

# Oracle Fusion Cloud Student Management

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**Getting Started with Your Student  
Management Implementation**

24D



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24D

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# Contents

## Get Help

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|          |                                                                                    |           |
|----------|------------------------------------------------------------------------------------|-----------|
| <b>1</b> | <b>Oracle Student Management Cloud Introduction</b>                                | <b>1</b>  |
|          | About this Guide                                                                   | 1         |
|          | Overview of Rapid Implementation for Oracle Student Management Cloud               | 1         |
|          | Overview of Working with Your System Integrator                                    | 2         |
|          | Overview of Implementing Financials for Student Management                         | 2         |
|          | Overview of Student Deployment Options                                             | 2         |
|          | Overview of Application Page Components and Analytics                              | 3         |
|          | Related Guides                                                                     | 4         |
| <b>2</b> | <b>Get Started with Oracle Student Management Cloud</b>                            | <b>7</b>  |
|          | Purchase and Activation of Oracle Fusion Cloud Applications                        | 7         |
|          | Overview of Security in Oracle Student Management Cloud                            | 8         |
|          | Overview of Enabling the Student Management Offering                               | 10        |
| <b>3</b> | <b>Oracle Student Management Cloud Implementation</b>                              | <b>13</b> |
|          | Implement Student Records                                                          | 13        |
|          | Implement Campus Community                                                         | 15        |
|          | Implement Student Financials                                                       | 17        |
|          | Implement Student Admissions                                                       | 20        |
|          | Implement Advisement                                                               | 20        |
| <b>4</b> | <b>Application Users</b>                                                           | <b>21</b> |
|          | Overview of Defining Application Users for Oracle Student Management Cloud Service | 21        |
| <b>5</b> | <b>Rapid Implementation Spreadsheets</b>                                           | <b>23</b> |
|          | Overview of Rapid Implementation Spreadsheets                                      | 23        |



# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

## Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

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For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

## Share Your Feedback

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Thanks for helping us improve our user assistance!



# 1 Oracle Student Management Cloud Introduction

## About this Guide

This document provides a high-level introduction to some best practices for implementations of Oracle Student Management Cloud Service. This guide covers the basic requirements needed to implement the Student Management offering.

The tasks presented in this document are intended for a quick introduction or pilot implementation. This document doesn't include all setup and security tasks that are appropriate for a complete implementation. References to related help accompany each of the steps. The help is available from Applications Help or from the Oracle Help Center, unless specified otherwise.

## Overview of Rapid Implementation for Oracle Student Management Cloud

Use the Rapid Implementation process to quickly upload setup data using spreadsheets.

Here's what the rapid implementation setups for Student Management include:

- Academic Structures
- Academic Periods
- Facilities
- Academic Staff
- Curriculum Registry Configuration
- Curriculum Registry Items
- Student Tuition Calendar
- Student Due Date Calendar
- Student Fees
- Academic Period Fees
- Student Fee Discounts
- Administrative Service Indicators and Impacts
- External Organizations

### *Related Topics*

- [Rapid Implementation for Oracle Student Management Cloud](#)

## Overview of Working with Your System Integrator

After you determine the offerings you want to implement, implement Oracle Financials prerequisites first to ensure dependencies with other offerings are met.

Your system integrator uses his or her implementation expertise to help you with a smooth transition to the Oracle Student Management Service, and can use Rapid Implementation procedures to help you achieve a successful implementation in the fastest time possible.

**Note:** If you plan to continue using an Oracle Applications Unlimited Campus Solutions application in coexistence with Oracle Student Management Service, you won't follow this order of implementation. Contact your system integrator to determine the order to implement your offering.

## Overview of Implementing Financials for Student Management

Student Management uses Oracle Financials Cloud to support its financial processes like managing student receivables, billing, collections, and cashiering.

Before you implement Student Management, you have to set up these components in Financials to enable Student Management to create charges, invoices, and record receipts:

- Enterprise Structures and General Ledger (GL)
- Receivables
- Payables
- Payments

For information on setting up Financials for Student Management, see the Oracle Student Management Cloud Implementing Student Management guide.

