** > **Secure Student Administration** > **User ID.**

Replacing User Security for Multiple Individuals

Access the Mass User Security Replacement page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Mass User Security Replacement** > **Mass User Security Replacement**).

Population Selection

Enter the tool and related parameters for selecting the population of user IDs to which you want to assign this user security or replace the existing security.

Fields in the **Population Selection** group box on this page function the same as they do in the **Population Selection** group box across the system.

See "Using the Population Selection Process" (Campus Community Fundamentals)

Replacement User

Enter the user ID whose security you want to mass assign to the user IDs selected by Population Selection. You can modify any of the user security values to assign.

Fields in the **Replacement User** group box function the same as described for the same group box on the User Security Replacement page.

Applying Demographic Data Access Security

To set up demographic data access (DDA) security, use the Demographic Data Access component (PERS_MSK_CFG) and the Demographic Data Access process component (RUNCTL_MSK_CFG).

This section provides overviews of DDA security and setting up DDA security, and discusses how to:

- Define DDA masking configurations.
- Run the DDA process.

Understanding DDA Security

With DDA security, you can mask the display of national ID and birth date data in search records, prompt records, and on the Bio/Demo Data and the Relationships pages if these pages have display-only security. You can mask entire fields, the first five characters of the national ID field, or the year of the birth date field. You can apply masking to one, both, or neither field. No matter which masking configuration you use, users can search on the entire national ID field.

Note: To enhance the flexibility of masking for the National ID and birth date in Search/Match functionality, see Search/Match display options. National ID and birth date data are not masked in queries and reports.

See “Understanding Search/Match” (Campus Community Fundamentals)

See “Setting Up Search/Match” (Campus Community Fundamentals)

To apply DDA security, you define masking configurations for all primary permission lists and assign a primary permission list to each user ID as part of his or her User Profile.

For example, suppose a primary permission list assigned to a user ID is named ALLPANLS. You might not want national IDs to appear throughout the system for this permission list, but you do want partial birth dates to appear. You would access the Demographic Data Access setup page and insert a row for the ALLPANLS permission list. In that row, you would configure the system to both mask the entire national ID and display a partial birth date field (masking the year).

You must then run the Demographic Data Access (MSK_CFG) process to replace data in the masking configuration table with the masking configuration that you defined. The new configuration will be applied to each user to whom that permission list is assigned.

In the example, after running the Demographic Data Access process, each user whose primary permission list is ALLPANLS will not see national IDs on search pages or prompts, but they will see the birth month and day where birth dates appear. The masking configuration for the primary permission list to which a user is assigned also controls how national ID and birth date data appear on the Bio/Demo Data page (SCC_BIO_DEMO_PERS) and the Relationships page (RELATIONSHIPS) throughout the system.

Note: The national ID and the birth date fields appear masked on the Biographical Details page and the Relationships page only for users who have security set to show the pages in display-only mode. If a user has more than one permission list and, therefore, has both add/update and display-only access to a masked page, then the least restrictive setting (add/update) takes precedence, and masking is not applied.

Setting Up DDA Security

To set up DDA security, you must assign a primary permission list to each user ID, grant administrative access to components for managing DDA, and define masking configurations for each primary permission list.

Note: All Campus Solutions search records and prompts depend on DDA security. Therefore, you must assign a primary permission list to each user, even those who do not need the national ID and the birth date fields masked. In the latter case, set the masking configurations in the primary permission list for both the National ID and the Date of Birth to *Display entire field.*

Pages Used to Apply DDA Security

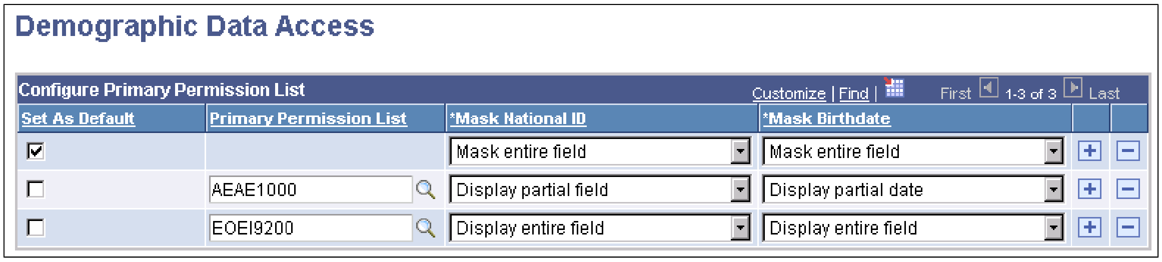
Page Name	***Definition Name***	***Navigation***	***Usage***
General	USER_GENERAL	**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **General**	Assign a primary permission list to a user ID.
Pages	ACL_MENU2	**PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists** > **Pages**	Grant access to new components for managing DDA masking configurations for each primary permission list. Grant access to new Student components for users that should prompt only against Students.
Demographic Data Access (setup)	PERS_MSK_CFG	**Set Up SACR** > **Security** > **Secure Student Administration** > **Permission List** > **Demographic Data Access** > **Demographic Data Access**	Define masking configurations for primary permission lists.
Demographic Data Access (run control)	RUNCNTL_MSK_CFG	**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Demographic Data Access** > **Demographic Data Access**	Initialize the primary permission list configuration for all primary permission lists assigned to users.

See *PeopleTools: Security Administration*

Defining DDA Masking Configurations

Access the Demographic Data Access (setup) page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Permission List** > **Demographic Data Access** > **Demographic Data Access**).

This example illustrates the fields and controls on the Demographic Data Access (setup) page. You can find definitions for the fields and controls later on this page.



Important! Each time you make changes to the Demographic Data Access page, you must run the DDA process to apply the changes.

Configure Primary Permission List

Field or Control	***Description***
Set As Default	Select to assign this masking configuration to all permission lists used as primary permission lists. When selected, the **Primary Permission List** field becomes unavailable.
Primary Permission List	Insert a row for each primary permission list that requires a masking configuration different than the default masking configuration. When you run the process, the system applies this masking configuration to all users to whom this primary permission list is assigned.
Mask National ID	Enter the configuration to use for national IDs. Values are *Display entire field, Display partial field,* and *Mask entire field.* If you display a partial field, the system masks the first five characters of the national ID field. These translate values should not be modified.

Field or Control	Description
Mask Birthdate	Enter the configuration to use for birth dates. Values are*Display entire field, Display partial date,* and *Mask entire field.* If you display a partial date, the system masks the year and displays month and day in the default date format for each birth date field. These translate values should not be modified.

Running the DDA Process

Access the Demographic Data Access (run control) page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Demographic Data Access** > **Demographic Data Access**).

You must run the DDA process (MSK_CFG) to apply changes made on the Demographic Data Access (setup) page and to apply the default masking configuration to any newly created, newly assigned primary permission list whose masking configuration is not otherwise defined.

Note: The process applies the masking configuration only for permission lists that are used as "primary" permission lists. Therefore, if you assign a User ID a primary permission list that was not used as the primary the last time the DDA process was run, you will need to run the process again.

Securing and Setting Up the Population Update Process

To secure and set up the Population Update process, use the Population Update Security (SCC_POP_UPD_SRTY) component and the Population Update Setup (SCC_POP_UPD_SETUP) component

This section discusses how to:

- Assign Population Update user security.
- Set up the Population Update process.

Related Links

“Understanding the Population Update Process” (Campus Community Fundamentals)

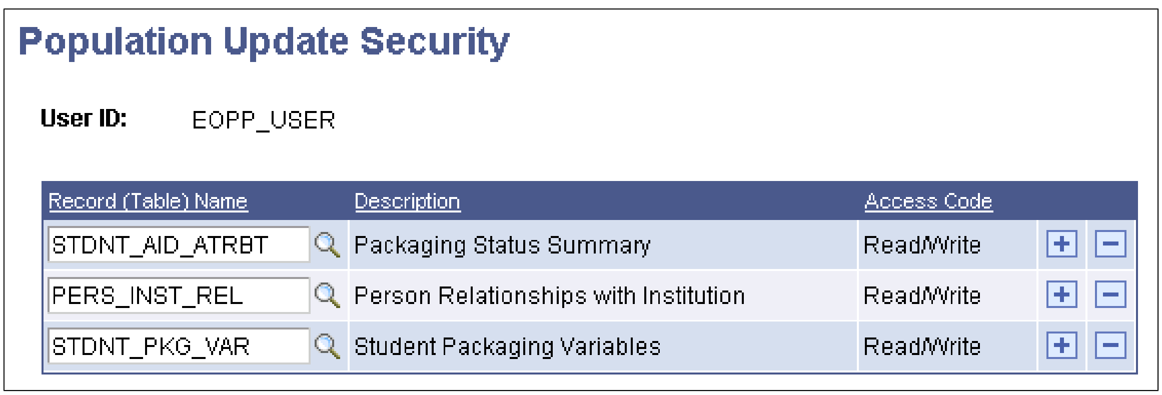
Pages Used to Secure and Set Up the Population Update Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Population Update Security	SCC_POP_UPD_SRTY	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Population Update Security** > **Population Update Security**	Set user security for accessing records to update using the Population Selection update process.
Population Update Setup	SCC_POP_UPD_SETUP	**Set Up SACR** > **System Administration** > **Utilities** > **Population Update** > **Population Update Setup** > **Population Update Setup**	Identify records and fields to make available for updating.

Assigning Population Update User Security

Access the Population Update Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Population Update Security** > **Population Update Security**).

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

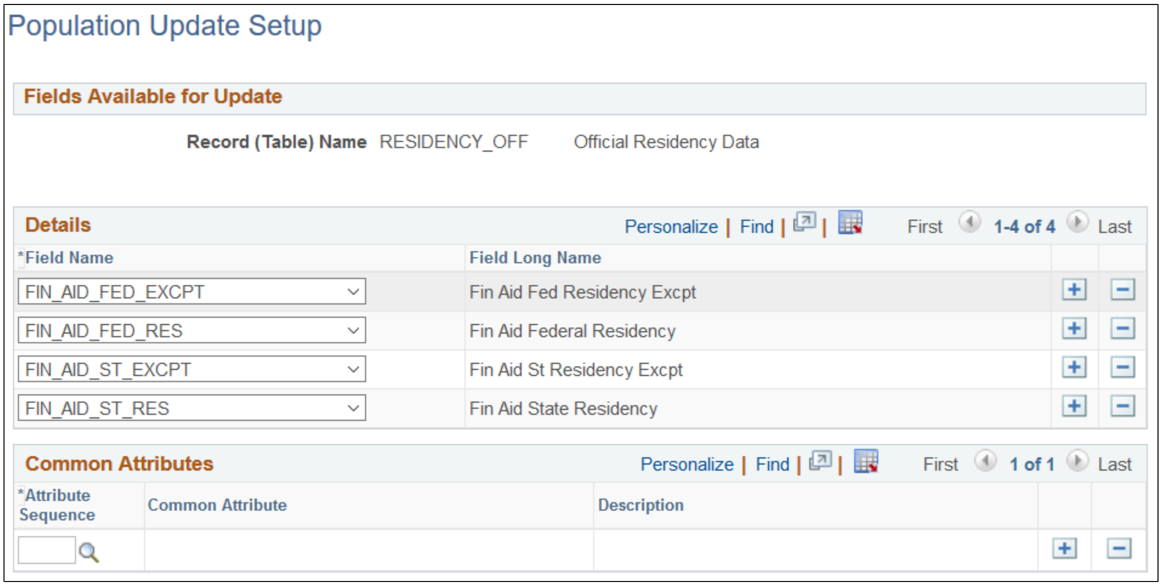


Field or Control	***Description***
Record (Table) Name	Enter each record that you want the user to be able to update for populations selected by the Population Selection process. After you save the page, the user can view and update the records if your institution or department makes them available for updating on the Population Update Setup page.

Setting Up the Population Update Process

Access the Population Update Setup page (**Set Up SACR** > **System Administration** > **Utilities** > **Population Update** > **Population Update Setup** > **Population Update Setup**).

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



When you select a record and access the Population Update Setup page, the system makes the fields from that record available in the **Field Name** drop-down lists. Select each field that you want to make available for users to update. Only the records and fields that you select and to which the user has security access will be available on the run control page.

Common Attributes

Use this region to assign attributes to the record. This controls which attributes are available for you to select when you run the update process.

Related Links

"Running the Population Update Process" (Campus Community Fundamentals)

Chapter 18

Securing Recruiting and Admissions

Understanding Recruiting and Admissions Security

This section lists common elements and discusses recruiting and admissions security.

Common Elements Used

Field or Control	***Description***
Access Code	This value is set to *Read/Write,* which gives the user both read and write access.
All Access	Click to assign access to all recruiting centers, application centers, admissions program actions, or test IDs for the selected user ID and institution combination.

Recruiting and Admissions Security

You secure prospect data through the recruiting center, and you secure applicant data through the application center. Access to prospect data or applicant data is given to a user ID by granting access to specified recruiting centers or application centers. If the user ID is not associated with a particular recruiting center, the user ID cannot access prospect data associated with that recruiting center. The same is true for accessing applicant data for a particular application center. You also give access to user IDs for specific program actions, which are associated with recruiting and admissions. In addition, you grant users access to test IDs to control the users who can work with external test data.

Setting Security for Recruiting Centers

To set up recruiting center security, use the Recruiting Center Security component (SCRTY_RECR_CENTER).

This section lists prerequisites and discusses how to assign recruiting center access.

Prerequisites

Before you set security for recruiting centers:

- Set up academic institutions and recruiting centers.
- Set up institution security.

- Set up institution and career security.

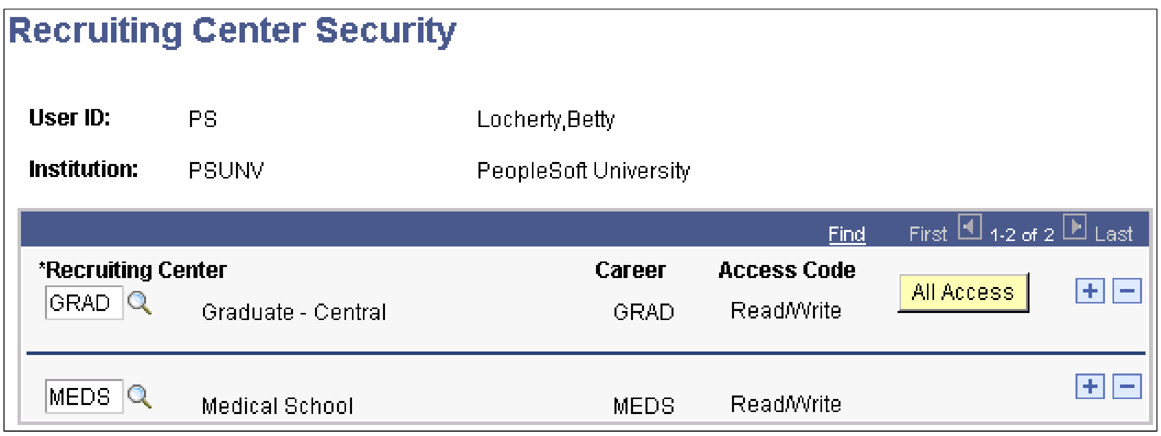
Page Used to Set Security for Recruiting Centers

Page Name	*Definition Name*	*Navigation*	*Usage*
Recruiting Center Security	SCRTY_RECR_CENTER	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Recruiting Center Security** > **Recruiting Center Security**	Assign recruiting center access to a specified user ID for an institution.

Assigning Recruiting Center Access

Access the Recruiting Center Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Recruiting Center Security** > **Recruiting Center Security**).

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



Enter a recruiting center that the combination of user ID and institution can access. The career associated with the recruiting center appears if you added it when you set up the recruiting center.

Setting Security for Application Centers

To set up application center security, use the Application Center Security component (SCRTY_APPL_CENTER).

This section lists prerequisites and discusses how to assign application center access.

Prerequisites

Before you set security for application centers:

- Set up academic institutions and application centers.
- Set up institution security.

Page Used to Set Security for Application Centers

Page Name	*Definition Name*	*Navigation*	*Usage*
Application Center Security	SCRTY_APPL_CENTER	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Application Center Security** > **Application Center Security**	Assign application center access to a specified user ID for an institution.

Assigning Application Center Access

Access the Application Center Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Application Center Security** > **Application Center Security**).

Enter an application center that the combination of user ID and institution can access. The career associated with the application center appears if you added it when you set up the application center.

Setting Security for Admissions Actions

To set up admissions actions security, use the Admissions Action Security component (SCRTY_ADM_ACTION).

This section lists a prerequisite and discusses how to assign program action security.

Prerequisite

Before you set security for admissions actions, set up program actions.

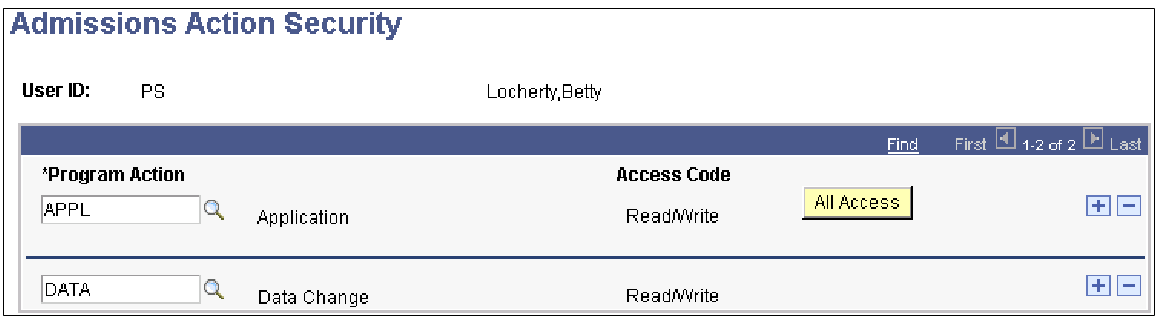
Page Used to Set Security for Admissions Actions

Page Name	*Definition Name*	*Navigation*	*Usage*
Admissions Action Security	SCRTY_ADM_ACTION	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Admissions Action Security** > **Admissions Action Security**	Assign the admissions program actions that a user ID can access. Users have access only to the program actions entered on this page. Only program actions used by Recruiting and Admissions are available. These program actions are entered on Add Application, Maintain Applications, Action/Reason Entry, and Program Addition.

Assigning Program Action Security

Access the Admissions Action Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Admissions Action Security** > **Admissions Action Security**).

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



Enter a program action that the user ID can access.

Setting Security for Test IDs

To set up test ID security, use the Test ID Security component (SAD_TEST_SCTY).

This section provides an overview of test ID security, lists prerequisites, and discusses how to assign test ID security.

Understanding Test ID Security

User ID based security for test IDs now ensures users access and process only the test data for which they have permission. Because the menus for the Load Processes and the Suspense pages have been consolidated, users must enter a test ID to access the correct pages. This security will also determine what test scores the user will see in Test Results and Academic Test Summary.

Select the test IDs for which a user has Read/Write security on the Test ID Security page. The system enforces test ID security on the following components:

- Test Results component.
- Academic Test Summary component.
- External Test Score Load component.
- External Test Score Suspense component.
- Search/Match/Post Test Scores component.
- Test Score Candidate Data component
- External Test Score Purge component.

For example, to review suspense data, users navigate to the External Test Score Suspense component. To review posted test data, users navigate to the Test Score Candidate Data component. Users enter the test ID that they want to review (and for which they have test ID security), and the appropriate pages appear.

Prerequisites

Before you can assign test ID security, you must define test IDs on the Test Tables page.

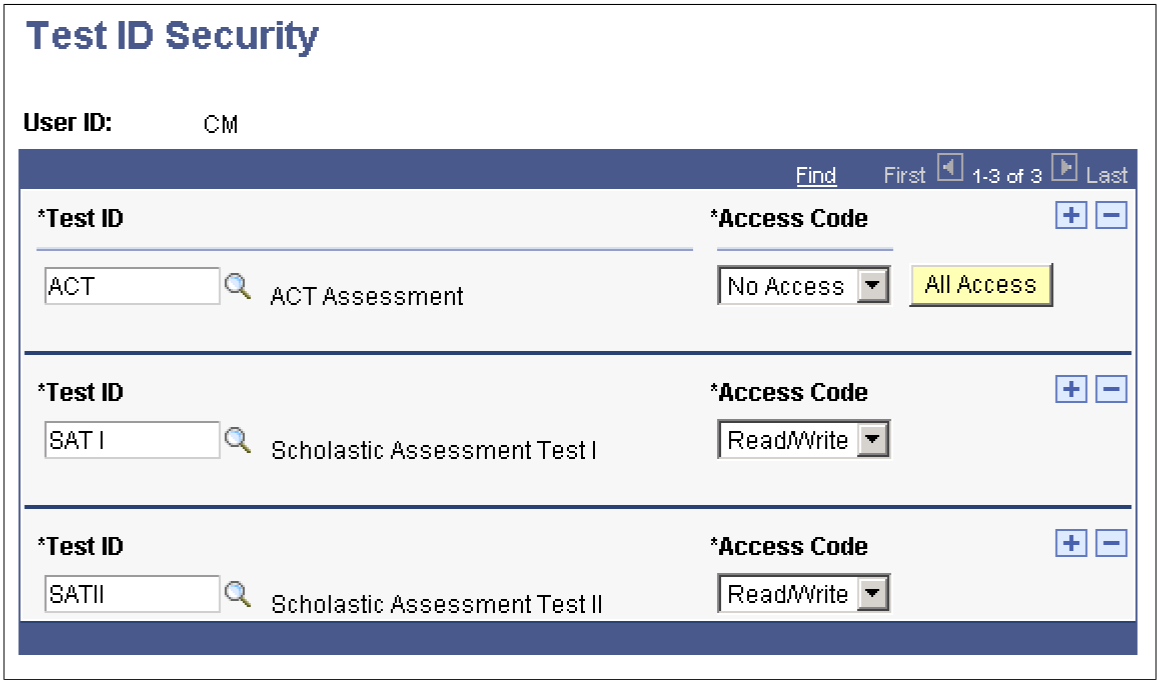
Page Used to Assign Security for Test IDs

Page Name	***Definition Name***	***Navigation***	***Usage***
Test ID Security	SAD_TEST_SCTY	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Test ID Security** > **Test ID Security**	Assign the test IDs that a user can access. The system enforces test ID security in several components throughout the system.

Assigning Test ID Security

Access the Test ID Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Test ID Security** > **Test ID Security**).

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



Field or Control	***Description***
Test ID	Enter a test ID to grant or limit access to it. You define test IDs on the Test Tables page.

Chapter 19

Securing Student Records

Understanding Student Records Security

Student Records security setup includes access to enrollment, program actions, and transcript types. You enable security for program actions and transcript types by specifying which program actions and transcript types a user ID is allowed to access.

Enrollment security is more complicated and includes setting up enrollment access IDs and enrollment access groups. An enrollment access ID determines the time period when a user can perform certain enrollment functions and the type of overrides to which a user has access. An enrollment access group determines which types of students a user can enroll. It also controls the courses in which a user can enroll a student. You can add enrollment access IDs to enrollment access groups to limit the time period when the user can perform enrollment functions for the types of students.

Enrollment access IDs or enrollment access groups are assigned to user IDs for administrative users. For student self-service users, you assign enrollment access IDs to permission lists, which are assigned to students.

Prerequisites

Before you set up enrollment access IDs, you must complete the following tasks for each term within an academic career:

- Set up the time periods and associate them with sessions.

  Several time periods are delivered with Campus Solutions and you can add other time periods if needed.

- Set up valid time periods for every academic career on the Time Period Table page.
- Attach time periods to sessions and specify the dates for each time period for the sessions within a term on the Session Time Periods page.

Related Links

Defining Session Time Periods

Setting Up Enrollment Access IDs

To set up enrollment access IDs, use the Enrollment Security Table component (SAD_TEST_SCTY).

Enrollment access IDs determine when users can perform certain enrollment functions during a specified time period. For example, you can allow advisors to enroll students in classes only during the first two weeks of classes. Enrollment access IDs can also include overrides to allow the user to override certain enrollment rules—for example, to override a class size limit. You assign enrollment access IDs to user IDs for administrative users and to permission lists for student self-service users.

Set up enrollment access IDs for the different groups of people who work with student enrollment. Create groups based on the different type of access that the people in these groups should have for each enrollment function. Groups might include advisors, clerks in the registrar's office, and registrar staff. Each group should have different types of access. You must also create enrollment access IDs to be used specifically for self-service enrollment.

This section discusses how to:

- Define access for enrollment functions.
- Define enrollment overrides.

Related Links

Setting Up Enrollment Security for Self-Service Enrollment

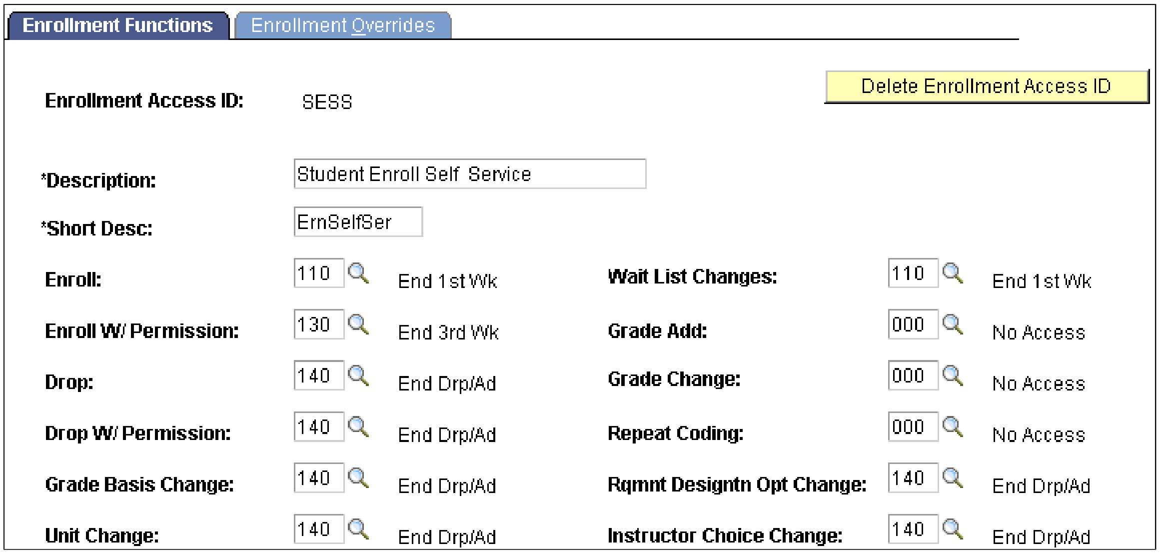
Pages Used to Set Up Enrollment Access IDs

Page Name	***Definition Name***	***Navigation***	***Usage***
Enrollment Functions	ENRMT_OVRD_TBL	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Security Table** > **Enrollment Functions**	Define access for enrollment functions by creating enrollment access IDs and assigning time periods to various enrollment functions. The time periods define when the enrollment access IDs can access each function. You attach these enrollment access IDs to user IDs, permission lists, and enrollment access groups.
Enrollment Overrides	ENRMT_OVRD_TBL2	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Security Table** > **Enrollment Overrides**	Define the enrollment overrides that the enrollment access ID can use.

Defining Access for Enrollment Functions

Access the Enrollment Functions page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Security Table** > **Enrollment Functions**).

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



For each enrollment access ID that you create, you grant access to enrollment functions by attaching a time period code to each enrollment function. Time period codes determine when the enrollment access ID has access to the specific enrollment action. Use time period code *999* to grant unrestricted access, and use time period code *000* to give no access.

Field or Control	***Description***
Enroll	Enter a time period code for enrolling a student.
Enroll W/Permission (enroll with permission)	Enter a time period code for enrolling a student in a class after the regular enrollment period is over. A student needs permission to enroll in this period. **Important!** If you set the **Enroll W/Permission** field to time period *999* (unrestricted time access), the system always grants access to a user connected to this enrollment access ID when that user attempts to enroll with or without permission, regardless of the time period associated with the **Enroll** field.
Drop	Enter a time period code for dropping a student.
Drop W/Permission (drop with permission)	Enter a time period code for dropping a student from a class after the regular drop period is over. A student needs permission to drop a class during this period.
Grade Basis Change	Enter a time period code for changing a student's grading basis for a class.
Unit Change	Enter a time period code for changing units.

Field or Control	*Description*
Wait List Changes	Enter a time period code for changing to a student's waiting list position.
Grade Add	Enter a time period code for adding a grade for a student.
Grade Change	Enter a timer period code for changing a grade for a student.
Repeat Coding	Enter a time period code for attaching a repeat code to a student for a class. The repeat code is found on the enrollment processing pages.
Rqmnt Designtn Opt Change (requirement designation option change)	Enter a time period code for changing requirement designations for a student's class.
Instructor Choice Change	Enter a time period code for changing instructors for a class, if this option is set up for the class.
Delete Enrollment Access ID	Click to delete this enrollment access ID. After you click the button, you can still cancel the deletion.

Processing Steps

When the enrollment engine verifies that a user can perform a certain enrollment function, it:

- Retrieves the user's enrollment access ID.
- Checks which enrollment function the user is trying to complete, such as enroll or drop.
- Applies the time period associated with the enrollment function on the Enrollment Functions page, using the user's enrollment access ID.

  The enrollment engine also evaluates the overrides to which a user has access.
- Accesses the Session table and retrieves the end date for the time period.
- Compares the system date with the end date for the time period.

  If the system date is less than or equal to the end date for the time period, the system grants access for the enrollment function.

Example

Suppose that you want to enroll a student in a class scheduled in the regular academic session. The regular academic session time period 110 has an end date of August 29, 2005. If the action date for the enrollment is greater than August 29, 2005, the system denies access to the enrollment function. If you have defined an enroll-with-permission time period (for example, time period 120), the system requires permission for enrollment.

Defining Enrollment Overrides

Access the Enrollment Overrides page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Security Table** > **Enrollment Overrides**).

Select the override options that the enrollment access ID is permitted to use. The overrides that you select here are used on the Enrollment Request page for users assigned the enrollment access ID.

Is Allowed To Override

Field or Control	***Description***
Appointment	Select to allow override of appointment date and time to modify the appointment maximum enrollment units.
Unit Load	Select to allow override of any unit limits, minimum or maximum. These include unit load for appointment, term and session unit load, term and session course count load, term and session *No GPA* units, term and session *Audit* units, wait list units, and the minimum unit enrollment verification.
Time Conflict	Select to allow override of class section time conflict checking.
Action Date	Select to make the Action Date field available so you can enter a different processing date.
Requirement Designation (override requirement designation)	Select to allow adding a requirement designation for a class that does not have one. Also, select to allow omitting a requirement designation that is required.
Career	Select to allow override of academic career pointers and career pointer exception rules.
Service Indicator	Select to allow override of any holds that the student has so that enrollment is allowed.
Requisites	Select to allow override of requisite checking.
Closed Class	Select to allow enrollment in classes that are closed due to capacity size (full class section, combined section, or reserve capacity sizes). Also select to allow placing a student on the waiting list if waiting list capacity is full.

Field or Control	*Description*
Class Links	Select to allow an add or drop without all the required related component sections in a class association group. Select also to allow enrollment into a nonenrollment type section and to allow multiple enrollments in a course.
Class Units	Select to allow override of course units for either fixed or variable units.
Grading Basis	Select to allow override of the grading basis established for the class.
Class Permission	Select to allow override of class consent—for general permission or student-specific permission—to enroll in a class.
Dynamic Dates	The system populates this field by default with a value of 'N'. A DMS script sets the value to 'Y' for those access IDs that allow access to all existing overrides. Review your security setup and set this value accordingly.
Wait List Okay	Select to allow the addition of a student to the waiting list of a class section when the class section, combined section, or reserve capacity is full.

Setting Up Enrollment Access Groups

To set up enrollment access groups, use the Enrollment Group Access component (ENRL_GROUP_ACCESS).

This section provides an overview of enrollment access groups and discusses how to:

- Define students for enrollment group access.
- Define access to courses and assign enrollment access IDs.

Understanding Enrollment Access Groups

You use enrollment access groups to allow or restrict enrollment access to groups of students; for example, undergraduate athletes or students in the law career. You can define student groups using any combination of academic institutions, academic careers, academic programs, academic plans, and student groups. You can further restrict enrollment for the student group by assigning enrollment access IDs to limit the time periods when certain enrollment functions are allowed. In addition, you can restrict the enrollment for the student group to courses from a certain academic organization, to specific course catalog numbers, or to specific sessions.

You can also set up enrollment access groups that deny access to a particular group of students or that deny enrollment to particular courses—for example, courses of a particular academic organization, courses with particular catalog numbers, or courses in particular sessions. If you set up an enrollment access group that denies access to groups of students, that enrollment access group cannot be used to provide access to a different group of students. Similarly, if you deny access to particular types of courses for groups of students, you cannot add other rules that allow access to those types of courses.

Prerequisites

Before you can set up enrollment access groups, you must:

- Set up the academic institutions, academic careers, academic programs, academic plans, and student groups.
- Set up enrollment access IDs, academic organizations, course catalog, and session information.

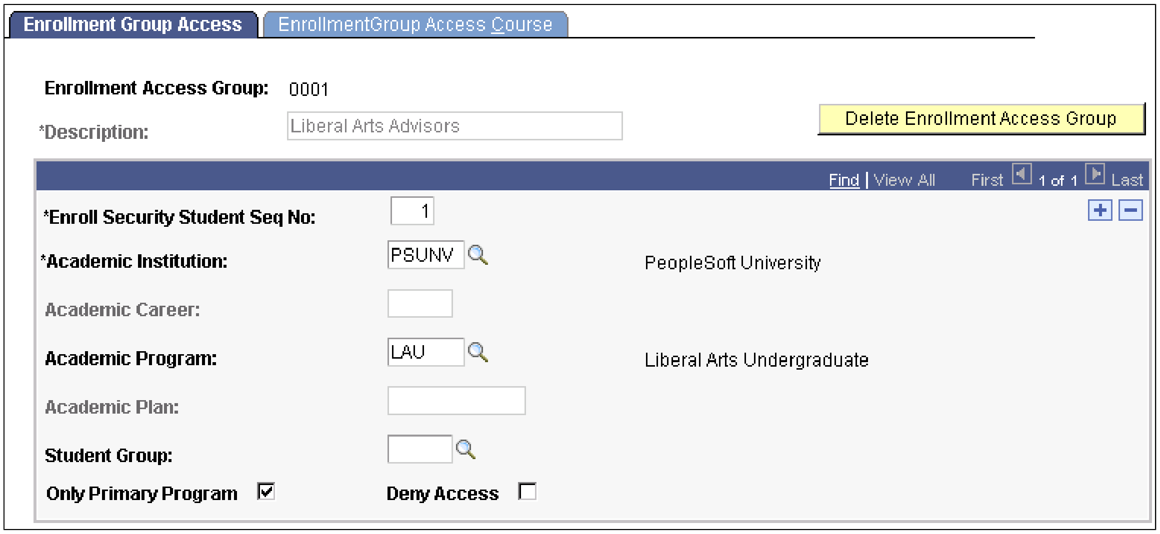
Pages Used to Set Up Enrollment Access Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Enrollment Group Access	ENRL_GROUP_ACCESS	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Group Access** > **Enrollment Group Access**	Define students for enrollment group access.
Enrollment Group Access Course	ENRL_GROUP_ACCESS2	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Group Access** > **Enrollment Group Access Course**	Define access to courses for the student group created on the Enrollment Group Access page. You can also assign an enrollment access ID to the student group.

Defining Students for Enrollment Group Access

Access the Enrollment Group Access page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Group Access** > **Enrollment Group Access**).

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



Field or Control	***Description***
Description	Enter the description for the enrollment access group. You can only enter a description in this field for a new value. After the page is saved, you cannot change the description.
Delete Enrollment Access Group	Click to delete this enrollment access group. After you click the button, you can still cancel the deletion.
Enroll Security Student Seq No (enrollment security student sequence number)	Displays a counter for each group of students that you define. When you insert additional rows to define parameters for additional student groups, the number increments by one. This field appears on the Enrollment Group Access Course page so that you can define the course information for each group.
Academic Institution	Enter the academic institution that this enrollment access group can access.
Academic Career	Enter the academic career within the selected academic institution that this enrollment access group can access. If you select an academic career, you cannot select an academic program or academic plan.
Academic Program	Enter the academic program within the selected academic institution that this enrollment access group can access. If you select an academic program, you cannot select an academic career or academic plan.
Academic Plan	Enter the academic plan within the selected academic institution that this enrollment access group can access. If you select an academic plan, you cannot select an academic career or academic program.

Note: You can specify only an academic career, an academic program, *or* an academic plan. You cannot specify a combination of these.

Field or Control	*Description*
Student Group	Enter the student group that this enrollment access group can access. You define student groups in Student Records.
Only Primary Program	Select to grant access only to students whose primary academic program matches the academic program selected. If you select this check box, the user cannot access students whose secondary academic program matches the academic program selected. This check box is available only if you entered a value in the **Academic Program** field.
Deny Access	Select to deny access to the specified group of students. If you select **Deny Access** for one group of students (identified by the enrollment security student sequence number), you deny access for any subsequent groups of students that you define for the enrollment access group.

Warning! When this page is saved, the selected access for the enrollment access group becomes effective immediately.

Defining Access to Courses and Assigning Enrollment Access IDs

Access the EnrollmentGroup Access Course page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **Enrollment Group Access** > **EnrollmentGroup Access Course**).

Field or Control	*Description*
Student Seq No (student sequence number)	Displays the enrollment security student sequence number. This is the same field used to count the student groups defined on the Enrollment Group Access page. For each student group, you can define different parameters.
Course Seq No (course sequence number)	This counts each set of parameters for course enrollment—enrollment access ID, academic organization, catalog numbers, and sessions—for each student sequence number. For example, for a particular group of students, you might allow enrollment in two academic organizations. In this case, you would have two course sequence numbers, one to define each academic organization.

Field or Control	*Description*
Enrollment Access ID	Enter an enrollment access ID if you want to attach a defined set of allowable enrollment functions and overrides to the enrollment access group. You define enrollment Access IDs on the Enrollment Functions page. **Enrollment Access ID** is not a required field. If you do not enter an enrollment access ID on this page, all enrollment functions are allowed for all time periods during the session for the students and courses specified for the enrollment group access. **Note:** You can select any combination of the **Enrollment Access ID** field, the **Academic Organization** field, the **Catalog No From** (catalog number from) field, the **Catalog No To** (catalog number to) field, the **Session From** field, and the **Session To** field. Each of these fields creates different parameters for limiting enrollment of the student group.
Academic Organization	Enter an academic organization in which you want to allow the student group to enroll. If you do not select any value, then the student group can be enrolled in classes in any academic organization, unless you specify a catalog number range.
Catalog No From (catalog number from) and **Catalog No To** (catalog number to)	Enter the catalog number range in which you want to allow the student group to enroll. Entering a catalog number range allows students in the defined student group to enroll in courses within the range. If you want to include more than one range of catalog numbers, add another row to define the second catalog number range.
Session From and **Session To**	Enter the session range in which you want to allow the student group to enroll. You can include more than one range of sessions by adding a row.
Deny Access	Select to prevent enrollment in the selected parameters. For example, if you select the **Deny Access** check box, the range of the courses selected is the courses in which the student group *cannot* be enrolled. All other courses would be available. If you select the **Deny Access** check box for one course sequence number, select it for any subsequent course sequence numbers that you define for the student group. Each student group has its own student sequence number. **Note:** You do not need to select an enrollment access ID if you select the **Deny Access** check box because you are denying access for all time periods and functions.

Warning! When this page is saved, the selected access for the enrollment access group becomes effective immediately.

Setting Up Enrollment Security for User IDs

To set up user ID enrollment security, use the Enrollment Security component (OPR_SA_ACCESS).

This section lists prerequisites and discusses how to define enrollment security for user IDs.

Prerequisites

Before you can create enrollment security for user IDs, you must set up enrollment access IDs and enrollment access groups.

Related Links

Setting Up Enrollment Access IDs
Setting Up Enrollment Access Groups

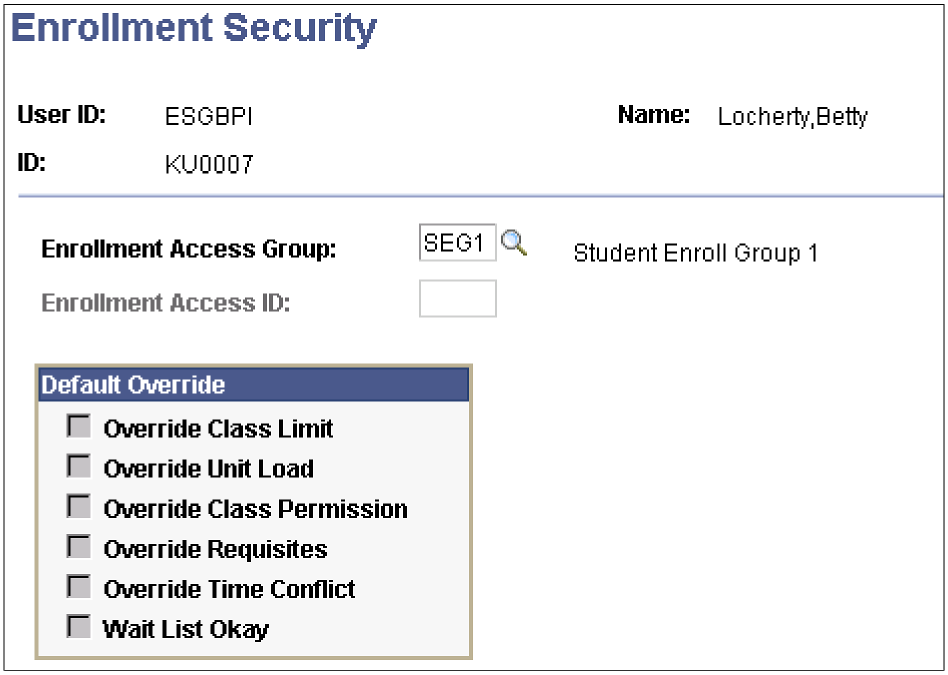
Page Used to Create Enrollment Security for User IDs

Page Name	***Definition Name***	***Navigation***	***Usage***
Enrollment Security	OPR_SA_ACCESS	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Enrollment Security** > **Enrollment Security**	Define enrollment security for user IDs by assigning either an enrollment access group or an enrollment access ID to a specific user ID. Also, assign additional default enrollment overrides.

Defining Enrollment Security for User IDs

Access the Enrollment Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Enrollment Security** > **Enrollment Security**).

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



You can grant a user ID enrollment access by enrollment access group *or* by enrollment access ID, but not both.

Field or Control	***Description***
Enrollment Access Group	Enter an enrollment access group to grant the user ID access to enrollment for specific groups of students. The **Default Override** group box is not available if you enter an enrollment access group. **Note:** When a user's enrollment security is controlled by an enrollment access group, override security is enforced when an enrollment request is processed by the enrollment engine.
Enrollment Access ID	Enter an enrollment access ID to grant the user ID access to enrollment functions during specific time periods within the session. When you enter an enrollment access ID and exit the field, the system checks against the ENRMT_OVRD_TBL and makes available the overrides allowed for the selected enrollment access ID. **Note:** When a user's enrollment security is controlled by enrollment access ID, only authorized overrides are available for use on the Enrollment Request page and the Quick Enroll page.

Default Override

If you are granting the user ID access by enrollment access ID, select the override options that you want to set as default overrides for the user ID. You can select only those default overrides that are allowed for the enrollment access ID. The override defaults are available on enrollment pages.

Related Links

Setting Up Enrollment Access IDs
Defining Enrollment Overrides

Setting Up Enrollment Security for Self-Service Enrollment

To set up self-service enrollment security, use the Self-Serv Enrollment Perm List component (SA_SS_ENRL_PERM) and the Enrollment Security component (OPRCLASS_SA_ACCESS).

This section provides an overview of self-service enrollment security, lists prerequisites, and discusses how to:

- Define self-service enrollment permission lists.
- Assign enrollment access to permission lists.

Understanding Self-Service Enrollment Security

When a student selects a term for enrollment, the system displays the View My Schedule page. At this point, PeopleCode enables the system to evaluate the roles attached to the student's user ID. The self-service enrollment permission list defined on the Self Service Enrollment Permission List Definition page must be attached to the student's roles. The search is conducted using the institution and term combination that the student selects on the term listing page.

For example, suppose that a student selects the Fall 2005 term at PSUNV. The system searches all of the roles attached to the user ID and determines whether the permission list named SASTDNT exists for PSUNV. If it does, the student is allowed to continue with the enrollment process. If the permission list is not found, the Add, Swap, and Update links are hidden and the system displays this message: "You are not authorized for self service enrollment at this time."

If a student passes the verification step, subsequent enrollment transactions are subject to enrollment engine security checks. When an enrollment request is submitted, the enrollment engine uses the enrollment access ID attached to the self-service permission list to evaluate time period security as usual.

To set up security for self-service enrollment:

1. Create a self-service permission list for student self-service enrollment on the Permission Lists page.

   Select **PeopleTools** > **Maintain Security** > **Use** > **Permission Lists** to access the Permission Lists page.

2. Create a role for student self-service in the Roles component.

   (Select **PeopleTools** > **Maintain Security** > **Use** > **Roles** to access the Roles component. Attach the permission list to this role.

3. Attach an enrollment access ID to the permission list using the Permission List - Enrollment Security page.

4. Specify the self-service enrollment permission list for the institution using the Self Service Enrollment Permission List page.

Prerequisites

Before you can set up self-service enrollment security, you must:

- Create the role for student self-service on the Roles page.
- Set up a self-service enrollment permission list on the Permission List page.
- Set up enrollment access IDs on the User ID - Enrollment Security page.

Pages Used to Set Up Enrollment Security for Self-Service Enrollment

Page Name	***Definition Name***	***Navigation***	***Usage***
Self Service Enrollment Permission List Definition	SA_SS_ENRL_PERM	**Set Up SACR** > **Security** > **Secure Student Administration** > **Permission List** > **Self-Serv Enrollment Perm List** > **Self Service Enrollment Permission List Definition**	Define self-service enrollment permission lists.
Permission List – Enrollment Security	OPRCLASS_DEF_SA	**Set Up SACR** > **Security** > **Secure Student Administration** > **Permission List** > **Enrollment Security** > **Enrollment Security**	Assign an enrollment access ID to a permission list. Permission lists are then assigned to students to give them access to self-service enrollment functions.

Defining Self-Service Enrollment Permission Lists

Access the Self Service Enrollment Permission List Definition page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Permission List** > **Self-Serv Enrollment Perm List** > **Self Service Enrollment Permission List Definition**).

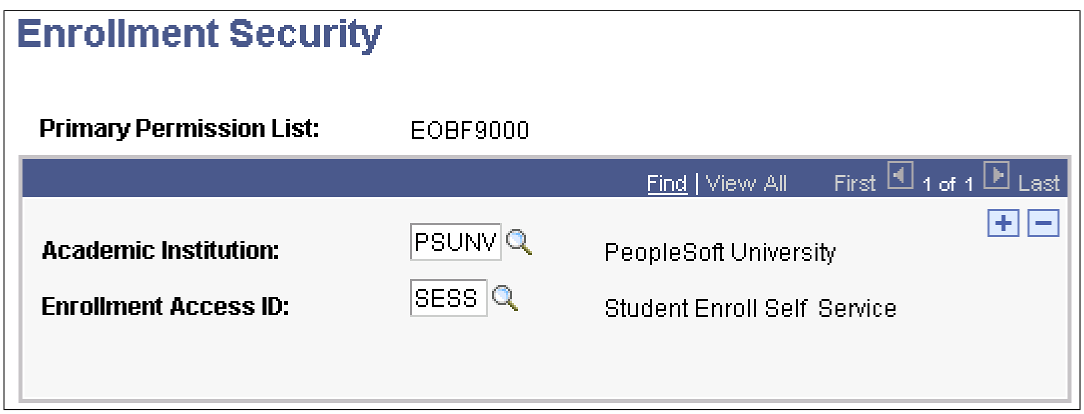
This example illustrates the fields and controls on the Self Service Enrollment Permission List Definition page. You can find definitions for the fields and controls later on this page.

Field or Control	*Description*
Permission List	Enter the self-service permission list that you created. The academic institution is associated with the permission list.
Delete	Click to delete the academic institution and permission list combination defined on the page. In the preceding example, the PSUNV/SASTDNT row would be deleted from the table. A warning message appears when you click the **Delete** button.

Assigning Enrollment Access to Permission Lists

Access the Permission List - Enrollment Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Permission List** > **Enrollment Security** > **Enrollment Security**).

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



Field or Control	*Description*
Academic Institution	Enter an academic institution that a student can access for self-service enrollment using this permission list.
Enrollment Access ID	Enter an enrollment access ID to allow students using this permission list to access the enrollment functions during the time periods specified in the enrollment access ID.

Setting Security for Program Actions

To set up program action security, use the Program Action Security component (SCRTY_PROG_ACTION).

This section lists a prerequisite and discusses how to define program action security.

Prerequisite

Before you can set up program action security, set up the program actions on the Program Action Table page.

Related Links

Setting Security for Program Actions
"Setting Up Admissions Program Actions and Program Action Reasons" (Recruiting and Admissions)

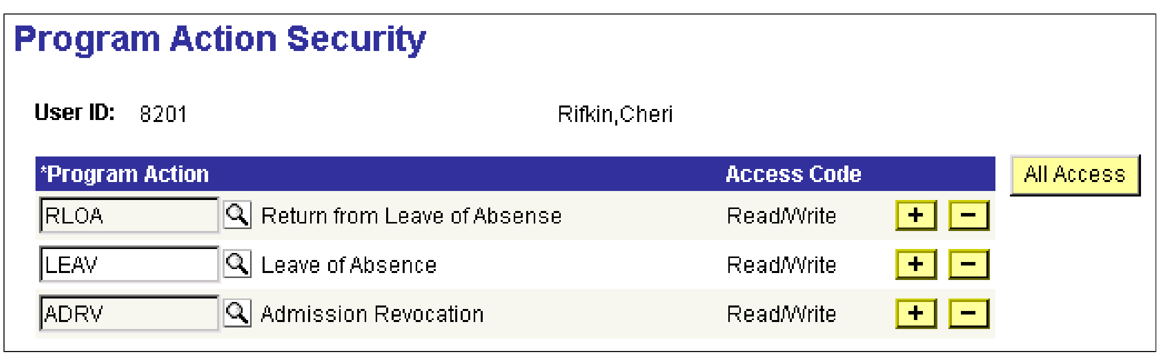
Page Used to Set Security for Program Actions

Page Name	***Definition Name***	***Navigation***	***Usage***
Program Action Security	SCRTY_PROG_ACTION	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Program Action Security** > **Program Action Security**	Define program action security by assigning a user ID to specific program actions. If you do not give the user ID access to program actions on this page, the user ID cannot perform any program actions.

Defining Program Action Security

Access the Program Action Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Program Action Security** > **Program Action Security**).

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



Field or Control	Description
Program Action	Enter a program action that the user ID can access. The access code is set to *Read/Write*.
All Access	Click to assign access to all program actions for the user ID.

Setting Security for Transcript Types

To set up transcript type security, use the Transcript Type Security component (SCRTY_TSCRPT_TYPE).

This section lists a prerequisite and discusses how to define transcript type security.

Prerequisite

Before you can define transcript type security, set up transcript types in the Define Transcript Type component.

Note: Transcript type security does not affect access to transcript types in PeopleSoft Learner Services or PeopleSoft Learning Management self-service applications.

Related Links

"Defining Transcript Types" (Student Records)

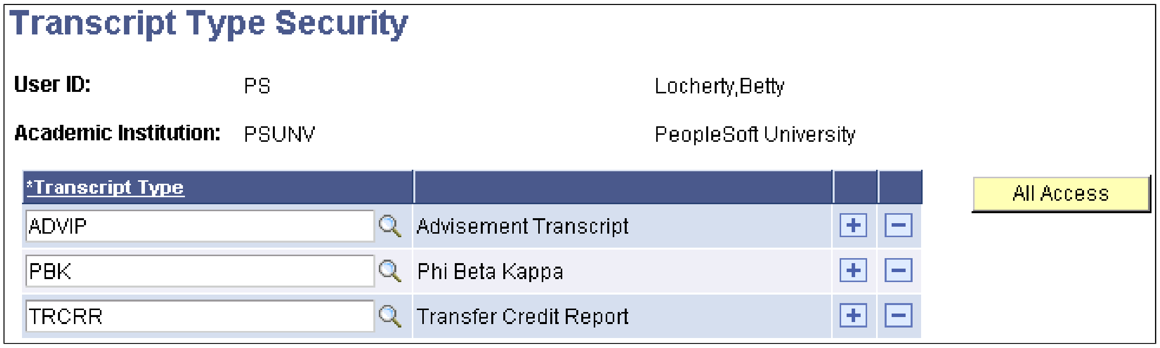
Page Used to Set Security for Transcript Types

Page Name	Definition Name	Navigation	Usage
Transcript Type Security	SCRTY_TSCRPT_TYPE	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Transcript Type Security** > **Transcript Type Security**	Set transcript type security for a user ID and a particular institution.

Defining Transcript Type Security

Access the Transcript Type Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Transcript Type Security** > **Transcript Type Security**).

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



When a user attempts to process a transcript using the Request Transcript Report (SSR_TSCRPT_RQST) or Process Transcripts (SSR_RUNCTL_TSRPT) components, the user can select only those transcript types for which the user has security access.

Field or Control	***Description***
Transcript Type	Enter a transcript type for which the combination of user ID and academic institution has processing access.

Note: You should not define a transcript type of *ALL* because the system uses this value to grant users access to all transcript types.

Setting Security for Graduation Review

To set up graduation review security, use the Graduation Status Security (SSR_SCRTY_GRADSTAT) component.

This section discusses how to set graduation status security.

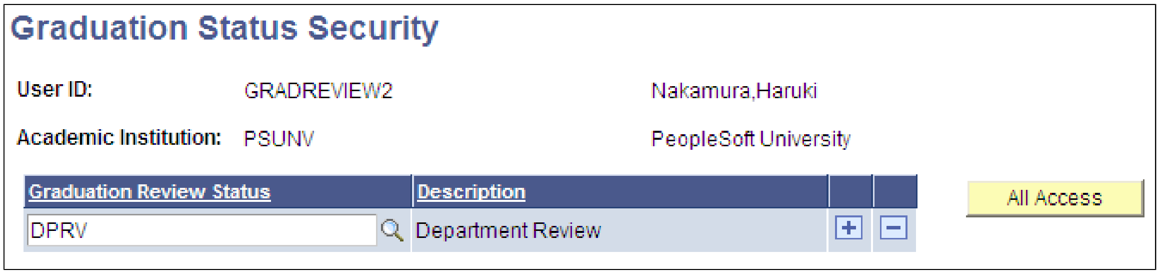
Page Used to Set Security for Graduation Review

Page Name	***Definition Name***	***Navigation***	***Usage***
Graduation Status Security	SSR_SCRTY_GRADSTAT	**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Graduation Status Security**	Identify, by institution, the **Graduation Status** the user has access to use during graduation tracking.

Setting Graduation Status Security

Access the Graduation Status Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Graduation Status Security**).

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



Field or Control	*Description*
Graduation Review Status	Select the value or values that the UserID can use on the Graduation Tracking page.
All Access	Click this button to change the **Graduation Review Status** to *ALL* and grant the user access to every status available.

Setting Security for Milestones

To set up Milestone security, use the Milestone Security (SSR_SCRTY_GRADSTAT) component.

This section discusses how to set Milestone security.

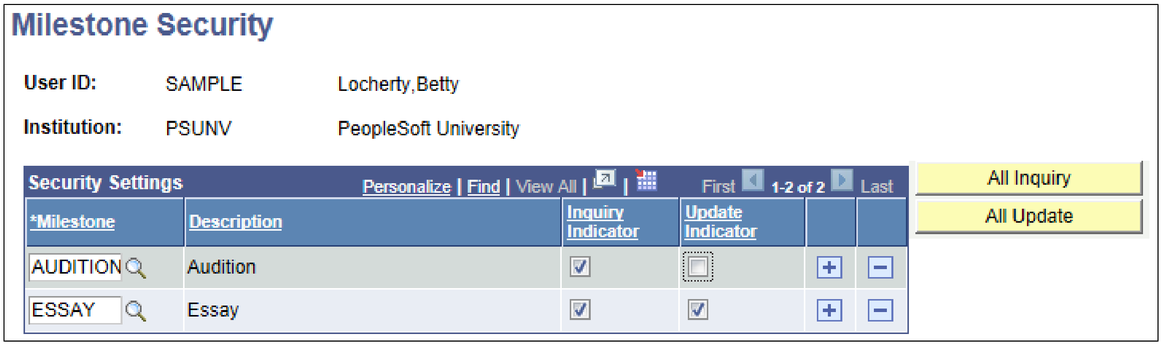
Page Used to Set Security for Milestones

Page Name	*Definition Name*	*Navigation*	*Usage*
Milestone Security	SCRTY_TBL_MLSTN	**Setup SACR** > **Security** > **Secure Student Administration** > **User ID** > **Milestone Security**	Identify, by user and institution, access to Milestones.

Setting Milestone Security

Access the Milestones Security page (**Setup SACR** > **Security** > **Secure Student Administration** > **User ID** > **Milestones Security**).

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



Field or Control	*Description*
Inquiry Indicator	Select this check box to allow the user to see the Milestone.
Update Indicator	Select this check box to allow the user to see and update the Milestone.
All Inquiry	Click this button to allow the user to see all Milestones.
All Update	Click this button to allow the user to see and update all Milestones.

Chapter 20

Securing Student Financials

Understanding Student Financials Security

In Student Financials, you can set security for setIDs, business units, cashier offices, item types, institution sets, origin IDs, and credit cards. For each of these items, you can select to have no security, user ID security, or permission list security. You can use any of the three types of security, and you do not need to use the same type of security throughout the application. For example, you could select no security for origin IDs, user ID security for business units, and permission list security for item types.

You use the Security Options page to enter data such as the type of security for setIDs, business units and item types. The type of security that you select for each item on the Security Options page determines which of the other pages in this section you must complete. You can secure each item by user ID or permission list.

If you select user ID security for an item on the Security Options page, complete the appropriate page by selecting **Design Student Administration** > **Secure Student Financials** > **User ID.**

If you select permission list security for an item on the Security Options page, complete the appropriate page by selecting **Design Student Administration** > **Secure Student Financials** > **Perm List.**

If you select no security for an item on the Security Options page, do not complete any other page for that item. All permission lists and user IDs can access all items when you select no security.

When you set security, you give either a user ID or a permission list access to the items that you list on the page. If you do not list the item on the page, the user ID or permission list does not have access to the item.

In the following sections, you can set security for each item using a user ID page or a permission list page. Complete only one of these pages, depending on the type of security that you select on the Security Options page for the item.

Note: Student Financials security works in conjunction with any other security settings that you configure in Campus Solutions.

See *PeopleTools: Security Administration*

Setting Security Views

To set up security views, use the Security Views component (SECURITY_VIEWS).

Before completing the security setup, you should review the delivered security views. You can also add modified security views to the system.

This section discusses how to review security views.

