PeopleSoft®

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook

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PeopleSoft 8 SP1
Campus Community Fundamentals PeopleBook
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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*.
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 W.
`Monospace font`	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (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.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** — Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Campus Community Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or application.

PeopleSoft Application Fundamentals

The *PeopleSoft Campus Community PeopleBook* provides an overview of the Campus Community setup tables, and describes many features that are basic building blocks for both PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook.* Each PeopleSoft application has its own version of this documentation.

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

See Also

PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook

CHAPTER 1

Getting Started With PeopleSoft Campus Community

This chapter provides an overview PeopleSoft Campus Community, and discusses PeopleSoft Campus Community implementation.

PeopleSoft Campus Community Overview

Individuals and organizations are the foundation of PeopleSoft Student Administration Solutions and Contributor Relations Solutions. You use PeopleSoft Campus Community to create the records for the individuals and organizations that comprise your institution's community. After you create the records, you use Campus Community to continue to update, maintain, and track information about the individuals and organizations associated with your institution.

PeopleSoft Campus Community Implementation

You must design and implement PeopleSoft Campus Community before you can fully implement PeopleSoft Student Administration Solutions or Contributor Relations Solutions.

Note. For full implementation planning, you will also want to take advantage of all PeopleSoft sources of information, including installation guides, table-loading sequences, data models, and business process maps.

In the planning phase of your implementation, you must carefully consider how to design names, addresses, and other basic elements in Campus Community for consistent use across your institution. These design decisions provide the framework for creating all people and organization records.

See .

To implement PeopleSoft Campus Community, you must set up tables and options to support the management of unique IDs and to support the following Campus Community business processes.

Maintaining Bio/Demographic Data

Bio/Demo data enables you to create records for individuals and enter the name, address, telephone, and birthdate data that describes them. You can further identify the individual by entering ethnicity, citizenship, and religious preferences data. You can also track languages, relationships, and work experience for individuals.

See Chapter 5, "Setting Up Bio/Demographic Data," page 47.

Managing FERPA

FERPA functionality enables you to provide and track the student's ability to control the release of their personal data, as required by the Family Educational Rights and Privacy Act.

See Chapter 7, "Setting Up FERPA Control," page 65.

Managing Service Indicators

Service indicator functionality enables you to assign a positive or negative indicator to an individual's record to identify services that are available to or should be denied for that individual.

See Chapter 6, "Setting Up Service Indicators," page 57.

Managing the 3Cs – Communications, Checklists, and Comments

Campus Community's 3Cs enable you to create and track communications to individuals or organizations, to create and monitor checklists of items required of an individual, and to enter comments. You can use the 3C engine to automate the assignment and tracking of communications and checklists.

See Chapter 13, "Setting Up Communications," page 111.

See Chapter 15, "Setting Up Checklists," page 129.

See Chapter 14, "Setting Up Comments," page 125.

Managing Identification Data

Identification data enables you to post photos of individuals and enter other data about items that officially identify individuals in the community at large, including driver's licenses, residency status, visas and permits, and citizenship and passports.

See Chapter 8, "Setting Up Identification Data," page 73.

Managing Participation Data

Participation data enables you to enter and track an individual's athletic participation, extracurricular activities, honors and awards, and licenses, certificates, and memberships.

See Chapter 10, "Setting Up Participation Data," page 91.

Managing Health Data

Health data enables you to track immunization and health test data and to track accommodation requests.

See Chapter 9, "Setting Up Health Data," page 81.

Managing Services Data

Services data enables you track individuals' current and legacy relations to your institution. Services data also enables you to identify an individual as deceased. In addition, you can use services data to enter external system IDs and personal identification numbers (PINs).

See Chapter 32, "Managing Services Data," page 401.

Managing Organization Data

Organization functionality enables you to create records for organizations, including identifying an organization's location, departments, and contacts data.

See Chapter 11, "Setting Up Organization Data," page 97.

Managing Committee Data

Committee data enables you to assign members to committees and assign tasks to them.

See Chapter 16, "Setting Up Committee Templates," page 139.

Managing Events Data

Events data enables you schedule one or several meetings within an event, reserve facilities and resources for each, and invite attendees. You can also track attendance.

See Chapter 17, "Setting Up Events," page 143.

CHAPTER 2

Designing PeopleSoft Campus Community

This chapter provides an overview of designing PeopleSoft Campus Community and discusses how to:

- Review PeopleSoft Campus Community installation settings.
- Review country and state settings.
- Set up PeopleSoft Campus Community/PeopleSoft Human Resources Management (HRMS) shared elements.
- Establish salutations.
- Establish address usages.
- Establish phone usages.
- Establish campus locations.
- Establish national ID numbers.
- Establish ID delete control.
- Establish Search/Match criteria.
- Establish Family Educational Rights and Privacy Act (FERPA) control.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Reviewing Your Installation Setup and System Defaults”

Designing Campus Community

Before you can fully implement PeopleSoft Campus Community, you must verify settings and establish elements for people and organization processing.

- Verify that your system’s default settings reflect your institution’s design decisions and reset them if they do not.

  Reviewing these settings can provide insight into some of the values that your system automatically displays or formats. For example, reviewing the ID settings in the Installation Table component (described in the *PeopleSoft Student Administration and Contributor Relations Solutions Fundamentals PeopleBook*) helps you identify where seed numbers are set for the automatic sequencing and assigning of ID numbers. Reviewing the country, state, and province codes (described in this chapter) ensures that the ones your institution uses are available and that the standard address format set to appear for each, will serve your institution’s needs.
- Set up name and address formats and identify types to manage individual names and addresses.

- Create usages to identify which types of names or addresses to use in specific circumstances.
- Review the National ID table to determine if the predefined national ID numbers, which PeopleSoft ships, include the identification numbers for the countries and formats that your institution requires.

  National ID numbers provide a method of identifying and tracking individuals. PeopleSoft ships national ID number formats predefined per country, including United States social security numbers (SSNs) and Canadian social insurance numbers (SINs).
- Establish salutations for use in communications with those individuals in your system, set priority criteria to control the addition and deletion of records in your system, and specify the sets of data to use to detect duplicate or multiple records.
- Designate the types of information to control about individuals so that all departments in your institution can use the system to comply with government privacy regulations and any internal privacy policies.

After you establish these basics, you can create records and begin using the full functionality of PeopleSoft Student Administration Solutions.

Warning! Before adding records or entering and updating data, you must be familiar with PeopleSoft applications, including the Add, Update/Display, Include History, and Correct History modes and the PeopleSoft method of applying effective dates with active or inactive statuses.

See *PeopleTools PeopleBook, Using PeopleSoft Applications, "Understanding Effective Dates"*

Reviewing PeopleSoft Campus Community Installation Settings

This section discusses how to review or define PeopleSoft Campus Community default installation settings.

Prerequisites

Some tables are delivered with predefined values in them so that default installation values can be established. If you must change default settings (for example for event types, salutations, address types, new user registration data, and so on) and the values that you desire are not available, you can modify or add values to those tables.

See Also

Chapter 17, "Setting Up Events," Defining Event Types, page 144

Chapter 2, "Designing PeopleSoft Campus Community," Establishing Salutations, page 27

Chapter 20, "Maintaining Bio/Demographic Data," Entering Basic Bio/Demo Data, page 178

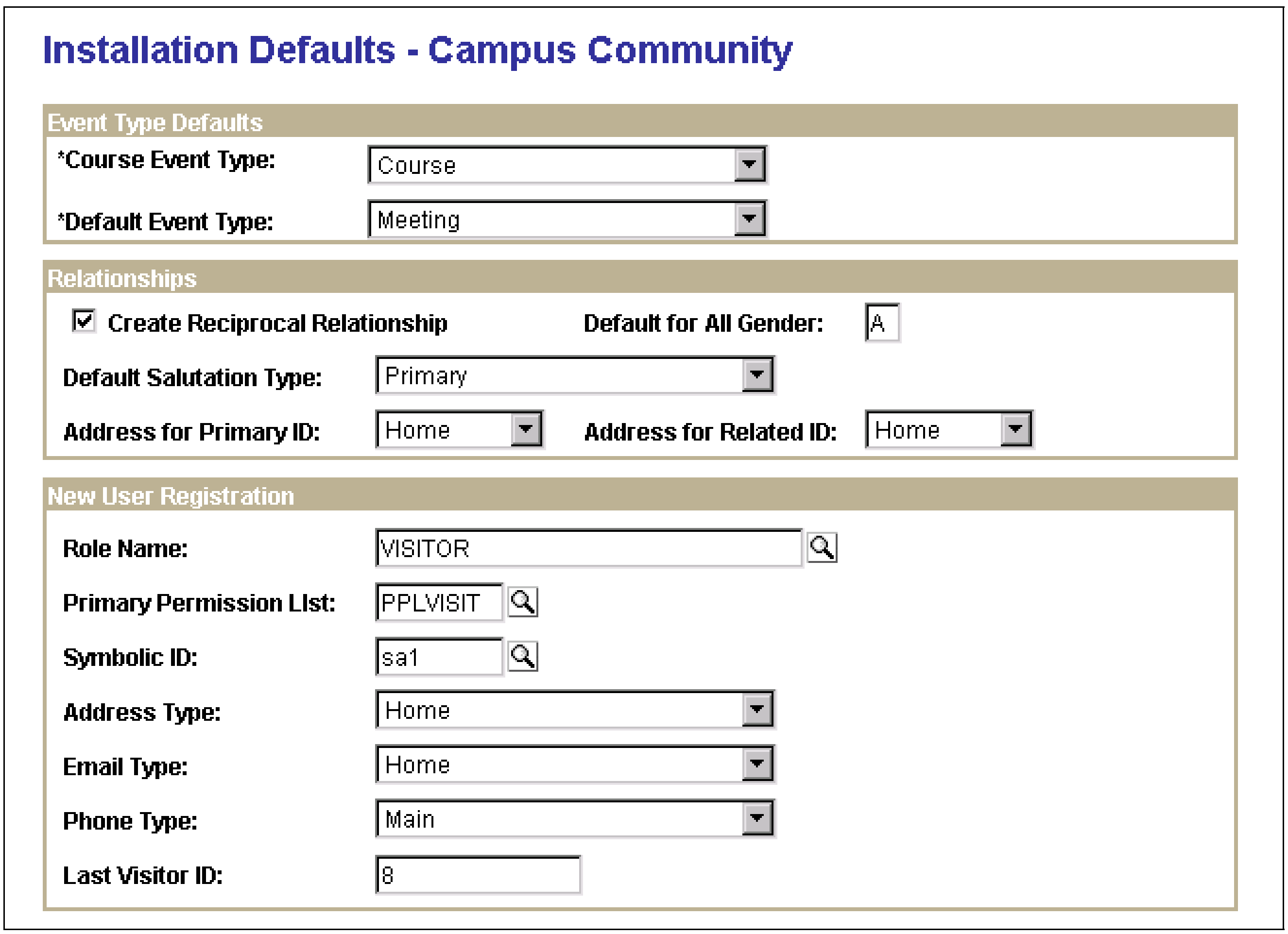
Chapter 39, "Using PeopleSoft Community Access Collaborative Application," Investigating New User Registration Data, page 504

Page Used to Review PeopleSoft Campus Community Installation Settings

Page Name	Object Name	Navigation	Usage
Installation Defaults – Campus Community	INSTALLATION_CC	Design Student Administration, Define Campus Community, Setup, Installation Defaults – CC, Installation Default – CC	Review or define PeopleSoft Campus Community default installation settings.

Reviewing or Defining PeopleSoft Campus Community Default Installation Settings

Access the Installation Defaults – Campus Community page



Installation Default – Campus Community page

Event Type Defaults

Course Event Type The default value is *Course.* Do *NOT* change this value.

PeopleSoft Student Records treats courses as events. Therefore, the Course Event Type field must be set to *Course* so that you can schedule classes.

Default Event Type The default value is *Meeting.*

You can override this value (using the Events component) if your institution wants to set a different default value for the type of event.

Relationships

Create Reciprocal Relationship The default value is selected, which means that when you create a relationship on the Relationships page between a primary ID and another ID (the related ID), the system automatically creates the reciprocal relationship between the related ID and the primary ID.

For example, if you create a relationship between Mary Smith (the primary ID, as the mother) and Denise Strauss (the related ID, as the daughter), the system automatically creates the reciprocal relationship for Denise Strauss, identifying her as daughter with a relationship to Mary Smith, as mother.

If you clear this check box, only Mary Smith's record reflects the mother/daughter relationship.

Default for All Gender The default value is*A* (all). Do *NOT* change this value.

The system uses the value in this field to create the reciprocal relationship. Changing the value here changes genders throughout your system, which you may not intend to do.

Default Salutation Type The default value is *Primary.*

The system displays and uses this value, which appears by default from the Joint Salutation Type page, as the salutation for two people with a relationship that are set up to receive joint communications on the Relationships page.

Address for Primary ID The default value is *Home.*

When you create a relationship between two individuals on the Relationship page, the system uses this value to display an address for the primary ID individual on the Relationship Address page.

For example, with the default value set to *Home,* the system displays the home address for the primary ID as defined on the Addresses page, unless otherwise instructed.

Address for Related ID The default value is*Home.*

When you create a relationship between two individuals on the Relationships page, the system uses this value to display an address for the related ID individual on the Relationship Address page.

For example, when the value is *Home,* the system displays the home address for the related ID as defined on the Addresses page, unless otherwise instructed.

New User Registration

Values in this area are relevant only if your institution licenses and uses PeopleSoft Community Access Collaborative Application to provide self-service transactions. Use these fields as needed.

See Also

Chapter 39, "Using PeopleSoft Community Access Collaborative Application," page 495

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Introducing Collaborative Applications"

Reviewing Country and State Settings

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions deliver extensive lists of predefined countries, country codes, and country address format labels. The countries and country codes are consistent with those recognized by the International Standards Organization (ISO) at the time of this publication.

The system uses options on the Address Format page to construct the standardized address format for each country. PeopleSoft Campus Community places the country code field first on address pages so that when you select a valid country code, the system dynamically changes the address format to the standard format for the country you select. You can add countries or modify the existing formats, including renaming the labels that display for each field in a format.

Note. To determine which countries are already listed, run the Country Table Report (PER708).

This section discusses how to:

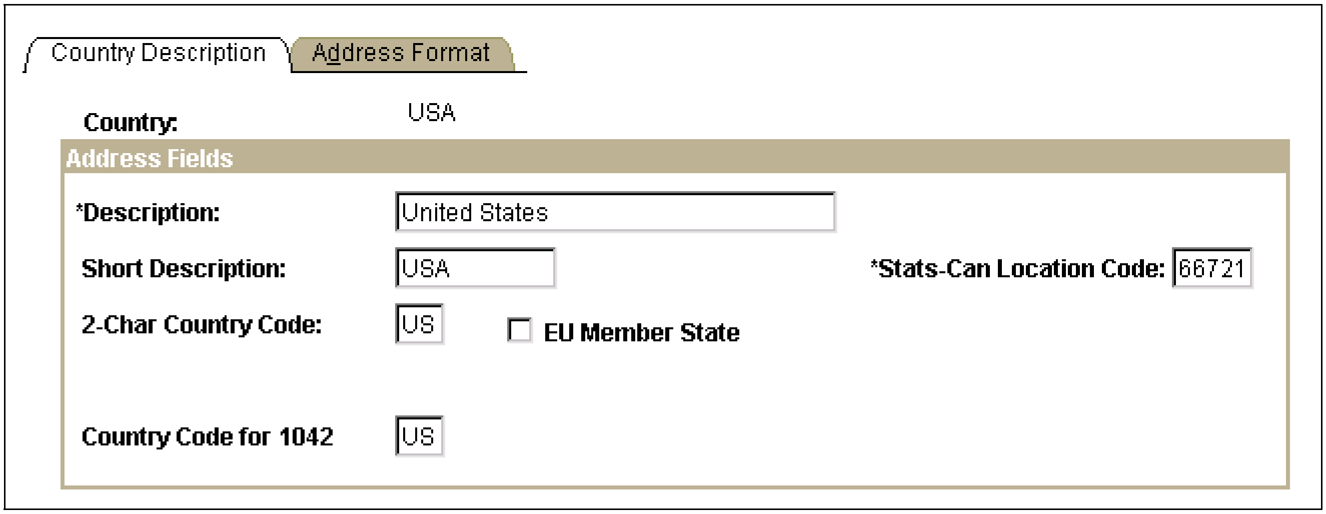
- Review or define country descriptions and state settings.
- Review or define country address formats.
- Review or define state or province codes.

Pages Used to Review Country and State Settings

Page Name	Object Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Define Business Rules, Define General Options, Setup, Country Table, Country Description	Review or define country descriptions and codes.
Address Format	ADDR_FORMAT_TABLE	Define Business Rules, Define General Options, Setup, Country Table, Address Format	Review or define country address formats.
State or Province Table	STATE_NAMES_TABLE	Define Business Rules, Define General Options, Setup, State or Province Table, State or Province Table	Review or define state or province codes for a country.

Reviewing or Defining Country Descriptions and Codes

Access the Country Description page.



Country Description page

Stats-Can Location Code Intended for Canadian higher education degree-granting institutions only. The system displays the Statistics Canada country location code (used on the PeopleSoft HRMS FRA INSEE Table page and Canada Academic Teaching Survey reports).

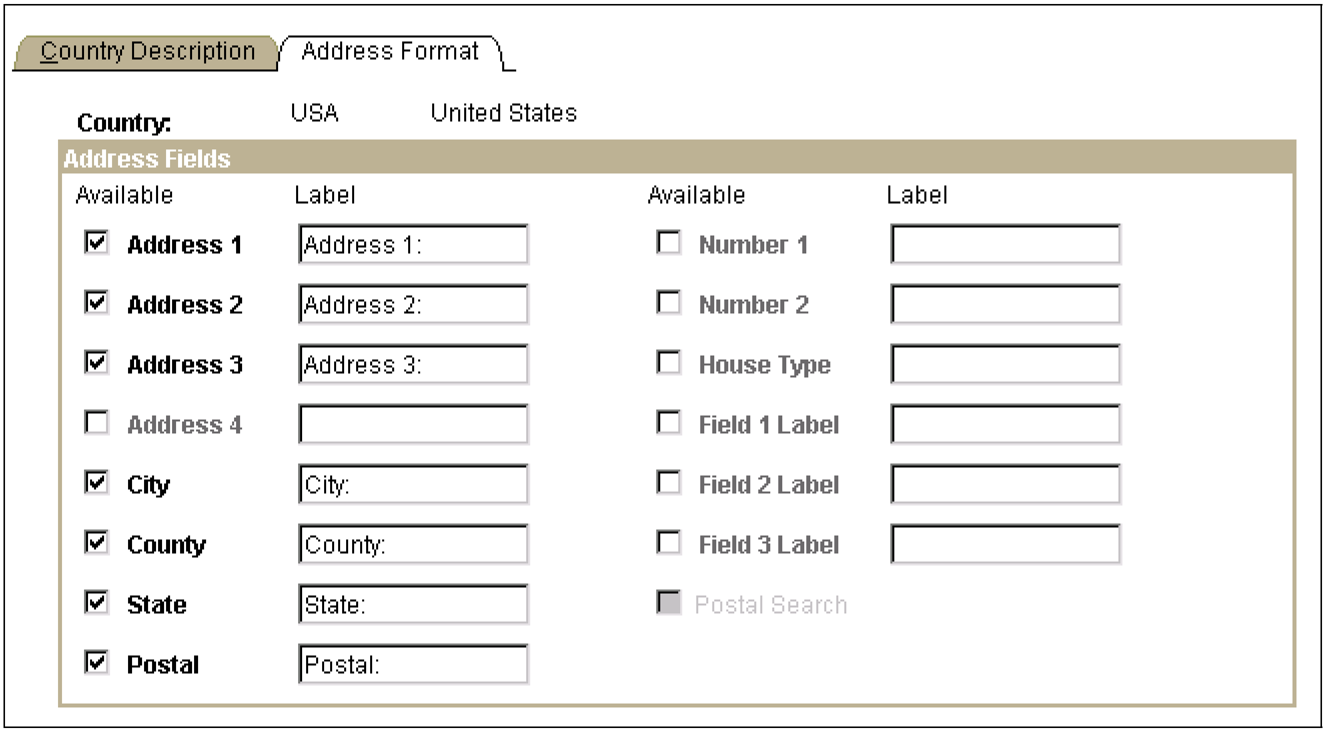
2-Char Country Code Displays the two-character country code that the United States government assigned to the country.

EU Member State Indicates that this country is a member of the European Union (EU). The system uses EURO conventions to translate currencies for this country when this check box is selected.

Country Code for 1042 For use by only PeopleSoft HRMS.

Reviewing Country Address Formats

Access the Address Format page.



Address Format page

Available Indicates that the corresponding address field and its label should be included in the standard address format for this country.

Label Indicates the text to display for the corresponding field.

Postal Search Activates the postal search functionality for Dutch, Japanese, or United Kingdom addresses. For the U.K., fields in the GB Systems Information group box are available for entry.

GB Systems Information

This group box appears for United Kingdom addresses only (Country is *GBR*). Complete these fields if you have Information Toolkit (IMTK) installed and configured. With this information management application installed, you can look up United Kingdom addresses by entering a postal code and, optionally, a house name or number.

National Registry Directory Indicates the location of the data files containing the postal code information.

Configuration File Prefix Indicates the location of the configuration file (PS_GBSYS.INI) that PeopleSoft delivers.

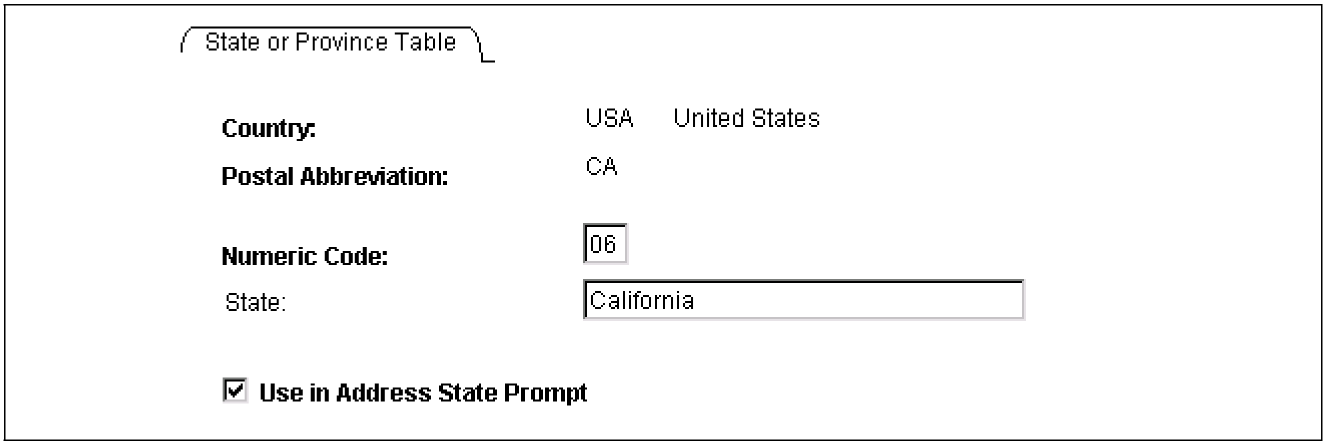
See Also

PeopleSoft HRMS Installation Guide

PeopleSoft Information Management Toolkit User Guide

Reviewing State or Province Codes

Access the State or Province Table page.



State or Province Table page

Numeric Code

The numeric code for this state.

State (or Province)

The full name of the state or province.

Use in Address State Prompt

Indicates that this state should be included in the prompt list of valid states for this country.

To prevent a province from being included in the list, clear this check box.

Note. Currently the Use in Address State Prompt check box is used in prompt lists in PeopleSoft self-service applications only. State prompt lists on administrative pages include all states associated with a country.

Setting Up PeopleSoft Campus Community/HRMS Shared Elements

This section provides an overview of PeopleSoft Campus Community and PeopleSoft HRMS shared elements and discusses how to:

- Define regulatory regions.
- Define job codes.
- Identify physical locations for jobs at your institution.
- Enter phone numbers for job locations.
- Enter a job location profile.
- Define job code tasks.
- Identify internal departments.

Understanding PeopleSoft Campus Community and HRMS Shared Elements

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions leverage some functionality from PeopleSoft HRMS. Consequently, some fields in PeopleSoft Campus Community are shared with PeopleSoft HRMS. Some fields appear in both PeopleSoft Campus Community and PeopleSoft HRMS, but they function differently in each place to best perform within that application. If your institution licenses and uses PeopleSoft HRMS, review information in this section and share it with your human resources department.

When you license and use PeopleSoft Student Administration Solutions and PeopleSoft HRMS, PeopleSoft Student Administration Solutions takes precedence. Functions, pages, and fields that appear in both applications, if used by PeopleSoft Student Administration Solutions, function as described in your PeopleSoft Student Administration Solutions documentation. If the function, page, or field appears in both applications, but is not used by PeopleSoft Student Administration Solutions, your PeopleSoft Student Administration Solutions documentation refers you to your PeopleSoft HRMS documentation.

Several field values in PeopleSoft Campus Community are defined using the PeopleSoft HRMS pages delivered with PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions. For example, job codes, job locations, and job code tasks are set up on HRMS pages and used on the Accommodation Job Task page in PeopleSoft Campus Community.

If your institution has purchased PeopleSoft Human Resources, you will require these fields. Your human resources administrators should read the PeopleSoft HRMS documentation and set these up as described there.

If your institution has not purchased PeopleSoft Human Resources, some fields on the PeopleSoft Campus Community pages may be optional. You may not find these fields useful, but you should know about them and set them up just in case.

Pages Used to Set Up PeopleSoft Campus Community /HRMS Shared Elements

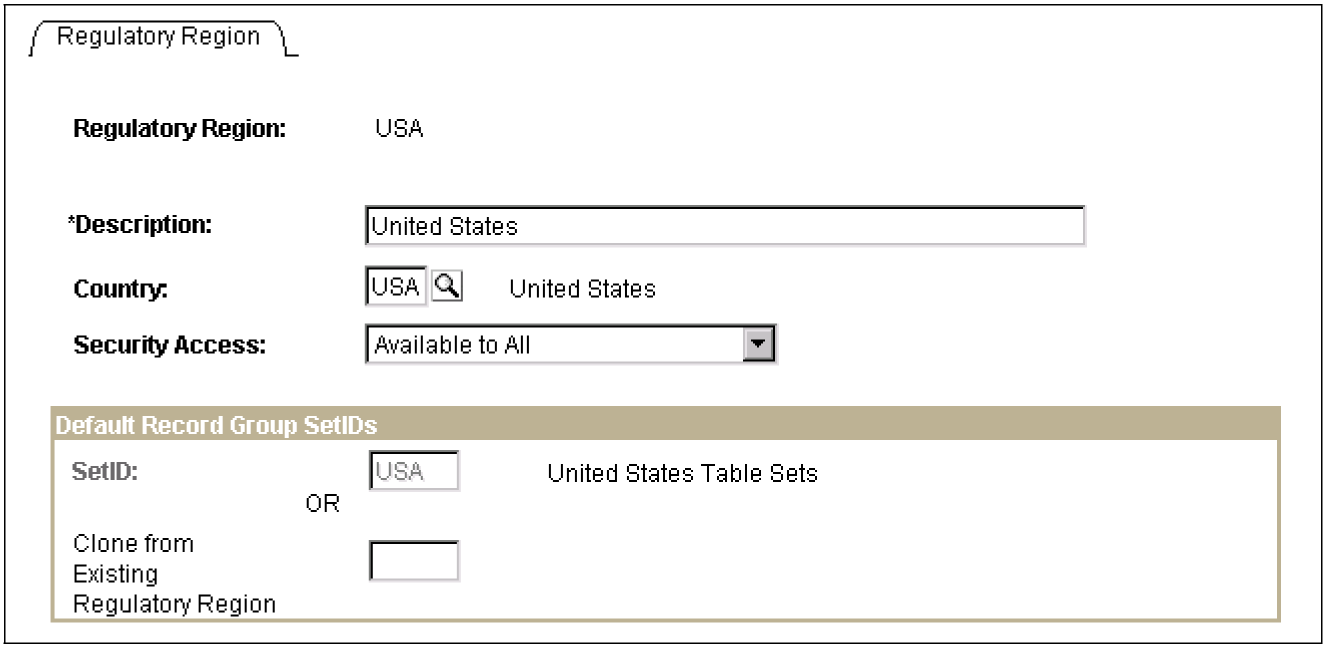
Page Name	Object Name	Navigation	Usage
Regulatory Region	REG_REGION	Define Business Rules, Administer HR System, Setup, Regulatory Region, Regulatory Region	Define or review regulatory region descriptions and security access. Your system is delivered with regulatory regions predefined for Canada, United States, Canadian provinces, and other areas. If you must set up additional regulatory regions, use this page.

Page Name	Object Name	Navigation	Usage
Job Code Profile	JOBCODE_TBL1_GBL	• Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Job Code Profile • Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Job Code Profile • Develop Workforce, Plan Careers, Setup, Job Code Table, Job Code Profile	Define or review job codes. Job codes are used on PeopleSoft Campus Community's Accommodation Job Task page.
Business Units by Location	LOC_BU_SEC	Click the Business Units that Use this SetID link on the page.	Review business units by location to determine which business units use the specific setID.
Location Address	LOCATION_TABLE1	• Design Student Administration, Establish People Processing, Setup, Location Table, Location Address • Define Business Rules, Manage Human Resources (GBL), Setup, Location Table, Location Address	Identify or review physical locations for a job, such as headquarters, satellite campuses, or remote recruiting offices. Job locations are used on PeopleSoft Campus Community's Accommodation Job Task page.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter a phone number and fax number for a job's physical location.

Page Name	Object Name	Navigation	Usage
Job Code Task Table	JOBCODE_TASK_TABLE	• Develop Workforce, Recruit Workforce (GBL), Setup, Job Code Task Table, Job Code Task Table • Develop Workforce, Recruit Workforce (USF), Setup, Job Code Task Table, Job Code Task Table • Monitor Workplace, Report Regulations (UK), Setup, Job Code Task Table, Job Code Task Table • Monitor Workplace, Report Regulations (US), Setup, Job Code Task Table, Job Code Task Table • Monitor Workplace, Report Regulations (USF), Setup, Job Code Task Table, Job Code Task Table	Define or review job tasks associated with a job code. Job code tasks are used on PeopleSoft Campus Community's Accommodation Job Task page.
Department Profile	DEPARTMENT_TBL_GBL	Define Business Rules, Manage Human Resources (GBL), Setup, Department Table, Department Profile	Identify an internal business entity or department. Departments are used on PeopleSoft Campus Community's Service Indicator Data1 and Organization Communication 2 pages.

Defining Regulatory Regions

Access the Regulatory Region page.



Regulatory Region page

A regulatory region can be any region where there are specific laws and regulations addressed by functionality in PeopleSoft Human Resources. There are many country-specific transactions driven by regulatory requirements where regulatory region is used for transaction processing. Such requirements include areas such as ethnicity, disability, health and safety, and others. When driven by regulatory region, the regulatory codes, PeopleCode edits, and set processing in the system varies by country and per transaction. This functionality is especially helpful for organizations that have a multinational workforce. PeopleSoft Campus Community uses regulatory regions on the Accommodation Request page.

Note. Although the scope of a regulatory region can be smaller than a country, the recommended standard regulatory region setting is at the country level.

Warning! Consult with your PeopleSoft account manager before modifying existing regulatory regions.

Description Enter a description for the regulatory region that you are defining. The system displays this description whenever you reference this regulatory region code.

Country Select a country. When you create a regulatory region, you must indicate the country within which that the region falls. Specifying the country enables country specific edits even when a state/provincial level region is used in a system transaction.

Note. If the country that you want to add is not in the list of valid values, you must first add that country to the system using the Country Table

Security Access PeopleSoft Student Administration Solutions customers will probably want to select either *Available to All* or *Not Available to Anyone* to provide or deny universal access to regulatory regions. To simplify maintenance, availability is established only once per regulatory region and is used for all transactions.

Available To All: Select when you want all users to be able to select this regulatory region.

Not Available To Anyone: Select when you want no users to be able to select this regulatory region.

With Global Security Only: Select when you want only users with that regulatory region's country established in Global Security (Define Business Rules, Administer HR System, Use, Maintain Global Security) to be able to select that regulatory region.

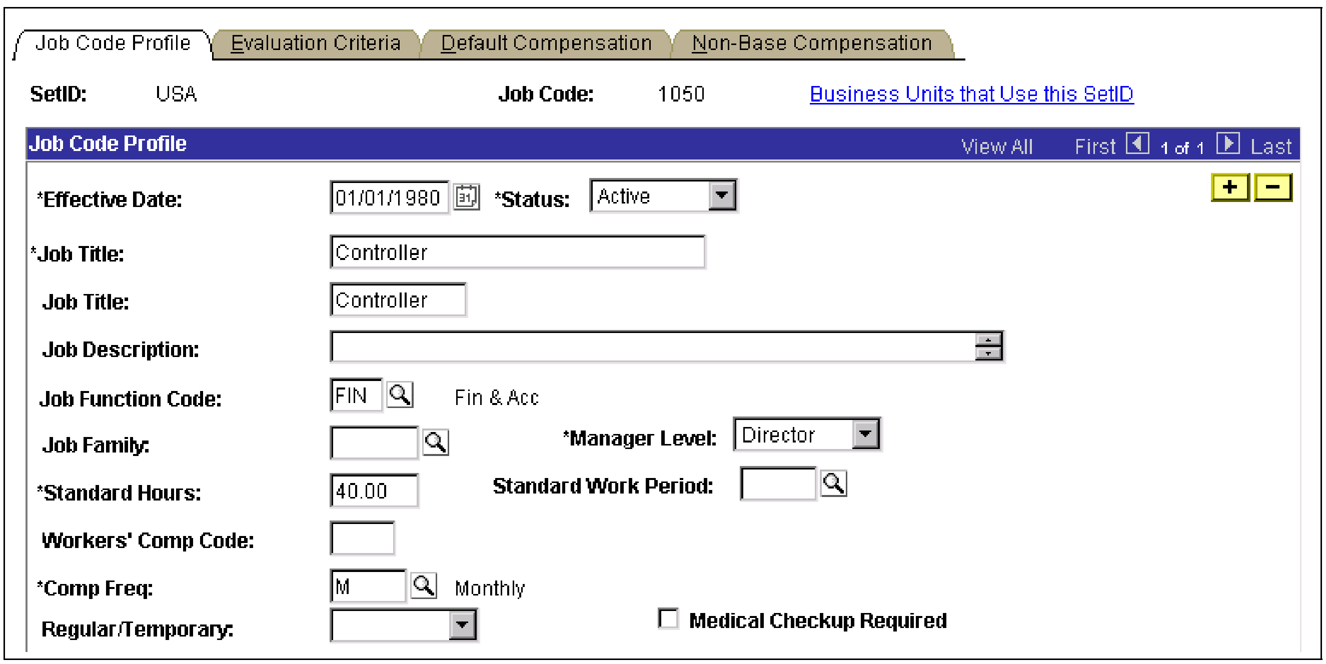
Default Record Group SetIDs

SetID Enter a setID to be used for this regulatory region.

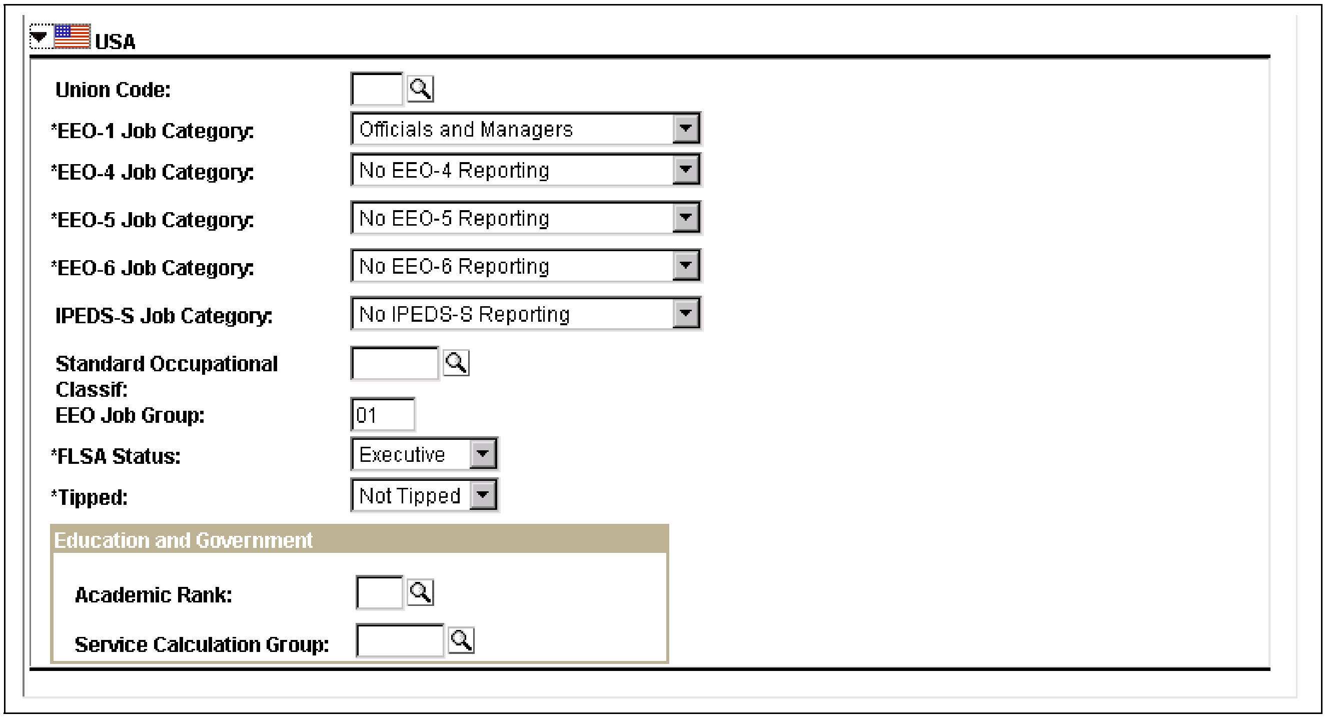
Clone from Existing Regulatory Region Select a setID that you want to use as a clone for this regulatory region.

Defining Job Codes

Access the Job Code Profile page.



Job Code Profile page (1 of 2)



Job Code Profile page (2 of 2)

Job Title — Enter the complete title in the first Job Title field and an abbreviated title in the second Job Title field.

Job Description — Enter a description of the duties and responsibilities associated with this job. This is a scrollable field; you can enter up to 250 characters.

Manager Level — The default value is *Non-Mgr* (non-manager), which you can override. Other values include *Vice President, Director, Mid-level Manager,* and *Supervisor.*

Standard Hours — Enter the number of standard hours per week that a person in this job works at your institution.

Standard Work Period — Select the standard work period from the available options or frequency IDs.

Workers' Comp Code (workers' compensation code) — Enter a worker compensation code for this job, if applicable.

Comp Freq (compensation frequency) — Select the frequency with which a person in this job is paid at your institution.

Regular/Temporary — Select whether this job is *Regular* or *Temporary.*

Medical Checkup Required — Select to indicate that a medical checkup is required for this job.

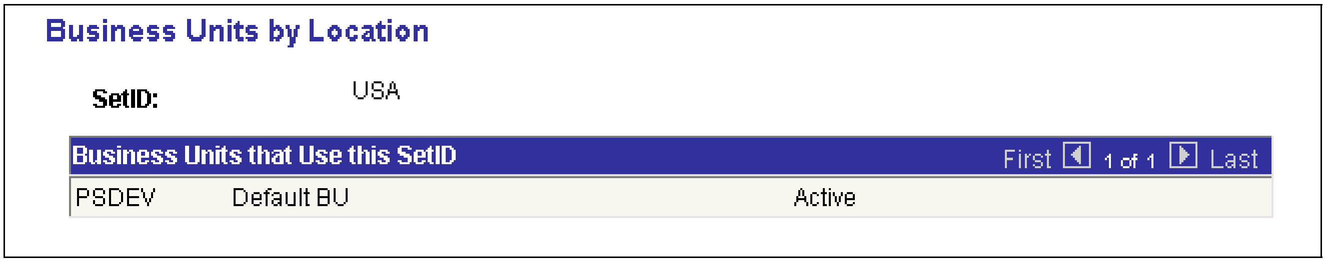
USA

Add union and equal employment opportunity (EEO) information here. In the Education and Government group box, you can select an academic rank and service calculation group for this job. The information could be important if your institution is using PeopleSoft HRMS; however, it is not relevant or required for PeopleSoft Student Administration Solutions or PeopleSoft Contributor Relations Solutions.

Business Units that Use this SetID Click to access the Business Units by Location page, where you can see what other business units use the setID that you selected.

Reviewing Business Units by Location

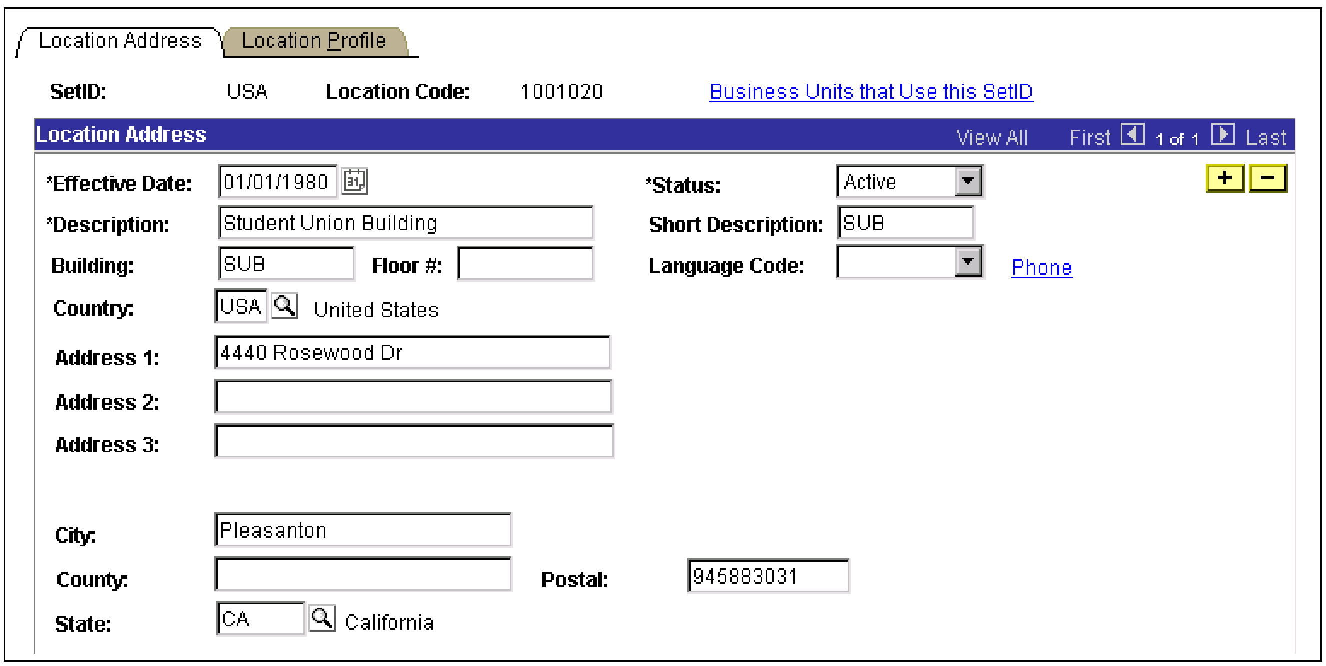
Access the Business Units by Location page.



Business Units by Location page

Identifying Physical Locations for Jobs Within Your Institution

Access the Location Address page.



Location Address page

Note. Do not confuse this location page with the Location Addresses page where you set up campus location addresses.

Building Enter the name of the building or other description for the building at this location.

Floor # Enter a floor number if required to define this location.

Language Code Select an official language for this location.

Country

Select a country. When you exit the field, the system displays address fields in the appropriate standardized format (from the Address Format page) for the country you selected.

See Chapter 2, “Designing PeopleSoft Campus Community,” Reviewing Country and State Settings, page 9.

Business Units that Use this SetID

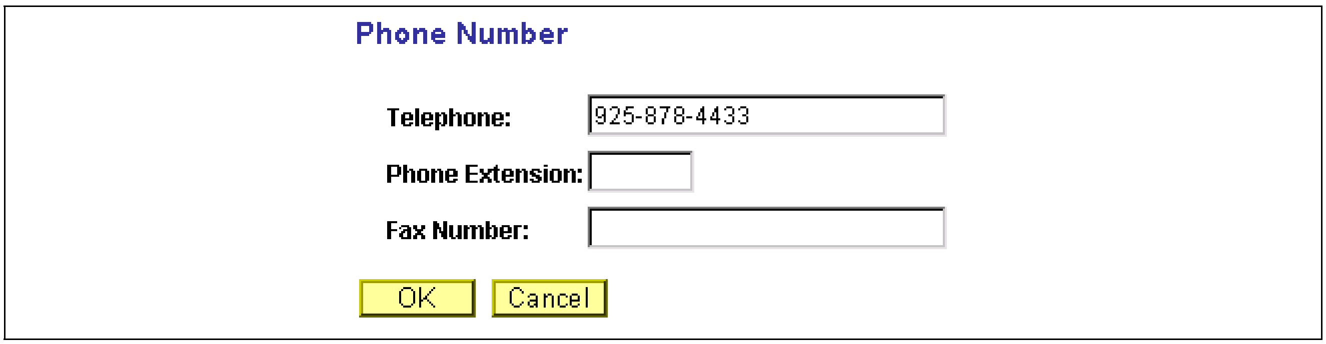
Click to access the Business Units by Location page, where you can see what other business units use the setID that you selected.

Phone

Click to access the Phone Number page, where you can enter a phone number and fax number for this location.

Entering Phone Numbers for Job Locations

Access the Phone Number page.



Phone Number page

Enter the telephone, phone extension, and fax number for the location address that you are defining on the Location Address page.

Entering a Job Location Profile

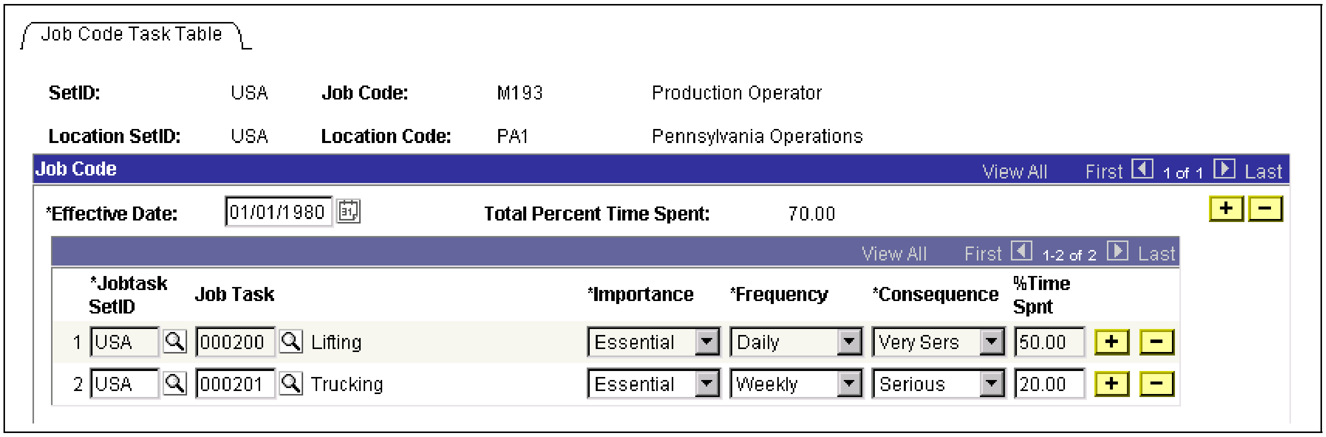
Access the Location Profile page to enter or review a location profile.

See Also

PeopleSoft Human Resources Management System PeopleBooks

Defining Job Code Tasks

Access the Job Code Task Table page.



Job Code Task Table page

SetID, Location SetID, and **Location Code**
Using these values you can associate different sets of job code tasks with different locations. As a result, you can limit the job code task values that you see on the Accommodation Job Task page to those values associated with the location that you specify here.