### *Related Topics*

- [Overview of Financials Implementation for Student Management](#)

## Overview of Student Deployment Options

You can deploy Oracle Fusion Cloud Student Management Cloud using one of two options.

Here are the deployment options:

- **Public Cloud:** Services are available to the general public and offered on a subscription basis, with no requirements to buy additional licenses or support. The services are hosted over the Internet by Oracle or Oracle business partners that offer business process outsourcing (BPO) solutions.

- Private Cloud: Application-and technology-managed services that are offered for Oracle software and hardware and are available internally, behind a firewall. The services are hosted over the Internet by Oracle or Oracle business partners that offer BPO solutions. Oracle provides management, monitoring, patching, security, and upgrade services.

## Overview of Application Page Components and Analytics

Application pages contain several sections.

Here are the sections:

- Navigation tools in the global area at the top of the page
- Content and task panel drawers on the left side of the page that reveal pages with additional tasks and content
- Task and search panel drawers on the right side of the page
- Reports panel drawer on the right side of the page
- Transactions area, where most work is conducted, in the center of the page

In addition to embedded analytics, you may have access to dashboards with additional analytics as well as the Reports and Analytics work area where you can access or create further analyses.

### Embedded Analytics

Embedded analytics enable actionable insight by providing access to information or data which helps complete a transaction.

### Real-Time Reporting

Real-time reporting accesses relevant reports and analytics for each individual work area. Predefined analyses are available, but you can also create and edit analyses from the Reports panel drawer or the Reports and Analytics work area. Optionally, access the Oracle Business Intelligence (BI) Enterprise Edition through the Reports panel drawer. New objects and changes to existing objects that you make in Oracle BI Enterprise Edition are reflected and available from Oracle Student Management Cloud Service.

### Interactive Dashboard

Interactive dashboards provide these things:

- Information summaries that show a view of the big picture as well as prioritization
- Information monitoring that offers quick action and further exploration

The main dashboard within Oracle Student Management is the Welcome dashboard, which is a collection of dashboards. Two other types of dashboards are also available:

- Transaction dashboards which contain content that's core to one or more business processes

- Business intelligence (BI) dashboards which contain content that's complementary to one or more business processes

## Related Guides

You can refer to these guides as you implement Oracle Student Management Cloud.

### Implementation Guides

Here are the related guides used during implementation.

| Guide                                                                                       | Description                                                                                                                                   |
|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Oracle Student Management Cloud Getting Started with Your Student Management Implementation | Provides a high-level introduction to some best practices for implementations of Oracle Student Management Cloud.                             |
| Oracle Student Management Cloud Implementing Student Management                             | Contains conceptual information and procedures needed to implement components and features of Oracle Student Management Cloud.                |
| Oracle Student Management Cloud Securing Student Management                                 | Contains information to help setup users and sales administrators configure access to Oracle Student Management Cloud functionality and data. |
| Oracle Applications Cloud Security Reference for Common Features                            | Lists the predefined security data that's included in the Student Management offering.                                                        |

### Configuration Guides

Here's a common cloud configuration guide.

| Guide                                                            | Description                                                    |
|------------------------------------------------------------------|----------------------------------------------------------------|
| Oracle Applications Cloud Configuring and Extending Applications | Describes the tools and concepts for configuring applications. |

### Common Applications Guides

You may want to consult these guides for common features.

| Guide                                                       | Description                                                            |
|-------------------------------------------------------------|------------------------------------------------------------------------|
| Oracle Applications Cloud Getting Started with Oracle Cloud | Outlines the basics of getting started with your Oracle cloud service. |

| Guide                                                         | Description                                                                                                                                                                                    |
|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Oracle Applications Cloud Using Functional Setup Manager      | Describes how to use Oracle Functional Setup Manager to implement applications, setting up security to use it, and describes the Offerings, Features, Business Process, and Related Documents. |
| Oracle Applications Cloud Understanding Enterprise Structures | Explains how to use the Oracle Applications Cloud enterprise structures to meet your company's legal and management objectives.                                                                |
| Oracle Applications Cloud Using Common Features               | Provides an overview of the application functionality that's common across the applications.                                                                                                   |



## 2 Get Started with Oracle Student Management Cloud

### Purchase and Activation of Oracle Fusion Cloud Applications

Purchase, activate, and manage services for Oracle Fusion Cloud Applications services.