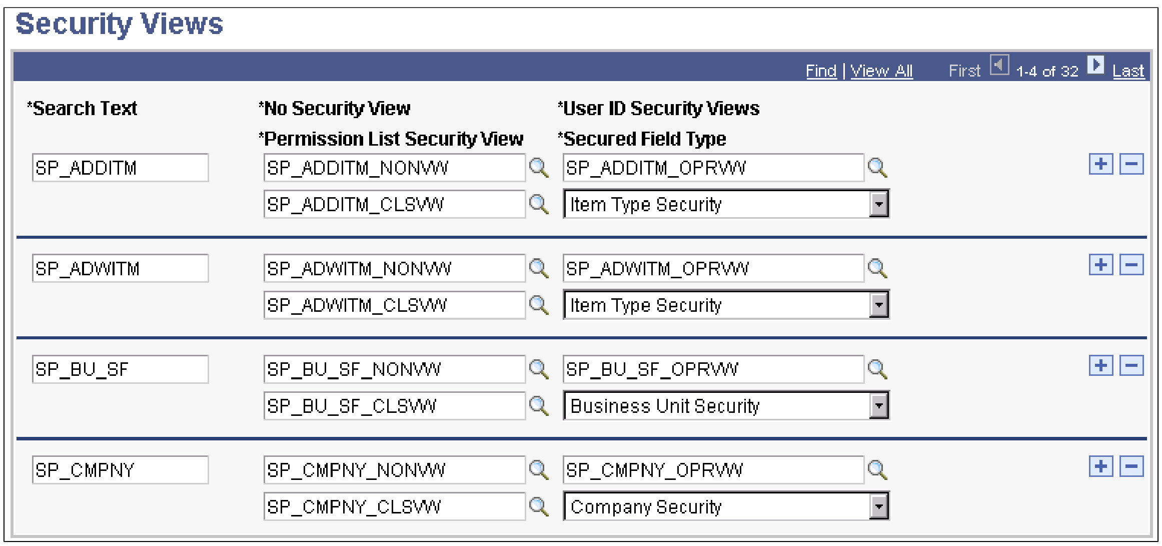
Page Used to Set Security Views

Page Name	*Definition Name*	*Navigation*	*Usage*
Security Views	SECURITY_VIEWS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Setup** > **Security Views** > **Security Views**	Review the security views delivered with Campus Solutions. You can also add modified security views for the system.

Reviewing Security Views

Access the Security Views page (**Set Up SACR** > **Security** > **Secure Student Financials** > **Setup** > **Security Views** > **Security Views**).

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



Field or Control	*Description*
Search Text	Common identifier that relates to the view.
No Security View	The view that runs when no security is set.
Permission List Security View	The view that runs when security is set to permission list.
User ID Security Views	The view that runs when security is set to user ID.
Secured Field Type	When a prompt is on the field, one of the views runs depending on how security is set.

View Extensions

View names have one of three extensions:

- _NONVW indicates that the view has no security.
- _OPRVW indicates the view has user ID security.
- _CLSVW indicates the view has permission list security.

Setting Security Options

To set up security options, use the Security Options component (SECURITY_OPTIONS).

You can select no security, user ID security, or permission list security for the setID, business unit, credit card number, institution set, origin, and item type in Student Financials. After you make selections on the Security Options page, you use other pages to enter user IDs or permission lists to secure the selected items.

This section discusses how to select security options.

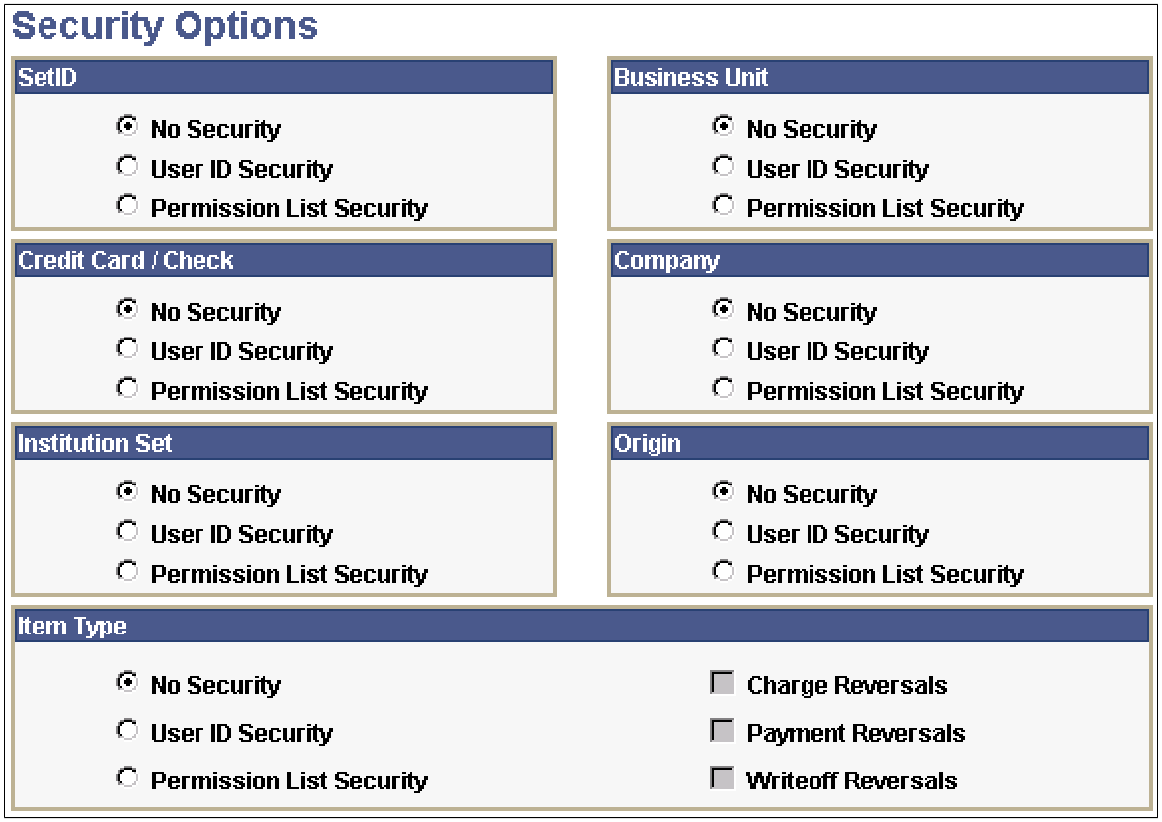
Page Used to Set Security Options

Page Name	***Definition Name***	***Navigation***	***Usage***
Security Options	SCRTY_OPTIONS_SF	**Set Up SACR** > **Security** > **Secure Student Financials** > **Setup** > **Security Options** > **Security Options**	Select the security options that you plan to implement and the key fields that you want to secure in Student Financials. **Note:** This page is not keyed by setID or business unit. The system implements the options that you select here throughout the system.

Selecting Security Options

Access the Security Options page (**Set Up SACR** > **Security** > **Secure Student Financials** > **Setup** > **Security Options** > **Security Options**).

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



SetID, Business Unit, Credit Card/Check, Institution Set, and Origin

For each area, select a security option:

Note: If you select **No Security** for **Credit Card / Check,** all users can view the entire credit card number. If you select **User ID Security** or **Permission List Security,** only users who are granted access can view the whole credit card number.

Field or Control	*Description*
No Security	Select to disable Campus Solutions security. All users authorized to access a page can select any valid setID, business unit, credit card, institution set, origin, or item type. Campus Solutions is delivered with security disabled. When you select this option, the system does not use any of the security setup that is described in these sections. Even if you enter information on the pages in these sections, the security is *not* implemented if you select the **No Security** option here.

Field or Control	*Description*
User ID Security	Select to enable Campus Solutions security. Users are limited to the setID, business unit, credit card, institution set, origin, or item type specified by user ID. This and other related topics also discuss how to set up security for a user ID.
Permission List Security	Select to enable Campus Solutions application security. Users are limited to the setID, business unit, credit card, institution set, origin, or item type specified by a permission list. All users in the permission list have the same security. This and other related topics also discuss how to set up security for permission lists.

Item Type

The following check boxes are available only if you select the **User ID Security** or **Permission List Security** options in the **Item Type** group box.

Note: When you select these check boxes, you're able to perform the corresponding operations on item types that you have access to. When you don't select any of these check boxes, you can reverse any item type.

Field or Control	*Description*
Charge Reversals	Select to restrict the user to reverse only those item types that you define as charge item types.
Payment Reversals	Select to restrict the user to reverse only those item types that you define as payment item types.
Writeoff Reversals	Select to restrict the user to reverse only those item types that you define as write-off item types.

Updating Student Financials Security Settings

To set up Student Financials security, use the Set Security component (RUNCTL_SFSCRTY).

The Security Options page is delivered with no security set for each item on the page. The SF Load Security Views (Student Financials load security views) Application Engine process (SFRSCVW) that you run from this page updates system security with the selections on the Security Options page. You also must run this process if you modify any of the other pages used for Student Financials security—for example, when you modify information on the Permission List - Business Unit page. You do not need to run this process when you modify credit card security options.

This section discusses how to update security for Student Financials.

Page Used to Update Student Financials Security Settings

Page Name	***Definition Name***	***Navigation***	***Usage***
Set Security	RUNCTL_SFSCRTY	**Set Up SACR** > **Security** > **Secure Student Financials** > **Process** > **Set Security** > **Set Security**	Run the SF Load Security Views SQR process (SFRSCVW) to update security changes and generate a security report.

Updating Security for Student Financials

Access the Set Security page (**Set Up SACR** > **Security** > **Secure Student Financials** > **Process** > **Set Security** > **Set Security**).

Field or Control	***Description***
Business Unit	Enter the business unit for which you want to update security. If you have multiple business units for which you must update security, run the process separately for each business unit.
Generate Report	Select to update security *and* generate a report. If you do not select this check box, the system only updates security.
Run	Click to run the SF Load Security Views process (SFRSCVW). When you run the process, the system also generates a report called the SF Load Security Views report.

Setting Security for SetIDs

To set up setID security, use two SetID components (SETID_CLASS_SECUR and SETID_OPERATOR_SEC).

Depending on the security option that you selected for setIDs on the Security Options page, you can grant access to a setID (tableset) using permission lists *or* user IDs. If you select no security for setIDs on the Security Options page, do not complete the pages listed in this section, because all user IDs and permission lists have access to all setIDs.

This section lists the pages used to set security for setIDs.

Pages Used to Set Security for SetIDs

Page Name	***Definition Name***	***Navigation***	***Usage***
Permission List - Set ID	SEC_SETID_CLS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **SetID** > **SetID**	Grant a selected permission list access to specific setIDs.
User ID - SetID	SEC_SETID_OPR	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **SetID** > **SetID**	Grant a selected user ID access to specific setIDs.

Setting Security for Business Units and Cashier Offices

To set up business unit and cashier office security, use two Business Unit components (SEC_UNITSF_OPR and UNIT_CLASS_SECURIT).

The pages discussed in this section enable you to grant security access to business units and to cashier offices within business units. If the institution does not use the cashiering feature, you do not need to set up cashier security, but you can set up business unit security.

Depending on the security option that you select for business units on the Security Options page, you should grant access to a business unit and cashier office using permission lists *or* user IDs. If you select no security for business units on the Security Options page, you do not need to complete the pages discussed in this section, because all user IDs and permission lists have access to all business units.

This section lists prerequisites and discusses how to:

- Grant a permission list access to business units and cashier offices.
- Grant a user ID access to business units and cashier offices.

Prerequisites

Before you set security for business units and cashier offices, you must:

- Set up business units.
- Set up cashier offices.

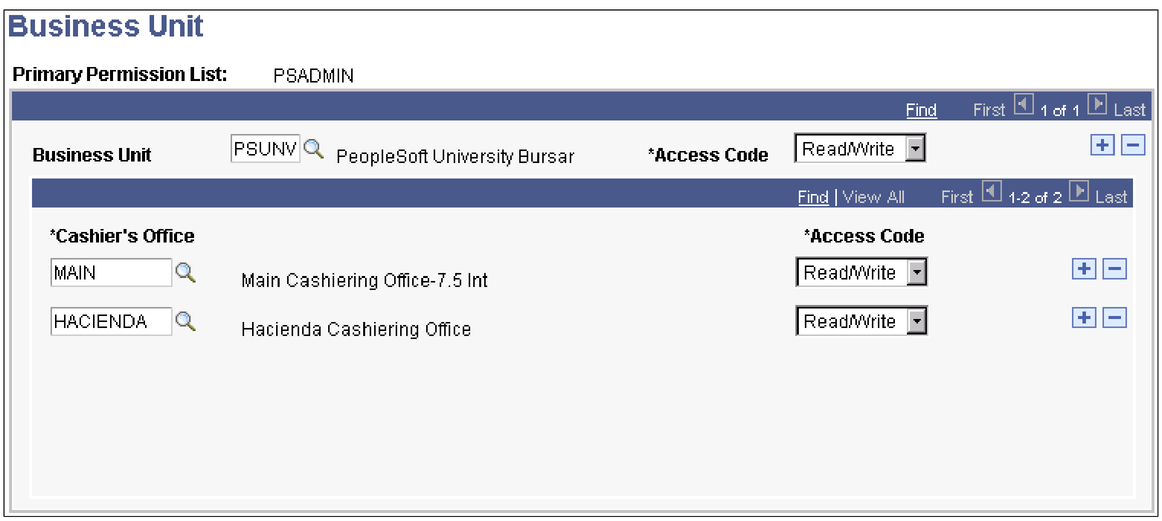
Pages Used to Set Security for Business Units and Cashier Offices

Page Name	***Definition Name***	***Navigation***	***Usage***
Permission List - Business Unit	SEC_UNITSF_CLS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Business Unit** > **Business Unit**	Grant a permission list access to business units. Within a business unit, you can also grant permission to specific cashier offices.
User ID - Business Unit	SEC_UNITSF_OPR	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Business Unit** > **Business Unit**	Grant a user ID access to business units. Within a business unit, you can also grant permission to specific cashier offices.

Granting Permission List Access to Business Units and Cashier Offices

Access the Permission List - Business Unit page (**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Business Unit** > **Business Unit**).

This example illustrates the fields and controls on the Permission List - Business Unit page. You can find definitions for the fields and controls later on this page.



Enter the business unit that you want this permission list to access.

To grant the permission list access to a cashier office, select the cashier office (within the business unit) that you want this permission list to access.

If you do not want to grant access to a business unit or cashier office, do not include the business unit or cashier office on this page.

Granting a User ID Access to Business Units and Cashier Offices

Access the User ID - Business Unit page (**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Business Unit** > **Business Unit**).

Enter the business unit that you want this user ID to access.

To grant the user ID access to a cashier office, select the cashier office (within the business unit) that you want this permission list to access.

If you do not want to grant access to a business unit or cashier office, do not include the business unit or cashier office on this page.

Setting Security for Item Types

To set up item type security, use these components: Item Type (SEC_ITEM_CLS and SEC_ITEM_OPR), Item Type Security (ITEM_TYPE_VW_CLS), and View Item Type Security (ITEM_TYPE_VW).

Depending on the security option that you select for item types on the Security Options page, you grant access to item types using permission lists *or* user IDs. If you select no security for item types on the Security Options page, you do not need to complete the pages discussed in this section, because all user IDs and permission lists have access to all item types.

This section lists prerequisites and discusses how to:

- Set item type security by permission list.
- View item type security by permission list.
- Set item type security by user ID.
- View item type security by user ID.

Prerequisites

Before you can set security for item types, you must:

- Grant permission lists access to business units on the Permission List - Business Unit page, if you are securing item types by permission list.
- Grant user IDs access to business units on the User ID - Business Unit page, if you are securing item types by user ID.
- Set up the item type tree in Student Financials.

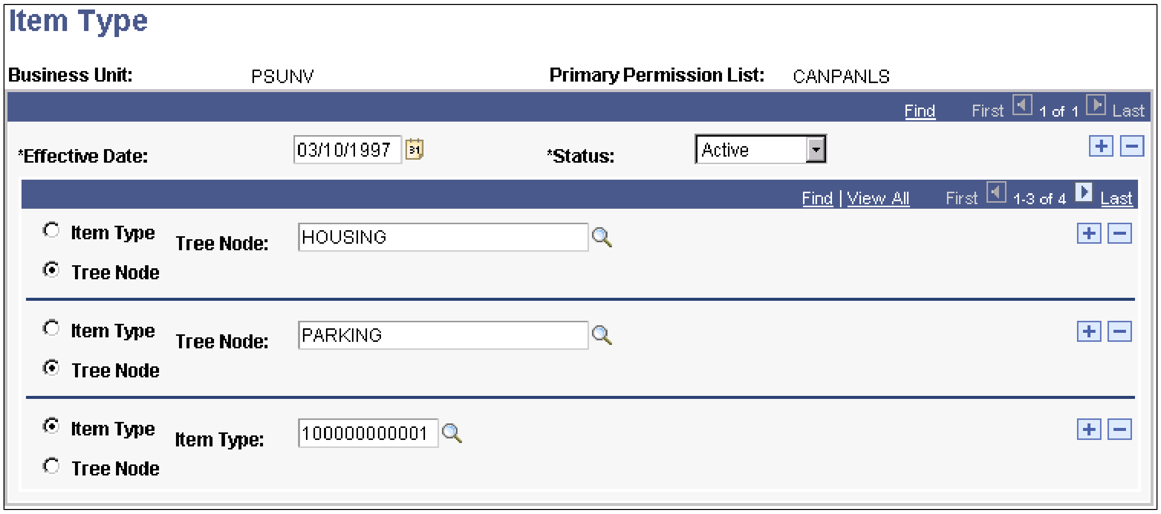
Pages Used to Set Security for Item Types

Page Name	***Definition Name***	***Navigation***	***Usage***
Permission List - Item Type	SEC_ITEM_CLS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Item Type** > **Item Type**	Set item type security for a permission list within a business unit.
Permission List - View Item Type Security	SCRTY_ITEM_TYP_CLS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Item Type Security** > **View Item Type Security**	View item type security by permission list. To view data on this page, you must set up item type security on the Permission Lists - Item Type page and have item type security set to permission list security on the Security Options page.
User ID - Item Type	SEC_ITEM_OPR	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Item Type** > **Item Type**	Set item type security for a user ID within a business unit.
User ID - View Item Type Security	SCRTY_ITEM_TYPE	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **View Item Type Security** > **View Item Type Security**	View item type security by user ID. To view data on this page, you must set up item type security on the User ID - Item Type page and have item type security set to user ID security on the Security Options page.

Setting Item Type Security by Permission List

Access the Permission List - Item Type page (**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Item Type** > **Item Type**).

This example illustrates the fields and controls on the Permission List - Item Type page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Item Type	Select to grant access to a specific item type. After you select this option, you can select an item type from the available options.
Tree Node	Enter to grant access to all item types within a specific node on the item type tree. If you enter a tree node, users have access to all items types defined within that node. After you select this option, you can enter a tree node from the available options.

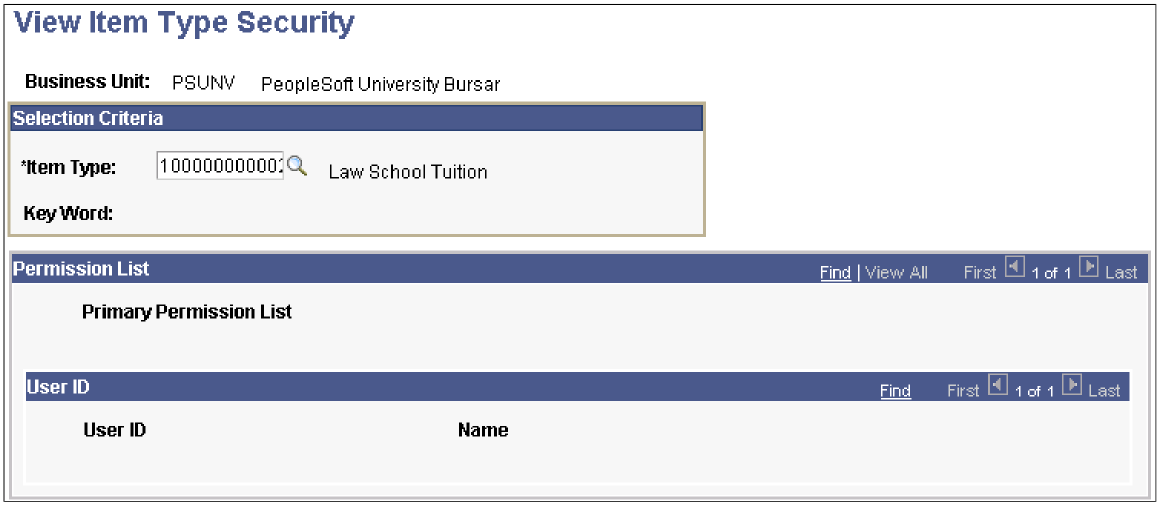
You can enter any combination of tree nodes and item types for the permission list to access. If you select a tree node, you do not need to separately list item types that fall under that tree node.

Note: If you enter the tree node *ALL,* which generally includes the whole tree, select **No Security** for item types on the Security Options page. Granting access to the whole item type tree provides virtually no security at all.

Viewing Item Type Security by Permission List

Access the Permission List - View Item Type Security page (**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Item Type Security** > **View Item Type Security**).

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



Field or Control	***Description***
Item Type	Enter the item type for which you want to review permission list access. After you enter an item type, information appears in the Permission List and User ID group boxes.
Key Word	Displays the keyword if one is associated with the item type.
Permission List	Displays the name of the permission list that has access to the selected item type.

Setting Item Type Security by User ID

Access the User ID - Item Type page (**(Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Item Type** > **Item Type**).

You can set access either by defining specific item types or by defining a node on the item type tree. If you select a tree node, the user ID can access all item types on that node of the tree.

Related Links

Setting Item Type Security by Permission List

Viewing Item Type Security by User ID

Access the User ID - View Item Type Security page (**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **View Item Type Security** > **View Item Type Security**).

Related Links

Viewing Item Type Security by Permission List

Setting Security for Institution Sets

To set up institution set security, use two Institution Set components (SEC_ISET_CLS and SEC_ISET_OPR).

Depending on the security option that you select for institution sets on the Security Options page, grant access to an institution set using permission lists *or* user IDs. If you select no security for institution sets on the Security Options page, you do not need to complete the pages listed in this section, because all user IDs and permission lists have access to all institution sets.

This section lists a prerequisite and lists the pages used to set security for institution sets.

Prerequisite

You must set up institution sets before you set security for them.

Pages Used to Set Security for Institution Sets

Page Name	***Definition Name***	***Navigation***	***Usage***
Permission List - Institution Set	SEC_ISET_CLS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Institution Set**	Grant permission lists access to specific institution sets.
User ID - Institution Set	SEC_ISET_OPR	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Institution Set** > **Institution Set**	Grant user IDs access to specific institution sets.

Overriding the Self-Service Institution Set

To set up self-service institution set overrides, use the Student Institution Set component (ISET_OPR).

The User Profiles Management feature assigns institution sets to user IDs. You use the Self Service Institution Set Override page to change the institution set assigned by the User Profiles Management feature. By overriding the institution set on this page, instead of on the User Defaults 2 page, you can view a history of the changes.

This section lists prerequisites and discusses how to override the value for an institution set.

Prerequisites

You must first set up institution sets and then assign a user ID to an institution set. A user ID must be assigned an institution set by the User Profiles Management Application Engine process

(USERPROFILE) to have an institution set appear in the Calculated Value field on the Self Service Institution Set Override page.

Related Links

Understanding User Profiles Security

Page Used to Override the Self-Service Institution Set

Page Name	***Definition Name***	***Navigation***	***Usage***
Self Service Institution Set Override	ISET_OPR	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Student Institution Set** > **Self Service Institution Set Override**	Override the value for an institution set that was assigned to the user ID by the User Profiles Management feature.

Overriding the Value for an Institution Set

Access the Self Service Institution Set Override page (**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Student Institution Set** > **Self Service Institution Set Override**).

Field or Control	***Description***
Institution Set	Enter an institution set to make this value the default for this user ID in the user profile.
Calculated Value	Displays the institution set value assigned to the user ID by the User Profiles Management feature. If you do not use the User Profiles Management feature, no value appears in this field. The calculated value is the same as the **Institution Set** field on the User Defaults 2 page.

Related Links

Entering User Defaults

Setting Security for Origin IDs

To set up origin ID security, use two Origin ID components (SEC_ORIGIN_CLS and SEC_ORIGIN_OPR).

Depending on the security option that you select for origin on the Security Options page, grant access to an origin ID using permission lists *or* user IDs. If you select no security for origin IDs on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all origin IDs.

This section discusses how to:

- Grant a permission list access to origin IDs.
- Grant a user ID access to origin IDs.

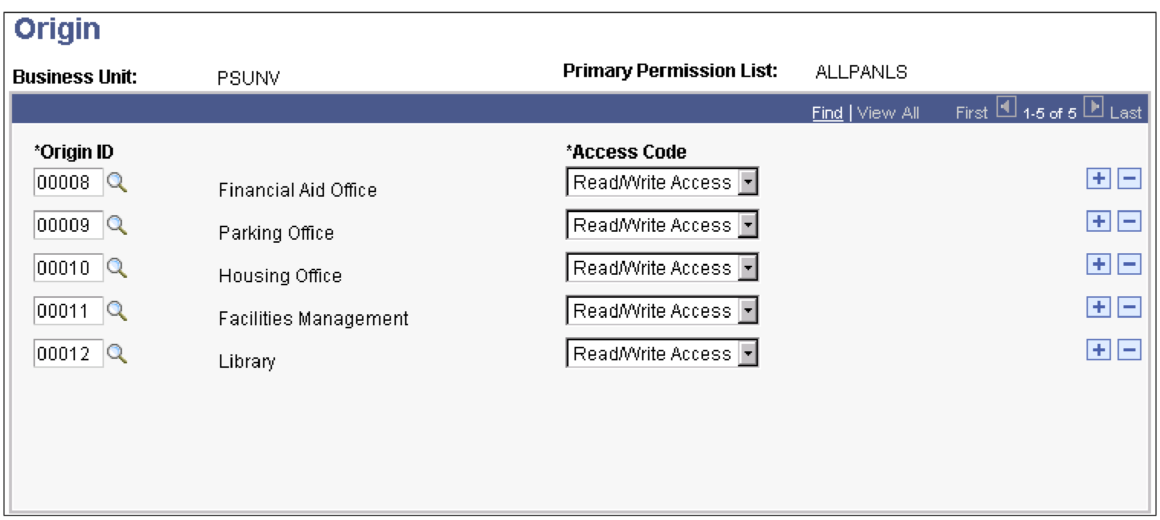
Pages Used to Set Security for Origin IDs

Page Name	***Definition Name***	***Navigation***	***Usage***
Permission List - Origin	SEC_ORIGIN_CLS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Origin ID** > **Origin**	Grant a permission list access to origin IDs. You must first grant permission lists access to business units on the Permission List - Business Unit page.
User ID - Origin	SEC_ORIGIN_OPR	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Origin IDs** > **Origin**	Grant a user ID access to origin IDs. You must first grant user IDs access to business units on the User ID - Business Unit page.

Granting a Permission List Access to Origin IDs

Access the Permission List - Origin page (**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Origin ID** > **Origin**).

This example illustrates the fields and controls on the Permission List - Origin page. You can find definitions for the fields and controls later on this page.



Enter the origin ID that you want the permission list to access. If you do not want to grant access to an origin ID, do not include the origin ID on this page.

Granting a User ID Access to Origin IDs

Access the User ID - Origin page (**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Origin IDs** > **Origin**).

Related Links

Granting a Permission List Access to Origin IDs

Setting Security for Credit Cards

To set up credit card security, use two Credit Card and Bank Account components (SEC_CC_CLS and SEC_CC_OPR).

Depending on the security option that you select for credit cards on the Security Options page, grant access for viewing credit card numbers using permission lists *or* user IDs. If you select no security for credit cards on the Security Options page, you do not need to complete the pages listed in this section.

Warning! If you select no security for credit cards on the Security Options page, all users can view the entire credit card number.
When you assign credit card security on the two pages listed in this section, you are granting the user ID or permission list access to view the entire credit card number. This security should be granted to only a few people in the institution. User IDs and permission lists to which you do not grant credit card security access can view only the last four digits of the credit card number.

Pages Used to Set Security for Credit Cards

Page Name	***Definition Name***	***Navigation***	***Usage***
Permission List - Credit Card and Bank Account	SEC_CC_CLS	**Set Up SACR** > **Security** > **Secure Student Financials** > **Permission List** > **Credit Card and Bank Account** > **Credit Card and Bank Account**	Grant a permission list the ability to view the entire credit card number. You must first set up permission lists.
User ID - Credit Card and Bank Account	SEC_CC_OPR	**Set Up SACR** > **Security** > **Secure Student Financials** > **User ID** > **Credit Card and Bank Account**	Grant a user ID the ability to view the entire credit card number. You must first set up user IDs.

Chapter 21

Securing Contributor Relations

Setting Up Institution Table Security

To set up institution table security, use the Academic Institution Security component (SCRTY_TABL_INST).

This section discusses how to set institution table security.

Page Used to Set Up Institution Table Security

Page Name	*Definition Name*	*Navigation*	*Usage*
Academic Institution Security	SCRTY_TABL_INST	• **Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Institution Security** > **Academic Institution Security** • **Set Up SACR** > **Security** > **Secure Contributor Relations** > **Secure Institution Table** > **Academic Institution Security**	Set up security access for users at academic institutions.

Setting Institution Table Security

Access the Academic Institution Security page (**Set Up SACR** > **Security** > **Secure Student Administration** > **User ID** > **Academic Institution Security** > **Academic Institution Security**).

Field or Control	*Description*
Academic Institution	Provide the user with access to the system for that institution. When entered, the user automatically has read/write access to all the data related to that institution. If a user is given access to only one institution, that institution defaults on all pages requiring an institution.

Defining and Securing PeopleSoft Contributor Relations Business Units and SetIDs

To define and security Contributor Relations business units and setIDs, use these components: Business Unit CR (AV_BUS_UNIT), Functional Group Security (AV_FUNC_GRP_TBL), Functional Group Components (AV_CMPNT_FUNC), and Secure Business Unit (AV_SCRTY_BU_TBL).

This section provides overviews of Contributor Relations business units and setIDs, business units and the Commitment Entry process, and business units and the Membership process and discusses how to:

- Create Contributor Relations business units.
- Implement functional group security.
- Define functional group components.
- Choose component search record settings.
- Secure Contributor Relations business units.
- Examine a Query Security example.

Understanding Contributor Relations Business Units and SetIDs

Establishing business unit structure for Contributor Relations enables you to efficiently secure and segment data. This organizational structure may differ from the structure set up to support other PeopleSoft applications at the institution. You can define business units that reflect the functional needs of the institution, and setIDs for sharing tables with setup values. This structure enables you to define data segmentation based on business rules. In addition, query and reporting capabilities become more powerful for the institution and the individual user.

In Contributor Relations, both the membership and commitment entry portions of the system are secured at the business unit level.

In addition, the system is delivered with a set of defined functional groups that represent the business processes impacted by business units. For each functional group, determine whether or not to implement user level security. If user security is selected for any functional group, establish user access to appropriate business units.

Warning! Before creating and securing business units, think carefully about how to set up the institutional structure and about what information particular users need to access. After you define a structure, you cannot delete a business unit to protect historical data related to a business unit.

Understanding Business Units and the Commitment Entry Process

The following process describes how business units work within the commitment entry process. This process assumes that you have already set up an operational structure, including business units and setIDs, and secured them.

To work with business units throughout the commitment entry process:

1. Define setup values for commitment entry.

   These include defining values for designations, initiatives, and appeals.

2. Set up user defaults for institution, business unit, and setID using the Operator Defaults page.

   These default Values are: used throughout the system. In addition, select defaults for designation business units.

3. Open a new gift or pledge session.

   Each session is associated with a business unit. Within the session, commitments can be designated to one or more business units. After a session is established, default designation business units, designation, initiative, and appeal can be defined using the Session Defaults page. These defaults override any user defaults that have been defined. Session defaults can also be changed at any point during the transaction entry process.

Related Links

Entering User Defaults

"Selecting Session Defaults" (Contributor Relations)

Understanding Business Units and the Membership Process

The following process describes how business units work within the membership process. This process assumes you have already set up an operational structure, including business units and setIDs, and secured it. The process also assumes you have defined user defaults and setup values for the commitment entry process.

To work with business units throughout the membership process:

1. Define setup values for membership including appeals, membership types, and membership categories.

   See "Setting Up Membership Initiatives" (Contributor Relations).

2. Create a member organization within a business unit.

3. Define member dues for the member organization.

   When defining dues, specify default designations to which dues payments are allocated. Select a designation business unit, designation, initiative code, and amount for each designation to which a portion of the dues payment is allocated.

   See "Creating a Member Organization" (Contributor Relations).

4. Create a membership initiative. Select a business unit to associate with the membership initiative.

   This "owner" business unit controls the available prompt values when selecting a responsible department, selecting an associated member organization, defining annual goals, selecting a public relations appeal, and selecting an appeal for a budget expense.

   See "Defining an Initiative" (Contributor Relations).

5. Receive a membership payment/open a membership session.

Select a business unit for the session. When you assign membership dues designations, the values defined on the Member Dues page populate the fields on the Designations page. You can edit the Initiative and Amount fields.

See “Entering Member Dues” (Contributor Relations).

Contributor Relations Business Unit Security and PeopleSoft Query

Business unit security is applied to functional groups within Contributor Relations through a user-defined setting based on components not records. Therefore, it has not been applied to PeopleSoft Query. Contributor Relations records are delivered in the system without a Query Security Record attached, but an example of how you could extend business unit security to PeopleSoft Query is provided.

Remember that you can use business units within Contributor Relations in two ways.

The first is the business unit owning the transaction (such as gift, pledge, member payment), and the second is the designation business unit or the business unit to which some portion of a transaction amount is directed. The first is represented by the BUSINESS_UNIT field throughout the system, while the second is represented by the AV_DES_BU field. In most cases, business unit security is applied to the AV_DES_BU field throughout the system when invoked. There are, however, some cases where the business unit security setting is applied to the owning business unit as opposed to the designation business unit. When designing queries and query security records, deciding where to apply the security affects which query security record is used and what data is returned. If securing by owning business unit, the query security record AV_BU_SCRTY_VW is used, and if securing by designation business unit, the query security record AV_BU_SCRTY_DES should be used.

Applying security to both business unit types in a query most likely does not produce the desired result. For example, take an installation that has three business units BU1, BU2, and BU3. A gift is entered by business unit BU1 and some of the gift is directed toward a designation fund in BU3. A user exists who has security access to see the gift information for BU3 only. If query security is applied at the owning business unit level, the user is then prevented from seeing that portion of the gift directed to their business unit. If both owning business unit and designation business unit security are applied in a query at the same time, the owning business unit application prevents the designation business from even being considered. If the query security is applied at the designation business unit level only, the user can only see that portion of the gift that was given to their business unit.

Pages Used to Define and Secure Contributor Relations Business Units and SetIDs

Page Name	***Definition Name***	***Navigation***	***Usage***
Business Unit CR (Contributor Relations)	AV_BUS_UNIT_TBL	**Set Up SACR** > **Product Related** > **Contributor Relations** > **Install Contributor Relations** > **Business Unit CR** > **Business Unit CR**	Define the business units at the institution from a cultivation and fund-raising perspective.

Page Name	*Definition Name*	*Navigation*	*Usage*
Functional Group Security	AV_FUNC_GRP_TBL	**Set Up SACR** > **Security** > **Secure Contributor Relations** > **Functional Group Security** > **Functional Group Security**	Determine whether to implement user-level business unit security for the various functional groups in the system. Functional groups are delivered with the system as translate values and represent the business processes that use business unit functionality in the system. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.
Component Function	AV_CMPNT_FUNC	**Set Up SACR** > **Security** > **Secure Contributor Relations** > **Functional Group Components** > **Component Function**	Identify the components in the system that make up a functional group. The components in a functional group inherit the security settings you define for that group on the Functional Group Security page.
Component Search Records	AV_BU_SCRTY_REC	Click the **Srch Recs** link on the Component Function page.	View or select search views for components based upon the type of security used when accessing them.
CR Business Unit Security (Contributor Relations business unit security)	AV_SCRTY_BU_TBL	**Set Up SACR** > **Security** > **Secure Contributor Relations** > **Secure Business Unit** > **CR Business Unit Security**	Grant a user security access to one or more business units at the institution.

Creating Contributor Relations Business Units

Access the Business Unit CR page (**Set Up SACR** > **Product Related** > **Contributor Relations** > **Install Contributor Relations** > **Business Unit CR** > **Business Unit CR**).

Field or Control	*Description*
Institution	Enter the name of the institution to which the business unit belongs. If you have already saved the business unit, this field is display-only. If a business unit is assigned to a different institution, a new business unit CR should be created.
Base Currency	Enter the base currency to default when entering transactions or working with financially driven Contributor Relations processes within this CR business unit.

Field or Control	***Description***
Rate Type	Enter the exchange rate to use when translating amounts to the base currency for this business unit. Examples of rate type are *Official Rate, Spot Rate,* and *Free Market Rate.* **Note:** Transactions entered in the system are translated from the session currency to the institution's base currency using the rate type on the Institution Defaults page. The business unit base currency setting is used as the default currency code for all membership and gift sessions created for a business unit, but can be overridden.
Tender Type	Enter the default tender type to use when entering transactions for this business unit. Tender types are defined on the Tender Types page. The tender type is used as the default tender type for all membership and gift sessions created for this business unit, but can be overridden.
General Ledger Unit	Enter the business unit at the institution where GL data for this Contributor Relations business unit is stored. Tying data to this general ledger unit enables you to structure Contributor Relations business units differently than other business units at the institution. The business units you define are tied back to the general ledger business units through this field.
Merchant ID	To define the credit card merchant information and credit card default options for each business unit, enter the merchant ID from the CR Merchant table. You must associate each business unit with a merchant ID. See “Defining Connection Parameters for a Third-Party Processor” (Contributor Relations).

Examples

The following scenarios represent two different ways an institution might set up Contributor Relations business units.

PeopleSoft University A is a single campus institution. This institution's business units are organized along individual schools, with some degree of centralization. Its business units include:

- Medical School Business Unit.
- Law School Business Unit.
- PeopleSoft University Business Unit (Centralized Business Unit for all standard schools. For example, School of Arts and Sciences, School of Business, and School of Education).

PeopleSoft University B is a multi-campus institution, and its business units are organized by its various locations. Its business units include:

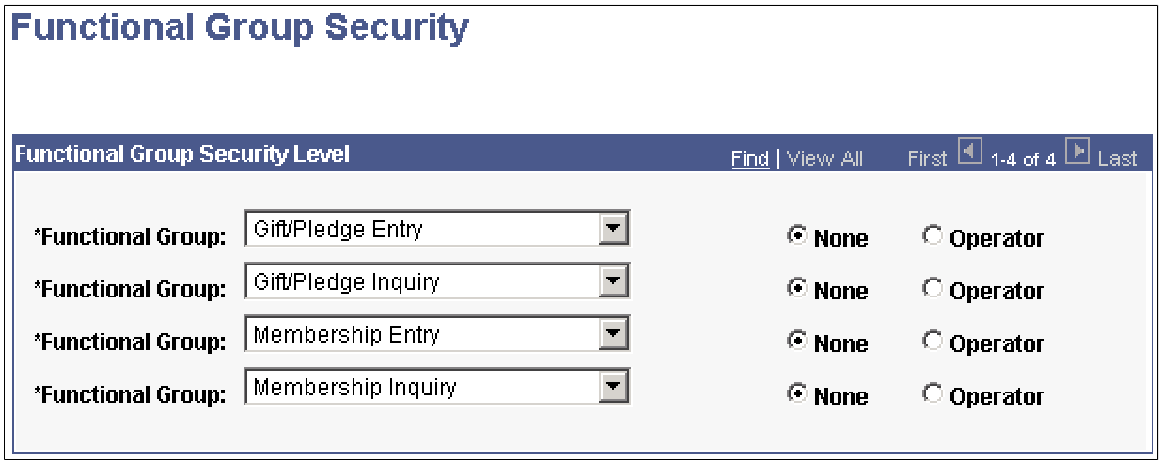
- Main Campus business unit.

- Extension Campus business unit.
- Online Campus business unit.

Implementing Functional Group Security

Access the Functional Group Security page ((**Set Up SACR** > **Security** > **Secure Contributor Relations** > **Functional Group Security** > **Functional Group Security**).

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



Functional Group Security Level

Field or Control	***Description***
Functional Group	Select a functional group to define security for the group. Functional groups are delivered with the system and represent the major business processes in the system that are affected by business unit. The functional groups delivered with the system cannot be removed or amended.
Functional Security	Select *None* to allow the components that make up this functional group to be accessed without user-level business unit security. Select *Operator* to allow access only with business unit security. If you select operator, the access you grant users on the Secure Business Unit page determine what information a user can access within the functional group.

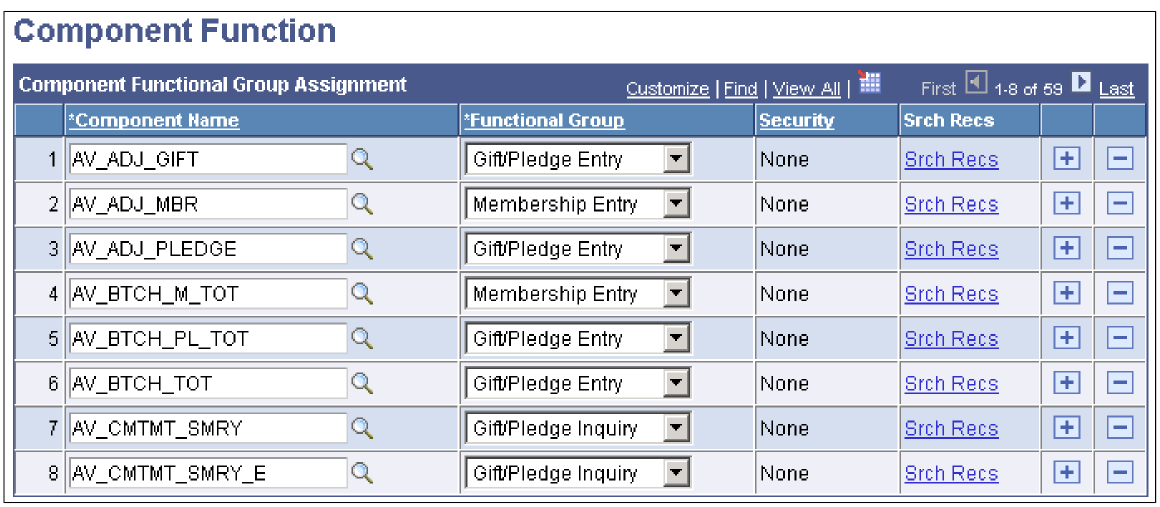
Field or Control	***Description***
Refresh Security	If you make changes to the Functional Security selection for any functional group, this button appears. Run the Refresh Security Process to activate any changes made to security settings. The Refresh Security process is an Application Engine program that synchronizes the component search records and prompt edit table values with the setup of the PSSTATUS table. Updating this value ensures that all Application Servers use the latest version. This is not limited to Contributor Relations; it impacts all PeopleSoft applications sharing the database. When you run this process, check the Process Monitor to verify that it runs successfully and the Message Log for a detailed list of the changes implemented. See the warning in this section prior to running this process.

Warning! After running the Refresh Security process, you must delete all cache files. You must also re-run the PeopleTools process that creates a shared cache file for multiple application servers. This process impacts all applications sharing this database! Contact your IT Support Staff before running this process.

Defining Functional Group Components

Access the Component Function page (**Set Up SACR** > **Security** > **Secure Contributor Relations** > **Functional Group Components** > **Component Function**).

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



Warning! If the security determination process is run on a component that's not assigned to a functional group on this page, the system displays a warning alerting you to the missing setup values, and the component is accessed without business unit security activated. The system is delivered with all of the appropriate components assigned to their respective functional group. Do not make any changes to these settings unless the institution is adding business unit functionality not provided by Contributor Relations.

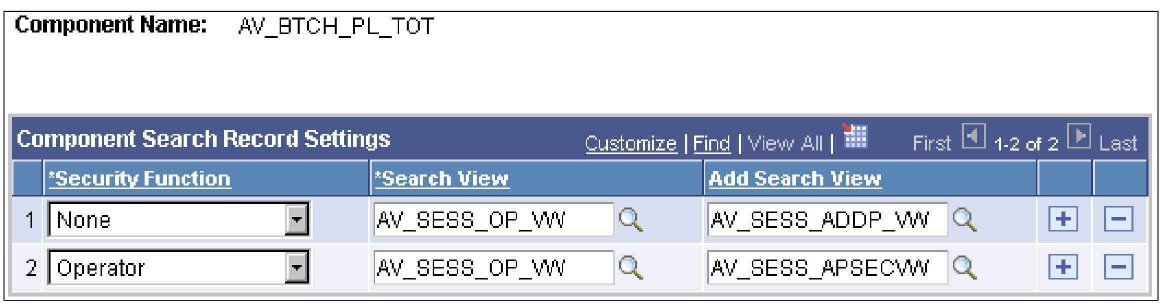
Component Functional Group Assignment

Field or Control	***Description***
Component Name	Enter the component being assigned to a functional group. Components are groupings of pages. You can select from a list of all the valid components in the system.
Functional Group	Select the name of the functional group to which the component belongs. Functional groups are delivered with the system and represent major business processes in the system that use CR business unit security.
Security	If you have defined security for the CR functional group you select, the security option appears. Valid security options include *Operator* or *None.* Select operator to limit access to the component based on CR business units.
Srch Recs (search records)	Click if user-level security for a component is controlled at the search record level. The Component Search Record Settings page displays.

Choosing Component Search Record Settings

Access the Component Search Record Settings page (click the **Srch Recs** link on the Component Function page).

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



Warning! The system is delivered with all search views assigned to the appropriate components. Do not make any changes to these settings unless the institution is adding business unit functionality not provided by Contributor Relations.

Field or Control	***Description***
Security Function	Select *None* or *Operator* to determine the type of security for which you are selecting search views.
Search View	Enter the search view to associate with the component for the security function you selected. The prompt lists all valid search views.
Add Search View	If a component is configured to allow you to add a new record, and the search view to create a new record is different than the Update/Display search record, specify an add search view. For example, you want *NEW* in the session number field instead of blank by default.

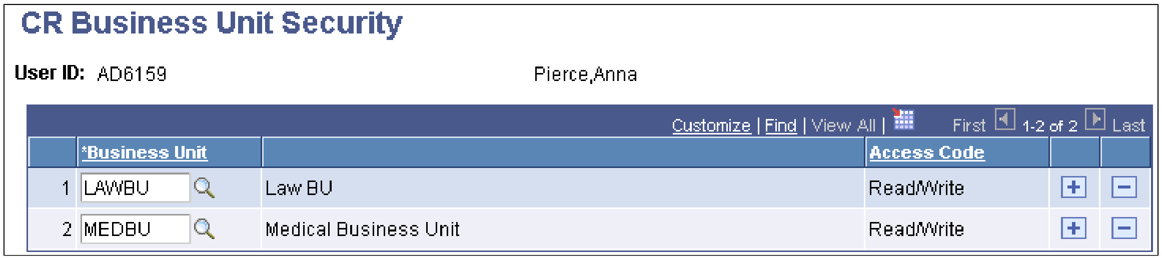
The following components are secured at the search view level:

Functional Group	***Component***	***Description***
Gift/Pledge Entry	AV_BTCH_TOT	Balance Session
	AV_BTCH_PL_TOT	Pledge Balanced Session
	AV_PLDG_SCHD_ADJ	Pledge Schedule Adjustment
	AV_PLDG_SCHED_ADJ_E	Org Pledge Schedule Adjustment
Gift/Pledge Inquiry	AV_PLDG_SCHD_INQ	Pledge Schedule Inquiry
	AV_PLDG_SCHD_INQ_E	Org Pledge Schedule Inquiry
	AV_SPR_GIFT_SMRY	Supervisor Gift Summary
	AV_SPR_PLEDGE_SMRY	Supervisor Pledge Summary
Membership Entry	AV_MEMBERSHIP	Manage Member Organization
	AV_BTCH_M_TOT	Membership Balance Session
Membership Inquiry	AV_SPR_MBRSHP_SMRY	Supervisor Membership Summary

Securing Contributor Relations Business Units

Access the CR Business Unit Security page (**(Set Up SACR** > **Security** > **Secure Contributor Relations** > **Secure Business Unit** > **CR Business Unit Security**).

This example illustrates the fields and controls on the CR Business Unit Security page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Business Unit	Enter the business unit for which you want to grant the user access.
Access Code	Indicates the type of access a user has to a particular business unit. Since security is granted when you add a row to this table, this field displays a value of *Read/Write.*

Examining a Query Security Example

The two methods of applying business unit security to PeopleSoft Query are:

- Using the PeopleTools Query Security Record function and one of the delivered Business Unit Security records (AV_BU_SCRTY_VW and AV_BU_SCRTY_DES).

  Use this method to provide records for which the user population can create queries that are automatically secured by PeopleTools.

- Using a subquery and the query metastring %OPERATORID.

  Use this method to develop queries that are created centrally for the user population but available for users to run on their own.

Three delivered queries are provided to illustrate the two methods:

- AV_SECURITY_EXAMPLE_NONE
- AV_SECURITY_EXAMPLE_SECURED
- AV_SECURITY_EXAMPLE_SECURED2

Unsecured Example

The query AV_SECURITY_EXAMPLE_NONE is an unsecured query of Recognitions with the following criteria:

- Credit type *Hard.*
- Person recognitions only.
- Posted.

- Not adjusted.
- Institution equal to *PSUNV.*

The result of this query is the data to which the query security is applied in the next two examples. To see the effect on the query results with each type of setup, run the query as a user with access to all business units and then as a user with access to only one business unit.

Owning Unit	**Sess No**	**Gift No**	**Gift Amt**	**Gift Type**	**ID**	**Name**	**Recog**	**Recog Amt**	**Recog %**
MEDBU	92	200	2,500 USD	PP	AV0008	Carroll, James	Hard Credit	2,500 USD	100
MEDBU	92	201	500 USD	PP	AV0010	Kuney, Dara	Hard Credit	500 USD	100
PSUNV	69	134	100 USD	G	DM0049	Nguyen, Kimberly	Hard Credit	100 USD	100
PSUNV	70	135	250 USD	G	DM0041	Chang, Zheng	Hard Credit	250 USD	100
PSUNV	70	136	250 USD	G	DM0040	Szymborski, William	Hard Credit	250 USD	100
PSUNV	71	137	50 USD	G	DM0040	Szymborski, William	Hard Credit	50 USD	100
PSUNV	71	138	100 USD	G	DM0040	Szymborski, William	Hard Credit	100 USD	100
PSUNV	71	139	USD 150	G	DM0040	Szymborski, William	Hard Credit	150 USD	100
PSUNV	71	140	200 USD	G	DM0040	Szymborski, William	Hard Credit	200 USD	100
PSUNV	71	141	200 USD	G	DM0040	Szymborski, William	Hard Credit	200 USD	100
PSUNV	71	142	250 USD	G	DM0040	Szymborski, William	Hard Credit	250 USD	100

PeopleTools Query Security Record Function

The next query, AV_SECURITY_EXAMPLE_SECURED, includes a record, AV_RECOG_SEC_VW, that has a security view attached to it via the Query Security Record attribute. In this case, the Query Security Record is AV_BU_SCRTY_DES. This record is a view of PS_AV_SCRTY_BU_TBL that substitutes the **AV_DES_BU** field for the **Business Unit** field. When a record has a Query Security View attached, PeopleSoft Query automatically adds a filter of {Security_Record}.OPRID = %OPERATORID. At runtime, the %OPERATORID string is substituted with the user ID of the current user. PeopleTools also joins the record and its Query Security record by other common keys. In this manner, the user only sees the AV_RECOG_SEC_VW records to which they have security.

With the same data set and a user who only has access to the business unit *MEDBU,* the results are as follows (notice the absence of any data for the *PSUNV* business unit):

Owning Unit	***Sess No***	***Gift No***	***Gift Amt***	***Gift Type***	***ID***	***Name***	***Recog***	***Recog Amt***	***Recog %***
MEDBU	92	200	USD 2, 500	PP	AV0008	Carroll, James	Hard Credit	USD 2, 500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100

Using a Subquery for Security

The final query, AV_SECURITY_EXAMPLE_SECURED2, is similar to the unsecured example discussed previously in that it uses the base unsecured tables. In this case, however, a subquery is added to provide the join to the Business Unit Security table and only return rows to which the current user has authority. Because security is applied to the designation business unit in this example, the record AV_RCG_DES is substituted for the record AV_RECOGNITION from the unsecured query. The field **AV_DES_BU** is now available for applying the query security. The subquery appears as a filter on the **AV_DES_BU** field when the Criteria tab is selected. The subquery uses the AV_SCRTY_BU_TBL and criteria of OPRID = %OPERATORID to substitute the user ID of the user currently executing the query.

With the same data set and a user who only has access to the business unit *MEDBU,* the results are as follows (notice the absence of any data for the *PSUNV* business unit):

Owning Unit	***Sess No***	***Gift No***	***Gift Amt***	***Gift Type***	***ID***	***Name***	***Recog***	***Recog Amt***	***Recog %***
MEDBU	92	200	2,500 USD	PP	AV0008	Carroll, James	Hard Credit	2,500 USD	100
MEDBU	92	201	500 USD	PP	AV0010	Kuney, Dara	Hard Credit	500 USD	100

Chapter 22

Creating and Maintaining User Profiles

Understanding User Profiles Security

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*.

To provide self-service access to an individual, create a user profile by selecting **PeopleTools** > **Security** > **User Profiles** > **User Profiles.** You then add a password and all the security that the individual needs to access the site. The User Profiles Management process enables you to create and maintain user profiles in batch. You must understand how a user profile is created before you run the User Profiles Management process.

Warning! Before you use this process, make sure that you understand how PeopleTools security works. When you provide database access to a large number of people, you can only revoke the access manually. A user with a high level of security in the institution should be in charge of running and setting up the process. Few people should have access to the user profiles management setup and process pages.

The User Profiles Management Application Engine process (USERPROFILE) consists of five main processes. These processes enable you to:

- Create new user profiles and add role for the user IDs.
- Delete a role from user profiles.
- Add a role to existing user profiles.
- Assign user preferences (default values) for the user IDs, including security values needed for the online credit card process.
- Update inbound Security Assertion Markup Language (SAML) definition.

You can run these five processes individually or all at once. The User Profiles Management process runs the five processes one role at a time. The mass change selects a group of people—for example, applicants—and then runs the processes based on a role (for example, the Applicant role). The first four processes use temporary tables so you can validate the processes' actions. These temporary tables are useful if you run the User Profiles Management process for many roles at once. A cleanup page enables you to delete these temporary tables.

The User Profiles Management process enables you to create user profiles and assign user IDs and passwords to groups of individuals. You can select which algorithms to use for creating the user ID and password and assign a checklist, a communication, or a comment to the user ID. The communication can include a letter that informs new users of their user IDs and passwords for access to the web.

The User Profiles Management process enables you to maintain existing user profiles by adding or deleting roles to grant or remove page access. It can also set up the user preferences, which are default values, for basic fields like Academic Career and Academic Institution. If the institution accepts credit cards, you can use the feature to give appropriate security access for the online credit card functionality.

The User Profiles Management process also enables you to update the PeopleTools inbound SAML definition for multiple user IDs at once. This option allows provisioning of security to web services that are secured by WS-Security SAML token profile (instead of Username token profile). An example of the use for this option is with the Simplified Campus Experience (SCE) feature in which a user is authenticated up front with a user ID and a password, and once authenticated, the SCE application can call a number of other SAML secured web services without supplying a password in the web service request (user ID only is needed), thus without having to store the user's password.

The system uses mass changes to select the population of individuals for whom you want to create or maintain user profiles.

See *PeopleTools: Security Administration*

See *PeopleTools: Integration Broker Administration*

Delivered Mass Changes for User Profiles Management

Several mass change examples that you can use with the User Profiles Management process are delivered with this application.

These mass change examples are delivered:

- Userprofile - Advisor.
- Userprofile - Applicant.
- Userprofile - Contributor.
- Userprofile - Employee.
- Userprofile - Former Student.
- Userprofile - Fundraiser.
- Userprofile - Graduate.
- Userprofile - Instructor.
- Userprofile - Prospect.
- Userprofile - Recruiter.
- Userprofile - Student.

Note: If you elect to use the Dynamic Role Member Assignment process (DYNROLE_PUBL) that is provided with PeopleTools to assign roles to already existing user IDs make sure the queries you create have the same criteria as the mass changes you are using.

The *PeopleTools PeopleBook: Security Administration* contains more information about the Dynamic Role Member Assignment process.

Preparing for User Profiles Management

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*.

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)

Before you run the User Profiles Management process, you must complete the setup described in this section. You should complete the setup in the order shown.

Warning! Make sure you understand PeopleSoft security before you attempt to use the User Profiles Management process.

This section provides an overview of the creation of the model user ID and discusses how to:

1. Create the model user ID.
2. Enter the model user ID description.
3. Set up the roles.
4. Set up permission lists.
5. Set up primary permission lists.
6. Set up mass changes.
7. Set up event IDs for the communication, checklist, and comment (3C) engine.
8. Set up communications.
9. Set up checklists.
10. Set up comments.
11. Set up a certificate alias.

See *PeopleTools: Security Administration*

Understanding the Creation of the Model User ID

The User Profiles Management process creates user profiles based on a user ID that serves as a model. You create user IDs or user profiles in the User Profiles component USERMAINT (**PeopleTools** > **Security** > **User Profiles** > **User Profiles.**

For example, use the delivered model user ID *SCC_MODEL* for the Campus Solutions model. You only need to complete the first two pages in the User Profiles component. The other pages in the component do not contain any fields that the User Profiles Management process uses.

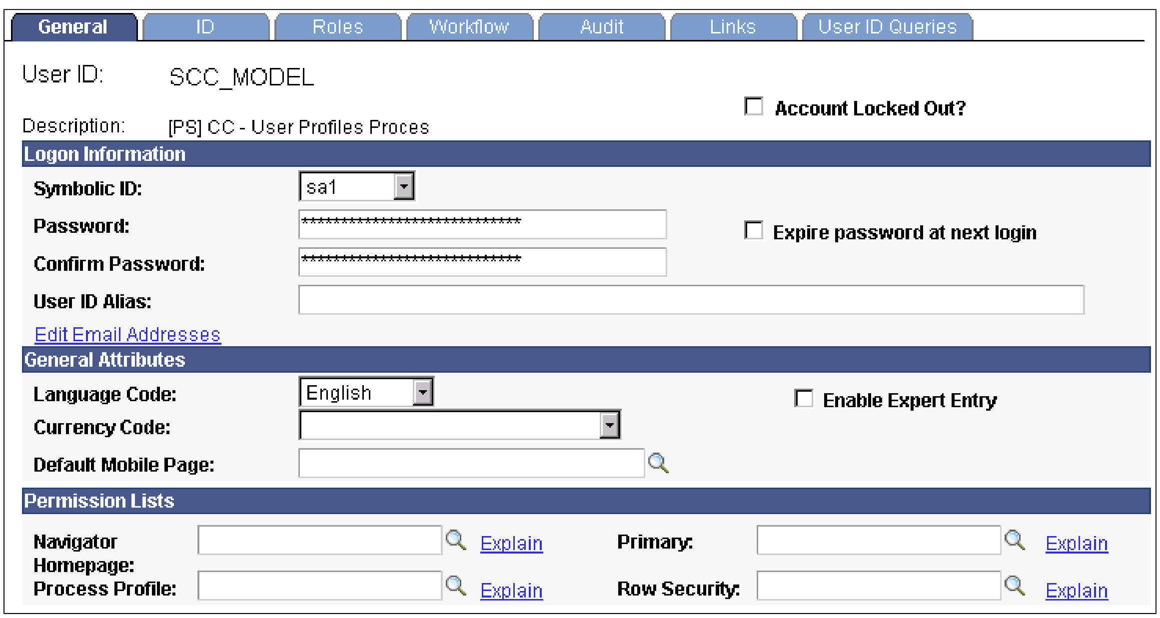
Pages Used to Prepare for User Profiles Management

Page Name	***Definition Name***	***Navigation***	***Usage***
User Profiles - General	USER_GENERAL	**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **General**	Create a user ID that the User Profiles Management process uses as a clone (model) for creating user profiles.
User Profiles - ID	PSOPRALIAS	**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **ID**	Enter the ID type *None* and a description for the model user ID that the User Profiles Management process uses for creating user profiles.

Creating the Model User ID

Access the User Profiles - General page (**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **General**).