Total Percent Time Spent
The system calculates the total percentages of time spent on the job tasks that you list and displays that total here. This value cannot exceed 100 percent.

Job Task
Select all the job tasks that a person in this job would perform. You can add as many rows as necessary.

Importance
Select the importance of this job task for the job: *Essential* or *Marginal.*

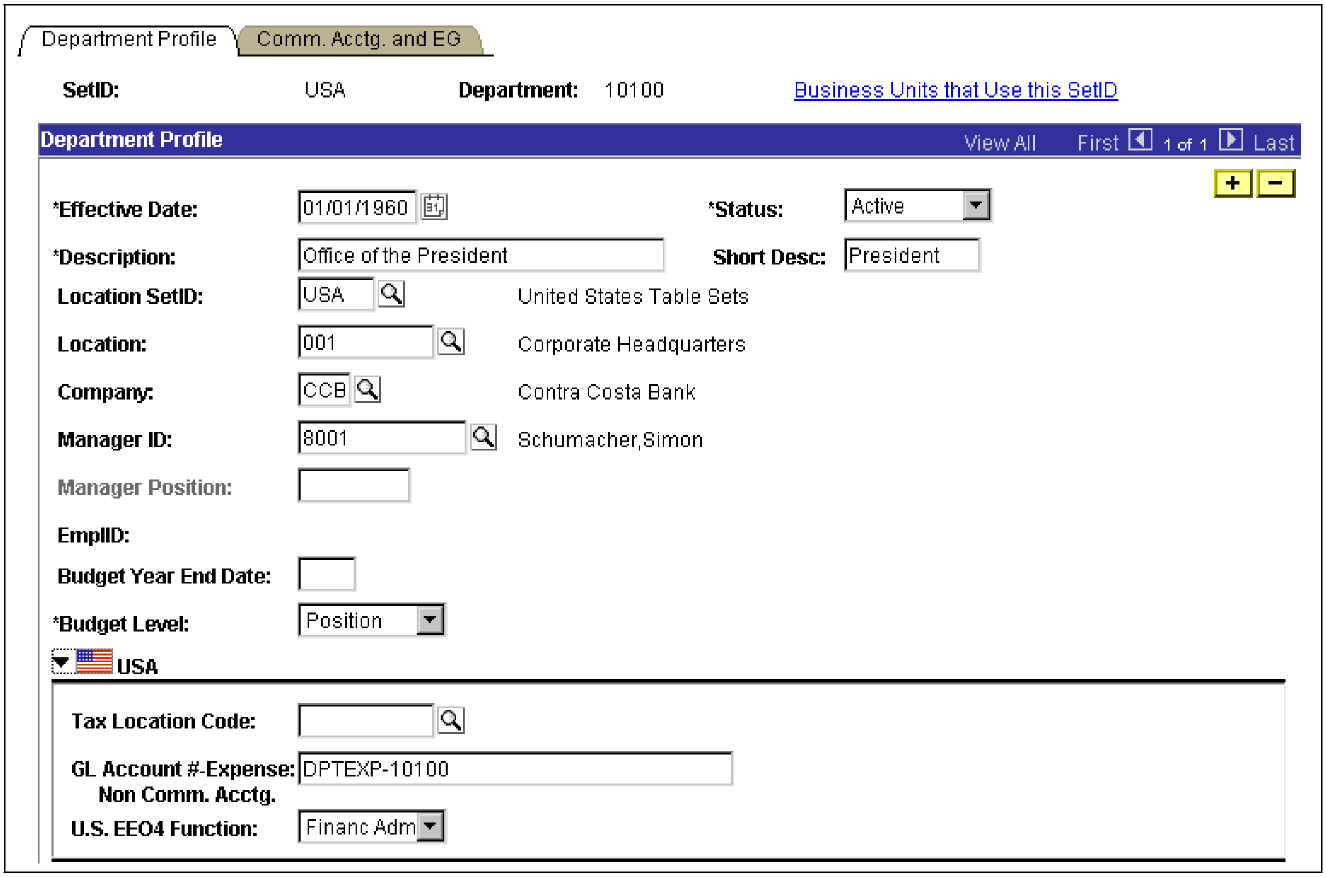
Frequency
Select how frequently a person does this job task: *Daily, Hourly, Monthly, Weekly,* or *Yearly.*

Consequence
Select the consequence of not doing this job task: *Very Minor, Minor, Serious, Quite Sers* (quite serious), *Very Serious.*

% Time Spent (percent time spent)
Enter the percentage of time spent on this job task.

Identifying Internal Departments

Access the Department Profile page.



Department Profile page

Effective Date

If you add a new department to the Department table from the Manage Human Resources window, remember to set its effective date to pre-date (or to be equal to) the effective date of your security tree.

Location

Select the location for this department. Set up locations on the Location Address page.

Company

Enter the academic institution.

If you do *not* enter a value for company here, you can enter one on the Job Data pages. If you *do* enter a value for company here, you cannot change it in the Job Data pages.

Manager ID

Enter the ID of the person who is the manager of this department. The ID you select becomes the default ID on the records assigned to this department. If you select a manager ID, you cannot enter a manager position.

Manager Position

Select the position that you want to designate as the manager position. If you select a manager position, you cannot enter a manager ID.

The system currently allows you to select any position. If you want the system to prompt only with positions in this department, update the DEPT_TBL in PeopleSoft Application Engine so that the prompt table for this field is DEPT_POSITIONS.

USA

Enter information related to departments in the United States.

Setting Up Name Formats and Usage

This section provides an overview of name formats and usages and discusses how to:

- Define name usages.
- Set up name prefixes.
- (Optional) Set up name suffixes.

Understanding Name Formats and Usages

Names are important when maintaining data about and communicating with individuals. You should configure names in your database for consistent use across your institution. To configure names, use name parts (first, middle, and last name) and name types to define a name type (for example, legal, maiden, primary, or preferred) and identify the order in which the name parts will be presented for that type.

Define name prefixes and suffixes to further identify and address individuals in your campus community. Standard prefixes (Mr, Mrs, and Miss) and suffixes (Esq, MD, PhD) are predefined. You can set up additional prefixes or suffixes.

PeopleSoft delivers name configurations preformatted and preparsed based on country. When you enter the country code on the Names page, the system provides name fields in the format set for that country.

The following table lists the name fields and the order in which they appear for each country. After you enter the name parts and save the record, the system displays the name, concatenated according to the specified format, in the Name field.

Country Name Format	Country Name Format
NLD (Netherlands)	*ESP (Spain)*
Name	Name
First Name	Prefix
Last Name	First Name
Royal Prefix	Last Name
Preferred First Name	Second Last Name

Country Name Format	Country Name Format
Initials	*DEU (Germany)*
Title	Name
BEL (Belgium)	Title
Name	First Name
First Name	Last Name
Last Name	Royal Prefix
Preferred First Name	Royal Suffix
Title	Prefix
CHE (Switzerland)	*JPN (Japan)*
Name	Name
First Name	Name Alternate Character
Last Name	*Other (USA and all others)*
Title	Name
ITA (Italy)	First Name
Name	Middle Name
First Name	Last Name
Last Name	Prefix
Title	Suffix

To create usages and define the name parts for each usage, define hierarchical orders by which to search for other name types in case the name type that you specify does not exist for an individual. For example, you might create a usage of *Admit* for sending an admissions letter to an applicant. You might want to search for and use the individual's preferred first name. If no data exists for that name type, you might want to then search for and use the individual's formal name, and so on. You can create general or specific usages and specify one or a hierarchy of many name types within each usage.

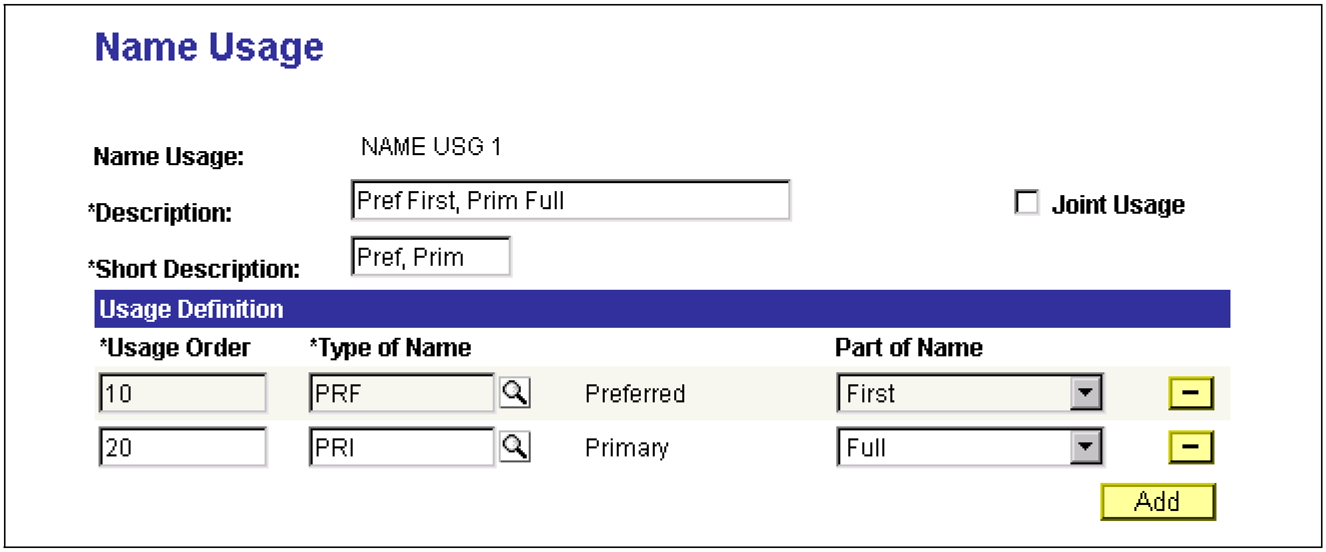
Arrange name types in the order that they should appear in an application. For example, when you print an admissions letter and envelope, the applicant's name appears first in the salutation of the letter and then on the envelope. If you select the *Admit* usage previously described, the preferred first name (first in the hierarchical order) appears first (Dear Dave), and the formal name next in the hierarchical order appears next (David Miller).

Pages Used to Set Up Name Formats and Usages

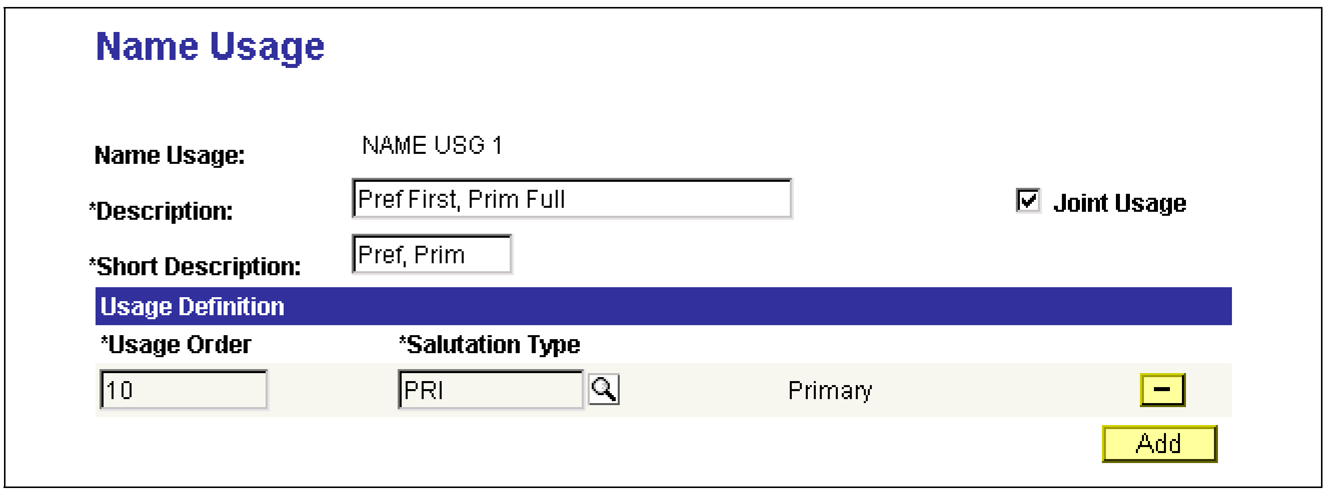
Page Name	Object Name	Navigation	Usage
Name Usage	NAME_USAGE_TABLE	Design Student Administration, Establish People Processing, Setup, Name Usage Table, Name Usage Table	Define name usages to specify the hierarchies of name types that you want to use in a specific usage.
Name Prefix Table	NAME_PREFIX_TABLE	• Design Student Administration, Establish People Processing, Setup, Name Prefix Table, Name Prefix Table • Administer Workforce, Administer Workforce (GBL), Setup, Name Prefix Table, Name Prefix Table • Administer Workforce, Administer Workforce (USF), Setup, Name Prefix Table, Name Prefix Table	Set up or review name prefixes.
Name Suffix Table	NAME_SUFFIX_TABLE	• Design Student Administration, Establish People Processing, Setup, Name Suffix Table, Name Suffix Table • Administer Workforce, Administer Workforce (GBL), Setup, Name Suffix Table, Name Suffix Table • Administer Workforce, Administer Workforce (USF), Setup, Name Suffix Table, Name Suffix Table	(Optional) Set up or review name suffixes for prompting pages with names data. Alternatively, you can manually include the suffix after the individual's last name on those pages.

Defining Name Usages

Access the Name Usage page.



Name Usage page (1 of 2) – without Joint Usage selected



Name Usage page (2 of 2) – with Joint Usage selected

Warning! The Name Usage Table is a fundamental table shared across all applications in PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions. Coordinate carefully with other departments to define and update the Name Usage table to ensure that these values meet the needs across your institution.

Joint Usage

To set up this name usage for joint communication, select this check box. To set up for general name usage, clear this check box.

Create joint usages if your institution uses the Joint Communication Management feature. The joint name usages are used to define what salutation type you want to use on a letter send jointly to two individuals when you use the letter generation process.

The elements that appear in the Usage Definition area of the page vary depending on whether you select the Joint Usage check box. If selected, the Salutation Type field becomes available.

Usage Definition

Order	The order in which the system searches for and uses the associated data. The system displays the sequential usage order each time that you add a new row. You can change the numbers to rearrange the usage order.
Name Type	Select the type of name for which the system should search.
Part of Name	Select the name part within the specified name type for which the system should search.
Usage Order	This field appears when you select the Joint Usage check box. Use it to indicate the order in which the system should search for and use the specified salutation type.
Salutation Type	Select the salutation type, from the salutation types defined on the Joint Communications page, for which you want the system to search.

See Also

Chapter 26, "Managing Communications," page 269

Setting Up Name Prefixes

Access the Name Prefix Table page.

Note. If your institution uses PeopleSoft HRMS, name prefixes might already exist in your system.

Name Prefix	Enter the title that you want to make available to precede an individual's name (for example, *Dr, Mr, Mrs, Miss,* and *Ms*). Do not include punctuation with the prefix.

(Optional) Setting Up Name Suffixes

Access the Name Suffix Table page.

Note. If your institution uses PeopleSoft HRMS, name suffixes might already exist in your system.

Name Suffix	Enter the degree, status, title, or generation indicator that you want to make available to follow an individual's name (for example, *Esq, MD, PhD,* and *Jr*). Do not include punctuation with the suffix.

Establishing Salutations

This section provides an overview of salutations and discusses how to:

- Create salutations.
- Define salutation types for joint communications.

Understanding Salutations

You can set up salutations and salutation types for use in generating communications. The salutation types that you define will be available for use on the Joint Communication Management page in the Relationship component. You can reduce joint communications data entry by setting fields within a salutation type to define how two names will appear in the address and the greeting of a joint communication.

For example, if you select the salutation type of *Primary* select the "Two separate lines" check box, and define and format the name type as *Primary.* Then, when you select the salutation of *Primary* on the Joint Communication Management page, the system places each of the two individual's (primary) names on separate lines.

Also use salutation setup to maintain consistent use of a salutation type, assuring that all users entering data for joint communications use the same rules to enter the names. For example, if you set up a salutation type of *Friend* and define it to use only the individuals' first names, users can use the *Friend* salutation type to consistently use the same, more personal greeting where appropriate, in joint communications.

Pages Used to Set Up Salutations

Page Name	Object Name	Navigation	Usage
Salutations	SALUTATION_TABLE	Design Student Administration, Establish People Processing, Setup, Salutation Table, Salutation Table	Create the salutations to make available in your system. The Joint Salutation Type Table page uses salutations created here.
Salutation Type for Joint Communications	SALU_TYPE_SETUP	Design Student Administration, Establish People Processing, Setup, Joint Salutation Type Table, Salutation Type	Define salutation types to make available for joint communications. The Joint Communication Management page (in the Relationships component) and the Name Usage page use the salutation types created here.

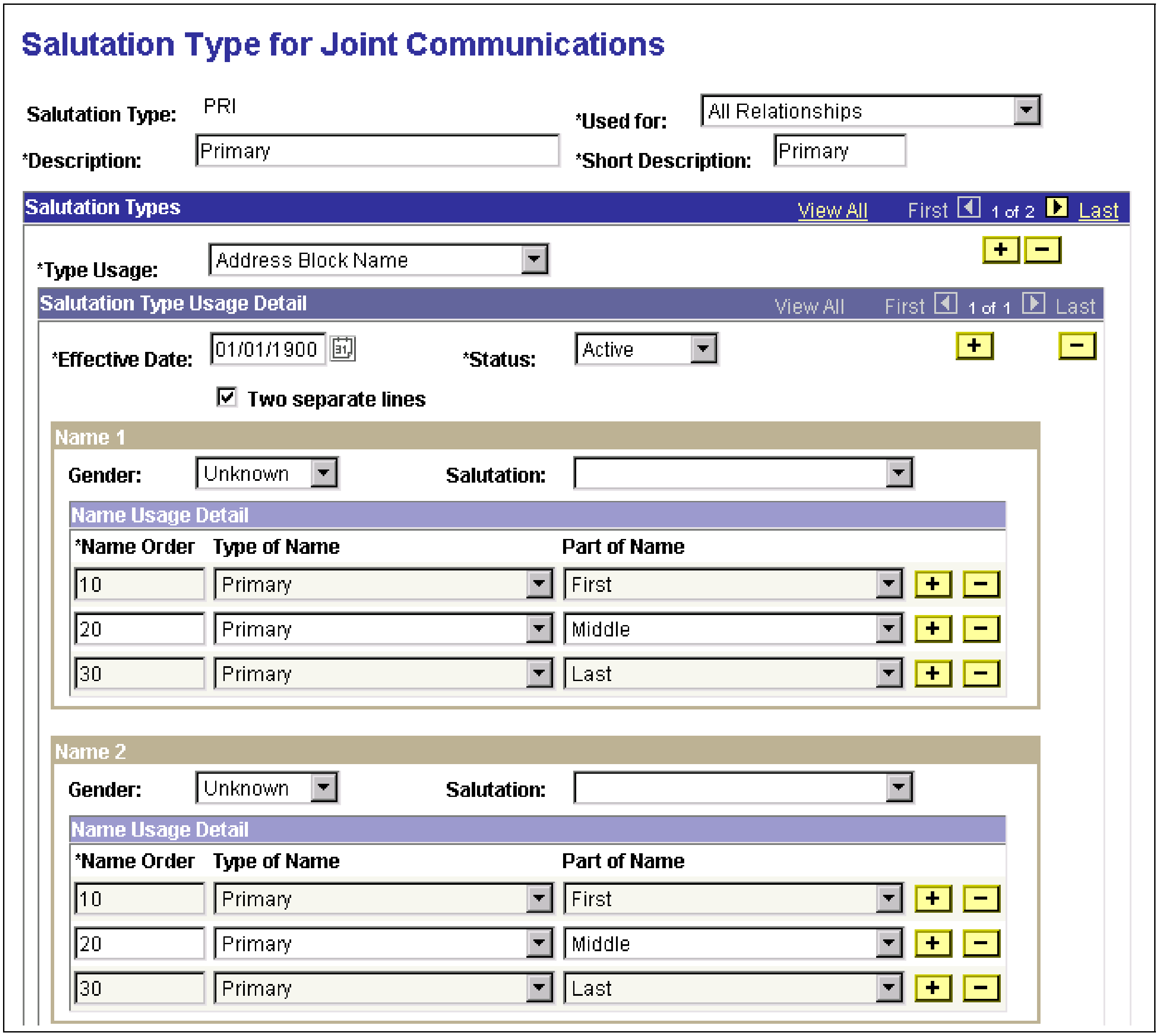
Creating Salutations

Access the Salutations page.

Salutation Enter the salutation that you want to create. Do not include punctuation in the salutation.

Defining Salutation Types for Joint Communications

Access the Salutation Type for Joint Communications page.



Salutation Type for Joint Communications page

Used For

Select the relationship *(All Relationships* or *Spouse Only)* for which this salutation should be available on the Joint Communication Management page. For example, if you specify *All Relationships* this salutation will be available for all. If you are setting up a joint salutation format that will create something like *Mr. and Mrs. Smith,* select *Spouse Only* to make this salutation a valid choice only when there is a spousal relationship.

Salutation Types

Type Usage

Select the area of the joint communication where this salutation type should be used. For each salutation type that you create, set up one *Address Block Name* usage and one *Salutation* usage.

Address Block Name: The salutation that appears in the address area of the joint communication.

Salutation: The salutation that appears in the greeting of the joint communication.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Salutation Type Usage Detail

Two separate lines Select to indicate that each of the two names should print on a separate line for this salutation. For example:

John Smith

Mary Fletcher

Name 1 (and) Name 2

Use fields in the Name 1 and Name 2 areas to configure each name for this joint communication salutation type.

Warning! Select gender and salutation carefully for each name. If you select a salutation directed to a specific gender and neither individual in the relationship is that gender, you could inadvertently offend the recipients. For example, if you select the gender of *Female* and the salutation of *Dear Ms.* but neither individual in the relationship is female, you could end up with *Dear Ms. Robert Smith and David Jones.* Using the Salutation Type for Joint Communications page reduces data entry only. Users should always validate that the names are correct and that the salutations reflect the appropriate genders.

Gender Use to specify the order in which the recipient names should appear in this salutation. If no gender is specified, the system places the primary ID name first and the related ID name next.

Female: The system places the female name first in the salutation.

Male: The system places the male name first.

Unknown: The system places the names in the order in which they are listed in the Relationships component and based on the gender specified for the individual on the Bio/Demo Data page.

Salutation Select the salutation opening (for example, *Dear Mr., Dear Ms.,* or *Mr. and Mrs*) that should precede this Name 1 or Name 2 individual's name.

For example, if you select *Dear Mr.* for Name 1 and *Dear Mrs.* for Name 2, and you selected the two separate lines check box, the salutation would look like this:

Dear Mr. John Smith

Dear Mrs. Mary Fletcher

Name Usage Detail

Name Order	The order in which the system searches for and uses the associated data. The system assigns the next sequential usage order each time that you add a new row. You can change the numbers to rearrange the usage order.
Type of Name	Select the type of name for which the system should search.
Part of Name	Select the name part within the specified name type for which the system should search.

Establishing Address Usages

This section provides an overview of address usages and discusses how to define or review address usages.

Understanding Address Usages

Addresses are as fundamental as names to tracking people in your database. It is important to be able to maintain multiple addresses and phone numbers for an individual, including electronic addresses and campus locations.

Define sets of address types that you routinely want to search for and use for a specific business purpose. For example, if you're sending an admissions letter, you might want to use the individual's home address for the correspondence. If no data exists for the home address type, you might want to search for and use the individual's mailing address. If no data exists for the mailing address, you might want to search for and use the individual's permanent address type, and so on.

You can enter specific campus addresses and physical locations (headquarters, satellite campuses, and remote recruiting offices) to indicate where to contact students or staff at your institution or to specify locations where classes and other events are held.

See Also

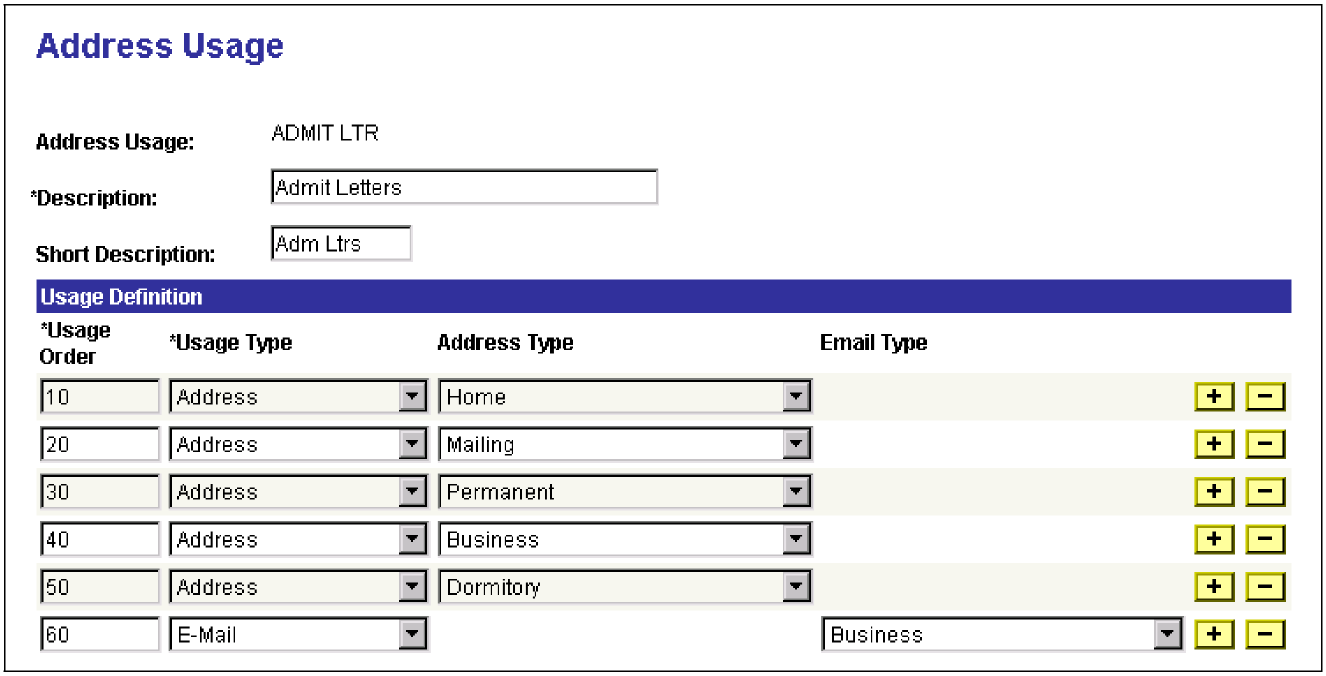
Chapter 20, "Maintaining Bio/Demographic Data," page 169

Page Used to Establish Address Usages

Page Name	Object Name	Navigation	Usage
Address Usage	ADDR_USAGE_TABLE	Design Student Administration, Establish People Processing, Setup, Address Usage Table, Address Usage Table	Define or review address usages by specifying hierarchies of address types to search for and use in a specific usage.

Defining or Reviewing Address Usages

Access the Address Usage page.



Address Usage page

Warning! The Address Usage Table is a fundamental table shared across all applications in PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions. Coordinate with other departments to define and update the Address Usage table to ensure that these values meet the needs across your institution.

Usage Order

The order in which the system searches for and uses the associated data. The system displays the sequential usage order each time that you add a new row. You can change the numbers to rearrange the usage order.

Usage Type

Determine how the address type to search for is used. Usage types include *Address* and *Email.*

Values for this field are delivered with your system as translate values. Except for *Home* and *Mail,* you can modify these translate values.

Note. When the Usage Type is *Email,* the system extracts the specified email address, but it does not produce or send an email communication.

Address Type

Appears when the specified usage type is *Address.* Select the type of address (for example, *Billing, Home,* or *Mailing*) for which the system should search.

Values for this field are delivered with your system as translate values. Except for *Home* and *Mail,* you can modify these translate values.

Email Type

Select the type of email address (for example, *Home, Business,* or *Campus*) for which you want the system to search.

Values for this field are delivered with your system as translate values. Except for *Home* and *Mail,* you can modify these translate values.

Establishing Phone Usages

This section provides an overview of phone usages, and discusses how to define or review phone usage values.

Understanding Phone Usage Values

If your system's installation country is *CAN,* phone usage values are used for ESIS 'Current' phone reporting.

Here's how to create an address usage for ESIS 'Current' address reporting:

1. Access the Phone Usage page.
2. Add an Address Usage of *RPT_PHONE.*
3. In the Description field, enter *Phone Priority for Cdn Rpts.*
4. In the Short Description field, enter *Cdn Reports.*
5. Using the Usage Ordr and Phone Type fields, insert rows for all of your phone usage types.

Page Used to Establish Phone Usage Values

Page Name	Object Name	Navigation	Usage
Phone Usage	PHONE_USAGE_TABLE	Design Student Administration, Establish People Processing, Setup, Phone Usage Table, Phone Usage	(CAN) Define Canadian reporting phone usage values for ESIS (Extended Student Information System) reporting.

Defining Phone Usage Values

Access the Phone Usage page.

Usage Order The order in which the system searches for and uses the associated data. The system displays the sequential usage order each time that you add a new row. You can change the numbers to rearrange the usage order.

Phone Type Select the phone type (for example, *Dormitory, Home,* or *Mailing*) for which the system should search.

Values for this field are delivered with your system as translate values. Except for *Home* and *Mailing,* you can modify these translate values.

Establishing Campus Locations

This section discusses how to define campus addresses for your institution.

Page Used to Define Campus Locations

Page Name	Object Name	Navigation	Usage
Location Addresses	LOC_ADDR_TABLE	Design Student Administration, Establish People Processing, Setup, Location Address Table, Location Address Table	Define or review campus addresses for your institution.

Defining Campus Addresses

Access the Location Addresses page.

Note. Be careful not to confuse this page with the Job Locations – Location Address page, where you set up job locations at your institution.

Enter the address information for this campus location.

Establishing National ID Numbers

This section provides an overview of national identification numbers and discusses how to establish a national ID number.

Understanding National ID Numbers

Each country uses some form of a national identification number for payroll, identification, or benefits purposes. For example, United States individuals have Social Security numbers (SSN), while Canadian individuals have Social Insurance numbers (SIN). Use national ID numbers to identify individuals in your system and to issue or accept payments from them.

Different national IDs have unique formatting requirements. Formatting is stored on the National ID Type table, which is currently delivered with the proper national ID formats for Belgium, Canada, Germany, France, United Kingdom, Japan, Netherlands, and the United States. Review the existing national ID information or add formatting for other countries if necessary.

The system refers to the information on the National ID Type table and to UDF formatting information defined in PeopleSoft Application Designer to verify and format national IDs. When you select a country code on any page where you enter a National ID, the system refers to the information for the specified country on the National ID Type Table page. It also dynamically displays the proper ID label, sets the National ID type, and refers to the ID format information to supply a default ID if the real one is unavailable. The default national ID uses the generic placeholders (either 9's for numerals or A's for letters). For example, if you enter *USA* for the country, but do not enter the individual's Social Security number, the system displays the value of 999-99-9999 in the NID field.

The National ID Type Table page is delivered set up to ensure that you are tracking the proper National ID type for Belgium, Canada, France, Germany, Italy, Japan, the Netherlands, Spain, Switzerland, the United Kingdom, and the United States. You can also use it to add new countries to the table or modify existing country ID information.

Note. If you need to set up a national ID for a country that does not already exist in your system, you must add the country first on the Country Description page and then set up the national ID on the National ID Type Table page.

See Also

PeopleTools, Creating Field Definitions

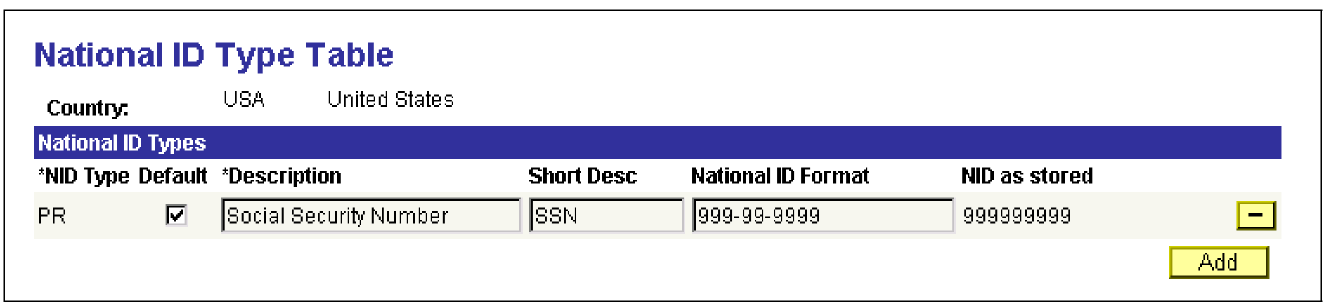
Chapter 20, "Maintaining Bio/Demographic Data," page 169

Page Used to Establish National ID Numbers

Page Name	Object Name	Navigation	Usage
National ID Type Table	NID_TYPE_TABLE	• Design Student Administration, Establish People Processing, Setup, National ID Type Table, National ID Type Table • Define Business Rules, Manage Human Resources (GBL), Setup, National ID Type Table, National ID Type Table • Define Business Rules, Manage Human Resources (USF), Setup, National ID Type Table, National ID Type Table	Define or review default National ID values for a country.

Establishing National ID Types

Access the National ID Type Table page.



National ID Type Table page

Note. If your institution uses PeopleSoft HRMS, the additional national IDs that your institution requires might already exist. If your institution licenses and installs PeopleSoft HRMS, PeopleSoft Student Administration Solutions, and PeopleSoft Contributor Relations Solutions, note that modifying values on the National ID Type table in one system automatically changes the values in the others. For example, if you select Manage Human Resources (GBL), Setup, National ID Type Table, and modify the values there, the values in your PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions systems are automatically modified the same as if you had selected Design Student Administration, Establish People Processing, Setup, National ID Type Table.

NID Type (national ID type) The system displays the national ID type of this country.

This field controls the default National ID type when you select a National ID Country on the system pages in PeopleSoft Student Administration/Contributor Relations Solutions where you enter National ID information.

Note. Special PeopleCode logic performs a check-digit validation on Canadian NIDs and an 11-check validity check on Dutch NIDs.

Verifying SINs for Canadian individuals: You can invoke a modulus 10-check digit formula to verify a Canadian individual's SIN. The formula follows federal standards for using the ninth digit in an individual SIN to verify the number. If you enter an individual SIN that doesn't match the check digit that the formula calculates, the system issues an error message telling you to enter the correct nine-digit number. Select or clear the option for the modulus 10-digit formula in the SIN field format definition in PeopleSoft Application Designer.

Verifying the Social Security ID for Dutch individuals: The Dutch NID is commonly referred to as the SoFi (Social/Fiscal) number. You can invoke the 11-check digit formula to verify a Dutch individual's SoFi number. The 11-check digit formula is a complex mathematical formula that evaluates your entry for the individual's Social Security ID and verifies that the result of the calculation is 11, to determine whether the national insurance/social security ID has a valid format.

Default Select to indicate that this is the format to use when this country is selected but the individual's NID is not available.

National ID Format Enter the standard NID format for this country, using *9* as a placeholder for a numeral and *A* as a placeholder for a letter.

For example, United States SSNs comprise nine numeric digits in a specific format. For the United States, enter *999-99-9999*. Another country's NID might be a mixture of alpha and numeric characters in a different format, perhaps*AA-99A99-9*.

NID as Stored Shows how the NID is actually stored in the system.

Establishing ID Delete Control

You can establish priority data to control and prevent the deletion of individual records in your system.

See Chapter 18, "Managing IDs," Deleting IDs, page 152.

Establishing Search/Match Criteria

You can establish criteria and search orders to detect and identify duplicate records in your system.

See Chapter 19, “Searching for Records,” page 159.

Establishing FERPA Control

You can specify the data that your institution must control to comply with FERPA and with any additional internal privacy policies that your institution might have.

See Chapter 21, “Managing FERPA,” page 221.

CHAPTER 3

Setting Up ID Delete Control

This chapter provides an overview of setting up ID delete control and discusses how to:

- Define priority data to control the deletion of individual IDs.
- Define priority data to control the deletion of organization IDs.

Understanding ID Delete Control

The ID delete control feature enables you to define priority data records to prevent users from deleting IDs with data on which others at your institution might rely. With priority data in place, the system will not permit users to delete an ID for which that data exists. A system administrator, or other user with proper security, can review the key data and then, if required, delete the ID.

PeopleSoft delivers predefined ID delete control priority tables and fields for individual and organization IDs. Corresponding messages are preset to appear when you try to delete an ID with data in any of the associated control records and fields.

Note. You should *not* modify the predefined ID delete controls. You can, however, define additional priority data by adding other records and fields to control the deletion of IDs.

Common Elements Used in This Chapter

Record (Table) Name — Displays the name of the record that contains the priority data field.

Field Name — Displays the name of the field that, when data exists in it, prevents the deletion of the ID.

Message Set Number — Enter the set number of the message to display when data exists in the priority data field.

Message Number — Enter the number of the message to display when data exists in the priority data field.

Warning! If you need to create user-configurable messages, create them in Message Sets 20,000-29,000 to prevent the system from overwriting them.

Note. The short description for many message numbers is the same. Review the detailed description associated which each message number in the PeopleTools Message Catalog to determine which message number displays the desired message regarding the specific field.

Controlling the Deletion of Individual IDs

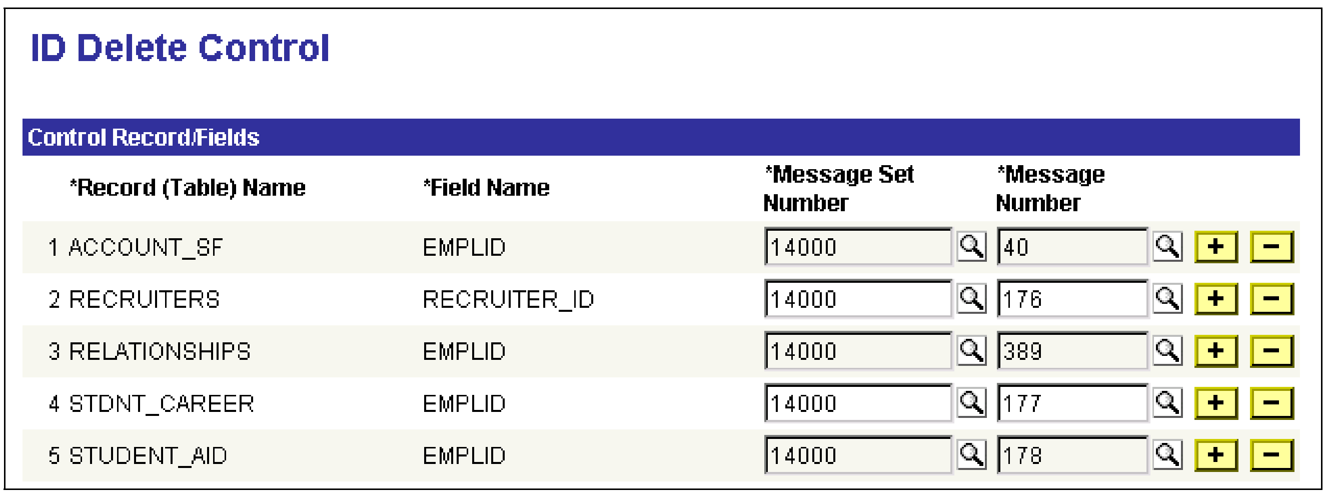
This section discusses how to define priority data to control the deletion of individuals IDs.

Page Used to Set Up ID Delete Control

Page Name	Object Name	Navigation	Usage
ID Delete Control	ID_DEL_PRVNT_TABLE	Design Student Administration, Establish People Processing, Setup, ID Delete Control, ID Delete Control	Define priority data to control the deletion of individual IDs from your database.

Defining Priority Data

Access the ID Delete Control Page.



ID Delete Control page

The ID on each of the following control records and the associated messages are delivered predefined as priority data.

- ACOUNT_SF
- RECRUITERS
- RELATIONSHIPS
- STDNT_CAREER
- STUDENT_AID

You can delete any of the rows of predefined control records. However, you should keep these as your base ID delete control records for individual IDs and define additional priority data as necessary.

To define an additional control record, or to add an additional field from the same record, click the plus button at the level where you want to add it. The system enters a new row and renumbers the sequence of control records. Select the record name, field name, and message data. The new row is not added until you click Save.

Controlling the Deletion of Organization IDs

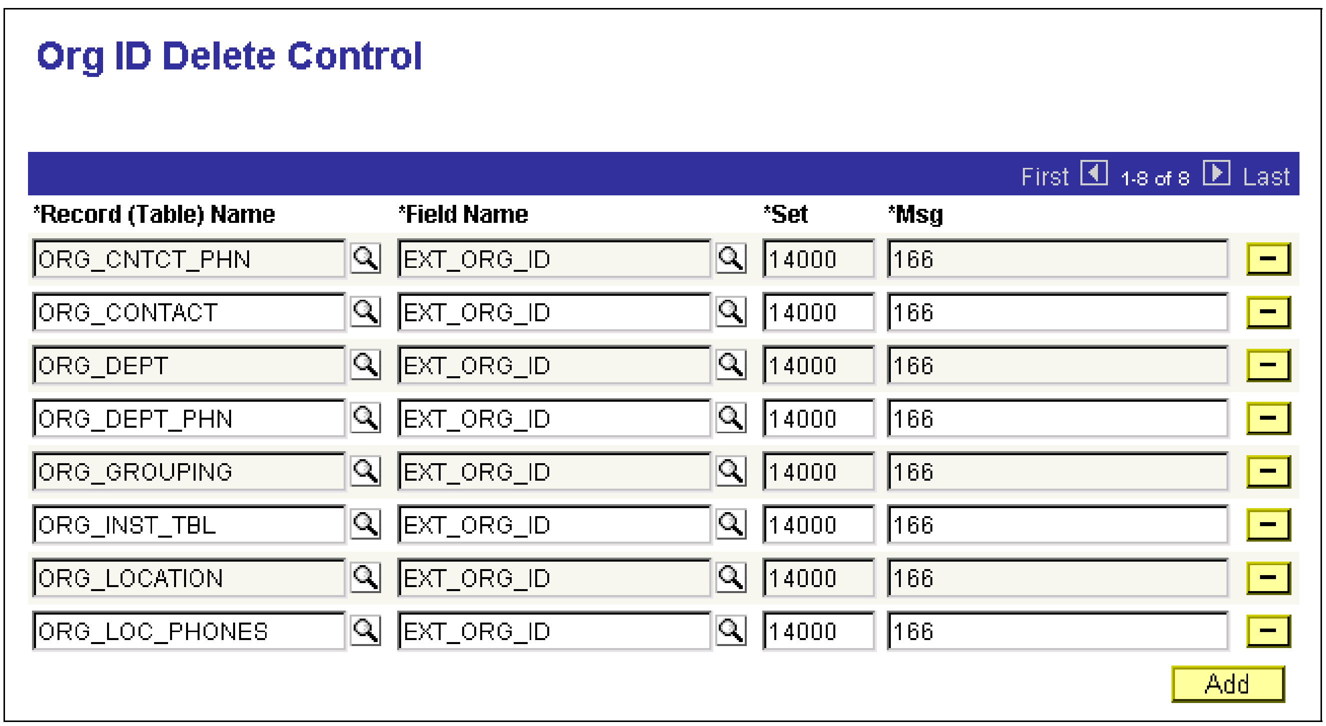
This section discusses how to define priority data to control the deletion of organization IDs.

Page Used to Control the Deletion of Organization IDs

Page Name	Object Name	Navigation	Usage
Organization Delete Control	ORG_DEL_PRVN_TABLE	Build Community, Organization Data, Setup, Organization Delete Control, Org ID Delete Control	Define priority data to control the deletion of organization IDs in your database.

Defining Priority Data

Access the Organization Delete Control page


Org ID Delete Control

First 1-8 of 8 Last

*Record (Table) Name	*Field Name	*Set	*Msg
ORG_CNTCT_PHN	EXT_ORG_ID	14000	166
ORG_CONTACT	EXT_ORG_ID	14000	166
ORG_DEPT	EXT_ORG_ID	14000	166
ORG_DEPT_PHN	EXT_ORG_ID	14000	166
ORG_GROUPING	EXT_ORG_ID	14000	166
ORG_INST_TBL	EXT_ORG_ID	14000	166
ORG_LOCATION	EXT_ORG_ID	14000	166
ORG_LOC_PHONES	EXT_ORG_ID	14000	166

Add

Organization ID Delete Control page

The ID field on each of the following control records and the associated messages are delivered predefined as priority data.

- ORG_CNTCT_PHN
- ORG_CONTACT
- ORG_DEPT
- ORG_GROUPING
- ORG_INST_TBL
- ORG_LOCATION
- ORG_LOC_PHONES

You can delete any of the rows of predefined control records. However, you should keep these as your base ID delete control records for organization IDs and define additional priority data as necessary.

To define additional priority data rows, click Add. The system adds a new row at the bottom of the page. Select the record name, field name, and message data. The new row is not added until you click Save.

CHAPTER 4

Setting Up Search/Match Criteria

This chapter provides an overview of setting up Search/Match criteria and discusses how to define Search/Match criteria.

Understanding Search/Match

To use the full functionality of your system you must maintain the integrity of your database. With users from many departments entering data into your system, you will want to take measures to minimize the entry of duplicate or multiple records. The Search/Match feature enables you to define criteria for checking for duplicate or multiple entries of individuals. Consider requiring users to use Search/Match to determine if a record already exists for an individual before adding one.

You can define a number of search levels to determine if duplicate or multiple entries exist. The search levels are successively less and less restrictive, with the lowest (or first) search level the most restrictive and the highest (or last) search level the least restrictive. The system continues the search until it either encounters a potential duplicate or executes all search conditions and finds no potential duplicate. A search condition is bypassed if one or more of the search fields does not contain any data.

Five search levels (search orders 10, 20, 30, 40, and 50) are predefined. You can use these as they are, modify their search data, rearrange their sequence, or add search orders.

Warning! Adding a field to a search order may require significant programming. If the field does not already exist on the DERIVED_PERDATA record, you must add it there and to all possible affected pages for online add search/match to invoke the search order. You must also add the field to the SQR and Cobol background programs that use search/match to set values for that field. When modifying background programs, remember that in a background program, each field name in a search order requires a bind variable ($bind#). SQR is limited to a maximum of 40 bind variables per search order and a maximum of 30 search orders. Cobol programs do not have these limitations.

To define a search level, specify an order number to indicate where in the sequence of searches the search should be performed. Then, identify the records and fields containing the information for the system to search for and check. The system displays the total number of characters in each selected field. You can use this information to configure the search to compare against the entire field or any number of characters in the field. For example, the Address 1 field might be 35 characters in total. Search order 10 when shipped, is set to look at only at characters 1 through 5 of the Address 1 field, but it is set to look at the entire fields for birthdate, sex, and national ID.

You can also configure the search to accept blank data or accept only a strict match of the criteria. For example, if you set the Birthdate field to accept a blank match, when the system encounters a record that contains data matching other criteria in the search but no birthdate, it will include the record in the results. Conversely, if you set birthdate to strict match only, when the system encounters a record that contains a birthdate value, it will include the record in the results only if the birthdate matches the criteria exactly, whether or not other data match criteria in the defined search.

Note. The system also uses the Search/Match criteria in the search that launches when you add an individual to your database and when you run a third-party data load process. For automatic searches, the system goes through all search orders, performing a search only when data exists for each field listed in the search criteria. A blank value causes the system to move to the next search order. When you run the search manually, as described in this section, you can assign the search orders that the system should use and dictate the types of field values (blank or strict match) that should force the search to the next search order.

After you set up Search/Match order-level criteria, you can conduct searches based on those criteria.