The process involves:

- Purchasing and activating your services.
- Verifying that the services are activated, monitoring the services, and performing other administrative tasks.

The documentation relevant to your subscriptions depends on which console your cloud service uses.

See: *Which Console Documentation Should I Use?*

- Oracle Cloud Classic (My Services) Console:
  - Purchasing and activating services is described in *Oracle Cloud: Getting Started with Oracle Cloud*.
  - Many administrative tasks are covered in *Oracle Cloud: Managing and Monitoring Oracle Cloud*.

**Note:** Not everything in these guides is relevant to Oracle Fusion Cloud Applications, for example details about Oracle Java Cloud Service and Oracle Database Cloud Service.

- Oracle Cloud Console: See *Applications Services*.

All of the following references point to one of these guides.

### Terminology and User Privileges

- Before you proceed, you should understand terms that are used in documentation about Oracle Cloud.

See: *Oracle Cloud Terminology*

- You should also be familiar with privileges for users of the Oracle Cloud website or of the actual service.

See: *Learn About Cloud Account Roles*

### Service Purchase and Activation

- Your buyer or an Oracle sales representative orders a cloud service and specifies information about the account administrator during the ordering process.

See: *Order Oracle Cloud Applications*

- The account administrator receives an email with a link to activate the service. As part of activation, the account administrator provides information about the administrator who performs the functions of both the service

administrator and the identity domain administrator. The documentation to refer to depends on which console your cloud service uses.

See: *Which Console Documentation Should I Use?*

- Oracle Cloud Classic (My Services) Console: *Activate Your Oracle Cloud Applications Order*
- Oracle Cloud Console: *Activating Your Oracle Cloud Applications Order*

## Service Availability in US Government Regions

If you are in noncommercial regions within the US, contact your Oracle account or sales representative for details about service and feature availability in your regions.

## Alternative Versions of Specified Oracle Services

From time to time, at Oracle's sole discretion, Oracle may make alternative versions of specified Oracle services available for customers to access on a limited basis. These alternative versions may not have the same feature sets as the versions of these services for which a fee is paid, and Oracle may terminate and no longer make available these alternative versions at any time.

## Next Steps

- The administrator who was identified during the activation process:
  - Manages and monitors the service. The documentation to refer to depends on which console your cloud service uses.  
See: *Which Console Documentation Should I Use?*
    - Oracle Cloud Classic (My Services) Console:
      - *My Account Administration*
      - *Performing Service-Specific Tasks*
    - Oracle Cloud Console: *Fusion Applications Environment Management*
  - Optionally create initial administrator and implementation users before enterprise structures setup. Alternatively, the administrator sets up enterprise structures and then creates service users, including functional implementors.
- Functional implementors perform configuration and setup steps.
- Developers can add features to extend the application.
- Your cloud service will be updated on a regular basis. See *Oracle Applications Cloud - Fusion Applications Update Policy (Doc ID 1966109.1)* on My Oracle Support.

## Overview of Security in Oracle Student Management Cloud

Users of Oracle Student Management Cloud have roles through which they gain access to functions and data.

Security implementation mainly involves management of the following:

- Roles
- Application users
- The provisioning of roles to application users

Student Management application users typically have abstract roles, such as Instructor or Registrar.

This topic introduces the key security-related tasks that you perform during implementation. For more information about any of these tasks or Oracle Student Management Cloud security in general, see the *Securing Oracle Student Management Cloud* guide.