This example illustrates the fields and controls on the User Profiles - General page. You can find definitions for the fields and controls later on this page.



Add a new value to create a user ID or used the delivered example called SCC_MODEL.

Note: The Account Locked Out functionality is not cloned for the user profiles created in batch. When the user profiles are created, they are ready for the self-service users to access the site.

The system clones these fields to create these user profiles: **Symbolic ID, Language Code, Navigator Homepage, Process Profile, Primary,** and **Row Security.**

You should *always* select a symbolic ID, regardless of the role for which you are running the process. For example, if you are running the process using the role Prospects and you believe the role does not need a symbolic ID, then consider that when prospects become applicants or students, they *do* need a symbolic ID. There is no background process to create one.

Enter a password and confirm it. These fields are required on this page, but the system *does not* clone the password when you create the new user IDs.

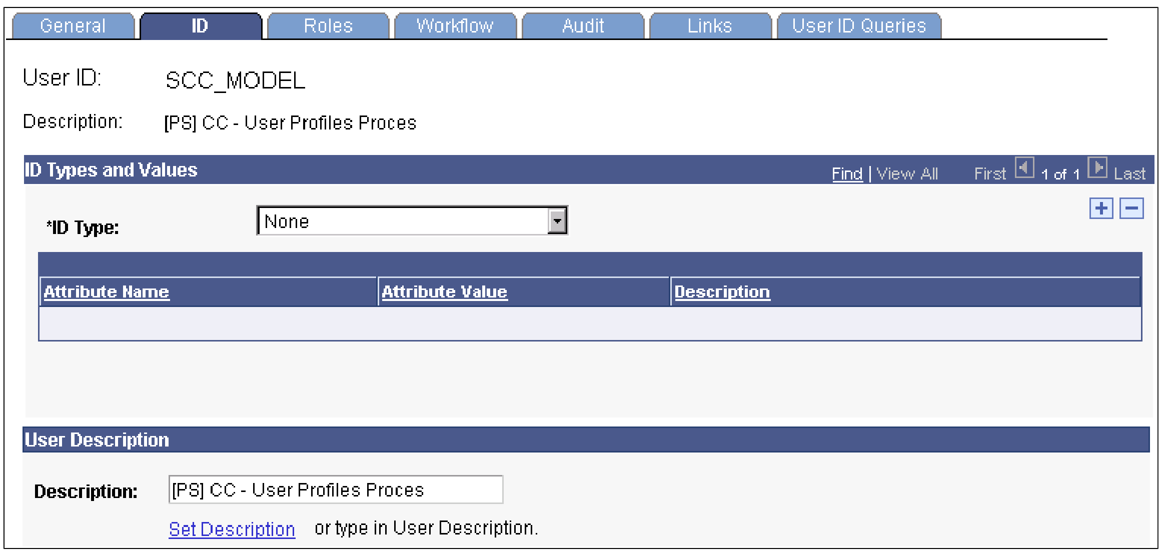
Related Links

Setting Up Permission Lists

Entering the Model User ID Description

Access the User Profiles - ID page (**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **ID**).

This example illustrates the fields and controls on the User Profiles - ID page. You can find definitions for the fields and controls later on this page.



The system uses none of the fields on this page during the User Profiles Management process. However, the component requires an ID type. Select an ID type of *None.* This value is not cloned by the User Profiles Management process. Use the User Profiles Mass Creation setup page to set up the ID type to use for the user profiles that you create.

Field or Control	***Description***
Attribute Value	The process automatically adds a value for each user profile that you create.

User Description

Field or Control	***Description***
Description	Enter the name for the model user ID.

Note: You do not need to enter any other fields than the ones described when you create the model user ID to be used by the User Profiles Management process. None of the fields on this page are cloned.

Setting Up the Roles

PeopleTools mandates the use of Remote Security Administrator Role Grant Capability in order to provision roles to other users.

Users who deploy Create and Maintain User Profiles should assess their security setup for and modify any user role which would allow access to Setup and Run the User Profile Management process and effectively assign other roles to User Profiles. Those role definitions must be updated to include Role Grant definitions.

You must define the roles that the User Profiles Management process assigns to self-service users. For example, you might want to have roles for applicants, students, prospects, instructors, or recruiters.

Consider the names of the delivered mass changes when creating the roles. For example, the mass change User Profile - Applicant could be used to assign the role of Applicant. Refer to the list of delivered mass changes in previous topics.

See *PeopleTools: Security Administration*, “Implementing Distributed User Profiles”.

Related Links

Setting Up Mass Changes

Setting Up Permission Lists

You must set up a permission list to give self-service users access to pages. You should at least give self-service users access to the Campus Personal Information pages if you licensed the PeopleSoft Campus Self Service product. You set up permission lists in the Permission Lists component **(PeopleTools > Security > Permissions & Roles > Permission Lists).**

Related Links

“Understanding PeopleSoft Campus Self-Service Personal Information” (Campus Self Service)

Setting Up Mass Changes

For each role that you create, you must create a corresponding mass change to define the search criteria that will identify a population. The Campus Solutions system comes with several mass change examples that you can use to create your own.

See *PeopleTools: Data Management*

Related Links

Delivered Mass Changes for User Profiles Management

Setting Up Event IDs for the 3C Engine

To assign a communication, checklist, or comment to the user IDs that you create with the User Profiles Management process, you must set up a 3C engine event ID.

Related Links

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

Setting Up Communications

To send a letter to notify new users of their user IDs and passwords, set up a communication. Make sure the letter code that you create in the Standard Letter table has these characteristics:

- Function equal to *Gen* (general).
- SQC name equal to *CCLTRWOL.*

Without having this specific SQC name, the Letter Generation SQR process (CCLTRGEN) does not extract the user IDs and the passwords to print on the letters. To facilitate printing letters with the user IDs and passwords, you can use the delivered template called CCLTROPR.doc. To use this template, create a letter code called *OPR.* You must also create a communication speed key (also called a comm key) and an event ID.

Warning! Do not modify the SQC named CCLTRWOL.sqr in any way.

The User Profiles Management process enables you to assign more than one communication. For example, if you are creating user profiles for the prospects for next term, you can create an event ID with different comm keys. One might include a letter code for a letter communicating user IDs and passwords, a second might be for a postcard for an invitation to an open house, and a third might be for an admission package.

Warning! The User Profiles Management process assigns communications *only* to individuals with a user profile created by the process.

Related Links

"Understanding Communication Management" (Campus Community Fundamentals)

Generating Password Notification Letters

Setting Up Checklists

To assign a checklist code to self-service users, you must create checklist items and a checklist code, and you must add the checklist to the event ID. A checklist could be used for the users' list of things to do.

Warning! The User Profiles Management process assigns checklists only to the individuals who have a user profile created by the process.

Related Links

“Understanding Communication Management” (Campus Community Fundamentals)

Setting Up Comments

You can assign a comment to the self-service users. For example, you might need to know whether an individual's user profile was created by the User Profiles Management process. You could create this comment: this individual's user ID was created by the User Profiles Management process. To do this, you create a comment category and add it to the event ID.

Warning! The User Profiles Management process assigns comments only to the individuals who have a user profile that is created by the process.

Related Links

“Understanding Comments” (Campus Community Fundamentals)

Setting Up a Certificate Alias

In order to update the user profiles with inbound SAML definition, Certificate Alias values need to be defined in your system. The section “Installing Application Server-Based Digital Certificates” in PeopleTools documentation provides further information.

See *PeopleTools: Integration Broker Service Operations Monitor*

Setting Up User Profiles Management

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*.

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 user profiles, use the User Profiles Mass Creation component (OPER_LOAD).

The User Profiles Mass Creation component is the setup component for the User Profiles Management process. When you access the component, select a role name. That role is added to user profiles or deleted from existing user profiles, depending on the processes you select when you run the User Profiles Management process.

On the first page of the component, select the mass change that you want to use to select a group of individuals. You select individuals whose role you want to add or delete in new or existing user profiles. You can then review the list of these individuals whose user profiles you plan to create or modify. The individuals appear in a search results grid at the bottom of the page after you run the mass change. The list provides a count of the number of IDs selected. On the first page, you also determine how the user ID and passwords are created. You can also assign 3C items and create a result table, which is a temporary table that holds the new user IDs and their nonencrypted passwords.

On the second page of the component, you select the user preferences (default values) to assign to the user IDs. You also set IDs to use the online credit card functionality.

This section discusses how to:

- Select users.
- Assign user preferences.

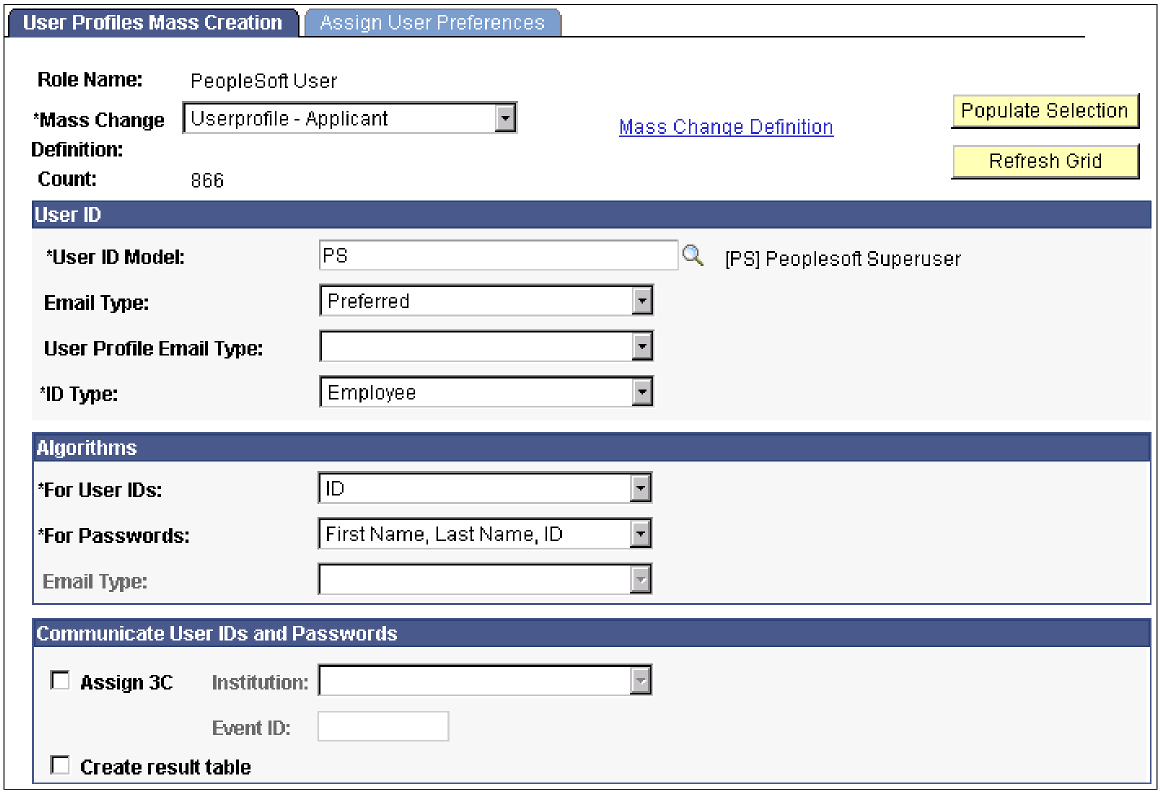
Pages Used to Set Up User Profiles Management

Page Name	***Definition Name***	***Navigation***	***Usage***
User Profiles Mass Creation	OPER_ROLE_DEFN	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Profiles Mass Creation** > **User Profiles Mass Creation**	Select the users to manage (using a mass change definition) and define other parameters, including the algorithms for creating user IDs and passwords and the model user ID. You can also assign 3C IDs to the user ID that you create.
Assign User Preferences	OPER_ROLE_DEFN_ASS	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Profiles Mass Creation** > **Assign User Preferences**	Select user preference default values for institution, academic career, term, and aid year. You can also set up the values for institution set and business unit if the institution uses the online credit card process.

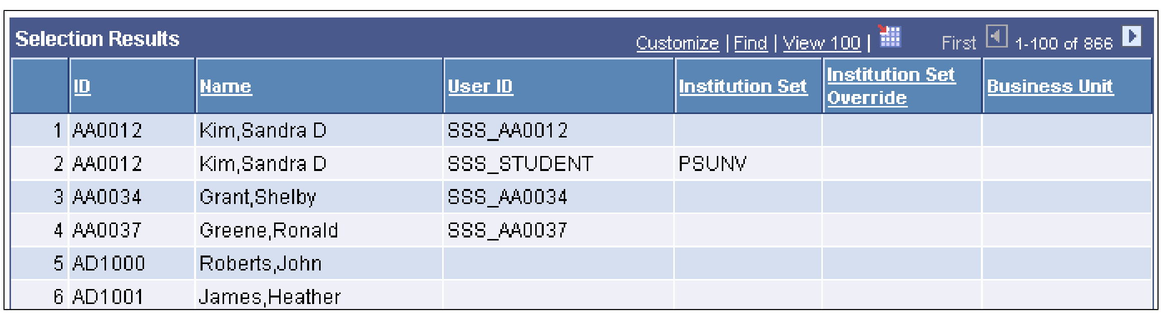
Selecting Users

Access the User Profiles Mass Creation page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Profiles Mass Creation** > **User Profiles Mass Creation**).

This example illustrates the fields and controls on the User Profiles Mass Creation 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 User Profiles Mass Creation page (2 of 2). You can find definitions for the fields and controls later on this page.



	ID	Name	User ID	Institution Set	Institution Set Override	Business Unit
1	AA0012	Kim,Sandra D	SSS_AA0012			
2	AA0012	Kim,Sandra D	SSS_STUDENT	PSUNV		
3	AA0034	Grant,Shelby	SSS_AA0034			
4	AA0037	Greene,Ronald	SSS_AA0037			
5	AD1000	Roberts,John				
6	AD1001	James,Heather				

Enter the mass change that the system uses to create the list of users to process. Click the **Mass Change Definition** link to access the Mass Change Definition component, where you can select different parameters for the mass change selection.

Note: It is good practice to always regenerate a mass change prior to using it, even if you didn't modify the criteria. That way, you ensure that you are using the latest data.

Field or Control	Description
Count	Displays the number of users selected by the mass change. This field is populated after you click the **Populate Selection** button.
Populate Selection	Click to run the selected mass change. The **Selection Results** grid displays a list of person IDs when the mass change processing is complete. Generate the mass change each time that you create user profiles. That way, you ensure that you are using the latest data.
Refresh Grid	Click to delete the mass change results from the buffer and from the Search Results table. If you do not refresh the grid after you use it, it may take a while to open this page the next time that you access it.

User ID

The fields in this area are used as the basis for the new user profiles.

Field or Control	Description
User ID	Enter the user ID that you want to use as the model for the user profiles. For example enter the SCC_MODEL user ID.
Email Type	Select the email type to enter in the user profile. The system uses the EMAIL_ADDRESSES record to determine the email address, based on the type that you enter. The email address (for the IDs that have one) is added in. the Email Addresses page of the User Profiles component **(PeopleTools > Maintain Security > Use > User Profiles > Edit Email Addresses link).** If the user does not have an email address of the selected type, no email address is added to the user profile. If you select*Preferred,* the system uses the email address marked as the preferred address on the Electronic Addresses page. **Note:** If you select a value for **Email Type,** you are required to enter an equivalent value in the **User Profile Email Type** field, and vice versa.

Field or Control	***Description***
User Profile Email Type	Because the user profile stores different Email Type values than the ones used throughout the applications, select the corresponding email type that will match the type previously selected. Values are:*Blackberry, Business, Home, Other,* and *Work.* These values are delivered with the system as translate values and should not be modified.
ID Type	By default, the system uses the value *Employee.* You can run the User Profiles Management process only for that ID type.

Algorithms

Enter the algorithms for the system to use when creating new user IDs and passwords.

Field or Control	***Description***
For User IDs	Select *ID* or *Email* to indicate which value to use to create the user IDs for the selected users. If you select*ID,* the new user ID is the same as the ID. If you select *Email,* you must select the Email Type For User ID to be used.

Field or Control	Description
For Passwords	Select to indicate how the system creates the new passwords for the new user IDs. Select *First Name, Last Name, ID* to create passwords using the first two characters of the first name plus the first two characters of the last name plus the ID, if the ID is four characters or less. If the ID has more than four characters, the last four characters of the ID are used. Enter *Random Creation* to create more secure passwords. The random password is created by using the 26 letters of the alphabet and numbers from 1 to 9. The length of the password is determined by the **Minimum Password Length** field on the Password Controls page **(PeopleTools > Maintain Security > Setup).** If the value in this field is less than *8,* then a password length of eight characters is used. If the **Required Number of Specials** field on the Password Controls page is set to a value other than *0,* then the same number of special characters (that is, *@, #, $, %, ^, &, *, ~, !, ?*) is randomly picked and appended to the end of the password.
Email Type	Select the email type to use. If you select*Preferred,* the system uses the email address marked as the preferred address on the Electronic Addresses page. The new user IDs are the characters before the @ symbol, excluding spaces and special characters. **Important!** If you select*Email* in the **For User IDs** field and the user does not have the email type that you select, a user profile is *not* created for the user. Instead, an error row is added to the temporary table (PS_ERR_LOG_USRPRF) with the error code *4*.

Communicate User IDs and Passwords

Field or Control	***Description***
Assign 3C	Select to assign communications, checklists, or comments to the user IDs that the process creates. If you select this check box, select a 3C engine event ID that the system uses to determine which communications, checklists, and comments to assign. Any communications, checklists, or comments should be created in *one* event ID. You can use this field to assign a communication that tells new users their user IDs and passwords for an internet site. When the User Profiles Management process runs with the **Create User Profiles** option and the **Assign 3C** option selected, the system invokes the 3C engine. 3C engine adds communications, checklists and comments directly to the communication tables, checklist tables, and comments tables, respectively. Consequently, all new users automatically receive the communications, checklists, and comments that are assigned.
Institution	Select the institution associated with the event ID. This information is needed for the 3C engine.
Event ID	Select the event ID that you created to assign communications, checklists, and comments. This information is needed for the 3C engine. See Generating Password Notification Letters.
Create result table	When this check box is selected, a temporary result table is created when you run the User Profiles Management process. This temporary table is the *only* place where the newly created passwords appear nonencrypted. If you do not select this check box, the passwords cannot be seen and therefore cannot be communicated to the new self-service users. **Note:** The check box is automatically selected at save time if you select the Assigned 3C option using an event ID that has been set up with a comm key that includes a letter code with the unique SQC CCLTRWOL. The Letter Generation process uses the temporary table to print the user IDs and the passwords on the letters.

Selection Results

Click the **Populate Selection** button to populate this area.

Field or Control	***Description***
ID	Displays the list of person IDs that match the criteria specified in the selected mass change. If an ID is listed multiple times, more than one user ID was previously created for the same ID. **Note:** The User Profiles Management process does not create a user ID for the person IDs that already have a user ID. If you see in the gird that a person ID has multiple user IDs, it is because an administrative user manually created them.
Name	Displays the name associated with the person ID.
User ID	Displays the user ID assigned to the person ID. This information enables you to determine which IDs have a user ID versus the ones who do not. The User Profiles Management Application Engine process (USERPROFILE) creates a user ID for the one that do not have one. **Note:** If a user ID already exists, the process *does not* create a new one.
Institution Set	Displays the institution set assigned to a user ID by the Assign User Preferences Application Engine process. This value is mostly used by the online credit card process. If a user ID already has an institution set associated with it, the institution set is overridden by the Assign User Preferences process if the value that you select on the Assign User Preferences page is different from the user ID's institution set. However, if an administrator has manually entered an institution set, the process does not change the manually entered institution set.
Institution Set Override	Displays the institution set entered on the Self Service Institution Set Override page. The background process *does not* override this value. See Understanding Student Financials Security.

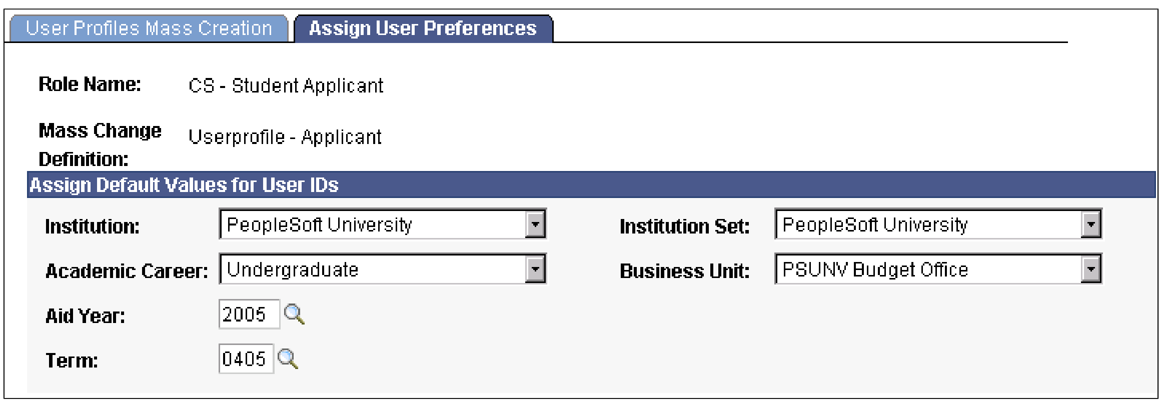
Field or Control	*Description*
Business Unit	Displays the business unit assigned to a user ID by the Assign User Preferences process. This value is used by the online credit card process. If a user ID already has a business unit associated with it, the business unit is overridden by the Assign User Preferences process if the value that you select on the Assign User Preferences page is different from the user ID's business unit.

See *PeopleTools: Security Administration*

Assigning User Preferences

Access the Assign User Preferences page ((**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Profiles Mass Creation** > **Assign User Preferences**).

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



The values that you select on this page override the values created for the user ID in the OPR_DEF_TBL_CS table.

Assign Default Values for User IDs

Field or Control	*Description*
Institution, Academic Career, Aid Year, and **Term**	These fields are used as user preferences when the user accesses pages that include these fields.
Institution Set	This value is used by Student Financials. Enter a value if you use online credit card processing.

Field or Control	***Description***
Business Unit	This value is used by Student Financials. Enter a value if you use online credit card processing.

Related Links

Setting Security for Credit Cards

Running the User Profiles Management Processes

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*.

To set up user profile management, use the User Profiles Management component (RUN_CC_USERPROFILE).

Before running the User Profiles Management process, regenerate the mass change that you plan to use.

The User Profiles Management process consists of a series of mass changes templates and definitions, as well as a series of application engine programs.

This section discusses how to run the processes that are part of User Profiles Management process.

Page Used to Run the User Profiles Management Processes

Page Name	***Definition Name***	***Navigation***	***Usage***
User Profiles Management Processes	RUNCNT_USERPROFILE	**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **User Profiles Management** > **User Profiles Management Processes**	Run any of the five user profile processes. You can create user profiles, delete or assign a role to user profiles, assign user preferences, and assign or update SAML definition values.

Running the User Profiles Management Process

Access the User Profiles Management Processes page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **User Profiles Management** > **User Profiles Management Processes**).

Field or Control	*Description*
Role Name	Enter the name of the role to create or maintain. The available options correspond to the roles for which you set up a mass change on the User Profile Mass Creation page.
Detail	Click to access the User Profiles Mass Creation page, where you can review and modify the setup before running the processes.

The five check boxes represent the five processes that you can run when you run the USERPROFILE Application Engine process. You can select one or more of these check boxes.

Field or Control	*Description*
Create User Profiles	Select to create a user profile for the IDs that are selected by the mass change (if they do not already have user IDs). The role that you selected is also added to the new user IDs. The user IDs and the passwords are based on the algorithms that you select on the User Profiles Mass Creation setup page. When this check box is selected, the User Profiles Management process creates a temporary table to list all the user IDs that are created. This temporary table is called PS_USRPRF_NWID_TMP. If on the User Profiles Mass Creation setup page you select to create the result table, this process creates the temporary table.
Delete Role in User Profiles	Select to delete the role from the user IDs that are *not* selected by the mass change. This option deletes the role name on the user profiles that no longer meet the criteria for the specified role name. For example, to provide self-service access to the applicants of the current term, this function deletes the Applicant role for all the user profiles that have the role but are not part of the current term. When this process runs, it creates a temporary table so you can review the IDs for which the specified role is removed. The temporary table is called PS_USRPRF_DEL_TMP.

Field or Control	Description
Assign Role	Select to assign the role to the existing user IDs that are selected by the mass change. This process creates a temporary table called PS_USRPRF_ASG_TMP. It lists the user IDs that have the role assigned to them. **Note:** This is the same process that you can run from the Dynamic Members page in the PeopleTools, Security, User Profiles, User Profiles, Roles component. If you assign roles using that component, be sure the query that you use has the same criteria as the mass change. See Delivered Mass Changes for User Profiles Management.
Assign User Preferences	Select to assign the user preferences from the Assign User Preferences page. These user preferences are assigned to all user IDs selected by the mass change. If a user ID already has a value set for the preferences, it is overridden by this process (unless a value is added to the institution set override). If you are using online credit card processing, you should select this process to assign a business unit and an institution set to the user IDs. The process creates a temporary table called PS_ASSN_SETVAL_TMP. Use this table to review the IDs that have the user preferences assigned to them.
Update Inbound SAML Definition	Select to assign or update the inbound SAML definition to the user IDs selected by the mass change. To review the SAML definition updates, review the changes on the SAML Inbound Setup page **(PeopleTools > Security > SAML Administration Setup > SAML Inbound Setup)** for the user IDs selected in the mass change. When selected, the **Certificate Alias**, **Issuer**, and **QualifierName** fields appear on the page. **Note:** The process does not create a temporary table to review which records received assigned or updated SAML values. ***Warning!*** To use this option, administrators must have access to a security role that contains a permission list that grants access to the SCC_PTSAML_CI component interface.
Certificate Alias	Enter the sender's certificate alias name that you set up under the “Setting Up a Certificate Alias” section. See “Setting Up a Certificate Alias”
Issuer	Enter the domain name of the issuing entity.

Field or Control	*Description*
QualifierName	Enter the domain name of the issuing entity.
Comment	Enter any comments about the selections. The selected settings are associated with the user ID and the run control ID, so when you use the same settings, you can see the comments. This field is for informational purposes only.
Explain	Click these links to view the explanation for the selected check box.
Run	Click to run the User Profiles Management Application Engine process (USERPROFILE). When you run this process, do not select a type or a format on the Process Scheduler page.

Error Log Information

An error log (PS_ERR_LOG_USRPRF) is created by the User Profiles Management process that lists any IDs for which a user profile is not created. Review the error log after running any of the processes. In the error log these error codes are used:

Field or Control	*Description*
1	In the Assign Role Application Engine process, the save method was not completed for the existing user ID. The system also assigns this error code if it encounters an invalid user ID. A valid user ID must meet these conditions: • Has no space. • Has no comma. • Is not equal to PPLSOFT. • Is not longer than 30 characters.
2	In the Create User Profile Application Engine process, the save method was not completed for the newly created user ID.
3	In the Create User Profile process, the newly created user ID cannot be saved because the user ID already exists.
4	In the Create User Profile process, no user ID can be created because *Email* was selected in the **For User IDs** field on the User Profiles Mass Creation page.

Field or Control	***Description***
5	In the Delete Role Application Engine process, the save method was not completed for the existing user ID.

After you run the process, you can access the User Profiles Mass Creation page **Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Profiles Mass Creation** for the role you just ran and click the **Populate Selection** button to see which user IDs were created. You can also see which business unit and institution set were assigned, if any where defined. In addition, you can review the temporary tables that are created by the processes.

See *PeopleTools: Applications User's Guide*

Generating Password Notification Letters

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*.

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)

You can create letters to send notifications to new users whose IDs are created by the User Profiles Management process. You can notify them of their assigned user ID and password using the Letter Generation process.

Note: This section refers to the temporary result table, which includes sensitive information including user IDs and passwords. For security reasons, this documentation does not explain how the temporary result table functions.

This section discusses how to:

- Set up password notification letters.
- Run the letter generation process for password notification letters.

Pages Used to Generate Password Notification Letters

Page Name	*Definition Name*	*Navigation*	*Usage*
User Profiles Mass Creation	OPER_ROLE_DEFN	**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Profiles Mass Creation** > **User Profiles Mass Creation**	Select the users to manage (using a mass change definition) and define other parameters, including the algorithms for creating user IDs and passwords and the model user ID. You can also assign 3C IDs to the user ID that you create.
Letter Generation - General Parameters	RUNCTL_LTRGEN1	**Campus Community** > **Communications** > **Letter Generation** > **General Parameters**	Run the process that generates password notification letters.

Setting Up the Password Notification Letters

Access the User Profiles Mass Creation page (**Set Up SACR** > **Security** > **Secure Student Administration** > **Setup** > **User Profiles Mass Creation** > **User Profiles Mass Creation**).

To set up information for notification letters and use the Letter Generation process, you must enter the appropriate event ID and institution on this page. When the User Profiles Management process runs with the *Create User Profiles* option selected, it invokes the 3C engine. The 3C engine adds communications directly to the communications table, so all of the new users that are created have a communication assigned to their records.

To create password notification letters, the event ID must include a comm key that has been defined with a letter code. You set up the letter code with the function equal to *General* and the SQC name equal to *CCLTRWOL.* Complete this setup on the Standard Letters page.

Warning! Do not modify the SQC named CCLTRWOL.sqr in any way.
When the event ID includes a letter code with the SQC equal to *CCLTRWOL,* the same process creates a temporary result table where all of the new user IDs and passwords are stored. The Letter Generation process reads this table to extract the passwords and the use IDs.

Related Links

"Understanding Communication Management" (Campus Community Fundamentals)

Running the Letter Generation Process (CCLTRGEN) for Password Notification Letters

After you have run the Create User Profiles process, you can run the Letter Generation process to extract the data. To run letter generation access the Letter Generation – General Parameters page (Campus Community, Communications, Letter Generation, General Parameters).

When you run the Letter Generation process for password notification letters, the system updates the temporary result table with a flag indicating that the data has been extracted and the rows can be deleted from the temporary table. After the temporary table has been cleaned up, a critical error occurs if you attempt to run a communication for password notification letters for those user IDs and passwords.

Note: When running the Letter Generation process for notification letters, make sure both the **Produce Communication** and **Complete Communication** check boxes are cleared in the **Missing Critical Data** group box. If these check boxes are cleared, the system does not extract and complete a communication if critical data (for example, address information) is missing. Consequently, you can add or correct the missing data for the individual ID specified in the log. You can then rerun the Letter Generation process. If you do not rerun the communications, be sure to use the User Profile Clean Up Processes page to delete the rows from the results temporary table, even though the Letter Generation process did not set the ready-to-delete flag. If you run the process with these check boxes selected, the system creates the communication despite the missing data and updates the temporary result table with the flag to indicate that these rows can be deleted.

Warning! When the letter generation process extracts the data, it creates a .DAT file (CCLTRGEN.DAT) and two .CSV files (CCLTR<LETTERCODE>.CSV for letters and CCLBL<LETTERCODE>.CSV for labels). These files are either stored on the temporary directory of the PeopleSoft Process Scheduler server or on the computer where the extract file path has been redirected. (You redirect the extract on the Date/Merge Parameters page of the Letter Generation component.) The passwords in the data extracts are unencrypted. No process automatically deletes the extracts. They are available for running future communications. To prevent misuse, the institution should take the appropriate security measures. For example, be sure to write the extract to a secure directory, verifying that the CCLTRGEN macro points to the same directory. Then manually delete the data extract after you have performed the merge with the letter template.

The extract file (CCLTR<LETTERCODE>.CSV files) that includes the nonencrypted passwords is overridden every time you run the Letter Generation process for the letter code that you set up to run the password notification letters. If you do not plan to run the macro to perform the merge with the data extract and the letter template right away, save the files using a different name. Make sure that they are stored in a secure folder and that they are deleted after the communication is produced.

The PeopleSoft system comes with these items specifically for generating the notification letters:

- A sample Microsoft Word template called CCLTROPR.doc for printing notification letters.

  You can modify the template or use it to create new templates so that you can create different letters. If you use this template and you do not rename it, the letter code that you create must be named OPR.

- A unique SQC called CCLTRWOL.

  The CCLTRWOL SQC generates the variable data necessary for the password notification letters associated with the letter code that you create. You should not modify this SQC.

Example

Here is an example of a password notification letter created with the sample template CCLTROPR.doc:

Example of an online access letter to a student from an institution.

July 23, 2001
Janice Diller
44125 Ventura Blvd.
Encino, CA 91465

Dear Janice,

Welcome to PeopleSoft University Online! Through the PSU Online site you'll be able to take care of most of your business with the university.

To access your information, you will need the following information:

User ID: WSR6002
Password: EUR2J54A

You are urged to keep this information private – anyone with this information will be able to access your account! Your initial word has been system generated; we recommend that you change it after you login the first time.

What you can do at PeopleSoft University's site depends on the profile we have for you in our records. If you think this is incorrect or incomplete, or if you have any other problems using PeopleSoft University on the web, please contact the computer Services Division at (313) 555-1234.

Registrar

Warning! When you merge the letter template with the extract files, a copy of the letter is saved on the local drive of the computer that was used to merge and print the letters. Be sure to delete these local copies because they contain the nonencrypted passwords.

Resolving Issues for the User Profiles Management Process

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*.

This section discusses techniques that enable you to run the User Profiles Management process successfully. If you receive an error or if a process runs unsuccessfully, try these problem solving techniques.

Mass Changes That Select No IDs

If the **Count** field on the user Profiles Mass Creation page displays *0* after you click the **Populate Selection** button, then the system selected no IDs for the process; the process ran successfully, but no IDs were created or maintained. In this case, regenerate the mass change using the mass change definition on the Generate SQL page. Be sure to save the mass change. Run the process again. If the count still shows zero, then the criteria may not match any of the data in the database.

Processes That End Abnormally

If a process abnormally ended, the next time you run it may be unsuccessful because of the data stored in these temporary tables:

- PS_ENG_COMM_TMP
- PS_EMPLID_GRP_TMP

In this case, delete the tables and run the process again.

User IDs Not Created

If no user ID was created for an ID that was selected by the mass change, look at the error log PS_ERR_LOG_USRPRF and verify if an error code was given. Error codes are documented inside the "Error Log Information" section.

Related Links

Running the User Profiles Management Process

Chapter 23

Using Mass Change

Understanding Mass Change in Campus Solutions

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*.

Campus Solutions provides many tools to process information. However, because much of what you do is unique to the institution, the application enables you to create your own unique processes. One way of performing this task is to create mass changes. For communications, checklists, and comments you can also use Campus Community's 3C engine.

See “Understanding the 3C Engine” (Campus Community Fundamentals)

The PeopleSoft Mass Change utility is a SQL generator that you use to perform high-volume business transactions, such as updating data for multiple students without accessing each student record online. Its function is similar to PeopleSoft Query, but while PeopleSoft Query retrieves data from the database, the PeopleSoft Mass Change utility makes changes to the database.

The PeopleSoft Mass Change utility is commonly used for these tasks:

- Performing high-volume, set-oriented transactions.
- Copying data from table to table.
- Archiving table data.
- Performing transactions not normally supported through the pages.

Note: The mass change types and templates delivered with Campus Solutions should serve as examples for your particular needs. The functionality provided is representative of common business practices; however, you may need to modify the delivered mass change types and templates to fit your specific requirements.

Mass change is a way of breaking down statements that alter data (such as update, insert, and delete statements) into a hierarchy of three components: types, templates, and definitions. The end user only needs to alter the simplest level to change the parameters used in a particular run. The PeopleSoft Mass Change utility includes these three components:

1. *Types* are the lowest level components.

   A mass change type defines the type of SQL statements to be generated, the records involved, and the sequence in which they run. Application developers familiar with SQL and the database design typically define mass change types.

2. *Templates* are built upon mass change types.

Mass change templates are used to specify which fields make up the WHERE clause of the SQL statement and which fields can be hard-coded with a particular value. Application developers typically define mass change templates.

3. *Definitions* are built upon mass change templates and are generally created and run by end users.

   Mass change definitions are used to specify the values and operators for each field in the statement's WHERE clause and default fields and to generate the actual SQL statement.

You can run mass change definitions individually or combine them into mass change groups and run them together.

Note: Anyone who defines mass change types or templates should have both a solid understanding of SQL and an extensive knowledge of the PeopleSoft database in question.

See *PeopleTools: Data Management*

Processing Mass Changes

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*.

Processing mass changes consists of a definition phase and a processing phase. First, you define the selection criteria and changes for the selected data; then you run the Structured Query Reports (SQRs) that process the changes you defined.

Note: The development staff must create mass change types and templates before you can use the mass change definitions discussed in this section.

This section discusses how to:

- Define a mass change.
- Process a mass change.

Pages Used for Processing Mass Changes

Page Name	***Definition Name***	***Navigation***	***Usage***
Description	MC_DEFN_00	• **Checklists > Mass Change - Checklists > Mass Change Definition > Description** • **Communications > Mass Change - Communications > Mass Change Definition > Description** • **Records and Enrollment > Enroll Students > Block Enrollment > Mass Change Definition > Description** • **Student Admissions > Processing Applications > Mass Change > Mass Change Definition > Description** • **Contributor Relations > Initiatives > Process Initiatives > Initiative Mass Change > Description**	Define the mass change.

Page Name	***Definition Name***	***Navigation***	***Usage***
Criteria and Defaults	MC_DEFN_01	• **Checklists** > **Mass Change - Checklists** > **Mass Change Definition** > **Criteria and Defaults** • **Communications** > **Mass Change - Communications** > **Mass Change Definition** > **Criteria and Defaults** • **Records and Enrollment** > **Enroll Students** > **Block Enrollment** > **Mass Change Definition** > **Criteria and Defaults** • **Student Admissions** > **Processing Applications** > **Mass Change** > **Mass Change Definition** > **Criteria and Defaults** • **Contributor Relations** > **Initiatives** > **Process Initiatives** > **Initiative Mass Change** > **Criteria and Defaults**	Define criteria and set defaults for mass changes.

Page Name	***Definition Name***	***Navigation***	***Usage***
Student Administration	MC_DEFN_SA	• **Campus Community** > **Checklists** > **Mass Change - Checklists** > **Mass Change Definition** > **Student Administration** • **Campus Community** > **Communications** > **Mass Change - Communications** > **Mass Change Definition** > **Student Administration** • **Records and Enrollment** > **Enroll Students** > **Block Enrollment** > **Mass Change Definition** > **Student Administration** • **Student Admissions** > **Processing Applications** > **Mass Change** > **Mass Change Definition** > **Student Administration** • **Contributor Relations** > **Initiatives** > **Process Initiatives** > **Initiative Mass Change** > **Student Administration**	Set specific parameters for mass change definitions. The resulting mass change SQL statements will include these parameters.

Page Name	***Definition Name***	***Navigation***	***Usage***
Generate SQL	MC_DEFN_02	• **Campus Community > Checklists > Mass Change - Checklists > Mass Change Definition > Generate SQL** • **Campus Community > Communications > Mass Change - Communications > Mass Change Definition > General SQL** • **Records and Enrollment > Enroll Students > Block Enrollment > Mass Change Definition > Generate SQL** • **Student Admissions > Processing Applications > Mass Change > Mass Change Definition > General SQL** • **Contributor Relations > Initiatives > Process Initiatives > Initiative Mass Change > Generate SQL**	Generate the SQL to run a mass change.

Page Name	Definition Name	Navigation	Usage
Execution History	MC_DEFN_03	• **Campus Community > Checklists > Mass Change - Checklists > Mass Change Definition > Execution History** • **Campus Community > Communications > Mass Change - Communications > Mass Change Definition > Execution History** • **Records and Enrollment > Enroll Students > Block Enrollment > Mass Change Definition > Execution History** • **Student Admissions > Processing Applications > Mass Change > Mass Change Definition > Execution History** • **Contributor Relations > Initiatives > Process Initiatives > Initiative Mass Change > Execution History**	View the history of a completed mass change.
Group Definition	MC_GROUP_01	• **Campus Community > Checklists > Mass Change - Checklists > Mass Change Group** • **Campus Community > Communications > Mass Change - Communications > Mass Change Group** • **Student Admissions > Processing Applications > Mass Change > Mass Change Group**	Combine mass change definitions into a group and set the execution sequence.

Page Name	*Definition Name*	*Navigation*	*Usage*
Run Mass Change	RUN_MASSCHNG	• **Campus Community > Checklists > Mass Change - Checklists > Mass Change Group** • **Campus Community > Communications > Mass Change - Communications > Mass Change Group** • **Records and Enrollment > Enroll Students > Block Enrollment > Run Mass Change** • **Student Admissions > Processing Applications > Mass Change > Run Mass Change**	Execute the mass change.
Mass Change Result	MC_CHK_RESULT	• **Campus Community > Checklists > Mass Change - Checklists > Mass Change Group** • **Campus Community > Communications > Mass Change - Communications > Mass Change Group** • **Records and Enrollment > Enroll Students > Block Enrollment > Mass Change Group** • **Student Admissions > Processing Applications > Mass Change > Mass Change Group**	View mass change results.

Defining the Mass Change

The definition phase comprises these steps:

1. Select a mass change template, and use it to create a mass change definition.

2. Outline the criteria for selecting rows, and identify the columns and values to be changed.

3. Generate the SQL statement.

Processing the Mass Change

The processing phase comprises these steps:

1. Run the Mass Change SQR to select, change, and transfer the data to temporary tables.

2. (Optional) Review the data for accuracy (recommended).

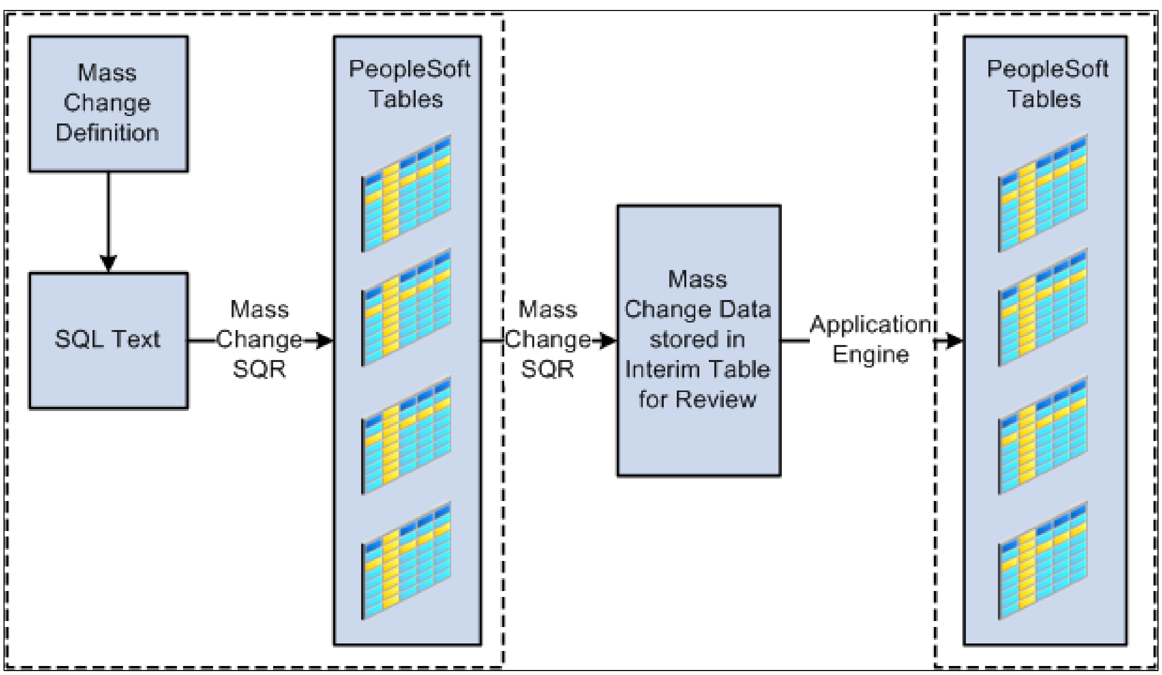
   This PeopleSoft application delivers features that enable you to review the mass change results. You can view the results of mass change definitions using the Mass Change Result page (one of the locations is **Campus Community** > **Communications** > **Mass Change - Communications** > **Mass Change Results**). Other Campus Solutions applications also have pages for reviewing mass change results; these pages are described in the documentation for the specific application.

3. Run the appropriate process to load the data from temporary tables into PeopleSoft tables (if applicable).

   For example, to insert communications or checklists, you run the 3C Engine process to insert the mass change results into the PeopleSoft tables.

This flowchart illustrates mass change integration:

Example of how mass change moves through PeopleSoft tables using SQL and Application Engine.



Setting Up Mass Change Security

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*.

Before using the PeopleSoft Mass Change utility for the first time, you should consider who in the organization should be authorized to use mass change templates and run mass changes. Because the PeopleSoft Mass Change utility is a powerful tool with the ability to modify large portions of the data, you should carefully consider mass change security.

Mass change security governs whether users assigned to a particular permission list can run mass changes online, the templates available to a user, and what mass changes the user can run. To set Mass Change security, go to **PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists** > **Mass Change.**

See *PeopleTools: Data Management*

Defining Specific Parameters for Mass Change Definitions

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*.

The Student Administration page in the Mass Change Definition component enables you to specify additional parameters that are used only in Campus Solutions.

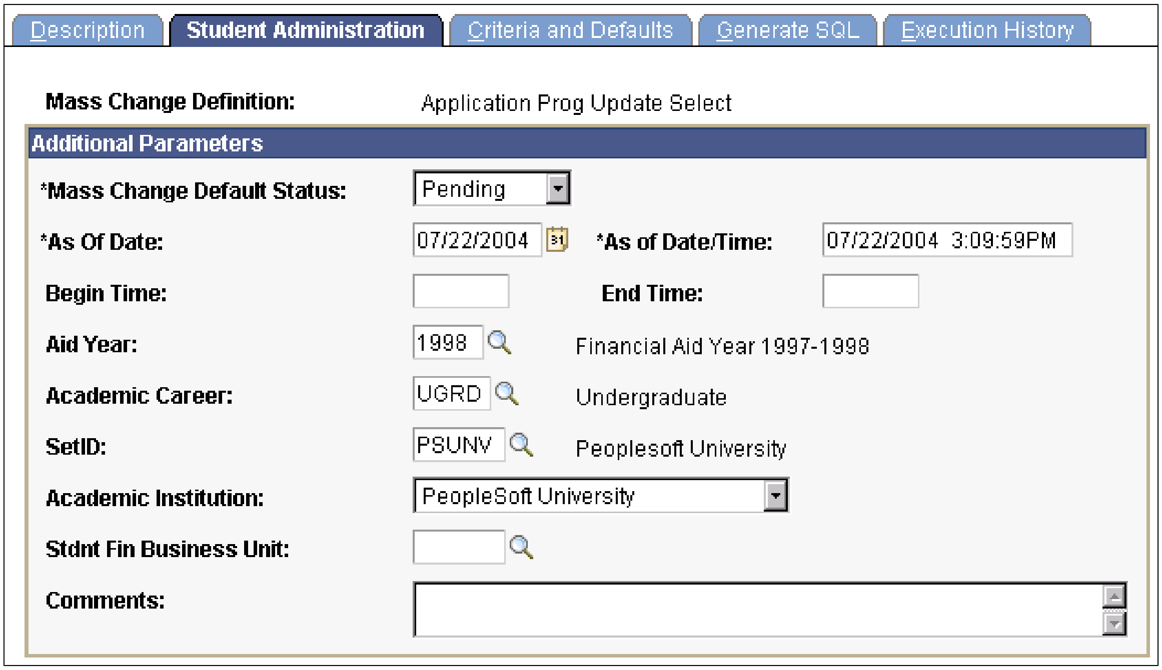
Page Used to Define Specific Parameters for Mass Change Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Administration	MC_DEFN_SA	• **Campus Community > Checklists > Mass Change - Checklists > Mass Change Definition > Student Administration** • **Campus Community > Communications > Mass Change - Communications > Mass Change Definition > Student Administration** • **Records and Enrollment > Enroll Students > Block Enrollment > Mass Change Definition > Student Administration** • **Student Admissions > Processing Applications > Mass Change > Mass Change Definition > Student Administration** • **Contributor Relations > Initiatives > Process Initiatives > Initiative Mass Change > Student Administration**	Set specific parameters for the mass change definitions. The resulting mass change SQL statements include these parameters.

Setting Specific Parameters for Mass Change Definitions

Access the Student Administration page (**Campus Community > Checklists > Mass Change - Checklists > Mass Change Definition > Student Administration.**).

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



Additional Parameters

Field or Control	*Description*
Mass Change Default Status	This field is not used by Campus Solutions. This field value sets the status value of all mass change records created when you run this mass change definition. The default status is used with mass change definitions run using database agents. Campus Solutions mass change definitions are not delivered to use database agents.
As Of Date	The current date appears by default. The value for this field must be the current date for the mass change definition to run. This field is used as a default date in certain mass change definitions. **Note:** Even if the date defaults to today's date, you must regenerate and save the mass change definition before using it. This way it will select the people in the database that meet the criteria as of today. If not it will use the last date you generated and saved the mass change definition.

Field or Control	***Description***
As of Date/Time	The current date and time appears by default when you access the page. The value for this field must be the current date and time for the mass change to run. If you make a change to the mass change definition, you must save it before you run it.
Begin Time and **End Time**	Not currently used.
Aid Year, Academic Career,SetID,Academic Institution and **Stdnt Fin Business Unit** (student financials business unit)	Enter values to be used as defaults by the mass change definition. These values are also used for prompting on the Criteria and Defaults page.
Comments	Enter any comments about this mass change definition.

See *PeopleTools: Data Management*

Chapter 24

Setting User Defaults

Entering User Defaults

To set up user defaults, use the User Defaults component (RUN_CC_USERPROFILE).

The system automatically loads default values into data pages for a particular user ID. The user default settings that you establish in the User Defaults component can be overridden on any page in the system. User defaults (which are optional) can save time and minimize data entry errors.

You need to be familiar with the pages and fields that default settings affect before you specify defaults. This topic does not describe the functionality of the particular fields discussed here. Those fields are documented in the relevant application topics.

Note: When you select default values for fields, you can select only those values for which the user ID has security access.

This section discusses how to:

- Set defaults for academic information.
- Set defaults for financial and admissions data.
- Set defaults for admissions application data.
- Set defaults for printing transcripts, award notifications, and Student and Exchange Visitor Information System (SEVIS).
- Set defaults for enrollment overrides.
- Set defaults for communication keys.
- Select the type of communication, checklist, and comment (3C) group access.

Pages Used to Enter User Defaults

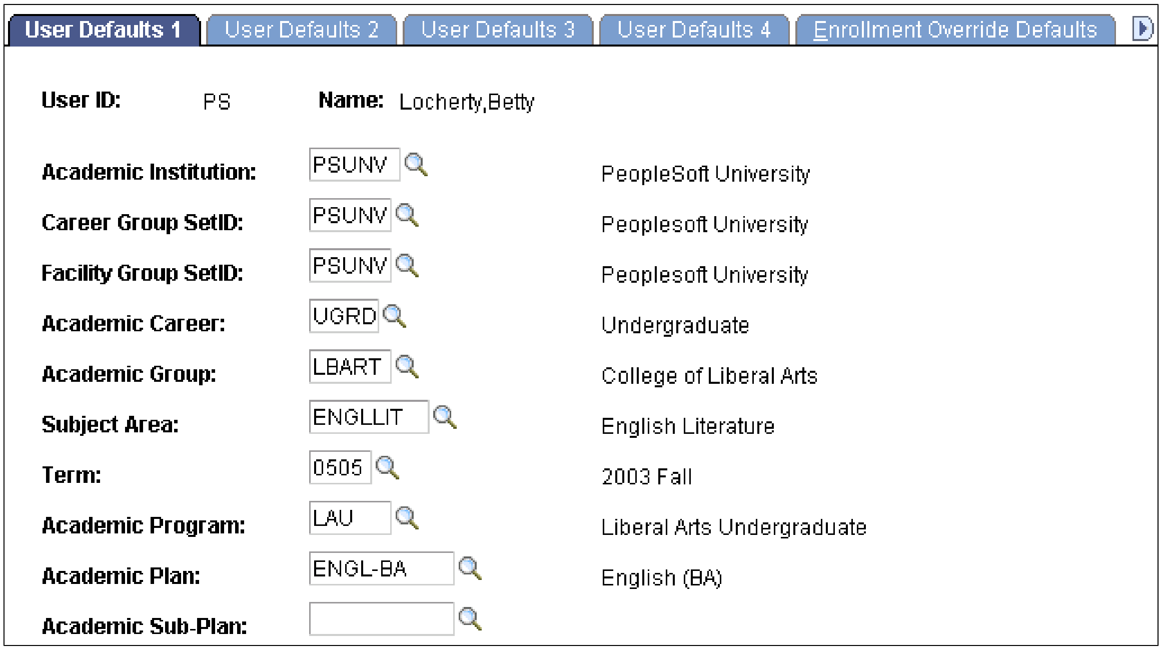
Page Name	***Definition Name***	***Navigation***	***Usage***
User Defaults 1	OPR_DEF_TABLE_CS1	**Set Up SACR** > **User Defaults** > **User Defaults 1**	Set defaults for the **Academic Institution** field, **Term** field, **Career** field, **Academic Program** field, and other fields.

Page Name	*Definition Name*	*Navigation*	*Usage*
User Defaults 2	OPR_DEF_TABLE_CS2	**Set Up SACR** > **User Defaults** > **User Defaults 2**	Set defaults for the **setID** field, **Aid Year** field, **Application Center** field, **Cashier's Office** field, and other fields.
User Defaults 3	OPR_DEF_TABLE_CS5	**Set Up SACR** > **User Defaults** > **User Defaults 3**	Set defaults for admissions application data.
User Defaults 4	OPR_DEF_TABLE_CS4	**Set Up SACR** > **User Defaults** > **User Defaults 4**	Set defaults for printing transcripts, including transcript output destination and transcript type, SEVIS processing, and award-notification printing.
Enrollment Override Defaults	OPR_DEF_TABLE_CS3	**Set Up SACR** > **User Defaults** > **Enrollment Override Defaults**	Set default enrollment overrides for a specified user ID.
Communication Speed Keys	OPR_SPDKEY_FUNC	**Set Up SACR** > **User Defaults** > **Communication Speed Keys**	Set default values for communication keys for a particular user ID.
User 3C Groups Summary	OPR_GRP_3C_SUM	**Set Up SACR** > **User Defaults** > **User 3C Groups Summary**	Select the type of 3C group access by specifying inquiry or update access for data in 3C groups.

Setting Defaults for Academic Information

Access the User Defaults 1 page (**Set Up SACR** > **User Defaults** > **User Defaults 1**).

This example illustrates the fields and controls on the User Defaults 1 page. You can find definitions for the fields and controls later on this page.

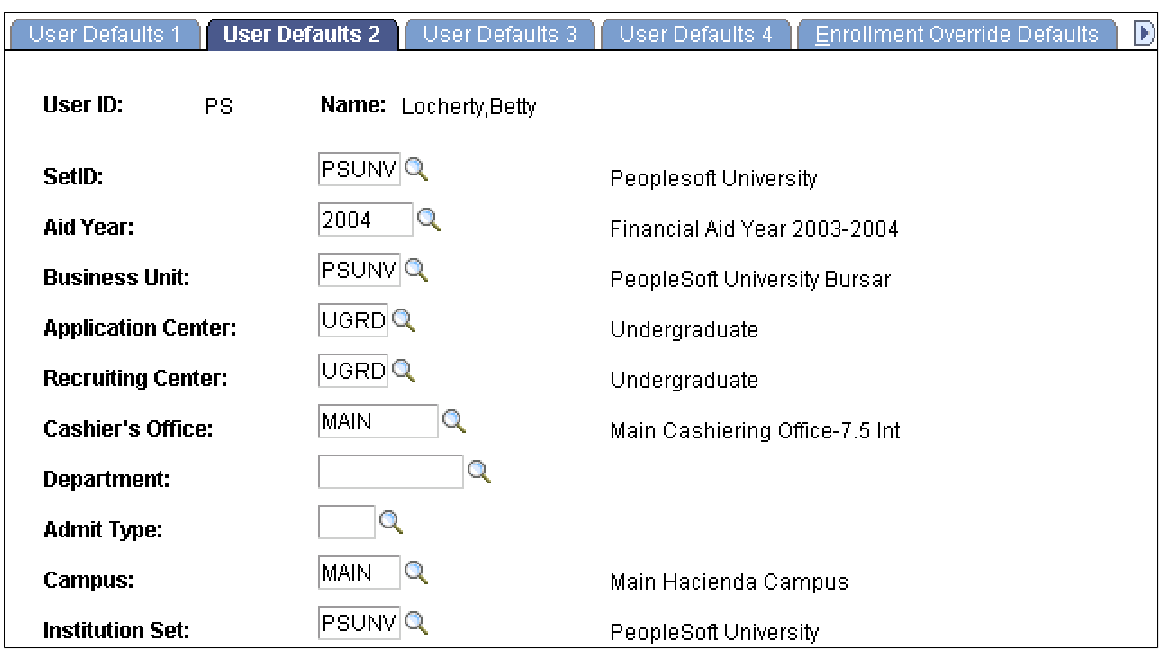


Enter the default values for fields on this page. You can set default values for some fields but not others. All fields are optional.

Setting Defaults for Financial and Admissions Data

Access the User Defaults 2 page (**Set Up SACR** > **User Defaults** > **User Defaults 2**).

This example illustrates the fields and controls on the User Defaults 2 page. You can find definitions for the fields and controls later on this page.

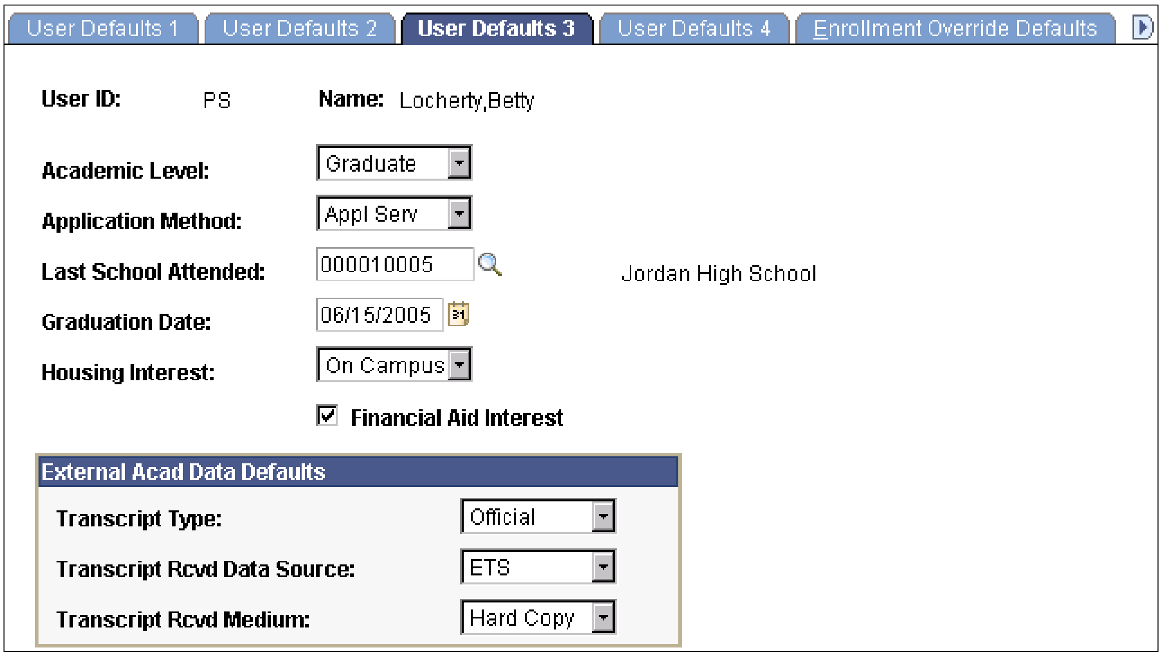


Enter default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

Setting Defaults for Admissions Application Data

Access the User Defaults 3 page (**Set Up SACR** > **User Defaults** > **User Defaults 3**).