See Also

Chapter 19, "Searching for Records," Using Search/Match, page 161

Defining Search/Match Criteria

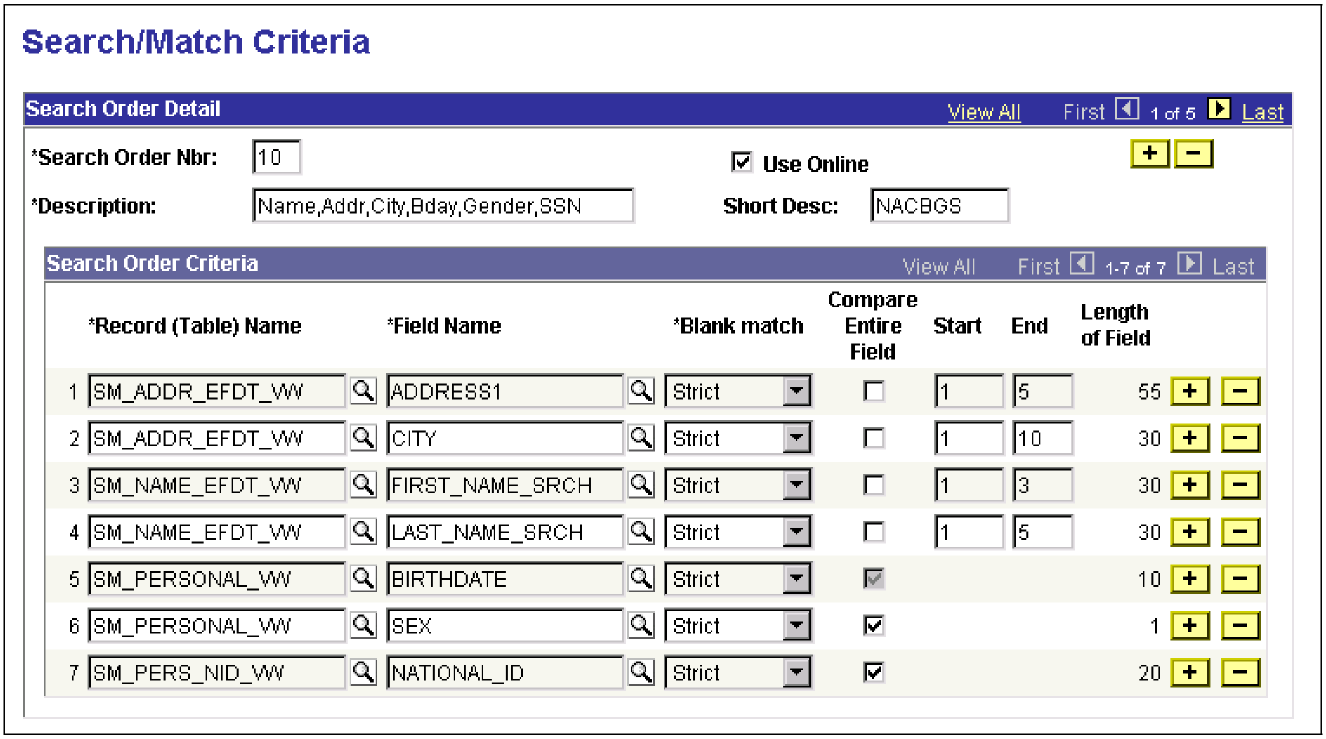
This section discusses how to specify criteria and assign search orders.

Page Used Set Up Search/Match Criteria

Page Name	Object Name	Navigation	Usage
Search/Match Criteria	SEARCH_TABLE	Design Student Administration, Establish People Processing, Setup, Search/Match Criteria, Search/Match Criteria	Specify sets of criteria and arrange them in order for searching for duplicate or multiple records.

Specifying Criteria and Assigning Search Orders

Access the Search/Match Criteria page.



Search/Match Criteria Page

Search Order Number — Each search order number represents a search condition made up of one or more search fields.

Use Online — Select to make the Selective Search Order by Number option available on the Search/Match page for manual searches.

Record (Table) Name — Indicates a record that contains the search data:

SM_EFDT_ADDR_VW: Current address data.

SM_EFDT_NAME_VW: Current name data.

SM_HIST_ADDR_VW: Historical address data.

SM_HIST_NAME_VW: Historical name data.

SM_PERS_NID_VW: National ID data.

SM_PERSONAL_VW: Personal data.

Field Name — Indicates the name of the field that contains the search data.

Note. When you include national IDs in the criteria, the system will search on all national IDs in the system for that individual

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Blank match — Select to control the level of match for the search to accept.

Strict: Accept only an exact match of the specified data.

Blank Match OK: Accepting blank or nonexistent data for this field is OK.

Compare Entire Field Select to indicate that the search should compare against the entire field.

If you do not select this, you must enter values in theStart and End columns to indicate which range of characters in the field should be used for the comparison.

Note. If you are comparing a date or numeric field, the Compare Entire Field is not available as the comparison must be against the entire field.

Start Specify the first character with which the system should begin the range of comparison.

End Specify the last character with which the system should end the range of comparison.

Length of Field Indicates the number of characters in the field. When you exit the Field Name field, the system displays the total number of characters in that field for you.

CHAPTER 5

Setting Up Bio/Demographic Data

This chapter discusses how to:

- Set up ethnic groups.
- Set up languages.
- Set up individual relationships.
- Set up relations with the institution.
- Set up religious preferences.
- Set up work experience classifications.

See Also

Chapter 2, "Designing PeopleSoft Campus Community," page 5

Setting Up Ethnic Groups

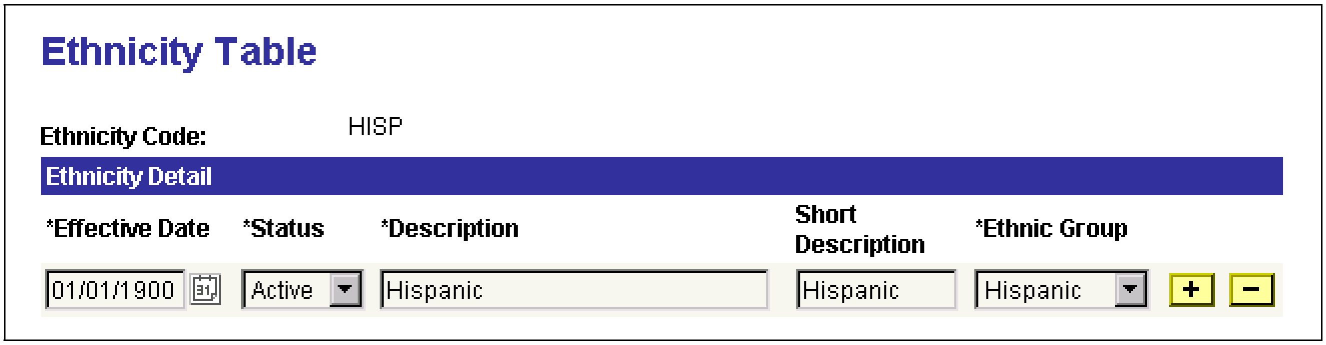
This section discusses how to define codes for ethnic groups.

Page Used to Set Up Ethnic Groups

Page Name	Object Name	Navigation	Usage
Ethnicity Table	ETHNICITY_TABLE	Design Student Administration, Define Campus Community, Setup, Ethnicity Table, Ethnicity Table	Define codes for ethnic groups.

Defining Ethnic Group Codes

Access the Ethnicity Table page.



Ethnicity Table page

Ethnic Group

Select the U.S. government ethnic group *(American Indian, Asian, Black, Hispanic,* or *White)* that best describes this ethnicity code.

You can create as many ethnicity codes as desired. However, values for this field are delivered with your system as translate values. These translate values are the ethnic groups recognized by the U.S. Federal Government. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Setting Up Languages

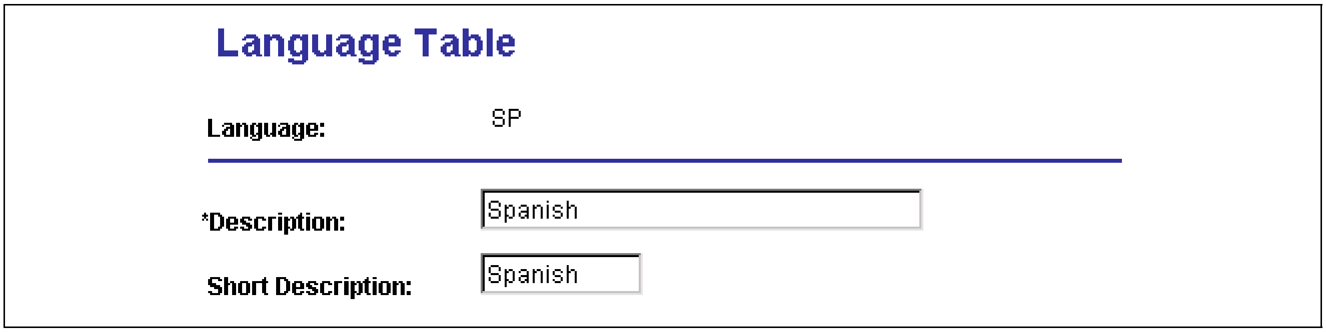
This section discusses how to define codes for languages.

Page Used to Set Up Languages

Page Name	Object Name	Navigation	Usage
Language Table	LANGUAGE_TABLE	• Design Student Administration, Define Campus Community, Setup, Language Table, Language Table • Develop Workforce, Manage Competencies (GBL), Setup, Language Table, Language Table	Define language codes.

Defining Language Codes

Access the Language Table page.



Language Table page

Setting Up Individual Relationships

This section discusses how to:

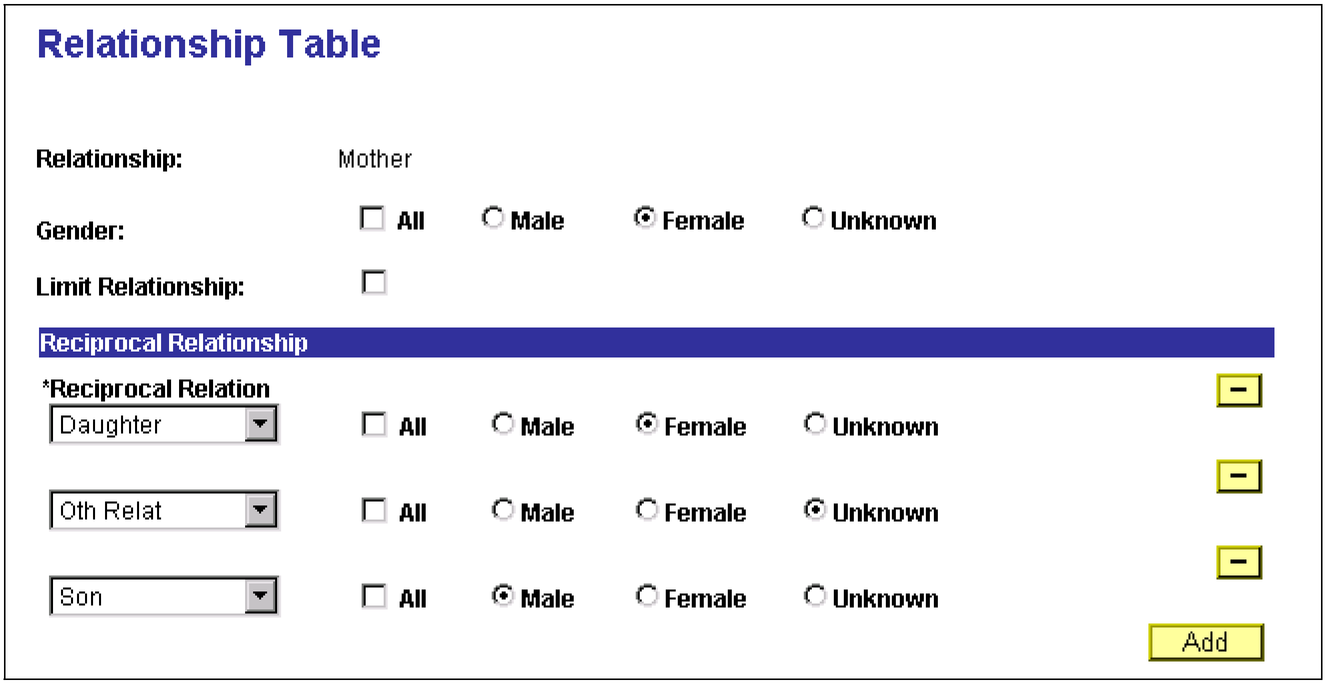
- Define reciprocal relationships.
- Enable marital status verification.

Pages Used to Set Up Individual Relationships

Page Name	Object Name	Navigation	Usage
Relationships	RELATIONSHIP_TABLE	Design Student Administration, Define Campus Community, Setup, Relationship Table, Relationship Table	Define reciprocal individual relationships.
Relationship/Marital Status	MAR_STATUS_TABLE	Design Student Administration, Define Campus Community, Setup, Relationship / Marital Status, Relationship / Marital Status	Enable marital status so the system can verify the status when you create relationships between two individuals and warn you when data is inconsistent.

Defining Reciprocal Relationships

Access the Relationship Table page.



Relationship Table page

Relationship

Indicates the relationship (for example, *Mother, Father,* or *Employer*) to modify or review.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Gender

Select the gender *(All, Male, Female,* or *Unknown)* associated with this relationship.

For example, the associated gender for the relationship of *Mother* is usually *Female.* For the relationship of *Spouse,* the gender could be either male or female, so you would select *All.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Limit Relationship

Select to indicate that individuals can have only one of these relationships in your system at a time.

For example, if you are defining the relationship of *Mother* and you select the *Limit Relationship* option, the system does not permit an individual to have more than one mother. If you are defining the relationship of *Spouse,* you probably want to select the *Limit Relationship* option to prevent an individual from having more than one spouse at a time.

Reciprocal Relationship

If the Create Reciprocal Relationship check box is selected on the Installation Defaults -- Campus Community page, you must specify the reciprocal relationships and their associated genders here.

Reciprocal Relation

Identify the reciprocal relation associated with the relationship that you are defining. Each relationship can have up to three reciprocal relationships.

For example, the reciprocal relationships associated with *Mother* are *Daughter* and *Son,* and for *StepMother, StepDaughter,* and *StepSon.* You might also include *Oth Relat (Other Related)* to cover those whose gender is specified as *Unknown* on the Bio/Demo Data page.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Gender

Specify the gender *(All, Male, Female,* or *Unknown)* that is associated with the reciprocal relationship specified.

For example, for *Daughter,* the associated gender is *Female.* For *Son,* it is *Male.*

Enabling Marital Status Verification

Access the Relationship/Marital Status page.

Relationship/Marital Status page

Marital Status

Select the marital status to verify—usually *Married.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Relationship

Select the relationship type to verify in association with the specified marital status—typically the status of *Married* and the relationship of *Spouse.*

Setting Up Relations to the Institution

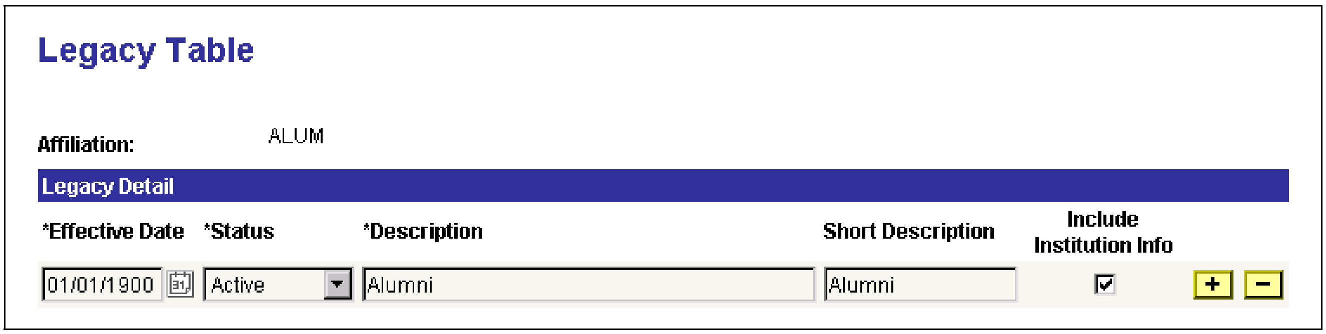
This section discusses how to define or review legacy affiliation types.

Pages Used to Set Up Relations to the Institution

Page Name	Object Name	Navigation	Usage
Legacy Table	INST_AFFIL_TABLE	Design Student Administration, Define Campus Community, Setup, Legacy Table, Legacy Table	Define the types of legacy affiliations that individuals can have with your institution.

Defining Legacy Affiliation Types

Access the Legacy Table page.



Legacy Table page

Include Institution Information

Select to indicate that the academic information relevant to the specified legacy relationship is to be included when this affiliation is selected for the related individual on the Legacy Information page in the Relationship component.

For example, if you want to know the institution that a related individual with this affiliation attended, and the academic program in which he or she was enrolled, select the *Include Institution Info* check box to ensure that the institution and academic program fields will be available on the Legacy Information page.

Setting Up Religious Preferences

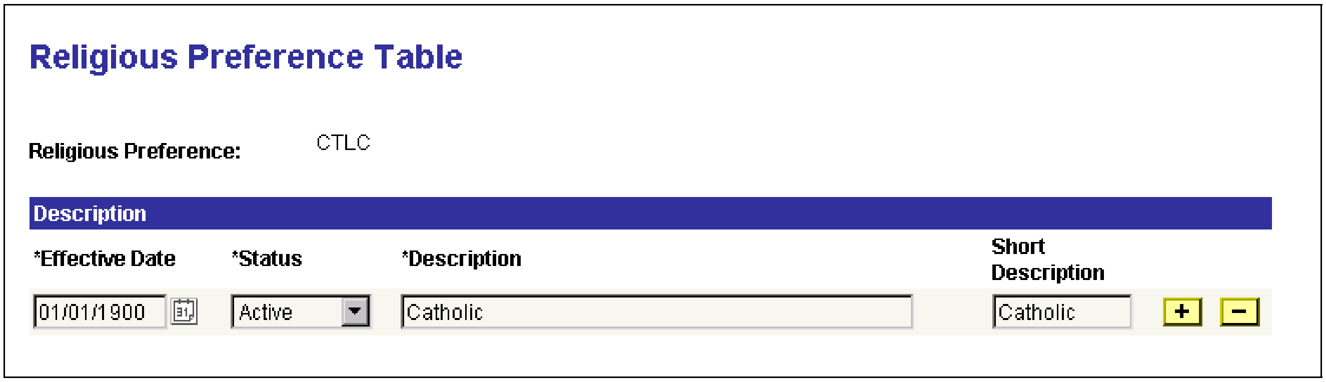
This section discusses how to define religious preference codes.

Page Used to Set Up Religious Preferences

Page Name	Object Name	Navigation	Usage
Religious Preferences Table	REL_PREF_TABLE	Design Student Administration, Define Campus Community, Setup, Religious Preference Table, Religious Preference Table	Define religious preference codes.

Defining Religious Preference Codes

Access the Religious Preference Table page.



Religious Preference Table page

Setting Up Work Experience Classification Codes

This section discusses how to:

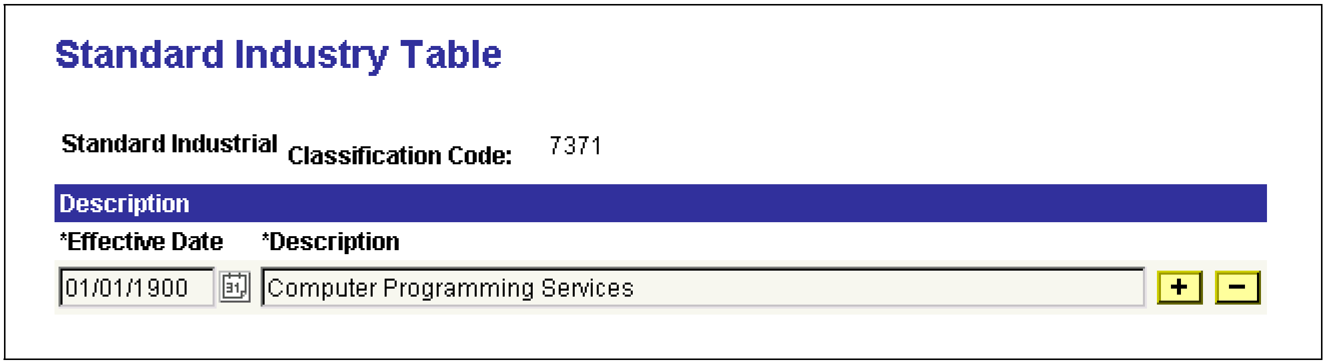
- Add or review Standard Industry Classification (SIC) codes.
- Add or review Standard Occupation Classification (SOC) codes.

Pages Used to Set Up Work Experience Classification Codes

Page Name	Object Name	Navigation	Usage
Standard Industry Table	US_SIC_TABLE	Design Student Administration, Define Campus Community, Setup, Standard Industry Table, Standard Industry Table	Add or review valid Standard Industry Classification (SIC) codes.
Standard Occupation Table	US_SOC_TABLE	• Design Student Administration, Define Campus Community, Setup, Standard Occupation Table, Standard Occupation Table • Define Business Rules, Define Payroll Taxes, Setup, U.S. SOC Table, U.S. SOC Table • Define Business Rules, Define Payroll Taxes (USF), Setup, U.S. SOC Table, U.S. SOC Table	Add or review the valid Standard Occupation Classification (SOC) codes.

Adding or Reviewing Standard Industry Classification (SIC) Codes

Access the Standard Industry Table page.



Standard Industry Table page

PeopleSoft ships your system with SIC codes loaded onto the table. Your institution is responsible for making sure the codes are current and that they reflect any changes made by the U.S. Department of Labor.

Note. If you implemented PeopleSoft HRMS, the SIC codes required by your institution might already exist in your system.

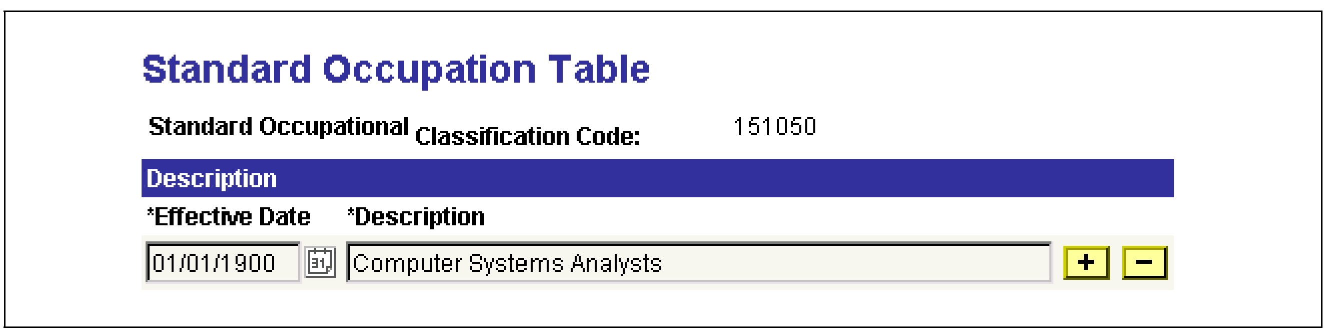
See Also

U.S. Department of Labor (which publishes the SIC codes list)

PeopleSoft Human Resources Management System PeopleBooks

Adding Standard Occupation Classification (SOC) Codes

Access the Standard Occupation Table page.



Standard Occupation Table page

PeopleSoft ships your system with SOC codes loaded onto the table. Your institution is responsible for making sure the codes are current and that they reflect any changes made by the U.S. Department of Labor.

Note. If you implemented PeopleSoft HRMS, the SOC codes required by your institution might already exist in your system.

See Also

U.S. Department of Labor (which publishes the SOC codes list)

PeopleSoft Human Resources Management System PeopleBooks

CHAPTER 6

Setting Up Service Indicators

This section provides an overview of setting up service indicators and discusses how to:

- Set up service impacts.
- Set up service indicators.
- Set up service indicator reasons.

See Also

Chapter 22, "Managing Service Indicators," page 231

Understanding Service Indicator Setup

Service indicators consist of service impacts and service indicator reasons that make each service indicator unique.

Here's how to set up service indicators:

1. Define service impact values on the Service Table page.
2. Define service indicator codes on the Service Indicator Codes page. (This includes attaching service impact values to each service indicator.)
3. Define service indicator reason codes for each service indicator on the Service Indicator Reasons page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Tracking Student Data," Using PeopleSoft Student Records Service Impacts

Setting Up Service Impacts

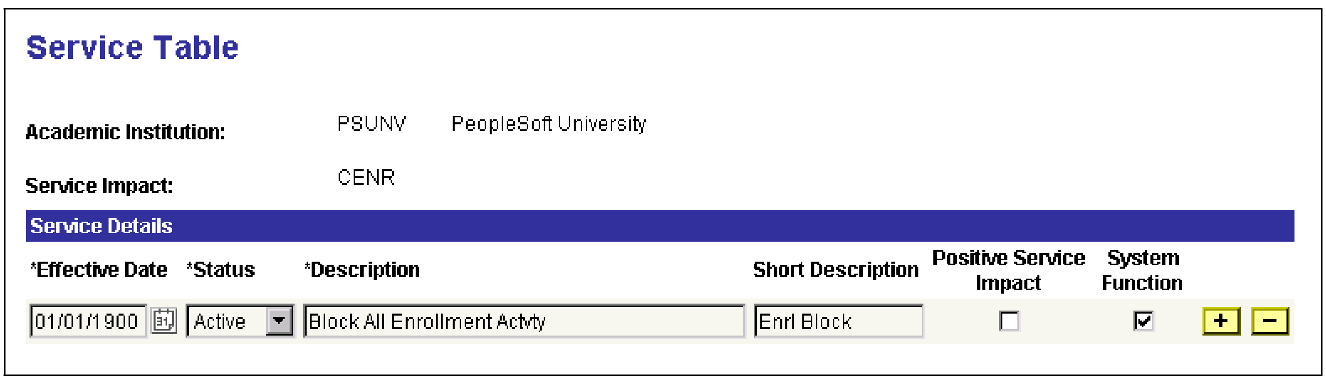
This section discusses how to define service impact codes.

Page Used to Set Up Service Impacts

Page Name	Object Name	Navigation	Usage
Service Table	SRVC_IMPACT_TABLE	• Design Student Administration, Define Student Administration, Setup, Service Table, Service Table • Manage Student Records, Manage Academic Records, Setup, Service Table, Service Table • Manage Student Records, Track Student Careers, Setup, Service Table, Service Table	Define service impacts codes to attach to service indicators.

Defining Service Impact Codes

Access the Service Table page.



Service Table page

To use the PeopleSoft delivered service impact related services (such as blocking enrollment), you must set up and never modify the following service impact codes for every institution in your system:

- AENR
- CENR
- ENVER
- IENR

These service impacts each have a unique usage within the system.

See *PeopleSoft 8 SP1 Student Records PeopleBook*, “Tracking Student Data,” Using PeopleSoft Student Records Service Impacts.

Positive Service Impact Select to indicate that the impact provides a service (as opposed to denying or restricting one).

System Function Select this check box to identify the service impact as one that is called by PeopleSoft program logic. For example, you must define the *CENR* service impact for each institution in our system because it is used by enrollment process logic.

See *PeopleSoft 8 SP1 Student Records PeopleBook*, “Tracking Student Data,” Using PeopleSoft Student Records Service Impacts.

Creating Service Indicators

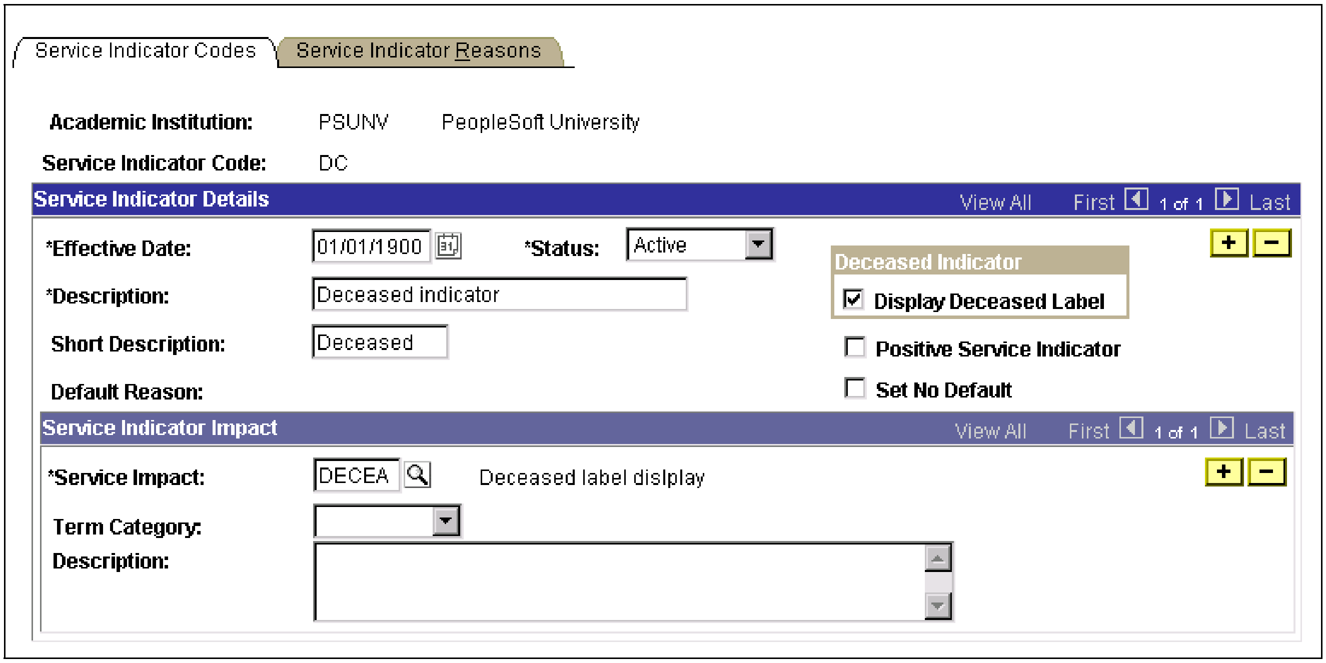
This section discusses how to create service indicator codes.

Page Used to Create Service Indicators

Page Name	Object Name	Navigation	Usage
Service Indicator Codes	SRVC_IND_CD_TABLE	• Design Student Administration, Define Student Administration, Setup, Service Indicator Table, Service Indicator Codes • Design Student Administration, Define Contributor Relations, Setup, Service Indicator Table, Service Indicator Codes • Manage Contributor Relations, Manage Prospects, Setup, Service Indicator Table, Service Indicator Codes • Manage Student Records, Manage Academic Records, Setup, Service Indicator Tables, Service Indicator Codes • Manage Student Records, Track Student Careers, Setup, Service Indicator Tables, Service Indicator Codes	Create service indicators code, for both positive and negative service indicators. You can also remove service indicators on this page.

Creating Service Indicator Codes

Access the Service Indicator Codes page.



Service Indicator Codes page

Service Indicator Details

Display Deceased Label Select to display the word *DECEASED* at the top of pages about individuals to whom this indicator is assigned in the future.

Warning! Select the Display Deceased Label check box *only* when creating a death service indicator. Selecting this for any other service indicator could cause the system to apply the deceased label to individuals who are not deceased. If this happens, substantial manual effort may be required to remove the deceased label from each individual's record.

Positive Service Indicator Select to indicate that the service indicator identifies a privilege or service to be provided.

For example, if you define a positive service indicator of *Conference Guest* and associate the service impact of *Front of Line,* then any person assigned the Conference Guest service indicator should receive front-of-line service at your institution.

Default Reason Displays the default reason associated with the service indicator.

Note. The system cannot display the default reason until the reason is defined and associated with the service indicator on the Service Indicator Reasons page.

Set No Default Select to prevent the system from displaying default values in the Service Indicator Reason Code and Department fields on the Service Indicators page.

Service Indicator Impact

Service Impact Identifies the service that is either restricted or provided by this service indicator.

Term Category Specify the single term category for which the service impact is valid. If you do not specify a term category, the service impact becomes valid for *all* terms.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Description Enter comments to further describe or identify the service impact as it relates to this service indicator.

See Also

Chapter 22, "Managing Service Indicators," Assigning or Removing Service Indicators, page 232

Setting Up Service Indicator Reasons

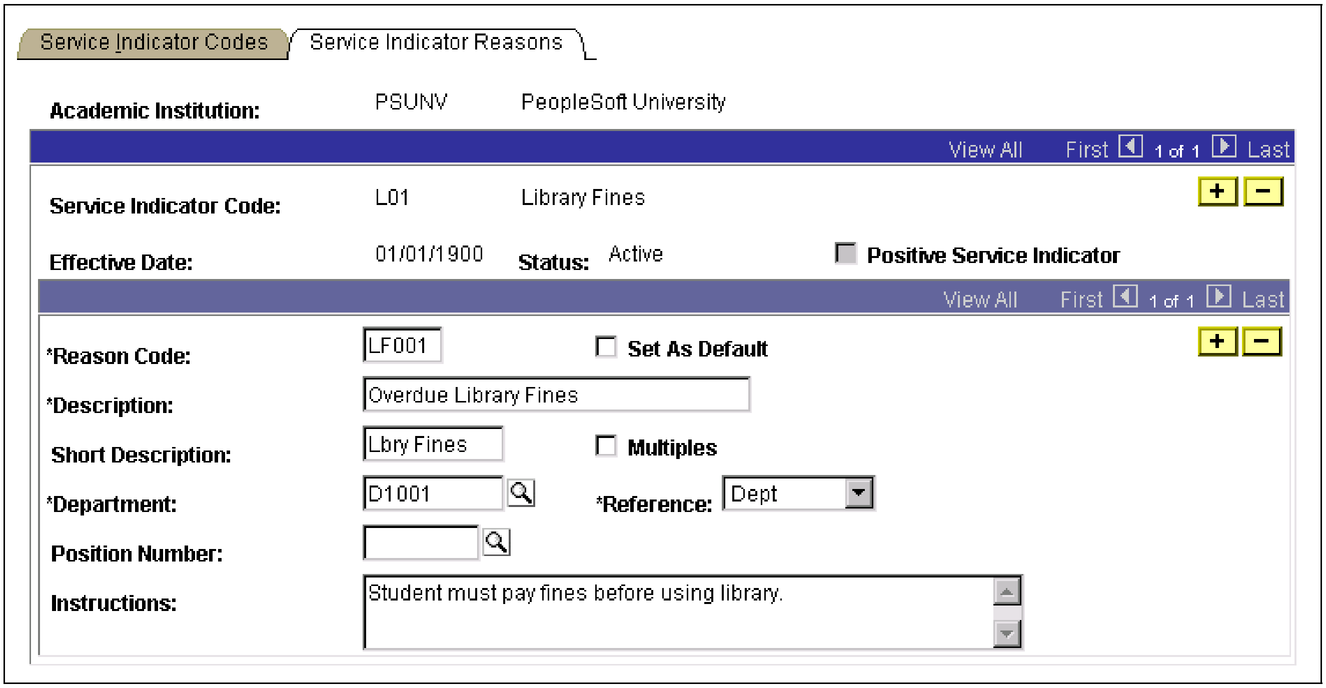
This section discusses how to define and associate service indicator reasons.

Page Used to Set Up Service Indicator Reasons

Page Name	Object Name	Navigation	Usage
Service Indicator Reasons	SRVC_IND_RSN_TABLE	• Design Student Administration, Define Student Administration, Setup, Service Indicator Table, Service Indicator Reasons • Design Student Administration, Define Contributor Relations, Setup, Service Indicator Table, Service Indicator Reasons • Manage Contributor Relations, Manage Prospects, Setup, Service Indicator Table, Service Indicator Reasons • Manage Student Records, Manage Academic Records, Setup, Service Indicator Tables, Service Indicator Reasons • Manage Student Records, Track Student Careers, Setup, Service Indicator Tables, Service Indicator Reasons	Define and associate reasons for a service indicator.

Defining and Associating Service Indicator Reasons

Access the Service Indicator Reasons page.



Service Indicator Reasons page

Positive Service Indicator Indicates that the service indicator identifies a privilege or service to be provided (as opposed to denied or restricted).

Reason Code Enter a code for the service indicator reason that you are creating.

Set As Default Select to associate this reason with the service indicator. You can select only one default reason for each service indicator.

When you save the page, the system displays this reason beside the Default Reason field label on the Service Indicators Codes page. When you assign the service indicator on the Service Indicator Data 1 page, the system displays this as the default reason (unless the Set No Default check box next to the Default Reason field on the Service Indicators Codes page is selected, in which case, no default reason displays).

Multiples Select to indicate that multiples of this service indicator can be assigned to the same student.

For example, if a student has many overdue library fines, selecting this option will allow the service indicator to be entered for each fine.

Department Select the department at your institution, from the Department Table page, that is responsible for this service indicator.

Reference Specify the entity *(Department, Department and Instructor,* or *Department Bill # and Instructions)* that identified the need for this service indicator.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Position Number Select the ID of the person or office that identified the need for this service impact.

Instructions

Enter comments or instructions to further describe or define this service indicator reason, or to identify what an individual must do to qualify for the removal of a negative service indicator.

The text that you enter here appears as the instructions for this hold on the Holds Details page in PeopleSoft Personal Portfolio Collaborative Application.

CHAPTER 7

Setting Up FERPA Control

This section provides an overview of FERPA and discusses how to:

- Make data available for FERPA control.
- Make publications available for FERPA exceptions.

Understanding FERPA

To comply with FERPA, you must, at minimum, make directory information available for privacy control. You must review the FERPA_VW records in your system and configure them to reflect the type of information that your institution uses as directory information.

The fields shipped on each FERPA_VW record delivered with your system, are *examples* of that type of directory information.

Note. No examples are shipped for the extracurricular activities view record (ACTVTS_FERPA_VW).

If the shipped examples do not reflect your institution's directory information, you should modify the relevant FERPA_VW records and other objects to adjust the data accordingly.

You can specify additional fields on existing FERPA_VW records to include more information within the same FERPA-controlled category (address, names, personal information, and so on).

You can also use PeopleSoft Application Designer (see your PeopleTools documentation) to do the following:

Create and add new FERPA_VW records to add new categories to your system's FERPA control. You must create a FERPA_VW record for each new category and modify the following to accommodate the new record:

- Records whose names start with FERPA.
- Views whose names end with FERPA_VW.
- PeopleCode attached to FERPA pages, including:
  - DERIVED_CS.FERPA_FLAG.FCH
  - DERIVED_CS.FERPA_PB.FCH
  - FUNCLIB_CS.FERPA_FLAG.FFO
  - PERSONAL_DATA.FERPA.RIN

Remove a field from the FERPA pages. You must also modify the view text on the appropriate pages.

- Use a SQL query tool or write an SQR program to remove all occurrences of the value from the field on the FERPA_OVERRIDE data (DELETE FROM PS_FERPA_OVERRIDE WHERE FIELDNAME='SEX').
- Remove the field from all other FERPA-related pages.
- Use Application Designer to remove the value from FERPA control.

Warning! Removing name, address, phone, and email fields from FERPA views will affect the directory listings in PeopleSoft Community Directory Collaborative Application. You may need to modify the directory load process.

See Also

Chapter 21, "Managing FERPA," page 221

Making Data Available for FERPA Control

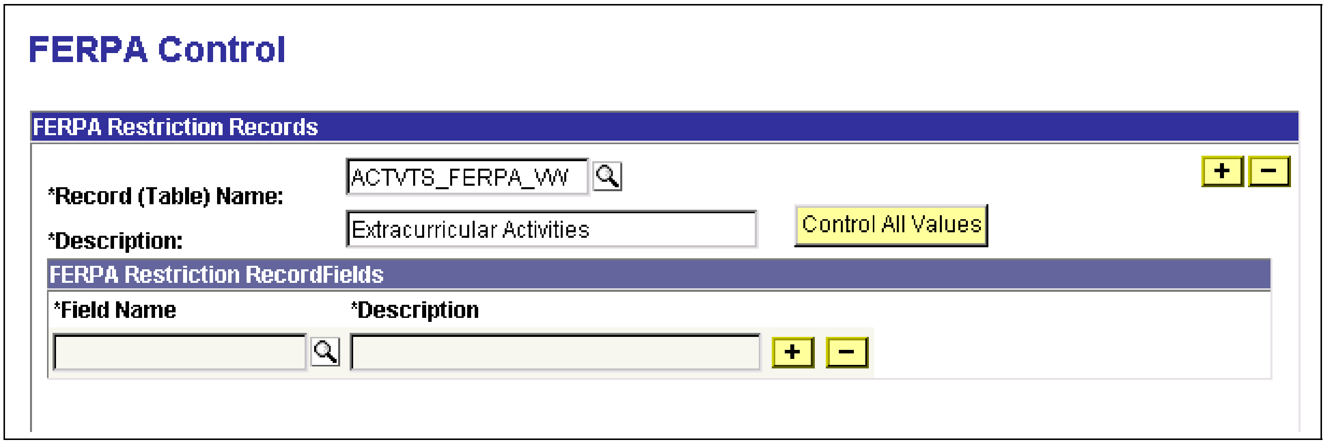
This section discusses how to make data available for FERPA control.

Pages Used to Make Data Available for FERPA Control

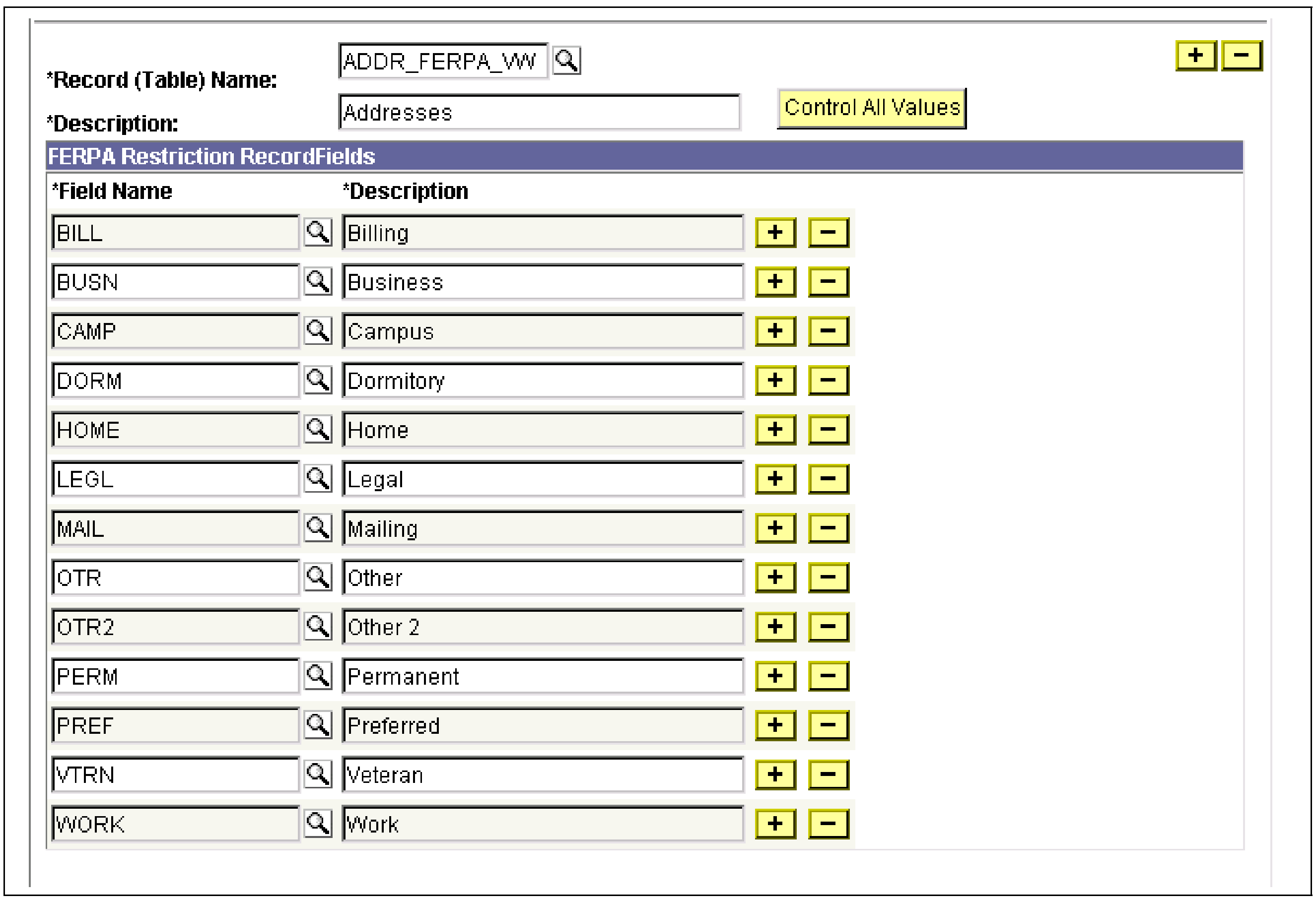
Page Name	Object Name	Navigation	Usage
FERPA Control	FERPA_CONTROL	Design Student Administration, Establish People Processing, Setup, FERPA Control, FERPA Control	Review or make additional directory data and other information available to FERPA privacy control.
Institution Publications	INST_PUB_TABLE	Design Student Administration, Define Campus Community, Setup, Institution Publications, Institution Publications	Create or review codes for your institution's publications.

Setting Data for FERPA Control

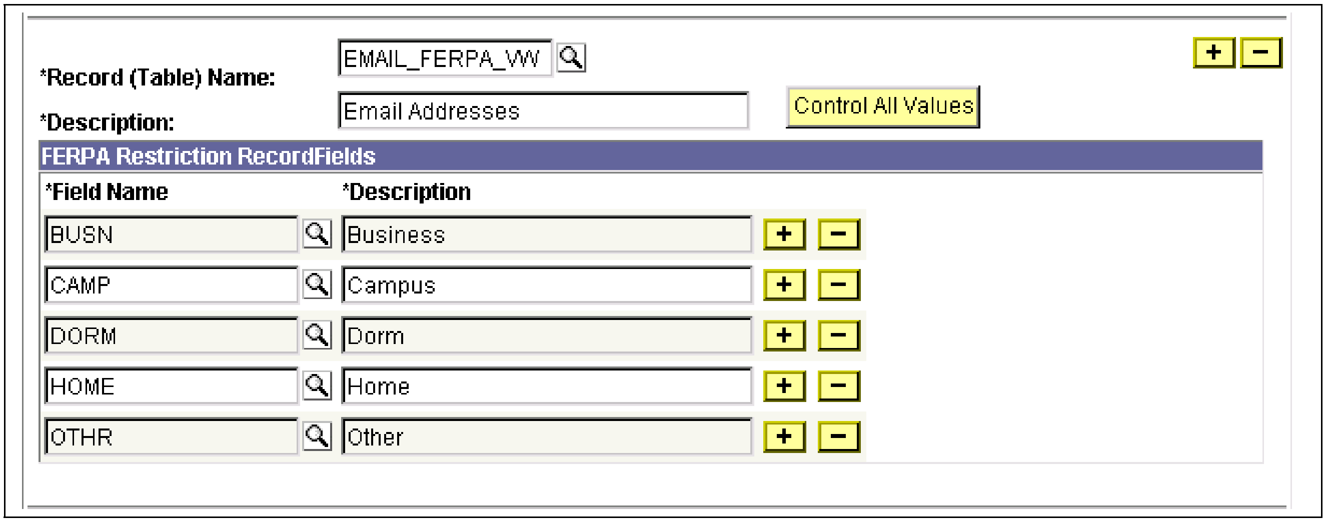
Access the FERPA Control page.