## Define Implementation Users

The Oracle Student Management Cloud service administrator creates one or more implementation users, who perform the implementation tasks. To create implementation users and the data roles that they need, the service administrator performs these tasks:

- Run Users and Roles Synchronization Process  
This task copies data from the LDAP directory to the Oracle Fusion Applications Security tables, so that existing roles are available for implementation users.
- Create Implementation Users
- Create Data Role for Implementation Users

At least one implementation user must have the IT Security Manager job role or privileges. That implementation user performs security-related implementation tasks.

## Define Security Synchronization Processes and Preferences

Many security-related tasks are performed on the Security Console. The tasks in the Define Security Synchronization Processes and Preferences task list initialize the Security Console. This table introduces those tasks.

| Task                                             | Description                                                                                                                                             |
|--------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage Application Security Preferences          | Opens the Security Console, where you perform setup tasks such as setting the enterprise password policy and defining the default format of user names. |
| Import Users and Roles into Application Security | Runs a process that initializes and maintains the Oracle Cloud Applications Security tables.                                                            |
| Import User Login History                        | Runs a process that imports the history of user access to Oracle Cloud Applications. This information is required by the Inactive Users Report.         |

## Define Security

Oracle Student Management Cloud is secure as delivered. To enable application users to access Oracle Student Management Cloud functions and data, you perform the tasks in the Define Security for Student Management task list, as appropriate.

You can perform most of these tasks both during implementation and later as requirements emerge. Here are the tasks:

- Revoke Data Role from Implementation Users

Implementation users need unrestricted access to large amounts of data. After implementation, you must remove Student Management implementation data roles from implementation users. A user with the IT Security Manager job role or privileges performs this task.

- Manage Job Roles

- Review the role hierarchy of a job or abstract role.
- Create job and abstract roles.
- View the roles assigned to a user and identify the users who have a specific role.

Manage Job Roles opens the Security Console. A user with the IT Security Manager job role or privileges performs this task.

- Manage Duties

Use the Manage Duties task to do these things:

- Review the role hierarchy of a job or abstract role.
- Create job and abstract roles.
- View the roles assigned to a user and identify the users who have a specific role.

Manage Duties opens the Security Console. A user with the IT security manager job role or privileges performs this task.

## Manage Role Provisioning

You create role mappings to control the provisioning of all types of roles to application users. For example, you can create a role mapping to provision the Student abstract role automatically to all admitted students. A user with the IT Security Manager job role performs this task, which opens the Manage Role Mappings page.

# Overview of Enabling the Student Management Offering

To start an implementation of Oracle Student Management Cloud, a user with the Application Implementation Consultant role (ORA\_ASM\_APPLICATION\_IMPLEMENTATION\_CONSULTANT\_JOB) must opt into the offerings applicable to your business requirements.

Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

## Student Management Offering

Use this offering to configure the functional areas for Student Management.

This table specifies the primary functional areas of this offering. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering.

| Functional Area       | Description                                                                                        |
|-----------------------|----------------------------------------------------------------------------------------------------|
| Academic Structures   | Configure academic structures including institutions, facilities, and academic staff.              |
| Student Structures    | Configure student structures including tuition and fees and personal data.                         |
| Curriculum Structures | Configure curriculum structures including result sets, program types, and curriculum tags.         |
| Admissions Structures | Configure overall admissions settings, as well as admissions application forms and action reasons. |

## Student Management Springboard Icons

When implementors enable the Student Management offering, these icons appear on the springboard:

- Catalog
- Curriculum
- Academic Tools

You can also see icons for other applications and features, depending on your implementation.