This example illustrates the fields and controls on the User Defaults 3 page. You can find definitions for the fields and controls later on this page.



Enter default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

Field or Control	***Description***
Academic Level	Select an academic level for the applicant, such as *Freshman, Junior,* or *Not Set.*
Application Method	Select the medium by which the institution received the student's application, such as *Diskette, Hard Copy,* or *Web Appl* (web application).
Last School Attended	Enter a value in this field if you receive numerous applications from a particular school. The values depend on the options that are set up in the system.
Graduation Date	Enter a value here if many applicants share the same graduation date. No default value is delivered for this field.
Housing Interest	Select *Commuter, Off Campus,* or *On Campus.*

Field or Control	*Description*
Financial Aid Interest	Select to have the Financial Aid Interest indicator set by default in the admissions application information.

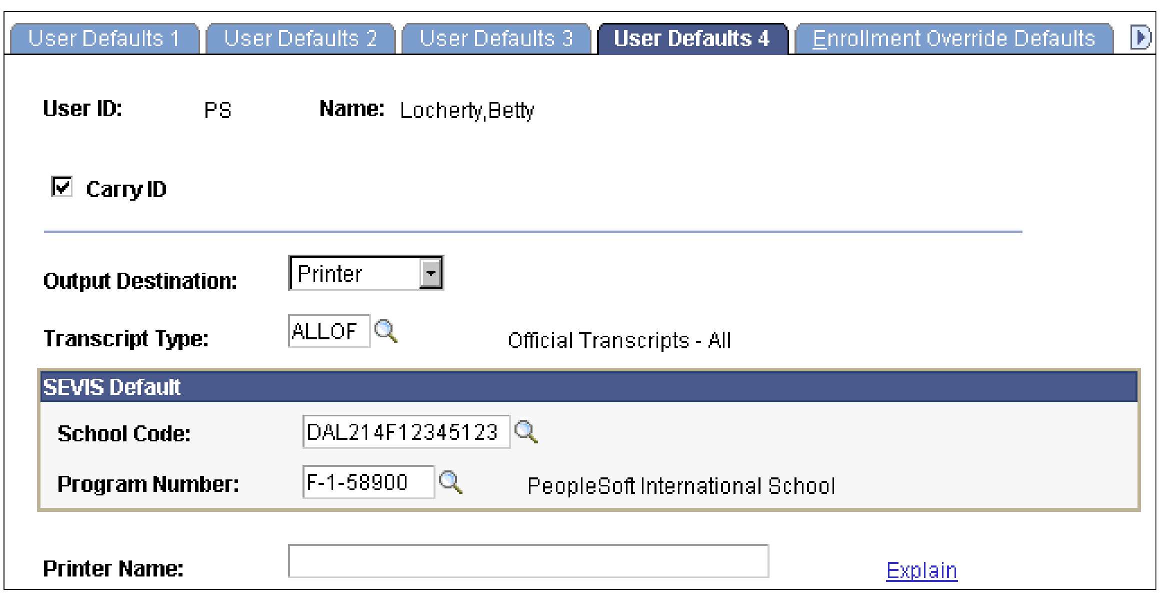
External Acad Data Defaults (external academic data defaults)

Field or Control	*Description*
Transcript Type	Select *Official* or *Unofficial* for this field to indicate if a transcript is official or unofficial.
Transcript Rcvd Data Source (transcript received data source)	Select the data source used to transmit the academic transcript to the institution.
Transcript Rcvd Medium (transcript received medium)	Select *EDI* or *Hard Copy* to indicate the medium by which the transcript is received at the institution.

Setting Defaults for Printing Transcripts, Award Notifications, and SEVIS

Access the User Defaults 4 page (**Set Up SACR** > **User Defaults** > **User Defaults 4**).

This example illustrates the fields and controls on the User Defaults 4 page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Carry ID	Select to have the system carry the ID of the last entered (or selected) individual or organization from search box to search box and from page to page. If you select the **Carry ID** option, you do not have to repeatedly enter or select the ID when you modify or review data for an individual or organization.
Output Destination	Select the default destination for printing transcripts. Select *EDI, Page,* or *Printer.* **Note:** Output destination values are shipped with the system as translate values. Do not modify these translate values in any way. Any modifications of these values require a substantial programming effort.
Transcript Type	Enter the default value for the type of transcripts that you generally print. The options depend on which values are set up in the system.
Printer Name	List the default Postscript printers that you use to print award notifications. Click the**Explain** link for more detailed information.

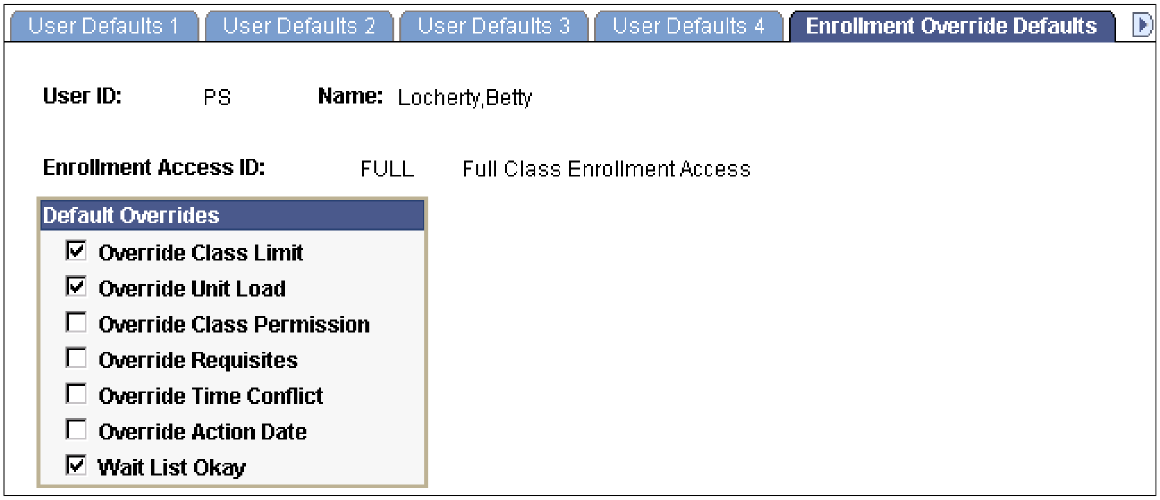
SEVIS Default

Field or Control	*Description*
School Code	Enter the default school code that populates fields in the SEVIS F/M Visa components.
Program Number	Enter the default program sponsor number that populates fields in the SEVIS J Visa components.

Setting Defaults for Enrollment Overrides

Access the Enrollment Override Defaults page (**Set Up SACR > User Defaults > Enrollment Override Defaults**).

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



Select the default overrides for the enrollment access ID shown. Only those overrides to which an enrollment access ID has access can be set as defaults. The overrides selected here are set during the enrollment access ID setup. You can override these settings.

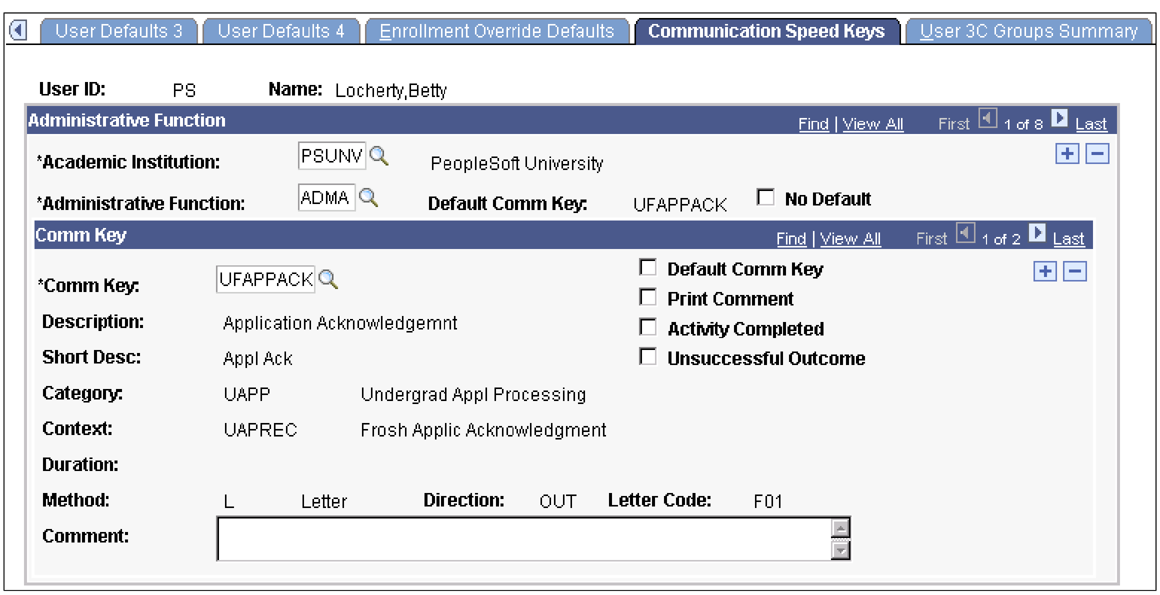
Related Links

Setting Up Enrollment Access IDs

Setting Defaults for Communication Keys

Access the Communication Speed Keys page (**Set Up SACR** > **User Defaults** > **Communication Speed Keys**).

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



Communication speed keys enable you to create shortcuts for specifying common communication data. Users can select from base default communication keys or modify them. Users can also set up their own communication keys in addition to the base communication keys.

Administrative Function

Set default communication keys for multiple administrative functions by adding a row for each administrative function.

Field or Control	***Description***
Academic Institution	Enter the academic institution for the administrative function.
Administrative Function	Enter the administrative function to which the default communication key is assigned.
Default Comm Key (default communication key)	Displays the communication key that you select as the default for the administrative function.
No Default	If you do not want to specify a default communication key for an administrative function, either select this check box or do not select a default communication key in the **Comm Key** (communication key) scroll area. The **Default Comm Key** field remains blank.

Comm Key

You can define only one default communication key for each administrative function. You can set multiple communication keys (or comm keys) by adding rows in the Comm Key scroll area.

Field or Control	***Description***
Comm Key (communication key)	Enter the communication key that you want to use as a default for the administrative function. After you enter a value in this field, the *Category, Context, Method* and other comm key values appear.
Default Comm Key (default communication key)	Select to set this comm key as the default for the administrative function.
Print Comment	Select to have the system set the Print Comment flag to *True* by default for communications using this comm key.
Activity Completed	Select to have the system set Activity Completed flag to *True* by default for communications using this comm key.

Field or Control	Description
Unsuccessful Outcome	Select to have the system set the Unsuccessful Outcome flag to *True* by default for communications using this comm key.

Related Links

"Understanding Communication Management" (Campus Community Fundamentals)

Selecting the Type of 3C Group Access

Access the User 3C Groups Summary page (**Set Up SACR** > **User Defaults** > **User 3C Groups Summary**).

You can see only those items associated with the 3C groups to which you have access, as indicated by the selected check boxes. You can temporarily disable access to specific 3C groups that you do not want to view each time. Clear the **Inquiry Indicator** check box for those groups that you do not want to include in the default. The **Update Indicator** check box appears if the user can enter and edit data in the 3C group. Users cannot change update access on this page.

Related Links

"Setting 3C Engine Security" (Campus Community Fundamentals)

Defining Contributor Relations User Defaults

To set up Contributor Relations user defaults, use the Operator Defaults component (AV_OPR_DEF1).

This section discusses how to:

- Set user defaults.
- Select default columns for the Profile Compare page.
- Specify custom setup for the Bio Bit and Bio Brief reports.

Pages Used to Define Contributor Relations User Defaults

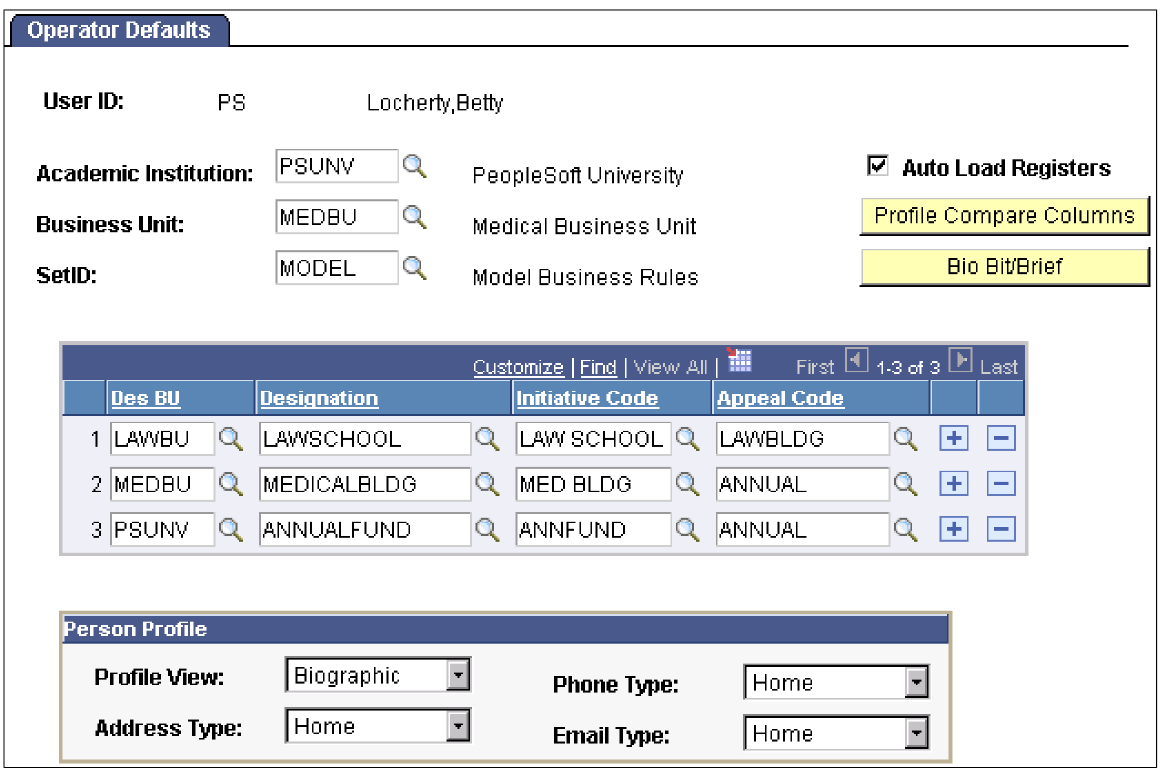
Page Name	Definition Name	Navigation	Usage
Operator Defaults	AV_OPR_DEF1	**Set Up SACR** > **Product Related** > **Contributor Relations** > **Install Contributor Relations** > **Operator Defaults** > **Operator Defaults**	Select default system values based on the user ID.

Page Name	*Definition Name*	*Navigation*	*Usage*
Select Profile Compare Columns	AV_PROF_CMP_DEF_SP	Click the **Profile Compare Columns** button on the Operator Defaults page.	Set up the default columns that appear in the grid on the Profile Compare page.
Custom Bio Bit/Brief Setup	AV_BIO_CUST_SP	Click the **Bio Bit/Brief** button on the Operator Defaults page.	Set up the default items included in customized Bio Bit and Bio Brief reports that you generate. You can create a name for the default report and specify which items are included. The reports that you define here appear as available options in the **Custom** field on the Biographic Profile page.

Setting User Defaults

Access the Operator Defaults page (**Set Up SACR** > **Product Related** > **Contributor Relations** > **Install Contributor Relations** > **Operator Defaults** > **Operator Defaults**).

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



Field or Control	***Description***
Academic Institution	Enter the default academic institution for the current user. This academic institution appears by default on all pages where an institution is required, but it can be overridden. The full name of the academic institution that you enter appears next to this field.
Business Unit	Enter the default business unit for the current user. This business unit appears by default on all pages where a business unit is required, but it can be overridden. The full name of the business unit that you enter appears next to this field.
SetID	Enter the default setID for the current user. This setID appears by default on all entry pages where a setID is required, but it can be overridden. The full name of the setID that you enter appears next to this field.
Auto Load Registers	Select to automatically load data with the defaults that the user selects on this page when you access the Commitment Register and Transaction Register pages.
Profile Compare Columns	Click to set up the default columns that appear in the grid on the Profile Compare page. The Select Profile Compare Columns page appears. You set default columns here, but you can change the columns on a temporary basis on the Profile Compare page as well.
Bio Bit/Brief	Click to set up the default items included in customized Bio Bit and Bio Brief reports that you generate. You can create a name for the default report and specify which items are included. The reports that you define here appear as available options in the **Custom** field on the Biographic Profile pages.
Des BU (designation business unit)	Select the default designation business unit to appear when entering gift or pledge transactions in the system. The designation business unit is the default business unit to which commitments are allocated. These defaults can be overridden on the Session Defaults page within a session and on the entry page.
Designation	Select the default designation to appear when entering gift or pledge transactions in the system. The designation is the default designation to which commitments are allocated. These defaults can be overridden on the Session Defaults page within a session and on the entry page.
Initiative Code	Enter the default initiative code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden on the Session Defaults page within a session.

Field or Control	*Description*
Appeal Code	Enter the default appeal code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden on the Session Defaults page within a session.

Person Profile

The values that you select here determine a user's default views of information on the Person Profile page.

Field or Control	*Description*
Profile View	Select the profile view—*Biographic, Commitment,* or *Participation*—that appears.
Address Type	Select the address type that appears.
Phone Type	Select the phone type that appears.
Email Type	Select the email type that appears.

Selecting Default Columns for the Profile Compare Page

Access the Select Profile Compare Columns page (click the **Profile Compare Columns** button on the Operator Defaults page).

Select the check box next to each field to appear as a default column on the Profile Compare page.

Specifying Custom Setup for the Bio Bit and Bio Brief Reports

Access the Custom Bio Bit/Brief Setup page (click the **Bio Bit/Brief** button on the Operator Defaults page).

Enter the name of the default report, and then select the check box next to each item to include in the report.

Relationship information is broken down by the following selections:

Item	*Included Relationship Types*
Spouse Info. (spouse information)	Spouse
Family Info. (family information)	Brother, Daughter, Father, Grandfather, Other Relation, Son, Step-Father, Sister, Self, and Step Mother

Item	***Included Relationship Types***
Other Relation	Employee, Employer, Friend, Ln Co-Makr, Ln-Refernc, Ln Co-Sign, Neighbor, None Indi, Other, Partner, Roommate, and Works for

Chapter 25

Setting Up Adapters

Understanding Adapters

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

This section provides an overview of adapter types and adapters.

Understanding Adapter Types

The Adapter Type Table component is used to categorize or group adapters by purpose. This data is considered system data and is prefixed with a valid Campus Solutions (CS) owner ID—for example SCC, SSF, SFA— to identify it as CS system data. If you define your own adapter types, you should use your own naming convention to prevent your definitions from being overlaid by the delivery of new features utilizing the adapters. This also applies to the Adapter Table component.

Campus Solutions provides these adapter types:

- SCC_EPAYMENT: ePayment adapters
- SCC_HOSTEDPY: Hosted Payment adapters
- SCC_PMT_APPL: Payment Application adapters
- SSF_SHSECRET: Shared Secret adapters
- SSF_EPMTTRAN: SF ePayment Transactions

The SF ePayment Transactions adapters interact with the SF Payment Transaction Manager to validate and secure the transaction, retrieve the application transaction data, and update the application-specific tables with the results of payment authorization.

Understanding Adapters

The Adapter Table component is used to create a pointer to a specific application class. The application logic uses the Adapter Table definition to determine the application class that should be invoked for a specific processing purpose based on the Adapter ID.

Campus Solutions provides these adapters:

- SSF_AAWS: Adapter Type (SSF_EPMTTRAN) Description (Application Fee Payment Trans). This adapter handles all selects/updates to the Application Staging records during the AAWS fee payment process.
- SSF_BIRTHDATE: Adapter Type (SSF_SHSECRET) Description (Birth Date)

- SCC_BUS_INTERLINK: Adapter Type (SCC_EPAYMENT) Description (Business Interlink Adapter).
- SSF_CASHIERING: Adapter Type (SCC_PMT_APPL) Description (Cashiering Hosted Payment)
- SCC_INT_BROKER: Adapter Type (SCC_EPAYMENT) Description (Integration Broker Adapter).
- SCC_MODEL1A: Adapter Type (SCC_HOSTEDPY) Description (Token-based Integration)
- SCC_MODEL1B: Adapter Type (SCC_HOSTEDPY) Description (Token-based Integration)
- SSF_PIN: Adapter Type (SSF_SHSECRET) Description (PIN)
- SSF_SS_PMT: Adapter Type (SCC_PMT_APPL) Description (Self Service Payments)
- SSF_SS_PMT_FL: Adapter Type (SCC_PMT_APPL) Description (Self Service Payments Fluid)
- SCC_TEST: Adapter Type (SCC_PMT_APPL) Description (Test Payment Application)

Related Links

“Understanding ePayment Processing” (Student Financials)
“Using the SSF_EPAYMENT_TRANS Web Service” (Student Financials)
“Payment Integration Web Service Operations” (Recruiting and Admissions)
“Understanding Admission Transactions” (Recruiting and Admissions)
“Managing Financial Accounts Using PeopleSoft Fluid User Interface” (Campus Self Service)

Setting Up Adapter Types

This section discusses how to set up adapter types.

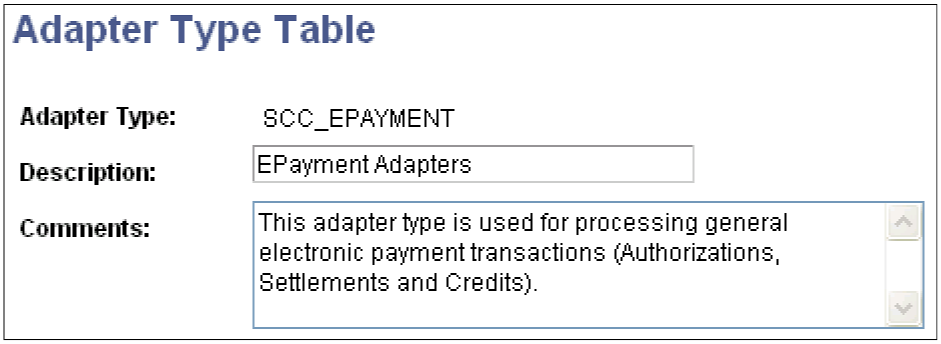
Page Used to Set Up Adapter Types

Page Name	***Definition Name***	***Navigation***	***Usage***
Adapter Type Table	SCC_INTTYPE_TBL	**Set Up SACR** > **System Administration** > **Utilities** > **Adapter Registry** > **Adapter Type Table** > **Adapter Type Table**	Set up adapter types.

Setting Up Adapter Types

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

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



Select SCC_EPAYMENT for electronic payment or SCC_HOSTEDPY for hosted payment.

Select SSF_EPMTTRAN for AAWS application fee processing.

Define additional adapter types as required.

Setting Up Adapters

This section discussesSetting Up Adapters.

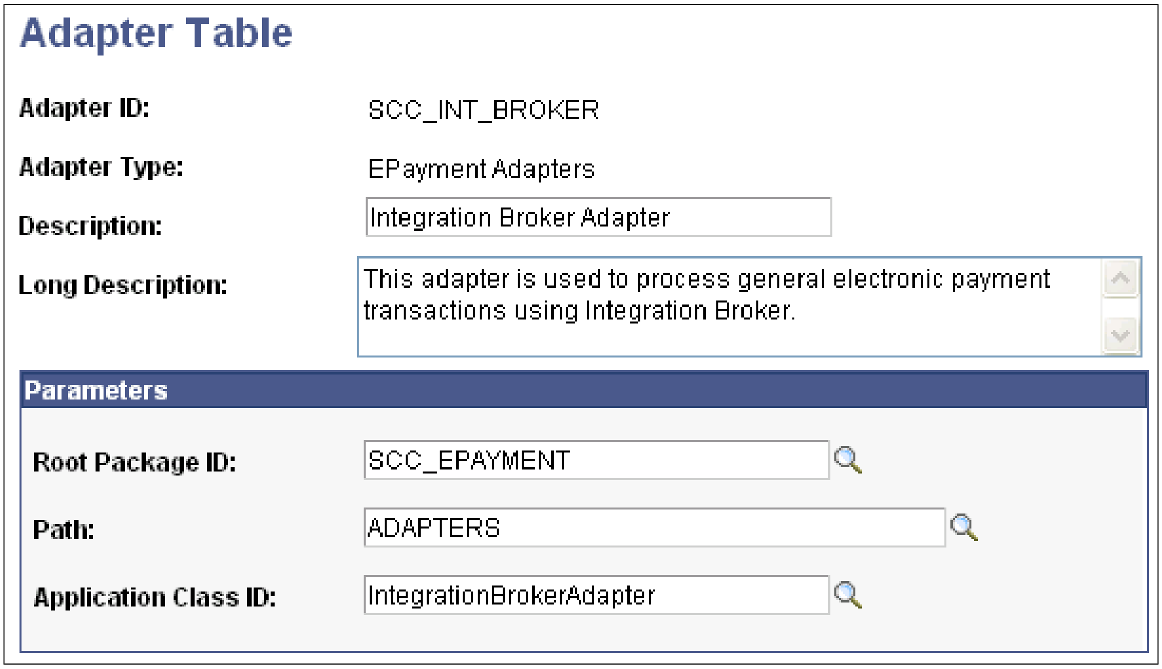
Page Used to Set Up Adapters

Page Name	***Definition Name***	***Navigation***	***Usage***
Adapter Table	SCC_EPAY_INT_REG	**Set Up SACR** > **System Administration** > **Utilities** > **Adapter Registry** > **Adapter Table** > **Adapter Table**	Set up adapters.

Setting Up Adapters

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

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



The **Adapter ID** field identifies the adapter.

Parameters

Field or Control	***Description***
Root Package ID	Select a root Application Class package.
Path	Select a non-root Application Class package.
Application Class ID	Select the Application Class of the adapter.

Chapter 26

Configuring and Working with Notepad and Text Catalog

Understanding Notepad and Text Catalog

For documentation about configuring and working with Notepad and Text Catalog, see "Configuring and Working with Notepad and Text Catalog."

Chapter 27

Working with Interface Registry

Understanding Interface Registry

For documentation about working with Interface Registry, see My Oracle Support (ID 2013381.1).

Chapter 28

Setting Up Equation Engine

Completing Equation Engine Setup

You must set up Equation Engine before using it. This section discusses how to:

- Recompile all equations prior to using Equation Engine.
- Verify equation security objects.
- Adjust equation security.
- Create a tree hierarchy.
- Set up security authorizations.

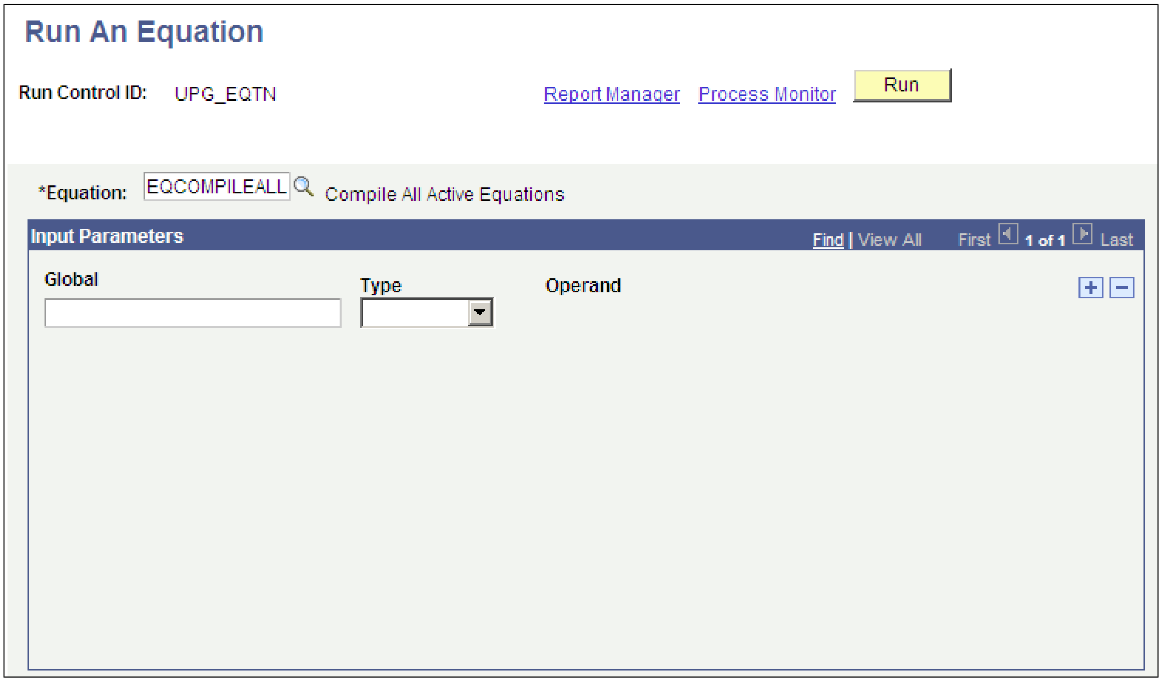
Pages Used to Set Up Equation Engine

Page Name	***Definition Name***	***Navigation***	***Usage***
Run An Equation	SCC_EQTN_RUN_CNTL	**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Run Equation** > **Run An Equation**	Compile all equations prior to using Equation Engine.
User Profile Types	PSOPRALIASTYPE	**PeopleTools** > **Security** > **Security Objects** > **User Profile Types** > **User Profile Types**	Verify equation security objects.
Tree Definitions and Properties	PSTREEDEFN	**Tree Manager** > **Tree Manager** Click the **Tree Definition** link on the Tree Manager page.	Adjusting equation security.
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Create a tree hierarchy.
User Profiles	PSOPRALIAS	**PeopleTools** > **Security** > **User Profiles** > **User Profiles**	Set up security authorizations.

Compiling All Equations Prior To Using Equation Engine

Access the Run An Equation page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Run Equation** > **Run an Equation**).

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



Note: Anyone using Equation Engine in your organization must complete the steps in this section to recompile equations.

To recompile equations:

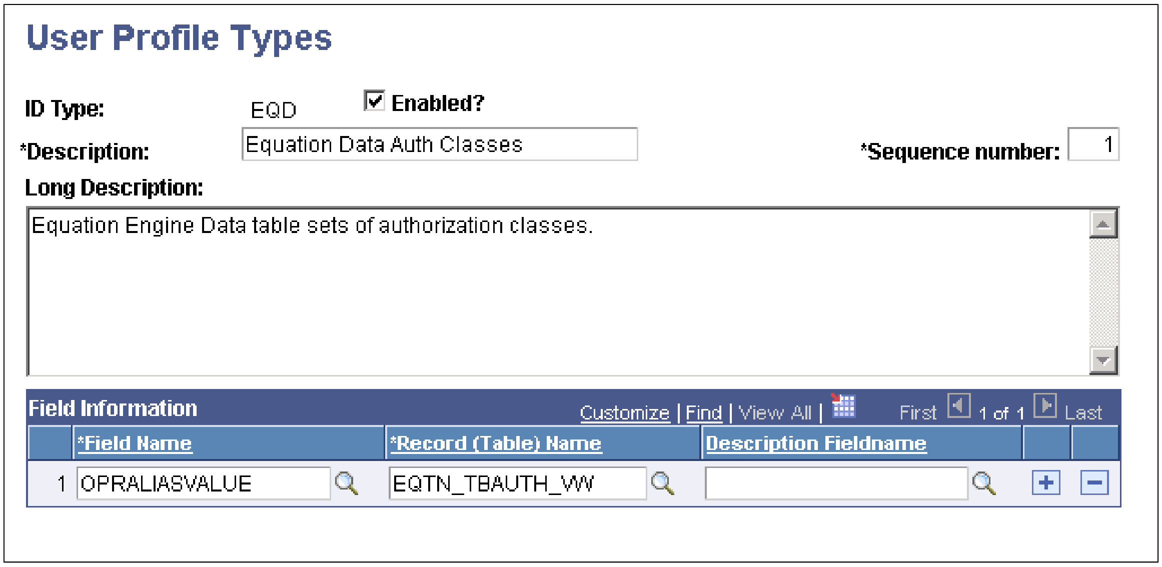
1. Enter the equation EQCOMPILEALL.
2. Leave the **Global** and **Type** fields blank.
3. Click the **Run** button.
4. Click the **OK** button on the Process Scheduler Request page.
5. Verify that the job ran successfully by checking the Process Monitor.

Verifying Equation Security Objects

Access the User Profile Types page for EQD (**PeopleTools** > **Security** > **Security Objects** > **User Profile Types** > **User Profile Types**).

Note: Financial Aid and Student Financials administrators must complete the steps in this section to verify equation security objects.

This example illustrates the fields and controls on the User Profile Types page (EQD). You can find definitions for the fields and controls later on this page.



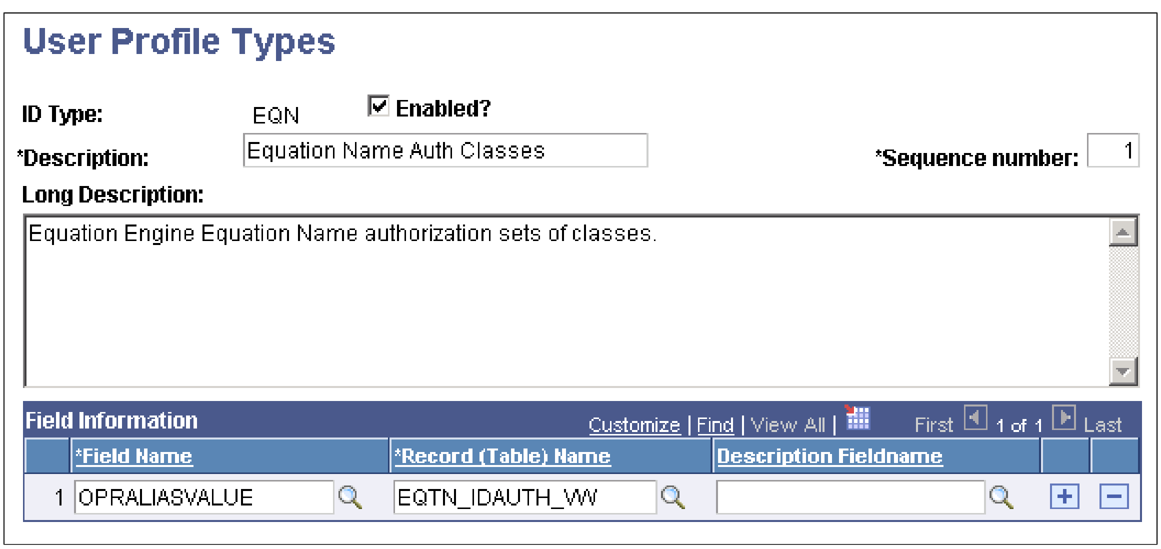
Verify that the information that appears matches the information provided in the preceding page.

Search the following ID types:

- EQN
- EQS
- EQX

Access the User Profile Types page for EQN (**PeopleTools** > **Security** > **Security Objects** > **User Profile Types** > **User Profile Types**).

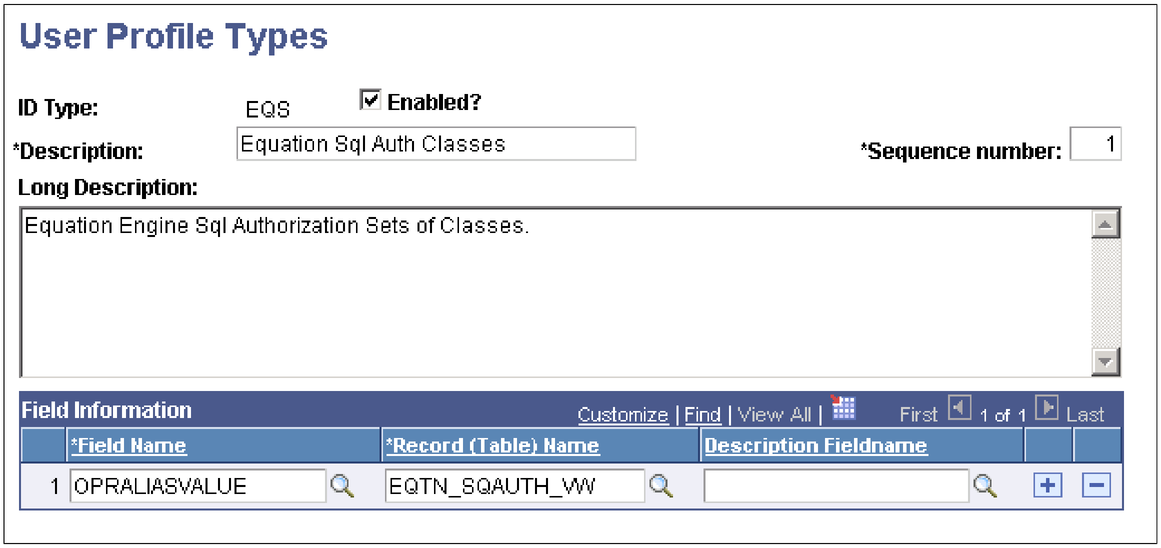
This example illustrates the fields and controls on the User Profile Types page (EQN). You can find definitions for the fields and controls later on this page.



Verify that the information that appears matches the information provided in the preceding page.

Access the User Profile Types page for EQS (**PeopleTools** > **Security** > **Security Objects** > **User Profile Types** > **User Profile Types**).

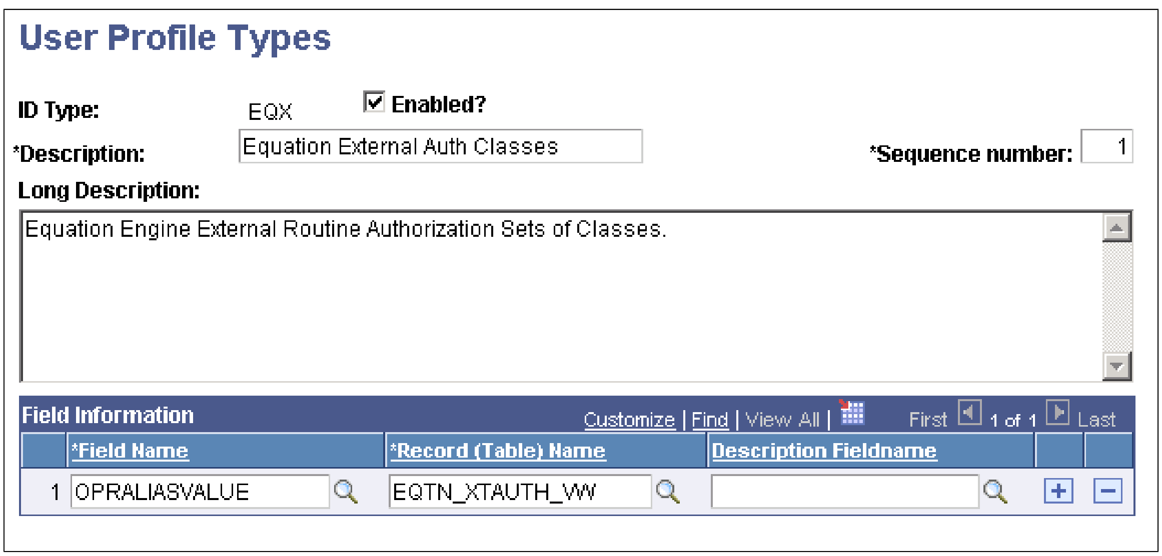
This example illustrates the fields and controls on the User Profile Types page (EQS). You can find definitions for the fields and controls later on this page.



Verify that the information that appears matches the information provided in the preceding page.

Access the User Profile Types page for EQX (**PeopleTools** > **Security** > **Security Objects** > **User Profile Types** > **User Profile Types**).

This example illustrates the fields and controls on the User Profile Types page (EQX). You can find definitions for the fields and controls later on this page.



Verify that the information that appears matches the information provided in the preceding page.

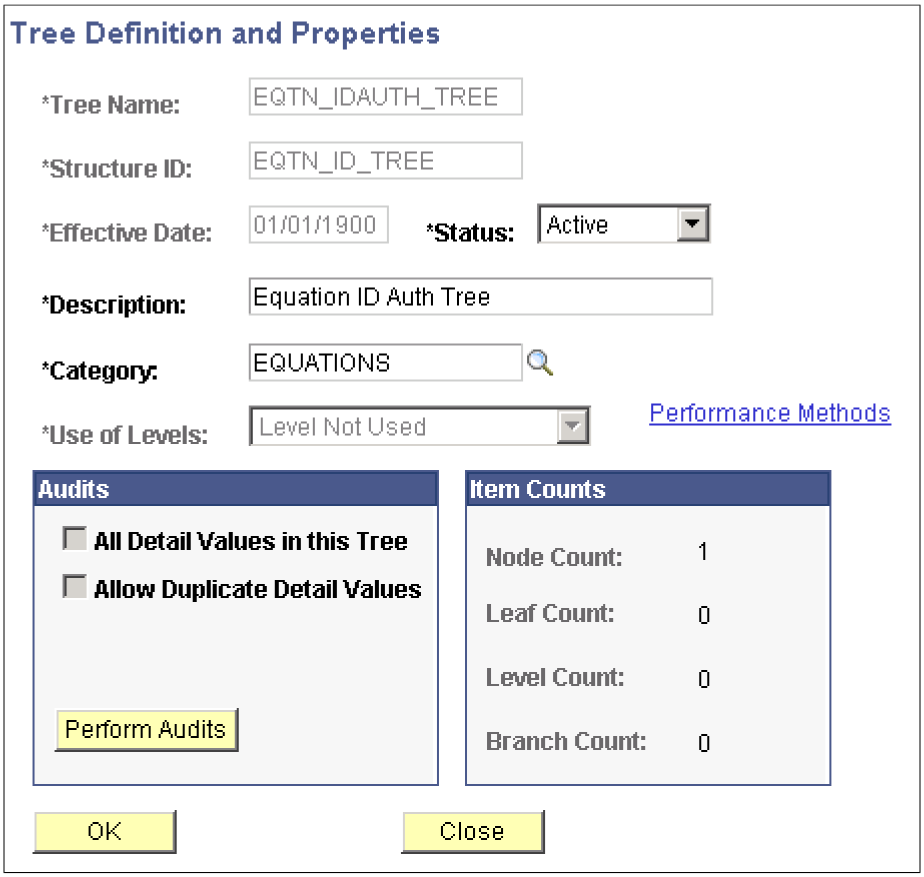
Note: Do not use the EQA ID type at this time.

Adjusting Equation Security

Access the Tree Definitions and Properties page for EQTN_IDAUTH_TREE (**Tree Manager** > **Tree Manager** and click the**Tree Definition** link on the Tree Manager page).

Note: Financial Aid and Student Financials administrators must complete the steps in this section to adjust equation security.

This example illustrates the fields and controls on the Tree Definitions and Properties page (EQTN_IDAUTH_TREE). You can find definitions for the fields and controls later on this page.



Verify that the information that appears matches the information provided in the preceding page.

Search for the following tree names:

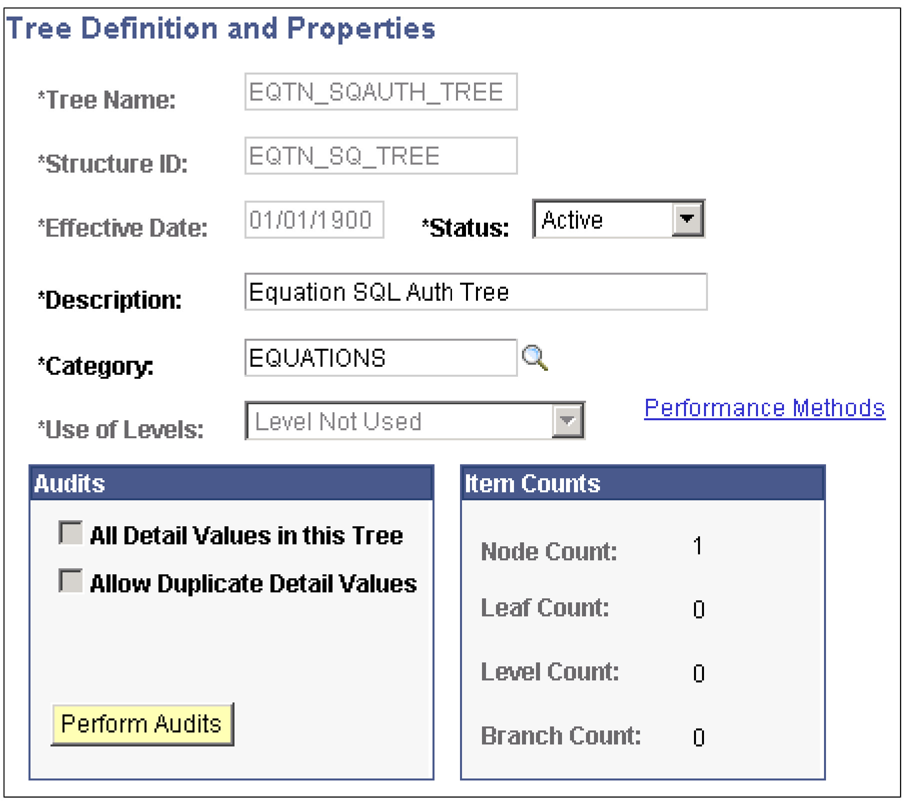
- EQTN_SQAUTH_TREE
- EQTN_TBAUTH_TREE
- EQTN_XAUTH_TREE

If you need to create any of these trees, also use the following page elements :

Field or Control	***Description***
SetID	(blank)
Set control value	(blank)
Tree branch	(blank)
Valid tree	Valid tree.
Tree root node	PUBLIC

Access the Tree Definitions and Properties page for EQTN_SQAUTH_TREE (**Tree Manager** > **Tree Manager** and click the **Tree Definition** link on the Tree Manager page).

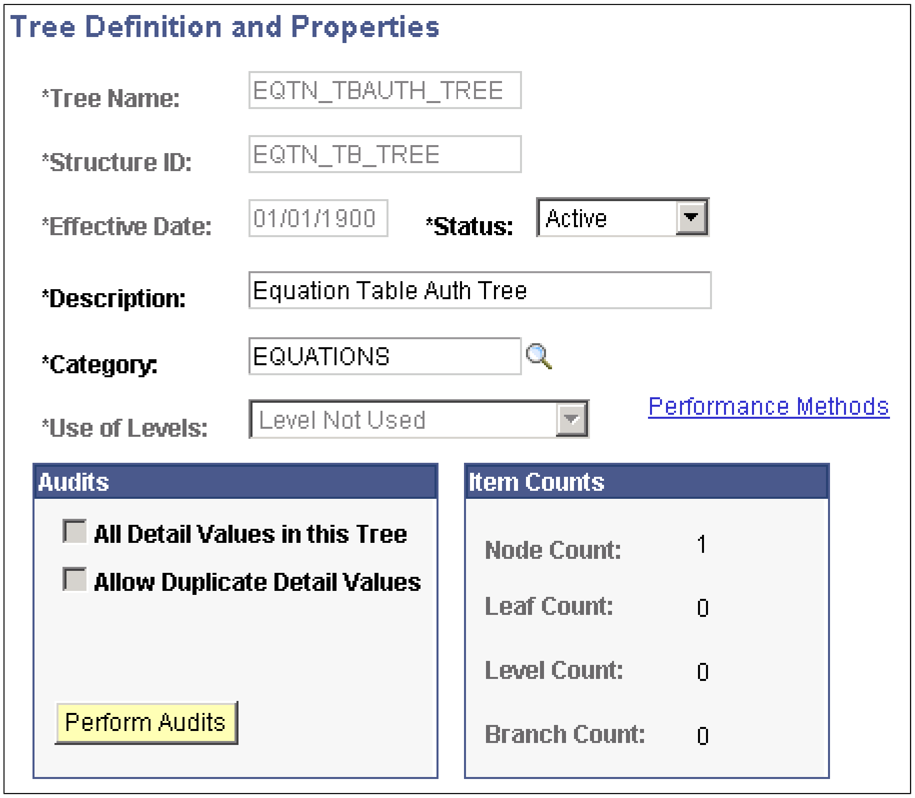
This example illustrates the fields and controls on the Tree Definitions and Properties page (EQTN_SQAUTH_TREE). You can find definitions for the fields and controls later on this page.



Verify that the information that appears matches the information provided in the preceding page.

Access the Tree Definitions and Properties page for EQTN_TBAUTH_TREE (**Tree Manager** > **Tree Manager** and click the **Tree Definition** link on the Tree Manager page).

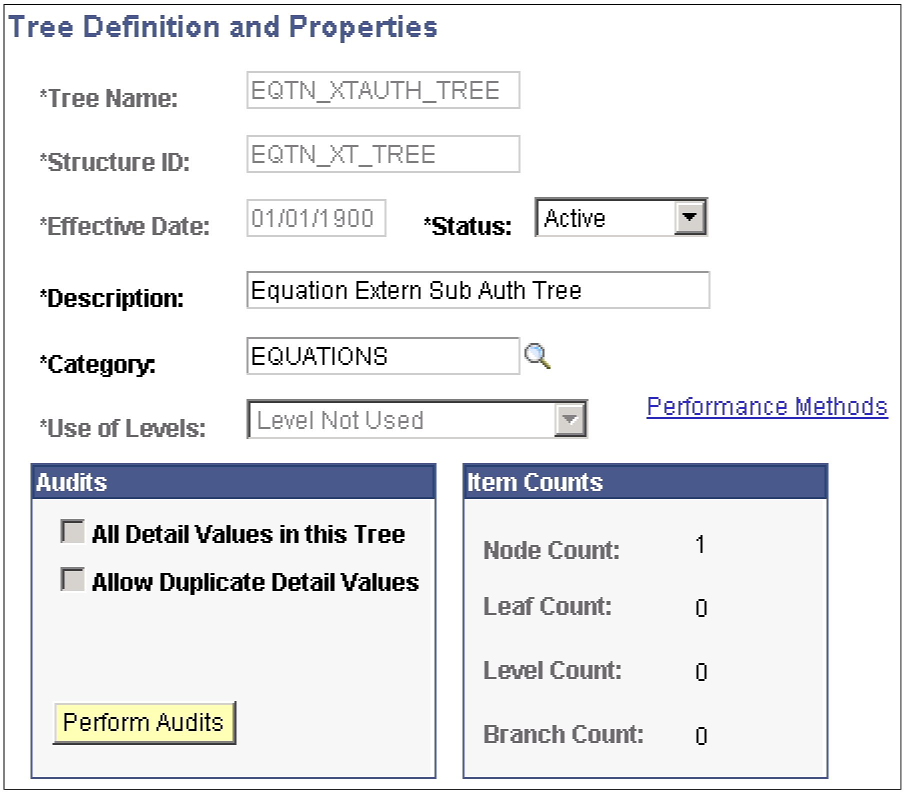
This example illustrates the fields and controls on the Tree Definitions and Properties page (EQTN_TBAUTH_TREE). You can find definitions for the fields and controls later on this page.



Verify that the information that appears matches the information provided in the preceding page.

Access the Tree Definitions and Properties page for EQTN_XTAUTH_TREE (**Tree Manager** > **Tree Manager** and click the **Tree Definition** link on the Tree Manager page).

This example illustrates the fields and controls on the Tree Definitions and Properties page (EQTN_XTAUTH_TREE). You can find definitions for the fields and controls later on this page.

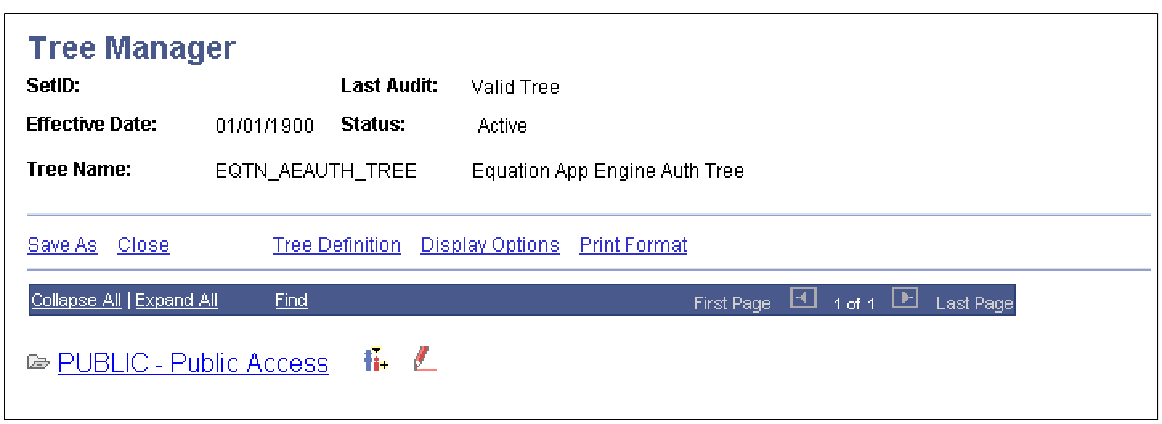


Verify that the information that appears matches the information provided in the preceding page.

Creating a Tree Hierarchy

Access the Tree Manager page (**Tree Manager** > **Tree Manager**).

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



Create a tree hierarchy from the PUBLIC node if one does not already exist for each of the trees. The tree hierarchy should contain a separate node for Financial Aid administrators and a separate node for Student

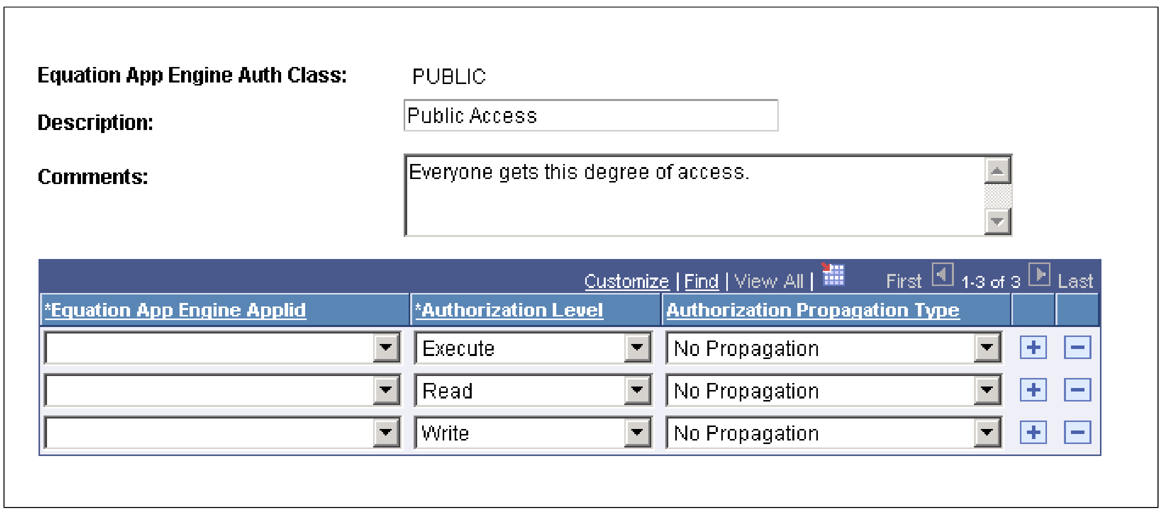
Financials administrators. You can break this down further if you want to limit who can run equations versus who can edit an equation within the groups.

Tree Name	***Description***
EQTN_IDAUTH_TREE	Authorizations for editing, viewing, or running equations.
EQTN_SQAUTH_TREE	Authorizations for editing or running equation SQL.
EQTN_TBAUTH_TREE	Authorizations for reading tables and view from an equation.
EQTN_XTAUTH_TREE	Authorizations for running external COBOL routines from an equation.

Note: Do not use EQTN_AEAUTH_TREE at this time.

Access the Edit Data page (click the Edit Data icon on the Tree Manager page).

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



Under each node, add or edit the list of objects and indicate what level of security should be applied to the node.

To do this, click the *Edit Data* icon (pencil icon) and then insert rows of equation object names and grant appropriate authorization levels.

Field or Control	***Description***
Execute	Select the *Execute* value if the user has the security clearance only to run equations.

Field or Control	Description
Read	Select the *Read* value if the user has the security clearance to read and run equations.
Write	Select the *Write* value if the user has the security to write, read, and run equations.

All tables and views should have only *Read* access at this time. Equations should have a mix of authorizations depending on the position of the person accessing them. External routines and SQL should have only *Execute* access.

Note: You should create the node hierarchy and save the tree structure before adding equation object names so that authority propagation can take place.

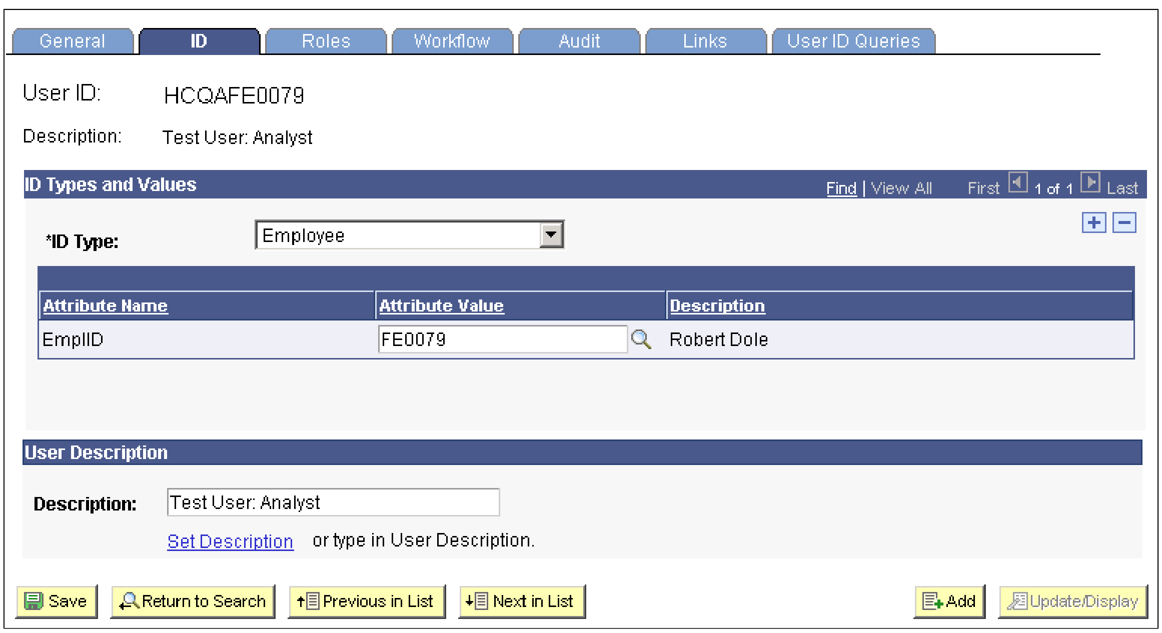
Objects newly placed within the PUBLIC node should have their access propagated to *Append Auth to All Child Nodes.*

Save any changes you made to the trees.

Setting Up Security Authorizations

Access the User Profiles page (**PeopleTools** > **Security** > **User Profiles** > **User Profiles**).

This example illustrates the fields and controls on the User Profiles page: ID tab. You can find definitions for the fields and controls later on this page.



For each person in a department who needs security authorization other than PUBLIC, you must follow these steps:

1. Enter the person's ID number and access the ID tab.

2. Enter each of the four EQ ID types in the **ID Type** and **Values** fields.

3. Enter the appropriate Equation Security Tree node name for each of these ID types.

4. Save the user profile.

See *PeopleTools: Security Administration*

Review and Test the Units of Converted Equations

You should test any equation converted to Equation Engine from Equation Processor. This section discusses how to:

- Verify compiled equations.
- Define equation test data.