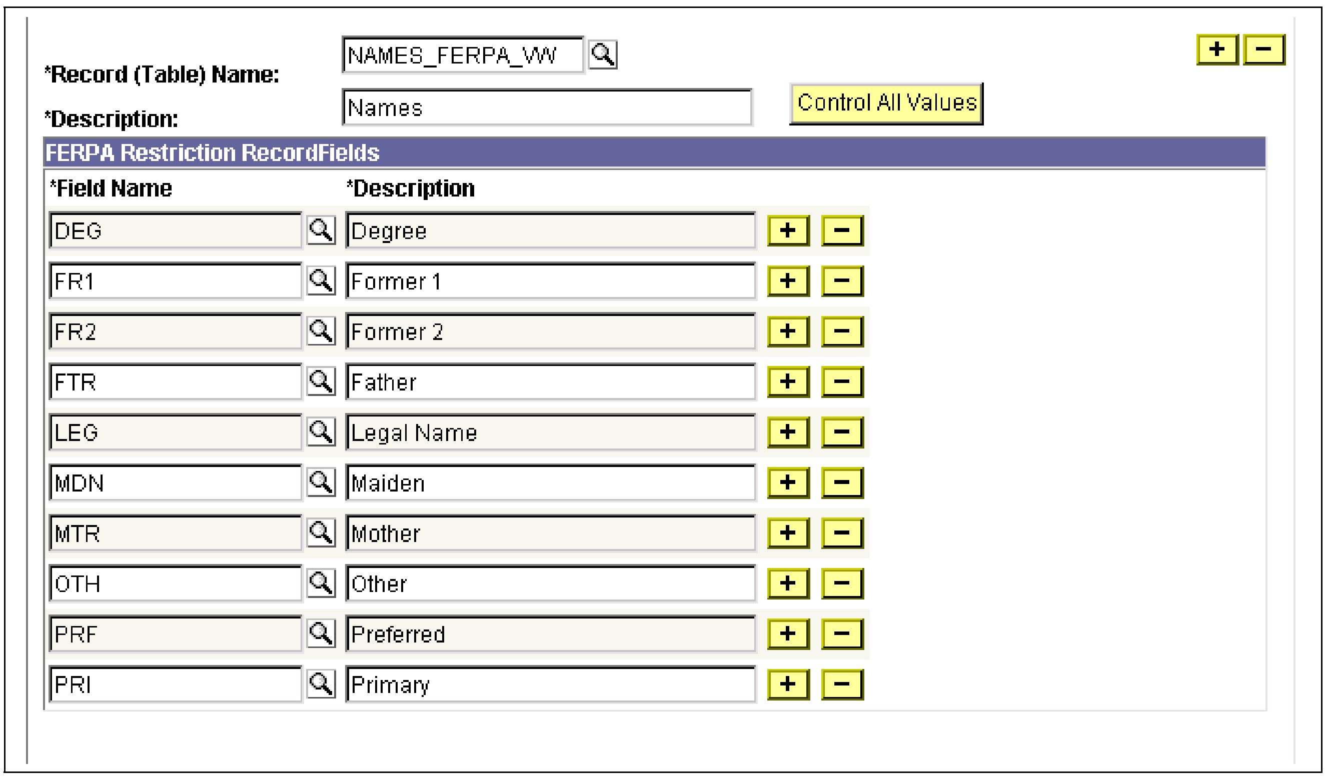
FERPA Control page (1 of 7) – Extracurricular Activities



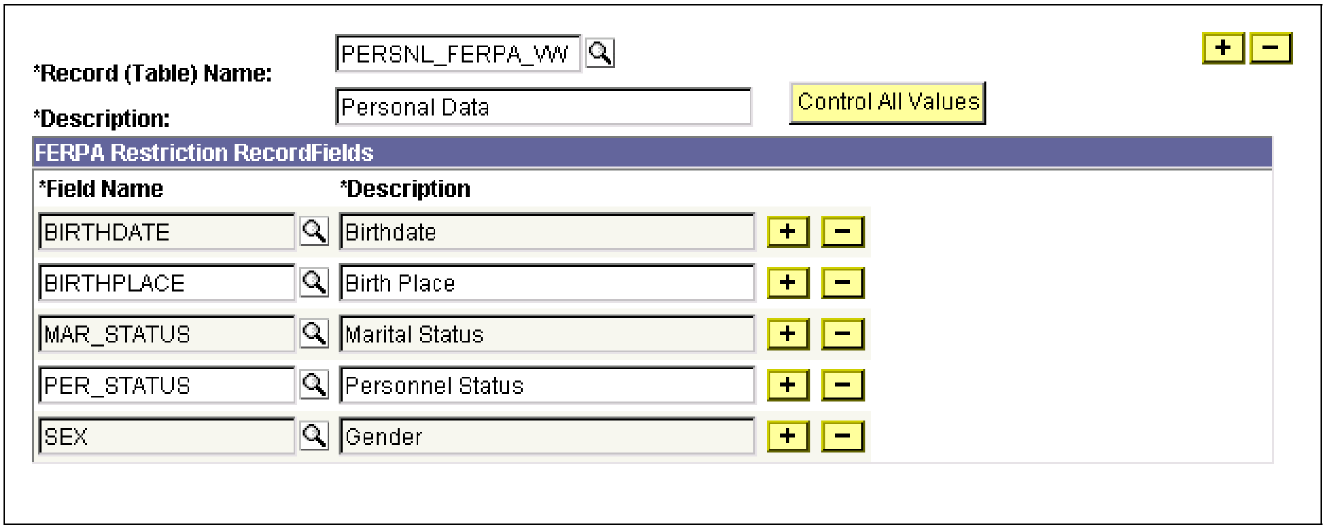
FERPA Control page (2 of 7) – Addresses



FERPA Control page (3 of 7) – Email Addresses



FERPA Control page (4 of 7) – Names



*Record (Table) Name: PERSNL_FERPA_VW

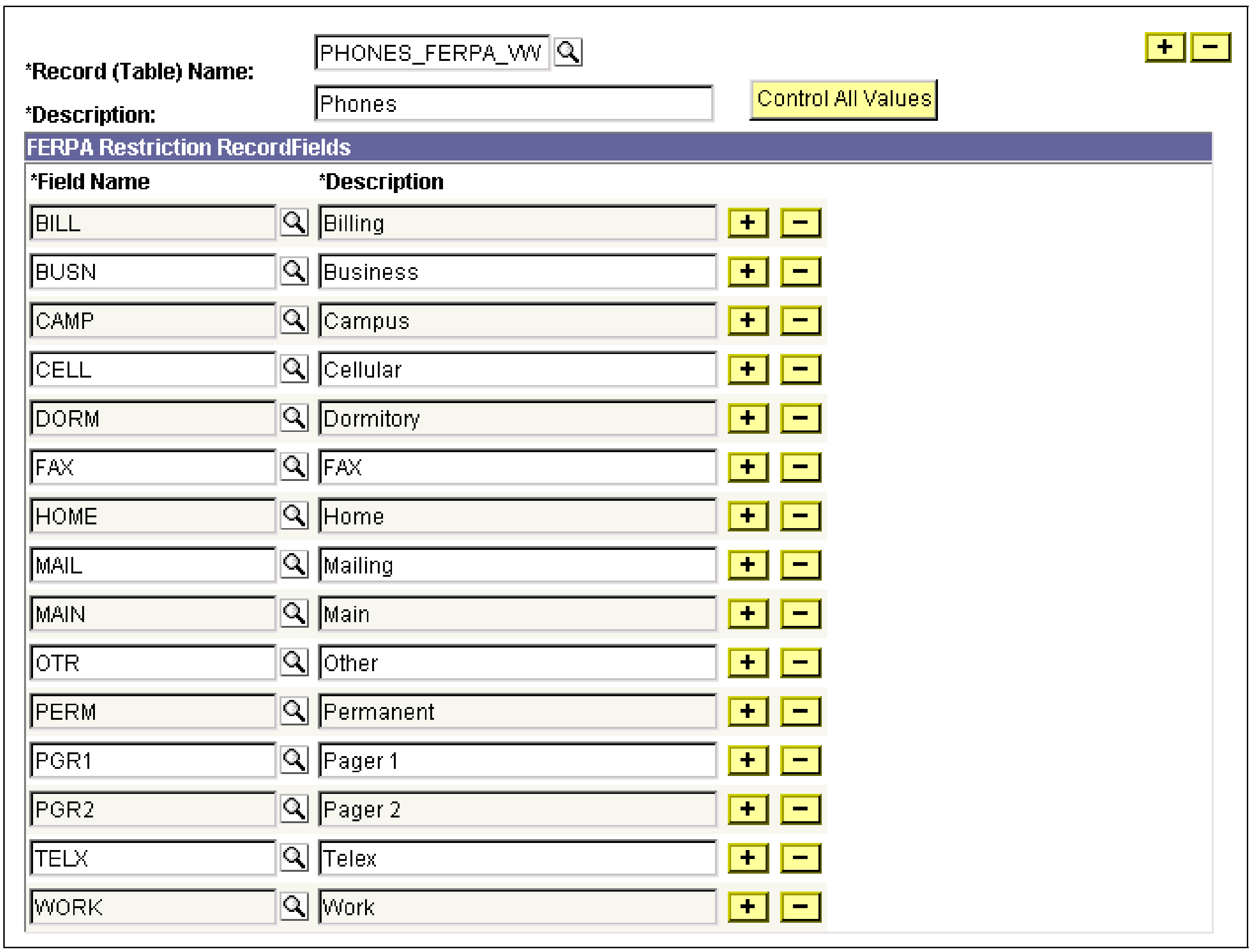
*Description: Personal Data

Control All Values

FERPA Restriction RecordFields

*Field Name	*Description
BIRTHDATE	Birthdate
BIRTHPLACE	Birth Place
MAR_STATUS	Marital Status
PER_STATUS	Personnel Status
SEX	Gender

FERPA Control page (5 of 7) – Personal Data



*Record (Table) Name: PHONES_FERPA_VW

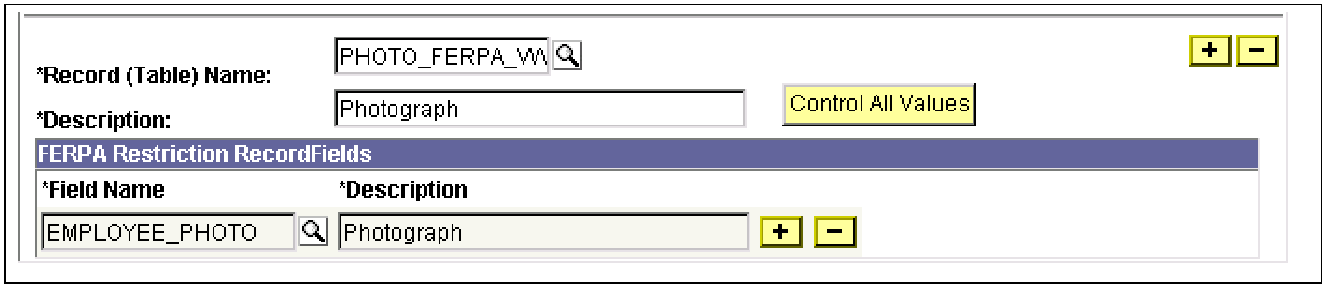
*Description: Phones

Control All Values

FERPA Restriction RecordFields

*Field Name	*Description
BILL	Billing
BUSN	Business
CAMP	Campus
CELL	Cellular
DORM	Dormitory
FAX	FAX
HOME	Home
MAIL	Mailing
MAIN	Main
OTR	Other
PERM	Permanent
PGR1	Pager 1
PGR2	Pager 2
TELX	Telex
WORK	Work

FERPA Control page (6 of 7) – Phones



FERPA Control page (7 of 7) – Photograph

FERPA Restriction Records

Record (Table) Name

The FERPA view record that contains the type of information that your institution uses for directories or that contains additional information that your institution wants to make available for privacy control.

The FERPA_VW records available are defined on the CC_FERPA_SEL_VW record. You can modify the view records.

Description

The system displays the description of the selected FERPA_VW record.

Control All Values

Click this button to display all of the type-based controlled fields (address, phone, name, and email) from the selected record and automatically make them available for privacy control.

FERPA Restriction RecordFields

Field Name

The name of the field, from the FERPA_VW record, which contains the information that your institution wants to make available for privacy control.

When you select the record (table) name, the fields on that record become available here. If you clicked the Control All Values button, the system displayed all the “type” based controlled fields (address, phone, name, and email). You can delete and add fields to configure them to your institution’s needs.

Description

The system displays the description of each field from the FERPA_VW record. You can modify the descriptions here.

These descriptions appear on the FERPA self-service page in PeopleSoft Personal Portfolio Collaborative Application. If you implement FERPA self-service, you might want to modify these descriptions.

Making Publications Available for FERPA Exceptions

This section provides an overview of making publications available for FERPA exceptions and discusses how to:

- Create publication codes.
- Define publication categories.

Understanding Publications as FERPA Exceptions

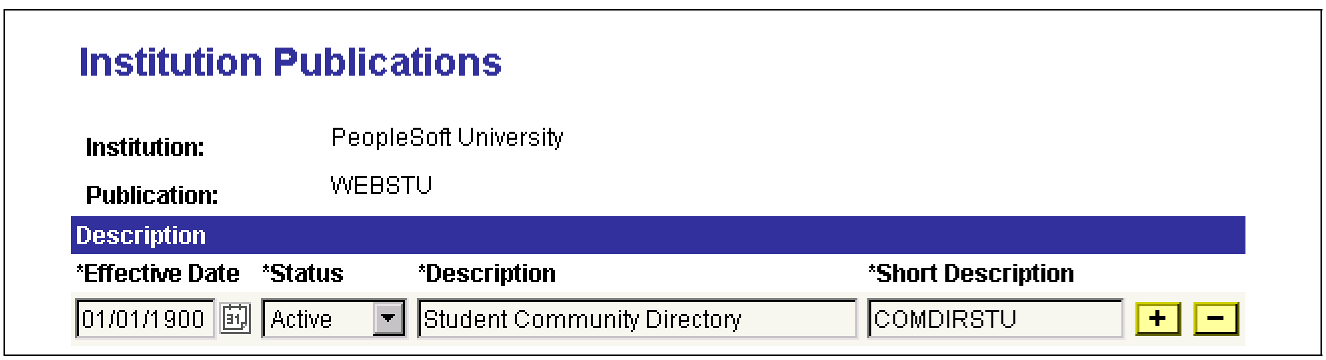
You can make publication categories available for exceptions to FERPA restrictions. Then students can elect to permit your institution to release otherwise restricted data for publication in certain types of publications created for your institution. For example, a student might restrict the release of her name, home address, and phone number but permit you to include it in your internal student community directory.

Pages Used to Make Publications Available for FERPA Exceptions

Page Name	Object Name	Navigation	Usage
Institution Publications	INST_PUB_TABLE	Design Student Administration, Define Campus Community, Setup, Institution Publications, Institution Publications	Create or review codes for each of your institution's publications.
Publication Categories	INST_CATG_TABLE	Design Student Administration, Define Campus Community, Setup, Publication Categories, Publication Categories	Organize your institution's publications into categories that you can make available for exception to an individual's FERPA restrictions.

Creating Publication Codes

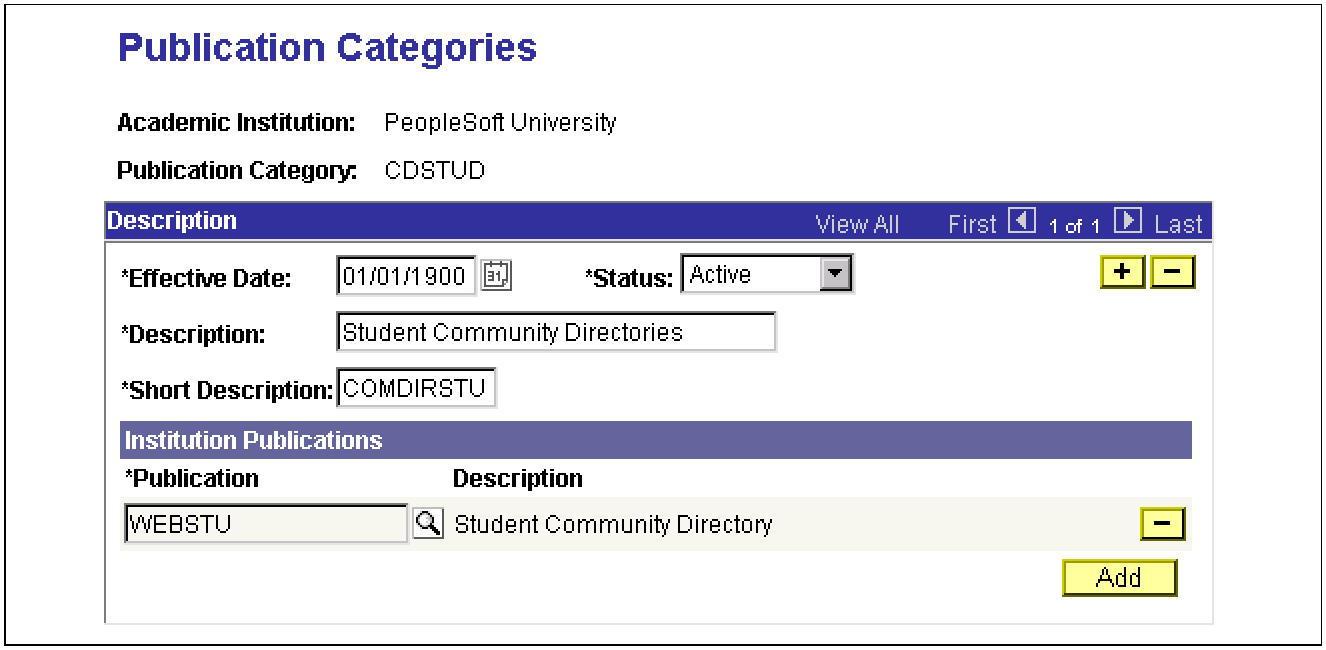
Access the Institution Publications page.



Institution Publications page

Defining Publication Categories

Access the Publication Categories page.



Publication Categories page

Note. Two publication categories are delivered with your system: *All Community Directories* and *Student Community Directory.* These are used in the PeopleSoft Community Directory Collaborative Application. You can add to new categories and add publications to the delivered categories, but do *NOT* delete the delivered categories.

Institution Publications

Publication The code, from the Institution Publications page, for the specific publication that falls into this category. You can add publications to this category.

CHAPTER 8

Setting Up Identification Data

This chapter provides an overview of setting up visa and permit data, and discusses how to:

- Set up visa and permit data.
- Set up residency data.
- Set up citizenship and passport data.

See Also

Chapter 29, “Managing Identification Data,” page 355

Setting Up Visa and Permit Data

This section discusses how to:

- Define supporting documents.
- Define visas and permits.

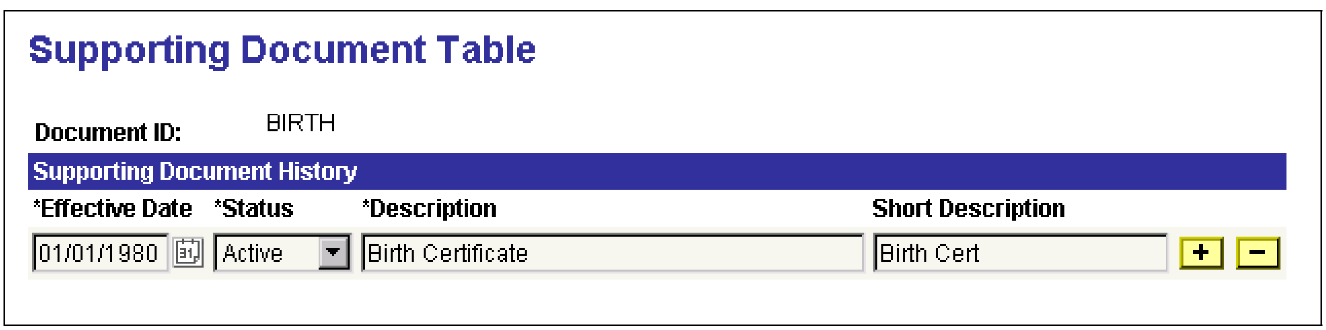
Pages Used to Set Up Visa and Permit Data

Page Name	Object Name	Navigation	Usage
Supporting Document Table	SUPPORT_DOC_TABLE	• Design Student Administration, Define Campus Community, Setup, Supporting Documents Table, Supporting Document Table • Administer Workforce, Administer Workforce (GBL), Setup, Supporting Document Table, Supporting Document Table • Administer Workforce, Administer Workforce (USF), Setup, Supporting Document Table, Supporting Document Table • Develop Workforce, Recruit Workforce (GBL), Setup, Supporting Document Table, Supporting Document Table • Administer Workforce, Track Global Assignments (GBL), Setup, Supporting Document Table, Supporting Document Table • Administer Workforce, Track Global Assignments (USF), Setup, Supporting Document Table, Supporting Document Table	Define identification codes for documents that are required to obtain I-9 verification for individuals.

Page Name	Object Name	Navigation	Usage
Visa/Permit Table	VISA_PERMIT_TABLE	• Design Student Administration, Define Campus Community, Setup, Visa/Permit Table, Visa/Permit Table • Administer Workforce, Administer Workforce (GBL), Setup, Visa/Permit Table, Visa/Permit Table • Administer Workforce, Administer Workforce (USF), Setup, Visa/Permit Table, Visa/Permit Table • Develop Workforce, Recruit Workforce (GBL), Setup, Visa/Permit Table, Visa/Permit Table • Administer Workforce, Track Global Assignments (GBL), Setup, Visa/Permit Table, Visa/Permit Table • Administer Workforce, Track Global Assignments (USF), Setup, Visa/Permit Table, Visa/Permit Table	Define codes for visas and permits required for non-citizens and their dependents.

Defining Supporting Documents

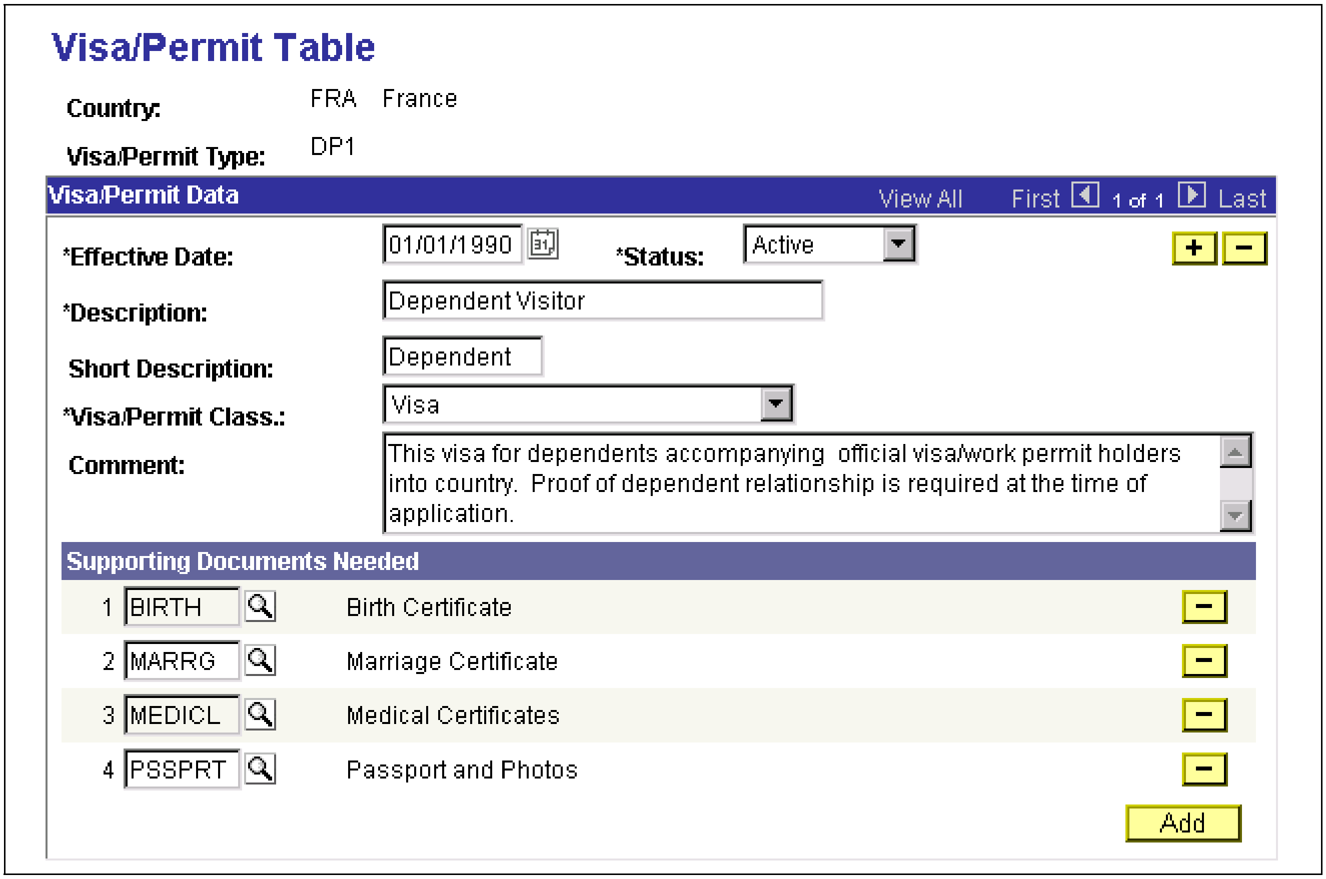
Access the Supporting Document Table page.



Supporting Document Table setup page

Defining Visas and Permits

Access the Visa/Permit Table page.



Visa/Permit Table page

Visa/Permit Classification

Select the type or classification of the visa or permit *(Residence Permit, Visa, Work Permit,* or *Work/Residence Permit).*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Comment

Enter comments to further describe or identify the visa or permit and its requirements.

Supporting Documents Needed

Select the supporting documents from the Supporting Documents Table page that are needed to obtain this visa or permit.

Setting Up Residency Rules

This section discusses how to:

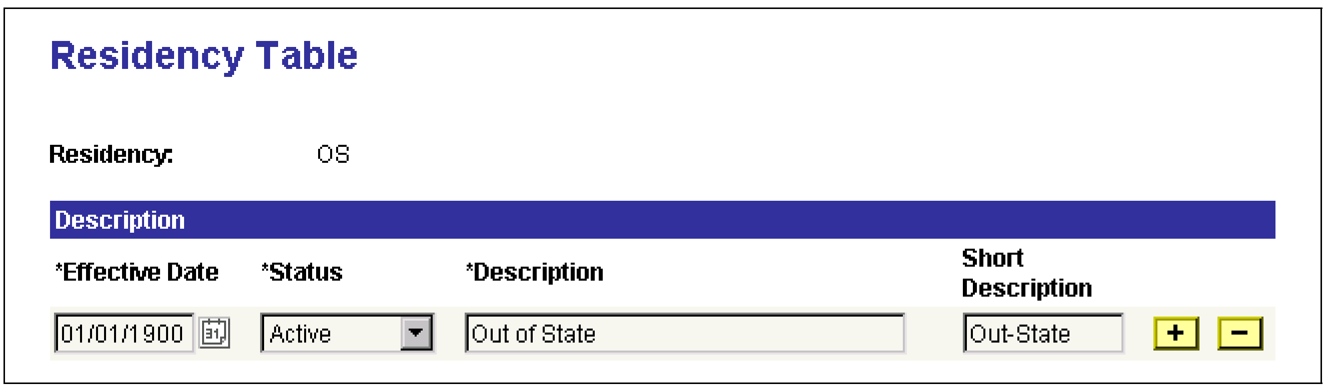
- Define residency rules codes.
- Define residency rule exceptions codes.

Pages Used to Set Up Residency Rules

Page Name	Object Name	Navigation	Usage
Residency Table	RESIDENCY_TABLE	Design Student Administration, Define Campus Community, Setup, Residency Table, Residency Table	Define codes for residency rules.
Residency Exception Table	RESID_EXCPT_TABLE	Design Student Administration, Define Campus Community, Setup, Residency Exception Table, Residency Exception Table	Define codes residency rule exceptions.

Defining Residency Rules

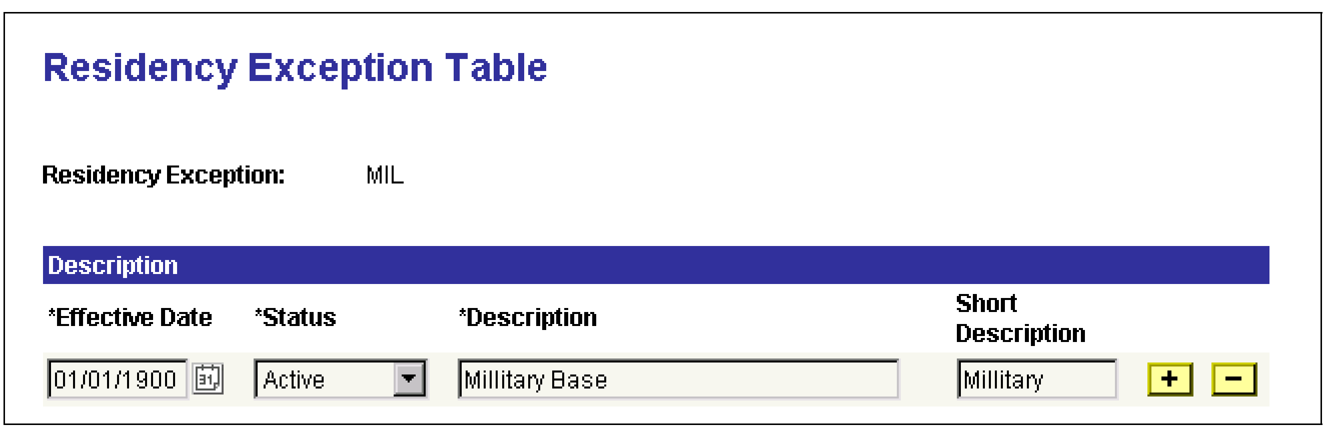
Access the Residency Table page.



Residency Table page

Defining Residency Rule Exceptions

Access the Residency Exception Table page.



Residency Exception Table page

Setting Up Citizenship and Passport Data

This section discusses how to define citizenship and passport data.

See Also

Chapter 29, “Managing Identification Data,” Entering Visa and Permit Data, page 368

Prerequisites

Before setting up citizenship and passport data, define country codes.

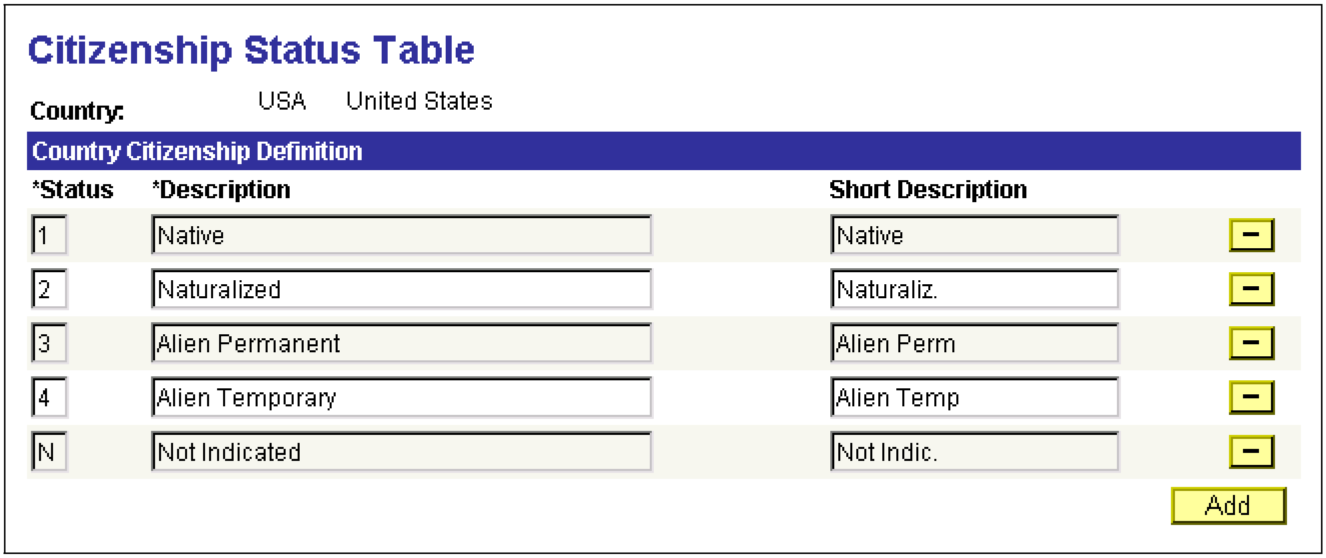
See Chapter 2, “Designing PeopleSoft Campus Community,” Reviewing or Defining Country Descriptions and Codes, page 9.

Page Used to Set Up Citizenship and Passport Data

Page Name	Object Name	Navigation	Usage
Citizenship Status	CITIZEN_STATUS	• Design Student Administration, Define Campus Community, Setup, Citizenship Status Table, Citizen Status • Administer Workforce, Administer Workforce (GBL), Setup, Citizen Status Table, Citizen Status • Administer Workforce, Administer Workforce (USF), Setup, Citizen Status Table, Citizen Status • Develop Workforce, Recruit Workforce (GBL), Setup, Citizen Status Table, Citizen Status • Develop Workforce, Recruit Workforce (USF), Setup, Citizen Status Table, Citizen Status • Administer Workforce, Track Global Assignments (GBL), Setup, Citizen Status Table, Citizen Status • Administer Workforce, Track Global Assignments (USF), Setup, Citizen Status Table, Citizen Status	Define or review levels of citizenship status for a country.

Defining Citizenship Status

Access the Citizen Status page.



Citizen Status page

Status Enter the code for the level of citizenship status. You must manually enter each status level code.

For each citizenship definition that you add, the system displays the next sequential reference number to the left of the status.

CHAPTER 9

Setting Up Health Data

This chapter discusses how to:

- Set up physicians.
- Set up diagnosis codes.
- Set up accommodations.
- Set up immunization and health data.

See Also

Chapter 31, “Managing Health Data,” page 383

Setting Up Physicians

You can identify individuals as physicians or other medical professionals by adding them to the Physician Table, thereby creating physician IDs for them. You can use those IDs to identify the individuals who administer the health tests that you track, including physical exams, immunizations, respiratory tests, and audiometric exams.

This section provides prerequisites and discusses how to:

- Enter a physician’s name.
- Enter a physician’s address.
- Enter a physician’s phone numbers.

Note. If the individual already exists in your system, he or she will have two system-generated IDs—one typical individual ID and one physician ID.

Prerequisites

Before you can set up physicians, you must set up their names and addresses.

See Also

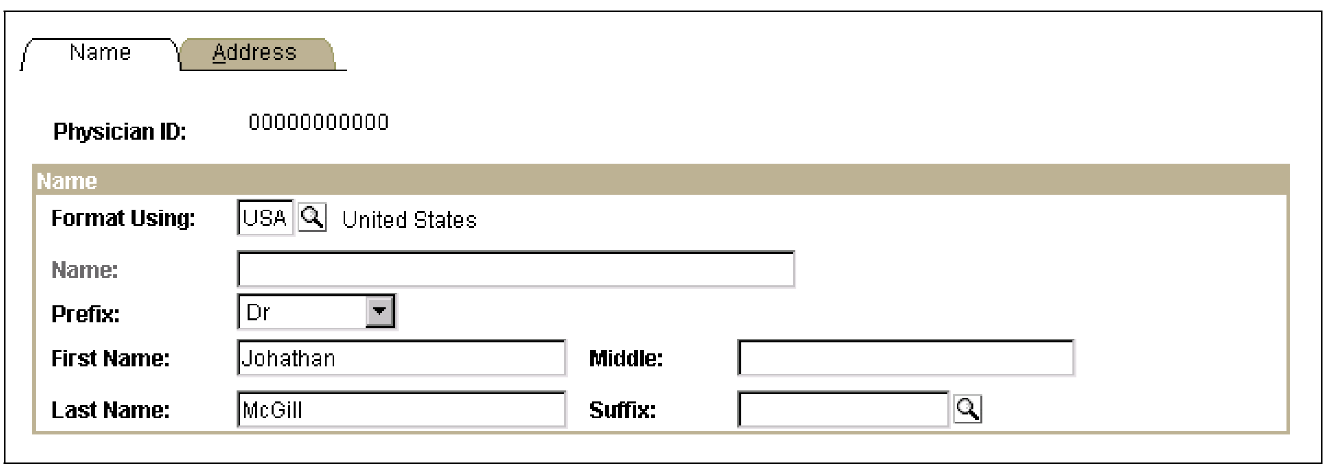
Chapter 2, “Designing PeopleSoft Campus Community,” Setting Up Name Formats and Usage, page 23

Pages Used to Set Up Physicians

Page Name	Object Name	Navigation	Usage
Physician Table – Name	HS_PHYSICIAN_DATA1	• Design Student Administration, Define Campus Community, Setup, Physician Table, Name • Monitor Workplace, Monitor Health/Safety (GBL), Setup, Physician Table, Name	Enter or review the name of a physician or other medical professional in your database.
Physician Table – Address	HS_PHYSICIAN_DATA1	• Design Student Administration, Define Campus Community, Setup, Physician Table, Name • Monitor Workplace, Monitor Health/Safety (GBL), Setup, Physician Table, Name	Enter or review the address of a physician or other medical professional in your database.
Phone Numbers	NE_PERS_DTAPH_SEC	Click the Phone link on the Physician Table – Address page.	Enter or review the phone numbers of a physician or other medical professional in your database.

Entering a Physician's Name

Access the Physician Table – Name page.



Physician Table – Name page

Format Using

Select the country whose name format will be used for this medical professional. The system displays the name fields based on the format for that country in the PeopleCode.

Name

After you save the page, the system displays the medical professional's name, concatenated, based on the country format.

Prefix Select the prefix for this medical professional—often but not always *Dr.* An audiologist, for example, might not be a doctor. The available prefixes are from the Prefixes page.

First Name Enter the medical professional's first name.

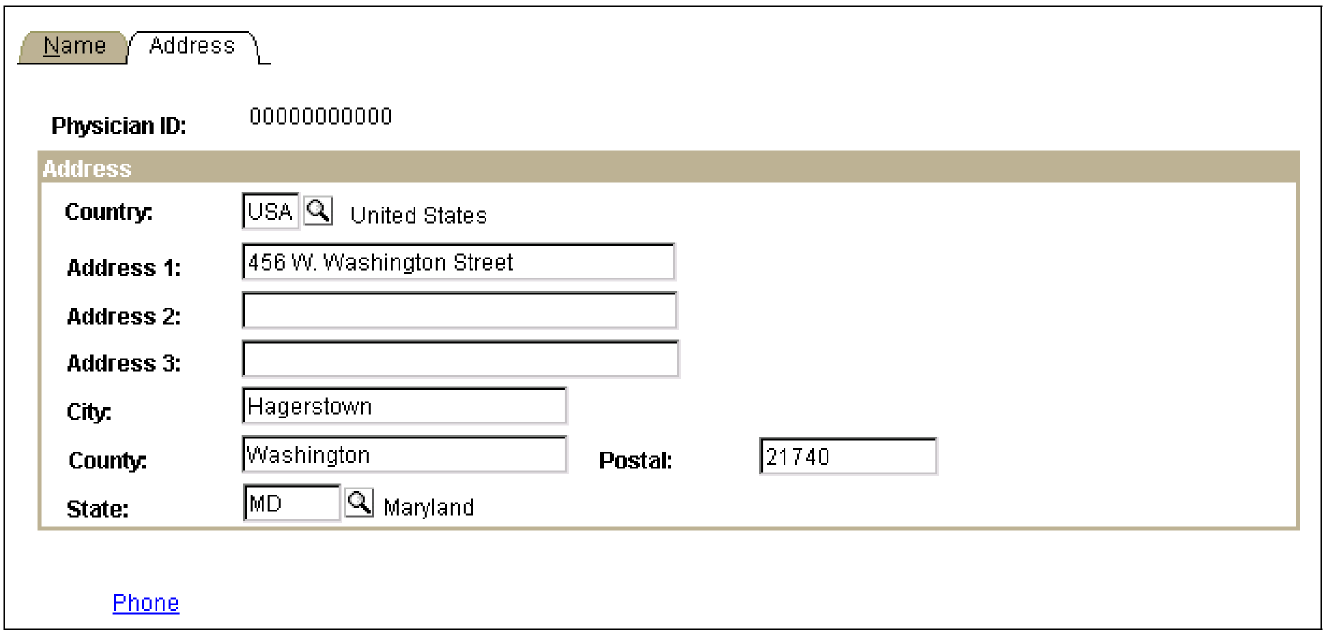
Middle Enter the medical professional's middle name.

Last Name Enter the medical professional's last name.

Suffix Select the suffix for this medical professional—often but not always *MD* or *DDS.* An audiologist, for example, might be a PhD. The available suffixes are from the Suffixes page.

Entering a Physician's Address

Access the Physician Table – Address page.



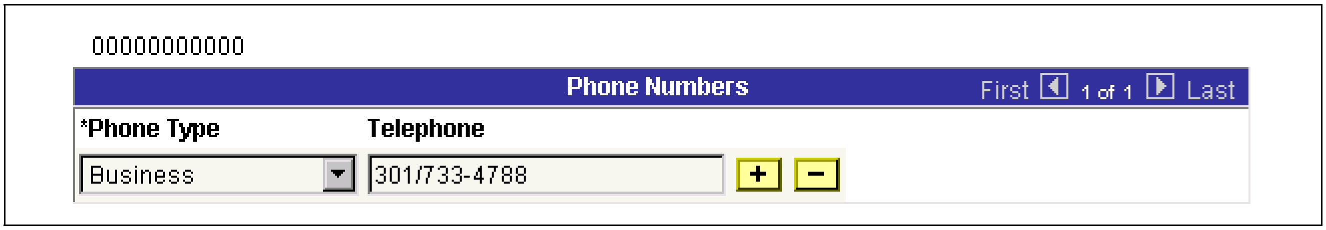
Physician Table – Address page

Country Select the country whose address format will be used for this physician. The system displays the address fields based on the format for the country as defined on the Country Table Address page.

Phone Click this link to access the Phone Numbers page, where you can enter phone data for this physician.

Entering a Physician's Phone Numbers

Access the Phone Numbers page.



Phone Numbers page

Phone Type Select the type of phone for this physician or other medical specialist.

Telephone Enter the telephone number of the specified type.

Setting Up Diagnosis Codes

Set up codes to identify injuries and illnesses and use them to monitor health and safety incidents. Physicians often use standard terminology to describe the results of their examinations. You can set up the same standard codes, such as those that the American Medical Association has established, or enter your own institution-specific codes.

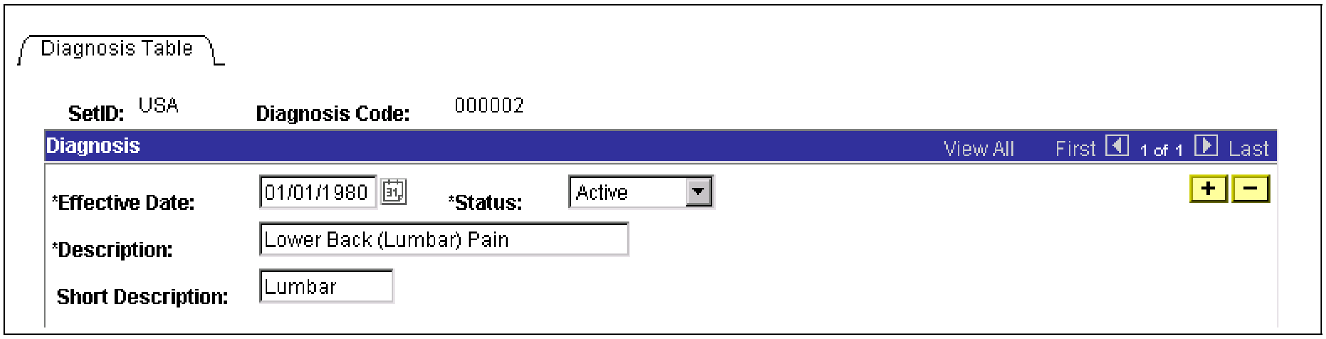
This section discusses how to set up diagnosis codes.

Pages Used to Set Up Diagnosis Codes

Page Name	Object Name	Navigation	Usage
Diagnosis Table	DIAGNOSIS_TABLE	• Design Student Administration, Define Campus Community, Setup, Diagnosis Table, Diagnosis Table • Monitor Workplace, Monitor Health/Safety (GBL), Setup, Diagnosis Table, Diagnosis Table • Monitor Workplace, Report Regulations (UK), Setup, Diagnosis Table, Diagnosis Table • Monitor Workplace, Report Regulations (US), Setup, Diagnosis Table, Diagnosis Table • Monitor Workplace, Report Regulations (USF), Setup, Diagnosis Table, Diagnosis Table	Create or review codes for injuries and illnesses that your institution wants to track.

Setting Up Diagnosis Codes

Access the Diagnosis Table page.



Diagnosis Table page

Setting Up Accommodations

Set up codes for the types of accommodations, such as purchasing special equipment or making structural changes to a classroom or work environment, that your institution makes for individuals with health restrictions and disabilities. You can use those codes to track the types of accommodations that your institution is requested or required to make and to track the changes that your institution approves and who is responsible for them.

This section discusses how to set up codes for the types of accommodations that your institution makes for individuals with health restrictions and disabilities.

Note. Several fields on the Accommodations pages—Regulatory Region, Job Code, Job Location, and Job Code Tasks—are defined on pages from the PeopleSoft Human Resources menus. If your institution uses PeopleSoft Human Resources Management System (HRMS), read your HRMS documentation to determine how those items are used in PeopleSoft Human Resources. Use shared accommodation fields as needed.

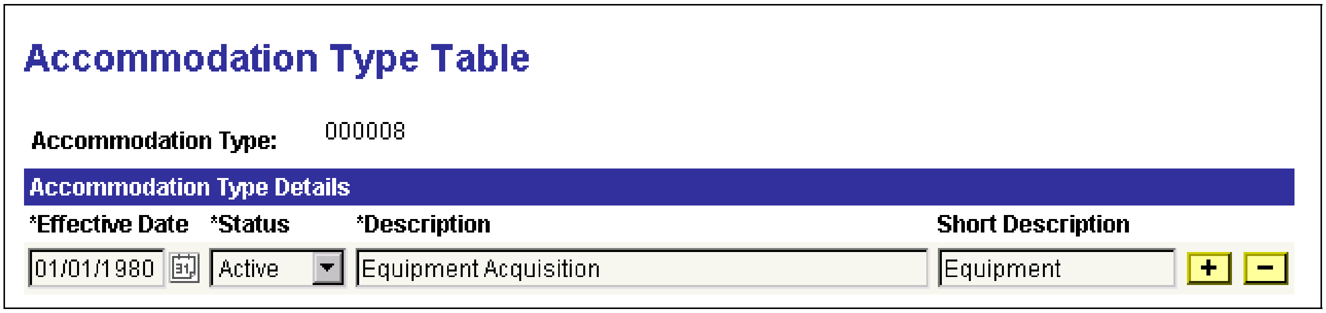
See Chapter 2, “Designing PeopleSoft Campus Community,” Setting Up PeopleSoft Campus Community/HRMS Shared Elements, page 12.

Page Used to Set Up Accommodations

Page Name	Object Name	Navigation	Usage
Accommodation Type Table	ACCOM_TYPE_TABLE	• Design Student Administration, Define Campus Community, Setup, Accommodation Type Table, Accommodation Type Table • Administer Workforce, Administer Workforce (USF), Setup, Accom Type Table, Accommodation Type Table • Develop Workforce, Recruit Workforce (GBL), Setup, Accommodation Type Table, Accommodation Type Table • Develop Workforce, Recruit Workforce (USF), Setup, Accommodation Type Table, Accommodation Type Table • Monitor Workplace, Report Regulations (UK), Setup, Accommodation Type Table, Accommodation Type Table • Monitor Workplace, Report Regulations (US), Setup, Accommodation Type Table, Accommodation Type Table • Monitor Workplace, Report Regulations (USF), Setup, Accommodation Type Table, Accommodation Type Table • Administer Workforce, Administer Workforce (GBL), Setup, Accommodation Type Table, Accommodation Type Table	Set up codes for the types of accommodations that your institution makes for individuals with health restrictions and disabilities.

Setting Up Accommodations

Access the Accommodation Type Table page.



Accommodation Type Table page

Setting Up Immunization and Health Test Types

Set up codes to identify the immunization and general health tests that your institution requires or that students typically choose to report. You can use those codes to record and track an individual's immunization and general health test data.