### Related Topics

- [Configure Offerings](#)
- [Plan Your Implementation](#)



# 3 Oracle Student Management Cloud Implementation

## Implement Student Records

Users with the Application Implementation Consultant job role perform each Student Records setup task. These tables list the Student Records setup tasks in three areas: Academic Structures, Curriculum Structures, Curriculum Items.

| Sequence | Task                              | Description                                                                                                                                                                                                                                                                                                           |
|----------|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1        | Manage Academic Institution       | Create and maintain institutions. For an organizational structure such as an institutional system or consortium, an academic institution might not be the highest level entity. For an organizational structure that doesn't include a system office or consortium, an institution is often the highest level entity. |
| 2        | Manage Academic Campuses          | Create and maintain campuses. A campus can be both a physical and organizational entity.                                                                                                                                                                                                                              |
| 3        | Manage Learning Catalogs          | Create and maintain learning catalogs. Use the Learning Catalog feature to create student home pages with your own branding.                                                                                                                                                                                          |
| 4        | Manage Academic Organizations     | Create and maintain academic organizations. Academic organizations represent the various schools or divisions that are part of your institution.                                                                                                                                                                      |
| 5        | Manage Academic Subjects          | Create and maintain academic subjects. Academic subjects identify a distinct discipline, field of study, or the main topic of a course.                                                                                                                                                                               |
| 6        | Manage Academic Levels            | Create and maintain academic levels, such as undergraduate or graduate, which you can attach to curriculum items.                                                                                                                                                                                                     |
| 7        | Manage Academic Period Attributes | Create and maintain date attributes that are used to define academic periods. An academic period is the date foundation for scheduling courses and student enrollment.                                                                                                                                                |
| 8        | Manage Academic Periods           | Create and maintain academic time periods to document dates and deadlines for enrollment, learning, and other activities at your institution.                                                                                                                                                                         |

| Sequence | Task                                         | Description                                                                                                                                                                  |
|----------|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 9        | Manage Period Sequence                       | Create and maintain a chronological sequence of academic reporting periods that mirrors the institutional calendar.                                                          |
| 10       | Manage Academic Staff                        | Assign academic staff to an institution and academic organization. The assignments will allow staff members to perform various tasks.                                        |
| 11       | Manage Buildings                             | Create and maintain buildings for scheduling course meetings and other learning activities.                                                                                  |
| 12       | Manage Facilities                            | Create and maintain rooms for scheduling course meetings and other learning activities.                                                                                      |
| 13       | Manage Academic Credentials                  | Create and maintain the credentials, such as a certificate, that the institution might offer. A credential is awarded to a student after the successful completion of study. |
| 14       | Manage Service Impacts                       | Create service impacts which you can map to enrollment actions.                                                                                                              |
| 15       | Manage Administrative Service Impact Mapping | Map service impacts to predefined enrollment actions.                                                                                                                        |

| Sequence | Task                             | Description                                                                                                                                                            |
|----------|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1        | Manage Result Sets               | Create and maintain the values that will be used for learner grades and other types of results.                                                                        |
| 2        | Manage Result Types              | Create and maintain the types of results that will be stored and tracked for learners.                                                                                 |
| 3        | Manage Drop Schemes              | Create and maintain drop schemes to map a drop type to an enrollment status and, where relevant, a penalty result.                                                     |
| 4        | Manage Curriculum Build Statuses | Create and maintain build statuses for curriculum items. Build status indicates the life-cycle stage, such as pending approval, of a curriculum item such as a course. |
| 5        | Manage Curriculum Tags           | Create and maintain curriculum tags and attach them to curriculum items to display items in particular categories and order in student self-service pages.             |

| Sequence | Task                             | Description                                                                                                                                                                                                     |
|----------|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6        | Manage Program Types             | Create and maintain program types, such as major or minor, to use when you create programs.                                                                                                                     |
| 7        | Manage Program Action Reasons    | Create and maintain program action reasons to associate with program actions for reporting purposes and to provide useful information to staff when they review a student's record.                             |
| 8        | Manage Requirement Categories    | Create and maintain requirement categories to indicate how a program element such as a course will be incorporated into a program.                                                                              |
| 9        | Manage Requisite Schemes         | Create requisite schemes to map requisite statuses to result outcomes.                                                                                                                                          |
| 10       | Manage Enrollment Action Reasons | Create and maintain enrollment action reasons.                                                                                                                                                                  |
| 11       | Manage Curriculum Templates      | Create and maintain templates to streamline the process of creating courses. A template defines required and optional elements for data such as basic attributes, descriptive text, and scheduling information. |

| Sequence | Task                  | Description                          |
|----------|-----------------------|--------------------------------------|
| 1        | Create Course         | Create and maintain courses.         |
| 2        | Create Course List    | Create and maintain course lists.    |
| 3        | Create Academic Group | Create and maintain academic groups. |
| 4        | Create Program        | Create and maintain programs.        |