Note: Financial Aid administrators and Student Financials administrators must complete the steps in this section.

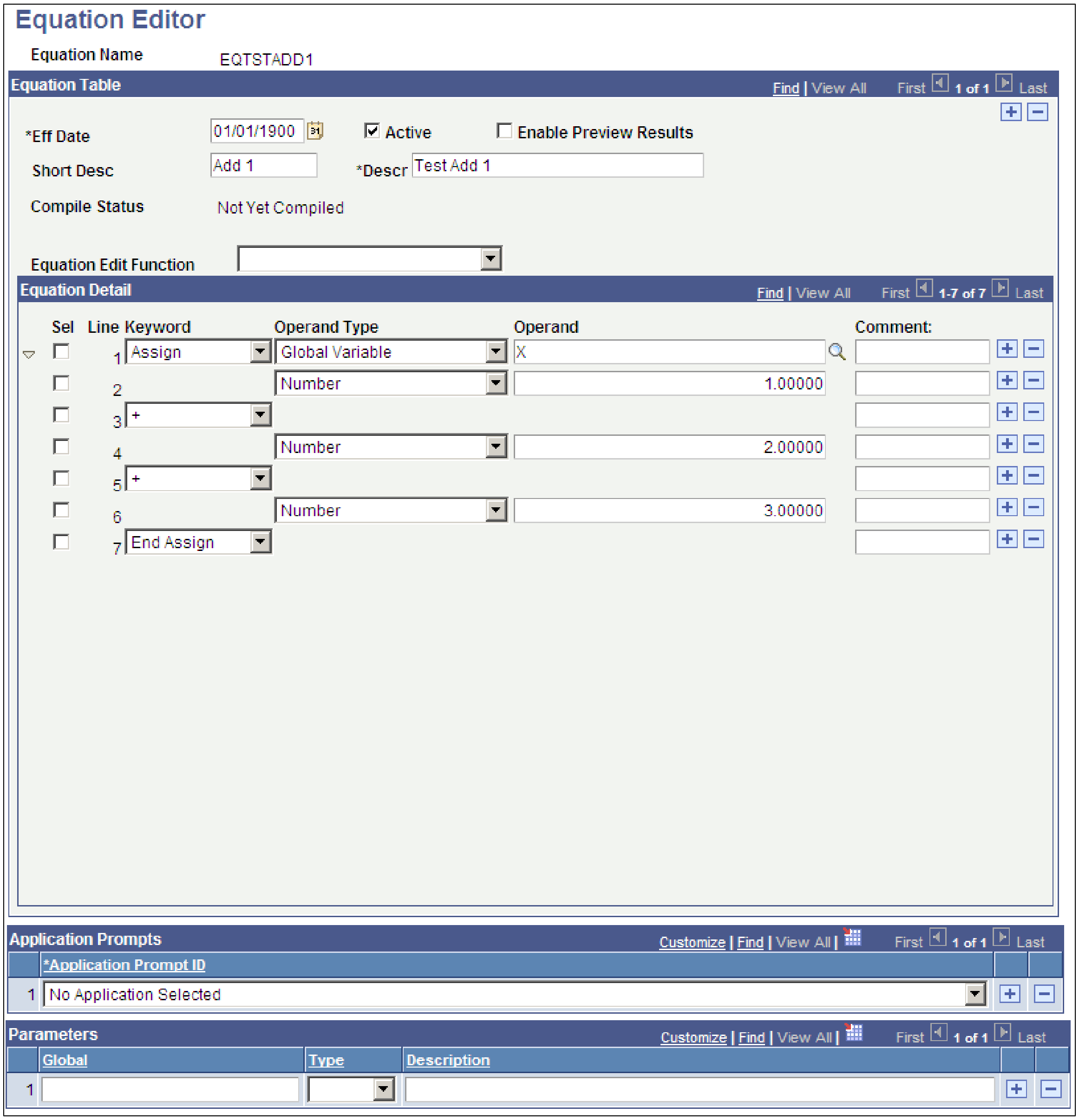
Pages Used to Review and Test Units of Converted Equations

Page Name	***Definition Name***	***Navigation***	***Usage***
Equation Editor	EQUATION_EDITOR	**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Editor**	Verify compiled equations.
Equation Test Data	EQTN_TEST_DATA	**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Test Data**	Define equation test data.

Verifying Compiled Equations

Access the Equation Editor page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Editor**).

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



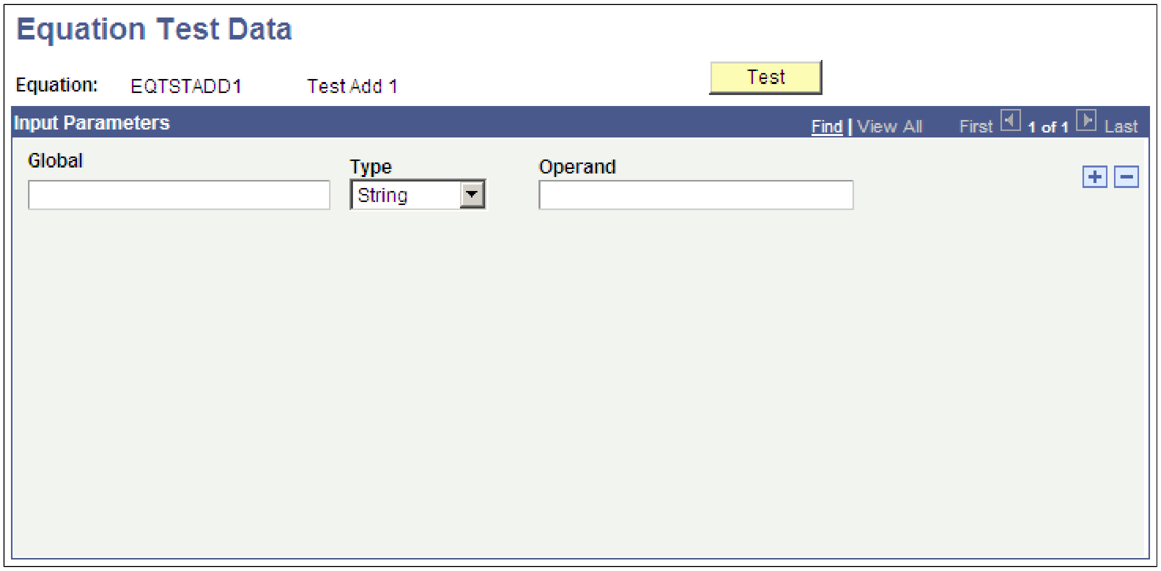
Each administrator must review the equation names that he or she entered in the equation conversion setup tables prior to the upgrade.

For each equation, verify that it is compiled. If the equation is not compiled, you must edit it and compile it.

Defining Equation Test Data

Access the Equation Test Data page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Test Data**).

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



You can enter test data on this page. After the test data is entered, access the Equation Editor page and click the **Test** button.

Check the messages that the system provides to verify correct results of the equation test. If test data is missing, the message will identify what is missing.

Financial Aid administrators should carefully review any equations that reference the view FAN_AWD_PER_VW. Specifically, verify whether an AWARD_PERIOD of *B* (both) is being handled properly. If you want the system to use just the academic award period, you must decide whether you want it used as the first available award period (even if it is the nonstandard award period), or whether you want the system to return a total or maximum of a field. PeopleSoft Campus Solutions provides an alternate view called SFA_PKAWDPER_VW that you can use to return a total or maximum for an award period value of *B* (both) in addition to existing academic and nonstandard award period rows.

Related Links

Understanding Equation Engine

Chapter 29

Working with Equation Engine

Understanding Equations

An equation is a defined series of statements that can calculate amounts or check criteria. In general, an equation is most often used to return one of the following items:

1. A True or False result. This is an equation that checks to determine whether certain criteria are met.
2. An amount. This is a calculation equation that results in a numeric value.

Equations can:

- Use algebraic statements.
- Use Boolean conditional statements.
- Look up information in tables.
- Update information in tables.
- Branch or link to another equation.

Preparing to Write Equations

This section discusses how to prepare to write equations.

Before you write an equation, decide what information you want the equation to provide. You must know which fields exist in which tables to use an equation. For example, to determine whether all new transfer students who are receiving an FFELP loan have completed the required interview, you must know that a field exists to track the completion of the interview and in which table it is stored.

If you want the equation to select a population of students for a process, define the criteria exactly as well as the steps to make in selecting those students. If you want the equation to provide you with a calculated value such as an award maximum, determine where the value comes from and how it is calculated.

These criteria must be met to write an equation:

1. A table or view must exist to be named in an equation.
2. You must have security access to the table or view.
3. Table security must be turned on for you to access the table or view.
4. Any table or view that you access must not have a long VAR_CHAR field in it.

Using Equation Keywords

You must write equations using keywords and operands. A keyword is an instruction for the equation to perform. Equation keywords include:

Field or Control	*Description*
ASSIGN	Assigns a value to a global or local variable in an equation.
CALL	Calls a subequation or an external routine or an SQL statement. When you CALL something, control returns to the statement after the CALL when the called item finishes. For a subequation, control might not return if that subequation issues a HALT statement. Calls to subequations pass parameters through local and global variables and pass values back through global variables. An equation can call itself. Calls to external routines pass parameters back and forth using global variables. Calls to SQL pass parameters back and forth as well and can be used to get an array of data or update relational tables.
CHOOSE	Can be used with the keywords INSERT, UPDATE; or DELETE, INSERT, UPDATE and DELETE. Use a WHERE clause to select a rowset. If the CHOOSE returns a global variable with the same name or the global variable A-SELECT with a value of TRUE, then that row will remain in the rowset. That is, the CHOOSE equation can be used to further limit the rows deleted.
EXIST	Tests for the existence of a local variable, a global variable, or a table. It returns numeric zero for false and numeric 1 for true. It yields false for a local or global variable that has not been assigned or a table with zero rows selected from a find.
FIND FIRST	Finds the first row in the specified table using the specified key values with relational operators (Equal or Greater-or-Equal) comparing these to either local or global variables. FIND NEXT does not have any key value parameters, but it finds the next row relating to the previously issued FIND FIRST. If a FIND is successful, then references to the table and fields for that FIND are valid and return the corresponding field values.
FIND NEXT	Points to the next occurrence of the row of fields in a FIND table You can set up the equation so that failure to find an occurrence can be handled, for example, by the equation returning to the calling equation or program.

Field or Control	***Description***
IF	Indicates a conditional statement that must be followed by a THEN keyword and can contain an ELSE or an ELSE IF keyword. It must be terminated by the keyword END IF. It compares one operand against another operand.
LOOP	Causes the equation to repeat the statements between the LOOP and the END LOOP statement in a loop until an EXIT LOOP statement is encountered within that loop, usually within an IF statement.
MESSAGE	Writes a message to the log.
SKIP	Used to make a progam more readable. It enables you to break up the program statements, and it can simplify your IF logic.
TRACE	Writes debugging statements to the log and is used for problem resolution.

See Understanding Equation Engine.

Using Operand Types

Equations employ operand types that identify the type of information contained in the operand that follows it. Type choices differ depending on where the operand type is located in the equation. Options include:

Field or Control	***Description***
Table	Table or view name.
Value	Valid values for a field.
SQL	This operand applies only to the CALL statement.
Global	User-defined global variable.
Local	User-defined local variable.

See Understanding Equation Engine.

Using Operators

Equations use operands and operators. Operands are based on the previous type. Operators are entered in the keyword column and can be:

Field or Control	***Description***
Arithmetic	(+, —, *, /) Add, Minus or Subtract, Multiply, Divide Arithmetic operators apply to two expressions and provide an arithmetic result. You can use parentheses to group expressions or to make the equation more readable.
Boolean	(AND, OR, NOT) These are logical operators. You use them within an IF statement. AND is used between two conditions. It indicates that both statements must be met for the selection to be made. For example, A and B must be true for a selection. OR is used between two conditions. It indicates that only one of the statements must be met for selection to be made. For example, A OR B can be true for a selection. NOT is used in conjunction with a condition to show that the condition does not exist. For example, NOT <condition>.
Relational	(=, <, <=, >, >=, < >) Equal, Less than, Less than or equal, Greater than, Greater than or equal, Less than or Greater than (for example, not equal). Relational operators compare two expressions and provide a truth value. You can use parentheses to group expressions or to enhance readability.

See Understanding Equation Engine.

Using Variables

Two types of variables are available in the equation engine—local and global. The data is passed to the equation engine by means of the global variable array in a process instance of a copy of the global variables that is defined by the Equation Test Data page or by a calling program. Global variables are visible and are referenced by an equation that is running or called. Local variables are visible only to the currently running equation, but copies of local variables can be passed to called subequations as parameters.

See Understanding Equation Engine.

Naming Equations

This sections discusses how to name equations.

When you write a new equation, you must give it a name that follows strict naming guidelines. Your IT department will help you establish rules for equations within the institution. Do not use a naming convention that begins with the letters of a PeopleSoft product name or subproduct name. For example, do not use AA (academic advisement), AD (admissions), CC (campus community), CS (campus solutions), FA (financial aid), HR (human resources), SF (student financials), or SR (student records). Each department in the institution should have its own equation name prefix as well to avoid naming conflicts.

Note: You must not modify any system-specific equations because compromising those equations will cause negative processing ramifications for the specific feature.

Related Links

Reviewing Delivered Equations

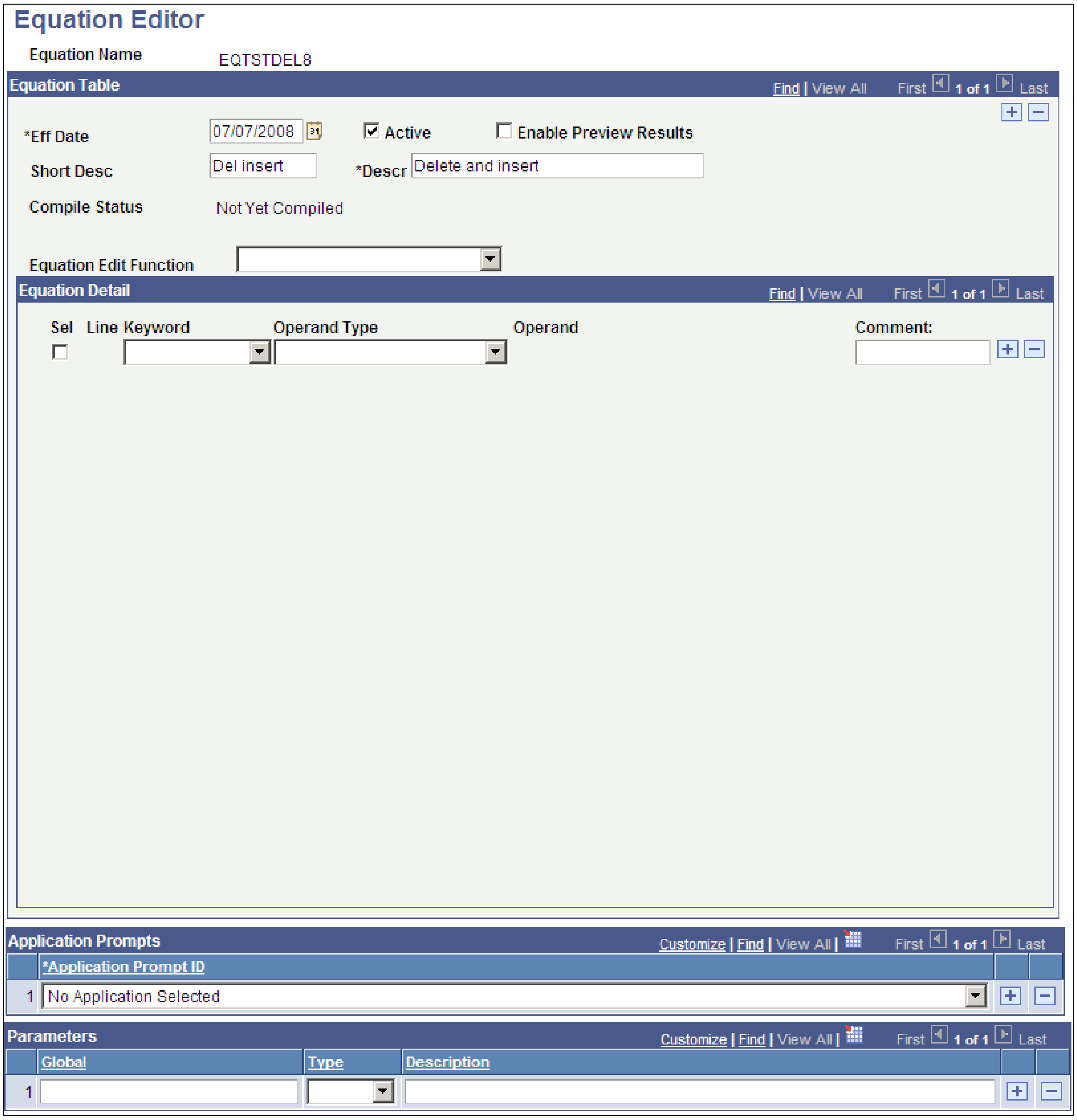
Page Used to Name Equations

Page Name	***Definition Name***	***Navigation***	***Usage***
Equation Editor	EQUATION_EDITOR	**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Editor**	Name an equation.

Naming an Equation

Access the Equation Editor page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Editor**).

This example illustrates the fields and controls on the Equation Editor (EQTSTDEL8) page. You can find definitions for the fields and controls later on this page.



Create an equation name based on established naming conventions for your organization.

Using Views and Tables in Equations

This section discusses how to use views and tables in equations.

A view consists of information drawn from a table or multiple tables and can be accessed by an equation. Use a view whenever it can make the equation logic simpler. You should use a view only to access information contained in core tables.

Note: If you need to access information contained in a core table or a very large table, ask your organization's IT department to create a view of that table and add the view to the Equation Table Authorization Security Tree.

Defining an Equation

This section provides an overview of application prompts, lists a prerequisite, and discusses how to define equations and application prompts.

Understanding Application Prompts

If you are working on a particular feature, such as a packaging plan, and need to create one or more equations for that plan, you must define those equations here and include a short description and long description for the new equation.

You must then associate that equation with an application prompt. For example, the equation that you are creating is a packaging selection equation. Because this equation will be used to access a population of students—that is, it is a selection equation—you must assign the *Fin Aid Packaging Enter Eqtn* application prompt to the equation. You do that by selecting *Fin Aid Packaging Select Eqtn* from the drop-down list box. By associating the application prompt value with an equation here, this equation will appear in the list of available selection equations that you can use when creating your packaging plan in the Packaging Plan Setup table.

As another example, if you are working on a Student Financials tuition calculation feature, and you want to create an equation that will return an amount, you must associate your new equation with an application prompt. You would select *Stdnt Fin Tuition Amount Eqtns* or *Stdn Fin Tuit Amount Limited.* After selecting one of these application prompts here, your new equation will appear on the list of possible equations to use when working with the tuition calculation setup feature.

Warning! Do not make any changes to the Application Prompt values.

The application prompts *Stdnt Fin Tuit Select Limited* and *Stdnt Fin Tuit Amount Limited* are used by equations that use only global variables from the STDNT_CAR_TERM record. Both prompts eliminate the need to repeatedly call the Equation Engine.

This table lists the application prompt to use based on the global variable:

Student Financials Global Variables	***Stdnt Fin Tuition Amount Eqtns***	***Stdnt Fin Tuition Select Eqtns***	***Stdnt Fin Tuition Amount Limited***	***Stdnt Fin Tuit Select Limited***
INSTITUTION	X	X	X	X
BUSINESS UNIT	X	X	X	X
ACAD_CAREER (academic career)	X	X	X	X

Student Financials Global Variables	***Stdnt Fin Tuition Amount Eqtns***	***Stdnt Fin Tuition Select Eqtns***	***Stdnt Fin Tuition Amount Limited***	***Stdnt Fin Tuit Select Limited***
STRM (term)	X	X	X	X
EMPLID	X	X	X	X
STDNT_CAR_NBR (student career number)	X	X	X	X
BILLING_CAREER	X	X	X	X
A_AMOUNT	X	X	X	X
A_SELECT (yes/no check box)	X	X	X	X
SESSION_CODE	X	X	NA	NA
CLASS_NBR (class number)	X	X	NA	NA
CRSE_ID (course ID)	X	X	NA	NA
TRANS_DATE (enrl_ drop_dt)	X	X	NA	NA
ENRL_ACTN_RSN_ LAST (enrolment action reason last)	X	X	NA	NA
TRANS_TIME (last drop term stamp)	X	X	NA	NA

Note: NA = Not Applicable

Prerequisite

Before you define an equation on the Equation Editor page, you should devise a flow chart that considers what your end result should be. Using a flow chart will help you develop proper equation syntax.

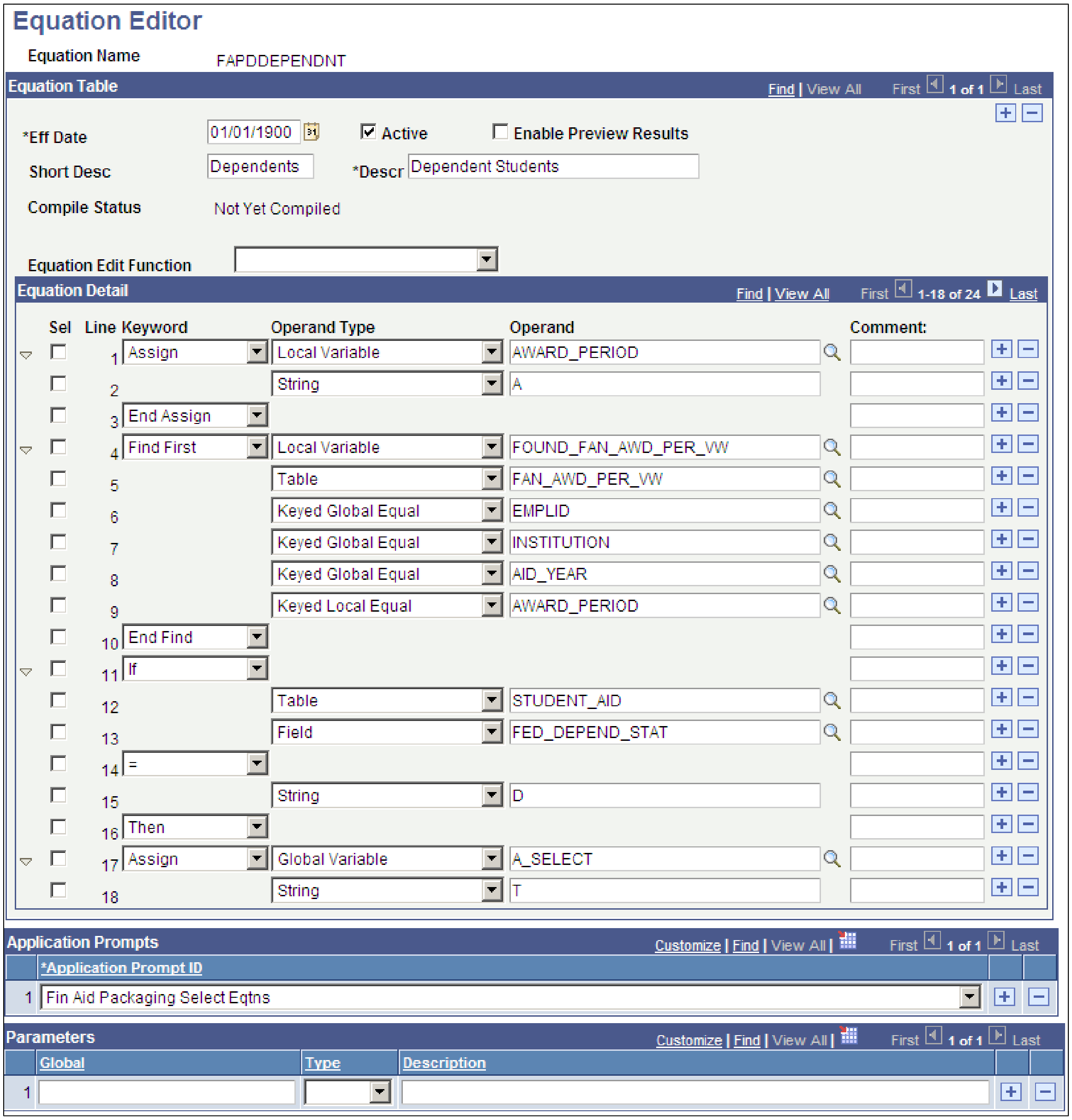
Page Used to Define an Equation

Page Name	*Definition Name*	*Navigation*	*Usage*
Equation Editor	EQUATION_EDITOR	**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Editor**	Define an equation and application prompts.

Defining Equations and Application Prompts

Access the Equation Editor page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Editor**).

This example illustrates the fields and controls on the Equation Editor (FAPDDEPENDNT) page. You can find definitions for the fields and controls later on this page.



Equation Table

Field or Control	*Description*
Eff Date(effective date)	Enter a date after which the equation will be effective.
Active	This check box is selected when an equation is available for use.

Field or Control	*Description*
Enable Preview Results	Select to preview results based on the parameters that you selected before you run the process. This check box can be selected on the Selection Tool page and is associated with the Pop Select feature.
Short Desc(short description)	Enter a short description for the equation based on the equation naming guidelines.
Descr(description)	Enter a description for this equation.
Equation Edit Function	Select an equation edit function value. This drop-down list box contains a selection of predefined edit functions to assist with tasks such as cutting and pasting, compiling, and printing an equation.

Equation Detail

Field or Control	*Description*
Keyword	Select equation keywords that are necessary for your equation.
Operand Type	Select an operand type from the available options. This operand identifies the type of information contained in the operand that follows.
Operand	Enter the operand based on the operand type selected in the previous field.
Comment	Enter a short comment. This is not part of the equation.

Application Prompts

Field or Control	***Description***
Application Prompt ID	Select an application prompt value. These prompt values control which equations will be available for you to choose from when defining equations for a particular feature. If you do not select an application prompt value for an equation here, that equation will not appear on the list of available equations for selection during feature processing. Prompt values include: *FA Budget Item Amount* *FA Budget Item Code* *Fin Aid Loan Edits for CL4* *Fin Aid Loan Edits for CRC* *Fin Aid Packaging Amount Eqtns* *Fin Aid Packaging Select Eqtns* *Stdnt Fin Tuition Amount Eqtns* *Stdnt Fin Tuition Selct Eqtns* *Stdnt Fin Tuit Select Limited* *Stdnt Fin Tuit Amount Limited*

Parameters

Field or Control	***Description***
Global	Enter a global variable value.
Type	Select an operand type from the available options. The operand type identifies the type of information contained in the operand that follows.

Testing Equations

This section discusses how to:

- Define equation test data.

- View equation test run details.

To test the equation, you may need to set up test data. In an equation for which the sole function is to add a few numbers together, no test data is needed because all the data elements are provided. However, to test an equation that references keys in the table or passes global variables, the equation must have test data present.

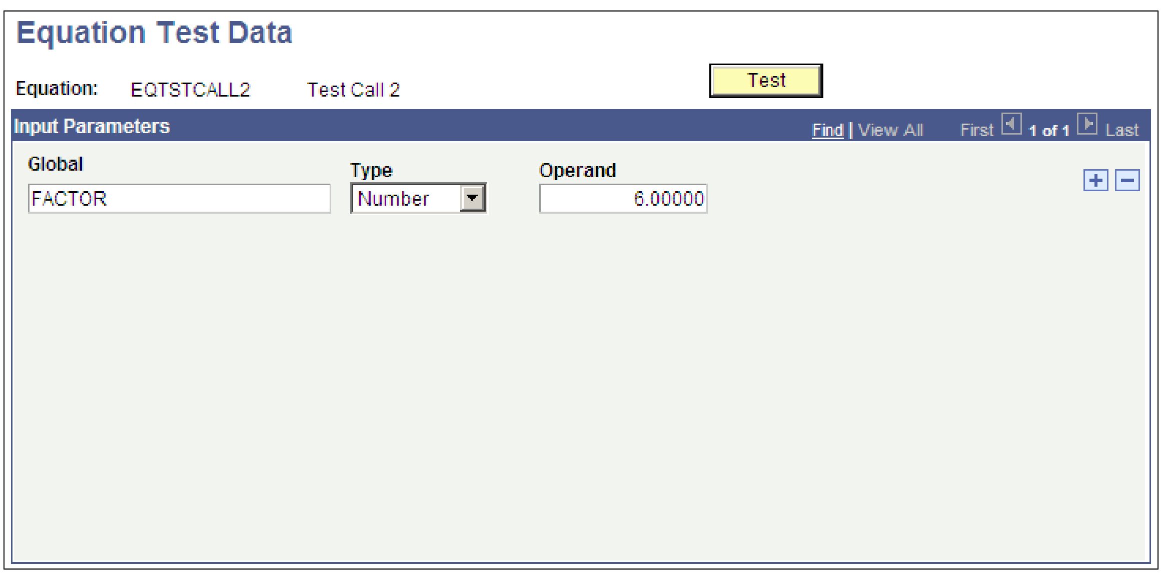
Pages Used to Test Equations

Page Name	***Definition Name***	***Navigation***	***Usage***
Equation Test Data	EQTN_TEST_DATA	**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Test Data** > **Equation Test Data**	Define equation test data.
Equation Test Results - Process Messages	EQTN_PRCS_MSGS	Click the **Test** button on the Equation Test Data page.	View the equation test run details.

Defining Equation Test Data

Access the Equation Test Data page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Test Data**).

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



Use this page to define the name of the global variable, type, and operand.

After you have defined all the necessary variables and entered data on the Equation Test Data page, click the **Test** button.

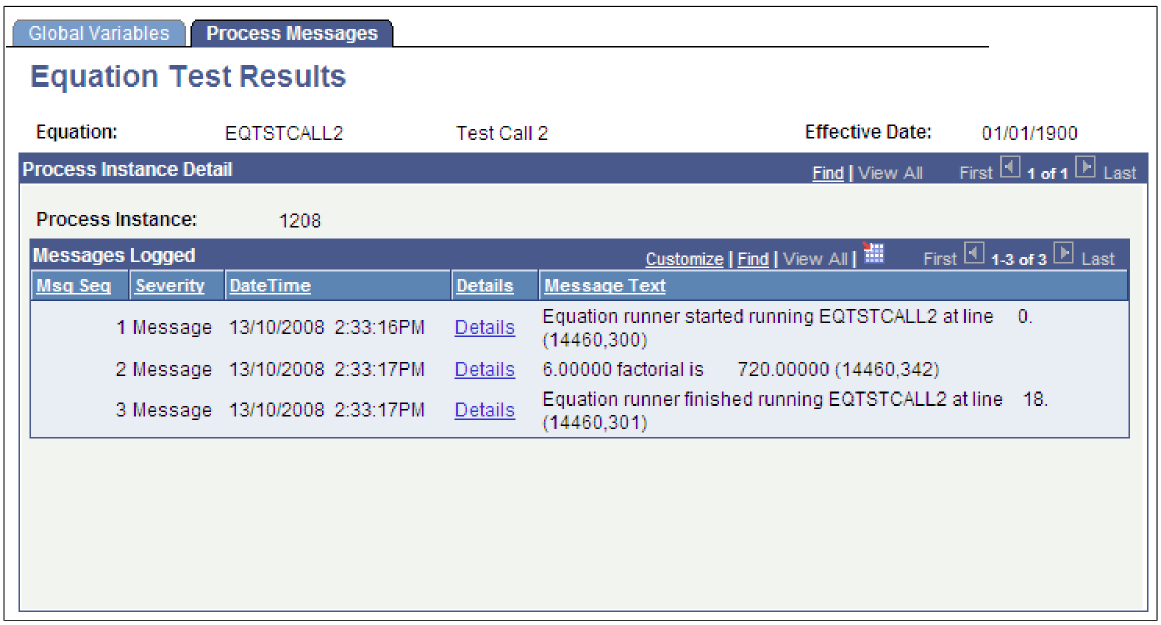
The system displays the Equation Test Results - Process Messages page.

Note: You can also run this process as a batch process rather than initiating it by the **Test** button. To test the equation in batch, select the **Run Equation** option **(Set Up SACR > Common Definitions > Equation Engine > Run Equation > Run an Equation).**
You can also print the equation that has been established in batch by selecting the **Print Equation** option **(Set Up SACR > Common Definitions > Equation Engine > Print Equations > Print an Equation).**

Viewing Equation Test Run Details

Access the Equation Test Results page: Process Messages tab (click the **Test** button on the Equation Test Data page).

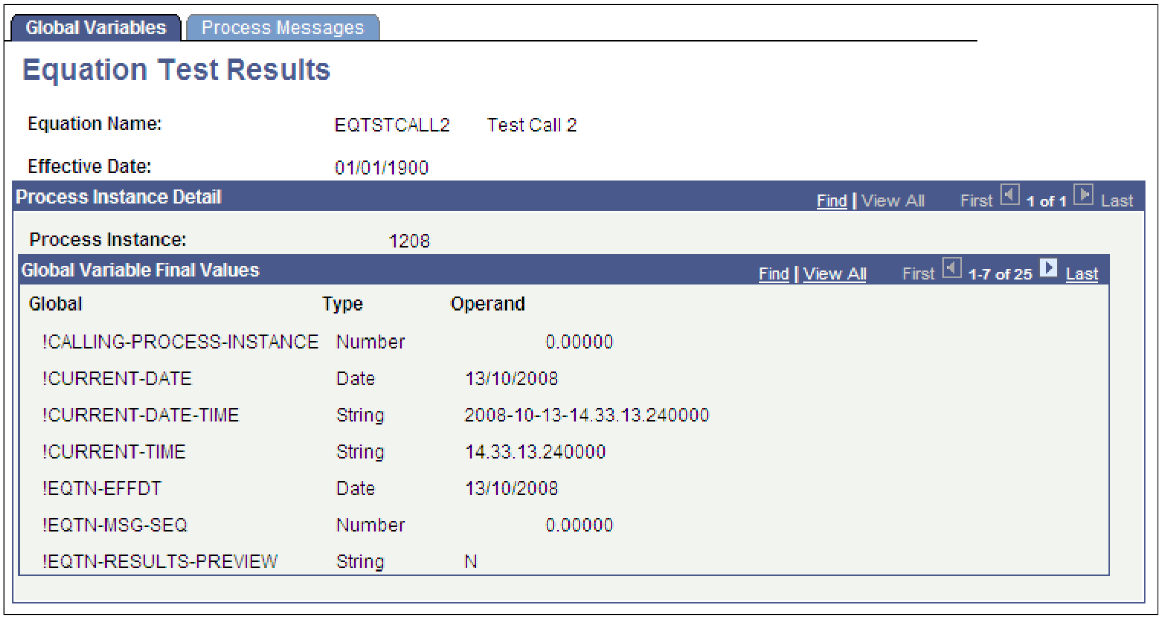
This example illustrates the fields and controls on the Equation Test Results page: Process Messages tab. You can find definitions for the fields and controls later on this page.



The page displays the messages associated with the equation test run.

Select the Global Variables tab.

This example illustrates the fields and controls on the Equation Test Results page: Global Variables tab. You can find definitions for the fields and controls later on this page.



The Global Variable page displays the global variables used within the current equation run.

Viewing Equations as Algebraic Expressions

This section discusses how to view equations as algebraic expressions.

You can view any equation that you are authorized to read on the Review Equations component (EQUATION_VIEW).

Page Used to View Equations as Algebraic Expressions

Page Name	***Definition Name***	***Navigation***	***Usage***
Review Equations	SCC_EQUATION_VIEW	• **Set Up SACR** > **Common Definitions** > **Equation Engine** > **Review Equations** • Click **Equation Detail** on the Related Item Type Group page, Packaging Plan page, FM Target page, IM Target page, Equity Rule page, Packaging Limits page, or the Packaging Rules 1 page to review an equation in read-only mode.	View equations as algebraic equations.

Viewing Equations as Algebraic Expressions

Access the Review Equations page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Review Equations**).

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

```
- <EQUATION>
    <EQUATIONNAME>EQTSTCALL2</EQUATIONNAME>
    <SKIP />
    <COMMENT>Test Call 2</COMMENT>
  - <IF>
      <NOT />
      Exists
      <LOCAL>FACTOR</LOCAL>
      <THEN />
    - <ASSIGN>
        <LOCAL>FACTOR</LOCAL>
        <GLOBAL>FACTOR</GLOBAL>
      </ASSIGN>
      <CALL />
      <EQTN>EQFACTORIAL</EQTN>
    - <CALLPARMS>
        <LOCAL>FACTOR</LOCAL>
      </CALLPARMS>
    </IF>
  - <MESSAGE>
      <GLOBAL>FACTOR</GLOBAL>
      <STRING>factorial is</STRING>
      <GLOBAL>RESULT</GLOBAL>
    </MESSAGE>
    <RETN />
  </EQUATION>
```

This page displays the equation name and an approximate algebraic representation of the equation. You cannot edit the equation in this page. Use the scroll bar to view the entire equation.

Note: This summary is a representation of the equation that you created on the Equation Editor page. The Equation Editor page determines how your equation functions.

Rounding in PeopleSoft Financial Aid Packaging Using Equations

This section provides an overview of rounding in Financial Aid Packaging.

Understanding Rounding in Financial Aid Packaging

The Packaging routine does not round up to whole dollar amounts when your equation yields a decimal result for a packaging limit. If the result contains decimals, the Packaging routine produces the following error message: "Message # 9146 Cannot disburse in whole dollars; award contains cents."

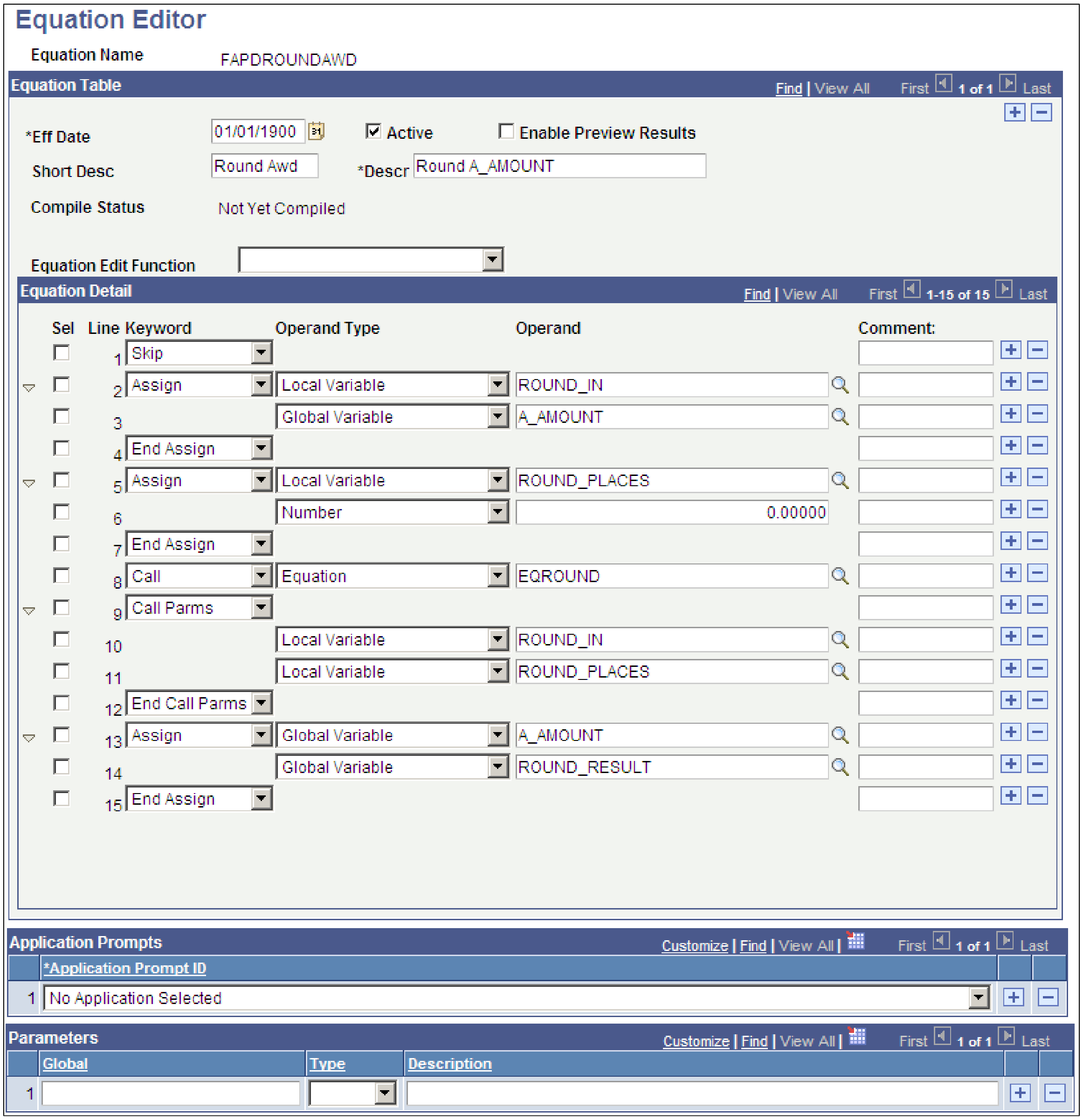
For those equations that need to yield a whole dollar result, you must use a rounding equation. You could accomplish this by employing one of two options:

- Option 1
  1. Create your A_AMOUNT equation, and at the bottom of the equation insert a Call statement to the delivered sample equation FAPDROUNDAWD.
  2. Review the FAPDROUNDAWD equation to determine the number of places beyond the decimal point that you want (0=integers or whole numbers, 1, 2, and so forth).
  3. Ensure that the Equation EQROUND is called as part of FAPDROUNDAWD.
- Option 2
  1. Create your A_AMOUNT equation, and at the bottom of the equation insert a Call statement to the delivered sample equation FAPDROUNDAWD.
  2. Review the FAPDROUNDAWD equation to determine the number of places beyond the decimal point that you want (0=integers or whole numbers, 1, 2, and so forth).
  3. Ensure that the Equation EQROUND is called as part of FAPDROUNDAWD.

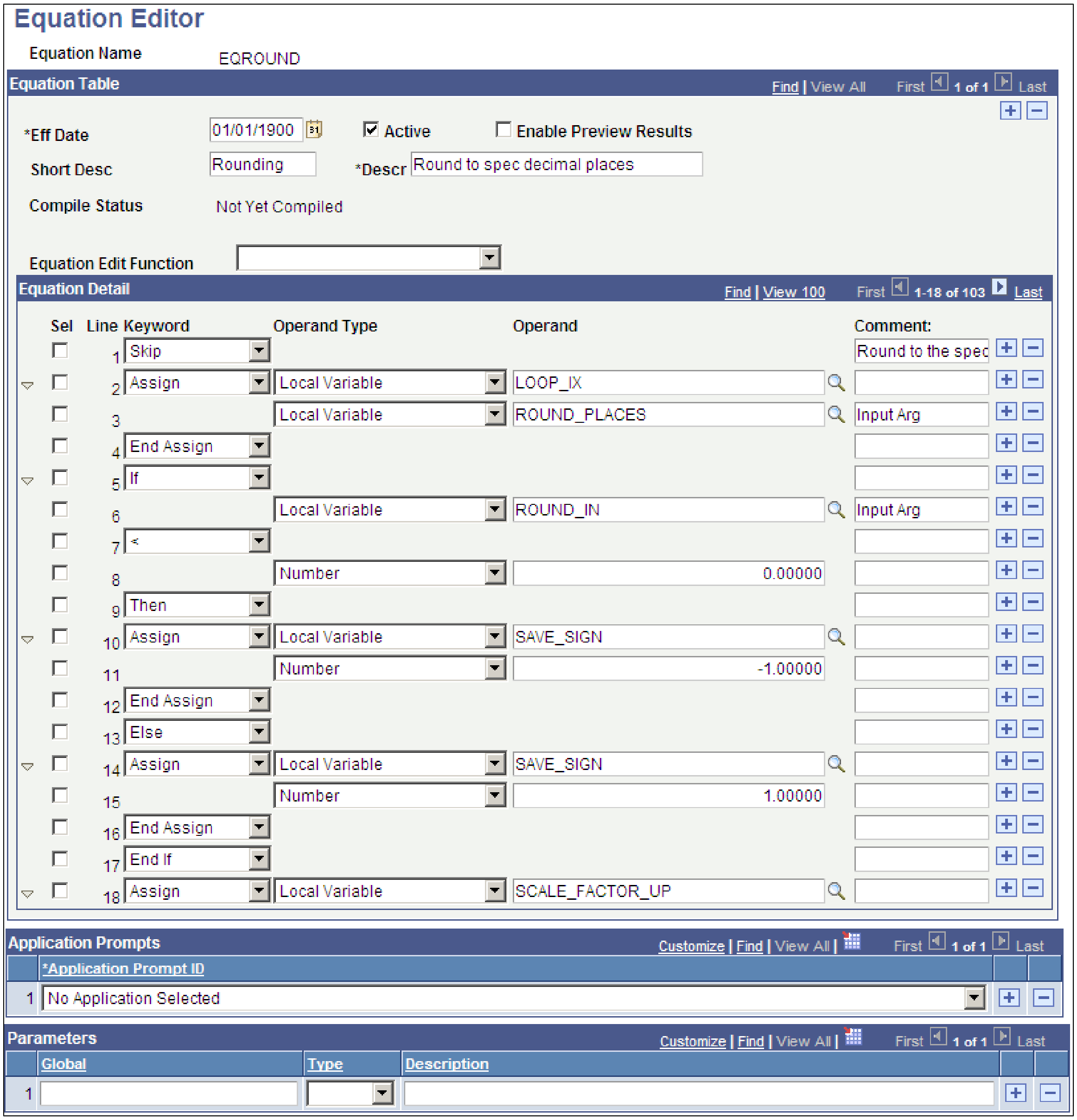
Important! For this rounding logic to work properly, all elements of FAPDROUNDAWD must be employed, and EQROUND must be called as part of that routine. Do not modify these components.

Here are two of the rounding equations that PeopleSoft Campus Solutions delivers:

This example illustrates the fields and controls on the Equation Editor (FAPDROUNDAWD) page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Equation Editor (EQROUND) page. You can find definitions for the fields and controls later on this page.



Reviewing Delivered Equations

Important! Financial Aid Notification (FAN) letter 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)

This section lists the PeopleSoft Campus Solutions-delivered equations.

Oracle delivers a set of feature-specific equations as part of Equation Engine. These represent either system-specific or demonstration-based equations.

Warning! Do not modify any system-specific equations, because compromising those equations has negative processing ramifications for the specific feature.

You can view any equation that you are authorized to read on the Review Equations component **(Set Up SACR > Common Definitions > Equation Engine > Review Equations).**

EQ* — Delivered System and Demo Equations

Equation Name	***Description***
EQCOMPILEALL	Compile All Active Equations
EQFACTORIAL	Factorial Sub Equation
EQROUND	Round to spec decimal places
EQROUNDBANK	Banker's Rounding
EQTNRUNCTL	Default Equation Run Control
EQTSTADD1	Test Add 1
EQTSTASGN1	Test Assignment Statement
EQTSTASSIGN2	Test Assign 2
EQTSTCALL1	Test Call 1
EQTSTCALL2	Test Call 2
EQTSTCALL3	Test Call 3
EQTSTCALL4	Test Call 4
EQTSTCALL5	Test Call 5
EQTSTCALL6	Test Call 6 - sql multi select
EQTSTCALL7	Test Call 7 - sql sel count
EQTSTCALL8	Call Test 8

Equation Name	***Description***
EQTSTDDF	Test Date Difference
EQTSTDIV1	TEST DIVIDE 1
EQTSTEXIST1	Test Exist 1
EQTSTEXIST2	Test Exit 2
EQTSTEXIST3	Test Exit 3
EQTSTEXT1	Test External 1
EQTSTEXT2	Test External 2
EQTSTFIND1	Test Find 1
EQTSTFIND2	Test Find 2
EQTSTFIND3	Test Find 3
EQTSTFIND4	Test Find 4
EQTSTFIND5	Test Find 5
EQTSTFIND6	Find 6
EQTSTHALT1	Halt Test 1
EQTSTIF1	Test If 1
EQTSTIF2	Test If 2
EQTSTIF3	Test If 3
EQTSTIF4	If Test 4
EQTSTLOOP1	Test Loop 1

Equation Name	***Description***
EQTSTMSG1	Test Msg 1
EQTSTMSG2	Test Msg 2
EQTSTMSG3	Test Msg 3
EQTSTMSG4	Test Msg 4
EQTSTMSG5	Test Msg 5
EQTSTMSG6	Test Msg 6
EQTSTMSG7	Test Msg 7
EQTSTMULT1	Test Multiply 1
EQTSTPAREN1	Test Paren 1
EQTSTPRECED1	Test Operator Precedence 1
EQTSTRETN1	Test Return 1
EQTSTRETN2	Test Return 2
EQTSTROUND1	Test Rounding 1
EQTSTSTEM1	Test Stem 1
EQTSTSTEM2	Test Stem 2
EQTSTSTEM3	Test Stem 3
EQTSTSTEM4	Test Stem 4
EQTSTSUB1	Test Subtract 1

FACE* — CommonLine Delivered Edits

Equation Name	*Description*
FACEDDELERRS	Delete Old Loan Edit Errors
FACEDGET1ST	Get First Run Control Info
FACEDGETCATG	Get Dest Category
FACEDGETCLPN	Get CL Pnote
FACEDGETDEST	Get Loan Dest Edit Data
FACEDGETORIG	Get Loan Origination Data
FACEDGETTYPE	Get Loan Type Data
FACEDLOGERR	Log Loan Edit Errors
FACEDUPDSTAT	Update Loan Action Status

FACL* — CommonLine Delivered Edits

Equation Name	*Description*
FACLOANEDITS	Fin Aid Loan Edits
FACLOANONEUP	One Up CRC Loan Validation

FACR* — Common Record CommonLine Delivered Edits

Equation Name	*Description*
FACRADDR01	Permanent address missing
FACRADDR02	Mailing address missing
FACRADDR03	Borrower perm address missing

Equation Name	*Description*
FACRADDR04	Borrower mailing addr missing
FACRBORROW01	Borrower missing
FACRCHNG01	Loan incr w/undisbursed check
FACRCOSIGN01	Cosigners Required
FACRCOSIGN02	Cosigner Signatures Required
FACRDEBT01	Total Loan Debt Missing
FACRDEPSTAT1	Dependency stat missing
FACRDEST01	Loan Dest Nbr is Zero
FACRDISBDT01	Disb 91 days after Ln Per End
FACRDISBDT02	Ln Per Strt - Disb Dt > 13
FACRDISBDT03	Disb dts require chron order
FACRDRVLIC01	Borrower DL or state missing
FACRGRADDT01	Grad dt before Loan End dt
FACRHOLDFED1	Disbursement Hold on Fed Aid
FACRNAME01	Student name missing
FACRNAME02	Borrower name missing
FACRPER01	Loan Per gt 1 Yr
FACRPLUS01 PLUS borr/stdnt SSN	same
FACRPLUS02	No PLUS for grad student

Equation Name	*Description*
FACRPLUSMPN	Serial PLUS MPN Check
FACRREFS01	References Required
FACRSRVCIN01	Service Indicators Exist
FACRSSN01	Borrower SSN is blank
FACRSSN02	Student SSN is blank

FAED* — CommonLine 4 Delivered Edits

Equation Name	*Description*
FAEDADDR01	Permanent address missing
FAEDADDR02	Mailing address missing
FAEDADDR03	Borrower perm address missing
FAEDADDR04	Borrower mailing addr missing
FAEDBORROW01	Borrower missing
FAEDCHNG01	Loan incr w/undisbursed check
FAEDCOSIGN01	Cosigners Required
FAEDCOSIGN02	Cosigner Signatures Required
FAEDDEBT01	Total Loan Debt Missing
FAEDDEPSTAT1	Dependency stat missing
FAEDDEST01	Loan Dest Nbr is Zero
FAEDDISBDT01 Disb	91 days after Ln Per End

Equation Name	***Description***
FAEDDISBDT02	Ln Per Strt - Disb Dt > 13
FAEDDISBDT03	Disb dts require chron order
FAEDDRVLIC01	Borrower DL or state missing
FAEDGRADDT01	Grad dt before Loan End dt
FAEDNAME01	Student name missing
FAEDNAME02	Borrower name missing
FAEDPER01	Loan Per gt 1 Yr
FAEDPLUS01	PLUS borr/stdnt SSN same
FAEDPLUS02	No PLUS for grad student
FAEDPLUSMPN	Serial PLUS MPN Check
FAEDREFS01	References Required
FAEDSRVCIN01	Service Indicators Exist
FAEDSSN01	Borrower SSN is blank
FAEDSSN02	Student SSN is blank

FAHD* — Hold and Release Delivered Edits

Equation Name	***Description***
FAHDLOADLVL	Load Level Status Check
FAHDSAPSTAT	Satisfactory Academic Progress

FALTR*— Forms Engine FAN Delivered Equations

Equation Name	***Description***
FANLTRDTRANG	Award Ltrs within a date range
FANLTRNONEED	No Need
FANLTRSCHONL	Scholarship Only
FANLTRSEL	Award Ltr Selection Criteria

FA_CRC* — CRC Loan Edits Delivered Edits

Equation Name	***Description***
FA_CRCEDITS	FA CRC Loan Edits

FA_* — CommonLine Delivered Edits

Equation Name	***Description***
FACEDDELERRS	Delete Old Loan Edit Errors
FACEDGET1ST	Get First Run Control Info
FACEDGETCATG	Get Dest Category
FACEDGETCLPN	Get CL Pnote
FACEDGETDEST	Get Loan Dest Edit Data
FACEDGETORIG	Get Loan Origination Data
FACEDGETTYPE	Get Loan Type Data
FACEDLOGERR	Log Loan Edit Errors
FACEDUPDSTAT	Update Loan Action Status

Equation Name	***Description***
FA_LOANEDITS	Fin Aid Loan Edits

FAPK* — Packaging System Equations

Equation Name	***Description***
FAPKAFDCPAR	Set global AFDC_PAR
FAPKAFDCSTU	Set global AFDC_STU
FAPKAGIPAR	Set global AGI_PAR
FAPKAGISTU	Set global AGI_STU
FAPKCHLSPPAR	Set global CHILD_SUPPORT_PAR
FAPKDEPENDST	Set global DEPNDNCY_STAT
FAPKDEPNDNTS	Set global DEPENDENTS
FAPKDTAPPREC	Set global DT_APP_RECEIVED
FAPKERNINPAR	Set global ERND_INC_CRED_PAR
FAPKEXEMPT	Set global NUM_EXEMPTIONS
FAPKEXEMPTPR	Set global NUM_EXEMPTIONS_PAR
FAPKGDATASRC	Get Packaging Data Source
FAPKLEGALRES	Set global LEGAL_RESIDENCE
FAPKMARSTPAR	Set global MARITAL_STAT_PAR
FAPKMAR_STAT	Set global MARITAL_STAT
FAPKMONVETBN	Set global MONTHLY_VET_BEN

Equation Name	***Description***
FAPKNMFAMMEM	Set global NUM_FAMILY_MEMBERS
FAPKNMINCOLL	Set global NUMBER_IN_COLLEGE
FAPKNMMNVTBN	Set global NUM_MONTH_VET_BEN
FAPKNUMINCOL	Set global NUM_IN_COLLEGE
FAPKNUMINFAM	Set global NUMBER_IN_FAMILY
FAPKORPHAN	Set global ORPHAN
FAPKRDINSTCT	Read INST_CONTROL
FAPKRDINSTIN	Read INST_INTERPRET
FAPKRDINSTPR	Read Inst Parent
FAPKRDINSTST	Read Inst Student
FAPKRDISIRCT	Read ISIR_CONTROL
FAPKRDISIRPR	Read Isir Parent
FAPKRDISIRST	Read Isir Student
FAPKSPERNINC	Set global SPS_EARNED_INCOME
FAPKSSBENPAR	Set global SS_BENEFIT_PAR
FAPKSSBENSTU	Set global SS_BENEFIT_STU
FAPKSTATERES	Get State Residence
FAPKSTERNINC	Set global STD_EARNED_INCOME
FAPKTOTWKAP	Set global TOTAL_FROM_WKA_P

Equation Name	*Description*
FAPKUNTAXIN	Set global UNTAXED_INC
FAPKUNTAXINP	Set global UNTAXED_INC_PAR
FAPKVETERAN	Set global VETERAN

FAPD* — Packaging Demo Equations

Oracle strongly recommends that you not modify these equations. You can clone them to use a basis for your own similar equations.

Equation Name	*Description*
FAPDADJPCONT	Stored Value ADJ_PAR_CONTRIB
FAPDANNLOAD	Annual Load 1
FAPDANNLOAD2	Annual_Load 2
FAPDANNLOAD3	Annual Load 3
FAPDAPP_DATE	If Then Example DT_APP_RECEIVED
FAPDCLCIFAGI	Calc Variables based on AGI
FAPDCLCTLEFC	Calculate Award based on EFC
FAPDDEPENDNT	Dependent Students
FAPDDEPNDNTS	Dependents
FAPDDL_STATE	Award based on License State
FAPDDOBPRIOR	If Then Example of DOB_PRIOR
FAPDEARLYADM	If Then Else Example EARLY_ADM
FAPDEFC3000	Award based on FED_EFC <= 3000

Equation Name	***Description***
FAPDEFC4000	Award based on FED_EFC <= 4000
FAPDEFC6000	Award based on FED_EFC > 6000
FAPDEFCBOTH	Handles Both Award Periods
FAPDEFC_STAT	If Then Example of EFC STAT
FAPDFROSH	Award based on Freshman level
FAPDGAPBDGT1	Gap_Bdgt#1
FAPDGAPBDGT2	Gap_Bdgt#2
FAPDGRADELVL	Award based on NSLDS_LOAN_YEAR
FAPDGRADS	GRADUATES
FAPDHIGHEFC	Award where FED_EFC >= 10,000
FAPDINDPNDNT	Independent
FAPDJMET5000	Select if Unmet Need >= 5,000
FAPDLASTAWRD	Last Award
FAPDMDLABRAT	Award based on VARIABLE_FLAG7
FAPDMDSPCLTY	Award based on VARIABLE_CHAR3
FAPDMDTSTSCR	Award using VARIABLE_NUM5
FAPDPELLELIG	Select Pell Eligible Candidate
FAPDPELL_ELG	Pell Eligibility Flag Example
FAPDPLUS_INT	Example: Interest in PLUS Loan

Equation Name	***Description***
FAPDPRIM_EFC	Stored Val Example Primary EFC
FAPDPRJYRINC	If Then Example on PROJ_YR_INC
FAPDP_AFDC	Stored Value of Parents' AFDC
FAPDP_AGI	Stored Value of PAR_AGI
FAPDP_IM#COL	Inst Parent Number in College
FAPDP_IM_AGI	Inst Parent Number in College
FAPDP_MARSTT	If Then using MARITAL_STAT_PAR
FAPDP_NMCOLL	If Then: PAR NUM_IN_COLLEGE
FAPDP_WORK1	Parent 2005 ISIR WORKSHEET_A
FAPDP_WORK2	Parent 2005 ISIR WORKSHEET_B
FAPDP_WORK3	Parent 2005 ISIR WORKSHEET_C
FAPDREMNEED1	Remaining Need 1
FAPDREMNEED2	Remaining Need 2
FAPDREMNEED3	Remaining Need 3
FAPDROUNDAWD	Round A_AMOUNT
FAPDRUNGAWDS	Running TOTAL AWD AMT
FAPDSEC_EFC	Stored Value of SECONDARY_EFC
FAPDSPS_ERND	Stored Value of SPS_EARNED_INC
FAPDSSA_CITZ	If Then: SSA_CITIZENSHP_IND

Equation Name	***Description***
FAPDS_AFDC	Stored Value: AFDC_STU
FAPDS_AGI	Stored Value: AGI_STU
FAPDS_CHLSUP	Store Value CHILD_SUPPORT_RCVD
FAPDS_DEP_ST	If Then Example DEPNDNCY_STAT
FAPDS_EARNED	Stored Val: STD_EARNED_INCOME
FAPDS_IM_AGI	Award using IM Student AGI
FAPDS_IM_INC	Inst Student Income
FAPDS_MARRD	If Then Example of STU MARRIED
FAPDS_MAR_ST	If Then Example MARITAL_STAT
FAPDS_NUMCOL	If Then STU NUMBER_IN_COLLEGE
FAPDS_NUMFAM	If Then STU NUM_FAMILY_MEMBERS
FAPDS_ORPHAN	If Then And Example of ORPHAN
FAPDS_ST_SEL	If Then Example STATE_AGNCY_RLS
FAPDS_VA_BEN	Stored Value MONTHLY_VET_BEN
FAPDS_VETERN	If Then Example VETERAN status
FAPDS_WORK1	STUDENT_WORKSHEET_A
FAPDS_WORK2	STUDENT_WORKSHEET_B
FAPDS_WORK3	STUDENT_WORKSHEET_C
FAPDTGTRMNED	Award using I_TRGT_FED_RMNEED

Equation Name	***Description***
FAPDTIV_ELIG	If Then Example: TITLEIV_ELIG
FAPDTOTALINC	Stored Value of TOTAL_INCOME
FAPDTOTPRCNT	Stored Value TOTAL_PAR_CONTRIB
FAPDTOTSCONT	Stored Value TOTAL_STU_CONTRIB
FAPDTRANS_DT	Award using TRANS_PROCESS_DT
FAPDUGRADS	UNDERGRADS
FAPDUMET1000	Select FED_RMNEED >= 10,000
FAPDUNGRADS	Undergraduates
FAPDVALIDEFC	Award using VALID_EFC_CALC
FAPDVGAPAWRD	VGAP Award Amount
FAPDVIRGNRES	If Then: STATE_RESIDENCE = VA
FAPD_APPDATE	IF THEN DATE > 2003/01/01
FAPD_IM_#COL	Award using Stu Nbr in College

SFTD* — SF Tuition Calculation Delivered Equations

Equation Name	***Description***
SFTDBILLUNIT	Billing Units
SFTDCSSTDYFE	Case Study Fees
SFTDMDLABRAT	Medical School Laboratory Fees
SFTDMDSCTUIT	Medical School Tuition

Equation Name	*Description*
SFTDMDSPECLT	Medical Speciality
SFTDMDTESTSC	Medical School Test Scores
SFTDRSRCHFEE	Research Project Fees
SFTDUGRAD	Undergraduate
SFTDUGRDAMT	SF UGRD Pay Amount
SFTDUGRDSEL	SF UGRD Select
SFTDTFTRMTRM	Term Fee Charge by Term Adjust by Term
SFTDTFTRMSES	Term Fee Charge by Term Adjust by Session
SFTDTFTRMCLS	Term Fee Charge by Term Adjust by Class
SFTDTFSESTRM	Term Fee Charge by Session Adjust by Term
SFTDTFSESCLS	Term Fee Charge by Session Adjust by Class
SFTDCLSTRM	Term Fee Charge by Class Adjust by Term
SFTDCLASSNBR	Class Fee A_Amount
SFTDCLSSEL	Class Fee A_Select
SFTDCOURSEID	Course ID A_Amount
SFTDCLSWVR	Course Fee A_Amount Negative

Viewing Sample Equations

This section discusses the syntax of sample equations delivered by Oracle.