This section discusses how to:

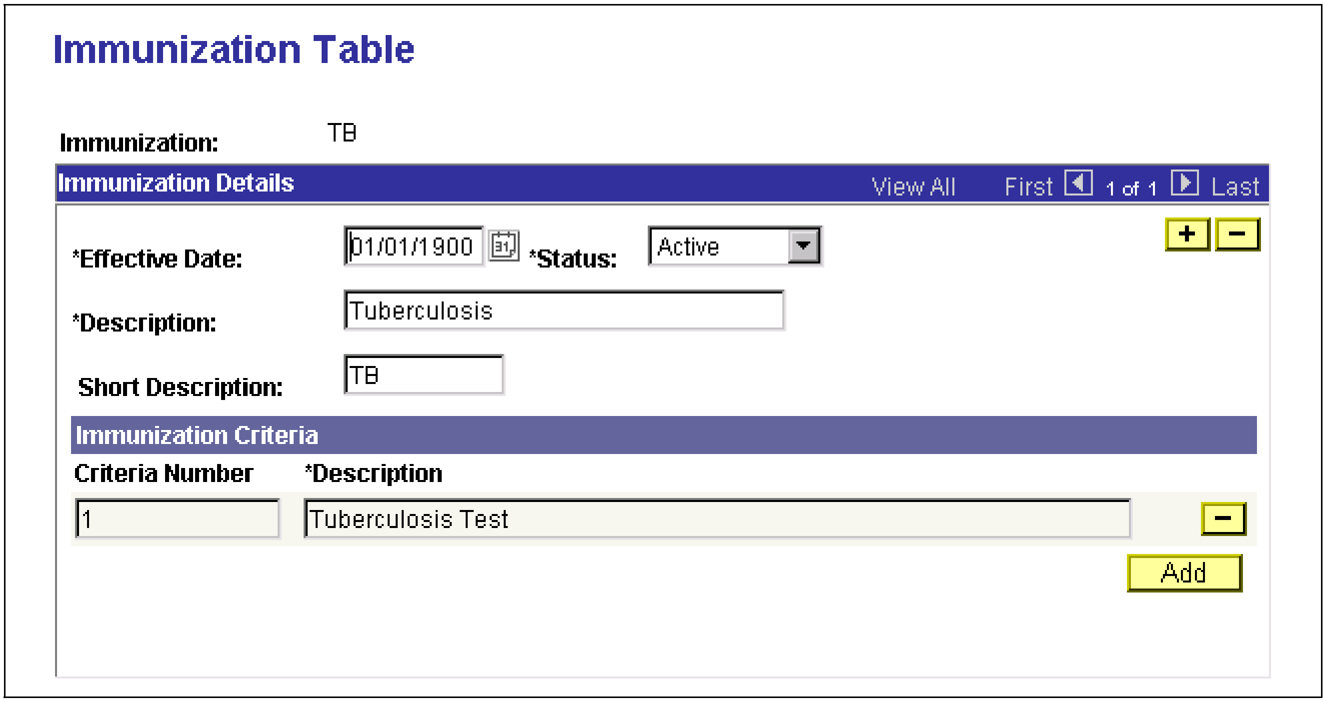
- Define immunization test codes.
- Define health test codes.

Pages Used to Set Up Immunization and Health Data

Page Name	Object Name	Navigation	Usage
Immunization Table	IMMUNIZATION_TABLE	Design Student Administration, Define Campus Community, Setup, Immunization Table, Immunization Table	Define or review codes for immunization tests.
Health Test Table	HEALTH_TST_TABLE	Design Student Administration, Define Campus Community, Setup, Health Test Table, Health Test Table	Define or review codes for health tests.

Defining Immunization Test Codes

Access the Immunization Table page



Immunization Table page

Immunization Criteria

Use the fields in this group box to set up a numbered list of events or any list of items to associate with this immunization. These fields are optional.

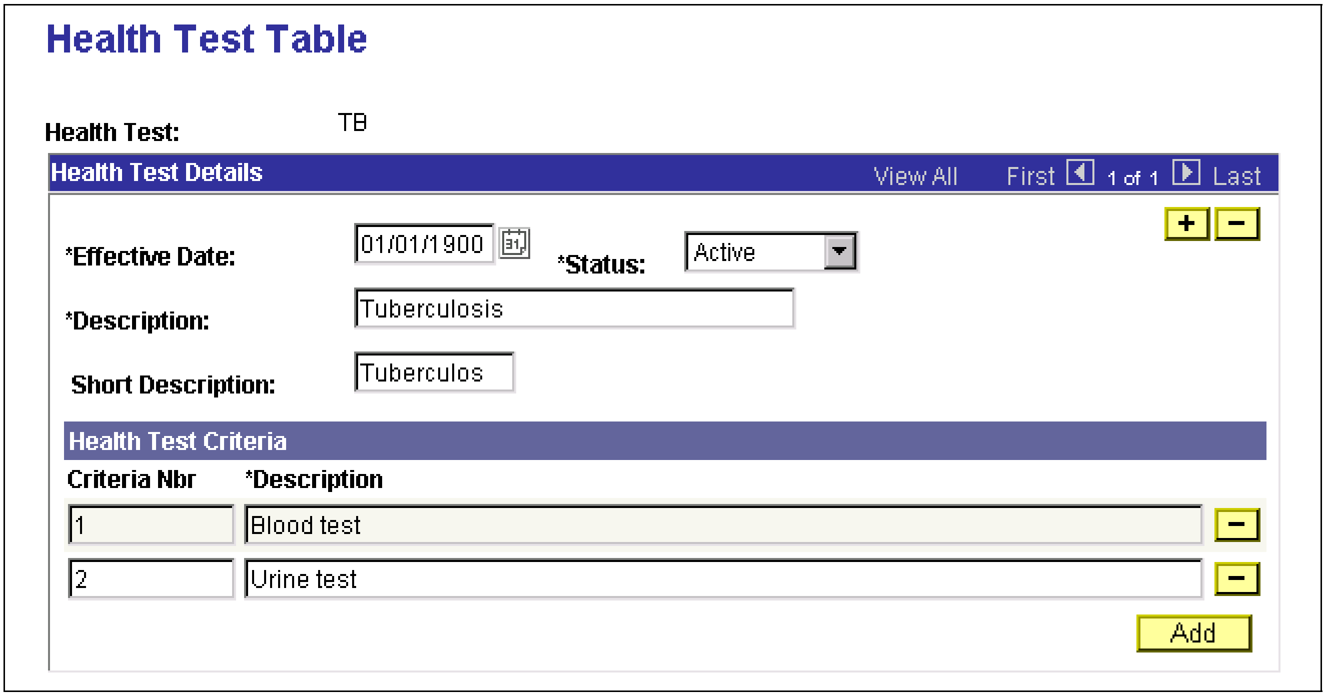
Criteria Number The number of this item on the list of criteria for this immunization.

The system displays the next sequential number for each item that you add. You can use these numbers as reference IDs for items in a random ordered list. Or you can override them to reorder the list of items to reflect the order in which the events must occur.

Description Enter the description of this item or event.

Defining Health Test Codes

Access the Health Test Table page.



Health Test Table page

Health Test Criteria

Use the fields in this group box to set up a numbered list of events or any list of items to associate with this health test. These fields are optional.

Criteria Number The number of this item on the list of criteria for this health test.

The system automatically enters the next sequential number for each item that you add. You can use these as reference IDs for items in a random ordered list or override them to reorder the list of items to reflect the order in which the events must occur.

Description Enter the description of this item or event.

CHAPTER 10

Setting Up Participation Data

This section discusses how to:

- Set up athletic participation.
- Set up extracurricular activities.
- Set up honors and awards.
- Set up licenses and certificates.
- Set up memberships.

See Also

Chapter 30, “Managing Participation Data,” page 373

Setting Up Athletic Participation

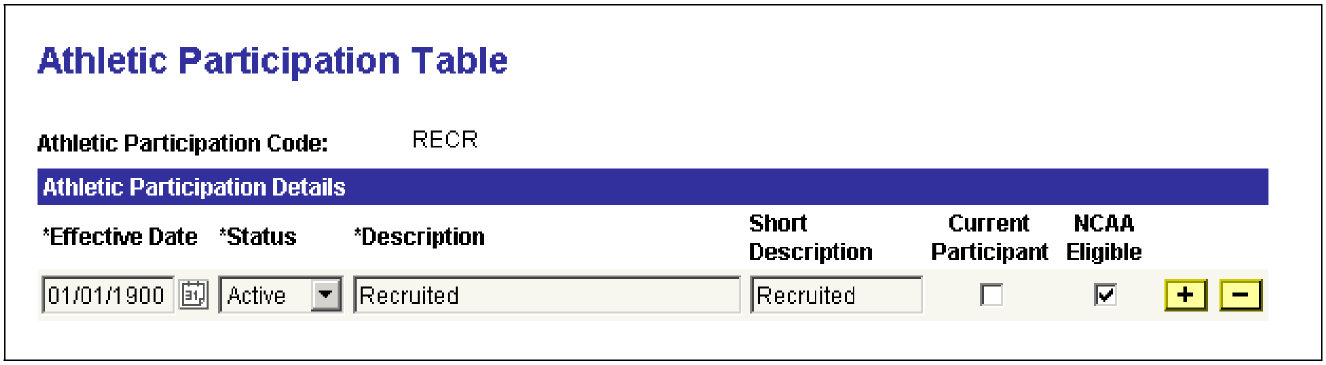
This section discusses how to set up athletic participation codes.

Page Used to Set Up Athletic Participation

Page Name	Object Name	Navigation	Usage
Athletic Participation Table	ATHL_PART_TABLE	Design Student Administration, Define Campus Community, Setup, Athletic Participation Table, Athletic Participation Table	Use the Athletic Participation Table page to set up or review athletic participation codes.

Defining an Athletic Participation Code

Access the Athletic Participation Table page.



Athletic Participation Table page

Current Participant When selected, indicates that the default value associated with this code is a current participation.

NCAA Eligible When selected, indicates that the default value associated with this code is a current eligibility to participate according to NCAA (National Collegiate Athletic Association) rules and regulations.

Setting Up Extracurricular Activities

This section discusses how to set up extracurricular activity codes.

See Also

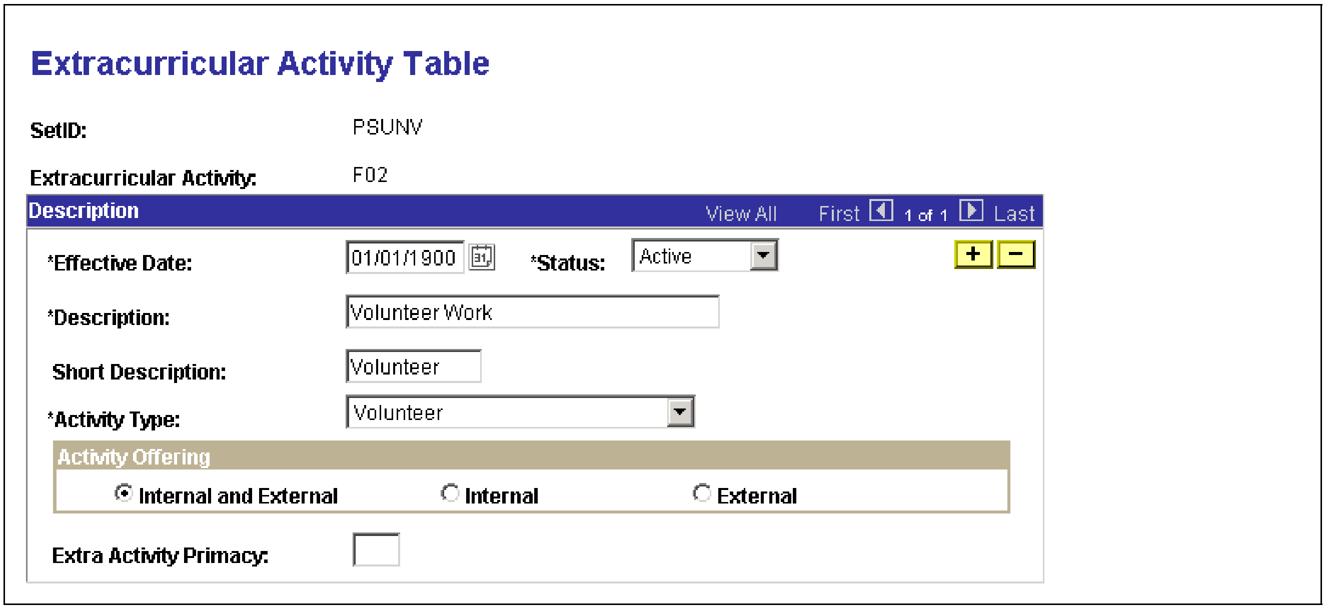
PeopleSoft 8 SP1 Student Records PeopleBook, "Preparing to Track Student Data," Setting Up Extracurricular Activities

Page Used to Set Up Extracurricular Activities

Page Name	Object Name	Navigation	Usage
Extracurricular Activity Table	EXTRA_ACTIVITY_TBL	• Design Student Administration, Define Campus Community, Setup, Extracurricular Activity Tbl, Extracurricular Activity Tbl • Manage Student Records, Track Student Careers, Setup, Extracurricular Activity Tbl, Extracurricular Activity Tbl	Use the Extracurricular Activity Table page to set up or review the types of student activities to track.

Defining an Extracurricular Activity Code

Access the Extracurricular Activity Table page.



Extracurricular Activity Table page

Activity Type

The type of activity (*Athletics, Student Government, Theater, Volunteer* and so on).

Activity type values are delivered with your system as translate values. You can modify these translate values if necessary.

Internal and External

When selected, indicates that this activity is offered within and outside of your institution.

Internal

When selected, indicates that this activity is offered only within your institution.

External

When selected, indicates that this activity is offered only outside of your institution.

Extra Activity Primacy

The number that describes the level of importance of this extracurricular activity. The lower the number the higher the importance.

For example, a primacy number of *1* indicates that this is a primary or most important activity. A primacy number of *10* indicates that this is an activity of much lesser importance.

Setting Up Honors and Awards

See *PeopleSoft 8 SP1 Student Records PeopleBook*, “Preparing to Track Student Data,” Setting Up Honors and Awards.

Setting Up Licenses and Certificates

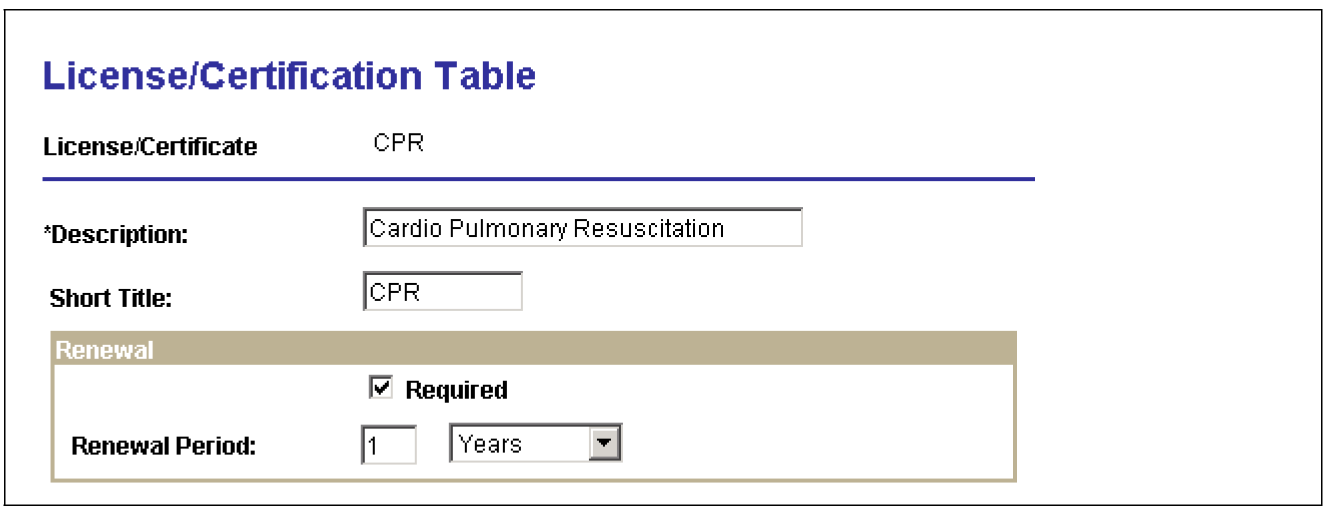
This section discusses how to set up license and certificate codes.

Page Used to Set Up Licenses and Certificates

Page Name	Object Name	Navigation	Usage
License/Certification Table	LICENSE_CERTIF_TBL	• Design Student Administration, Define Campus Community, Setup, License/Certification Table, License/Certification Table • Develop Workforce, Administer Training (GBL), Setup, License/Certification Table, License/Certification Table	Use the License/Certification Table page to specify licenses and certificates such as official credentials, legal documents, and so on, that may be required or of interest to your institution.

Defining a License or Certificate Code

Access the License/Certification Table page.



License/Certification Table page

Description The full description or official title for this license or certificate.

Short Title The short title or official abbreviation for this license or certificate.

Required When selected, indicates that the license or certificate requires periodic renewal, which makes the Renewal Period fields become available.

Renewal Period

When the Required option is selected, these fields are available. Use these to indicate how often the license or certificate must be renewed. Enter a number in the first field, and select the appropriate period (*Days, Weeks, Months, Years,* or *Invalid Value*) from the second field.

Renewal period values are delivered with your system as translate values. You can modify these translate values if necessary.

Setting Up Memberships

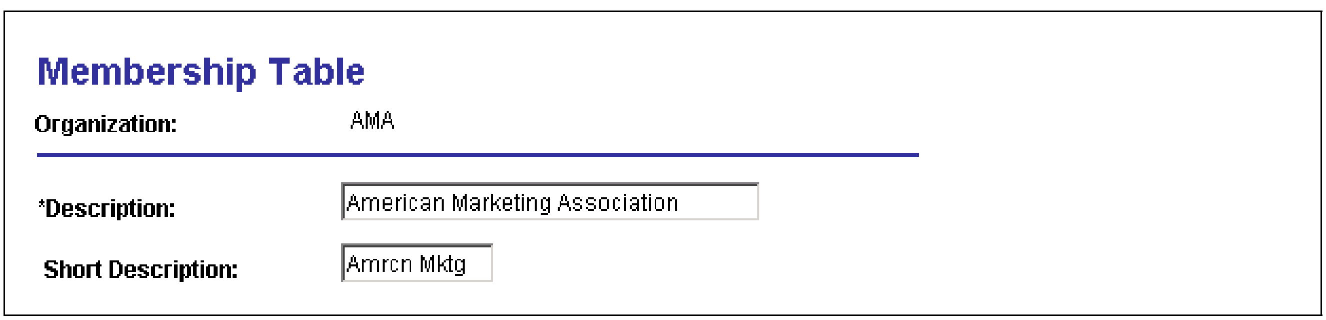
This section discusses how to set up membership codes.

Page Used to Set Up Memberships

Page Name	Object Name	Navigation	Usage
Membership Table	MEMBERSHIP_TABLE	• Design Student Administration, Define Campus Community, Setup, Membership Table, Membership Table • Develop Workforce, Administer Training (GBL), Setup, Membership Table, Membership Table	Use the Membership Table page to create codes for memberships that you institution wants to track.

Defining a Membership Code

Access the Membership Table page.



Membership Table page

CHAPTER 11

Setting Up Organization Data

This section discusses how to:

- Define groups and contacts.
- Create organization codes.
- Define external subjects and terms.

See Also

Chapter 33, "Adding Organizations to Your Database," page 409

Chapter 34, "Managing Organization Data," page 425

Chapter 35, "Loading External Organization Data," page 453

Defining Organization Groups and Contacts

This section provides an overview of group types and discusses how to:

- Define organization group types.
- Define contact types.

Understanding Group Types

Group types and codes within each group type enable you to group similar organizations together at a high level and further define them into specific categories. For example, in admissions, if you could group organizations according to their academic quality by setting up a high-level group type of *Academic Quality.* Within that group type, you could further identify each organization in the group by assigning group codes of *Below Average, Average,* and *Highly Competitive.* Some organization group types are already predefined when your system is shipped. Review these to be sure they meet your institution's needs; create others if necessary.

You can also set up the types of contact persons typically available to your institution. Contact types help you to identify the role of the contact person at each organization in your database. For example, you might indicate in that the contact for Cottonwood High School is Mr. Raymond Scott, but you probably also want to specify whether he is a teacher, guidance counselor, or the principal there.

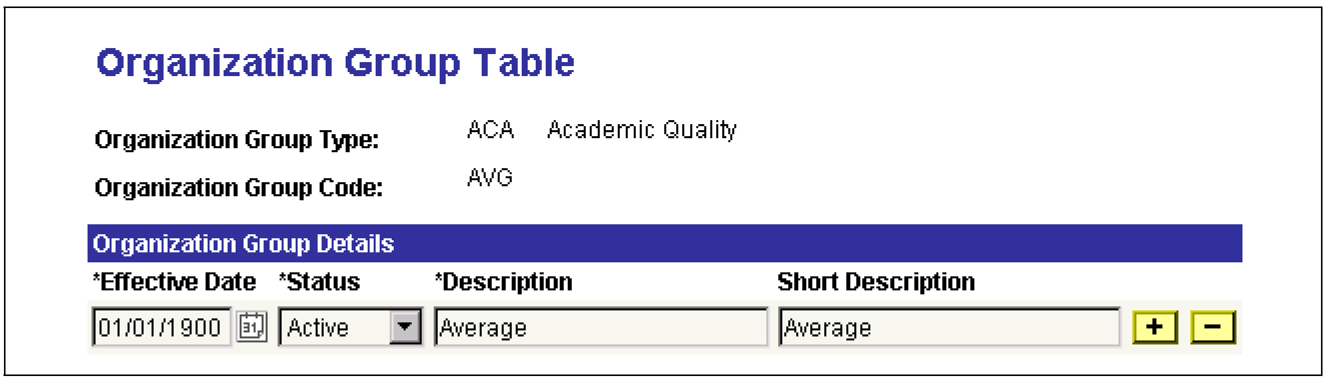
While the examples provided relate to schools, group types, group codes, and contact types can help you organize all types of organizations in your system.

Pages Used to Define Groups and Contacts

Page Name	Object Name	Navigation	Usage
Organization Group Table	ORG_GROUP_TABLE	Build Community, Organization Data, Setup, Organization Group Table, Organization Group Table	Define organization group types and associate group codes with them.
Contact Type Table	ORG_CNTC_TYP_TABLE	• Build Community, Organization Data, Setup, Contact Type Table, Contact Type Table • Manage Contributor Relations, Manage Organizations, Setup, Contact Type Table, Contact Type Table	Define the type of contacts that your institution might have with the organizations.

Defining Organization Group Types

Access the Organization Group Table page

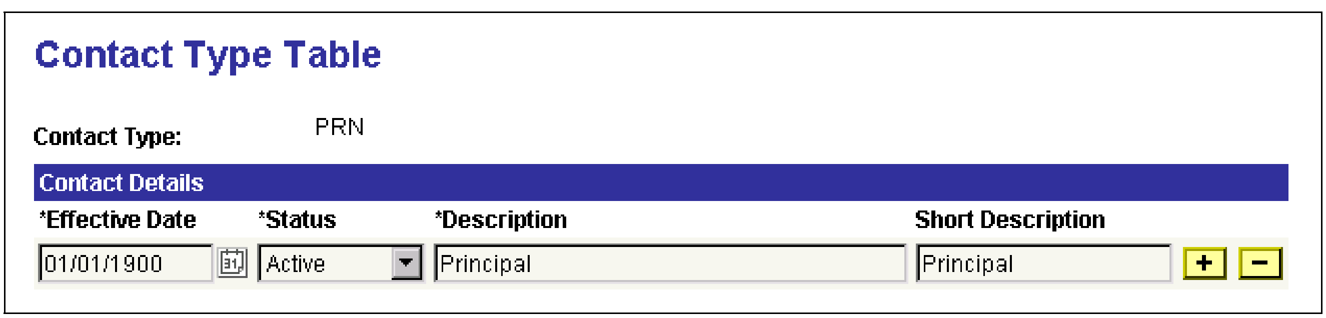


Organization Group Table page

Note. Be careful not to confuse the Organization Group Table page described here, with the External Organization Code Type page (in the same setup menu) where you assign external codes to organizations, including EPS market codes.

Defining Contact Types

Access the Contact Type Table page.



Contact Type Table page

Creating Organization Codes

This section discusses how to load or define external codes for organization types.

Understanding Organization Codes

Load or set up external agency codes to make them available to associate with organizations. For example, if your institution loads EPS (Enrollment Planning Service) market codes, the load process enters each code on the External Organization Code Type table. Those codes are then available for you to assign to organizations on the Organization External Codes page.

See Also

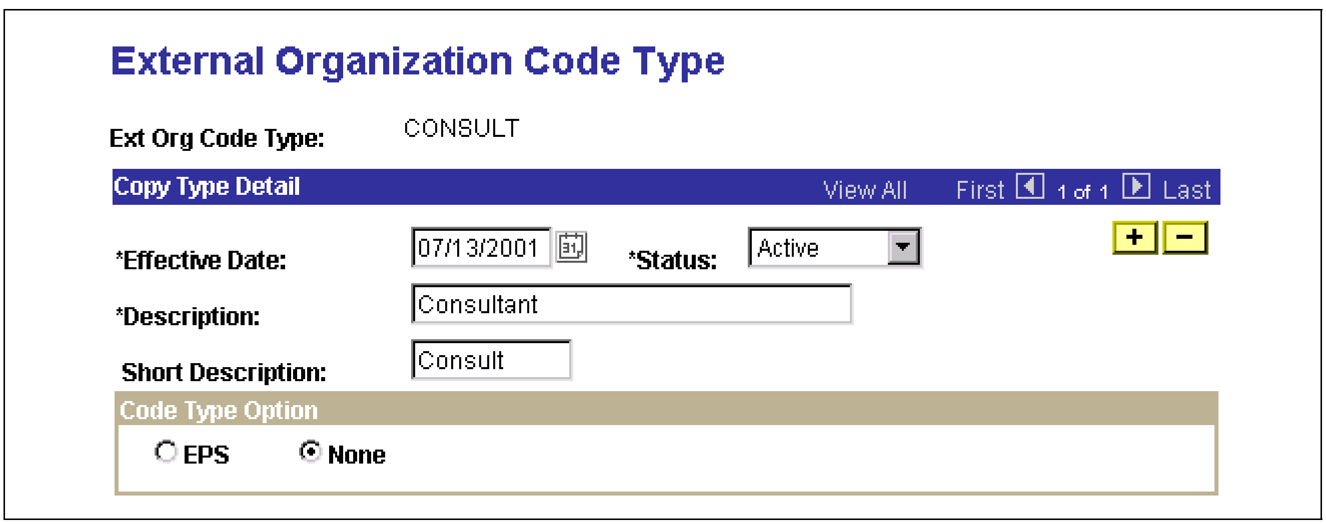
PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Loading and Assigning EPS Market Codes"

Page Used to Create Organization Codes

Page Name	Object Name	Navigation	Usage
External Organization Code	EXTORGCDTYPE_TABLE	Build Community, Organization Data, Setup, Ext Org Code Type Table, Ext Org Code Type Table	Load or define external codes for organization types.

Loading or Defining External Codes for Organization Types

Access the External Organization Code Type page.



External Organization Code Type page

EPS Select to indicate that this code is an EPS market code.

None Select to indicate that this code is not an EPS market code.

Setting Up External Subjects, Terms, and Courses

This section provides an overview of external subjects, terms and courses, and discusses how to:

- Define external subject categories.
- Define external term sessions.

Understanding External Subjects, Terms, and Courses

External subjects are general subject areas that you define for the purpose of categorizing external courses.

Set up external subject categories to broadly identify the subjects offered at external institutions. Use those categories to identify which institutions offer courses in those subjects. For example, perhaps one of the entrance requirements at your institution is four years of high school English. Various high schools offer classes titled 17th Century English Literature, Mystery Writers of America, and A Journey through Time with Shakespeare. When these classes appear on a student’s transcript they do not readily translate as English courses. If you create a broad external subject of *English,* you can assign these courses to it to help track your institution’s English requirements.

When tracking information regarding external institutions for a prospect, applicant, or student, it is important to know the specific term to which that information is related. For example, when you enter external transcript or external transfer credit information, you should record the term to which the transcript information pertains. Because external institutions use various term structures, possible terms should be available to help identify that particular organization’s term structure. Some external terms are redefined translate values. Review these values to verify that they meet your institution’s needs; create others if necessary. You can also set up how you want the system to convert external terms to your term structure.

Use the School Course Classification page to record the specific course offerings for each subject area.

See Also

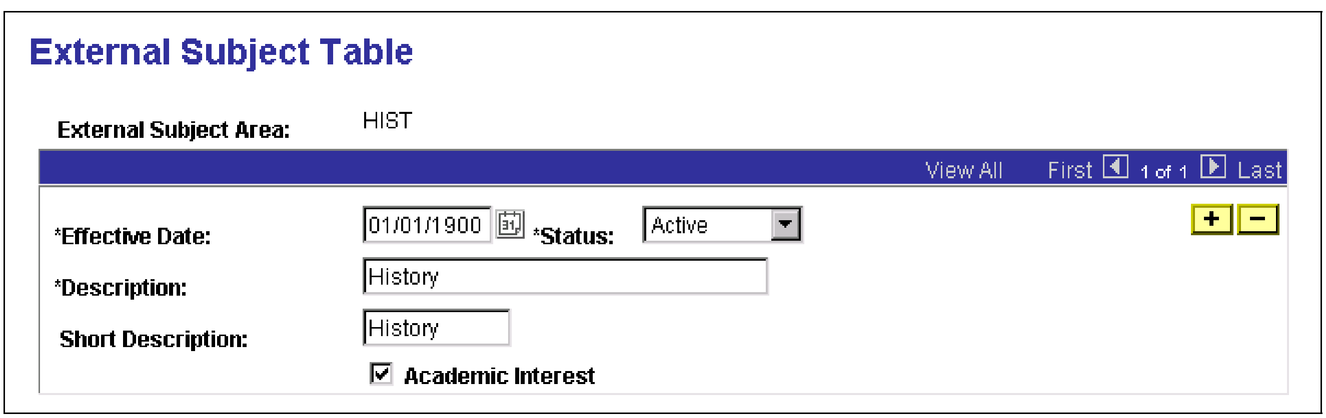
PeopleSoft 8 SP1 Student Records PeopleBook, “Processing Transfer Credit”

Pages Used to Set Up External Subjects, Terms, and Courses

Page Name	Object Name	Navigation	Usage
External Subject Table	EXT_SUBJECT_TBL	• Build Community, Organization Data, Setup, External Subject Table, External Subject Table • Design Student Administration, Define Student Administration, Setup, External Subject Table, External Subject Table • Manage Student Records, Process Transfer Credit, Setup, External Subject Table, External Subject Table	Define broad categories of the subjects offered at external organizations.
External Term	EXTERNAL_TRM_TABLE	• Build Community, Organization Data, Setup, External Term, External Term • Design Student Administration, Define Student Administration, Setup, External Term Table, External Term • Manage Student Records, Process Transfer Credit, Setup, External Term Table, External Term	Define or review possible external terms sessions for external organizations.

Defining External Subject Categories

Access the External Subject Table page.



External Subject Table page

Academic Interest Select to indicate that the system should use this code as an academic interest code as well as an external subject code.

Academic interests are external subject areas in which a prospect or applicant has expressed interest that may not be offered by your program. If you want to record those interests for recruiting and analysis purposes, define them here.

When you enter external subjects for a prospect or applicant on the Education page, all codes defined in this table are available.

When you enter academic interests for a prospect or applicant on the Academic Interests page, only the codes flagged as academic interests on this page are available.

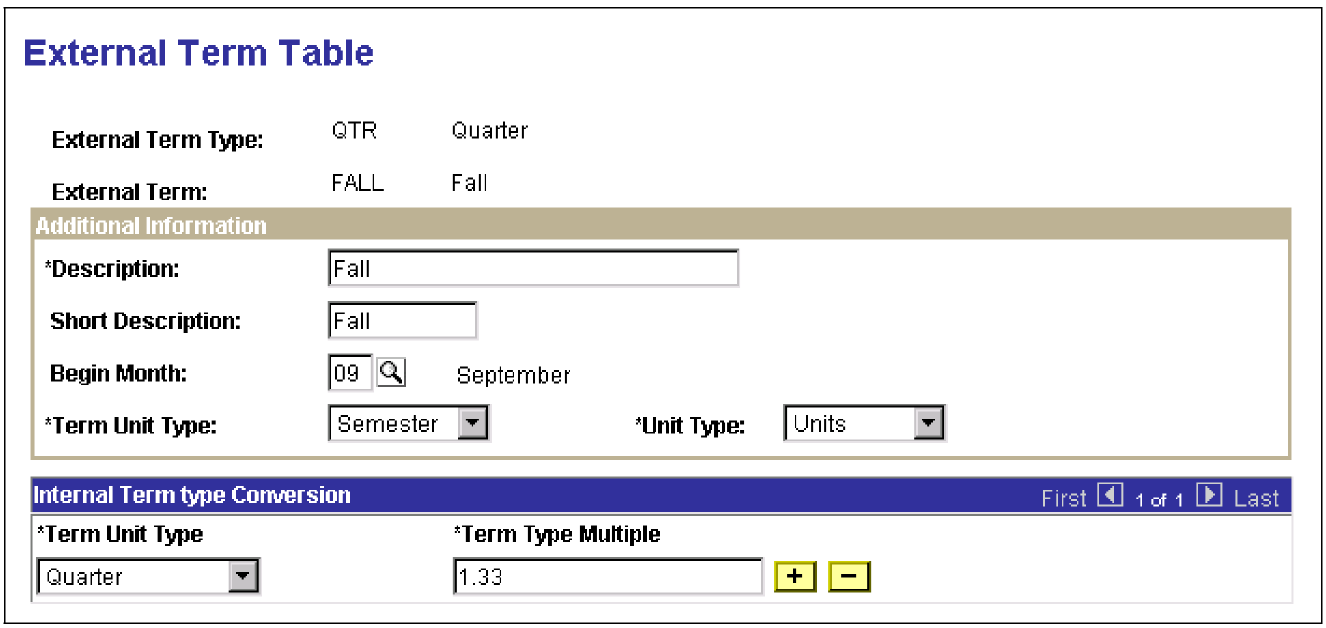
See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, “Tracking Supporting Prospect and Applicant Information”

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, “Tracking External Education Information”

Defining External Term Sessions

Access the External Term page.



External Term Table page

Begin Month

The month in which the external term begins.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Term Unit Type

The type of internal term unit that most closely correlates to this external term type.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Unit Type A credit or term type that further describes the correlation of this external term to your institution's term unit type.

PeopleSoft Recruiting and Admissions uses this field for information only. For example, they might want to describe the external term as having a *Quarter* term unit type with a *No Credit* unit type value.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Term Unit Type The external term unit type that you want the system to convert to an equivalent of the internal term unit

Term Type Multiple The factor by which the system should multiply the external term unit type to convert it to an equivalent of the specified internal term unit type.

For example, the external term unit type of *Quarter* multiplied by *1.33* is the equivalent of your internal *Semester* term unit type. The system provides this conversion when calculating transfer credit for a manually assigned equivalent course.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Preparing for the Course Catalog and Schedule of Classes,” Setting Up Unit Conversions

CHAPTER 12

Setting Up Administrative Functions

This chapter provides an overview of administrative functions and discusses how to:

- Review administrative function codes.
- Determine variable data fields.

Understanding Administrative Functions

Administrative functions identify the variable data or key fields associated with specific functions in the higher education environment. Throughout your system, when you select a function, the associated fields or data for that function become available. With this feature, PeopleSoft helps you ensure consistency between all records within a similar functional area across your institution. Administrative functions are also especially useful for extracting relevant data for generating letters and other communications within a specific functional area.

Warning! PeopleSoft delivers predefined administrative functions on the Administrative Functions Table. You should *NOT* modify the delivered administrative functions. You can add additional administrative functions, however extensive system configuration is required to do so.

The following table lists all of the administrative functions and variable data fields delivered in your system.

Code	Administrative Function	Variable Data Fields
ADMA	Admissions [Application Level]	• Academic Career • Student Career Number • Application Number • Application Program Number
ADMP	Admissions Program [Program Level]	• Academic Career • Student Career Number • Application Number • Application Program Number

Code	Administrative Function	Variable Data Fields
AVAK	Advancement Acknowledgements	• Designation Code • Gift Number • Initiative Code • Recognition Type • Session Number
AVIN	Advancement Initiatives	• Audience Code • Audience Type • Initiative Code
AVMB	Advancement Membership Benefits	• Member Payment Number • Standard Benefit
AVMS	Advancement Membership	• Membership Number • Membership Organization Code
AWRD	Awarding	• Academic Career • Aid Year • Item Type
BDGT	Budget Maintenance	• Academic Career • Aid year • Effective Date (FINA) • Term
EVNT	Event	• Event Number • Meeting Number (optional)
FINA	Financial Aid	Aid Year
GEN	General	None
ISIR	ISIR Corrections	• Aid Year • Effective Date (FINA) • Effective Sequence (FINA)

Code	Administrative Function	Variable Data Fields
LOAN	Loan	• Aid Year • Loan Type Code • Application Sequence
PROP	Prospect Program	• Academic Career • Academic Program • Recruiting Center
PROS	Prospect	Academic Career
PSSV	Prospect Self Service	Academic Career
RECR	Recruiters	Academic Career
RSTR	Restricted Aid	• Aid year • Restricted Aid ID
SFAC	Student Financials Account	• Business Unit • Account Number • Account Term
SFBI	Student Financials Billing	• Business Unit • Invoice ID
SFCO	Student Financials Collections	• Business Unit • Collection ID
SFGR	Student Financials Groups	• Business Unit • Group ID
SFIT	Student Financials Item Lines	• Business Unit • Item Number • Line Sequence Number
SFPA	Student Financials Payments	• Business Unit • Payment ID Number

Code	Administrative Function	Variable Data Fields
SFPR	Student Financials Promise	Checklist Date Time
SFRC	Student Financials Receipt	• Business Unit • Cashier's Office • Receipt Number
SFRF	Student Financials Refund	• Business Unit • Refund Number
SFTP	Student Financials Contracts	• Business Unit • Contract Number
SPRG	Student Program	• Academic Career • Career Number
STRM	Student Term	• Academic Career • Academic Term

Reviewing Administrative Functions

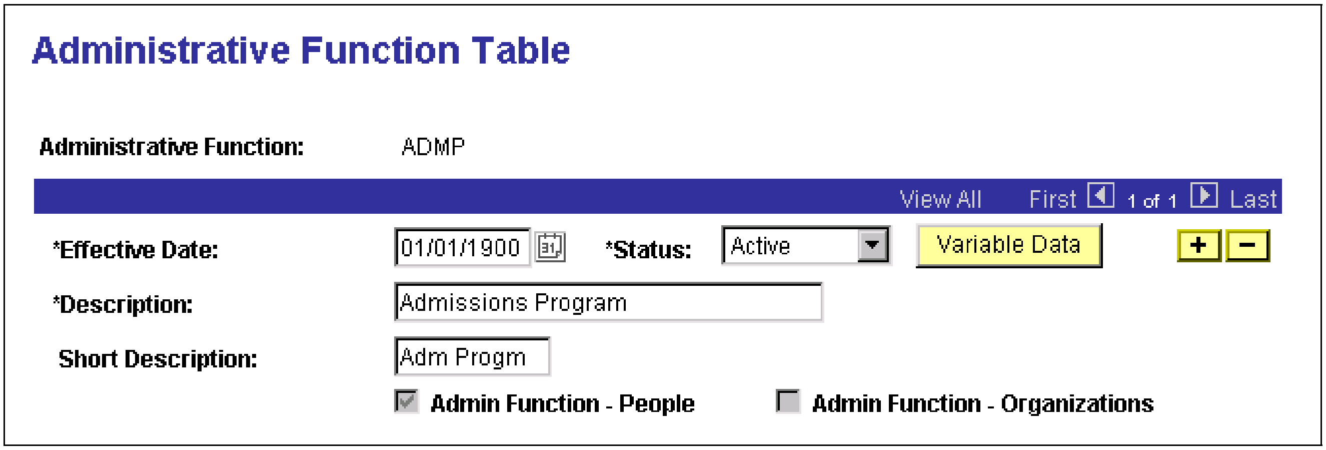
This section discusses how to review administrative function codes.

Page Used to Review Administrative Functions

Page Name	Object Name	Navigation	Usage
Administrative Function Table	ADM_FUNCTION_TABLE	Design Student Administration, Define Student Administration, Setup, Administrative Function Table, Administrative Function Table	Reviewing administrative functions.

Reviewing Administrative Function Codes

Access the Administrative Function Table page.



Administrative Function Table page

Variable Data Click to access the Administrative Function Field Usage page where you can view a list of all the variable data fields associated with this function.

Admin Function – People or **Admin Function – Organizations** The system selects to indicate that the function relates to either individuals or to organizations in your database.

Determining Variable Data Fields

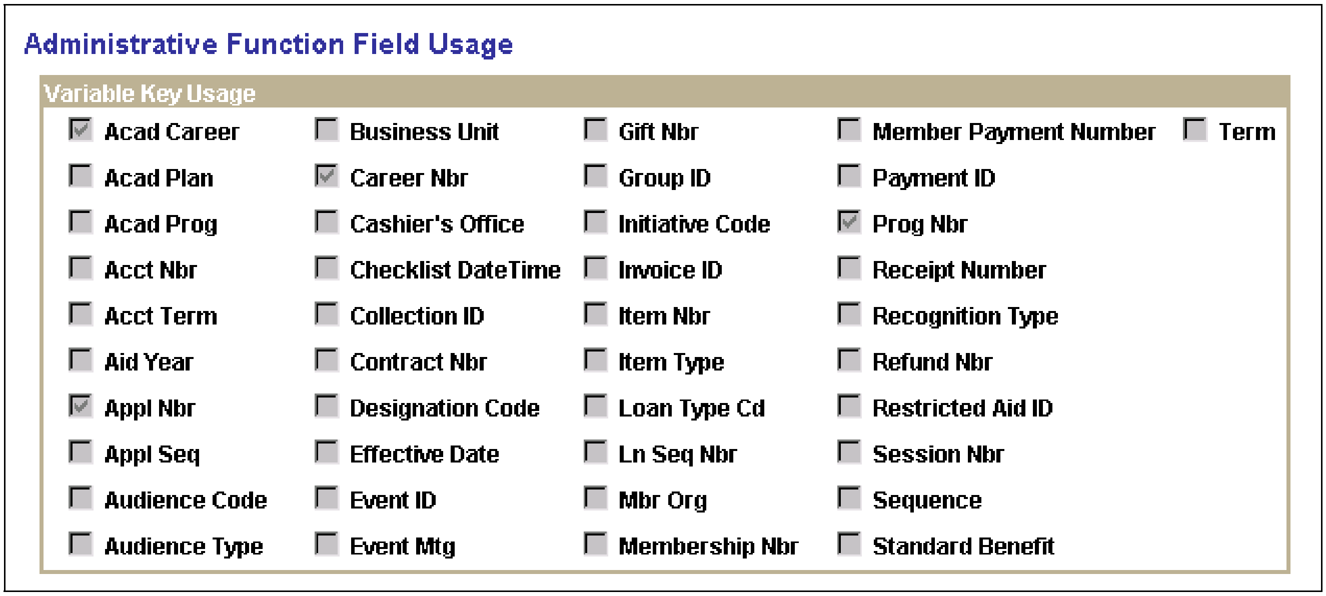
This section discusses how to determine the data fields associated with a function.

Page Used to Determine Variable Data Fields

Page Name	Object Name	Navigation	Usage
Administrative Function Field Usage	ADM_FUNCTION_SP	Click the Variable Data button on the Administrative Functions Table page.	Viewing fields associated with an administrative function.

Viewing Data Fields Associated With a Function

Access the Administrative Function Field Usage page.



Administrative Function Field Usage page

A selected check box indicates that the item is variable data for that administrative function. Administrative functions are shipped with their variable data preassigned. Any modification to these selections could require substantial programming effort.

CHAPTER 13

Setting Up Communications

This chapter provides and overview of setting up checklists and discusses how to:

- Define or review standard letter codes.
- Define communication contexts.
- Define communication categories.
- Set up communication 3C groups.
- Create communication speed keys.

See Also

Chapter 26, "Managing Communications," Understanding Letter Generation, page 274

Prerequisites

Before designing your communication structure, do the following to analyze your functional areas and institutional needs for tracking and scheduling communications.

- Understand the use of administrative functions and 3C groups and make sure they are set up properly.
- Identify all incoming, outgoing, and in-person contacts to track.
- Identify the various types of contact (phone, letter, email, fax) that your institution wants to track.

See Also

Chapter 23, "Understanding the 3Cs—Communications, Checklists, and Comments," page 239

Chapter 12, "Setting Up Administrative Functions," page 105

Chapter 26, "Managing Communications," page 269

Understanding Communications Setup

You must design your communications structure to identify the who, what, when, and how of each communication before you can assign communications to individuals, organizations, or groups of individuals. You must also review the standard letters and communication templates to determine if these serve your institution's needs or if you must create new or additional letter codes and templates.

You can set up standard letter codes to link extracted letter data to your text editor or JetForm letter templates for the purpose of generating letters. You can also use the codes to group letters to send together as enclosures. PeopleSoft delivers sample letter templates in Microsoft Word. If your institution uses Microsoft Word, you can choose to use the sample Word templates as they are, modify them, or create your own.

Communication contexts are broad groupings that indicate the type of communication and how it was sent or received. You can specify more than one method of communication for each context. For example, if students can contact your institution by letter, email, or phone to confirm admission acceptance, you might create an Admissions Acceptance communication context that includes all three methods. You must create communication contexts and then group them into communication categories to set up communication management.

A communication category is a broad grouping of communication contexts that generally indicates why a communication was sent or received. For example, you might create a communication category, called Admissions, that includes the following communication contexts: application received, admission acceptance, admission decline, admission deferral, frosh admit, frosh deny, and so on, or you might decide to create much more detailed communication categories such as Frosh Recruit, Frosh Admission, Graduate Recruit, and Graduate Admission.

You can create communications 3C groups and use them to grant groups of users inquiry or update security access to categories of communications in your database.

Comm Keys (communication speed keys) enable you to create a shorthand method of specifying common communication data. With the five controls in place—standard letter codes, communication methods, communication directions, communication contexts, and communication categories—you can set up Comm Keys to combine these controls with a number of defaults into one shortcut page control.

Note. Comm Keys are required if you are going to use the 3C engine or mass change function to assign communications to individuals or organizations.

See Also

Chapter 26, “Managing Communications,” Understanding Letter Generation, page 274

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Securing Campus Community Security and Copying User Security,” Setting Up 3C Group Security

Pages Used to Set Up Communications

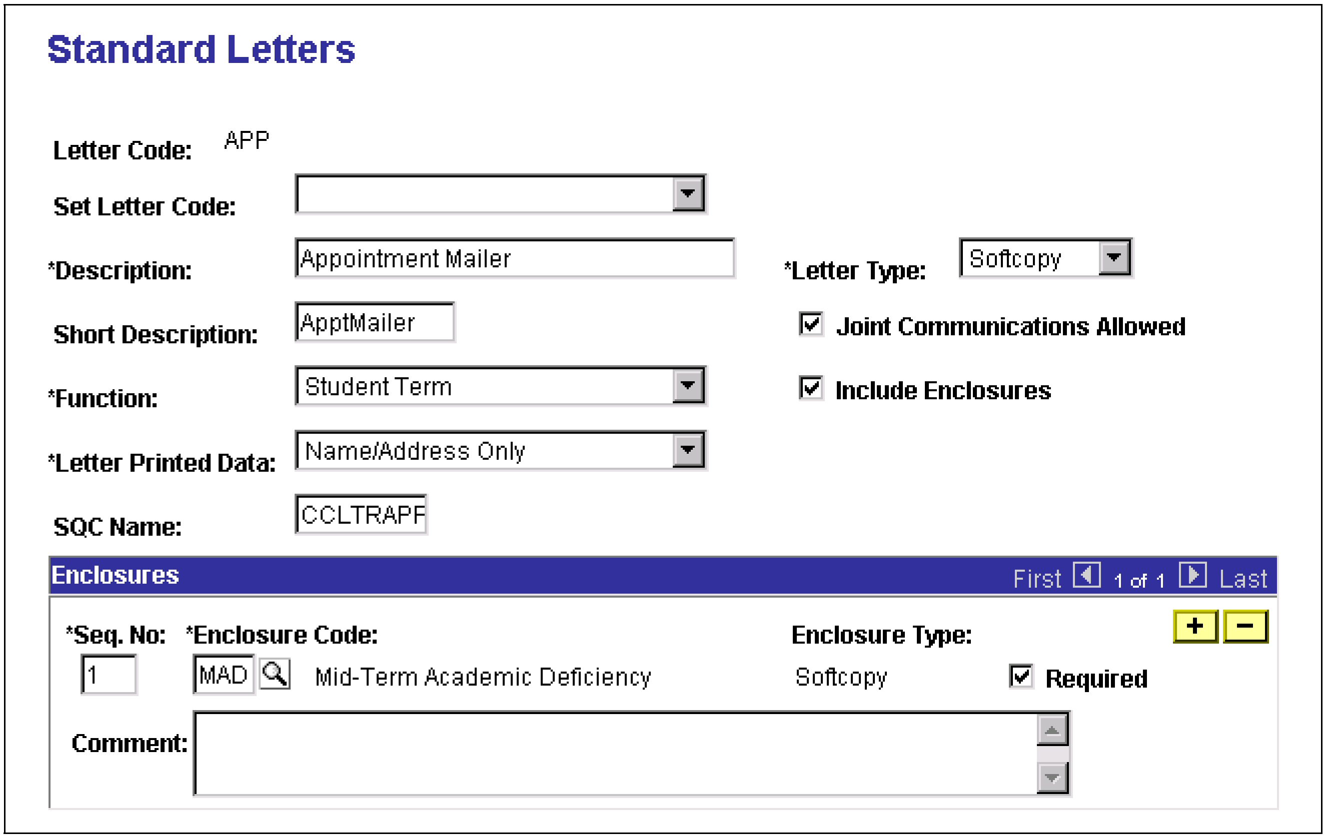
Page Name	Object Name	Navigation	Usage
Standard Letters	STANDARD_LTR_TABLE	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Setup, Standard Letter Table, Standard Letter Table • Design Student Administration, Design Financial Aid2, Setup R-Z, Standard Letter Table, Standard Letter Table • Design Student Administration, Define Contributor Relations, Setup, Standard Letter Table, Standard Letter Table • Develop Workforce, Administer Training (GBL), Setup, Standard Letter Table, Standard Letter Table	Review or define the types of letters that your institution wants to generate, assigning a letter code and administrative function to each. You can also group letters here to create enclosures.
Communication Context	COMM_CTXT_TABLE	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Setup, Communication Context Table, Communication Context Table • Manage Contributor Relations, Manage People, Setup, Communication Context Table, Communication Context Table • Manage Student Financials, Collect Receivables, Setup, Communication Context Table, Communication Context Table	Create and define communication contexts.