## Implement Campus Community

Users with the Application Implementation Consultant job role perform each Campus Community setup task. The tasks don't have a specific order.

| Page or Task Name                            | Navigation                                                                                                                                                               | Description                                                                                                                                                                                                                                            |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage Service Impacts                       | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Service impacts identify the types of specific services that are restricted or provided. Examples of service impacts can include transcript holds, stopping course enrollment, and allowing use of the gym.                                            |
| Manage Administrative Service Indicators     | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Service indicators consist of one or more service impact values. Examples of service indicators can include library fine, nonpayment of tuition fee, and early enrollment.                                                                             |
| Identifiers                                  | From Student Central, click <b>Search</b> and search for <b>Student Management Identifiers</b> .                                                                         | Create and maintain identifiers to represent ID numbers and codes issued by national and local regulatory bodies, accreditation, and other professional organizations. Assign identifiers to entities such as institutions and external organizations. |
| Contacts                                     | From Student Central, click <b>Search</b> and search for <b>Contacts</b> .                                                                                               | Create and maintain person contact details such as default job title and department. Assign contacts to entities such as institutions and external organizations.                                                                                      |
| Locations                                    | From Student Central, click <b>Search</b> and search for <b>Locations</b> .                                                                                              | Create and maintain locations. Assign locations to entities such as institutions and external organizations.                                                                                                                                           |
| Manage Attribute Tags                        | From Student Central, click <b>Search</b> and search for <b>Tags</b> .                                                                                                   | Create and maintain general or service hold tags. Examples of tags can be military, athlete, and library service hold.                                                                                                                                 |
| Manage Population Selection Process Contexts | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Population Selection returns a list of persons and their related data, which batch processes can use for further processing. An example of batch processing with Population Selection is enrollment for multiple students.                             |
| Manage Student Management Lookups            | From Student Central, click <b>Search</b> and search for <b>Manage Student Management Lookups</b> .                                                                      | Set up lookups, for example, residency lookups include residency statuses, exceptions, and exception reasons.                                                                                                                                          |
| Manage Address Formats                       | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Modify the layout of fields in the student address page. For example, you can set fields as required or modify the field labels.                                                                                                                       |
| Manage National Identifier Types             | From Student Central, click <b>Search</b> and search for <b>National Identifier Type</b> .                                                                               | Configure types of national identifiers.                                                                                                                                                                                                               |
| Student Management Categories                | From Student Central, click <b>Search</b> and search for <b>Student Management Categories</b> .                                                                          | Create categories to associate with academic tools such as communications.                                                                                                                                                                             |