You can view any equation that Oracle delivers on the Equation Editor page **(Set Up SACR > Common Definitions > Equation Engine > Equation Editor).**

Loan Validation Edit Equation

This is a loan validation edit that checks whether the borrower has been defined on the loan origination table.

Line Number	*Equation Keyword*	*Operand Type*	*Operand*	*Comment*
1	SKIP			Borrower Missing
2	ASSIGN	Local Variable	EQUATION_NAME	
3		String	FACRBORROW01	
4	END ASSIGN			
5	CALL	Equation	FACEDGETDEST	
6	CALL PARMS			
7		Local Variable	EQUATION_NAME	
8	END CALL PARMS			
9	IF			
10		Global Variable	DEST_ACTV	
11	<>			
12		String	Y	Edit not active
13	THEN			
14	RETURN			
15	END IF			
16	IF			
17		Table	LOAN_ORIGNATN	
18		Field	BORR_EMPLID	

Line Number	***Equation Keyword***	***Operand Type***	***Operand***	***Comment***
19	=			
20		String		
21	THEN			
22	CALL	Equation	FACEDLOGERR	
23	CALL PARMS			
24		Local Variable	EQUATION_NAME	
25	END CALL PARMS			
26	END IF			
27	RETURN			

Satisfactory Academic Progress Equation

This is a hold/release demonstration equation to verify satisfactory academic progress for a student.

Line Number	***Equation Keyword***	***Operand Type***	***Operand***	***Comment***
1	SKIP			Satisfactory Academic Progress Check
2	FIND FIRST	Local Variable	FOUND_STDNT_AID_ATRBT	
3		Table	STDNT_AID_ATRBT	
4		Keyed Global Equal	EMPLID	
5		Keyed Global Equal	INSTITUTION	
6		Keyed Global Equal	AID_YEAR	
7		Keyed Global Equal	TABLE_ID	

Line Number	***Equation Keyword***	***Operand Type***	***Operand***	***Comment***
8	END FIND			
9	IF			
10	NOT			
11		Local Variable	FOUND_STDNT_AID_ATRBT	
12	Then			
13	Message	String	No row in STDNT_AID_ATRBT	
14		String	for key values	
15		Global Variables	EMPLID	
16		Global Variable	INSTITUTION	
17		Global Variable	AID_YEAR	
18		Global Variable	TABLE_ID	
19	END MESSAGE			
20	ASSIGN	Global Variable	RESULT	
21		String	FAILED	
22	END ASSIGN			
23	ASSIGN	Global Variable	HR_MSG_SET_NBR	
24		String	14432	
25	END ASSIGN			
26	ASSIGN	Global Variable	HR_MSG_NBR	
27		String	00001	

Line Number	*Equation Keyword*	*Operand Type*	*Operand*	*Comment*
28	END ASSIGN			
29	RETURN			
30	END IF			
31	IF			
32		Table	STDNT_AID_ATRBT	
33		Field	SAT_ACADEMIC_ PRG	
34	=			
35		Prompted Value	Y	
36	OR			
37		Table	STDNT_AID_ATRBT	
38		Field	SAT_ACADEMIC_ PRG	
39	=			
40		Prompted Value	P	
41	THEN			
42	ASSIGN	Global Variable	RESULT	
43		String	PASS	
44	END ASSIGN			
45	ELSE			
46	ASSIGN	Global Variable	HR_MSG_SET_NBR	
47		String	14432	

Line Number	Equation Keyword	Operand Type	Operand	Comment
48	END ASSIGN			
49	ASSIGN	Global Variable	HR_MSG_NBR	
50		String	00002	
51	END ASSIGN			
52	ASSIGN	Global Variable	RESULT	
53		String	FAILED	
54	END ASSIGN			
55	END IF			

Undergraduate Status Equation

This is a packaging selection equation that checks for undergraduate status.

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	IF			
2		Global Variable	ACAD_CAREER	
3	=			
4		String	UGRD	
5	THEN			
6	ASSIGN	Global Variable	A_SELECT	
7		String	T	
8	END ASSIGN			
9	ELSE			

Line Number	***Equation Keyword***	***Operand Type***	***Operand***	***Comment***
10	ASSIGN	Global Variable	A_SELECT	
11		String	F	
12	END ASSIGN			
13	END IF			

Chapter 30

Working with Campus Solutions Digital Assistant

Delivered Campus Solutions Skills

Use these skills together with a digital assistant to enhance the user experience in Campus Solutions.

These skills are included in the delivered Campus Solutions digital assistant.

Student Records Skills

- Enrollment Assistant Bot (SSR_ENROLLMENT_SKILL) helps students view enrollment dates and appointments.
- Grade Assistant Bot (SSR_GRADE_SKILL) helps students search and view their class grades.
- Schedule Assistant Bot (SSR_SCHEDULE_SKILL) helps students view their class and exam schedules.
- Classroom Location Assistant Bot (SSR_CLASS_LOCATION_SKILL) lets students launch Google Maps to get driving, walking, and transit directions to their classrooms. This bot includes a third-party integration with Google Maps.
- Small Talk Assistant Bot (SSR_SMALLTALK_SKILL) helps students train the bot. When students do small talk with the bot, it helps train the bot with more words and statements. This helps facilitate the flow of conversation in each skill.

Campus Community Skills

Student Holds Assistant Bot (SCC_HOLDS_SKILL) helps students view any holds on their record. Students can filter holds by assigning department.

Student Financials Skills

Student Accounts Assistant Bot (SSF_STUDENT_ACCOUNT_SKILL) helps students view their current amount due, account details, as well as make a payment.

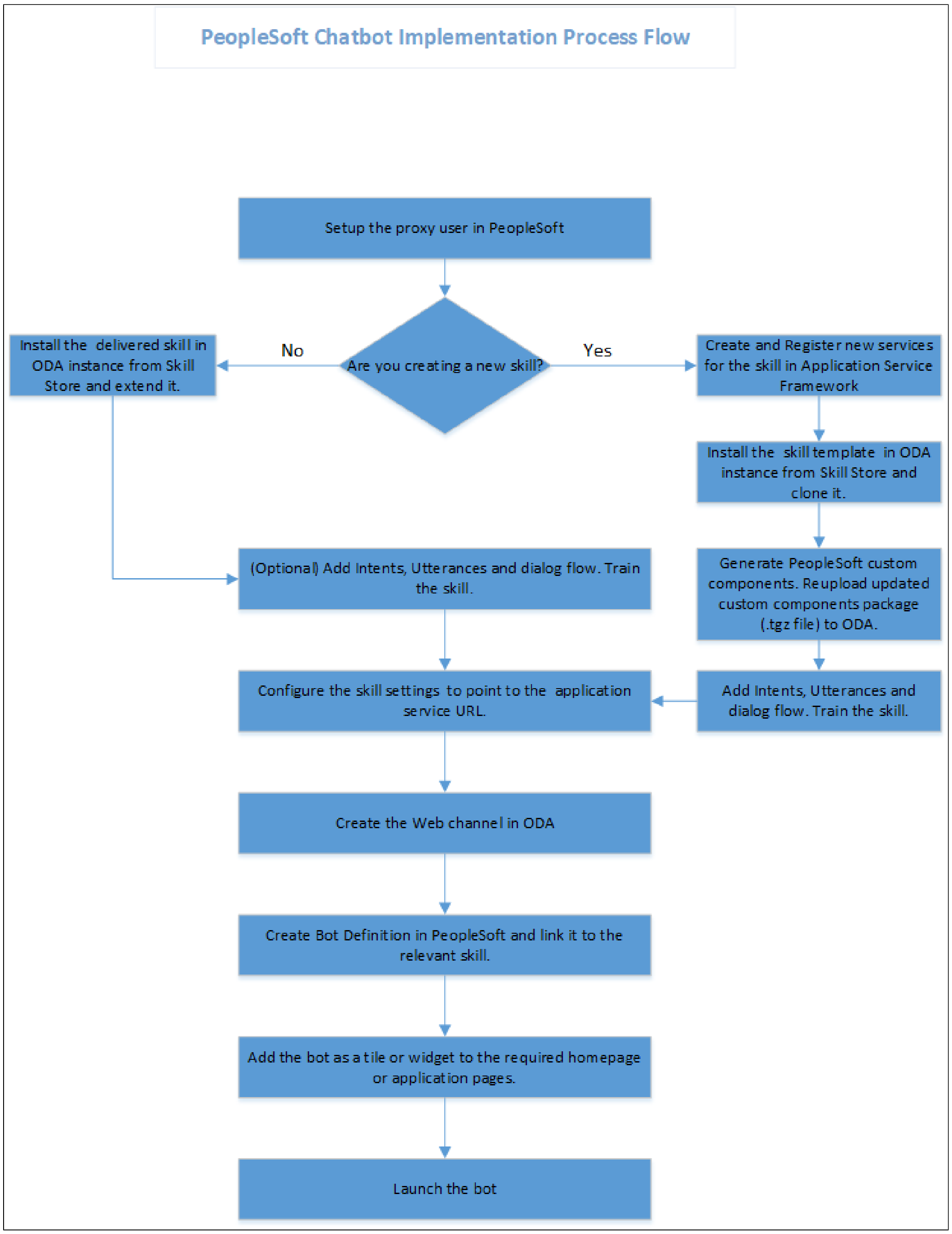
Deploying PeopleSoft Campus Solutions Digital Assistant

Campus Solutions (CS) delivers a digital assistant (commonly known as a chatbot) equipped with various skills. Skills are individual chatbots, designed to interact with users to fulfill specific tasks using a combination of text messages and simple user interface (UI) elements. Users can interact with the digital assistant using natural language conversations.

To use the digital assistant, these are the minimum requirements:

- PeopleTools 8.57 or higher
- PeopleSoft Campus Solutions 9.2.015 or higher
- Oracle Digital Assistant (ODA) subscription

Here's an overview of the digital assistant deployment process.



And here are a few things to note:

- The basic digital assistant or skills you install from the Skill Store may not satisfy all your requirements, or you might want to modify them to align with your business processes. You can't modify an installed assistant or skill directly, but you can create an extension of it and then modify that extension.
- If you want to add skills to the digital assistant in the future, you would need to install the skill, add the skill to the digital assistant, then extend the skill.

For information on fluid pages and controls, see the product documentation for *PeopleSoft Enterprise Components*: "Working With the PeopleSoft Fluid User Interface."

See also the product documentation for Oracle Digital Assistant (ODA).

Creating a Proxy User

A proxy user is necessary to integrate the digital assistant with application services in the Chatbot Integration Framework.

1. As an administrator, navigate to **PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **User Profiles**.
2. Click **Add a New Value**.
3. In User ID, enter **PSFTPROXY**, then click **Add**.
4. On the General page, in **Symbolic ID**, select **SYSADM1**.
5. In **New Password**, enter a password.
6. In **Confirm Password**, enter the same password you provided.
7. Deselect **Password Expired**.
8. Click **ID**.
9. Make sure ID Type is set to **None**.
10. Click **Roles**.
11. In User Roles, add the following roles:
    - PTCB_USER
    - EOCB Service User
    - EOCB Admin User
    - EOCB Client User
12. Click **Save**.

Related Links

“Understanding Security for the Chatbot Integration Framework” (Enterprise Components)

Installing the Digital Assistant

Once you have an ODA subscription and have created a proxy user, you can install the digital assistant.

1. Log in to your ODA instance, then click , then select **Development** > **Store**.
2. Search for the digital assistant. For example, to get PeopleSoft Campus Solutions assistants, search for "Campus Solutions."
3. In the tile of the skill or assistant you want to add, click , then select **Pull**.

Note that the process to install skills is similar to installing a digital assistant.

Extending a Digital Assistant

Extending a digital assistant enables you to customize it in several ways. When a new version appears in the Skill Store, you can transfer your customizations to the new version by rebasing.

Not that you won't be able to modify an installed assistant or skill directly, but you can create an extension of it and then modify that extension. For more information on extending skills or digital assistants, refer to the ODA documentation. There you'll find details about what extending a skill or digital assistant is for, and the difference between cloning and extending.

Here's what you need to do to extend a digital assistant:

1. Click , then select **Development** > **Digital Assistants**.
2. Search for the digital assistant.
3. In the tile for the digital assistant you want to extend, click , then select **Extend**.
4. Fill out **Display Name** and **Name**. You should provide a display name and name that's different from the name of the digital assistant you're extending.
5. Click **Extend**.
6. Click the tile of the new digital assistant, and note the skills included in it.

When you extend a digital assistant, the base skills that were in the original version are carried over to the extended version of the digital assistant.

Extending a Skill in an Extended Digital Assistant

After extending the digital assistant, you have to extend the base skills that it uses. Doing so lets you change the configuration of the base skill.

Note: You don't have to extend the Small Talk Skill. But if you plan to update the skill at any point, you can choose to extend it.

You will have to run through these steps for every skill in the extended digital assistant.

1. Click , then select **Development** > **Skills**.

2. Search for the skill.
3. In the tile for the skill you want to extend, click ⋮, then select **Extend**.
4. Fill out **Display Name** and **Name**. Similar to what you did for the digital assistant when you filled out the name fields, make sure you provide names that are different from the base skill you're extending.
5. Click **Extend**.

Adding Extended Skills to an Extended Digital Assistant

After extending the skill, add them to the digital assistant you extended.

1. Click ☰, then select **Development** > **Digital Assistant**.
2. Look for the extended digital assistant, then select it.
3. Click ⚙, then click **Configurations**.
4. Look for the System Intents Mappings section.
5. Note down the values in "Digital Assistant Custom UnresolvedIntent Skill" and "Digital Assistant Custom UnresolvedIntent State." You will need them later.
6. In Digital Assistant Custom UnresolvedIntent Skill, select **No Selection**. Doing this also automatically sets Digital Assistant Custom UnresolvedIntent State to the same value.
7. Click . You should see all the base skills in the extended digital assistant.
8. To replace a base skill with its extended version, you need to perform the following actions for each skill contained in the digital assistant:
    a. Click the skill.
    b. Click **Update Skill**.
    c. From the Update Skill dialog, select the new version of the skill.
    d. Click **Update Skill**.
9. Click ⚙, then click **Configurations**.
10. Go to the System Intents Mappings section.
11. In Digital Assistant Custom UnresolvedIntent Skill, select the extended Grade skill.
12. In Digital Assistant Custom UnresolvedIntent State, select or enter **ssr_unresolved**.

Creating a Channel

Channels serve as messaging platforms, which lets users access the skill or digital assistant. A single digital assistant or skill can have several channels configured to allow access to it. This setup enables the digital assistant or skill to run on different services simultaneously.

In this section, we're creating a Web channel. While creating the Oracle Web Channel, note down the **Channel Id** value generated that's generated. This value is added to the corresponding PeopleSoft bot definition in Creating Bot Definitions. The **Client Authentication Enabled** option should be disabled.

1. Click , then click **Development** > **Channels**.
2. Click **Add Channel**.
3. In Name, enter a name for your channel.
4. In Channel Type, select **Oracle Web**.
5. In Allowed Domains, enter the actual domain name of the production environment.
6. Make sure the Client Authentication Enabled switch is off.
7. Keep the default value in Session Expiration (minutes).
8. Click **Create**.
9. With your channel selected, click the **Channel Enabled** switch to activate the channel.
10. In Route To, select the digital assistant you extended.
11. Note down the value in **Channel Id**.

Creating Bot Definitions

Setting up the bot definitions creates digital assistant clients in PeopleSoft, which then lets you use the digital assistant and skills.

1. From Campus Solutions, navigate to **Enterprise Components** > **Chatbot Configurations** > **Chatbot Definitions**.
2. From the General Configurations page, in Default Branding Template, keep the default value.
3. In ODA Server URI, enter the value that's part of the link to your ODA instance. For example, the link to your ODA instance will look something like this:

   ```
   https://<ODA_Server_URI>/botsui/home
   ```

   Get the value in the ODA_Server_URI portion of the URL, then place that value in ODA Server URI.
4. In Bot Definitions, click the **Edit** button that corresponds to the the Bot ID *STU_CHAT_ASST*.
5. On the Maintain Bot Definition page, in Bot Channel ID, enter the channel ID value that you took note of when you created the channel.
6. Save your changes.

Related Links

"Creating Bot Definitions" (Enterprise Components)

Configuring the Tile

The digital assistant can be launched on CS fluid pages. Based on the settings you defined on the Bot Definition page, the assistant can be launched as a tile or widget.

1. From Campus Solutions, navigate to **PeopleTools** > **Portal** > **Structure and Content**.
2. Click **Add Content Reference**.
3. On the General page, in Name, enter **EOCB_STUCHATASST_FL_GBL**.
4. In Label, enter a descriptive label for the digital assistant. For example, you can use "Student Assistant."
5. In Node Name, select **SA**.
6. In URL Type, select **PeopleSoft Generic URL**.
7. In Portal URL, enter **c/EOCB_MENU_FL.EOCB_CLIENT_FL.GBL?BOTID=NEW_SKILL**

   Make sure you replace *NEW_SKILL* with the Bot ID value from the Chat Definitions page. The value you enter will look like:

   c/EOCB_MENU_FL.EOCB_CLIENT_FL.GBL?BOTID=STU_CHAT_ASST
8. Click **Security**.
9. Make sure you select **Author Access**.
10. From Security Authorizations, in Permission List, select **EOCB_CLIENT_USER**.
11. Click **Fluid Attributes**.
12. In Image Name, select your preferred image.
13. In Display In, select **Modal**.
14. In Modal Parameters, enter:

    $Style@frame-pt_chatclientpage;bAutoClose@0;width@600;height@1000;
15. In Folder, select a folder to create a link to the tile repository. For example, you can select CS_SCC_STUDENT_SELFSERV (Student Self Service).
16. Save your changes.

Related Links

“Adding Chatbot to Application pages” (Enterprise Components)

Adding the Tile to the Homepage

Students or university staff would have to configure their homepage in order to launch the digital assistant. This means adding the tile where the digital assistant is configured to their homepage.

1. From Campus Solutions, click the **Homepage Actions** button, then click **Personalize Homepage**.

2. Click **Add Tile**.
3. Search for the label you assigned in Configuring the Tile (step 4), then click **Add**.

   If you entered "Student Assistant," then search for that.
4. Save your changes.

You should see the digital assistant on the homepage. Clicking the tile launches the digital assistant.

Note: To ensure the digital assistant appears on the homepage, the user's user profile should have the "EOCB Client User" role assigned.

Updating the Custom Component Package of a Skill

You would have to update the component package of a skill to interface with ODA's custom component service. This service is an active connection from the skill to the host server.

Note that you will have to perform this procedure for any new skills that you add to the digital assistant in the future.

1. Make sure you have these software:
   - Oracle Digital Assistant Bots Node.js software development kit (SDK) (bots-node-sdk), which you can get from GitHub.
   - Node.js 8.11.4, which you can get from https://nodejs.org. Install this for global access. Node Package Manager (npm) is distributed with Node.js.
2. To test if Node.js and npm are installed, open a terminal window and type these commands:

```
node -v
npm -v
```

3. To verify your Oracle Digital Assistant Bots Node.js SDK installation, type the following command:

```
bots-node-sdk -v
```

   The command should print the Oracle Digital Assistant Bots Node.js SDK version.
4. Log in to your ODA instance.
5. Click , then select **Development** > **Digital Assistants**.
6. Select the digital assistant to open its page. You will see the first skill on the list selected.
7. From the selected skill, click **Go to Skill**.
8. Click .
9. Download the package (.tgz) file, then update the `environments.json` file.
   a. Look for the package (.tgz) file you downloaded.
   b. Extract the contents of the file to your local drive.

c. Extract the .tar file in the same folder that the package file is in.

A `package` folder will appear.

d. From the `package` folder, navigate to **psft-lib** > **config**.

e. Open **environments.json**.

f. Update the server, port, and node values in baseURL using the information from your PIA server.

```
"baseURL": "http://<server>:<port>/PSIGW/RESTListeningConnector/<node>/
PTCB_APPL_SVC.v1"
```

So, if your PIA URL looks like this:

```
http://server.com:8000/psp/s17cbguix/?cmd=login&languageCd=ENG&
```

Then your baseURL value will look like this:

Field	***Value***
<server>	server.com
<port>	8000
<node>	S17CBGUI (this alphanumeric text should be capitalized)

If your PIA URL uses `http`, then the baseURL should also use `http`. If it uses `https`, then use `https`.

g. From your computer, launch the command prompt.

h. Go to the directory where the package folder is stored, then from the command prompt enter **npm pack**.

This creates a package with the updates you made and a new TGZ file is saved in the same package folder.

In the future, if you wish to update the component package file, make sure you delete the existing .tgz file before you run the `npm pack` command.

10. Upload the package (.tgz) file you updated.

a. Go back to your browser where you have your ODA instance open.

b. From the Components page of the digital assistant (the one you accessed from step 8), make sure you're on the page of the skill you downloaded the package file from.

c. In Package File, click the Change package file icon, then locate the .tgz file you created to upload it to the skill.

The upload is complete when the Status indicates `Ready`.

11. Repeat steps 7 to 10 for the other skills.

Note: Skip the Small Talk skill.

Training the Skills and Digital Assistant

Training your digital assistant or skill facilitates goal-oriented conversations between users and a machine. This means the machine must understand natural language. This understanding isn't semantic, but a prediction the machine makes based on a set of training phrases.

1. From your ODA instance, click , then select **Development** > **Digital Assistants**.
2. Click the extended digital assistant.
3. Select a skill from the assistant's list of skills, then click **Go to Skill**.
4. Click .

   The red indicator on the train icon means the skill needs to be trained.
5. From the dialog that appears, select **Trainer Tm**, then click **Submit**.
6. Repeat steps 3-5 for the other skills in the digital assistant.
7. After training all the skills in the digital assistant, navigate again to your extended digital assistant, then click the corresponding train icon.
8. From the dialog that appears, select **Trainer Tm**, then click **Submit**.

Connecting to a PeopleSoft Application Service

In your ODA instance, navigate to the extended digital assistant's page, then update the parameters of each skill using the information from your PIA server. Start with the Enrollment Skill.

Note: When you update the parameters for the Enrollment Skill, the parameters for Grade and Schedule Skills that you've added to the digital assistant are also automatically updated. The same is true for all new skills that you add to the digital assistant.

If your PIA URL looks like this:

```
http://server.com:8000/psp/s17cbguix/?cmd=login&languageCd=ENG&
```

Then the parameters should look like this example:

Field	***Value***
CS domain	`s17cbguix`

Field	***Value***
CS domain base url	`http://server.com:8000/`
da.PSauthurl	`http://server.com:8000/PSIGW/RESTListeningConnector/S17CBGUI/PTCB_APPL_SVC.v1`

If your PIA URL uses `http`, then the domain base URL and PSauthurl should also use `http`. If it uses `https`, then use `https`.

Testing the Digital Assistant

Do the following to test the chatbot functionality.

1. Log in as the student or university staff whose homepage was configured in Adding the Tile to the Homepage.
2. Click the chatbot **Student Assistant**.

   The chatbot launches. You should be able to engage the chatbot using the skills that were added to it. For example, you can find the enrollment dates of the logged-in user.

Troubleshooting Digital Assistant Issues

This section lists issues you might run into when using the digital assistant.

Assistant isn't loading

Check if the ODA server URI and Bot channel ID are correct. See Creating Bot Definitions.

Assistant isn't responding to a message

- Make sure the channel is routed to the appropriate skill or digital assistant.
- Turn off client authentication.
- In Allowed Domains, enter ***** to allow requests from all domains.

  You could also restrict the value to a PeopleSoft domain.

See Creating a Channel.

Error messages

Error	***Solution***
Oops! I'm encountering a spot of trouble. Please try again later.	ODA may be down. Wait until ODA is up and running.

<table>
<tr><th>Error</th><th>Solution</th></tr>
<tr><td>Oops! Something went wrong while connecting to PeopleSoft. Check your network connection, or contact your system administrator.</td><td>Try the following solutions:
• In ODA, check the yaml code of the skill for syntax errors, and correct these errors if they exist.
• Navigate to PeopleTools > Utilities > Administration > Message Catalog. Check if any of the message catalog numbers specified in the yaml code of the skill exist in PeopleSoft.
• Navigate to PeopleTools > Security > User Profiles > User Profiles. Make sure that the user PSFTPROXY exists, isn't locked out, and has the appropriate roles. If it's locked out, unlock the account and reset the password.
If you reset the password, you need to run through Updating the Custom Component Package of a Skill again to update PSFTPROXY's password.
• Ensure the environment's JSON file has the correct URL, user ID, and password for PSFTPROXY. See Updating the Custom Component Package of a Skill.
• In ODA, ensure that the parameters of the skill in the digital assistant are correct. See Connecting to a PeopleSoft Application Service.</td></tr>
<tr><td>Failed to sign in! Please check your credentials and try again.</td><td>This error appears either because the skill doesn't have the EOCB_CLIENT_USER or an incorrect role is assigned to it.
To assign the role:
1. From Campus Solutions, navigate to PeopleTools > Integration Broker > Application Services > Administration > Application Services Security.
2. In Bulk Permissions, look for the appropriate App Service ID, Index, Method, and Root Resource of the skill, then click the corresponding Set Security.
3. Make sure EOCB_CLIENT_USER is assigned, and that it has full access. If it isn't assigned, then add it.
4. Save your changes.</td></tr>
</table>

Chapter 31

Introducing Customer Relationship Management for Higher Education

Understanding CRM for Higher Ed

Note: CRM for Higher Ed is an extensive feature. To fully understand the functionality, it is important to read the identified CRM documentation sections and the related Developer's Guide.

The PeopleSoft CRM for Higher Education 9.1 release deeply integrates with Campus Solutions for best practice recruitment and retention business process flows, and shares and transfers data between the two systems. This new feature extends the ability to utilize Campus Solutions (CS) and PeopleSoft CRM together to improve institution goals in recruiting and retention. CRM for Higher Ed functionality primarily impacts three areas within CS:

- Prospective student recruiting, including test score processing.

  See *PeopleSoft CRM for Higher Education,* "Recruiting Students"

  See “Understanding External Test Score Data Processing” (Recruiting and Admissions)

- Retention

  See *PeopleSoft CRM for Higher Education,* "Retaining Students"

  See *PeopleSoft CRM for Higher Education,* "Service Center for Higher Education"

- The 360-degree view of constituent records and constituent support services.

  See *PeopleSoft CRM for Higher Education,* "Working with the 360-Degree View"

CRM uses CS Search/Match functionality to look for suspect and prospect records, so that your institution can identify and resolve any potential duplicate records. CRM then updates the records as applicants. CRM also respects CS user security; if a user ID is the same in both CRM and CS, then access is the same in both systems.

Some CS setup is required, to enable interaction with CRM for Higher Ed, on the Student Admin Installation and Configure Integrations components. Additional PeopleTools setup and configuration is also required in Integration Broker to define the services and messaging that facilitate information sharing between the two systems. The CS and CRM systems must be connected and synchronized to enable CRM for Higher Ed to function properly. The *CRM for Higher Education Developer's Guide* contains detailed information on setting up Integration Broker.

Important! Your system must have PeopleTools release 8.5 installed to properly use CRM for Higher Ed functionality.

Enabling Integration with CRM for Higher Ed

This section discusses how to:

- Enable CRM for Higher Ed integration.
- Exchange data using enterprise integration points (EIPs).

Page Used to Enable CRM for Higher Ed

Page Name	***Definition Name***	***Navigation***	***Usage***
SA Features	SCC_INSTALL_SA2	**Set Up SACR** > **Install** > **Student Admin Installation** > **SA Features**	Enable integration with CRM for Higher Education functionality.

Enabling CRM for Higher Ed Integration

Access the SA Features page (**Set Up SACR** > **Install** > **Student Admin Installation** > **SA Features**).

If CRM and Campus Solutions are both licensed at your institution, select the **CRM for Higher Education** check box to enable CS and CRM to share data in real time.

Further setup for messaging is addressed in the *CRM for Higher Education Developer's Guide* in My Oracle Support (ID 1982671.1).

Exchanging Data Using EIPs

This section provides an overview of EIPs for messaging between CS and CRM, as well as business process flows.

Understanding EIPs

When PeopleSoft CRM for Higher Education 9.1 is enabled, CRM can be the system of record for recruiting and retention. This functionality provides recruiters with a wide variety of data about suspects, prospects, and applicants. When there is a change in lifecycle data for a student in CS, that data change needs to be reflected in CRM as well. 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.

EIPs follow an asynchronous model. The systems simply send messages, without expecting any acknowledgement. Messages are activated and configured using Integration Broker. The *CRM for Higher Education Developer's Guide* contains detailed information on activating messages for Integration Broker.

See *CRM for Higher Education Developer's Guide* in My Oracle Support (ID 1982671.1).

Delivered EIPs

There are two steps to using EIPs. Before your system can use them, your institution must have data set up within CS (such as academic structure, terms, types, test IDs) and must also implement role-based security for programs and plans. EIPs bring this data into CRM. Then, your system can trigger EIP messages, which CRM then subscribes to and populates the tables within the CRM system that hold that data. All EIP messages send data from CS to CRM, except for SAD_TEST_SCORES_SYNC, which is a bidirectional message.

When triggered, control table EIP messages populate setup tables in CRM and then populate pages with the same data setup in CS. After the control table data is in CRM, users can then create prospects. Note that prospect, applicant, and student data EIPs are designated *sync* or *fullsync.* Fullsync EIPs republish all the data in their source records at once. Incremental sync EIPs send real-time sync messages; as soon as you make a change in CS, the system triggers the sync and sends only the changed information to PeopleSoft CRM. EIPs can be published in batch mode or online mode. Batch mode is used when an Application Engine, SQR, or COBOL process updates many records; online mode is used when ad hoc updates are made to a particular record.

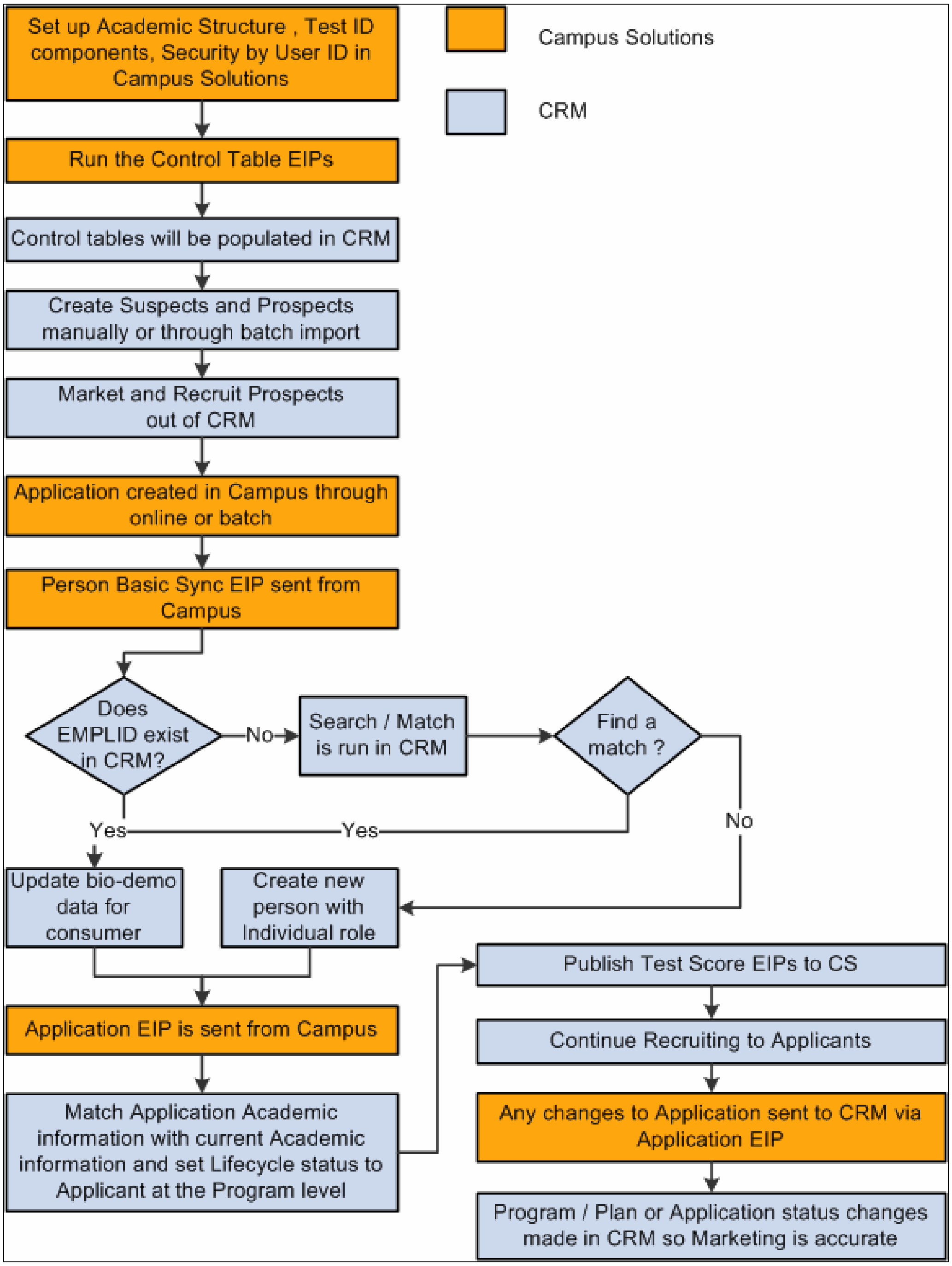
The *CRM for Higher Education Developer's Guide* contains detailed information on all delivered EIPs and web services.

See *CRM for Higher Education Developer's Guide* in My Oracle Support (ID 1982671.1).

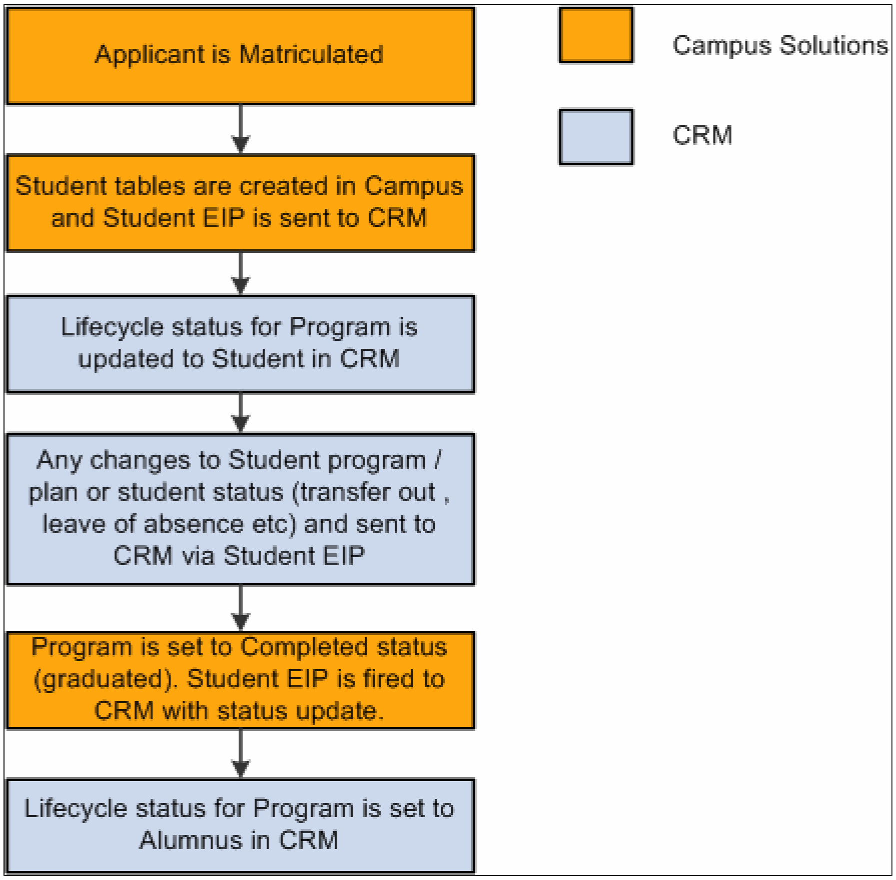
Business Process Flow Examples

The following graphics illustrate two examples of an EIP sequence as the messages move data between CS and CRM:

Workflow illustrating the system steps to pass messages between Campus Solutions and CRM when suspects become applicants.



Workflow illustrating the system steps to pass messages between Campus Solutions and CRM when applicants become alumni.



Configuring the CRM 360-Degree View

This section provides an overview of the 360-degree constituent view and its security, lists prerequisites, and discusses how to:

- Configure Campus Community data filters.
- Configure Financial Aid data filters.
- Configure Contributor Relations data filters.
- Review configuration scenarios.

Understanding the CRM 360-Degree Constituent View

The CRM 360-Degree View component displays summary information that enables generalists and specialists to solve the higher education issues reported by constituents. In addition, the functionality enables a holistic, actionable view of the constituent that combines CRM and CS data in real time and is configurable depending on the role (marketer, recruiter, advisor, and so on) of the user who is accessing the component. CS provides this summary information through Integration Broker services. These services call the core CS system and respond to CRM with an aggregation of data that populates the following Higher Education sections of the 360 Degree View:

- Biodemographic Information
- 3C's - Interactions
- Recruiting
- Admissions
- Transfer credits
- Academics
- Finances
- Financial aid
- Transcript requests
- Contributor Relations
- Affiliations

See *PeopleSoft CRM for Higher Education,* "Working with the 360-Degree View."

The system uses an aggregation web service (SCC_CONSTITUENT - SCC_CONSTITUENT_READ360SUMMARY) to populate the 360-degree view. When CRM sends a request for constituent information, CS generates 12 local requests to gather data for each section of the 360-degree view and feeds that data to the aggregation service, which then sends a single populated message back to CRM based on the user's security access in both CS and CRM. This process follows a synchronous model; the message and response is processed in real time, using request handlers that are configured on the Request Handlers page.

When the system runs PERSON_BASIC_SYNC, it creates a record in CRM for every constituent with an EMPLID in CS. The CRM consumer role is needed to access certain CRM constituent information for an ID. For constituents who did not complete the standard student life cycle, a consumer role may not have been created. For example, a donor who never attended as a student will have an ID created in CRM during the sync, but no role will be assigned. To assign the consumer role to an individual in CRM, see *PeopleSoft CRM Business Object Management,* "Defining Person Business Objects," Viewing and Updating Primary Person Information. Once you have added the consumer role to an ID, the ID appears in search results for components like the Constituent 360 Degree View.

Understanding Security

In the 360-degree constituent view pages, the CRM system honors CS security settings. For example, if a user chooses to view Financial Aid information but he does not have underlying access to the CS functional area, the data will not appear. For users to view all areas of the Higher Education Information portions of the 360-Degree View, they must have security access to the pages and components that feed the section. The following table describes how the information that is passed to CRM can be controlled:

Section Name	***Section Display Secured by***
Constituent Summary	Academic Institution Security
Checklists/Communications/Comments	3C Group Security
Recruiting	CRM system security
Admissions	Application Center Security
Transfer Credits	No row-level security view applied
Academics	Academic Institution Security, Institution/Campus Security, Institution/Career Security, Academic Program Security, Plan settings
Transcript Requests	Academic Institution Security, Transcript Type Security
Student Financials	Business Unit security
Financial Aid	Academic Institution Security, Security Views
Contributor Relations	Academic Institution Security, CR Business Unit Security
Affiliations	Academic Institution Security

In addition, **Security View** settings for each request handler defined on the Request Handlers page affect a user's view.

Understanding Request Handlers

CS system request handlers have a significant impact on the security of many components in the 360-Degree View, because they enable the setting of particular security views. There is one overall, externally available request handler for the "aggregation service" (SCC_CONSTITUENT), and then each of the components has its own internal request handler. This service interacts with CRM and serves as the front end to all the others, which gather the information for CRM internally in CS. Request handlers are defined on the Request Handlers page **(Set Up SACR > System Administration > Integrations > Request Handlers).** The *CRM for Higher Education Developer's Guide* in My Oracle Support (ID 1982671.1) contains more details about security.

Prerequisites

Setup is required in both the CS and CRM systems to enable the CRM 360-degree view. *PeopleSoft CRM for Higher Education* documents CRM setup requirements. Within the CS system, you must enable CRM integration on the SA Features page and set up data filtering parameters using the Configure Integrations component.

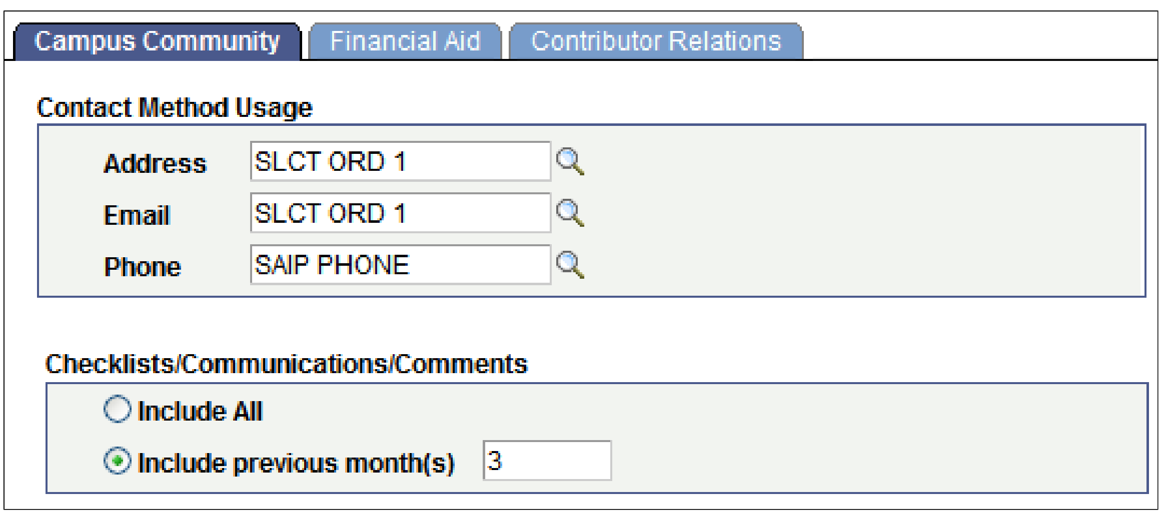
Pages Used to Configure the 360-Degree View

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Integrations - Campus Community	SCC_WSC_COMMUN	**Set Up SACR** > **System Administration** > **Integrations** > **Configure Integrations** > **Campus Community**	Define or limit the Campus Community data to be picked from CS for displaying in the CRM 360–degree view.
Configure Integrations - Financial Aid	SCC_WSC_FINANC	**Set Up SACR** > **System Administration** > **Integrations** > **Configure Integrations** > **Financial Aid**	Define or limit the Financial Aid data to be picked from CS for displaying in the CRM 360–degree view.
Configure Integrations - Contributor Relations	SCC_WSC_FINANC	**Set Up SACR** > **System Administration** > **Integrations** > **Configure Integrations** > **Financial Aid**	Define or limit the Contributor Relations data to be picked from CS for displaying in the CRM 360–degree view.

Configuring Campus Community Data Filters

Access the Campus Community page (**Set Up SACR** > **System Administration** > **Integrations** > **Configure Integrations** > **Campus Community**).

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



The fields on this page enable you to define the data that should be included in the EIPs that populate the Summary portion of the CRM 360-degree view.

Contact Method Usage

The **Address, Email,** and **Phone** fields define the order in which the system searches for and uses the associated data. Address and phone usage settings are defined on the Address Usage and Phone Usage pages in PeopleSoft Campus Community.

Checklists/Communications/Comments

A large volume of data pertaining to 3Cs may be available. Use these options to limit the data that should be sent to populate the CRM 360-degree view. You can either **Include All** data or data for the past few months. By entering a value for **Include previous month(s),** such as *3,* you limit the 3C data to the past 3 months. Three months is the recommended 3C period to avoid potential data relevance and performance issues; however, your institution should adjust this period according to its business processes.

Related Links

"Establishing Address Usages" (Campus Community Fundamentals)

"Establishing Phone Usages" (Campus Community Fundamentals)

Configuring Financial Aid Data Integration

Access the Financial Aid page (**Set Up SACR** > **System Administration** > **Integrations** > **Configure Integrations** > **Financial Aid**).

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

The fields on this page enable you to define the data that should be included in the EIPs that populate the Financial Aid portion of the CRM 360-degree view. That page displays one aid year at a time in the grid, and lists the current aid year first.

Select the option to **Include All** financial aid year data for a person in the message sent to CRM 360-degree view, or only data from **Selected Financial Aid Year(s).**

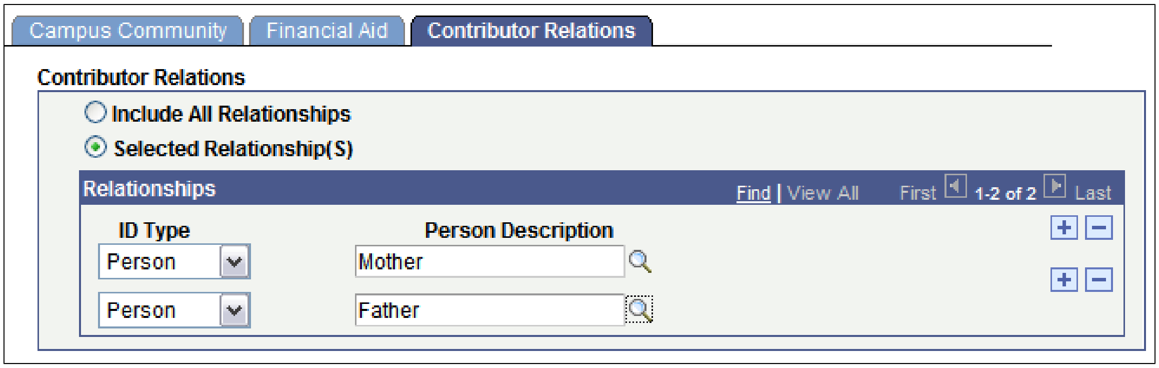
Related Links

"Establishing Aid Years" (Financial Aid)

Configuring Contributor Relations Data Integration

Access the Contributor Relations page (**Set Up SACR** > **System Administration** > **Integrations** > **Configure Integrations** > **Financial Aid**).

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



The fields on this page enable you to define Person/Org Relationship data that should be included in the EIPs that populate the Contributor Relations portion of the CRM 360-degree view. That part of the 360-degree view displays all summarized giving information for the relationship.

It is possible that a constituent may have relationships with other persons and organizations, and the default value on this page is to **Include All Relationships.** However, your institution may not want to include every relationship in the CRM 360-degree view. So, select a relationship option to define what relationships are applicable to be sent to CRM. If you choose **Selected Relationship(s),** then you must select the **ID Type** and **Person Description** for each selected relationship. Only those relationships selected here will be applicable for sending across to CRM 360-degree view. Selecting pertinent relationships only, such as parents or spouse, is recommended.

Related Links

"Establishing Relationships" (Contributor Relations)

Reviewing Configuration Scenarios

This section provides examples and sample step-by-step procedures for enabling and configuring:

- 360-degree view.
- EIPs.
- Test score post.

Configuring the 360-Degree View

To set up services filter data:

1. Select **Set Up SACR** > **System Administration** > **Integrations** > **Configure Integrations.**
2. In the Contact Method Usage group box , **Address** field, select *ADDR LAND.*

3. In the **Email** field, select *LAND&EMAIL.*

4. In the **Phone** field, select *SAIP PHONE.*

5. In the Checklists/Communications/Comments check box, select the *Include Previous Months* option and enter *3* in the adjacent box.

6. Click the Financial Aid tab.

7. In the Financial Aid group box, select the *Include All* option.

8. Click the Contributor Relations tab.

9. In the Contributor Relations group box, select the *Include All Relationships* option.

10. Click the **Save** button.

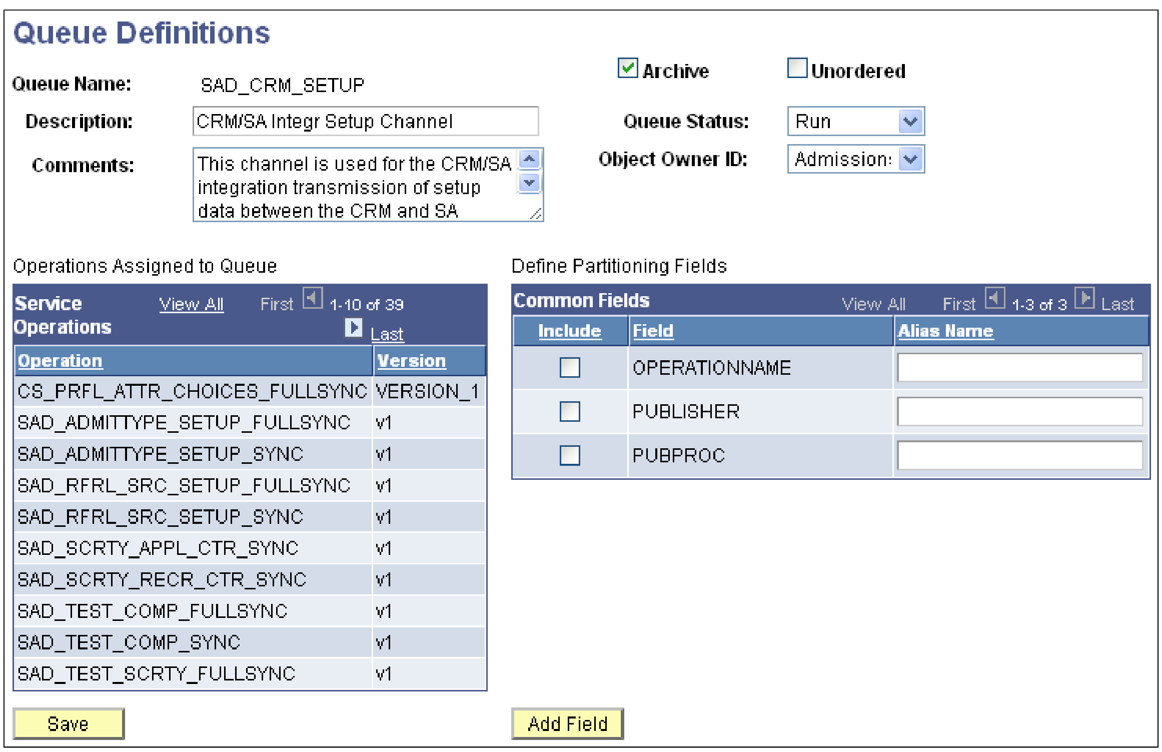
Configuring EIPs

To set up queues:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Queues.**

2. Change the **Queue Status** to *Run* for the following queues, if they are not already set: SAD_CRM_SETUP, SAD_CRM_DATA, PERSON_DATA.

This example illustrates the fields and controls on the Example of setup on Queue Definitions page. You can find definitions for the fields and controls later on this page.



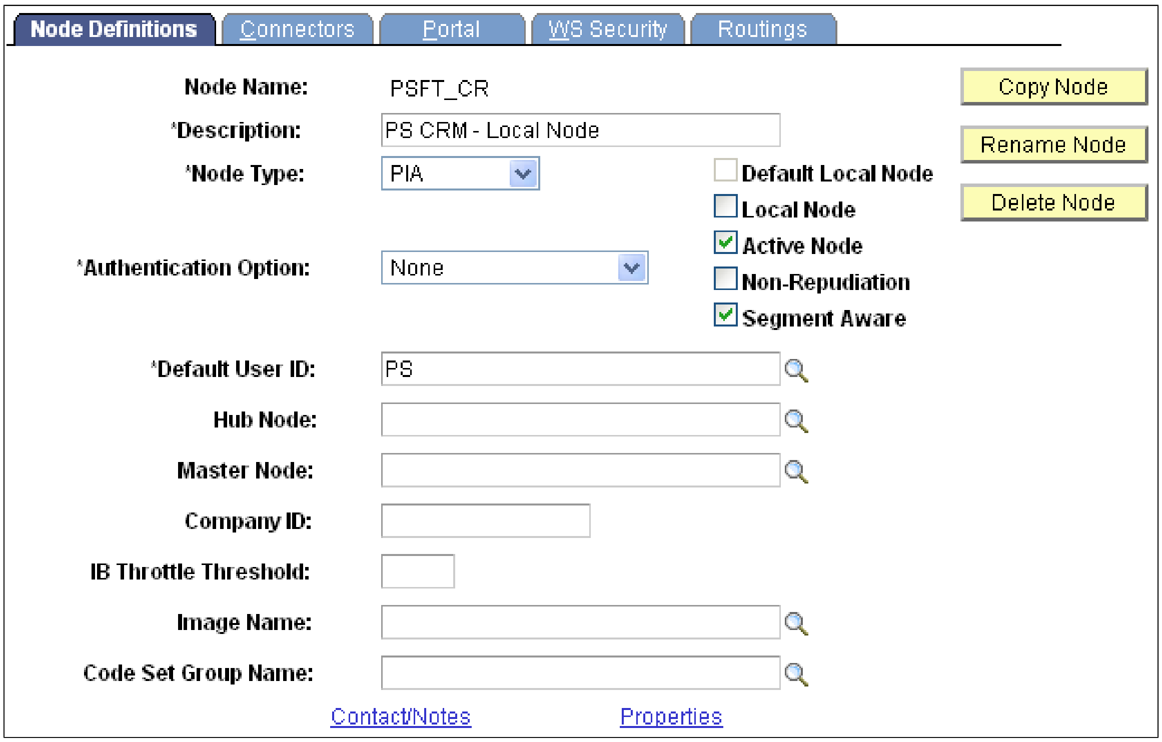
Configuring Test Score Posting

To manually set a node as segment aware and configure a node to handle segmented messages:

1. Select **PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes.**
2. Select the CRM node (PSFT_CR) with which to work and click the **Search** button.

   The Node Definitions page appears.
3. Select the **Segment Aware** check box.
4. Click the **Save** button.

This example illustrates the fields and controls on the Example of setup on Node Definitions page. You can find definitions for the fields and controls later on this page.



For further details, refer to the *CRM for Higher Education Developer's Guide* (ID 1982671.1) in My Oracle Support.

Chapter 32

Campus Solutions Application Diagnostic Plug-ins

Understanding Application Diagnostics

PeopleTools Diagnostic Framework provides an interface enabling you to execute queries designed to investigate application problems and present the data in a standardized format that you can then share with PeopleSoft's Global Support Center.

The diagnostic framework provides:

- Dynamic prompting, enabling you to restrict queries and include transactional data.
- Output in XML, in addition to HTML.
- Send functionality, enabling you to send the output directly to the email address of the GSC support analyst working with you.
- Support for rowset retrieval.

Campus Solutions has delivered a number of diagnostic plug-ins, which are product-specific queries, with this release. Updates are posted on My Oracle Support.

See *PeopleTools: Data Management*

Delivered Application Diagnostic Campus Solutions Plug-Ins

These tables list the diagnostic plug-ins delivered by product.

Academic Advisement

Plug-In Name and Description	*Required Parameters*	*Provides a diagnosis of...*
SAA_STUDENT_INFO: retrieves all data used to process a DPR for a student.	An employee ID is a required parameter for the diagnostic tool to return valid information.	The SAA_STUDENT_INFO application package retrieves the requirement terms from ACAD_PROG, ACAD_PLAN, and ACAD_SUBPLAN records for a student. It also retrieves the following current records for a student: • ACAD_PROG • ACAD_PLAN • ACAD_SUBPLAN • STDNT_ENRL • TRNS_EXTR_VW • TEST_EXTR_VW • OTHR_EXTR_VW The application package retrieves the following appropriate records for a student: • RG_GRP_TBL • RQ_GRP_DETL_TBL • RQ_MAIN_TBL • RQ_LINE_TBL • RQ_LN_DETL_TBL • CLST_MAIN_TBL • CLST_DETL_TBL

Campus Community

Plug-In Name and Description	*Required Parameters*	*Provides a diagnosis of...*
SCC_EMPLID_VALIDATN: retrieves all data needed to investigate problems creating a new emplid.	None	• Selects MAX Emplid from PERS_ DATA_EFFDT. • Selects EMPLID_LAST_EMPL from INSTALLATION. • Counts number of records in PERS _DATA_EFFDT with EMPLID of "NEW".
SCC_SEVIS_REG_EVENT: retrieves all data needed to investigate problems when registration events don't trigger for SEVIS students.	The following parameters are required for the diagnostic tool to return valid information: • EmplID of Student. • SEVIS School ID. • OprID from Batch Submission. • Run Control ID from Batch Submission.	• Queries I20_FORM to verify a records exists and displays "Y" if the value of SEV_FUNDING_ VERIFY is "Y". • Queries SEV_MST_ADDR to verify no inactive records for the student. • Queries SEV_MST_ADDR to verify no inactive records for the student. • Queries SEV_MST_REG to verify no inactive records for the student. • Verifies a valid row exists in RUNCTL_CCSEVCMP. • Verifies ASOF_DATE in RUNCTL _CCCMPTRM is less than today's date. • Verifies student has a record in SEV _MST_REG matching the term value in RUNCTL_CCCMPTRM. • Verifies student has a record in STDNT_CAR_TERM matching the term value in RUNCTL_ CCCMPTRM. • Verifies student has a record in STDNT_ENRL matching the term value in RUNCTL_CCCMPTRM.