Page Name	Object Name	Navigation	Usage
Communication Categories	COMM_CATG_TABLE	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Setup, Communication Category Table, Communication Category Table • Manage Contributor Relations, Manage People, Setup, Communication Category Table, Communication Category Table • Manage Student Financials, Collect Receivables, Setup, Communication Category Table, Communication Category Table	Define categories of communication contexts to indicate why a communication was sent or received.
Communication 3C Groups	COMM_GRP_3C_TABLE	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Setup, Communication 3C Groups, Communication 3C Groups • Manage Contributor Relations, Manage People, Setup, Communication 3C Groups, Communication 3C Groups • Manage Student Financials, Collect Receivables, Setup, Communication 3C Groups, Communication 3C Groups	Assign groups of users to a communication 3C security access group.

Page Name	Object Name	Navigation	Usage
Communication Speed Keys	COMM_SPKDEY_TABLE	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Setup, Communication Speed Key Table, Communication Speed Key Table • Manage Contributor Relations, Enter Commitments, Setup, Communication Comm Key Table, Communication Speed Key Table • Manage Contributor Relations, Manage People, Setup, Communication Comm Key Table, Communication Speed Key Table	Create Comm Keys for specifying common communication data.

Defining or Reviewing Standard Letter Codes

Access the Standard Letters page to review or define standard letter codes.



Standard Letters page

Note. Before modifying the following PeopleSoft HRMS letter codes and Word templates, read the PeopleSoft HRMS documentation regarding generating form letters to determine if your modifications are permitted: *ACQ, ANO, CAN, CBR, CTR, DEP, DIV, IR, IS1, IS2, IS3, LAT, OF1, OF2, REV,* and *RSC.* Also, you should become familiar with the scope of the PeopleSoft Financial Aid *FAN* code or template before modifying it.

See *PeopleSoft Application Fundamentals for HRMS PeopleBook*

See *PeopleSoft 8 SP1 Financial Aid PeopleBook*, “Awarding and Packaging Students,” Creating the FAN Extract File and Producing the FAN Letter.

Set Letter Code

The category (*Admit Letters, Inquiry Response Letters, Recruitment Letters,* and so on) that best describes the group of letters that includes this letter code. This field is optional and for information only.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Function

The function, from the Administrative Function Table page, that identifies the variable data extracted for communications associated with this letter code.

For example, if you are sending a letter to a freshman applicant under the function of *Student Term,* the variable data of Academic Career and Term will be extracted for use in the communication. The variable data are set up in the Administrative Function Table and cannot be modified.

Letter Printed Data

Controls the data shown on the Communication Letter Data page. (When you run the letter generation data extract process, a huge amount of data is extracted. The extracted data that you specify here are listed on the Letter Data page for your view.) Check PeopleSoft Customer Connection for additional information about communication section headers and the data associated with them.

All: All of the communication section headers and their data should be included. If you select this, note that the table will be very large and could take significant time to load.

Name/Address Only: Only the name and address communication section headers and data should be included.

None: None of the communication section headers and data should be included.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

SQC Name

The name of the unique SQC, if any, required to generate additional variable data for communications associated with this letter code.

The letter generation process uses the unique SQC to extract data into a letter template. You must modify the letter generation SQR to look for any SQCs that you specify here.

Warning! Do *NOT* modify the CCLTRWOL.SQC. The User Profiles Management process requires this SQC. Any modifications to this could require substantial programming effort. For information about the SQCs delivered with your system, see PeopleSoft Customer Connection.

Letter Type

The output form *(Hardcopy* or *Softcopy)* for this letter.

Hardcopy: Does not allow the system to extract data or merge into a softcopy template. Indicates preprinted items, such as brochures or pamphlets.

Softcopy: Allows the system to extract data and merge into a softcopy template, which you can then print.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Joint Communication Allowed

When selected, indicates that this letter can be addressed jointly to two people at the same address, provided that they have a relationship, defined in your database, that permits joint communications.

The sample Word template CCLTRJNT.doc is delivered with your system for use with joint communications.

See Chapter 26, “Managing Communications,” page 269.

Include Enclosures

When selected, indicates that other letters need to be grouped and sent with this letter.

Enclosures

This scroll area is available only when the Include Enclosures check box is selected. You can group a maximum of ten letter codes as enclosures here. Letter codes from which to choose must already exist on the Standard Letters page.

Note. If you are creating your own letter templates, you must set up all of your letter codes first and then come back to assign enclosures.

Sequence Number The number of this enclosure in the list of enclosures for this letter. When you run the letter generation data extract process, the process lists, in the order identified here, up to ten enclosures on the main letter in the order identified here.

The system automatically enters the next sequential number for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures.

Enclosure Code The code for the letter to include as an enclosure for this letter.

The letter codes available are those associated with the same function that you select for the main letter code. For example, if you select the function *ADMA* for the main letter code, the Enclosure Code prompt list displays the letter codes that exist and are associated with the function ADMA on the Standard Letters page.

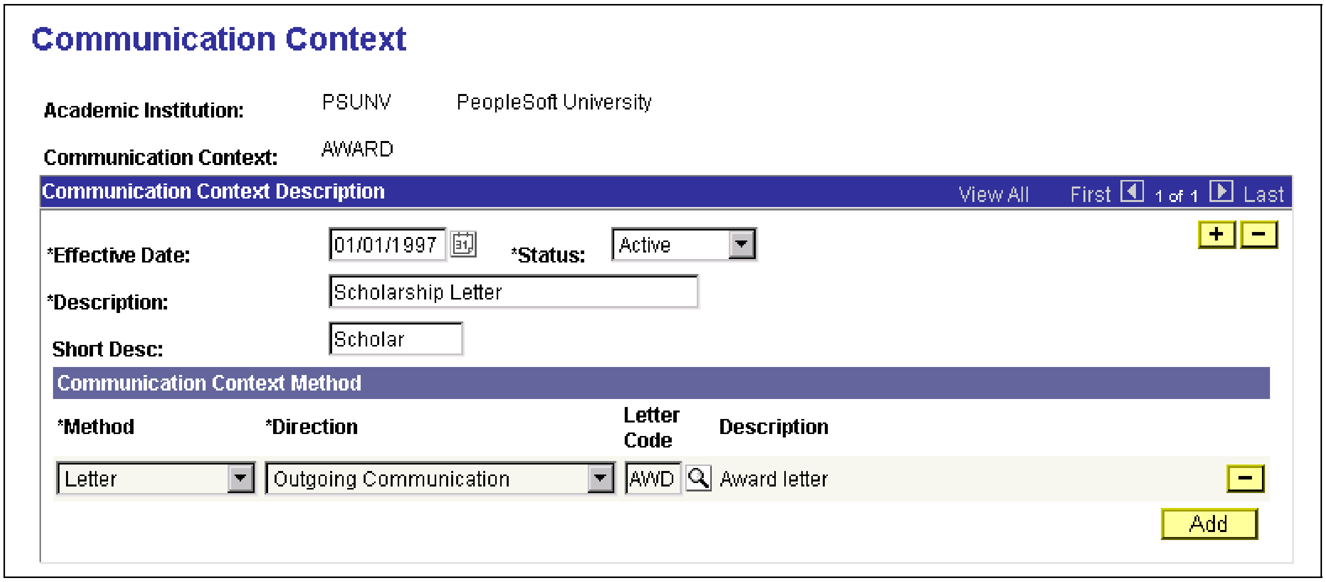
Enclosure Type The system displays the type of output associated with the selected enclosure letter code.

Required Select to indicate that the specific enclosure must accompany the main letter at all times. Administrative users can remove nonrequired enclosures when they assign the communication to an individual on the Communication Management 1 page.

Comment Enter comments to further identify or describe this enclosure. Enclosure comments are for information purposes only. They will not be printed in the communication.

Defining Communication Contexts

Access the Communication Context page.



Communication Context page

Communication Context Method

Method

Specify the form of this communication (for example, *Letter, Email,* or *Phone Call*). A communication context can have multiple methods. For example, for the context of Award, you might send a letter and also make a phone call.

Values for this field are delivered with your system as translate values. The *Letter* method is required for generating letters; do not modify it. You can, however, can modify any of the other method translate values.

Direction

Specify the direction of this communication *(In Person, Incoming Communication,* or *Outgoing Communication).*

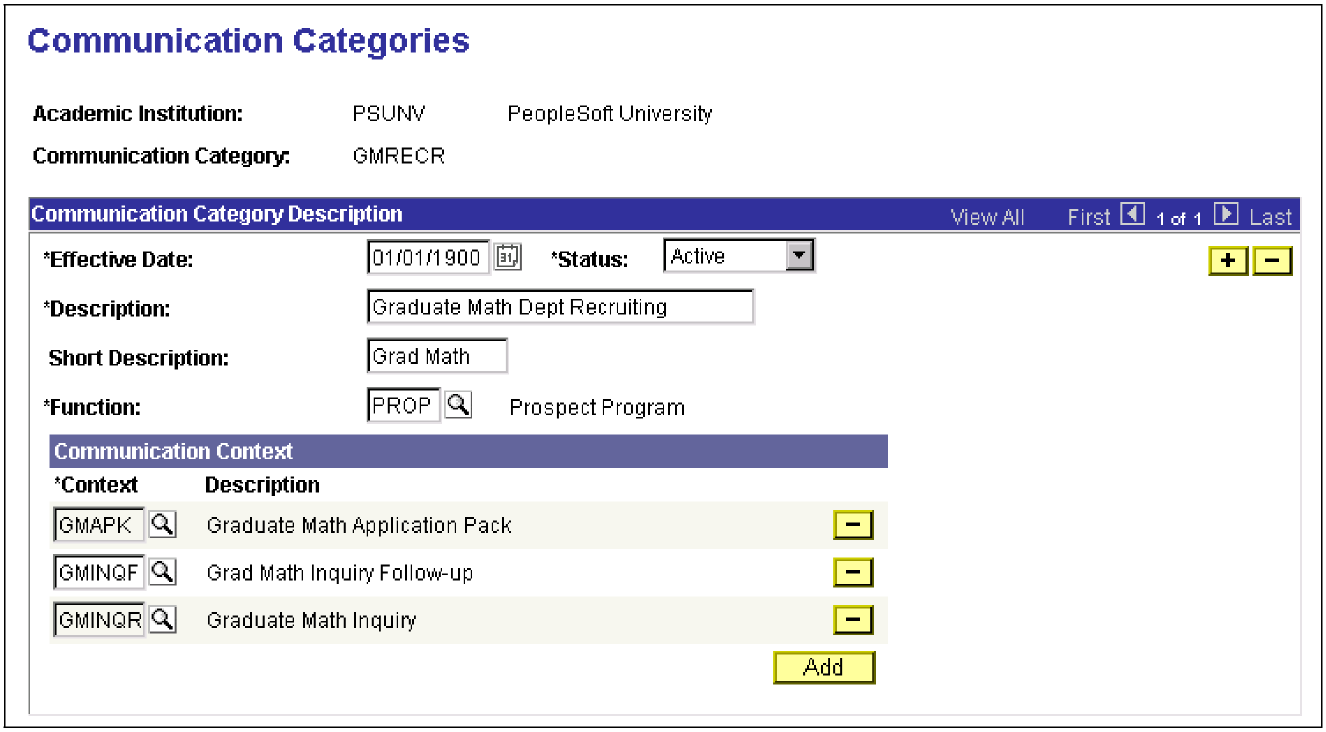
Values for this field are delivered with your system as translate values. Except for the direction of *Outgoing Communication,* you can modify these translate values.

Letter Code

Select the code, from the Standard Letters page, for this communication. The code specifies the variable data associated with this communication. The Letter Code field is available only when the direction of *Outgoing Communication* is selected.

Defining Communication Categories

Access the Communication Categories page.



Communication Categories page

Note. Communication categories are assigned to communication 3C groups on the Communications 3C Groups page for the purpose of limiting access to the communications associated with those categories. Therefore, make your communication categories specific so that you have more flexibility to determine which users have access to which communications.

Communication Category Description

Function The functional area, from the Administrative Functions page, to include in this category. The function determines the variable data that will be associated with communications in this category.

Communication Context

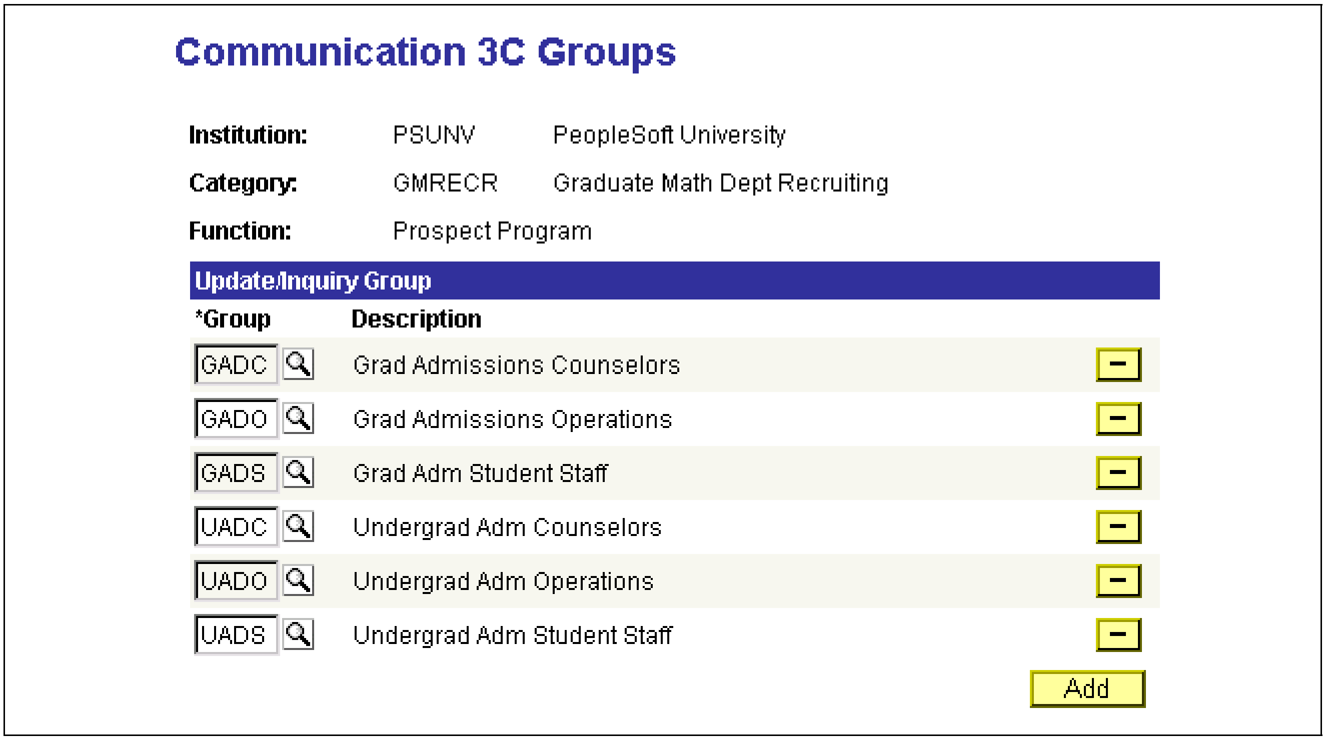
Context The context, from the Communication Contexts page, to include in this category.

Description The system displays the long description of the context you select.

Warning! All contexts from the Communication Context page are available, whether or not they include a letter code associated with the same function as the communication category. For example, if you select a context that has a letter code associated with the ADMA function and a category associated with the PROP function, the letter code will not be available as a valid choice when you assign the communication on the Communication Management page.

Defining Communication 3C Groups

Access the Communication 3C Groups page.



Communication 3C Groups page

3C Update/Inquiry Group

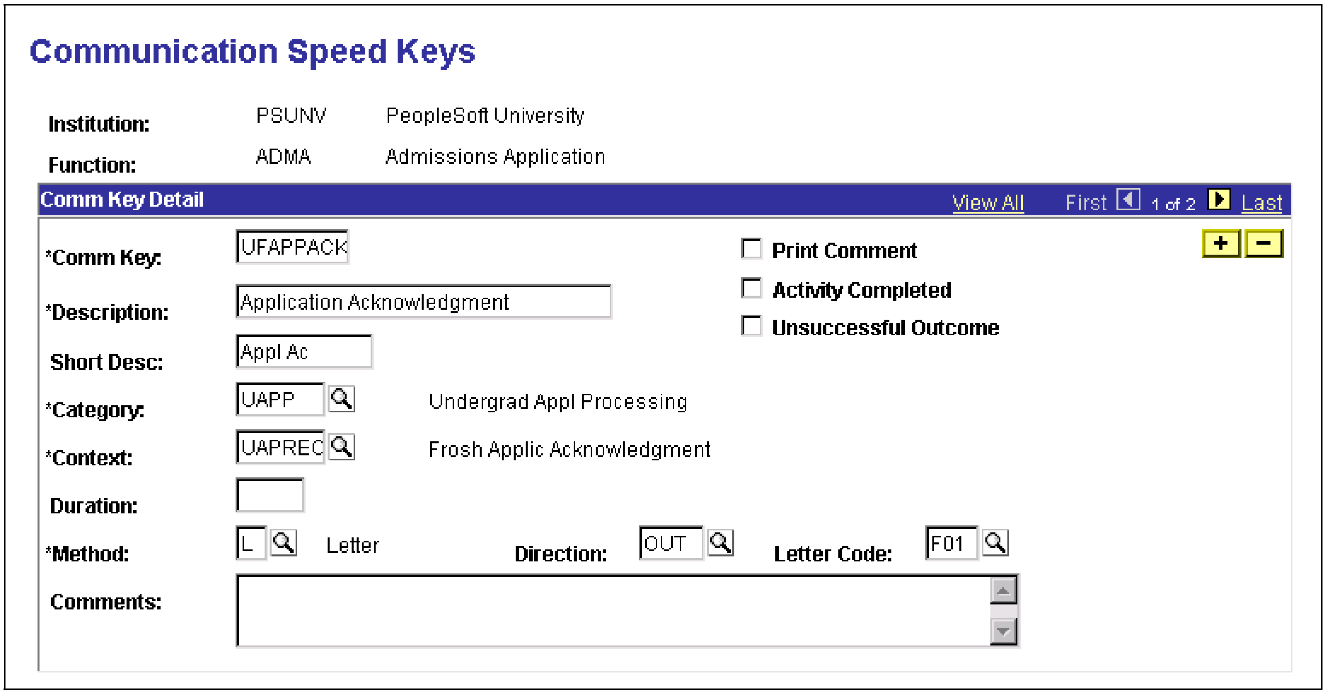
Group	Select the group, from the 3C Groups page, that should have access to this communication category.
Description	The system displays the long description of the selected group.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Setting User Defaults,” Selecting the Type of 3C Group Access

Defining Communication Speed Keys

Access the Communication Speed Keys page.



Communication Speed Keys page

Comm Key Enter the name of the communication speed key to represent this set of communication elements.

Category Select the communication category to associate with this communication speed key.

Context Select the communication context to associate with this communication speed key.

Duration Enter the average duration, expressed in minutes, for the type of communication you are associating with this communication speed key. (Optional)

Duration is usually used to specify the length of time for in-person communications, for example, the duration of a phone call.

Method Specify the typical method of the communication you are associating with this communication speed key. The method of *Letter* is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the method of *Letter,* you can modify these translate values.

Direction Specify the direction of the communication you are associating with this communication speed key. The direction of *Outgoing Communication* is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the direction of *Outgoing Communication,* you can modify these translate values.

Letter Code	Specify the code, from the Standard Letters page, for the communication you are associating with this communication speed key.
Comments	Enter comments to further describe or identify the communication to associate with this communication speed key.
Print Comment	Select to include or print the comments on the Comments pages in the communication you are associating with this communication speed key.
Activity Completed	Select to indicate that the communication speed key should include the status of *Complete.* This option is useful when data for a communication is typically entered after the activity is completed. For example, if the communication is an incoming phone call or an incoming letter, when you report it in the system, the communication is already complete.
Unsuccessful Outcome	Select to indicate that the communication speed key should include the status of *Unsuccessful.* If you were to hold a phone-a-thon, for example, you might want to record each call to track your success rate. You could create two communication speed keys: one for successful phone calls, and one for unsuccessful phone calls.

Note. Before a user can use the communication speed keys defined here, the communication speed key codes must be assigned to the individual.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Setting User Defaults,” Setting Defaults for Communication Keys

Chapter 14

Setting Up Comments

This chapter provides an overview of comment setup and discusses how to:

- Setting up comment categories.
- Associate categories with the 3C groups.
- View comments reports.

Understanding Comment Setup

To attach comments to records, you must first create comment categories and associate them with 3C groups to define who, at your institution, has the security access to write, review, or change comments.

Prerequisites

Before defining comment categories and associating them with 3C groups, you must understand and set up administrative codes, 3C group security, and have assigned individuals to specific 3C groups. You should also be familiar with the 3C engine.

See Also

Chapter 12, "Setting Up Administrative Functions," page 105

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Campus Community Security and Copying User Security," Setting Up 3C Group Security

Chapter 24, "Using the 3C Engine," page 241

Common Elements Used in This Chapter

Administrative Function — The code for the administrative area with which this comment category is associated.

3C Group — The comment group to which a user has security access.

Setting Up Comment Categories

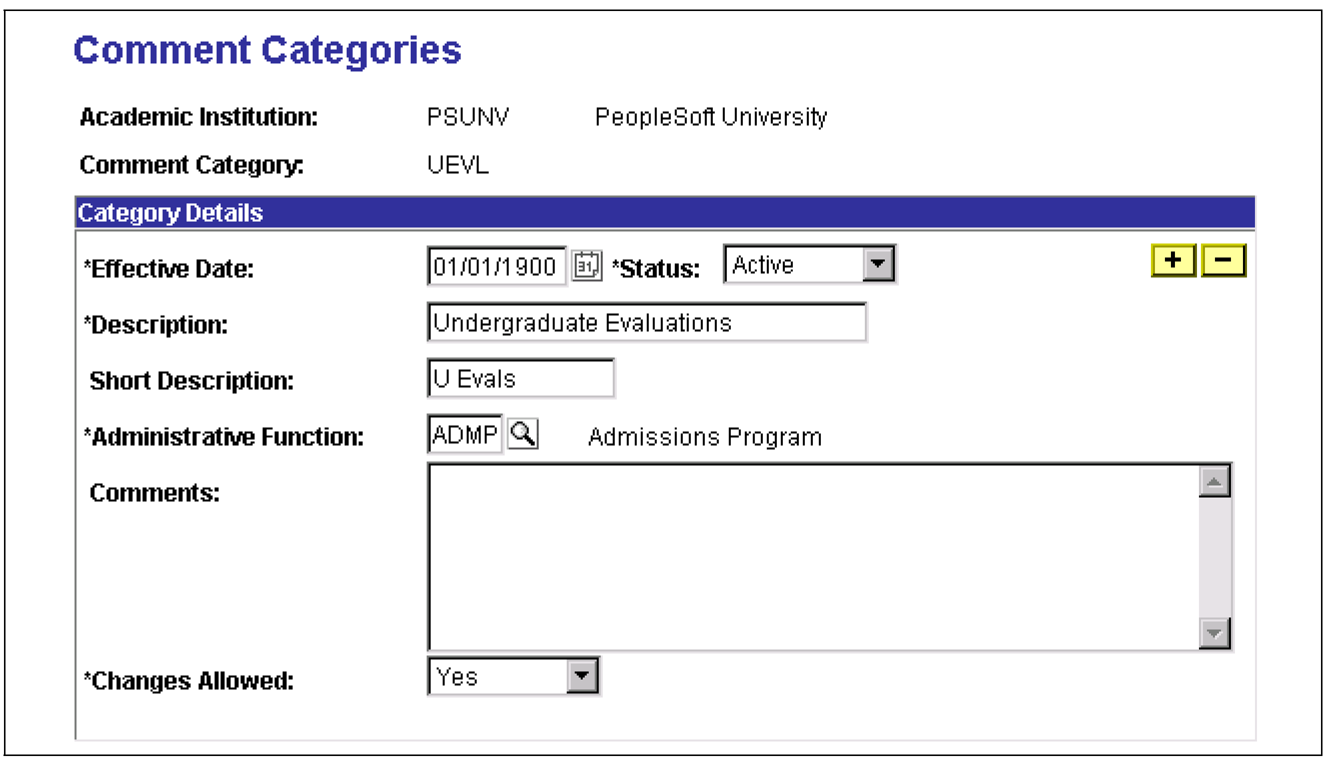
This section discusses how to define comment category codes.

Page Used to Set Up Comments

Page Name	Object Name	Navigation	Usage
Comment Categories	CMNT_CATG_TABLE	• Build Community, Comments, Setup, Comment Category Table, Comment Category Table • Design Student Administration, Define Contributor Relations, Setup, Comment Category Table, Comment Category Table • Manage Student Financials, Collect Receivables, Setup, Comment Category Table, Comment Category Table	Define categories that enable you to group comments for similar purposes.

Defining Comment Category Codes

Access the Comment Categories page.



Comment Categories page

Administrative Function Select the code, from the Administrative Functions page, for the administrative area with which this comment category is associated.

Comments Enter the default comment to use when this comment category is assigned to an individual.

Changes Allowed Indicate whether users should be permitted to change the default comment associated with this comment category. The default value is *Yes.* You can override this value.

Append: Indicates that users can add to the default comment, but cannot change or edit it.

No: Indicates that users cannot change, edit, or add to the default comment.

Setting Up Comment 3C Group Security

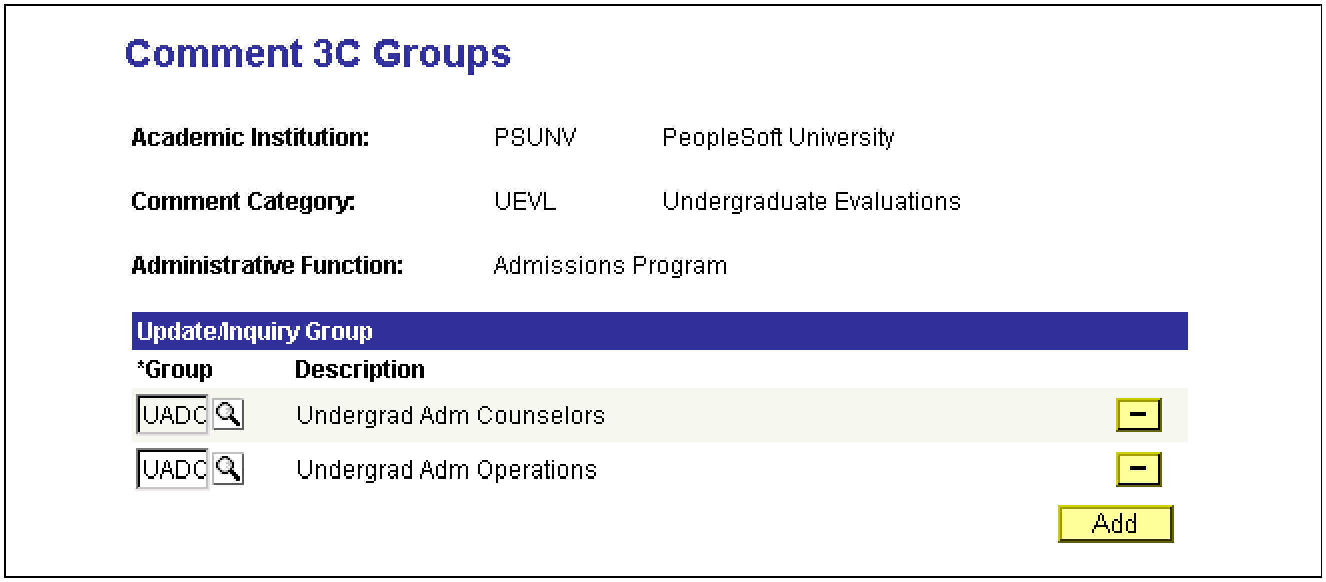
This section discusses how to create a comment 3C group.

Page Used to Assign Comment 3C Group Security

Page Name	Object Name	Navigation	Usage
Comment 3C Groups	CMNT_GRP_3C_TABLE	• Build Community, Comments, Setup, Comment 3C Groups, Comment 3C Groups • Design Student Administration, Define Contributor Relations, Setup, Comment 3C Groups, Comment 3C Groups • Manage Student Financials, Collect Receivables, Setup, Comment 3C Groups, Comment 3C Groups	Create comment 3C groups to grant security access to comments in your database.

Creating a Comment 3C Group

Access the Comment 3C Groups page.



Comment 3C Groups

3C Update/Inquiry Group Area

Use the fields in this transactional area to list the 3C groups that have a business need to view or update comments in this category.

Note. Users can access only those comments associated with the comment category to which you grant them access by way of comment 3C groups on the 3C Groups page.

CHAPTER 15

Setting Up Checklists

This chapter provides and overview of setting up checklists. It describes how to:

- Define checklist items.
- Associate checklist items with functions.
- Define checklist tracking groups.
- Create checklist templates.
- Set up checklist 3C groups.

See Also

Chapter 23, "Understanding the 3Cs—Communications, Checklists, and Comments," page 239

Chapter 24, "Using the 3C Engine," page 241

Chapter 28, "Managing Checklists," page 323

Understanding Checklist Setup

To create checklists, you must set up checklist items. You can assign a responsible person, a status, and a due date to each checklist item. You can then relate multiple checklist items to a specific checklist and assign a due date for the overall checklist. You can also associate checklist items with an administrative function and use that function to enter all or some of the items as a subset of items on a larger, more comprehensive checklist with its own overall due date. In addition, you can combine several checklists into one monitoring unit called a tracking group.

You can make the checklist items as general or as specific as you want. For example, checklist items might include an admission application that a student needs to submit, a letter that a member of your staff needs to write, or a phone call that a staff member needs to make.

You can associate a checklist item with multiple administrative functions. However, when you use an administrative function to create a checklist, you can enter only those checklist items associated with that administrative function.

You can combine several checklists within the same administrative function into one unit for fast, organized monitoring.

For example, if you were to create a checklist of items typically required for an admissions application, you might begin by creating a checklist item for receiving the individual's ACT or SAT 1 test scores. You might also set checklist item codes for the application fee, references checked, a meeting arranged with a mentor, and career and placement discussion held.

To set up the checklist item code for receiving ACT or SAT 1 test scores:

1. Select Build Community, Checklists, Setup, Checklist Item Table.
2. Enter a checklist item code, for this example, ACTSAT.
3. Enter a description to identify the checklist item.

   In this case, ACT or SAT 1 Test Scores.
4. Enter a short description.

   If you do not enter a short description, the system enters one based on the description.
5. Enter a long description to provide more information about the checklist item or to enter a comment.

   If you use this checklist item as part of generating a letter, the data in the long description is included in the letter generation output data. You can print it in the letter or not.

   See Chapter 26, "Managing Communications," page 269.

After you create the checklist item code for the offer letter, you can continue creating checklist item codes for each item that you want on your checklist. When you are finished setting up checklist items, you can set up checklist function items.

You can choose to associate a set of checklist items with a particular administrative function. You can then use that administrative function to indicate a subset of checklist items that you want to include in a larger checklist.

For example, you could associate a set of checklist items with the function of Admissions Application. These checklist items might include the ACT or SAT 1 test scores, application fee, references checked, a meeting arranged with a mentor, and career and placement discussion held.

To associate the ACT or SAT 1 test scores checklist item with the administrative function of Admissions Application:

1. Select Build Community, Checklists, Setup, Checklist Function Item Table.
2. Enter the administrative function, for this example, ADMA.
3. Enter the item code of the checklist item that you want to associate, in this case, ACT/SAT.

When you have associated this checklist item with the appropriate administrative function, you can continue associating additional checklist items. When you have set up checklist function items, you can set up tracking groups.

A tracking group provides a logical connection between the checklists attached to an individual. For example, you may have several checklists for the same student in the undergraduate applications function, but only some of those checklists are related to the student's loan requirements. You might want to monitor the status of this student's loan documents to determine when his loan document requirements are complete. When you create the checklist and assign a checklist code, you could also assign the checklist to a loan documents tracking group.

Users can access checklists only in the checklist categories to which you grant them 3C group security access.

Prerequisites

Before defining checklist items and associating them with functions, set up or become familiar with administrative functions. Before using communication speed keys to create a checklist template, set up communication speed keys in your system.

See Also

Chapter 12, "Setting Up Administrative Functions," page 105

Chapter 13, "Setting Up Communications," Defining Communication Speed Keys, page 121

Setting Up Checklist Items

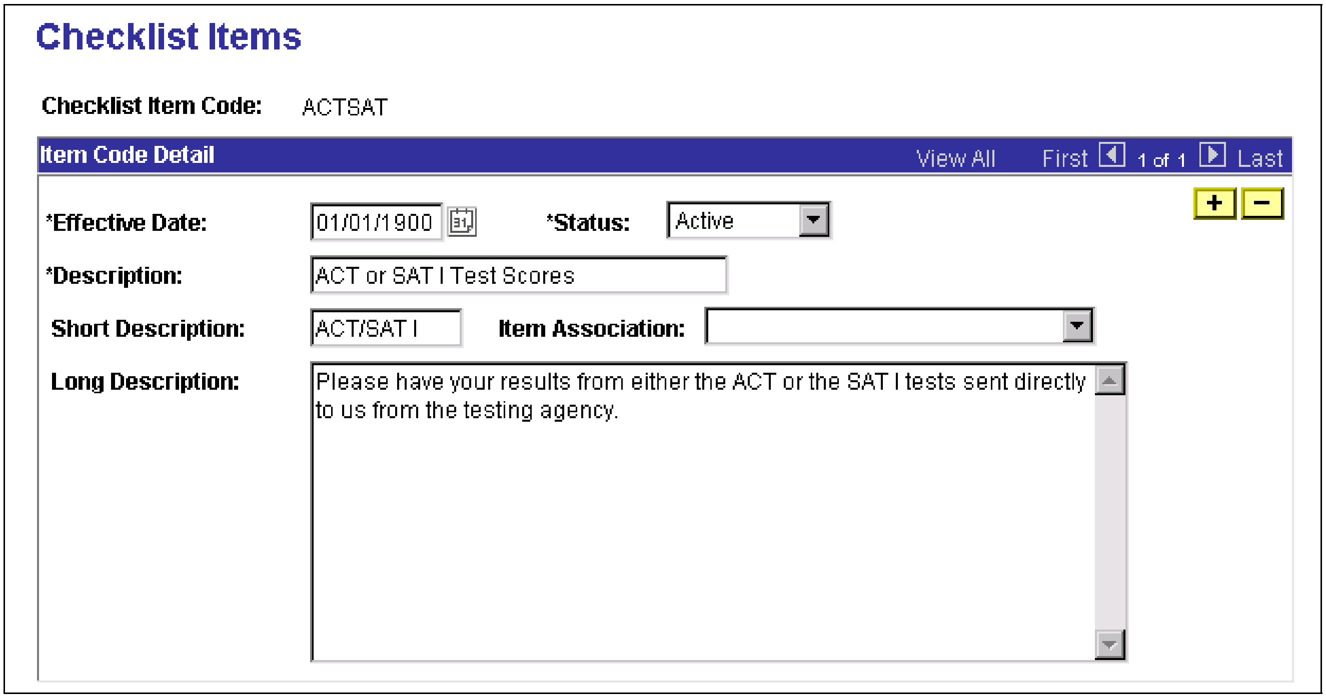
This section discusses how to define checklist items.

Page Used to Set Up Checklist Items

Page Name	Object Name	Navigation	Usage
Checklist Items	CHKLST_ITEM_TABLE	• Build Community, Checklists, Setup, Checklist Item Table, Checklist Item Table • Manage Student Financials, Collect Receivables, Setup, Checklist Item Table, Checklist Item Table • Administer Workforce, Administer Workforce (GBL), Setup, Checklist Item Table, Checklist Item Table • Administer Workforce, Administer Workforce (USF), Setup, Checklist Item Table, Checklist Item Table • Develop Workforce, Recruit Workforce (GBL), Setup, Checklist Item Table, Checklist Item Table • Develop Workforce, Recruit Workforce (USF), Setup, Checklist Item Table, Checklist Item Table • Administer Workforce, Track Global Assignments (GBL), Setup, Checklist Item Table, Checklist Item Table • Administer Workforce, Track Global Assignments (USF), Setup, Checklist Item Table, Checklist Item Table	Define items to make available for checklists.

Defining Checklist Items

Access the Checklist Items page.



Checklist Items page

Item Association

The item association, either *Name* or *Organization,* that describes whether this is a checklist item for individuals or for organizations.

The item association defined here is used on checklist management pages when you assign checklist items to an individual or organization. The Item Update − Automated process which links checklist items with transcripts, with general materials (such as recommendation letters) and with tests scores in PeopleSoft Recruiting and Admissions, also uses this.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Associating Checklist Items with Administrative Functions

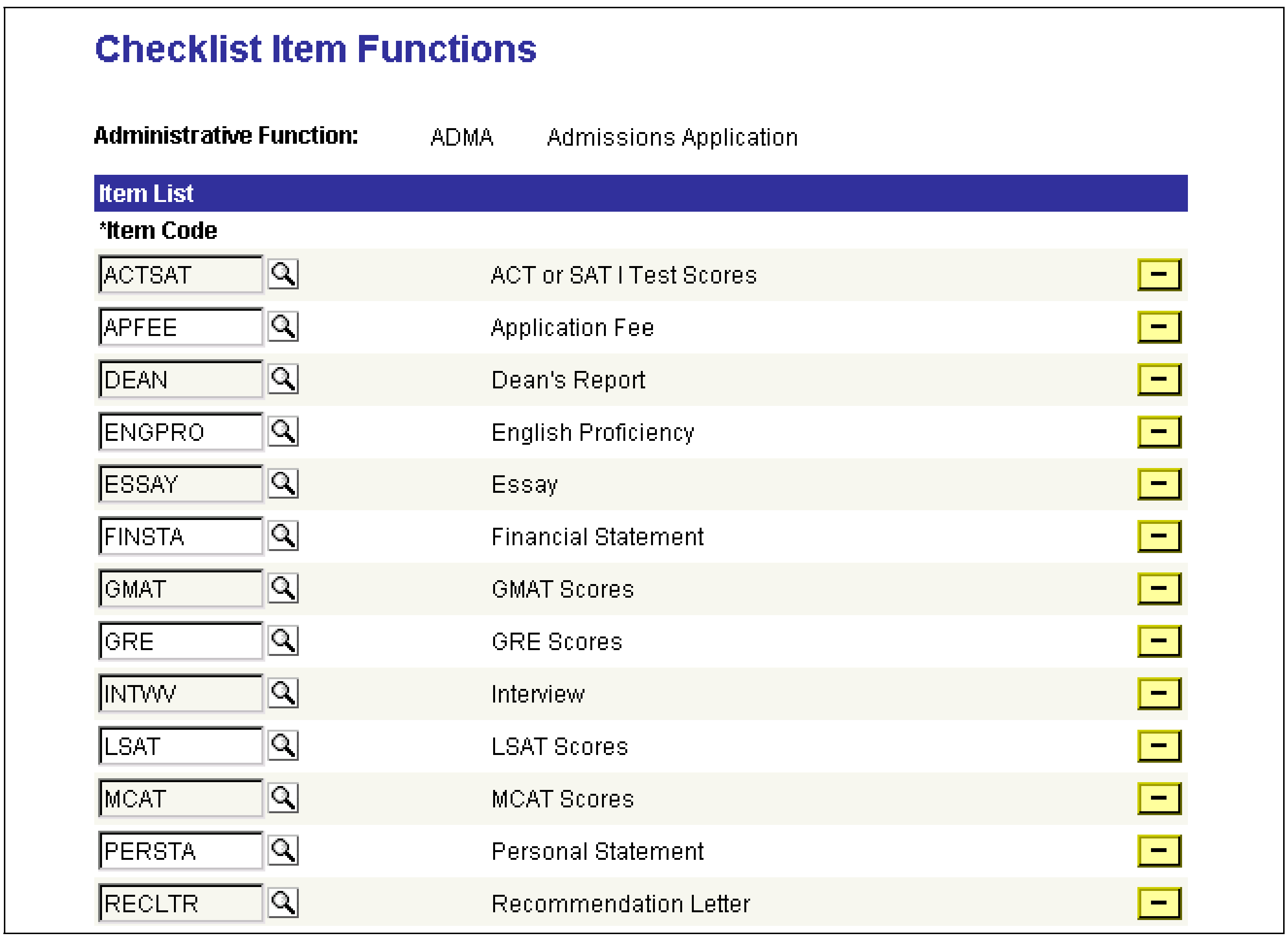
This section discusses how to associate items with a function.

Page Used to Associate Checklist

Page Name	Object Name	Navigation	Usage
Checklist Item Functions	CHK_FUNCTION_TABLE	• Build Community, Checklists, Setup, Checklist Function Item Table, Checklist Function Item Table • Manage Student Financials, Collect Receivables, Setup, Checklist Function Item Table, Checklist Function Item Table	Associate checklist items with an administrative function.

Associating Items With a Function

Access the Checklist Item Functions page.



Checklist Item Functions Table page

Item Code The code, from the Checklist Items page, for the checklist item associated with this administrative function.

Setting Up Tracking Groups

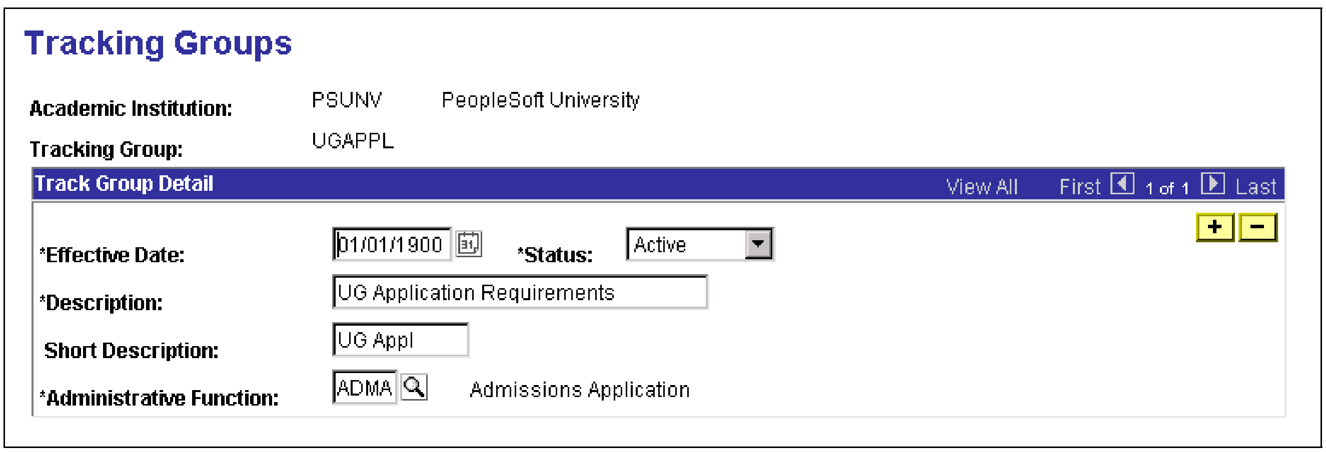
This section discusses how to create a tracking group.

Page Used to Set Up Tracking Groups

Page Name	Object Name	Navigation	Usage
Tracking Groups	TRACK_GRP_TABLE	• Build Community, Checklists, Setup, Tracking Group Table, Tracking Group Table • Manage Student Financials, Collect Receivables, Setup, Tracking Group Table, Tracking Group Table	Create tracking groups by combining two or more checklists with the same administrative function into one monitoring unit.

Creating a Tracking Group

Access the Tracking Groups page.



Tracking Groups page

Note. You can assign only one tracking group per checklist, so you might not want to make your tracking groups too broad.

Administrative Function The administrative area with which this tracking group is associated.

Checklists associated with the administrative functions that are selected here are the only checklists that are available in this tracking group.

Setting Up Checklist Templates

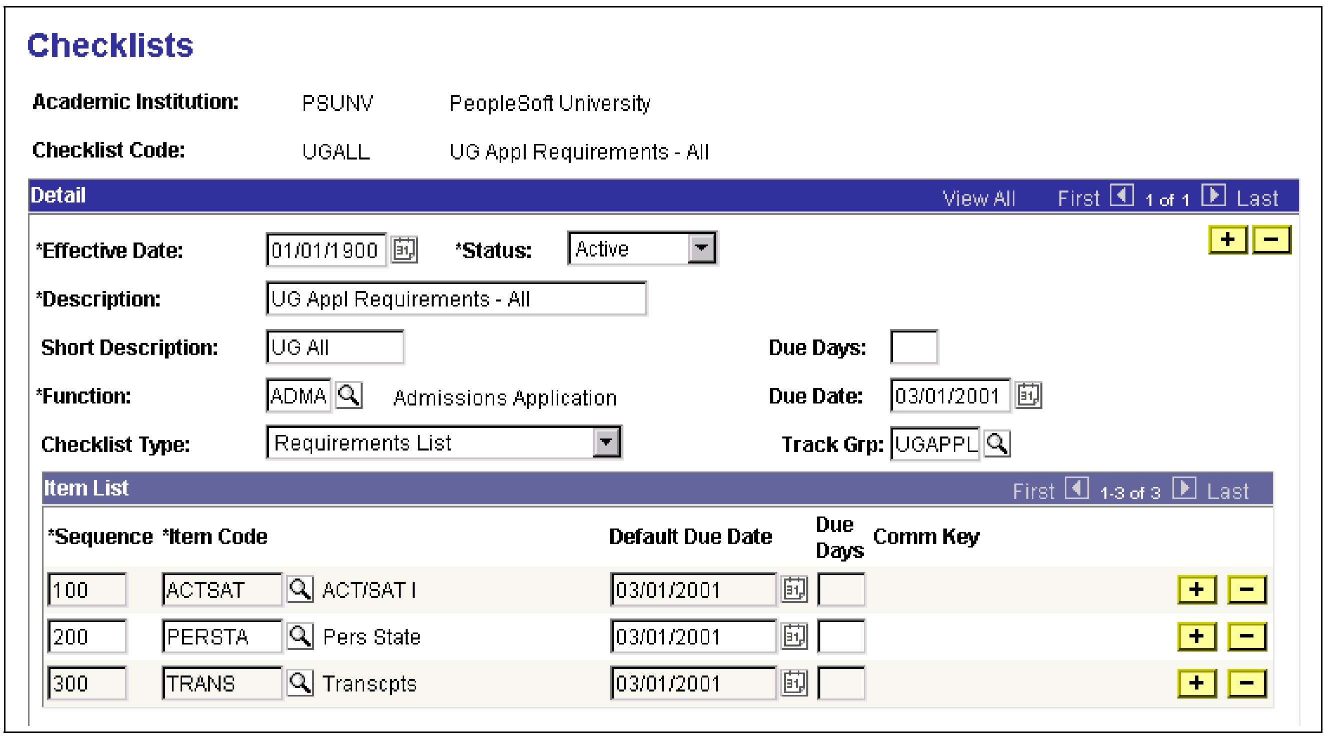
This section discusses how to create a checklist template.