| Page or Task Name                                                                            | Navigation                                                                                                                                                                | Description                                                                                                                                                                                   |
|----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Communications                                                                               | From Student Central, click <b>Search</b> and search for <b>Communications</b> .                                                                                          | Configure the notification content that the cloud application automatically sends to students. For example, the notification that's sent to a student, when the student enrolls for a course. |
| Status Schemes                                                                               | From Student Central, click <b>Search</b> and search for <b>Status Schemes</b> .                                                                                          | Set up status schemes to create groups of statuses for use within tasks.                                                                                                                      |
| Task Management                                                                              | From Student Central, click <b>Search</b> and search for <b>Task Management</b> .                                                                                         | Set up tasks and checklists for applicants and students, such as submitting a recommendation letter.                                                                                          |
| Branding                                                                                     | From Student Central, click <b>Search</b> and search for <b>Specify Branding and Colors</b> .                                                                             | For the Student Management pages, add a logo of the academic institution and select a branding color.                                                                                         |
| Manage Administrator Profile Values                                                          | In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task.                                                                               | Set up the locale preferences, such as date and time formats, for students and applicants.                                                                                                    |
| Manage Time Zone Settings                                                                    | From Student Central, click <b>Search</b> and search for <b>Manage Time Zone Settings</b> .                                                                               | Set up multiple global time zones for your institution.                                                                                                                                       |
| Age Settings                                                                                 | From Student Central, click <b>Search</b> and search for <b>Age Settings</b> .                                                                                            | Configure age limits to identify a person as fully managed, jointly managed, or self-managed.                                                                                                 |
| Configure Person Relationship Type                                                           | From Student Central, click <b>Search</b> and search for <b>Configure Person Relationship Type</b> .                                                                      | Determine the relationships that users can establish between students and group managers in a managed student group.                                                                          |
| Create External Organizations in Spreadsheet<br>Upload External Organizations in Spreadsheet | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Academic Structures</li> </ul> | Create organizations that are external for your academic institution, such as high schools, universities, sponsorship organizations, and so on.                                               |

## Implement Student Financials

Users with the Application Implementation Consultant job role perform each Student Financials setup task.

**Note:** Student Financials uses functionality from these Oracle Fusion Cloud Financials products: Accounts Receivable, General Ledger, and Payables.

| Sequence | Page or Task Name                          | Navigation                                                                                                                                                               | Description                                                                                                                                     |
|----------|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| 1        | Manage Student Financials Options1         | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Define level transaction and receipt numbering, accounts receivable values, and self-service payment options.                                   |
| 2        | Manage Miscellaneous Categories            | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up miscellaneous categories of fees and group fees within them.                                                                             |
| 3        | Manage Student Financials Academic Periods | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up academic period defaults and assign an academic period to charges, using start and end dates.                                            |
| 4        | Manage Adjustment Calendars                | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up adjustment calendars to enable subsequent creation of adjustment schedules.                                                              |
| 5        | Manage Due Date Calendar                   | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up due dates related to adjustment calendars.                                                                                               |
| 6        | Discounts                                  | From Student Central, search for <b>Discounts</b> .                                                                                                                      | Create and manage discounts used throughout a business unit.                                                                                    |
| 7        | Manage Academic Period Fees                | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Create and manage fees that enable a bursar to calculate a student's fee based on the summarized billing units for a reporting academic period. |
| 8        | Fee Groups                                 | From Student Central, search for <b>Fee Groups</b> .                                                                                                                     | Create and edit fee groups containing a set of academic                                                                                         |

| Sequence | Page or Task Name                     | Navigation                                                                                                                                                               | Description                                                                                                                         |
|----------|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
|          |                                       |                                                                                                                                                                          | period fees for a reporting academic period.                                                                                        |
| 9        | Manage Fee Group Default Settings     | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Assign a default fee group to an academic level.                                                                                    |
| 10       | Manage Adjustment Schedules           | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Create and edit adjustment schedules.                                                                                               |
| 11       | Manage Due Date Schedule              | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up due dates related to adjustment schedules.                                                                                   |
| 12       | Manage Curriculum Fees                | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up course fees and course section fees.                                                                                         |
| 13       | Manage Miscellaneous and General Fees | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up categories to group miscellaneous fees; these categories of grouped fees are used in self service.                           |
| 14       | Manage Curriculum Costs               | In the Setup and Maintenance work area, use: <ul style="list-style-type: none"> <li>Offering: Student Management</li> <li>Functional Area: Student Structures</li> </ul> | Set up curriculum cost items for an institution (such as instructor fee or room rental), and define how those costs are calculated. |

*Related Topics*

- [Overview of Implementing Oracle Financials Cloud](#)

## Implement Student Admissions

Users with the Application Implementation Consultant job role perform each Student Admissions setup task. The tasks don't have a specific order.

| Task                                           | Description                                                                                             |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Manage Student Management Lookups              | Set up lookups, for example, application lookups include descriptive meanings, and start and end dates. |
| Specify Admissions Settings                    | Define undeclared program parameters and admission activation reasons.                                  |
| Manage Admissions Application Action Reasons   | Define admissions actions that are used during application evaluations.                                 |
| Manage Admissions Application Form Definitions | Create and manage application forms, and view submitted applications.                                   |

## Implement Advisement

Users with the Application Implementation Consultant job role perform each Advisement setup task.