Financial Aid

Plug-In Name and Description	*Required Parameters*	*Provides a diagnosis of...*
SFA_FA_TERM: retrieves all data needed to investigate problems creating new FA-Term records.	These are the parameters required for the diagnostic tool to return valid information. • Emplid of Student • Institution • Student Career • Term • Aid Year • Oprid	• Queries against STDNT_CAR_ TERM to get FA flags from that record. • Queries against STDNT_CAR_ TERM to get FA flags from that record. • Student's aid year activation. • FA Term setup for aid year/career. Queries FATRMP_CAR_TRM to verify the term is defined. • Gets values from FA Term Drivers Setup. Queries RUN_CTL_ FATDVRS for values. • Student's admissions and records activation and effective date. Queries STUDENT_AID to verify correct record exists. • Expected student's grad term. Queries ADM_APPL_PROG and ACAD_PROG for the student. • Gets Session Code, Session Code Census Date, FA Term Census Date and FA Term Locked flag. • SESSION_CODE and CENSUS _DT from SESSION_TBL, FA _CENSUS_DATE and LOCK_ FATERM from FATRMP_CAR_ TRM. • Displays FA_ELIGIBILITY and FA_STATS_CALC_REQ for all records in STDNT_CAR_TERM for the student. • Displays all records in STDNT_ FATU_DRV for the student.

Plug-In Name and Description	*Required Parameters*	*Provides a diagnosis of...*
SFA_PKG_DATA: retrieves all data needed to investigate problems creating FA packaging records.	These are the parameters required for the diagnostic tool to return valid information: • Emplid of Student • Institution • Student Career • Term • Aid Year • Oprid • Batch Sequence Number	• Data in PKG_BATCH_AWD, PKG_BATCH_DISB, STDNT_AWD_PKG, STDNT_PKG_DISB, STDNT_AWARDS, STDNT_AWRD_DISB. • Queries against PKG_BATCH_AWD, PKG_BATCH_DISB, STDNT_AWD_PKG, STDNT_PKG_DISB, STDNT_AWARDS, STDNT_AWRD_DISB for the student. • Temp packaging tables matching data in actual packaging tables.
SFA_PKG_DATA: retrieves all data needed to investigate problems creating FA packaging records. Continued.		• Data in DISB_SPLIT_CD, DISB_ID_SPLIT, DISB_PLAN_TBL, and DISB_ID_TBL. Queries against these tables for codes used when processing the student. • Data in STDNT_AGGR_LIFE and STDNT_AGGR_SCHL. Display totals from SFA_AGGR_BALANCE and EXPECTED_AWARD.

Student Financials

Plug-In Name and Description	*Additional Parameters*	*Provides a diagnosis of...*
SSF_PAYMENT: retrieves all data needed to investigate problems with posting payments in Student Financials.	• Business Unit • Emplid of Student • Item Number • Payment ID Number	• Queries against PS_PAYMENTS _TBL to display the CHARGE_ PRIORITY and STRM. • Queries against ITEM_SF to get the item term for the charge. • Queries against Charge Priority Tree to retrieve the SETID, TREE NAME, and TREE NODE for the charge priority. • Queries against the PMT_CHRG_ PRIOR and PMT_CHRG_TBL to get the nodes in the charge priority list. • Queries against the PMT_CHRG_ PRIOR and PMT_CHRG_TBL to get the pay future term, pay prior term, and pay future year flags. • Queries against ITEM_SF to retrieve a payment's unpaid balance. • Queries against ITEM_SF to retrieve a charge's unpaid balance.

Plug-In Name and Description	***Additional Parameters***	***Provides a diagnosis of...***
SSF_REFUNDING: retrieves all data needed to investigate problems with refunding a charge.	• Business Unit • Emplid of Student • Item Number • Payment ID Number	• Queries against ITEM_SF to get the item's outstanding balance, EFFDT, number of days encumbered, earning code if a refund, type of payment if a refund. • Queries against the setup table to determine the maximum and minimum refund amount, determine if debit balances are allowed to be refunded, determine if item type is marked as refundable and if a paygroup is associated with it. • Queries POSTED_DATE, PAYMENT_METHOD from PAYMENT_TBL to determine the posted date and if it is a credit card transaction. • Queries ACCOUNT_BALANCE from ACCOUNT_TOT_VW for the student's overall balance.

Chapter 33

Equation Engine Programmer's Guide

Understanding Equation Engine

Important! Financial Aid Notification (FAN) letter 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)

Oracle Corporation provides the PeopleSoft Equation Engine as a means for you to specify rules or equations as part of your business process. Equation Engine works best when you can specify an IF-THEN-ELSE validation resulting from a single call to an equation. For example, you may want to specify selection criteria by emplID or obtain a single number, string, or Boolean operator for that emplID.

The new version of the Equation Engine extends the capabilities of the original Equation Processor by adding looping and other constructs. It now can read any table for which you have security access and can perform various arithmetic operations and external call subroutines. In addition, security was added to ensure that control can be allocated based on your need and job function, which determine whether you need the ability to add, use, view, and modify equations, tables, and external routines.

We added new syntax to enable you to perform mass actions—such as inserting, deleting, and updating rows in database tables—against the database using a single statement.

This section discusses:

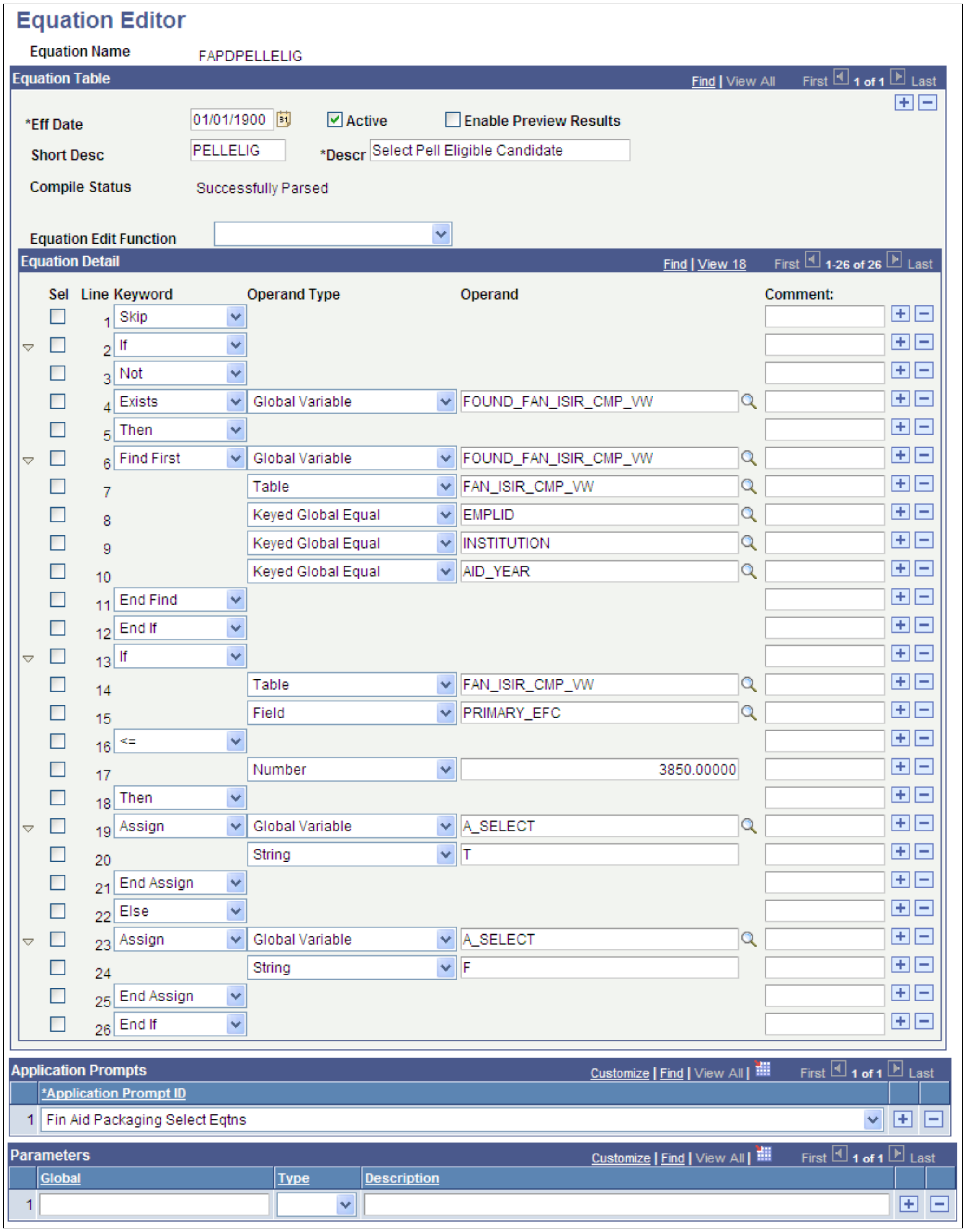
- Online usage
- Architecture
- Language constructs
- Keyword syntax
- Basic language syntax

Online Usage

You use the Equation Editor page to enter information about an equation. You can compile, test, view in XML format, and print equations; the system displays the compile status of the equation. You can also create, edit, and delete the contents of equations. The equation is divided into three main sections: Equation Keyword, Operand Type, and Operand. You use various combinations of these main sections to define and create equations.

Access the Equation Editor page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Editor**).

This example illustrates the fields and controls on the Equation Editor page, FAPDPELLELIG example. You can find definitions for the fields and controls later on this page.



Use the **Sel** (select) check boxes to select the lines to be affected by the Equation Edit function. Use the **Comment** fields to enter comments about an equation lines. Comments are information only.

To edit an equation, after you select a **Sel** check box, select one of the following options from the **Equation Edit Function** drop-down list box:

- *Collapse Statements*
- *Compile*

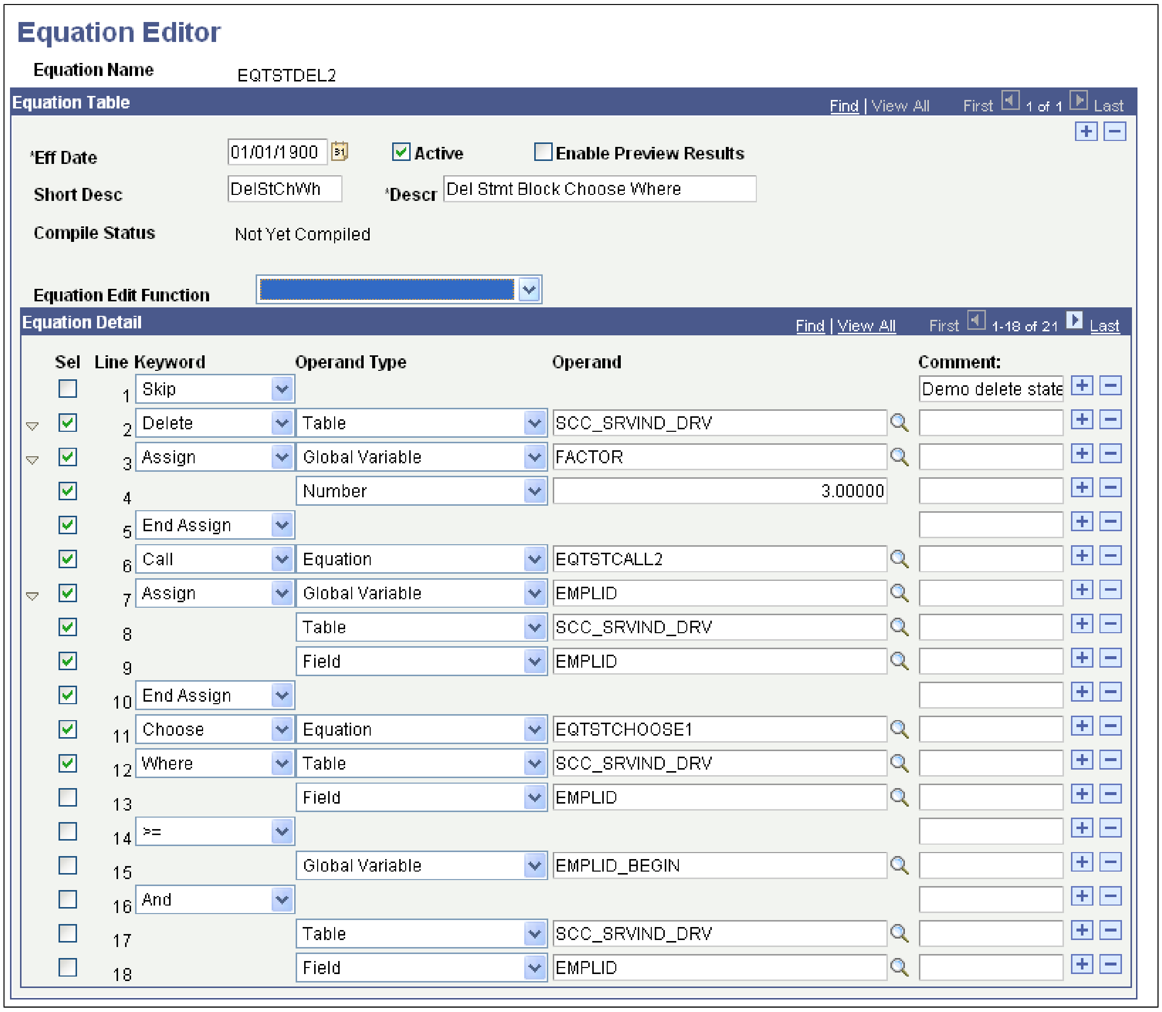
- *Copy and Append to Clipboard*
- *Copy to Clipboard*
- *Cut and Append to Clipboard*
- *Cut to Clipboard*
- *Deselect All*
- *Expand Statements*
- *Paste After row*
- *Paste Before row*
- *Print*
- *Select All*
- *Select all between checks*
- *Test*
- *View in XML Format*

Example of the Select All Between Checks Function

On the Equation Editor page, select the **Sel** check boxes for lines 2 and 12.

From the **Equation Edit Function** drop-down list box, select *Select All Between Checks.* When you click the *Select All Between Checks* option, the following page displays the selected check boxes for lines 2 through 12.

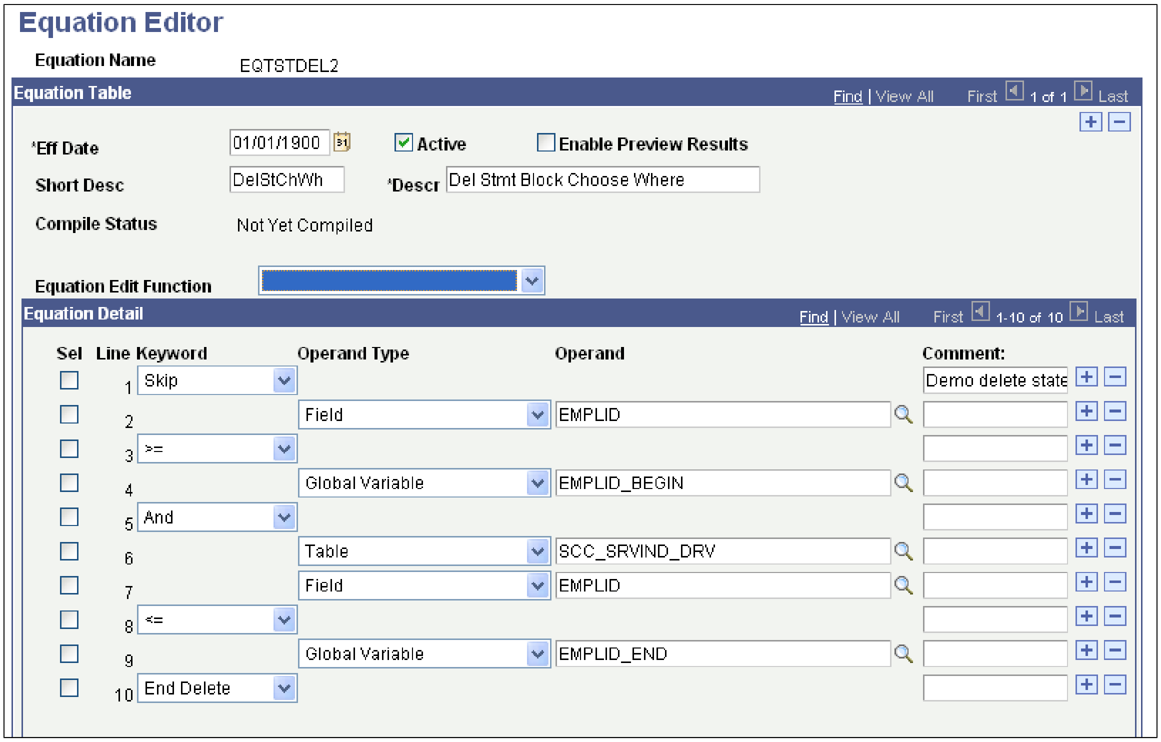
This example illustrates the fields and controls on the Example for the Select All Between Checks option. You can find definitions for the fields and controls later on this page.



Example of the Cut to Clipboard Function

From the **Equation Edit Function** drop-down list box, select *Cut to Clipboard* to copy the contents to the clipboard for later use. The selected lines are removed, as shown in the following example.

This example illustrates the fields and controls on the Example for the Cut to Clipboard option. You can find definitions for the fields and controls later on this page.

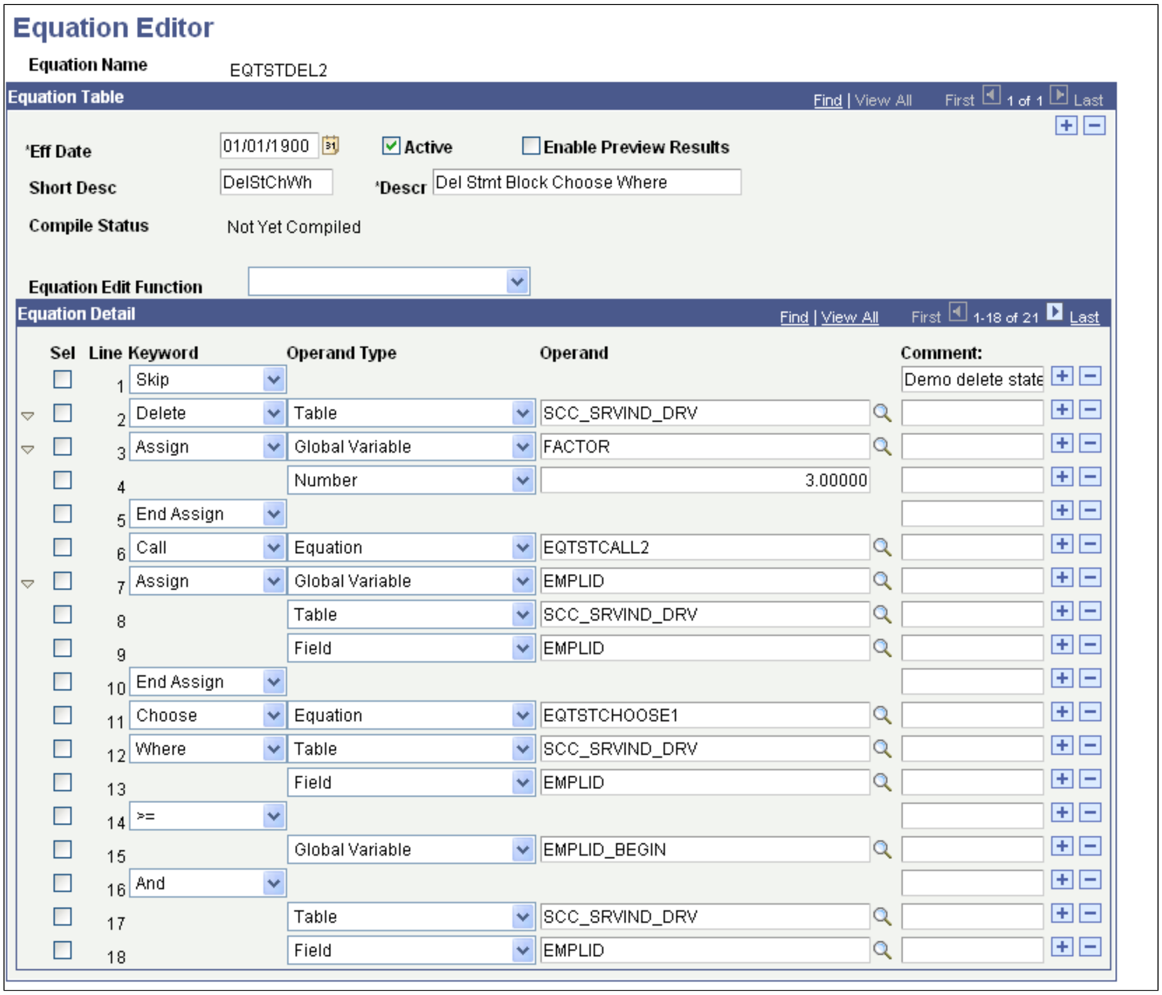


Example of the Paste After Row Function

Select line 1 from the **Sel** check boxes.

From the **Equation Edit Function** drop-down list box, select *Paste After row.* Lines 2 through 12 are added from the clipboard, as shown in the following example:

This example illustrates the fields and controls on the Example for the Paste After Row option. You can find definitions for the fields and controls later on this page.



Compile Function

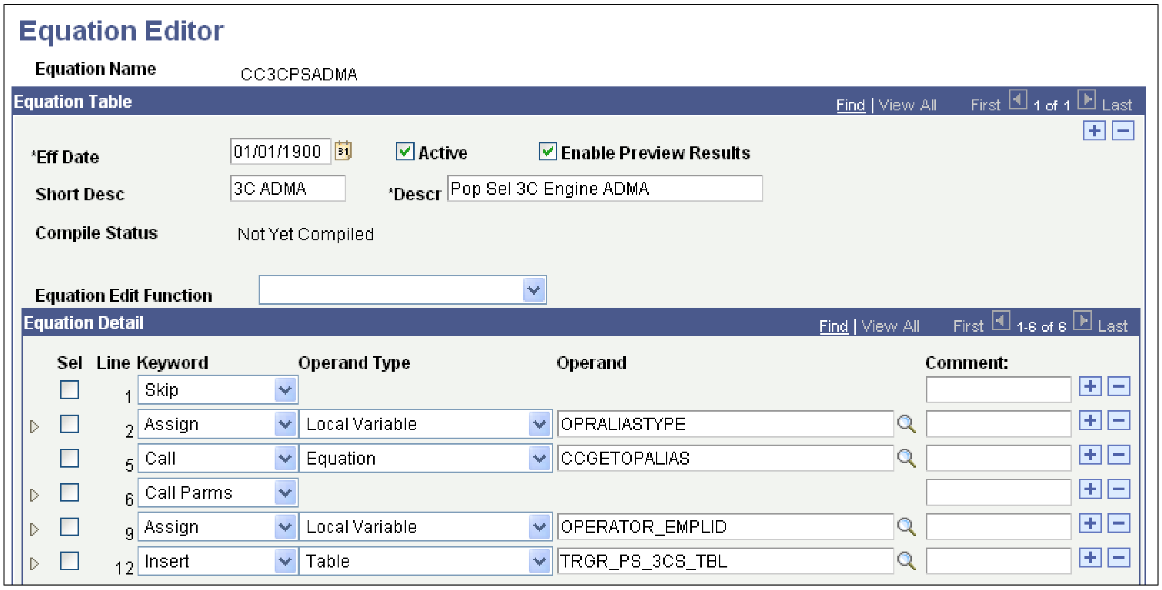
From the **Equation Edit Function** drop-down list box, select *Compile* to check the syntax of the equation and to generate pseudo-code for the equation. You do not need to compile an equation; because the system compiles it for you when you run the equation. if you choose to compile an equation, you should compile the equation immediately after modifying it to check for syntax errors.

Example of Using the Expand and Collapse Buttons

The **Equation Edit Function** drop-down list box contains collapse and expand functions. To use them, you must first select the lines to be collapsed or expanded; then, you perform the function. For example, when you perform the *Select All* edit function followed by the *Collapse Statements* edit function, all collapsible statements in the equation are collapsed.

This is an example of the equation after all statements are collapsed:

This example illustrates the fields and controls on the Example for the Collapse Statements option. You can find definitions for the fields and controls later on this page.



Example of View In XML Format

When you select the *View In XML Format* edit function, the equation appears as an XML document in your browser. Because no style is associated with the XML document, the equation is presented as a document tree, in which the statements are indented and collapsible. The equation cannot be edited from the XML view of the equation.

This example illustrates the fields and controls on the Example EQTSTDEL2 in XML format. You can find definitions for the fields and controls later on this page.

```
- <EQUATION>
    <EQUATIONNAME>EQTSTDEL2</EQUATIONNAME>
    <SKIP />
    <COMMENT>Demo delete statement.</COMMENT>
  - <DELETE>
      <TABLE>SCC_SRVIND_DRV</TABLE>
    - <ASSIGN>
        <GLOBAL>FACTOR</GLOBAL>
        3
      </ASSIGN>
      <CALL />
      <EQTN>EQTSTCALL2</EQTN>
    - <ASSIGN>
        <GLOBAL>EMPLID</GLOBAL>
        <TABLE>SCC_SRVIND_DRV</TABLE>
        <FIELD>EMPLID</FIELD>
      </ASSIGN>
      <CHOOSE />
      <EQTN>EQTSTCHOOSE1</EQTN>
      <WHERE />
      <TABLE>SCC_SRVIND_DRV</TABLE>
      <FIELD>EMPLID</FIELD>
      >=
      <GLOBAL>EMPLID_BEGIN</GLOBAL>
      <AND />
      <TABLE>SCC_SRVIND_DRV</TABLE>
      <FIELD>EMPLID</FIELD>
      <=
      <GLOBAL>EMPLID_END</GLOBAL>
    </DELETE>
  </EQUATION>
```

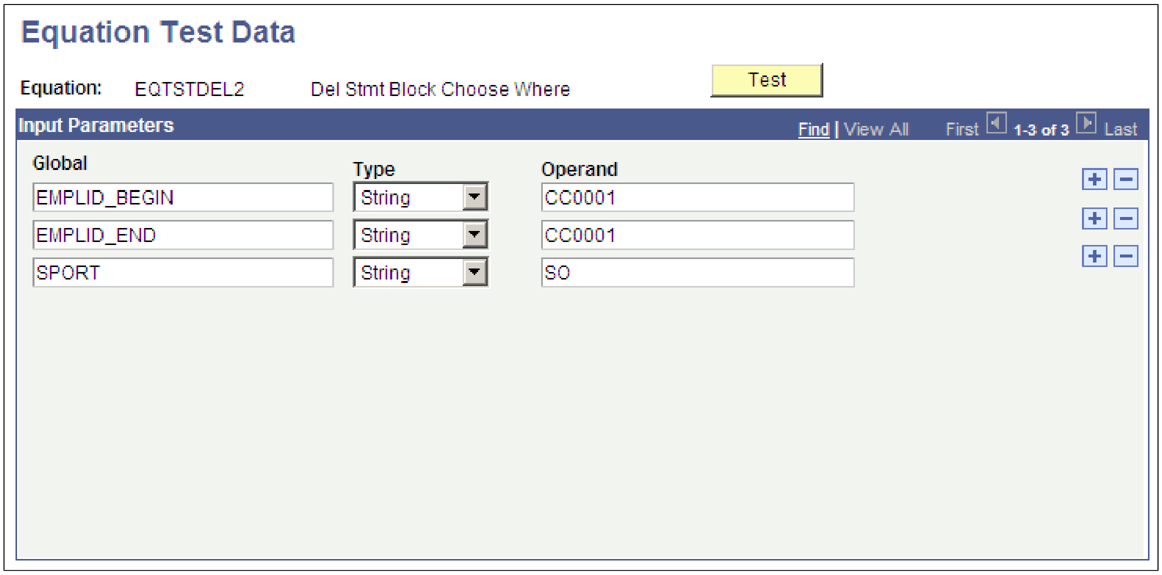
Testing Equations

To test the equation, you may need to set up test data. In the previous example, the function of the equation was to add a few numbers together. No test data was needed because no global variables were needed. However, to test an equation that references keys in the table, passes global variables, or both you must provide the equation with test data.

To define and enter test data, go to the Equation Test Data page and define the name of the variable, its type, and its operand.

Access the Equation Test Data page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Test Data**).

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

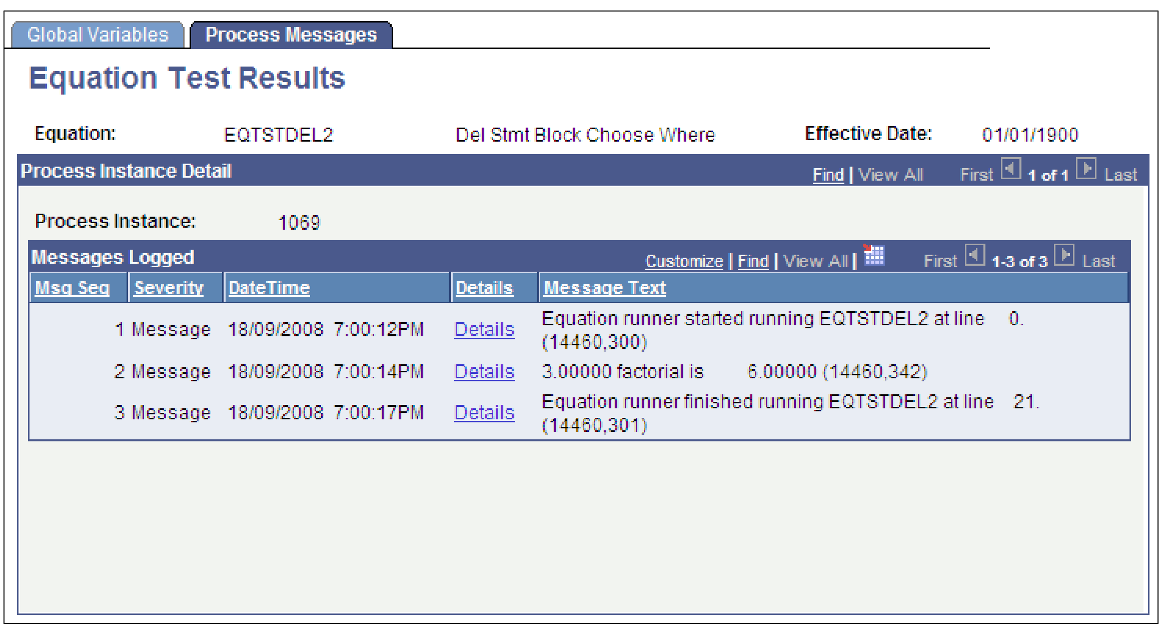


After you define the necessary variables and enter data on the Equation Test Data page, click the **Test** button.

Note: You can also run a test from the Equation Editor by selecting *Test* from the **Equation Edit Function** drop-down list box.

When you click the **Test** button, the system displays the Equation Test Results, Process Messages tab:

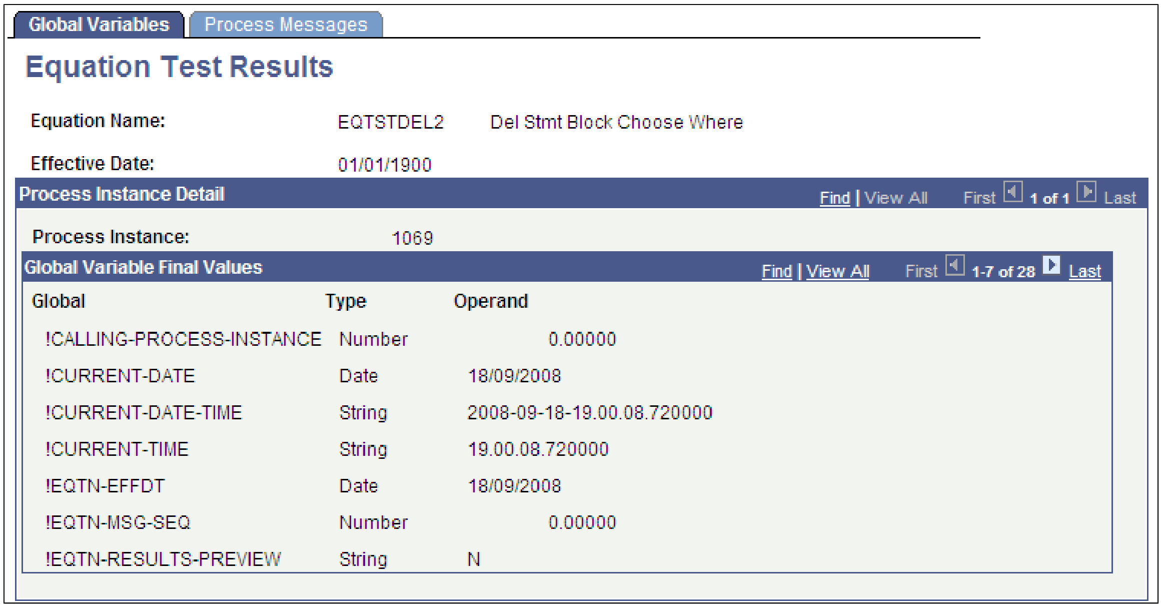
This example illustrates the fields and controls on the Equation Test Results page, Process Message tab. You can find definitions for the fields and controls later on this page.



This tab displays the messages associated with the equation test run.

The Equation Test Results, Global Variables tab displays the global variables used within the current equation run:

This example illustrates the fields and controls on the Equation Test Results page, Global Variables tab. You can find definitions for the fields and controls later on this page.



The *Print* option in the **Equation Edit** function on the Equation Editor page enables you to print equations in a Crystal report format. When you select the *Print* option, the Equation Print page displays where you are required to enter a run control ID.

Running the subsequent process yields a report that looks like this:

This example illustrates the fields and controls on the EQTSTDEL2 Report. You can find definitions for the fields and controls later on this page.

FA753: Equation Report

Line Number	Keyword	Operand Type	Operand	Comment
Equation	EQTSTDEL2	Del Stmt Block Choose Where		
	Eff Date	1/1/1900	**Print Date**	11/17/2008
1	Skip			Demo delete statement.
2	Delete	Table	SCC_SRVIND_DRV	
3	Assign	Global Variable	FACTOR	
4		Number	3.00000	
5	End Assign			
6	Call	Equation	EQTSTCALL2	
7	Assign	Global Variable	EMPLID	
8		Table	SCC_SRVIND_DRV	
9		Field	EMPLID	
10	End Assign			
11	Choose	Equation	EQTSTCHOOSE1	
12	Where	Table	SCC_SRVIND_DRV	
13		Field	EMPLID	
14	>=			
15		Global Variable	EMPLID_BEGIN	
16	And			
17		Table	SCC_SRVIND_DRV	
18		Field	EMPLID	
19	<=			
20		Global Variable	EMPLID_END	

Page 1 of 2

Line Number	Keyword	Operand Type	Operand	Comment
Equation	EQTSTDEL2	Del Stmt Block Choose Where		
	Eff Date	1/1/1900	**Print Date**	11/17/2008
21	End Delete			

Architecture

The architectural changes in the current version of the Equation Engine are divided into two components: the Compiler and the Interpreter. The Compiler transforms the equation into pseudo-code (a pcode different from PeopleTools pcode), that is a type of platform-independent, low-level assembly code. The Interpreter reads the pcode and executes the equation directly. This method enables you to validate the syntax without running the equation. It also simplifies the logic of the programs.

Technical Notes

The architectural approach is a left-to-right look-ahead parser. Context sensitivity was pushed down to the lexical analyzer to make the parsing algorithm simpler.

Standard compiler design uses the driving routine as the parser. The parser makes calls to the lexical analyzer to retrieve units of logical language, called *Tokens*. It builds a parse tree, which is an internal representation of the structure of the program. It then reduces the parsing stack using the parse tree. For example, an if-then-else-end-if construct would be reduced to an if statement. Some of the reductions trigger calls to the object code generator, which generates the target language to be emitted. In this instance, the compiler output is the pcode. The design of the interpreter is simplified because the pcode is low-level.

Statement constructs were designed to end with *END-XXXX* phrases so that the parsing table state transitions are from top to bottom. When the equation is compiled by means of the compile equation edit function, additional up-front syntax checks are performed to provide more compile messages with more clarity about what is syntactically wrong with the equation. Additionally, if one of the more complicated statements has a syntax error, then a message appears showing the language syntax for that statement.

Language Constructs

Equation Editor uses the language constructs discussed in the following topics.

Keywords

Keyword usage is mostly self-explanatory. Complex keywords will be explained later in the context of their syntactical constructs. These are the keywords:

- (
-)
- *
- +
- -
- /
- <
- <=
- <>
- =
- >
- >=
- And
- Assign

- Call
- Call Parms
- Choose
- Delete
- Else
- Else If
- End Assign
- End Call Parms
- End Delete
- End Find
- End If
- End Insert
- End Loop
- End Message
- End Restore
- End Save
- End Update
- Exists
- Exit Loop
- Find First
- Find Next
- From
- Halt
- If
- Insert
- Into
- Loop
- Message
- Not
- Or

- Restore
- Return
- Save
- Set
- Skip
- Then
- Trace
- Update
- Where

Global and Local Variables

Two types of variables are available in the Equation Engine: global and local. Data is passed to the Equation Engine by means of the global variable array or a process instance of the global variable tables that is defined by the Equation Test Data page or a calling program. Global variables are visible and can be referenced by any equation running or called. Local variables are visible only to the currently running equation.

Local and global variables can have a *stem* qualification. *Stems* are similar to arrays except that they have more versatility and are unbounded. You can assign a variable a name that ends with a period (.) to a default value (for example, DOGOWNER. = "unknown"), and then reference a subscript of that stem. If the subscript was not initialized with a value, then it will pick up the default value (for example, DOGOWNER.X has the value "unknown").

Stems are more versatile than arrays because the bounds of an array must be declared, but stems have no bounds to be declared and the subscripts do not have to be numeric. Therefore, you can have a subscript value of "Fido" instead of 7 (for example, Assign X = "Fido" and then Assign DOGOWNER.X = "Joe"). This construct not only allows a pseudo array processing capability, it also allows a pseudo pointer capability (for example, NODE.LEFT and NODE.RIGHT).

Read-only (system) variable names always begin with an exclamation mark.

Depending on which application is invoking the equation, different global variables may be assumed to be passed into the equation and different global variables (or none) are expected to be returned from the equation.

Global Variables Always Passed in for All Applications

The following global variables are always passed in:

- !CURRENT-DATE
- !CURRENT-DATE-TIME
- !CURRENT-TIME
- !EQUATION-NAME

- !PROCESS-INSTANCE
- !RUN-CNTL-ID
- OPRID (always read-only, FIND tests are forced to equality)
- PROCESS-INSTANCE (passed in)
- PROCESS_INSTANCE (actually used)
- RUN_CNTL_ID

Global Variables Passed in for the Forms Engine Financial Aid Award Notification Letter (FEFANLTR)

The following global variables are passed in:

FANLTR_SEQ

These global variables enable the equation to read the table RUNCNTL_FAN_SEQ, which provides these fields:

- **INSTITUTION**
- **AID_YEAR**
- **PKG_AWARD_PERIOD**

The equation can then assign global or local variables to these fields in order to loop through reading the table FAN_AWD_SEL_VW to determine whether or not to select an EMPLID. If the EMPLID is to be selected, the equation calls the SQL FANLTR_SELECT_STUDENT, passing in the EMPLID.

Note: No global variables are returned for FEFANLTR.

Global Variables Passed in for Financial Aid Packaging

The following global variables are passed in:

- EMPLID
- INSTITUTION
- AID_YEAR
- ACAD_CAREER
- AWARD_PERIOD
- I_TRGT_FED_RMNEED
- I_TRGT_INST_RMNEED
- I_TRUE_FED_RMNEED
- I_INST_RMNEED
- I_LAST_AWD_ATM

- I_TOTAL_AWD_AMT
- WORK_FIELD_CHAR_01 through 05 (These global variables retain their values between equation calls. Initially, they are blank.)
- WORK_FIELD_NUM_01 through 05 (These global variables retain their values between equation calls. Initially, they are zero.)
- A_SELECT (initially blank)
- A_AMOUNT (initially zero)

The following global variables are examined upon return from the equation:

- A_SELECT (either "T" or "F", where "T" causes the student to be selected only for equations with the application prompt type of "Fin Aid Packaging Select Eqtns")
- A_AMOUNT (numeric dollar amount to be returned only for equations with the application prompt type of "Fin Aid Packaging Amount Eqtns")

Global Variables Passed in for Student Financials Tuition Calculation

The following global variables are passed in:

- EMPLID
- INSTITUTION
- ACAD_CAREER
- STRM
- BUSINESS_UNIT
- BILLING_CAREER
- STDNT_CAR_NBR
- A_SELECT (initially blank)
- A_AMOUNT (initially zero)
- CLASS_NBR
- CRSE_ID
- ENROL
- ACTN_RSN_LAST
- TRANS_DATE
- TRANS_TIME

These global variables are examined upon return from the equation:

- A_SELECT (either "Y" or "N"; only the first character of the string is examined, but only for equations with the application prompt type of "Stdnt Fin Tuition Select Eqtns")

- A_AMOUNT (dollar amount to be returned, but only for equations with the application prompt type of "Stdnt Fin Tuition Amount Eqtns")

Global Variable Passed in for CommonLine and Common Record CommonLine Loan Validation

The global variable LN_ACTION_STATUS (initially "O" for OK) is passed in.

The following records are already fetched, and you can reference their fields:

- LN_EDIT_RUN_VW (for CL4 only)
- SFA_CRCEDRUN_VW (for CRC only)
- LOAN_ORIGNATN
- LN_TYPE_TBL
- LN_CL_PNOTE_VW (for CL4 only)
- SFA_CRC_PNOTE (for CRC only)
- LN_DEST_CATG_VW (for CL4 only)
- SFA_CRC_DCAT_VW (for CRC only)

The edit equation should set this global variable:

LN_ACTION_STATUS (looks for "O" for OK, or for "F" for Failed to pass the edit)

Every edit calls FA_EDGETDEST (CL4) or FACEDGETDEST (CRC), which sets the global DEST_ACTV. Next, the equation must test if the value is "Y" and if not, then return; otherwise, if the edit finds an error, it calls equation FA_EDLOGERR (CL4) or FACEDLOGERR (CRC), passing it the EQUATION_NAME local variable.

Global Variables Passed in for CommonLine and Common Record CommonLine Loan Hold/Release Processing

The following global variables are passed in:

- AID_YEAR
- EMPLID
- INSTITUTION
- STRM
- TABLE_ID (always "1")
- LOAN_TYPE
- LN_APPL_SEQ
- DISBURSEMENT_ID
- ITEM_TYPE

- RESULT (initially blank)
- HR_MSG_SET_NBR
- HR_MSG_NBR

These global variables are examined upon return from the equation:

- RESULT (either "PASS" or "FAILED")
- HR_MSG_SET_NBR and HR_MSG_NBR (string numeric Hold/Release message set number and message number are examined only if RESULT is "FAILED")

Global Variable Passed in for Population Selection

This global variable is passed in:

!CALLING-PROCESS-INSTANCE

No global variables are expected upon return; however, rows may be inserted into the target table.

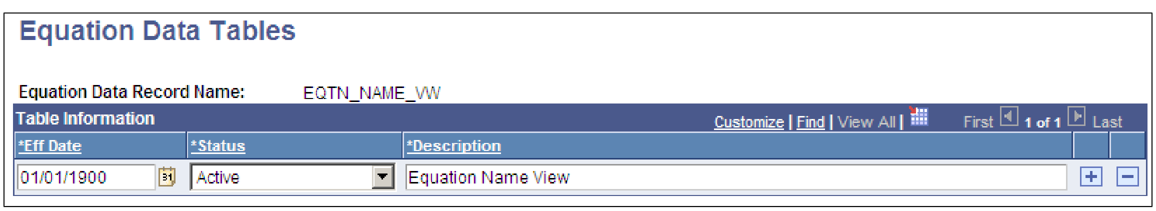
Note: If a local or global variable does not have an assigned value when it is referenced, then the Equation Engine gives a runtime error. See the EXISTS keyword for more details.

Tables and Fields

You can read and use the table and fields by defining the tables to be used in the Equation Data Tables page.

Access the Equation Data Tables page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation Data Tables**).

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



If you reference a table-field but that table has not been read, then an implicit read will be performed with the assumption that the global variables are defined the same as the key to that table (for example, EMPLID, INSTITUTION, STRM, and so on). After the table is read, the first value of the read will be placed in that field.

Runtime Errors

If a variable is referenced but it has not been assigned a value, then a runtime error will occur. Also, if a table field is referenced and the fetch count is zero (no rows found), then a runtime error will also occur. One way of avoiding this error is to use the *EXISTS* keyword to determine whether the field or variable had a value and to either set a default value or issue a modified message and halt. This situation might occur if you call another equation that expects a local variable to be passed.

Keyword Syntax

The maximum number of lines in an equation is 10,000.

Note: A truth value has an arithmetic value of zero for FALSE, and any other value is TRUE.

Logical Operators

Logical operators AND, OR, and NOT are used within an IF statement.

Syntax

<Condition1> <Logical Operator> <Condition2>

Syntax

NOT <Condition>

Relational Operators

Relational operators: <, <=, =, >=, >, <>

Relational operators compare two expressions and yield a truth value. Use parentheses to group expressions and to enhance readability.

Syntax

<Expression1> <Relational Operator> <Expression2>

Arithmetic Operators

Arithmetic operators: +, -, *, /

Arithmetic operators apply to two expressions and yield an arithmetic result. Use parentheses to group expressions and to enhance readability.

Syntax

<Expression1> <Arithmetic Operator> <Expression2>

If rounding or truncation to an integer is necessary, then a call must be made to an external subroutine or equation (for example, the "ROUND" equation) that handles the task.

ASSIGN

Keywords: ASSIGN and END ASSIGN

The ASSIGN statement enables you to assign a value to either a local or a global variable. Every ASSIGN statement must be concluded with an END ASSIGN keyword.

Syntax

ASSIGN <Local or Global> <Variable Name> <Expression> END ASSIGN

Note: Local variables exist and can be referenced only within the context of the current equation, but global variables exist for the duration of the Equation Engine run. A global variable set in one equation can be referenced within a called equation and vice versa.

CALL

Keywords: CALL, CALL PARMS, and END CALL PARMS

The CALL statement enables an equation to call another equation, a callable SQL, or an external subroutine.

Syntax

This table lists examples of syntax for the keywords CALL, CALL PARMS, and END CALL PARMS:

Equation Keyword	***Operand Type***	***Operand***
CALL	<routine type>	<routine name>
CALL PARMS		
	LOCAL	<variable name>}...
END CALL PARMS		

The CALL PARMS statement applies only to calling other equations or calling SQL. The types of routines are defined as equations, external subroutines, and SQL. You do not pass call parameters to external subroutines. To pass parameters to and from external subroutines, you must use global variables.

To use the Application Engine, you must call the Equation Engine from the Application Engine because the COBOL call to Application Engine is not supported.

For equation calls, the list of local variable names in the parameter list and their values are copied as separate local variables into the called equation. Local variables changed within the called equation are not changed upon the return to the calling equation. To pass a value back to a calling equation, the value must be returned by means of a global variable. Any returned global variable name should begin with the called equation name. If only one value is returned, the name should be <equation name>*_RESULT*. If you are returning a set of values, you can set the values into a global stem to encapsulate the result.

Equations can call themselves recursively; however, the maximum depth of equation call nesting is set at 1,000 calls. If your design requirements exceed the set amount, you must use a loop.

For SQL calls, the SQLID must exist in the Equation SQL setup table.

Access the Equation Callable SQL page (**Set Up SACR** > **Common Definitions** > **Equation Engine** > **Equation SQL Routines).**).

The security for SQL calls is controlled through the operator alias type of EQS.

Note: You can use CALL SQL for updates, inserts, deletes, or small row retrieval selects (<1000), but use FIND statements instead of calling SQL with selects whenever possible.

CALL parameter order

The call parameter requires this order when calling a SQL:

Return code,

SQL row count,

Bind variable 1,

Bind variable 2,

.

Bind variable n,

Select variable 1,

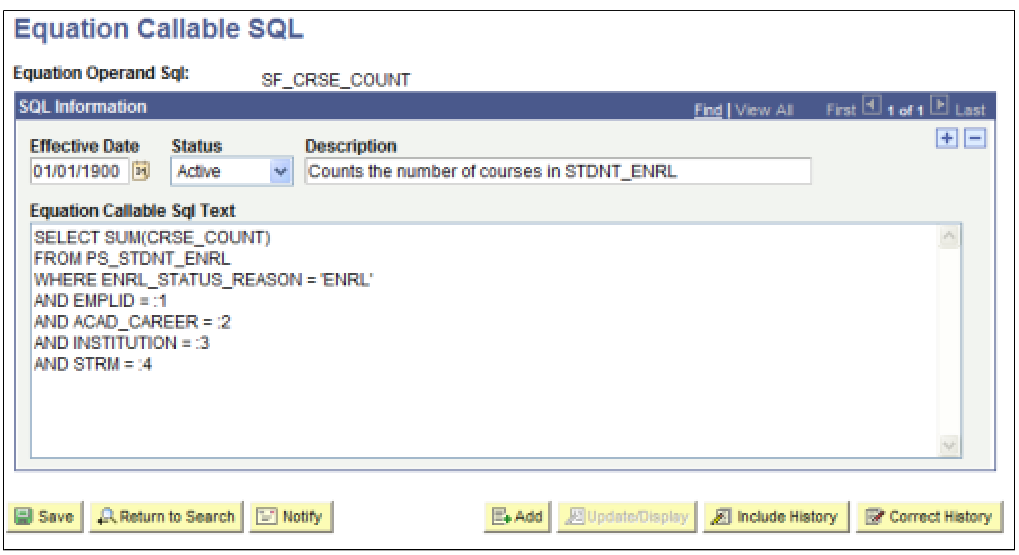
Select variable 2,

.

Select variable n,

This is an example of a Call SQL Setup:

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



All of the call parameters for SQL must be local variables. Global variables are not permitted. The select variables, if any, are updated by the call and are passed back to the calling equation, which differs from the effect of calling another equation and passing the local variables. If an equation modifies a passed local variable, that change is not reflected upon return to the calling program. However, when you call an SQL, the return code, SQL row count, and all of the select variables are modified by the call upon return from that called SQL.

Select variables are mapped to call parameters after the bind variables are mapped. The select variables must be stems to handle multiple rows of output (for example, EMPLID.1, EMPLID.2, and so on). Remember that a stem variable ends with a period and behaves similarly to an array.

DELETE

Keywords: DELETE, CHOOSE, WHERE, and END DELETE

Syntax

The following table shows examples of syntax for the keywords DELETE, CHOOSE, WHERE, and END DELETE:

Equation Keyword	***Operand Type***	***Operand***
DELETE	TABLE	<table name>
<statement block>		
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	
END DELETE		

This statement deletes rows from the specified table, limited to the <where expression> evaluating to true (if it is supplied), and also limited to the choose equation (if it is supplied) returning a true value for each row.

<table name> is the name of a table to which the user has Equation Engine (EE) write authority.

<statement block> is any set of equation statements, except not DELETE, INSERT, nor UPDATE. Typically, if any statements exist , they are ASSIGN statements setting global variables that will be used within the CHOOSE equation, if it is specified.

<where expression> is passed to the database when you select which rows to delete. The database returns the resultant rowset to the delete statement. If no where clause is specified, then all rows in the table are processed. The where clause may mention table-fields from the table operand of the delete keyword as well as any other table to which the user has EE read authority. The other tables, if mentioned, do not get rows delete, but rather may be used to limit which rows will be deleted by joining to the table in which rows are being deleted.

CHOOSE clause is optional and if specified will cause EE to call the choose equation once for each row in the rowset to be processed. Typically, any necessary global variables needed by the choose equation to do its function were set within the aforementioned <statement block>. After calling the choose equation, the choose clause will first look to see if there is a global variable with the same name as the choose equation name. If there is, then it will inspect it for a value of the number zero, which it will interpret as a false condition. Any other value is a true condition. If a true condition is returned, then the row is selected for processing. If it does not find the global variable with the same name as the choose equation name, then it will look for the global variable named A_SELECT. If a value is set for A_SELECT, it can have one the following values, which will indicate a true condition: T, TRUE, t, true, Y, YES, y, or yes. Any other value is considered to be a false condition.

EXISTS

Keyword: EXISTS

The EXISTS statement tests to determine whether a variable exists or whether any rows were returned when the EXISTS statement is applied against a table. It cannot be used to validate field names.

Syntax

This table shows example syntax for the keyword EXISTS:

Equation Keyword	***Operand Type***	***Operand***
EXISTS	<object type>	<object name>

<object type> is a local variable, global variable, or table name.

It returns a truth value and is typically used within an IF statement. It is commonly used to validate variables or tables prior to its usage to avoid runtime errors. If the variable has not been initialized, then the calling program must set default values to variables.

Example:

If you establish an equation (COMPUTE_ANGLE) that will be called by other equations, it requires the following parameters to be passed:

- XROW
- YROW
- DISTANCE

The COMPUTE_ANGLE tests to make sure XROW, YROW, and DISTANCE exist. If they do not, then variables can be set to default values or you can return a message to the calling equation.

When referencing table fields, the EXISTS statement determines whether a row has been selected for a given table name using either an implicit or explicit FIND statement.

FIND

Keywords: FIND FIRST, FIND NEXT, and END FIND

The FIND FIRST keyword positions the equation in the first row of the specified table for the given key values and key relational operators. The FIND NEXT keyword moves to the next row within that previously specified set of key values and key relational operators. If you need to process multiple rows of data within a single call to an equation, you should use a FIND FIRST followed by a LOOP statement that contains a FIND NEXT near the end of the statement. Test the find success variable to determine when to exit the loop.

Note: An implicit FIND is performed when a field of a table is referenced and no FIND FIRST was previously issued. In the implicit FIND, all relational operators are considered equal. The key values are obtained from the global variables defined within the equation and from where the global variable names match the key field names of the table.

Syntax

This table shows examples of syntax for the keywords FIND FIRST, END FIND, and FIND NEXT:

Equation Keyword	***Operand Type***	***Operand***
FIND FIRST	<local or global>	<find success variable>
	TABLE	<table name>
	{<find condition>	<field name>}
END FIND		
N/A	N/A	N/A
FIND NEXT	<local or global>	<find success variable>
	TABLE	<table name>
END FIND		

The find success variable can be a local or global variable containing a truth value that indicates whether a row was found.

The find condition operators (EQUAL, GREATER-THAN, and GREATER-THAN-OR-EQUAL-TO) compare the assign variable against the table. The variables must have the same names as the fields of the table.

Every FIND statement must end with an END FIND keyword.

Example of Find Setup

This table shows example syntax for the keyword FIND FIRST:

Equation Keyword	***Operand Type***	***Operand***
FIND FIRST	LOCAL	FOUND_STUDENT

Equation Keyword	***Operand Type***	***Operand***
	TABLE	STDNT_FA_TERM
	KEYED LOCAL EQUAL	EMPLID
	KEYED LOCAL EQUAL	INSTITUTION
	KEYED LOCAL EQUAL	STRM
END FIND		

An alternative to looping through successive FIND NEXT statements is to issue a single CALL SQL statement, where the called SQL is a select statement. The values returned are placed into local stem variables, of which there is an upper limit of one thousand. If you exceed the limit, the equation engine will halt with a runtime error. For a large number of returned rows, it is best to process them with successive FIND NEXT statements and handle the data one row at a time. If you need to do changes en masse, you can call SQL to update temporary tables and avoid row-by- row processing, this technique is preferred.

HALT

Keyword: HALT

The HALT statement stops the execution run of all equations. The Equation Engine immediately returns control to its calling program; control is not returned to a calling equation. This keyword is typically used in the event of a catastrophic error. For example, a test is performed to determine whether a row exists for an emplID. If it does not, you issue a customized message to stop the equations.

IF

Keywords: IF, THEN, ELSE IF, ELSE, and END IF

The IF statement executes different statements depending on truth values within its conditions. Each IF statement block must conclude with an END IF keyword.

Syntax

IF

<condition-1>

THEN

<statement block-1>

[ELSE IF

<condition-n>

THEN

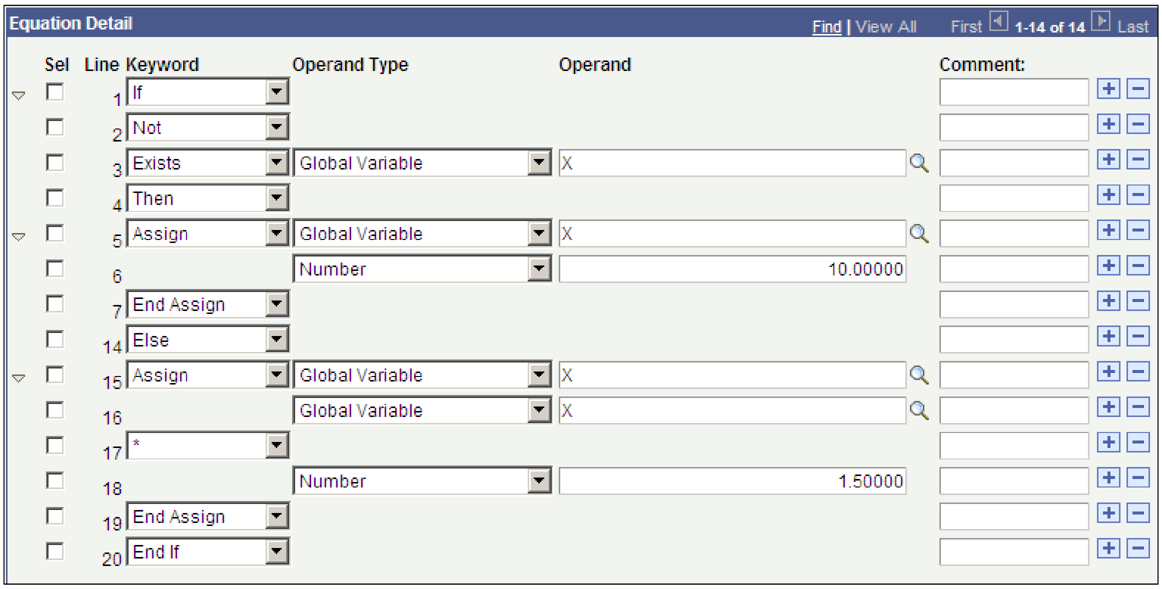
<statement block-n>] …

[ELSE

<statement block-n+1>]

END IF

This example illustrates the fields and controls on the Equation Editor page, if and End If Example. You can find definitions for the fields and controls later on this page.



The ELSE IF and ELSE expressions are optional. The ELSE IF expression enables you to create a case control structure so a single END IF can be used instead of nesting IF's. You can have zero, one, or several "ELSEIF … THEN …" constructs within a single IF statement.

Nested IF statements are allowed within the equation. A statement block can contain any other statements, including an IF statement.

INSERT

Keywords: INSERT, INTO, FROM, CHOOSE, WHERE, and END INSERT

Syntax

This table shows examples of syntax for the keywords INSERT, INTO, FROM CHOOSE, WHERE and END INSERT:

Equation Keyword	***Operand Type***	***Operand***
INSERT	TABLE	<table name>

Equation Keyword	***Operand Type***	***Operand***
[<statement block>]		
<INTO	FIELD	<field name>
FROM	<expression>	>...
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	
END INSERT		

This statement inserts rows into the specified table, limited to the <where expression> evaluating to true (if it is supplied), and then also limited to the choose equation (if it is supplied) returning a true value for each row.