Page Used to Set Up Checklist Templates

Page Name	Object Name	Navigation	Usage
Checklists	CS_CHKLST_TABLE	• Build Community, Checklists, Setup, Checklist Table, Checklist Table • Manage Student Financials, Collect Receivables, Setup, Checklist Table, Checklist Table	Create checklist templates and assign codes to them.

Creating a Checklist Template

Access the Checklists page.



Checklists page

Detail

Function

The code for the administrative area with which the items for this checklist are associated. Codes are available based Checklist Item Functions page for this checklist.

Checklist Type

The type that best describes this checklist.

The following checklist types are delivered with your system as translate values: (ADC) Condition List, (CML) Communication List, (HIR) Hiring, (MED) Medical, (PRM) Promise, (RQL) Requirements List, (SAL)

Staff Assignment List, (TER) Termination, (TRN) Training, and (XFR) Transfer. You can modify these translate values.

Of the delivered checklists types, the ones most relevant to the management of student administration and contributor relations are:

(CML) Communication List: A list of the communications (letters, brochures, phone calls) that have occurred with a person over a period of time.

(PRM) Promise: Records the amount and due dates of a person's promise-to-pay.

(RQL) Requirements List: A list of items that a student must accomplish or submit to move on to the next step of a process. For example, this might be a list of all the materials required to complete an application to your institution. You can also use items from a requirements list in the letter generation process to notify students of their missing application items.

(SAL) Staff Assignment List: A list of items that a staff member needs to accomplish relative to a particular student.

Due Days The number of days, calculated from the assign date, by which all items on this checklist must be completed.

Due Date The date by which all items on this checklist must be completed.

Track Group The group, from the Tracking Groups page, to which this checklist should be assigned for monitoring.

Item List

Sequence The number of this item in the list of items for this checklist.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of checklist items.

Item Code The item code, from Checklist Item Functions page, for this checklist item.

Default Due Date The system displays the due date from the top of the page as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Due Days The system displays the due date from the top of the page as the default due days value for each checklist item. You can override this number, but it must be with a *lesser* number so that the item due date does not exceed the overall due date of the checklist.

Comm Key When you create a checklist of the default type that is set on the Installation Table − SA Options page (*Communications List* is the delivered default value), the Comm Key field becomes available.

Select the Comm Key, to also assign the specified communications to the individual or organization to which you are assigning the checklist.

Setting Up Checklist 3C Groups

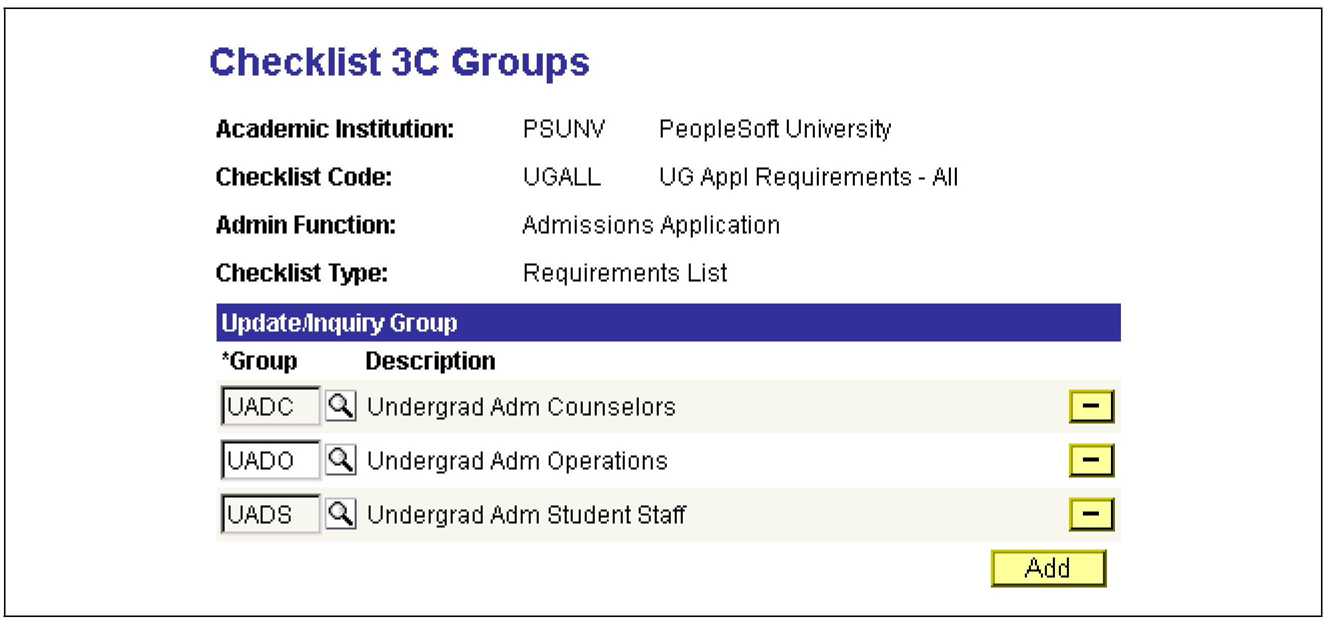
This section discusses how to create a checklist 3C group.

Pages Used to Assign Checklist Groups for 3C Security

Page Name	Object Name	Navigation	Usage
Checklist 3C Groups	CS_CHKLST_3CGRP	• Build Community, Checklists, Setup, Checklist 3C Groups, Checklist 3C Groups • Manage Student Financials, Collect Receivables, Setup, Checklist 3C Groups, Checklist 3C Groups	Create checklist 3C groups to grant security access to checklists in your database.

Creating a Checklist 3C Group

Access the Checklist 3C Groups page.



Checklist 3C Groups page

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Securing Campus Community Security and Copying User Security,” Setting Up 3C Group Security

CHAPTER 16

Setting Up Committee Templates

This chapter provides an overview of committee templates and discusses how to:

- Name the committee type.
- Specify the record from which members should be selected.
- Specify and describe each role that should be part of that type of committee.

Understanding Committee Templates

As in any business, you repeatedly create committees with the same structure and the same member roles--only the set of people who should serve on those committees and their individual names change. PeopleSoft Campus Community enables you to define the types of committees that your institution creates, identify the roles that should be on each committee, and then use the types and roles to create templates to help you create and manage committees across your institution.

For example, you could create a template for an undergraduate interviews committee type and associate the roles of chairperson and three interviewers with it. You might want members of this committee type to be recruiters and advisors, in which case you would associate all recruiter and all advisor records with the committee type to provide prompt lists from which to assign individuals to this committee. You then use the template to create a current or ongoing committee and assign individuals to the chair and member roles. You can also specify the dates during which each individual should participate in the committee.

Common Elements Used in This Chapter

Record Name The name of the record containing the types of individuals to make available for assignment to this committee. The selected record provides the prompt list of possible members on the Committee page.

For example, if you create an Undergraduate Interviews committee, and you select the RECRUITERS_VW record, each time that you create a committee of the Undergraduate Interviews type, you are prompted to select members from the list of recruiters in your system.

Committee Role The role (*Chair, Co-Chair, Member, Student Member,* and so on) that should always be part of this committee type. You can add as many roles as necessary.

	Values for this field are delivered with your system as translate values. You can modify these translate values.
Committee Name	The name of this specific committee.
Committee Type	The type of committee from the Committee Type/Role page that describes this committee.
Member Number	The number of this member in the list of members for this committee. The system automatically enters the next sequential number for each member that you add. You can override the number manually to reorder the list of committee members.
ID	The ID of the individual assigned to this committee. The system displays the individual's name after you select the ID.
Role	The role assigned to this individual for this committee.
Start Date	The date when the member's participation in this committee is scheduled to begin.
End Date	The date when the member's participation in this committee is scheduled to end.

Setting Up Types and Roles

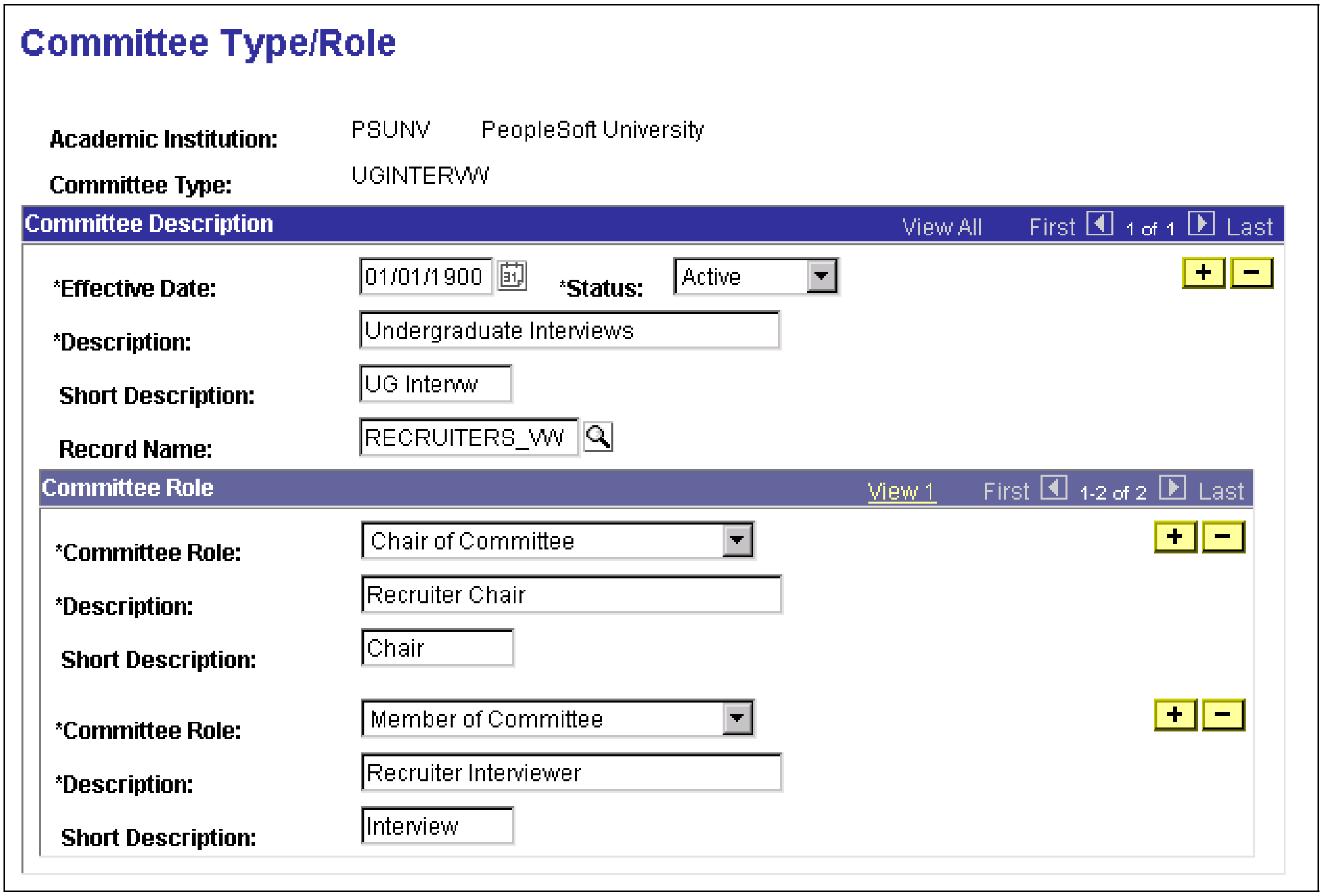
This section discusses how to define a committee type and assign member roles.

Page Used to Set Up Types and Roles

Page Name	Object Name	Navigation	Usage
Committee Type/Role	COMMITTEE_TABLE	• Build Community, Committees, Setup, Committee Type/Role, Committee Table • Design Student Administration, Design Financial Aid1, Setup C-E, Committee Types/Roles, Committee Types/Roles • Manage Student Records, Track Student Careers, Setup, Committee Type/Role, Committee Table	Define a committee type and assign member roles.

Defining a Committee Type and Assigning Member Roles

Access the Committee Type/Role page.



Committee Type/Role page

Committee Description

Record Name

The name of the record containing the types of individuals to make available for assignment to this committee. The selected record provides the prompt list of possible members on the Committee page.

For example, if you create an Undergraduate Interviews committee, and you select the RECRUITERS_VW, each time that you create a committee of the Undergraduate Interviews type, you are prompted to select members from the list of recruiters in your system.

Committee Role

Committee Role

The role (*Chair, Co-Chair, Member, Student Member,* and so on) that should always be part of this committee type. You can add as many roles as necessary.

Values for this field are delivered with your system as translate values. You can modify these translate values.

CHAPTER 17

Setting Up Events

This chapter gives an overview of setting up events and discusses how to:

- Define events.
- Create an event template.

Note. Be careful not to confuse the events described here with 3C engine events. One attends the events described here. 3C engine events are occurrences in data within your system.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Preparing for the Course Catalog and Schedule of Classes"

Understanding Events

You must define the items that you want to make available for events.

Here's what you do to define events:

- Define event types.
- Define event resource codes.
- Define event staff codes.

An event consists of one or more meetings each of which has its own resources and staff. You can create templates for recurring or similar events by defining the meetings typically required for that type of event. You can then use or modify the template for recurring or similar events that require the same or similar meetings, resources, and staff each time. Event templates are optional, however, they can be very useful guidelines that save time.

Note. You can create only one template per event type.

To create an event template, do the following:

1. Define the meetings for that event type.
2. Assign the resources for each meeting.
3. Assign the type of staff for each meeting.

Defining Events

This section discusses how to define events.

Pages Used to Define Events

Page Name	Object Name	Navigation	Usage
Event Types	EVENT_TYPE_TABLE	• Build Community, Events, Setup, Event Type Table, Event Type Table • Manage Contributor Relations, Manage Events, Setup, Event Type Table, Event Type Table	Define the general types of events.
Resource Codes	RESOURCE_CD_TABLE	Build Community, Events, Setup, Resource Code Table, Resource Code Table	Review or create codes for the resources to make available for events (tables, chairs, brochures, banners, and so on).
Staff Codes	STAFF_CODE_TABLE	Build Community, Events, Setup, Staff Code Table, Staff Code Table	Identify and set up the types of staff for events (speakers, admissions counselors, tour guides, cooks, servers, and so on).

Defining Event Types

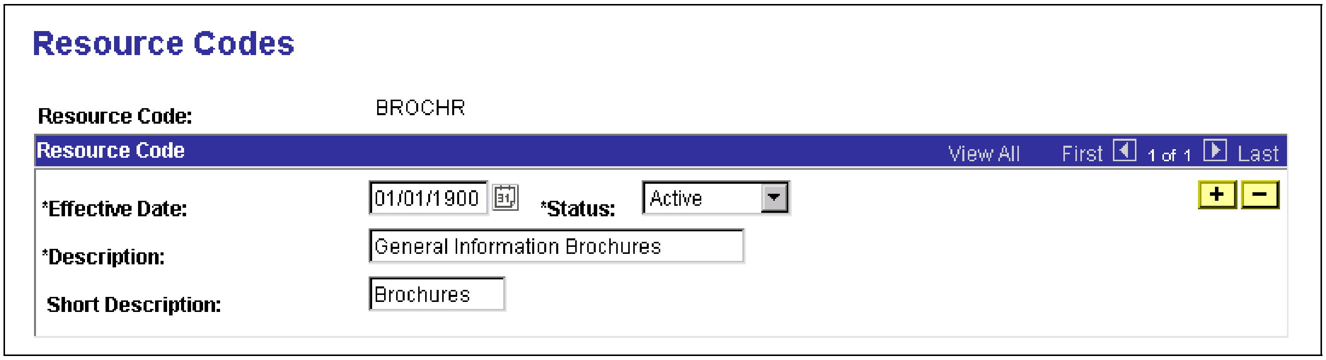
Access the Event Types page.

Event Types page

Comment Enter comments to further identify or describe this event.

Defining Event Resource Codes

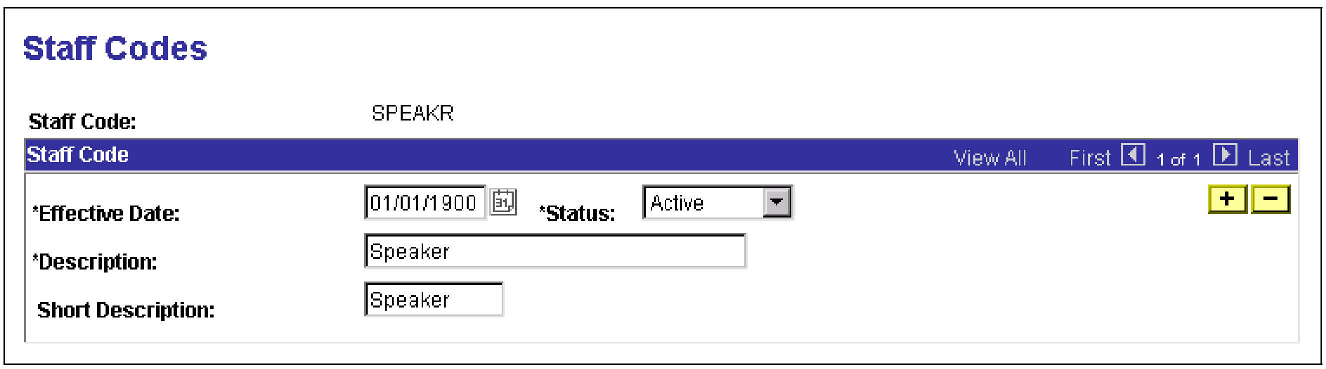
Access the Resource Codes page.



Resource Codes page

Defining Event Staff Codes

Access the Staff Codes page.



Staff Codes page

Creating an Event Template

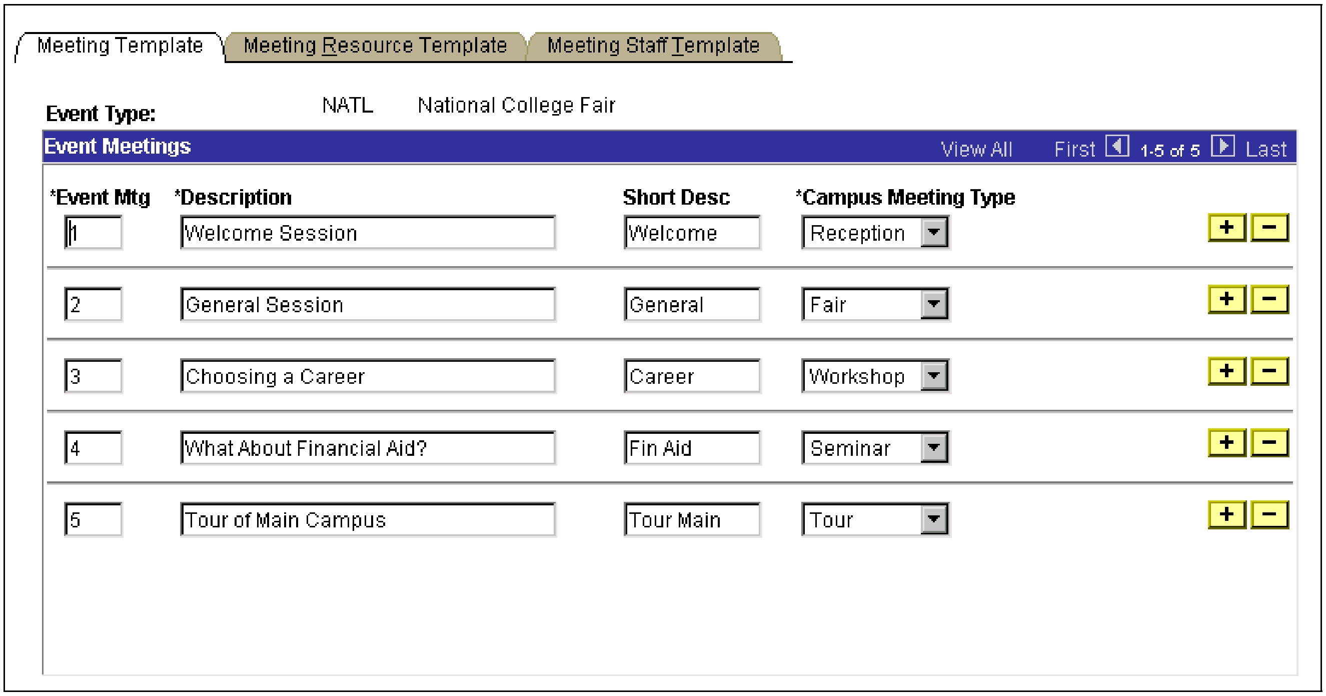
This section discusses how to create an event template.

Pages Used to Create an Event Template

Page Name	Object Name	Navigation	Usage
Meeting Template	MTG_TMPL	• Build Community, Events, Setup, Event Template, Meeting Template • Manage Contributor Relations, Manage Events, Setup, Event Template, Meeting Template	Identify meetings that comprise that event type.
Meeting Resource Template	MTG_RSRCE_TMPL	• Build Community, Events, Setup, Event Template, Meeting Resource Template • Manage Contributor Relations, Manage Events, Setup, Event Template, Meeting Resource Template	Assign resources required for each meeting in the event.
Meeting Staff Template	MTG_STAFF_TMPL	• Build Community, Events, Setup, Event Template, Meeting Staff Template • Manage Contributor Relations, Manage Events, Setup, Event Template, Meeting Staff Template	Designate the type of staff for each meeting in the event.

Creating an Event Meeting Template

Access the Meeting Template page.



Meeting Template | Meeting Resource Template | Meeting Staff Template

Event Type: NATL National College Fair

Event Meetings View All First 1-5 of 5 Last

*Event Mtg	*Description	Short Desc	*Campus Meeting Type
1	Welcome Session	Welcome	Reception
2	General Session	General	Fair
3	Choosing a Career	Career	Workshop
4	What About Financial Aid?	Fin Aid	Seminar
5	Tour of Main Campus	Tour Main	Tour

Meeting Template page

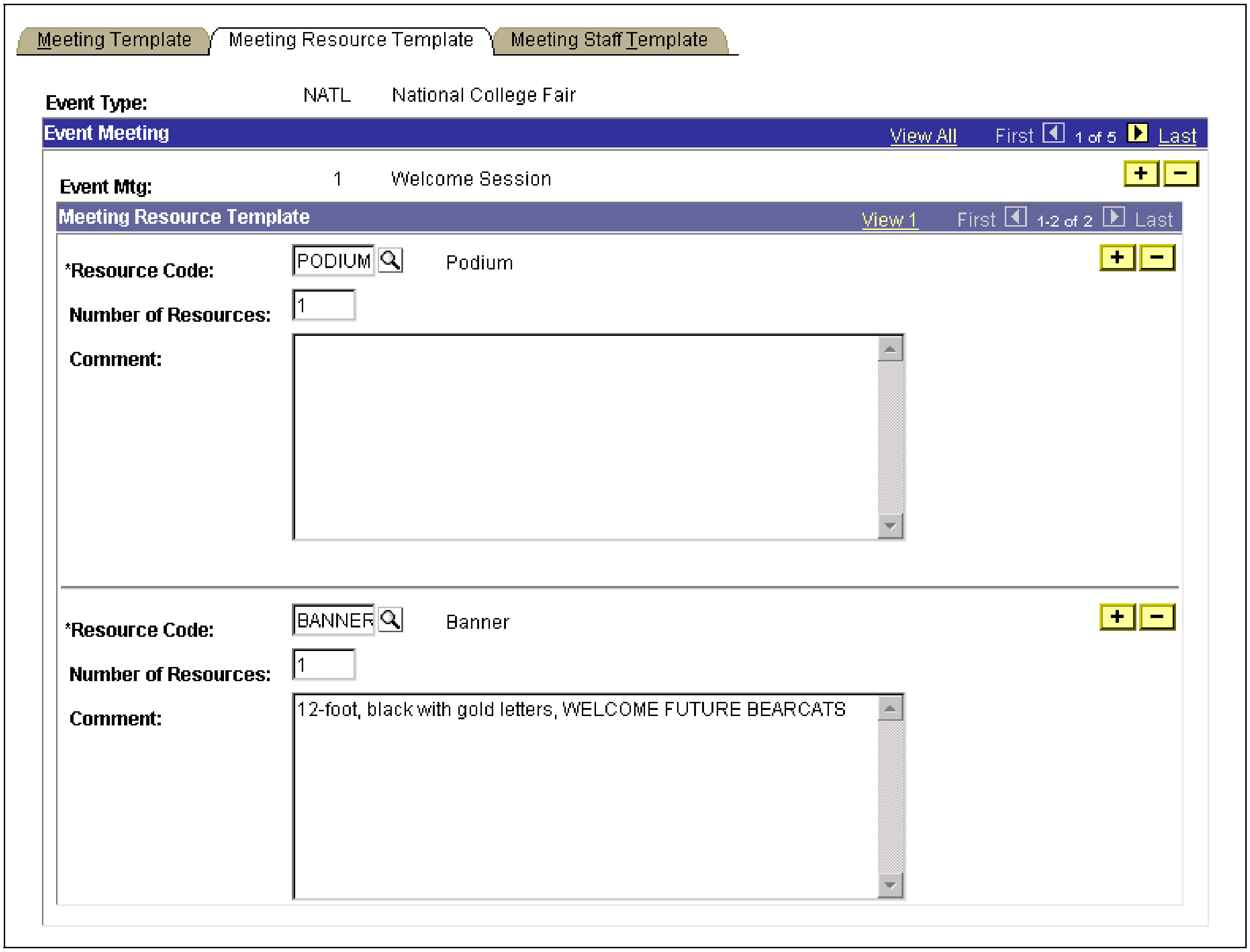
Event Meeting The system enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.

Campus Meeting Type Select the meeting type that best describes this meeting.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Assigning the Meeting Resources

Access the Meeting Resource Template page



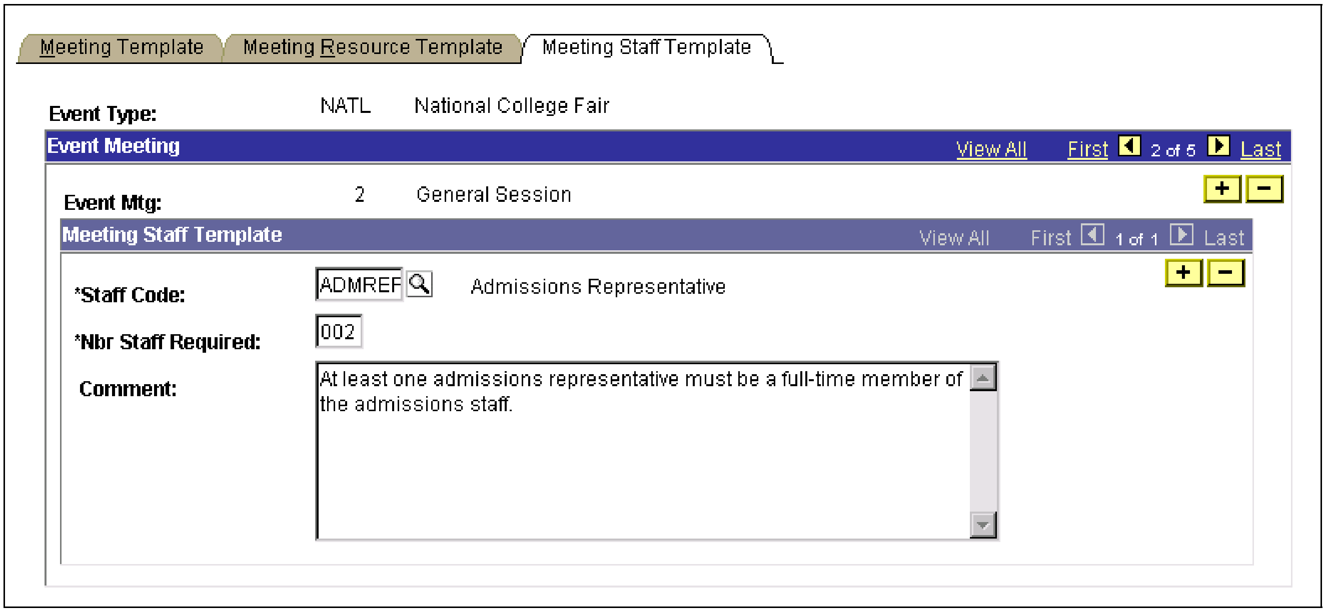
Meeting Resource Template page

Meeting Resource Template

Resource Code	Select the type of resource, from the Resource Codes page, required for this meeting.
Number of Resources	Enter the number or quantity of the resource required for this meeting.
Comments	Enter comments to further identify or describe this resource.

Assigning the Type of Meeting Staff

Access the Meeting Staff Template page.



Meeting Staff Template page

Meeting Staff Template

Staff Code Select the type of staff, from the Staff Codes page, required for the meeting.

Number of Staff Enter the total number of this type of staff required for the meeting

Comment Enter comments to further describe or identify the staff required for the meeting.

CHAPTER 18

Managing IDs

This chapter provides an overview of ID management and discusses how to:

- Create IDs.
- Delete IDs.
- Change IDs.
- Update ID types.

See Also

Chapter 19, “Searching for Records,” page 159

Chapter 32, “Managing Services Data,” Entering External System IDs, page 403

Understanding ID Management

Unique IDs are vital to PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions. When you add an individual or organization, the system creates a record and assigns the next available unique ID. The unique ID remains associated with that individual or organization unless or until you change or delete it. When you want to add, update, or delete data about that individual or organization, use the unique ID to narrow your search and save time accessing the record.

To prevent arbitrary or accidental deletion of IDs, assign priority control data. Priority control data prevents users from deleting any ID that contains that data without first evaluating the data. Priority control data also prevents users from having to appeal to the system administrator or other individuals with the appropriate level of system security, to delete the data.

You can change the ID type (individual or organization) or override a system-generated ID number.

You can determine the last ID assigned and determine or adjust the maximum length of system-generated IDs by using the installation pages.

See Also

Chapter 19, “Searching for Records,” page 159

Creating IDs

When you add an individual or organization to your database, the system creates a record and assigns the next available unique ID.

See Also

Chapter 20, "Maintaining Bio/Demographic Data," Adding People to Your Database, page 171

Chapter 33, "Adding Organizations to Your Database," page 409

Deleting IDs

This section provides an overview of ID deletion, it lists prerequisites, and it discusses how to:

- Select an individual ID to delete.
- Select an organization ID to delete.

Understanding ID Deletion

When you try to delete an ID in PeopleSoft Student Administration Solutions, a warning appears that instructs you to confirm or cancel the deletion. If you decide to proceed with the deletion and the ID contains data in any of the priority records that are specified on the ID Delete Control page, the system does not allow the deletion. Instead, it displays an ID deletion prevention message that lists the specific records and key fields that contain priority data for the ID. To delete the ID, you or your system administrator must first remove the associated priority data.

Warning! Deleting an ID not only deletes the ID number, it also deletes all key data that is associated with that ID throughout the system. This loss of data could affect other departments. If the ID contains priority data, coordinate the need to delete it with other departments before deleting the priority data and the ID.

Prerequisites

Identify priority control data to prevent the unwanted deletion of individual and organization IDs.

See Also

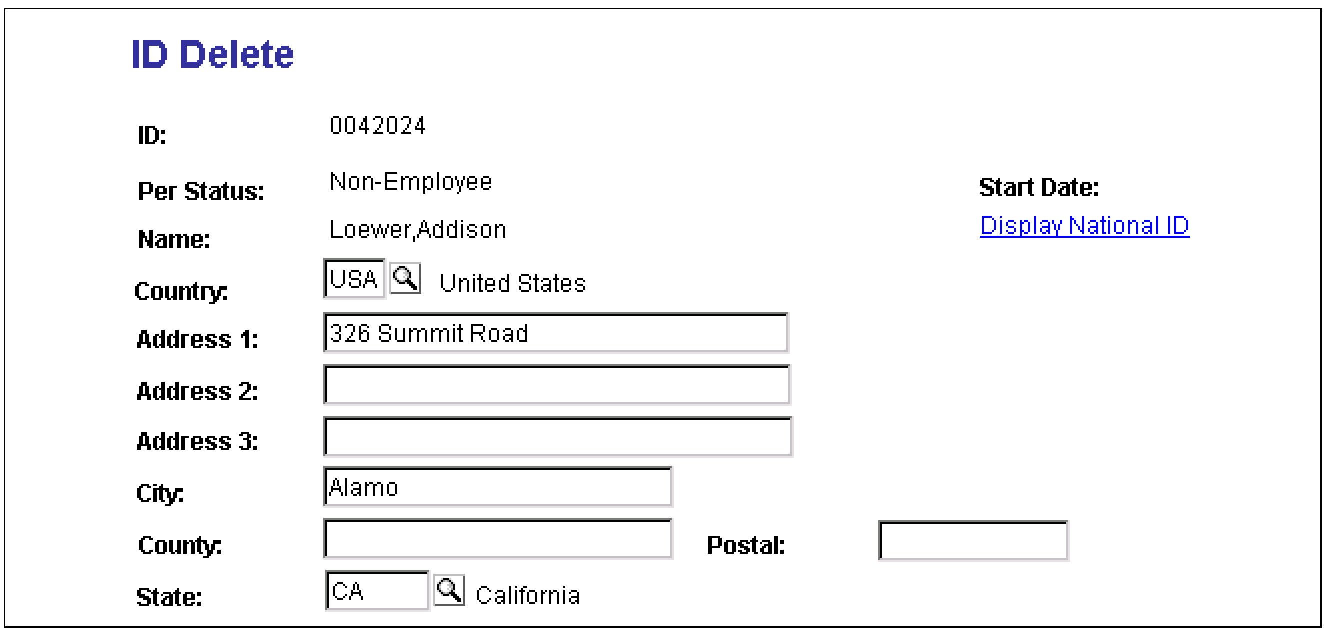
Chapter 3, "Setting Up ID Delete Control," page 39

Pages Used to Delete IDs

Page Name	Object Name	Navigation	Usage
ID Delete	EMPLOYEE_ID_DELETE	• Build Community, Bio/Demographic Data, Process, ID Delete, ID Delete • Administer Workforce, Administer Workforce (USF), Process, ID Delete, ID Delete	Select an individual ID to delete.
Display National ID	NID_DISPLAY_SEC	Click the Display National ID link on the ID Delete page.	Review the individual's national ID to confirm that this is the ID to delete.
Organization ID Delete	ORG_ID_DELETE	Build Community, Organization Data, Process, Organization ID Delete, Organization ID Delete	Select an organization ID to delete.

Selecting an Individual ID to Delete

Access the ID Delete page.


ID Delete

ID: 0042024

Per Status: Non-Employee

Start Date:

Name: Loewer,Addison

Display National ID

Country: USA United States

Address 1: 326 Summit Road

Address 2:

Address 3:

City: Alamo

County:

Postal:

State: CA California

ID Delete page

Per Status and **Start Date** For use with PeopleSoft Human Resources Management (PeopleSoft HRMS).

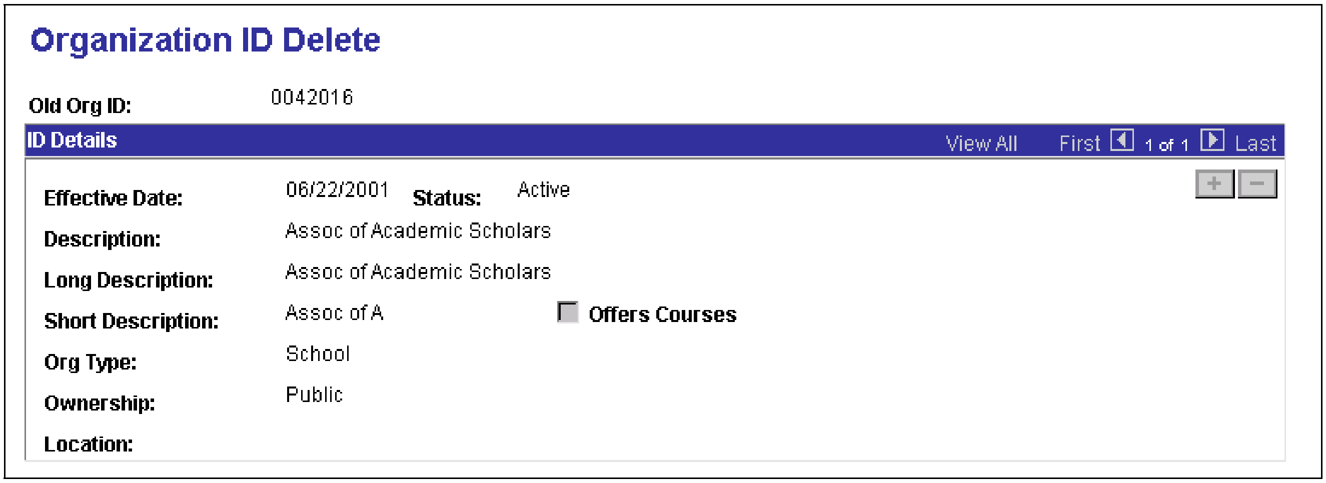
See *PeopleSoft Human Resources Management System PeopleBooks*

Display National ID Click to access the Display National ID page, where you can review the individual's national ID numbers to further determine if this is the individual to delete.

Country, Address 1, Address 2, Address 3, City, County, Postal, and **State** — Review to verify that this is the ID to delete.

Selecting the Organization ID to Delete

Access the Organization ID Delete page.



Organization ID Delete page

Description, Org Type (organization type), **Ownership,** and **Location** — Review to verify that this is the ID to delete.

Changing IDs

This section provides an overview of ID changes and discusses how to:

- Change an individual ID.
- Change an organization ID.

Understanding ID Changes

You can change system-generated IDs, but you must change and manage them manually.

For example, you might want to change the system-generated IDs of 0000012, 0000035, and 0000062 to the IDs of PRES01, PRES02, and PRES03 to group those specific individuals into a list that only the president of the institution should manage. When you change them, the original system-generated IDs drop from the list of numbered IDs and appear instead as in a group of initial alpha character IDs. That is, the numbered ID list shows 0000033, 0000034, 0000036, 0000037, but the ID of 0000035 that you changed is not listed. That individual is now PRES02 in the list of IDs that are PRES01, PRES02, and PRES03.

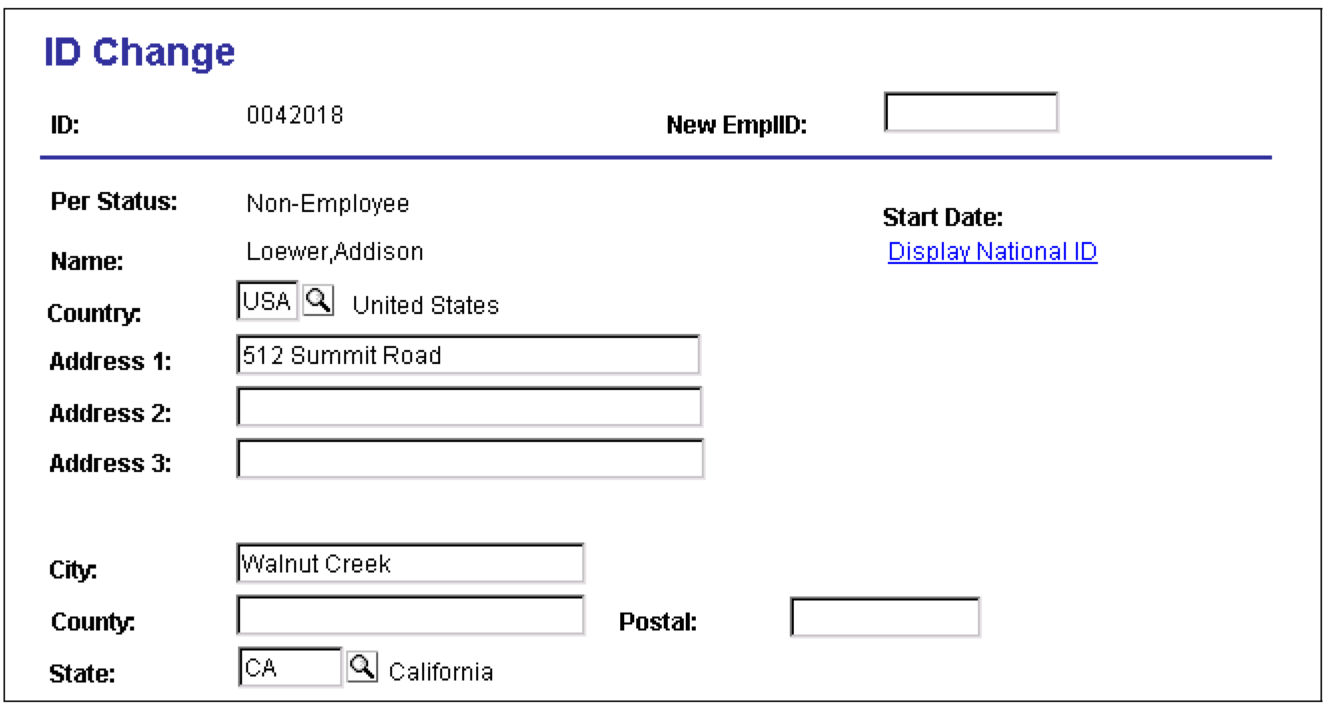
Warning! Changing an ID changes the ID throughout the system. This change can affect other departments. Coordinate the need to change the ID with other departments before making the change.

Pages Used to Change IDs

Page Name	Object Name	Navigation	Usage
ID Change	EMPLOYEE_ID_CHANGE	• Build Community, Bio/Demographic Data, Process, ID Change, ID Change • Define Business Rules, Administer HR System, Process, ID Change, ID Change • Administer Workforce, Administer Workforce (USF), Process, ID Change, ID Change	Change an individual ID.
Org ID Change (organization ID change)	ORG_ID_CHANGE	Build Community, Organization Data, Process, Organization ID Change, Organization ID Change	Change an organization ID.

Changing an Individual ID

Access the ID Change page.



ID Change page

Per Status and **Start Date** For use with PeopleSoft HRMS.

See *PeopleSoft Human Resources Management System PeopleBooks*

Display National ID Click to access the Display National ID page, where you can review the individual's national ID numbers to further determine if this is the ID to change.

New EmplID (new employee ID)

Enter the new ID to assign to this individual, replacing his or her existing ID.

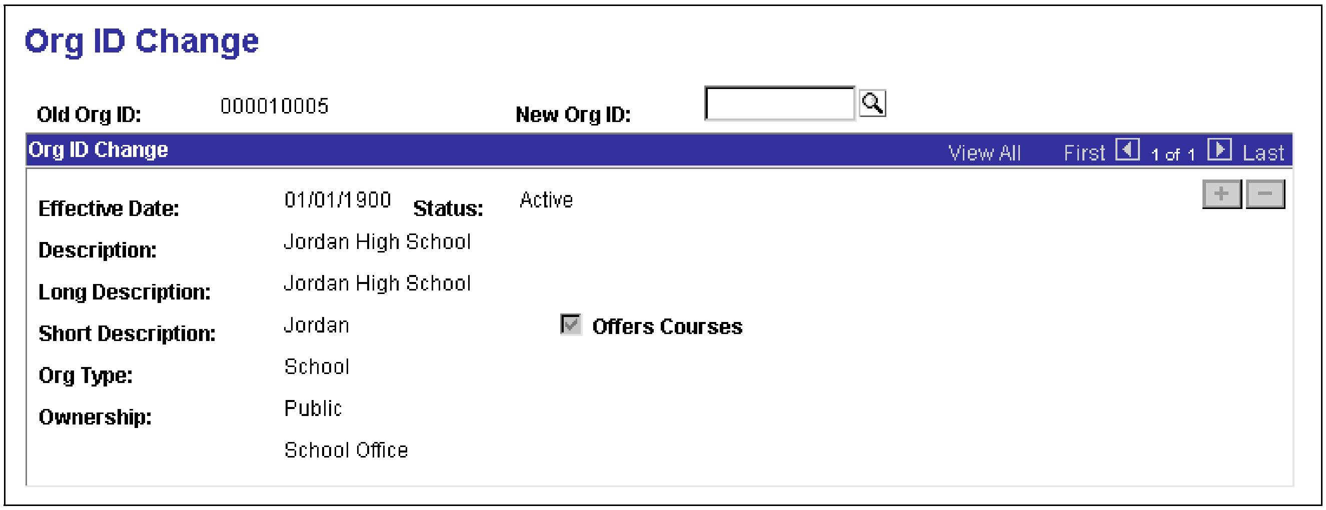
When you save the page, the system changes the ID.

Country, Address 1, Address 2, Address 3, City, County, Postal, and **State**

Review to verify that this is the ID to change.

Changing an Organization ID

Access the Org ID Change page.



Org ID Change page

New Org ID (new organization ID)

Enter the new ID to assign to this organization, replacing its existing ID.

When you save the page, the system changes the organization ID.

Description, Org Type (organization type), and **Ownership**

Review to confirm that this is the organization ID to delete.

Updating ID Types

This section provides an overview of updating ID types and discusses how to run the Update ID Type process.

Understanding ID Type Updates

You manage individual and organization ID types from a single source table. By storing each ID type—either a person or an organization ID type—in a single table and associating an indicator flag value to each, you can use individual or organization IDs as a single ID field in applications that are common to both individuals and organizations.

Page Used to Update ID Types

Page Name	Object Name	Navigation	Usage
Update ID Type	RUNCTL_CCIDTYPE	Build Community, Bio/Demographic Data, Process, Update ID Type, Update ID Type	Run the Update ID Type process to associate the correct ID type—either person or organization—with each ID in your system.

Running the Update ID Type Process

Access the Update ID Type run control page.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Using PeopleSoft Process Scheduler”

CHAPTER 19

Searching for Records

This chapter provides an overview of searching for records and discusses how to use Search/Match.

Understanding Record Search

When you select a record from a dialog box, a search page, or a prompt list on a page, your system searches for and retrieves that record so that you can enter or view data. When you add an individual to your database, the system launches a search (based on Search/Match criteria) to determine if a record containing that same data already exists. The system warns you that the other record exists, but it does not retrieve that record for you. Both of these searches are launched automatically.

Maintaining the integrity of IDs and their associated data is very important toward maximizing what your system can do for you. To prevent duplicate or multiple records, you should determine if an individual or organization already exists in your database before creating (or recreating) the record. Use the search/match process to detect multiple records.

You can also launch your own search, using the Search/Match feature, to determine if duplicate or multiple records exist, and retrieve the records to review or edit them. You can also launch a search, using the Organization Search feature, to determine if duplicate or multiple organization records exist.