Refer to the Advisement chapter in the Implementing Student Management guide.

## 4 Application Users

### Overview of Defining Application Users for Oracle Student Management Cloud Service

Application users are the intended users of the Oracle Student Management Cloud service. They inherit appropriate abstract roles, such as Employee and Line Manager. They also inherit job roles, such as Instructor and Registrar, from locally defined data roles.

These abstract and job roles enable application users to perform their tasks.

Here are some Student Management job roles:

- Bursar
- Instructor
- Registrar
- Student

### Preparing for Application Users

Many implementation tasks are about preparing your Oracle Student Management Cloud service for application users. The decisions you make during this phase determine how you manage users by default. You perform these tasks:

- Manage Application Security Preferences
  - Defines the default format of user names for the enterprise.
  - Sets the enterprise password policy.
  - Manages the notification of user and password events, such as password expiration, to application users.
- Manage Enterprise Student Management Information

Sets these options for the enterprise:

| Option                         | Description                                                                                                               |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| User Account Creation          | Controls whether user accounts are created automatically when a person record is created using the New Person task flows. |
| User Account Role Provisioning | Controls whether role provisioning and deprovisioning requests are processed by default.                                  |
| User Account Maintenance       | Controls whether requests to suspend and reactivate user accounts are processed by default.                               |

| Option | Description |
|--------|-------------|
|        |             |

**Tip:** Some enterprises use applications other than Oracle Student Management Cloud to manage user and role provisioning. In this case, you set the User and Role Provisioning options to prevent automatic creation and management of user accounts.

## Setting Up Default Role Provisioning

Role provisioning rules, also known as role mappings, determine which data and abstract roles users can have and how they acquire them. During implementation, you create role mappings to provision standard roles, such as Employee and Line Manager, automatically to application users. You can also create some data roles and create appropriate role mappings for them. Perform the Manage Role Provisioning Rules task to create role mappings.

## Creating Application Users

During implementation, you can create test application users:

- Using the Create User task.
- On the Security Console, if you have the IT Security Manager job role or privileges.

When the implementation is complete, application users can be created automatically in these situations:

- If a person record is created using a New Person task flow, such as Hire an Employee or Add a Contingent Worker. By default, human resource specialists and line managers can perform the New Person tasks. Whether user accounts are created for new person records is controlled by the **User Account Creation** enterprise option.
- If a prospect creates a new account in self-service.

When user accounts are created, roles are provisioned to them automatically, as specified by current role mappings.

For more information about application users, roles, and role mappings, see the Securing Oracle Student Management Cloud guide.

# 5 Rapid Implementation Spreadsheets

## Overview of Rapid Implementation Spreadsheets

You can upload business object data in bulk for Oracle Student Management Cloud using rapid implementation spreadsheets.

### Student Records

Rapid implementation is available in these Student Records areas:

Academic Structures:

- Academic Structures
- Academic Periods
- Facilities
- Academic Staff

Curriculum Structures:

- Curriculum Registry Configuration
- Curriculum Registry Items

### Student Financials

Rapid implementation is available in these Student Financials areas:

- Student Tuition Calendar
- Student Due Date Calendar
- Student Fees
- Academic Period Fees
- Student Fee Discounts

### Campus Community

Rapid implementation is available in these Campus Community areas:

Student Structures: Administrative Service Indicators and Impacts

Academic Structures: External Organizations

#### *Related Topics*

- [Rapid Implementation for Oracle Student Management Cloud](#)