<table name> is the name of a table to which the user has Equation Engine (EE) write authority.

See the DELETE statement for details on the <statement block>, CHOOSE, and WHERE clauses.

INTO specifies a field that is to have a value when the row is inserted. Its value is set from the result of the <expression> in the FROM clause. If a field is marked as being 'required' within the Application Designer definition for that record, then that field must have an INTO clause associated with it. If the FROM <expression> specifies a global stem, in the format of <recname>.<fieldname>.<anyname>, then the <anyname> qualified is assumed to be an index into the global stem with the name <recname>.<fieldname>, and the ending limit of that index will be assumed to be the <recname>.! COUNT global value. (See alternate insert syntax.)

Alternate Syntax

This table shows examples of syntax for the keywords INSERT, CHOOSE, WHERE, and END DELETE:

Equation Keyword	***Operand Type***	***Operand***
INSERT	GLOBAL	<recname>.
[<statement block>]		
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	

Equation Keyword	Operand Type	Operand
END DELETE		

This statement acts like the INSERT statement, except that the recname is followed by a dot, which makes the target of the insert a global stem. The value of <recname>.!COUNT will contain the number of rows in the global stem. If *X* is a global number holding a row number, then <recname>.<fieldname>.*X* will contain the value of the field <fieldname> in the table <recname> at row number *X*.

LOOP

Keywords: LOOP, EXIT LOOP, and END LOOP

The LOOP statement permits a block of statements to be run repetitively. Each LOOP statement block must end with an END LOOP statement.

Syntax

LOOP

<statement block>

END LOOP

Every loop block should include an EXIT LOOP keyword to stop the loop when the desired condition is reached. A RETURN or HALT statement can also be substituted, though it is discouraged because it makes your equations more difficult to maintain.

MESSAGE

Keywords: MESSAGE and END MESSAGE

The MESSAGE statement writes a message to the message log file (PS_MESSAGE_LOG) under the current process instance. It can contain up to 10 values, each of which can be a constant string, constant number, local or global variable, or table-field.

Syntax

This table shows an example of syntax for the keyword MESSAGE:

Equation Keyword	Operand Type	Operand
MESSAGE		
	{<data type>	<data value>}
END MESSAGE		

<data type> : STRING, DATE, NUMBER, LOCAL, GLOBAL, or TABLE xxx FIELD yyy

Note: Writing a message triggers a commit to be performed.

RESTORE

Keyword: RESTORE

Syntax

This table shows example syntax for the keyword RESTORE:

Equation Keyword	***Operand Type***	***Operand***
RESTORE	STRING	<equation global space
	[GLOBAL	<global variable name>]...
END RESTORE		

The RESTORE statement restores the specified global variable names from the previously created equation global space that is specified. If no global variable names are listed, then all global variables are restored, excluding read-only system variables.

RETURN

Keyword: RETURN

The RETURN statement causes the equation currently executing to stop processing, and it returns control to the calling equation. If no calling equation exists, then control returns to the program that called the Equation Engine. HALT and RETURN act the same if the Equation Engine calls only one equation and that equation does not call any others. An implicit RETURN statement is appended to the end of every equation if one was not placed there explicitly. The RETURN statement has no parameters. If you want to pass a parameter back to a calling equation, you must use global variables.

SAVE

Keyword: SAVE

Syntax

This table shows example syntax for the keyword SAVE:

Equation Keyword	***Operand Type***	***Operand***
SAVE	STRING	<equation global space

Equation Keyword	*Operand Type*	*Operand*
	[GLOBAL	<global variable name>]...
END SAVE		

The SAVE statement saves the specified global variable names to the specified equation global space. If no global variable names are listed, then all global variables are saved into the global space.

SKIP

Keyword: SKIP

The SKIP statements are used to make a program more readable. It allows you to break up the program statements, and it can simplify your IF logic.

Note: A SKIP statement does not affect your program.

TRACE

Keyword: TRACE

The TRACE statement causes the equation currently executing to start or stop displaying the type of trace information specified by the operand type.

Syntax

This table shows example syntax for the keyword TRACE:

Equation Keyword	*Operand Type*	*Operand*
TRACE		
	{<trace type>	<trace status>}...
END MESSAGE		

<trace type>: SOURCE, PCODE or SQL.

<trace status>: ON or OFF

Tracing SOURCE causes the line numbers of the source equation to appear to the COBOL log file as they are run; intermediate values also appear. Tracing PCODE causes the pseudo-code functions, their parameters, and their line numbers to appear as they are run; intermediate values and function results also appear. Tracing SQL causes the actual SQL that is run to appear; bind variables and values, if any, as well as the return code and row count or dml count for the SQL also appear. Retrieved table and-field values do not appear. To enable more than one trace type at the same time, issue more that one trace statement.

Tracing remains in effect globally until disabled. Therefore, a trace enabled in a called equation will continue tracing when control returns to the calling equation, and vice versa.

UPDATE

Keywords: UPDATE, SET, CHOOSE, WHERE, and END UPDATE

Syntax

The table shows example syntax for the keyword UPDATE:

Equation Keyword	***Operand Type***	***Operand***
UPDATE	TABLE	<table name>
[<statement block>]		
<SET	FIELD	<field name>
	<expression>	>...
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	
END UPDATE		

This statement updates rows in the specified table, limited to the <where expression> evaluating to true. See the DELETE statement for details on the <statement block>, CHOOSE, and WHERE clauses.

SET clause sets the specified <field name> in the <table name> to the value of the <expression>.

Basic Language Syntax

This table lists the parse objects used in the Equation Editor:

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<PROGRAM>	<STMT BLOCK> <ENDPROGRAM TOKEN>	ACCEPT	
<STMT BLOCK>	<STMT BLOCK> <STMT>		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<STMT BLOCK>	<STMT>		
<STMT>	<IF STMT>		
<STMT>	<LOOP STMT>		
<STMT>	<ASSIGN STMT>		
<STMT>	<CALL STMT>		
<STMT>	<RETURN STMT>		
<STMT>	<HALT STMT>		
<STMT>	<MESSAGE STMT>		
<STMT>	<EXIT LOOP STMT>		
<STMT>	<SKIP STMT>		
<STMT>	<FIND STMT>		
<STMT>	<FIND NEXT STMT>		
<STMT>	<TRACE STMT>		
<STMT>	<DELETE STMT>		
<STMT>	<INSERT STMT>		
<STMT>	<RESTORE STMT>		
<STMT>	<SAVE STMT>		
<STMT>	<UPDATE STMT>		
<IF STMT>	<IF START> <OR EXPR> <THEN PHRASE> <IF CLOSURE>	IFSTMT	

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<IF CLOSURE>	<ELSIF THEN LIST> <STMT BLOCK> <IF ENDING>		
<IF CLOSURE>	<STMT BLOCK> <IF ENDING>		
<IF ENDING>	<ELSE PHRASE> <STMT BLOCK> <ENDIF TOKEN>		
<IF ENDING>	<ENDIF TOKEN>		
<ELSIF THEN LIST>	<ELSIF THEN LIST> <ELSIF THEN PHRASE>		
<ELSIF THEN LIST>	<ELSIF THEN PHRASE>		
<ELSIF THEN PHRASE>	<STMT BLOCK> <ELSIF PHRASE> <OR EXPR> <THEN PHRASE>		
<IF START>	<IF TOKEN>	IFSTART	
<LOOP STMT>	<LOOP START> <STMT BLOCK> <ENDLOOP TOKEN>	LOOPEND	
<LOOP START>	<LOOP TOKEN>	LOOPSTART	
<ASSIGN STMT>	<ASSIGN TOKEN> <ASSIGNABLE DATATYPE> <OR EXPR> <ENDASSIGN TOKEN>	ASSIGN	
<OR EXPR>	<OR EXPR> <OR TOKEN> <AND EXPR>	OR	
<OR EXPR>	<AND EXPR>		<AND TOKEN>
<AND EXPR>	<AND EXPR> <AND TOKEN> <NOT EXPR>	AND	
<AND EXPR>	<NOT EXPR>		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<NOT EXPR>	<REL EXPR>		<EQUAL TOKEN> OR <LESS TOKEN> OR <LESS OR EQUAL TOKEN> OR <GREATER TOKEN> OR <GREATER OR EQUAL TOKEN> OR <UNEQUAL TOKEN>
<NOT EXPR>	<NOT TOKEN> <NOT EXPR>	NOT	
<NOT EXPR>	<NOT TOKEN> <OR EXPR>	NOT	
<REL EXPR>	<REL EXPR> <COMPARE LESS> <SUM EXPR>	LESS	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE EQUAL> <SUM EXPR>	EQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE LESS EQUAL> <SUM EXPR>	LESSEQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE GREATER> <SUM EXPR>	GREATER	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE GREATER EQUAL> <SUM EXPR>	GREATEREQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE UNEQUAL> <SUM EXPR>	UNEQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<SUM EXPR>		<MINUS TOKEN> OR <PLUS TOKEN>

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<SUM EXPR>	<SUM EXPR> <PLUS TOKEN> <PRODUCT EXPR>	ADD	<DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<SUM EXPR>	<SUM EXPR> <MINUS TOKEN> <PRODUCT EXPR>	SUBTRACT	<DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<SUM EXPR>	<PRODUCT EXPR>		<DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<PRODUCT EXPR>	<PRODUCT EXPR> <MULTIPLY TOKEN> <MONADIC EXPR>	MULTIPLY	
<PRODUCT EXPR>	<PRODUCT EXPR> <DIVIDE TOKEN> <MONADIC EXPR>	DIVIDE	
<MONADIC EXPR>	<NEGATE TOKEN> <OR EXPR>	NEGATE	
<MONADIC EXPR>	<NEGATE TOKEN> <MONADIC EXPR>	NEGATE	
<PRODUCT EXPR>	<MONADIC EXPR>		
<MONADIC EXPR>	<VALUE>		
<MONADIC EXPR>	<LEFTPAREN TOKEN> <OR EXPR> <RIGHTPAREN TOKEN>		
<INTO HEADER>	<INTO TOKEN> <STRING LITERAL TOKEN>	INTOSTRHDR	
<VALUE>	<NUMERIC LITERAL TOKEN>	NUMBER	
<VALUE>	<STRING LITERAL TOKEN>	STRING	
- <VALUE>	<DATE LITERAL TOKEN>	DATE	

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<VALUE>	<DATA VALUE>		
<VALUE>	<EXISTS STMT>		
<DATA VALUE>	<TABLEFIELD>	GETTBLFLDVALUE	
<DATA VALUE>	<GLOBALFIELD>	GETGLOBVALUE	
<DATA VALUE>	<LOCALFIELD>	GETLOCVALUE	
<FIND STMT>	<FIND TOKEN> <ASSIGN FIND DATATYPE> <TABLENAME> <KEY IDENTIFIER LIST> <ENDFIND TOKEN>	FIND	
<FIND NEXT STMT>	<FIND NEXT TOKEN> <ASSIGN FIND DATATYPE> <TABLENAME> <ENDFIND TOKEN>	FINDNEXT	
<CALL STMT>	<CALL HEADER>	CALL	<CALLPARMS TOKEN>
<CALL STMT>	<CALL HEADER> <CALL PARMS STMT>	CALLWITHPARMS	
<CALL HEADER>	<CALL TOKEN> <EQUATIONTYPE TOKEN> <IDENTIFIER TOKEN>	CALLEQUATION	
<CALL HEADER>	<CALL TOKEN> <EXTERNALTYPE TOKEN> <IDENTIFIER TOKEN>	CALLEXTERNAL	
<CALL HEADER>	<CALL TOKEN> <APPENGINETYPE TOKEN> <IDENTIFIER TOKEN>	CALLAPPENG	

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<CALL HEADER>	<CALL TOKEN> <SQLTYPE TOKEN> <IDENTIFIER TOKEN>	CALLSQL	
<CALL PARMS STMT>	<CALLPARMS TOKEN> <CALL PARM LIST> <ENDCALLPARMS TOKEN>		
<CALL PARM LIST>	<CALL PARM LIST> <CALL PARM>		
<CALL PARM LIST>	<CALL PARM>		
<CALL PARM>	<CALL LOCALFIELD>		
<CALL LOCALFIELD>	<CALL LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	CALLLOCAL	
<RETURN STMT>	<RETURN TOKEN>	RETURN	
<HALT STMT>	<HALT TOKEN>	HALT	
<MESSAGE STMT>	<MESSAGE TOKEN> <MESSAGE PARM LIST> <ENDMESSAGE TOKEN>	MSG	
- <MESSAGE PARM LIST>	<MESSAGE PARM LIST> <MESSAGE PARM>		
<MESSAGE PARM LIST>	<MESSAGE PARM>	MSGPARM	
<MESSAGE PARM>	<MSG NUMERIC LITERAL TOKEN>	MSGNUMBER	
<MESSAGE PARM>	<MSG STRING LITERAL TOKEN>	MSGSTRING	
<MESSAGE PARM>	<MSG DATE LITERAL TOKEN>	MSGDATE	
<MESSAGE PARM>	<MSG DATA VALUE>		

Parse Object	*Elaboration*	*Code Gen*	*Look Ahead* *(Skip reduction if next token is . . .)*
<MSG DATA VALUE>	<MSG TABLEFIELD>		
<MSG DATA VALUE>	<MSG GLOBALFIELD>		
<MSG DATA VALUE>	<MSG LOCALFIELD>		
<MSG TABLENAME>	<MSG TABLETYPE TOKEN> <IDENTIFIER TOKEN>	MSGTABLENAME	
<INSERT START>	<INSERT HDR> <GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	INSGLOB	
<MSG TABLEFIELD>	<MSG TABLENAME> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	MSGTABLEFIELD	
<MSG GLOBALFIELD>	<MSG GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	MSGGLOBAL	
<MSG LOCALFIELD>	<MSG LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	MSGLOCAL	
<EXIT LOOP STMT>	<EXITLOOP TOKEN>	EXITLOOP	
<EXISTS STMT>	<EXISTS TOKEN> <EXISTS GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	EXISTSGLOBAL	
<EXISTS STMT>	<EXISTS TOKEN> <EXISTS LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	EXISTSLOCAL	
<EXISTS STMT>	<EXISTS TOKEN> <EXISTS TABLETYPE TOKEN> <IDENTIFIER TOKEN>	EXISTSTABLE	

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<ASSIGNABLE DATATYPE>	<ASGN GLOBALFIELD>		
<ASSIGNABLE DATATYPE>	<ASGN LOCALFIELD>		
<ASSIGN FIND DATATYPE>	<FIND GLOBALFIELD>		
<ASSIGN FIND DATATYPE>	<FIND LOCALFIELD>		
<INSERT START>	<INSERT HDR> <TABLETYPE TOKEN> <IDENTIFIER TOKEN>	INSTABLE	
<DELETE START>	<DELETE HDR> <TABLETYPE TOKEN> <IDENTIFIER TOKEN>	DELTABLE	
<UPDATE START>	<UPDATE HDR> <TABLETYPE TOKEN> <IDENTIFIER TOKEN>	UPDTABLE	
<TABLENAME>	<TABLETYPE TOKEN> <IDENTIFIER TOKEN>	TABLENAME	
<TABLEFIELD>	<TABLENAME> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	TABLEFIELD	
<GLOBALFIELD>	<GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	GLOBALFIELD	
<ASGN GLOBALFIELD>	<ASGN GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	ASGNGLOBAL	
<LOCALFIELD>	<LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	LOCALFIELD	
<FIND LOCALFIELD>	<FIND LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	FINDLOCAL	

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<FIND GLOBALFIELD>	<FIND GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	FINDGLOBAL	
<ASGN LOCALFIELD>	<ASGN LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	ASGNLOCAL	
<KEY IDENTIFIER LIST>	<KEY IDENTIFIER LIST> <KEY IDENTIFIER>		
<KEY IDENTIFIER LIST>	<KEY IDENTIFIER>		
<KEY IDENTIFIER>	<KEY LOCAL EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYLOCEQ	
<KEY IDENTIFIER>	<KEY LOCAL GREATER TOKEN> <IDENTIFIER TOKEN>	KEYLOCGT	
<KEY IDENTIFIER>	<KEY LOCAL GREATER EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYLOCGE	
<KEY IDENTIFIER>	<KEY GLOBAL EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYGLOBEQ	
<KEY IDENTIFIER>	<KEY GLOBAL GREATER TOKEN> <IDENTIFIER TOKEN>	KEYGLOBGT	
<KEY IDENTIFIER>	<KEY GLOBAL GREATER EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYGLOBGE	
<COMPARE LESS>	<LESS TOKEN>		
<COMPARE LESS EQUAL>	<LESS OR EQUAL TOKEN>		
<COMPARE EQUAL>	<EQUAL TOKEN>		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<COMPARE GREATER>	<GREATER TOKEN>		
<COMPARE GREATER EQUAL>	<GREATER OR EQUAL TOKEN>		
<COMPARE UNEQUAL>	<UNEQUAL TOKEN>		
<THEN PHRASE>	<THEN TOKEN>	THEN	
<ELSE PHRASE>	<ELSE TOKEN>	ELSE	
<ELSIF PHRASE>	<ELSIF TOKEN>	ELSIF	
<SKIP STMT>	<SKIP TOKEN>	NONE	
<TRACE STMT>	<TRACE TOKEN> <TRACE SQL TOKEN> <TRACE ON OR OFF>	TRACESQL	
<TRACE STMT>	<TRACE TOKEN> <TRACE PCODE TOKEN> <TRACE ON OR OFF>	TRACEPCODE	
<TRACE STMT>	<TRACE TOKEN> <TRACE SOURCE TOKEN> <TRACE ON OR OFF>	TRACESOURCE	
<TRACE ON OR OFF>	<ON TOKEN>	TRACEON	
<TRACE ON OR OFF>	<OFF TOKEN>	TRACEOFF	
<DELETE STMT>	<DELETE START> <STMT BLOCK> <DELETE END>	DEL	
<DELETE STMT>	<DELETE START> <DELETE END>	DEL	
<DELETE STMT>	<DELETE START> <STMT BLOCK> <CHOOSE CLAUSE> <DELETE END>	DEL	

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<DELETE STMT>	<DELETE START> <CHOOSE CLAUSE> <DELETE END>	DEL	
<DELETE HDR>	<DELETE TOKEN>	DELHDR	
<DELETE END>	<WHERE TOKEN> <WHERE EXPR LIST> <ENDDELETE TOKEN>		
<DELETE END>	<ENDDELETE TOKEN>		
<INSERT STMT>	<INSERT START> <STMT BLOCK> <INTO LIST> <INSERT END>	INS	
<INSERT STMT>	<INSERT START> <INTO LIST> <INSERT END>	INS	
<INSERT STMT>	<INSERT START> <STMT BLOCK> <INTO LIST> <CHOOSE CLAUSE> <INSERT END>	INS	
<INSERT STMT>	<INSERT START> <INTO LIST> <CHOOSE CLAUSE> <INSERT END>	INS	
<INSERT HDR>	<INSERT TOKEN>	INSHDR	
<INSERT END>	<WHERE TOKEN> <WHERE EXPR LIST> <ENDINSERT TOKEN>		
<INSERT END>	<ENDINSERT TOKEN>		
<INTO LIST>	<INTO LIST> <INTO CLAUSE>		
<INTO LIST>	<INTO CLAUSE>		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<RESTORE STMT>	<RESTORE TOKEN> <GLOBALSPACE ID> <GLOBALSPACE FIELD LIST> <ENDRESTORE TOKEN>	RESTORE	
<RESTORE STMT>	<RESTORE TOKEN> <GLOBALSPACE ID> <ENDRESTORE TOKEN>	RESTORE	
<SAVE STMT>	<SAVE TOKEN> <GLOBALSPACE ID> <GLOBALSPACE FIELD LIST> <ENDSAVE TOKEN>	SAVE	
<SAVE STMT>	<SAVE TOKEN> <GLOBALSPACE ID> <ENDSAVE TOKEN>	SAVE	
<UPDATE STMT>	<UPDATE START> <STMT BLOCK> <SETFIELD LIST> <UPDATE END>	UPD	
<UPDATE STMT>	<UPDATE START> <SETFIELD LIST> <UPDATE END>	UPD	
<UPDATE STMT>	<UPDATE START> <STMT BLOCK> <SETFIELD LIST> <CHOOSE CLAUSE> <UPDATE END>	UPD	
<UPDATE STMT>	<UPDATE START> <SETFIELD LIST> <CHOOSE CLAUSE> <UPDATE END>	UPD	
<UPDATE HDR>	<UPDATE TOKEN>	UPDHDR	
<UPDATE END>	<WHERE TOKEN> <WHERE EXPR LIST> <ENDUPDATE TOKEN>		
<UPDATE END>	<ENDUPDATE TOKEN>		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<GLOBALSPACE FIELD LIST>	<GLOBALSPACE FIELD LIST> <GLOBALSPACE FIELD>	GBLSPCFIELD	
<GLOBALSPACE FIELD LIST>	<GLOBALSPACE FIELD>	GBLSPCFIELD	
<WHERE EXPR LIST>	<WHERE EXPR LIST> <WHERE EXPR TOKEN>	WHEREEXPR	
<WHERE EXPR LIST>	<WHERE EXPR TOKEN>	WHEREEXPR	
<CHOOSE CLAUSE>	<CHOOSE TOKEN> <EQUATIONTYPE TOKEN> <IDENTIFIER TOKEN>	CHOOSE	
<INTO CLAUSE>	<INTO HEADER> <FROM CLAUSE>	INTO	
<INTO HEADER>	<INTO TOKEN> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	INTOFLDHDR	
<FROM CLAUSE>	<FROM TOKEN> <OR EXPR>		
<SETFIELD LIST>	<SETFIELD LIST> <SETFIELD CLAUSE>		
<SETFIELD LIST>	<SETFIELD CLAUSE>		
<SETFIELD CLAUSE>	<SETFIELD HDR> <OR EXPR>	SETFIELD	
<SETFIELD HDR>	<SET TOKEN> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	SETFLDHDR	
<GLOBALSPACE FIELD>	<SPACE GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<GLOBALSPACE ID>	<SPACENAME STRINGTYPE TOKEN> <IDENTIFIER TOKEN>	GBLSPACEID	
*** TOKENS ***			
<AND TOKEN>	AND		
<APPENGINETYPE TOKEN>	APEN		
<ASGN GLOBALTYPE TOKEN>	G but it is bracketed by ASSIGN/END ASSIGN		
<ASGN LOCALTYPE TOKEN>	L but it is bracketed by ASSIGN/END ASSIGN		
<ASSIGN TOKEN>	ASSIGN		
<CALL TOKEN>	CALL		
<CALL LOCALTYPE TOKEN>	L but it is bracketed by CALLPARMS/END CALLPARMS		
<CALLPARMS TOKEN>	CALLPARMS		
<CHOOSE TOKEN>	CHOOSE		
<DATE LITERAL TOKEN>	D followed by a number		
<DELETE TOKEN>	DELETE		
<DIVIDE TOKEN>	/		
<ELSE TOKEN>	ELSE	Update address of false jump. Push truejump address placeholder.	
<ELSIF TOKEN>	ELSIF		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<ENDASSIGN TOKEN>	END ASSIGN		
<ENDCALLPARMS TOKEN>	END CALLPARMS		
<ENDDELETE TOKEN>	END DELETE		
<ENDFIND TOKEN>	END FIND		
<ENDIF TOKEN>	END IF	Update address of false jump, true jump, or both.	
<ENDINSERT TOKEN>	END INSERT		
<ENDLOOP TOKEN>	END LOOP	Update addresses of exitloop jumps.	
<ENDMESSAGE TOKEN>	END MESSAGE		
<ENDPROGRAM TOKEN>	END PROGRAM		
<ENDRESTORE TOKEN>	END RESTORE		
<ENDSAVE TOKEN>	END SAVE		
<ENDUPDATE TOKEN>	END UPDATE		
<EQUAL TOKEN>	=		
<EQUATIONTYPE TOKEN>	E		
<EXISTS GLOBALTYPE TOKEN>	G but it is preceded by EXISTS		
<EXISTS LOCALTYPE TOKEN>	L but it is preceded by EXISTS		
<EXISTS TABLETYPE TOKEN>	T but it is preceded by EXISTS		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<EXISTS TOKEN>	EXISTS		
<EXITLOOP TOKEN>	EXIT LOOP	Push placeholder jump for exitloop.	
<EXTERNALTYPE TOKEN>	X		
<FIELDTYPE TOKEN>	F		
<FIND GLOBALTYPE TOKEN>	G but it is bracketed by FIND/ END FIND		
<FIND LOCALTYPE TOKEN>	L but it is bracketed by FIND/ END FIND		
<FIND NEXT TOKEN>	FIND NEXT		
<FIND TOKEN>	FIND		
<FROM TOKEN>	FROM		
<GLOBALTYPE TOKEN>	G		
<GREATER OR EQUAL TOKEN>	>=		
<GREATER TOKEN>	>		
<HALT TOKEN>	HALT		
<IDENTIFIER TOKEN>	NONE		
<IF TOKEN>	IF		
<INSERT TOKEN>	INSERT		
<INTO TOKEN>	INTO		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<KEY GLOBAL EQUAL TOKEN>	KGEQ		
<KEY GLOBAL GREATER EQUAL TOKEN>	KGGE		
<KEY GLOBAL GREATER TOKEN>	KGGT		
<KEY LOCAL EQUAL TOKEN>	KLEQ		
<KEY LOCAL GREATER EQUAL TOKEN>	KLGE		
<KEY LOCAL GREATER TOKEN>	KLGT		
<LEFTPAREN TOKEN>	(		
<LESS OR EQUAL TOKEN>	<=		
<LESS TOKEN>	<		
<LOCALTYPE TOKEN>	L		
<LOOP TOKEN>	LOOP		
<MESSAGE TOKEN>	MESSAGE		
<MINUS TOKEN>	- but prior token is a number, identifier, or left parenthesis		
<MSG DATE LITERAL TOKEN>	D but it is bracketed by MESSAGE/END MESSAGE		
<MSG GLOBALTYPE TOKEN>	G but it is bracketed by MESSAGE/END MESSAGE		
<MSG LOCALTYPE TOKEN>	L but it is bracketed by MESSAGE/END MESSAGE		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<MSG NUMERIC LITERAL TOKEN>	Bracketed by MESSAGE/ END MESSAGE		
<MSG STRING LITERAL TOKEN>	Bracketed by MESSAGE/ END MESSAGE		
<MSG TABLETYPE TOKEN>	T but it is bracketed by MESSAGE/END MESSAGE		
<MULTIPLY TOKEN>	*		
<NEGATE TOKEN>	- but prior token is not a number, identifier, or left parenthesis		
<NOT TOKEN>	NOT		
<NUMERIC LITERAL TOKEN>	N followed by a number		
<OFF TOKEN>	OFF		
<ON TOKEN>	ON		
<OR TOKEN>	OR		
<PLUS TOKEN>	+		
<RESTORE TOKEN>	RESTORE		
<RETURN TOKEN>	RETURN		
<RIGHTPAREN TOKEN>	)		
<SAVE TOKEN>	SAVE		
<SET TOKEN>	SET		
<SKIP TOKEN>	SKIP		

Parse Object	***Elaboration***	***Code Gen***	***Look Ahead*** ***(Skip reduction if next token is . . .)***
<SPACE GLOBALTYPE TOKEN>	G but bracketed by SAVE/ END SAVE or RESTORE/ END RESTORE		
<SPACENAME STRINGTYPE TOKEN>	S but bracketed by SAVE/ END SAVE or RESTORE/ END RESTORE		
<SQLTYPE TOKEN>	SQL		
<STRING LITERAL TOKEN>	S or V followed by a string		
<TABLETYPE TOKEN>	T		
<THEN TOKEN>	THEN	False jump to placeholder address.	
<TRACE PCODE TOKEN>	PCODE		
<TRACE SOURCE TOKEN>	SOURCE		
<TRACE SQL TOKEN>	SQL but prior token is a trace token		
<TRACE TOKEN>	TRACE		
<UNEQUAL TOKEN>	<>		
<UPDATE TOKEN>	UPDATE		
<WHERE EXPR TOKEN>	Anything between a WHERE token and one of END INSERT, END DELETE, or END UPDATE.		
<WHERE TOKEN>	WHERE		

Equation Engine Security

This section discusses the components of PeopleSoft Equation Engine security and how to implement them at your site.

Components of Equation Engine Security and Their Implementation

The following topics describe the components involved in Equation Engine security and how to implement Equation Engine security at your site.

Security Features

Equation Engine security features:

- Provide different levels of access (authorizations) to the equation objects based indirectly on the user identification (user ID). The three levels of access are:
  - Execute.
  - Read (contains Execute).
  - Write (contains Execute and Read).
- Provide a hierarchy (tree) of classes (user profile values) that are associated with the user ID.
- Associate different authorizations with different user profile values.
- Maintain the authorizations using the equation security trees.

User IDs and User Profiles

A user signs on to the database with a user ID. The ID is associated with zero or more user profile types, each of which is associated with exactly one user profile value. The types are:

Profile Type	***Description***	***Controls Access To***
EQD	Equation Data Auth Class	Table and View Data
EQN	Equation Name Auth Class	Equations
EQS	Equation SQL Auth Class	Callable SQL
EQX	Equation External Subroutine Auth Class	External Subroutines

Each user profile type has a controlling tree that determines the hierarchy of user profile values. For example, the highest root access would be PUBLIC, under which could be FIN AID ADMINS. User ID PS could be associated with FIN AID ADMINS under user profile type EQN.

Another user ID might be associated with PUBLIC. The hierarchy for EQN does not have to be the same as the hierarchy for EQS, EQD, or EQX. Each hierarchy can be different.

You might add a DEVELOPER class for EQN under FIN AID ADMINS in which only one FIN AID ADMINS user is included. You can set this user's access to WRITE, whereas all other FIN AID ADMINS have READ access to equations. Note that read-only access to an equation means that it cannot be viewed or modified from the Equation Engine component. Instead, it can be viewed only from the Equation View component.

You should not modify the user profile types. However, you must modify the user profile values using the tree structures and assign those values to various user IDs as appropriate.

User Profile Values

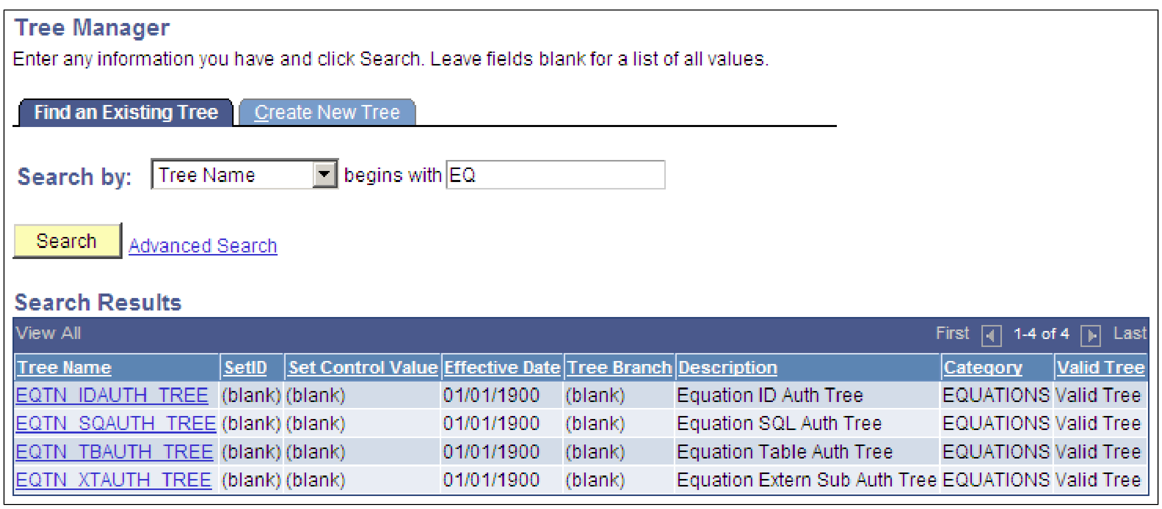
Just as each user ID in the system is associated with a Permission List (for example, ALLPANLS), each user profile type for each user can have one value associated with it (for example, PUBLIC). Initially, one is provided: PUBLIC. However, you are strongly encouraged to create your own new user profile values using the equation security trees. If a user ID does not have a user profile type and value set for it, then Equation Engine assumes a user profile value of PUBLIC by default.

Equation Security Trees

Use Tree Manager to maintain the equation security trees.

Select **Tree Manager** > **Use** > **Tree Manager** > **Tree Manager.** The following page shows the Tree Name in Tree Manager.

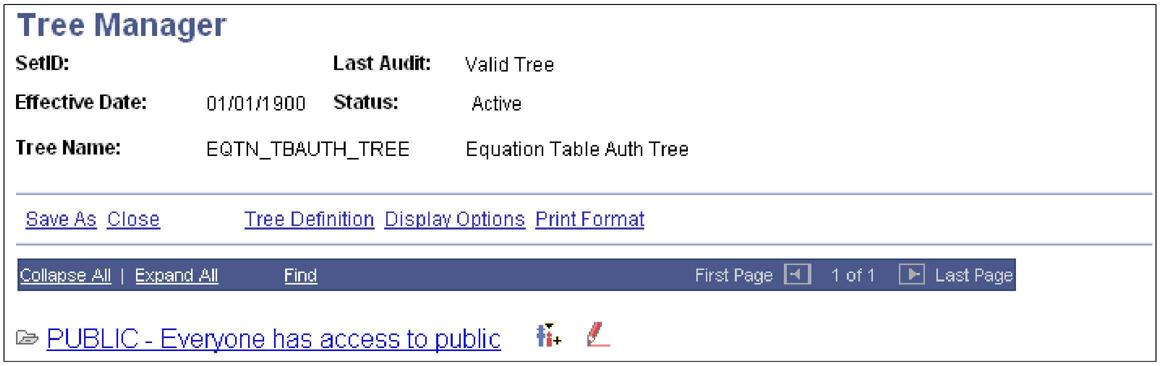
This example illustrates the fields and controls on the Tree Manager, Tree Names example. You can find definitions for the fields and controls later on this page.



Tree Name	SetID	Set Control Value	Effective Date	Tree Branch	Description	Category	Valid Tree
EQTN_IDAUTH_TREE	(blank)	(blank)	01/01/1900	(blank)	Equation ID Auth Tree	EQUATIONS	Valid Tree
EQTN_SQAUTH_TREE	(blank)	(blank)	01/01/1900	(blank)	Equation SQL Auth Tree	EQUATIONS	Valid Tree
EQTN_TBAUTH_TREE	(blank)	(blank)	01/01/1900	(blank)	Equation Table Auth Tree	EQUATIONS	Valid Tree
EQTN_XTAUTH_TREE	(blank)	(blank)	01/01/1900	(blank)	Equation Extern Sub Auth Tree	EQUATIONS	Valid Tree

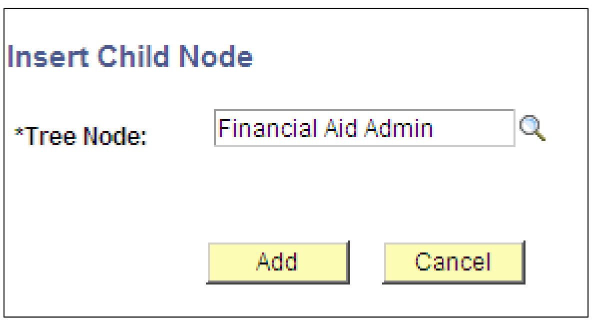
The following page is an example of a view of Public Access in the equation security tree.

This example illustrates the fields and controls on the Tree Manager page, PUBLIC Access Example. You can find definitions for the fields and controls later on this page.

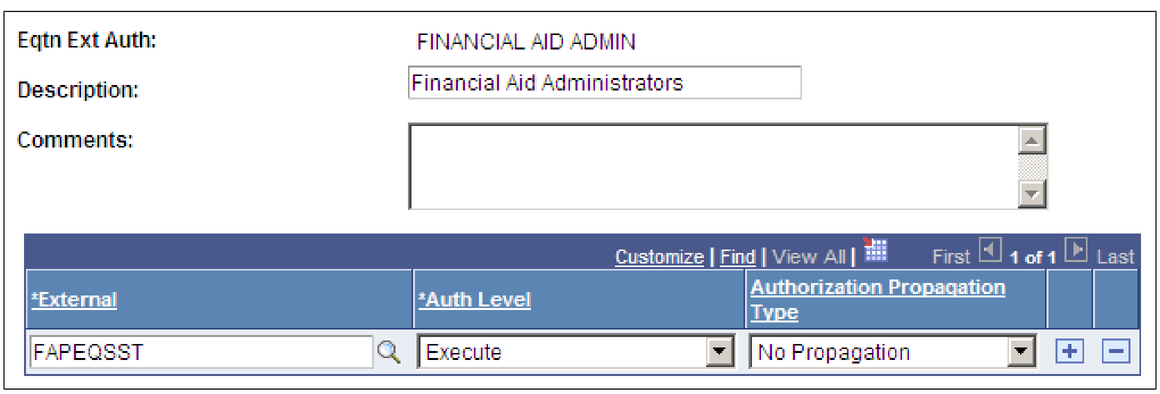


If you click the **Insert Child Node** icon to the right of PUBLIC and add a new node underneath it, this is the result:

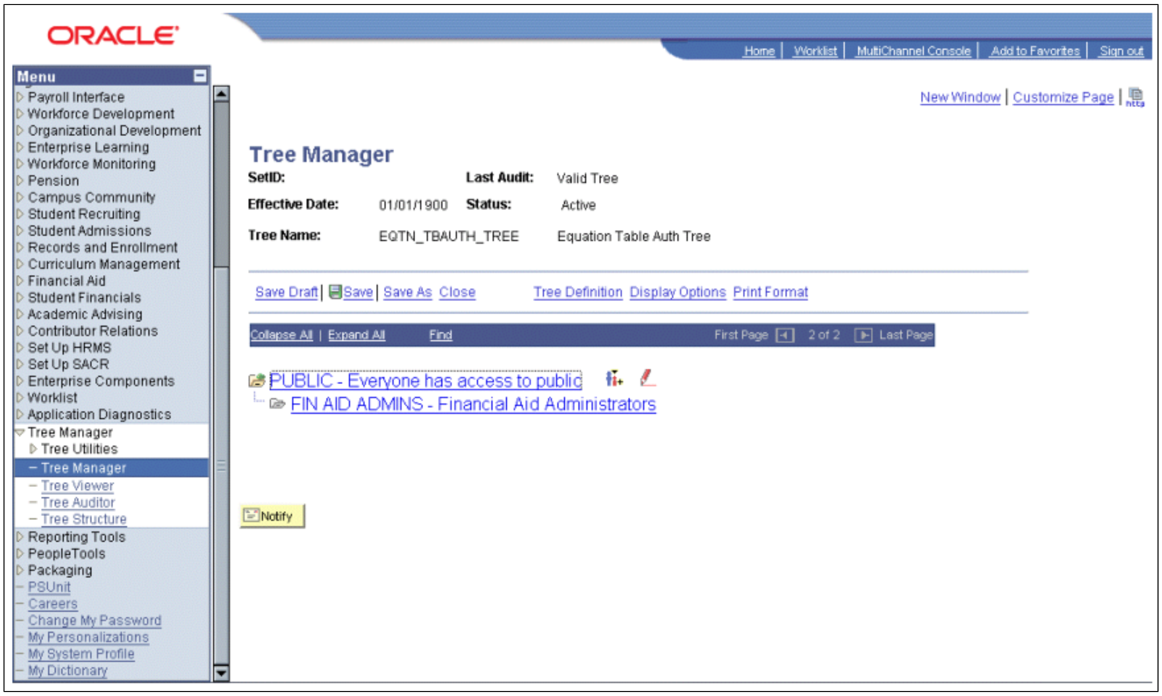
This example illustrates the fields and controls on the Insert Child Node page. You can find definitions for the fields and controls later on this page.



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



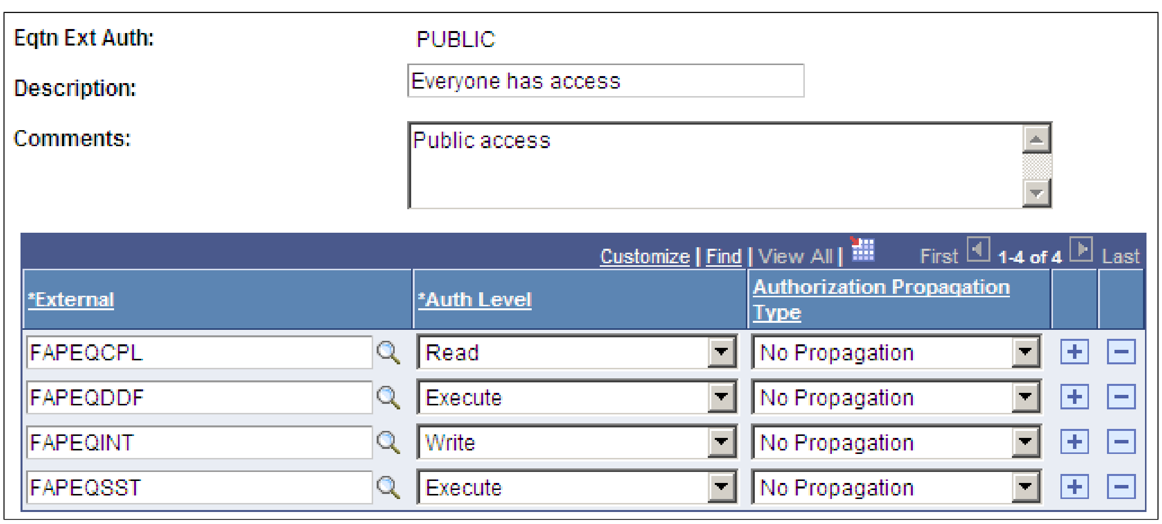
This example illustrates the fields and controls on the Tree Manager page, Child Node Example. You can find definitions for the fields and controls later on this page.



You click a tree node to select it, and then you click the red pencil icon (Edit Data) to view or modify the access settings for the selected tree node.

If you add new nodes here, then these new node names within the tree are added to the list of valid values that can be selectable as user profile type values for the user profile type associated with the tree structure being modified. Design your security tree structure to reflect the security needs within your organization based upon who needs what kind of access to which kinds of equation objects. Only the security administrator should have update access to edit these equation security tree structures and their associated lists of equation objects.

This example illustrates the fields and controls on the Equation Table Authorization page, Authorization examples. You can find definitions for the fields and controls later on this page.



If a table has read authorization, then it can be used in FIND statements and table field references in expressions. If a table has write authorization, then it can also be referenced in the DELETE, INSERT, and UPDATE mass action statements.

To simplify access maintenance, select an Authorization Propagation type from the Authorization Propagation Type drop-down list box.

This table describes the Authorization Propagation Type values:

Value	***Description***
Append Auth To All Child Nodes	When you click the **Save** button, the authorization of the equation object is added to all child nodes of the current node that do not already have an access type assigned.
Delete Auth In All Child Nodes	When you click the **Save** button, the authorization of the equation object is removed from all child nodes, regardless of the previous access assigned.
Replace Auth In All Child Nodes	When you click the **Save** button, the authorization of the equation object is set within all child nodes, regardless of the previous access assigned.

If you delete or rename an equation node from the tree manager, the underlying authorizations should be deleted automatically. If they are not, complete these steps to correct the error and to begin an analysis of the problem.

To correct the error, run the Application Engine process named SCC_EQAUTPUR.

1. Navigate to PeopleTools > Application Engine > Request AE.
2. Add a run control for SCC_EQAUTPUR, select process frequency *Always,* and click **RUN.**
3. Select your process server, select the process named SCC_EQAUTPUR, and click the **OK** button.
4. Navigate to the process monitor and verify that the process ran successfully.

This process purges the authorizations that are no longer associated with any tree nodes.

To analyze the cause of the problem, navigate to PeopleTools > Integration Broker > Service Operations Monitor > Monitoring > Asynchronous Services and complete these steps:

1. Look in the TREE_MAINT queue.
2. Verify that all the transactions in the TREE_MAINT queue are at *Done* status.
3. Select the Subscription Contracts tab.
4. Change the **Node Name** value to the default local node.
5. Change the **Service Operation** value to *TREE_CHANGE.*
6. Change the **Queue Name** value to *TREE_MAINT.*

7. Select the *Done* status.

8. Click the **Refresh** button.

9. Click the **Details** link of the most recent transaction.

The Asynchronous Details page for that transaction appears. The **Action Name** value should be *Equation_Auth_Change_Handler* and the status should be *Done.*

If so, then the orphan equation authorization node leaves should have been automatically purged when the equation authorization node was deleted or renamed in tree manager. If the status of the transaction is not *Done,* then correct your Application Messaging environment.

Authorization Levels

EQN (user profile type) authorizations of type WRITE permit a user to update an equation. Therefore, the authorization class is used in the search record for the Equations page.

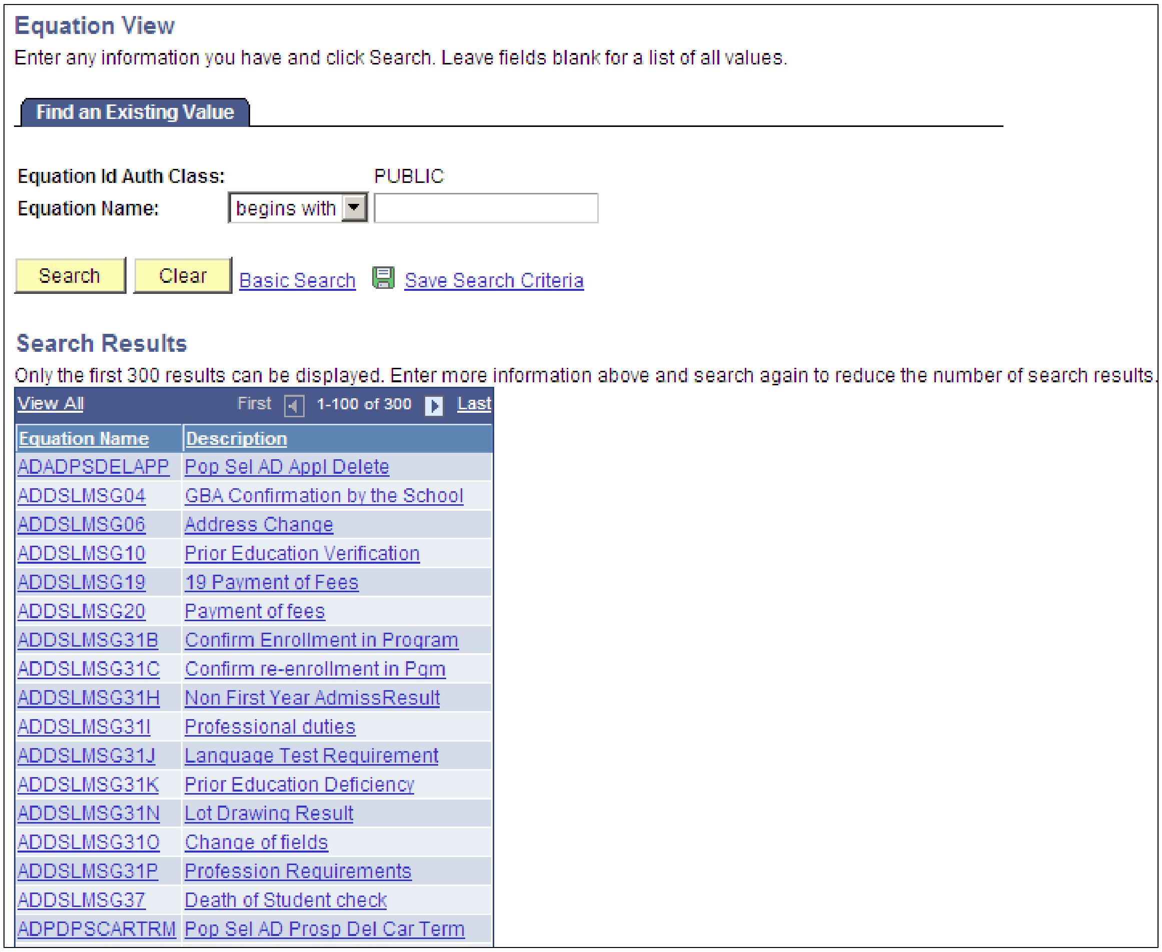
Select Set Up SACR, Common Definitions, Equation Engine, Equation Editor.

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

The authorization class pertaining to equation names for the logged-in user ID (in this case, PUBLIC) is already supplied on the search page. When you click the **Search** button, the system displays a list of equations and equation descriptions that any user with PUBLIC access can update.

Select Set Up SACR, Common Definitions, Equation Engine, Review Equations.

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



In the Equation View search page, only equations that the user ID has write or read access appear.

In a similar way, the EQD user profile type provides a control point for access to tables and views that you are allowed to read when you create an equation. The EQS user profile type provides controls for determining which callable SQL you can invoke, and the EQX user profile type establishes a control point for determining which external subroutines you can call when you create an equation.

User Profiles

Equation Security is based on the user profile tools construct that comes with tools.

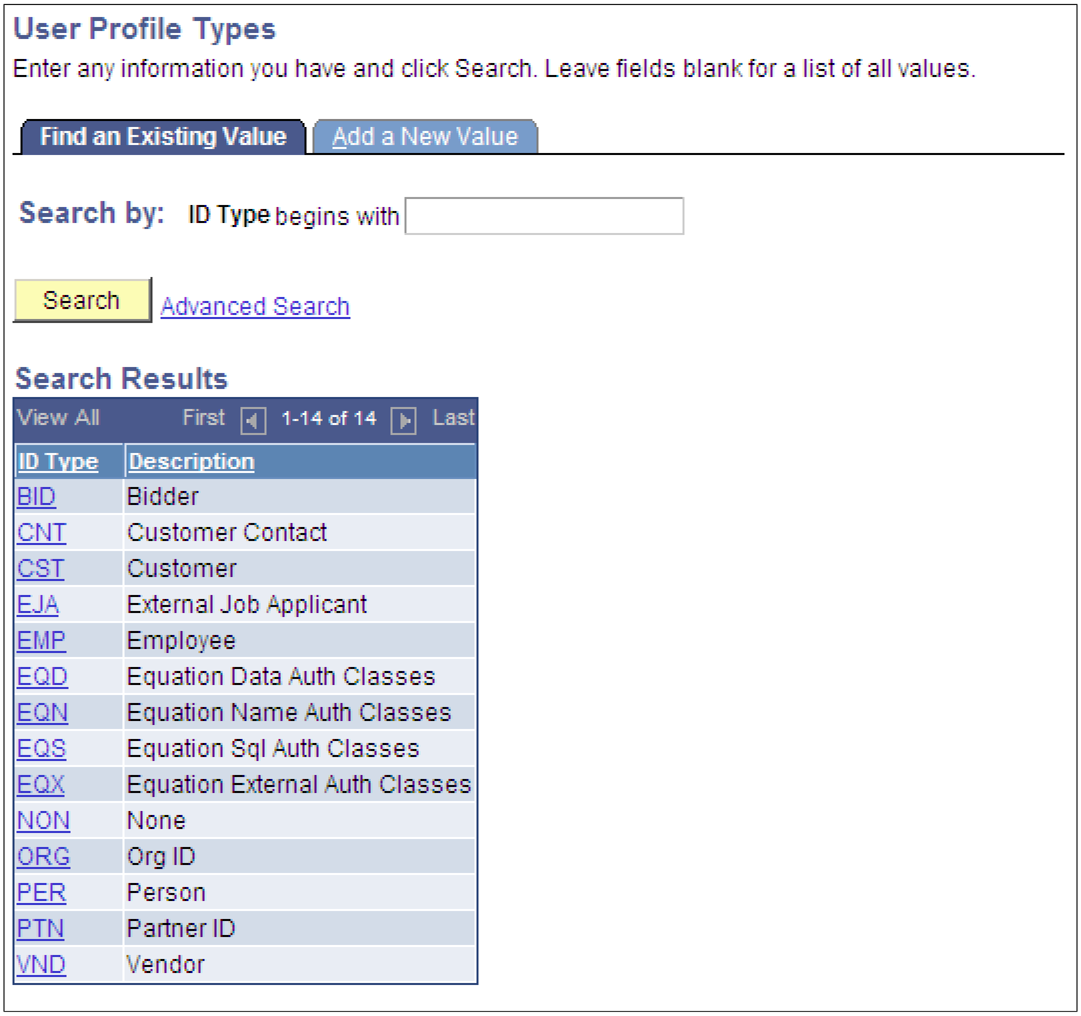
You will probably not modify the user profile type because it is tied to a program logic. However, you are required to change the profile type values within each type, assigning a value for each type for each user ID. The valid type values are the names of the tree nodes associated with the type.

User Profile Types

Each user profile type represents an entire set of user profile values; each user profile type is used for a particular application purpose. Normally, when a user signs on, he or she is assigned to roles and permissions lists, which determine the user's menu access. To assign users to different user profile values that do not necessarily correspond to roles and permission lists, you must use user profile types.

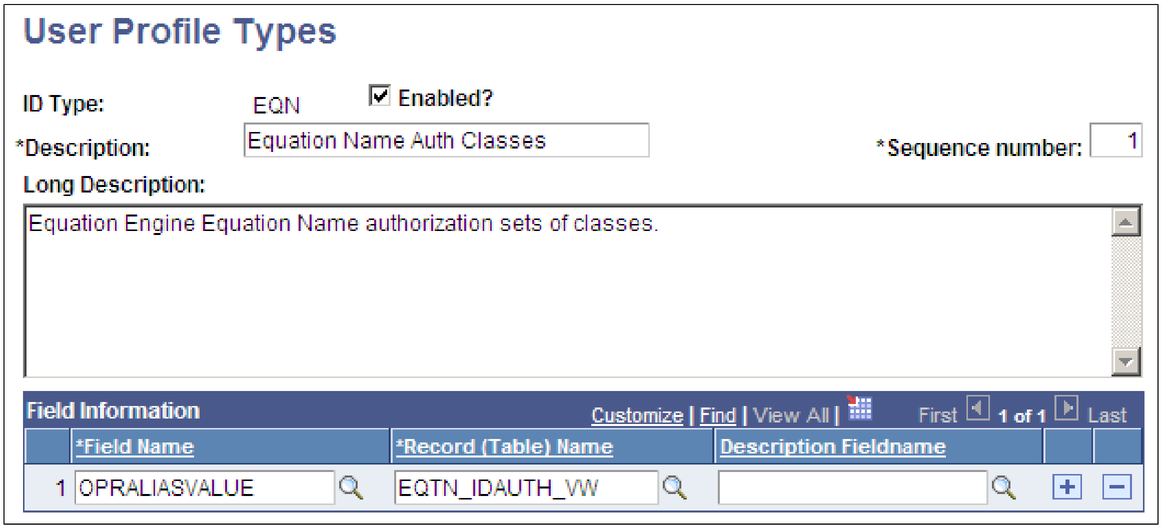
Select PeopleTools, Security, Security Objects, User Profile Types.

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



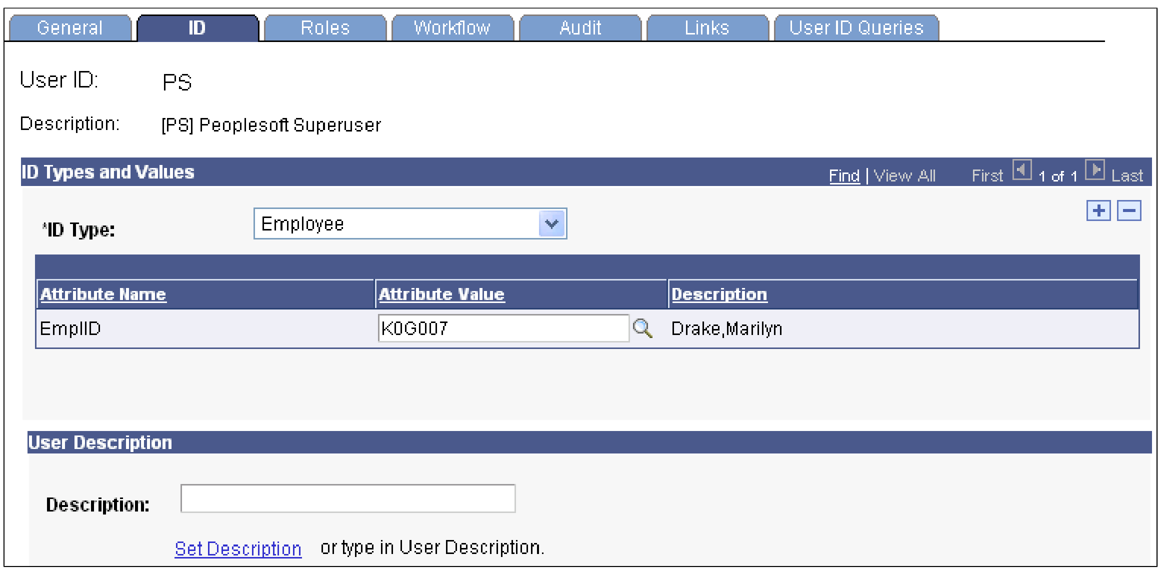
Although you would not change the user profile types, this page shows the profile types for Equation Engine:

This example illustrates the fields and controls on the User Profile Types page (2 of 2). You can find definitions for the fields and controls later on this page.



Access the User Profiles, ID tab (**PeopleTools** > **Security** > **User Profiles**).

This example illustrates the fields and controls on the User Profile page, ID tab. You can find definitions for the fields and controls later on this page.



When you select the **User Profile ID,** the system displays the descriptions shown on the previous page.

On this page, you can add equation user profile types and select a user profile value for each one that you add.

Chapter 34

Campus Solutions Application Fundamentals Reports

Campus Solutions Application Fundamentals Reports: A to Z

These tables list the Application Fundamentals reports, sorted by Report ID.

This section discusses:

- General installation reports.
- Academic institution and Student Records setup reports.

Related Links

Campus Solutions Application Fundamentals Reports: Selected Reports

General Installation Reports

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
CCDATADC Data Dictionary − Student Administration	Lists, alphabetically by field name, all fields in Campus Solutions, including the description, type, size, and format of each field. Reporting Tool: SQR	**Set Up SACR** > **Product Related** > **Student Records** > **Reports** > **Data Dictionary**	PRCSRUNCNTL

Academic Institution and PeopleSoft Student Records Setup Reports

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
SRSECVWU SA Security View Update report	Lists current component security setup data for the institution. Details such as component name, security level, and Add Search record settings are listed on the report. Use this report to get a complete snapshot of the security views data set up at the institution. Reporting Tool: SQR	**Set Up SACR** > **Security** > **Secure Student Administration** > **Process** > **Security Views Update**	RUNCTL_SRSECVWU

Campus Solutions Application Fundamentals Reports: Selected Reports

This section provides detailed information on individual reports including important fields and tables accessed.

SRSECVWU – Security Views

Field or Control	***Description***
COMPONENT	Displays the name of the component name as entered on the Security Views page.
GLOBAL	Displays the status of the Global Security check box on the Security Views page. *Yes* indicates a status of selected, *No* indicates a status of cleared.
MENUNAME	When the Global Security option is set to *NO,* or cleared, this column displays the specific menu name, as entered on the Security Views page.
BARNAME	When the Global Security option is set to *NO,* or cleared, this column displays the specific bar name, as entered on the Security page.
SECURITY LEVEL	Displays the value entered in the Security field on the Security Views page. Options include: *None, Institution, Career, Program,* and *Plan.*

Field or Control	***Description***
SEARCH RECORD	Displays the search record for the component. This value is not specified on the Security Views page. The search record is specified in PeopleSoft Application Designer on the Properties page for the component.
ADD SRCH REC (add search record)	Displays the Add searchrecord (if any) for the component. This value is not specified on the Security Views page. The Add searchrecord is specified in Application Designer on the Properties page for the component. A value of *N/A* indicates that the component has no add search record.