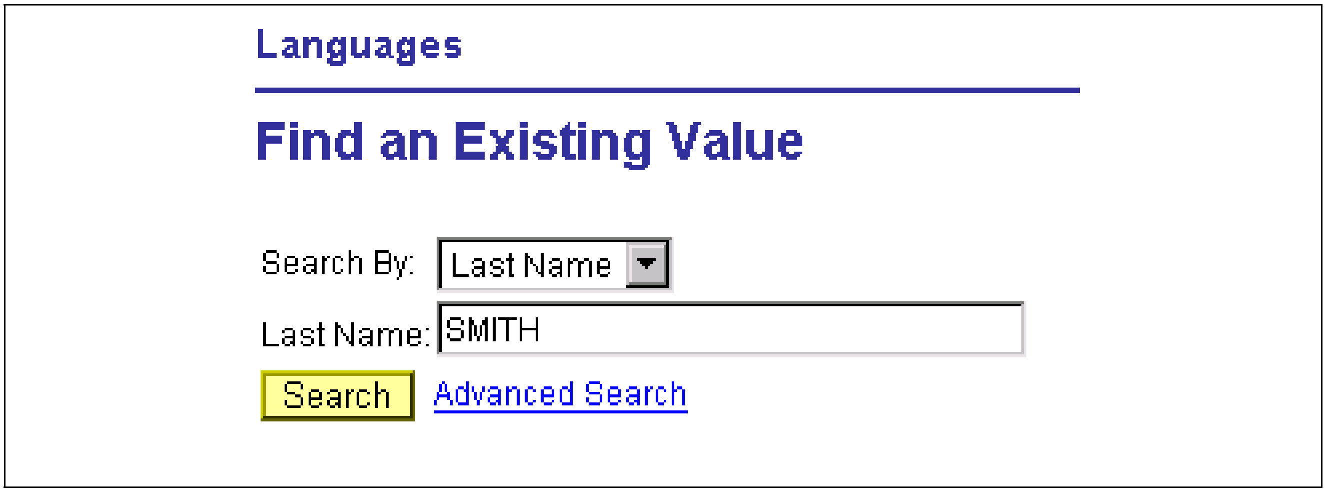
To view or update data on an existing record, select the menu item for the type of data to view and enter key criteria on the related search box page. ID is often the default key criteria. If you enter nothing and click OK, the system searches for all records with IDs. However, because all records have IDs, the list is much too large for the system to display at one time. You must enter some of the characters of the ID, or any of the other key criteria.

For example, you might want to determine which languages Bernice Smith speaks proficiently enough to translate. You would select Build Community, Bio/Demographic Data, Use, Languages. A search box page appears with a list of the search options for people: Campus ID, ID, First Name, Last Name, and National ID. (Different or additional fields may be present depending on the type of data associated with the menu item that you select, or if you are searching for records for organizations.)

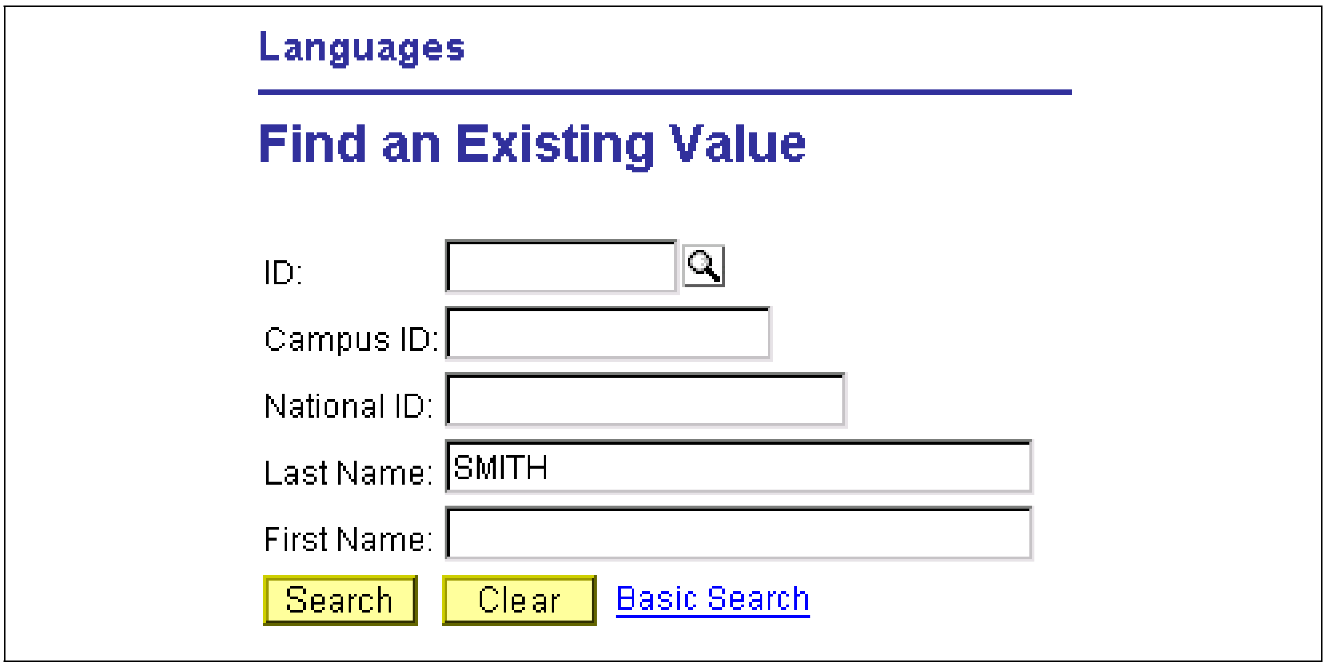
To narrow your search and minimize the system's record retrieval time, either the individual's unique ID or national ID. If you do not know either ID, enter any of the criteria that you do know. For example, you could select the Last Name option and enter *Smith.*

The system searches for and retrieves all records containing the data that you enter. It lists the resulting records in rows at the bottom of the page. Select the row with the specific data that you require. For example, if you enter only *Smith* in the Last Name field, rows for all individuals with the last name *Smith* are listed in the search results. You would select the row with the first name *Bernice.*

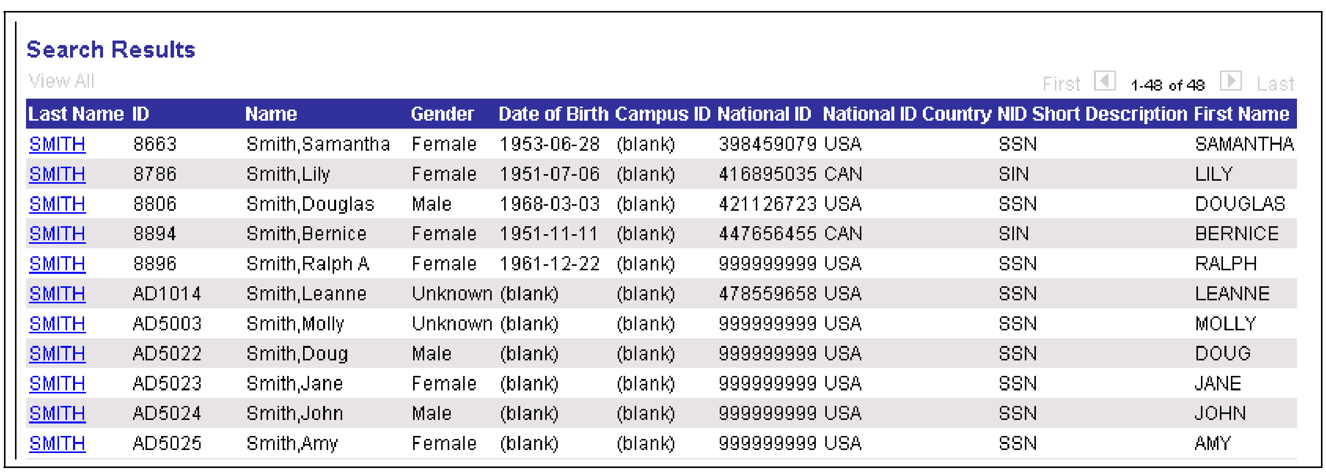
If you want to enter all of the data that you know about an individual to control the search, you can click the Advanced Search and enter that data.



Using the search page in Basic Search mode



Using the search page in Advanced Search mode



Last Name	ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	First Name
SMITH	8663	Smith,Samantha	Female	1953-06-28	(blank)	398459079	USA	SSN	SAMANTHA
SMITH	8786	Smith,Lily	Female	1951-07-06	(blank)	416895035	CAN	SIN	LILY
SMITH	8806	Smith,Douglas	Male	1968-03-03	(blank)	421126723	USA	SSN	DOUGLAS
SMITH	8894	Smith,Bernice	Female	1951-11-11	(blank)	447656455	CAN	SIN	BERNICE
SMITH	8896	Smith,Ralph A	Female	1961-12-22	(blank)	999999999	USA	SSN	RALPH
SMITH	AD1014	Smith,Leanne	Unknown	(blank)	(blank)	478559658	USA	SSN	LEANNE
SMITH	AD5003	Smith,Molly	Unknown	(blank)	(blank)	999999999	USA	SSN	MOLLY
SMITH	AD5022	Smith,Doug	Male	(blank)	(blank)	999999999	USA	SSN	DOUG
SMITH	AD5023	Smith,Jane	Female	(blank)	(blank)	999999999	USA	SSN	JANE
SMITH	AD5024	Smith,John	Male	(blank)	(blank)	999999999	USA	SSN	JOHN
SMITH	AD5025	Smith,Amy	Female	(blank)	(blank)	999999999	USA	SSN	AMY

Viewing search results from basic or advanced search modes

Note. Use the Search/Match feature to determine if a record exists for an individual. Use Organization Search to determine if a record exists for an organization. Use the search box pages to retrieve existing records to view or update data.

See Also

Chapter 34, "Managing Organization Data," Using Organization Search, page 447

Using Search/Match

This section provides an overview of Search/Match and discusses how to:

- Specify data for a search.
- View Search/Match results.
- Determine relations with institution.

Understanding Search/Match

To use the full functionality of your system you must maintain the integrity of your database. Because users from many departments enter data into your system, you will want to take measures to minimize duplicate or multiple records, including requiring users to determine if a record already exists for an individual before adding one. The Search/Match feature enables you to define criteria by which the system checks for duplicate or multiple entries.

Important! Search/Match is a PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions feature. It does not execute when adding an individual through PeopleSoft HRMS.

You can define a number of search levels to determine if duplicate or multiple entries exist. The search levels are successively less and less restrictive, with the lowest or first search level the most restrictive and the highest or last search level the least restrictive. The system continues the search until either a potential duplicate is encountered or all search conditions are executed and no potential duplicate is encountered. A search condition is bypassed if one or more of the search fields does not contain any data.

Five search levels (search orders 10, 20, 30, 40, and 50) are predefined. You can use these as they are, modify the search data, rearrange the order of searches, or add more search orders.

Warning! Adding a field to a search order may require significant programming. If the field does not already exist on the DERIVED_PERDATA record, you must add it there and to all possible affected pages for online add search/match to invoke the search order. You must also add the field to the SQR and Cobol background programs that use search/match to set values for that field. When modifying background programs, remember that in a background program, each field name in a search order requires a bind variable ($bind#). SQR is limited to a maximum of 40 bind variables per search order and a maximum of 30 search orders. Cobol programs do not have these limitations.

To define a search level, specify an order number to indicate where in the sequence of searches the search should be performed. Then, identify the records and fields containing the information for the system to search for and check. The system displays the total number of characters in each selected field. You can use this information to configure the search to compare against the entire field or any number of characters in the field. For example, the Address 1 field might be 35 characters in total. Search order 10 when shipped, is set to look at only at characters 1 through 5 of the Address 1 field, but it is set to look at the entire fields for birthdate, sex, and national ID.

You can also configure the search to accept blank data or accept only a strict match of the criteria. For example, if you set the Birthdate field to accept a blank match, when the system encounters a record that contains data matching other criteria in the search but no birthdate, it will include the record in the results. Conversely, if you set birthdate to strict match only, when the system encounters a record that contains a birthdate value, it will include the record in the results only if the birthdate matches the criteria exactly, whether or not other data match criteria in the defined search.

Note. The system also uses the Search/Match criteria in the search that launches when you add an individual to your database and when you run a third-party data load process. For automatic searches, the system goes through all search orders, performing a search only when data exists for each field listed in the search criteria. A blank value causes the system to move to the next search order. When you run the search manually, as described in this section, you can assign the search orders that the system should use and dictate the types of field values (blank or strict match) that should force the search to the next search order.

Prerequisites

Before using Search/Match, set up Search/Match criteria and define default search orders.

See Also

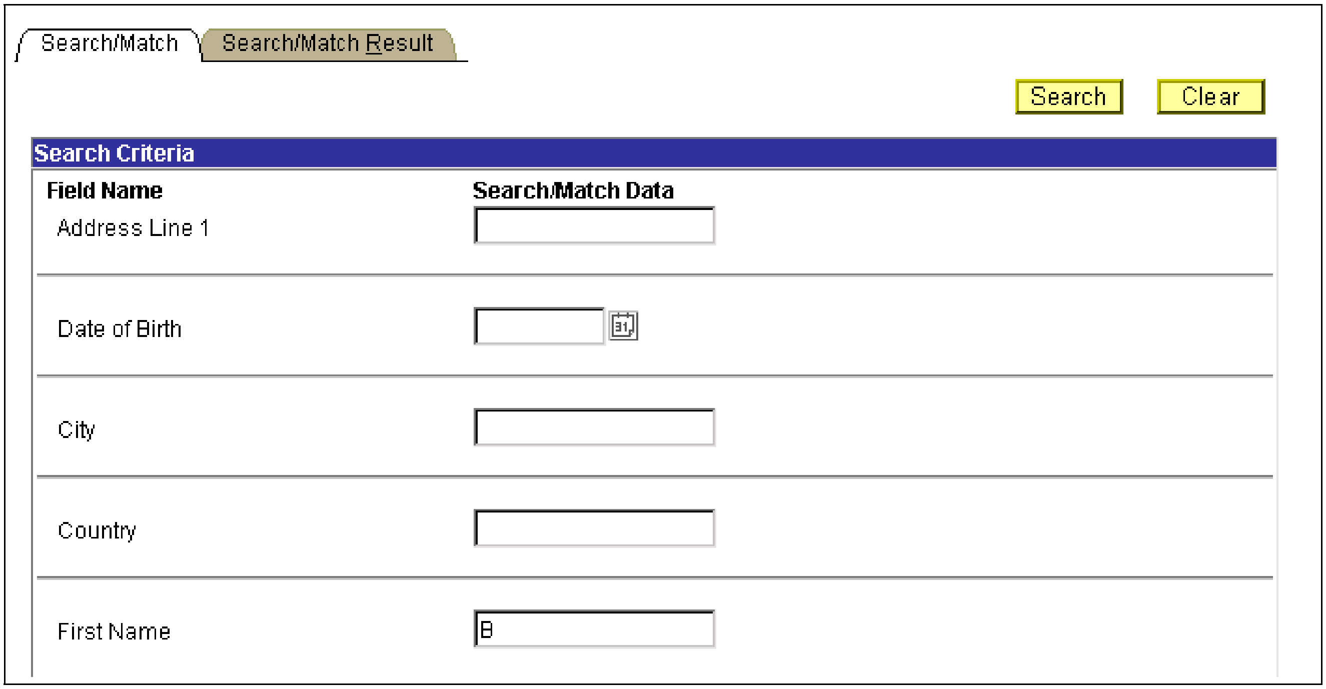
Chapter 4, "Setting Up Search/Match Criteria," page 43

Pages Used for Search/Match

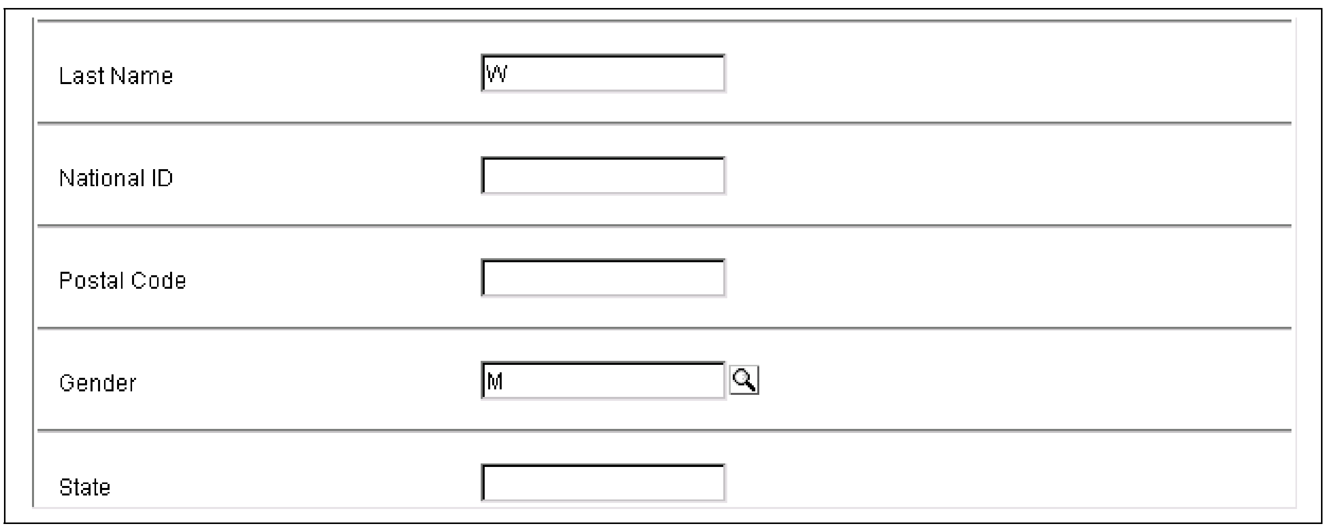
Page Name	Object Name	Navigation	Usage
Search/Match	SEARCH_MATCH	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Inquire, Search Match, Search/Match • Manage Contributor Relations, Manage People, Inquire, Search/Match, Search/Match • Develop Enrollment, Process Applications, Inquire, Search/Match, Search/Match	Specify data for a search.
Search/Match Result	SEARCH_MATCH_RSLT	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Inquire, Search Match, Search/Match Result • Manage Contributor Relations, Manage People, Inquire, Search/Match, Search/Match Result • Develop Enrollment, Process Applications, Inquire, Search/Match, Search/Match Result	View Search/Match results.
Relations With Institution Detail	SEARCH_MATCH_SEC	Click the Relations link on the Search/Match Result page.	Review the individual's relationship to your institution to verify that it is the ID for which you are searching.

Specifying Data for a Search

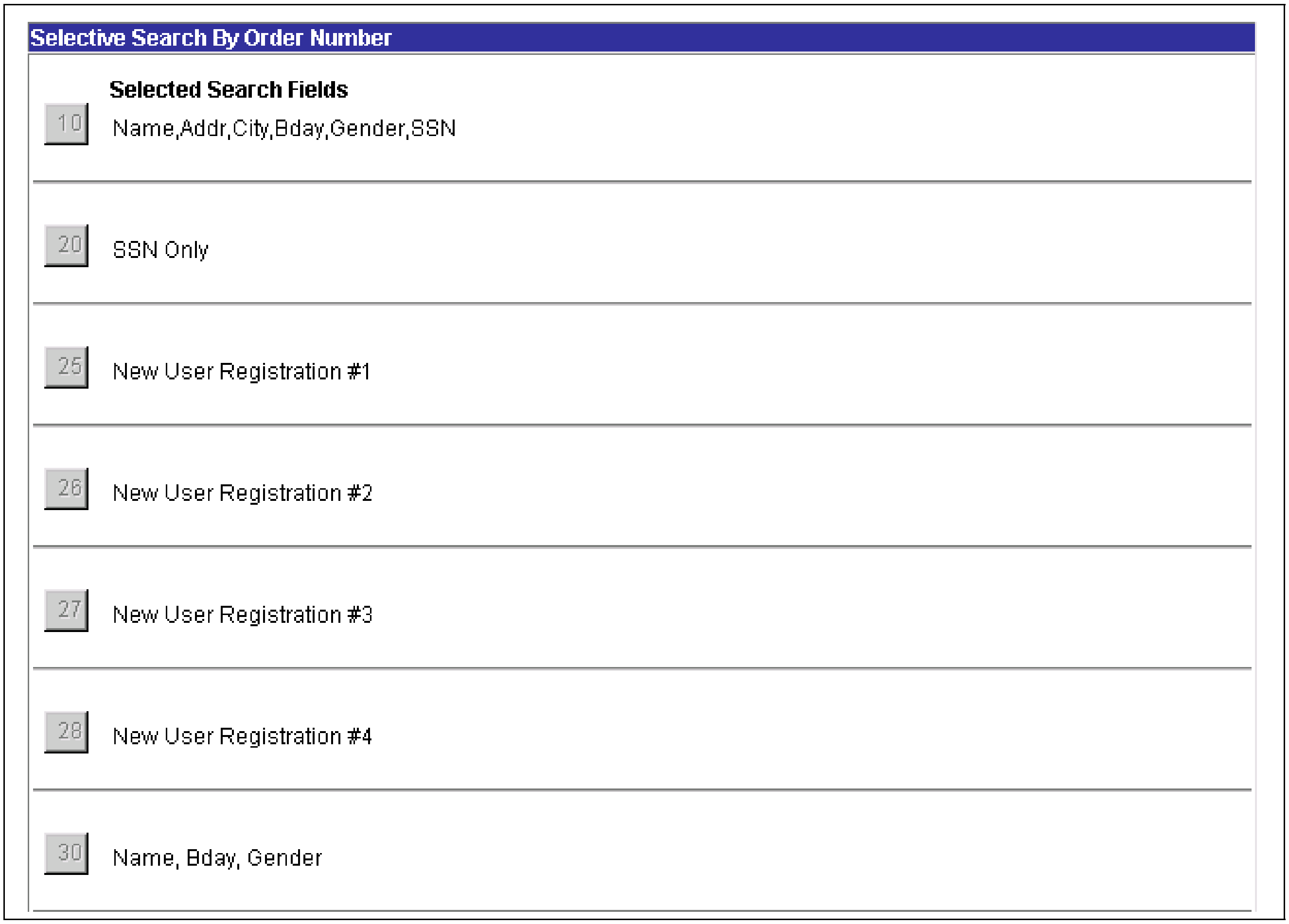
Access the Search/Match page.



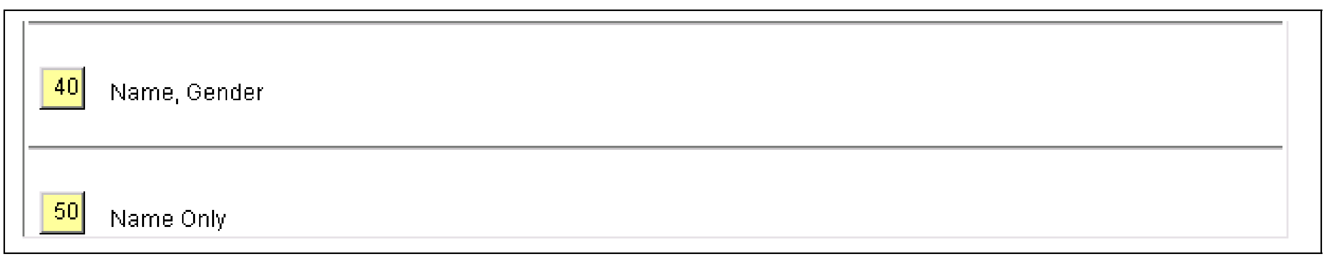
Search/Match page (1 of 4)



Search/Match page (2 of 4)



Search/Match page (3 of 4)



Search/Match page (4 of 4)

Search Criteria

Address Line 1	Enter the first line of the address for which you want the system to search.
Date of Birth	Enter the date of birth for which you want the system to search.
City	Enter the city name (or any set of the first letters of the city name) for which you want the system to search.
Last Name	Enter the last name (or any set of the first letters of the last name) for which you want the system to search.
First Name	Enter the first name, or any set of the first letters of the first name, for which you want the system to search. .

National ID Enter the national ID number (or any set of the first characters of the national ID number) for which you want the system to search.

Gender Specify the gender (*F* for Female, *M* for Male, or *U* for Unknown) for which you want the system to search.

Clear Click to clear all the Search/Match Data field entries.

Search Click to launch a search on all the Search/Match Data values you entered.

Note. When you click Search, the system searches only for the data specified. It does not launch successive level searches as the numbered buttons in the Selective Search Order by Number area do.

Selective Search by Order Number

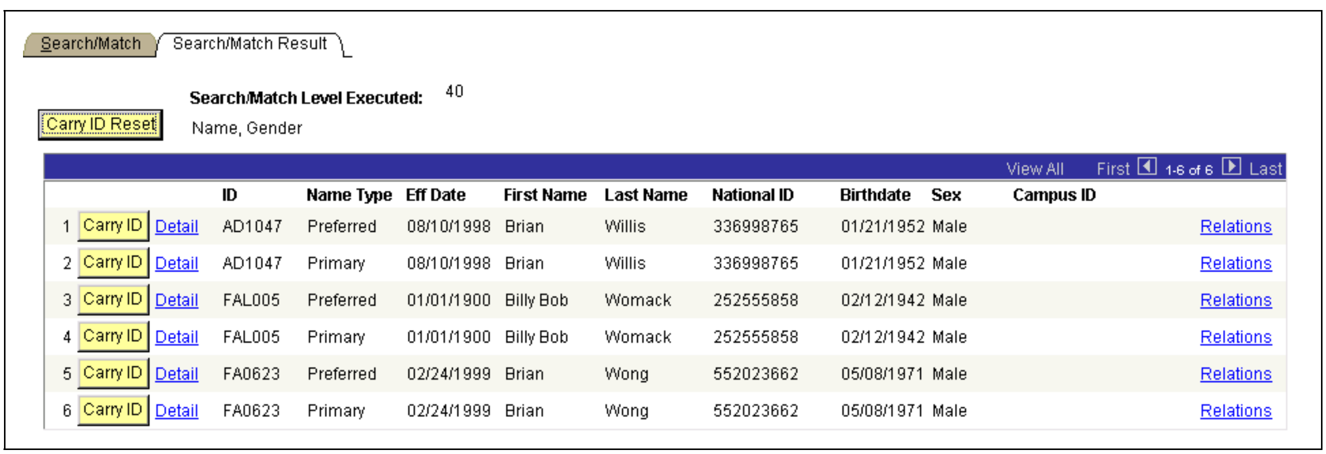
When you enter criteria in the Search/Match fields that collectively match corresponding search orders on the Search/Match criteria page, the Selective Search Order by Number button for each search order becomes available.

Click the order number buttons to conduct the successive level searches that they represent. If you select a lower level search order button and any buttons below it are active, the system conducts the search that you selected and also moves through the subsequent searches.

For example, if the 30, 40, and 50 buttons are available, and you click level 30, the system conducts the level 30 search and moves on to 40 and then to 50 until a match is found. When the search is complete, the system transfers you to the Search/Match Result page.

Viewing Search/Match Results

Access the Search/Match Result page.


Search/Match | Search/Match Result

Search/Match Level Executed: 40

Carry ID Reset | Name, Gender

View All | First | 1-6 of 6 | Last

			ID	Name Type	Eff Date	First Name	Last Name	National ID	Birthdate	Sex	Campus ID	
1	Carry ID	Detail	AD1047	Preferred	08/10/1998	Brian	Willis	336998765	01/21/1952	Male		Relations
2	Carry ID	Detail	AD1047	Primary	08/10/1998	Brian	Willis	336998765	01/21/1952	Male		Relations
3	Carry ID	Detail	FAL005	Preferred	01/01/1900	Billy Bob	Womack	252555858	02/12/1942	Male		Relations
4	Carry ID	Detail	FAL005	Primary	01/01/1900	Billy Bob	Womack	252555858	02/12/1942	Male		Relations
5	Carry ID	Detail	FA0623	Preferred	02/24/1999	Brian	Wong	552023662	05/08/1971	Male		Relations
6	Carry ID	Detail	FA0623	Primary	02/24/1999	Brian	Wong	552023662	05/08/1971	Male		Relations

Search/Match Result page

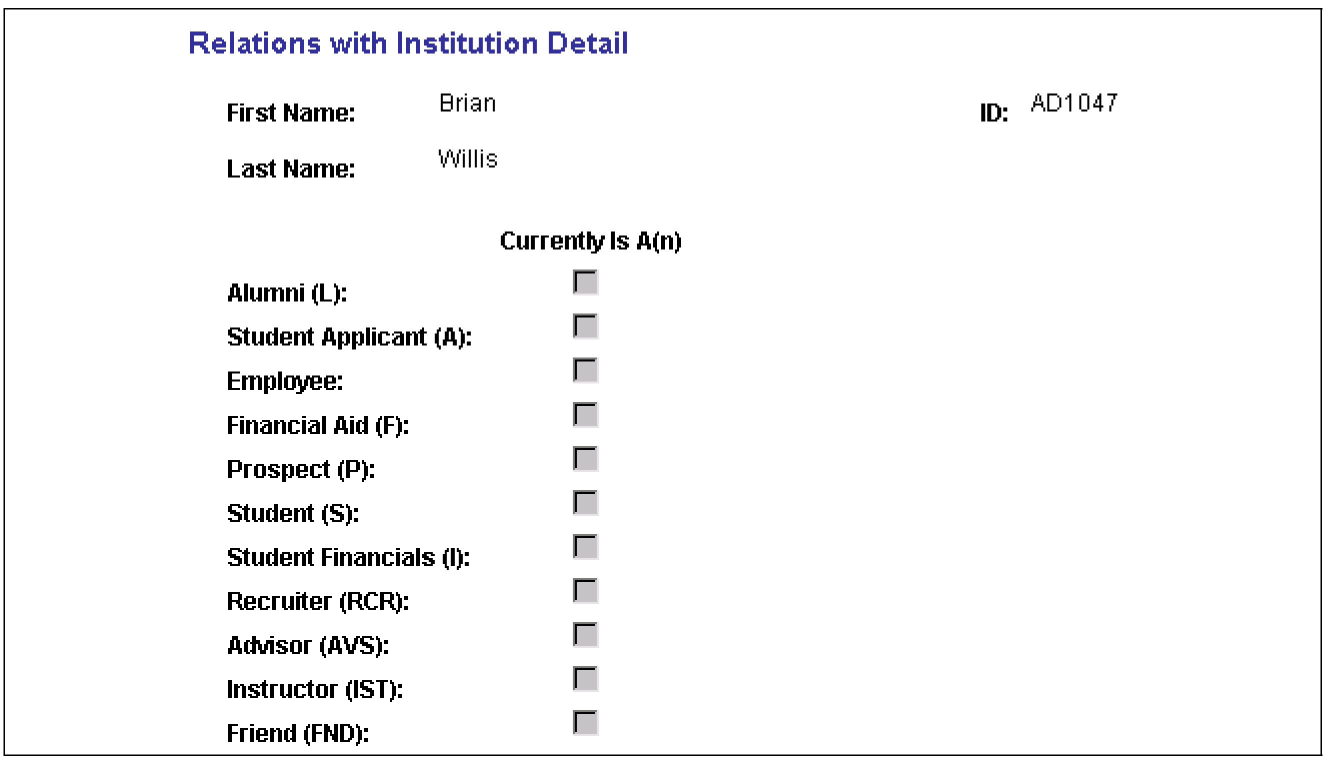
Search/Match Level Executed Indicates the search order level(s) at which results were found.

Carry ID Reset If the system did not find an existing record for the individual, click to add the individual.

	The system clears the Carry ID function so that *New* appears in the ID field of the search box on the next page you access in the *Add New Value* mode.
Carry ID	If the system found an existing record for the individual, click to access that record. The system captures and carries the individual's ID to the ID field of the search box on the next page you access so that you can access the record and review, add, or update data for the individual.
Detail	Click to access the Bio/Demo Data page where you can confirm or view additional information about the individual. The system displays some or all of the following information depending on what is available for each matching record that it finds: ID, name type, effective date, first name, last name, national ID, birth date, sex, (current relation), and campus ID.
Relations	Click to access the Relations With Institution Detail page where you can determine the type of relations the individual has with the institution and further clarify if this is the individual for whom you are searching.

Determining Relations With Institution

Access the Relations With Institution Detail page.



Relations With Institution Detail page

Currently Is A(n)	When selected, indicates that the individual currently has that relation to your institution.

Note. PeopleSoft Contributor Relations uses the abbreviations on this page in its CR search.

See Also

Chapter 32, "Managing Services Data," Tracking Relations With the Institution, page 402

PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook, "Managing Constituent Data," Using CR Search

CHAPTER 20

Maintaining Bio/Demographic Data

This chapter gives an overview of how to manage and maintain bio/demo data about individuals in your database and discusses how to:

- Add people to your database.
- Enter and update basic bio/demo data.
- Manage addresses.
- Enter languages data.
- Enter relationships data.
- Enter religious preferences data.
- Enter emergency contact data.
- Track work experience.
- View bio/demo data reports.

Understanding Bio/Demo Data

Biographic/demographic (bio/demo) data is personal data that distinguishes one individual from another. The most basic of this information is a person's name, address, gender, marital status, and date of birth. However, when managing multitudes of individuals in a database, you will want to know and quickly access more information about each individual. With the bio/demo data pages, you can enter and track an individual's various telephone numbers and addresses (street, email, and URL (Uniform Resource Locator), and you can maintain data about the individual's ethnicity, visa and permits, citizenship and passports, languages, relationships, religious preference, emergency contacts, and work experience.

You can enter and maintain different name types for an individual. With effective dating, you can also maintain and review the history of name changes for each type. For example, when the divorced Mrs. Edith Jones advises your institution that she has remarried and changed her last name to Bramowitz, you can maintain her preferred name, Edith Bramowitz; her former name, Edith Jones; and her maiden name, Edith Brown. Your financials department might need to know when these name changes occurred. They can determine that by reviewing the history of each name type.

You can also enter and maintain different address types for an individual. For example, you might want to enter an individual's home, business, mailing, and permanent address. You can update these addresses as needed and maintain the address change history. In addition to traditional addresses, most individuals have at least one email or web address and several telephone numbers. You can enter and review electronic addresses and phone numbers in your system. After you enter addresses data, you can run processes to apply or remove seasonal addresses, update linked addresses, and search for a specific address for an individual.

Use pages described in this chapter to report the ethnicity of students, staff, and constituents in your campus community. For purposes of reporting to the United States government, students must be placed in one of a limited number of ethnic groups. However, you might want to track ethnicity on a more diverse level. Ethnicity codes enable you to define as many ethnic types as necessary. You can then specify the government ethnic group to which each ethnicity code belongs.

You can set up codes for languages, too, and use those codes to indicate which languages an individual can read, speak, or write and to what degree of proficiency.

You can identify the reciprocal individual relationships that your institution wants to track. Reciprocal relationships include spouses, mother and daughter or son, brother and brother or sister, employer and employee, and so on.

You can use reciprocal relationships to relate an individual in your database to another individual inside or outside of your database. When you relate two individuals, you can set up joint communications for them and maintain one joint address to which to send the joint communication. For example, you can set up a joint communication addressed to Mr. and Mrs. Smith.

You can set the system to automatically verify the marital status that you enter on the Bio/Demo Data page against the relationship you select on the Relationships page. To set automatic marital status verification, select the marital status and associated relationship on the Relationship / Marital Status page that you want the system to verify. If the verification determines that the marital status of either individual is not the specified status for that relationship, a warning message will appear, suggesting that you update the marital status on the Bio/Demo Data page. For example, if you set the marital status of *Married* and the relationship of *Spouse*on the Relationships/Marital Status page, when you select the relationship of *Spouse* on the Relationships page, the system verifies that the marital status of each individual on the Bio/Demo Data page is *Married.* If the marital status of either individual is different from *Married,* the system displays the warning message.

Note. Some default values for relationships are set on the Installation Defaults -- Campus Community page including reciprocal relationships. When the Create Reciprocal Relationship check box is selected on the Installation Default – CC page, the system automatically updates the relationship record for both IDs when you enter and save information on pages in the Relationship component.

By creating codes for religious preferences, you can identify the preference, if any, reported by an individual and track the religious preferences of your campus community.

You should enter the names, addresses, and telephone numbers of people to contact when an individual has an emergency situation. You can enter as many contacts and as many phone numbers for each contact as the individual provides or as your institution requires.

Use U.S. Standard Industry Classification (SIC) and Standard Occupational Classification (SOC) codes to identify and track data about an individual's work experience, including the name of the individual's former employer, employment begin and end dates, and the last rate of pay.

See Also

Chapter 40, "Using PeopleSoft Personal Portfolio Collaborative Application," Exposing Self-Service Bio/Demo Data, page 512

Adding People to Your Database

To add an individual to your system, create a bio/demo record for that individual. When you enter data and save the record, the system assigns the next available sequential ID to that individual and adds the record to your database. Before adding an individual, however, you should run the Search/Match process to determine if a record already exists for that individual.

Warning! Before adding organizations or entering and updating data about them, you must be familiar with PeopleSoft applications, including the Add, Update/Display, Include History, and Correct History modes and the PeopleSoft method of applying effective dates with active or inactive status.

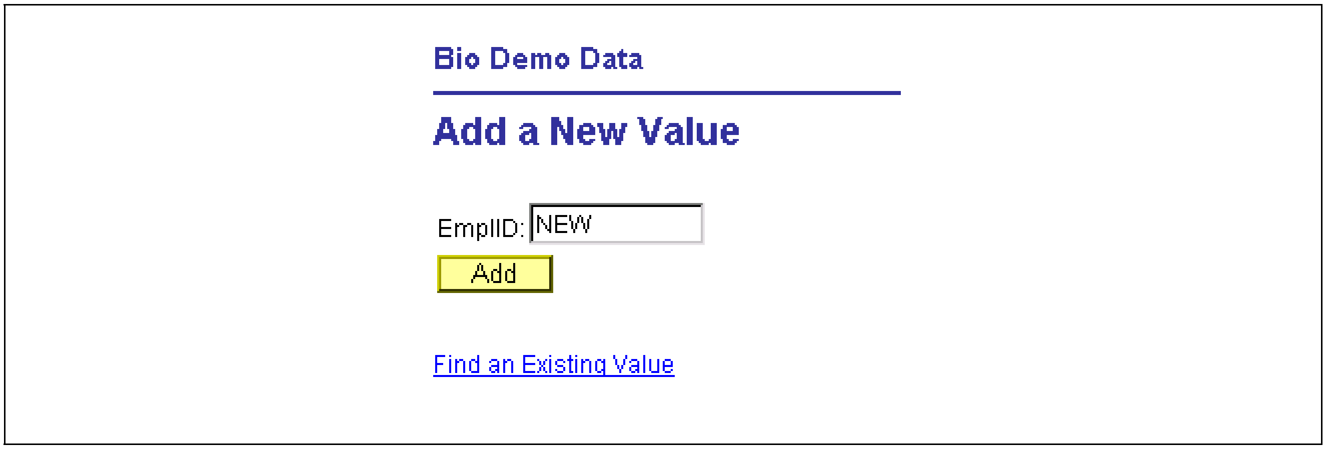
See *PeopleTools PeopleBook, Using PeopleSoft Applications, "Understanding Effective Dates"*

Important! When you add an individual to your database and save the new value, the system performs an automatic search to determine if a duplicate record already exists. This automatic search uses the search/match criteria established by your institution. It notifies you that a duplicate is detected, but it does not give you the opportunity to identify the duplicates. You will want to use the Search/Match feature to help detect and identify duplicates.

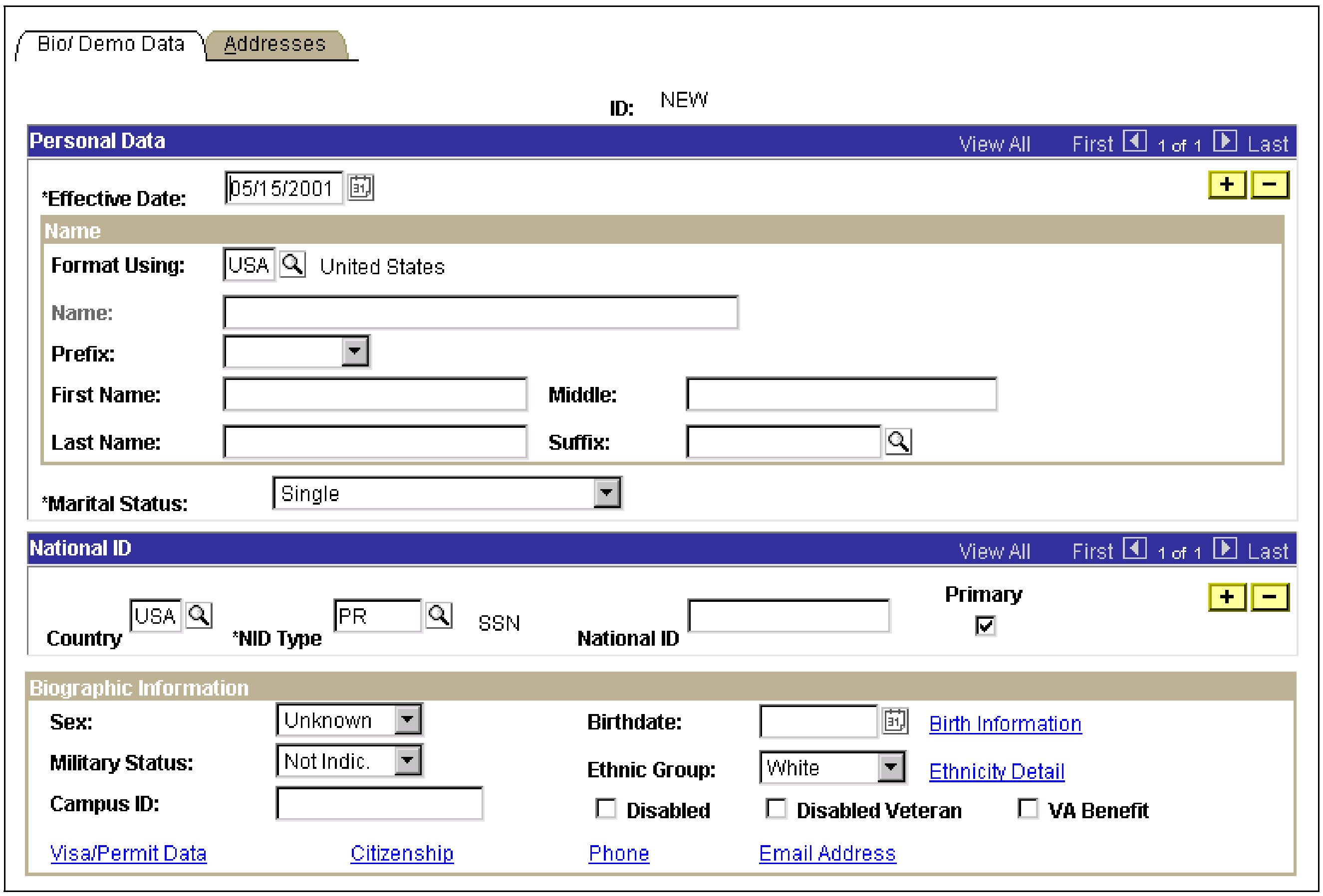
See Chapter 19, "Searching for Records," page 159.

Update bio/demo data for the individual on the same Bio/Demo Data page, but in Update/Display mode after adding the individual.

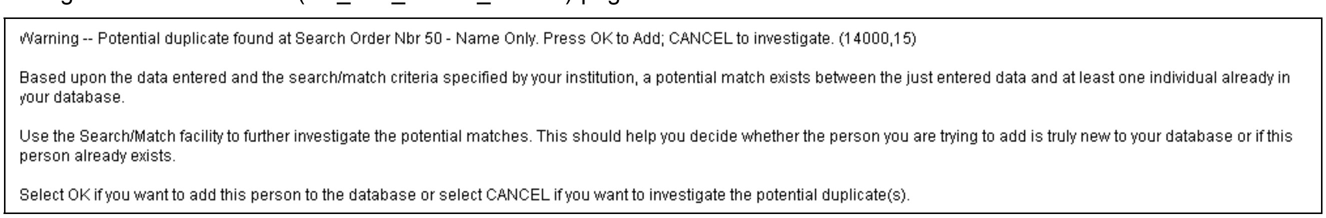
Warning! To take full advantage of the versatility of PeopleSoft Student Administration Solutions names and addresses functionality, use the Bio/Demo Data and Addresses pages to enter or change data. Use PeopleSoft Process Scheduler to schedule the AE PERSDATA (Update Personal Data process) to run nightly. The update process is especially important if your institution has implemented PeopleSoft Human Resources Management and is using the HRMS Personal Data pages. Refer also to your HRMS documentation.



Bio Demo Data – Add a New Value search page



Using the Bio/Demo Data (SA_BIO_DEMO_DATA3) page to add a new record


Warning -- Potential duplicate found at Search Order Nbr 50 - Name Only. Press OK to Add; CANCEL to investigate. (14000,15)

Based upon the data entered and the search/match criteria specified by your institution, a potential match exists between the just entered data and at least one individual already in your database.

Use the Search/Match facility to further investigate the potential matches. This should help you decide whether the person you are trying to add is truly new to your database or if this person already exists.

Select OK if you want to add this person to the database or select CANCEL if you want to investigate the potential duplicate(s).

Example of a “Potential Duplicate Found” warning message

To add an individual to your database:

1. Select Build Community, Bio/Demographic Data, Use, Bio Demo Data.
2. Click the Add a New Value link at the bottom of the Bio Demo Data − Find an Existing Value search page.

   The Bio Demo Data − Add a New Value search page appears with the word *New* in the EmplID field.

   Warning! If you overwrite the word *NEW* in the ID field (EmplID) on the Bio Demo Data – Add a New Value search page, and manually enter an ID for the new person, you will disrupt the autonumbering sequence included with your system. Your system administrator might need to intervene to correct the situation.

   ---

3. Click the Add button.

   The Bio/Demo Data page appears with ID of *NEW.*
4. Enter at least the required data: Effective Date, Name group box data, and Marital Status.

   Warning! If you select Save prior to completing the required data, you will need to select the Correct History mode to continue entering or modifying the effective-dated data.

   ---

5. Select Save.

   The system runs an automatic search based on the entered data and the specified search/match criteria. The search determines if a record for this individual already exists. If a record with this data does not already exist, the system assigns the next available unique ID to the record and adds it to your database.
6. If the system finds an existing record with the data, it displays the "Potential Duplicate Found" warning message.

   You have the option to click OK to add the individual or click Cancel to investigate further.

In most cases, identify the potentially duplicate individuals first to determine if you should add the new one. Click Cancel to cancel out of the message and return to the Bio/Demo Data page. Go to the Search/Match page to run a search and identify the duplicate.

Warning! If you click OK, the system will add the new person even though potential duplicates exist. If this is not what you want, click Cancel.

Entering and Updating Basic Bio/Demo Data

You can enter or update most of the basic bio/demo data about an individual without leaving the page. When you save information on the pages described in this section, the system writes it to the relevant maintenance tables, and updates the same information on other pages where it appears.

This section provides an overview of entering basic bio/demo data, and describes how to:

- Enter basic bio/demo data.
- Enter birth location data.
- Enter ethnicity detail data.
- Enter visa and permit detail data.

- Enter citizenship detail data.
- Enter phone detail data.
- Enter email address detail data.
- Enter addresses data.
- Enter name types.
- Enter address types.
- Enter electronic address data.
- Enter phone number data.
- Enter ethnicity data.

Prerequisites

Before entering or updating basic bio/demo data, design and set up names, addresses, and other foundational elements of PeopleSoft Campus Community. Also set up basic elements for bio/demo data management.

See Also

Chapter 2, "Designing PeopleSoft Campus Community," page 5

Chapter 5, "Setting Up Bio/Demographic Data," page 47

Pages Used to Enter and Update Basic Bio/Demo Data

Page Name	Object Name	Navigation	Usage
Bio/Demo Data	SA_BIO_DEMO_DATA3	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Use, Bio Demo Data, Bio/Demo Data • Build Community, Events, Use, Bio/Demo Data, Bio/Demo Data • Administer Financial Aid, Process Loans, Use, Demographic and Address Data, Bio/Demo Data • Manage Student Records, Manage Academic Records, Use, Quick Admit, Bio/Demo Data	Enter or update an individual's basic biographic and demographic data.
Birth Information	SA_BIRTH_DETAIL	Click the Birth Information link on the Bio/Demo Data page.	Enter or review an individual's birth location data.

Page Name	Object Name	Navigation	Usage
Ethnicity Detail	ETHNICITY_SEC	Click the Ethnicity Detail link on the Bio/Demo Data page.	Enter or review an individual’s ethnicity detail data, including percentages and primary ethnicity.
Visa/Permit Data Detail	VISA_PERMIT_DETAIL	Click the Visa/Permit link on the Bio/Demo Data page.	Enter or review an individual’s visa and permit detail data, including country type, date of issue, duration, issuing authority, and other visa and permit information.
Citizenship Detail	SA_CITIZENSHIP_DTL	Click the Citizenship link on the Bio/Demo Data page.	Enter or review an individual’s citizenship and passport detail data, including country, citizenship status, passport number, issue date, expiration date, and other relevant information.
Phone Detail	SA_PHONE_SEC	Click the Phone link on the Bio/Demo Data page.	Enter or review an individual’s telephone data.
Email Address Detail	SA_EMAIL_ADDR_SEC	Click the Email Addresses link on the Bio/Demo Data page.	Enter or review an individual’s email address data.

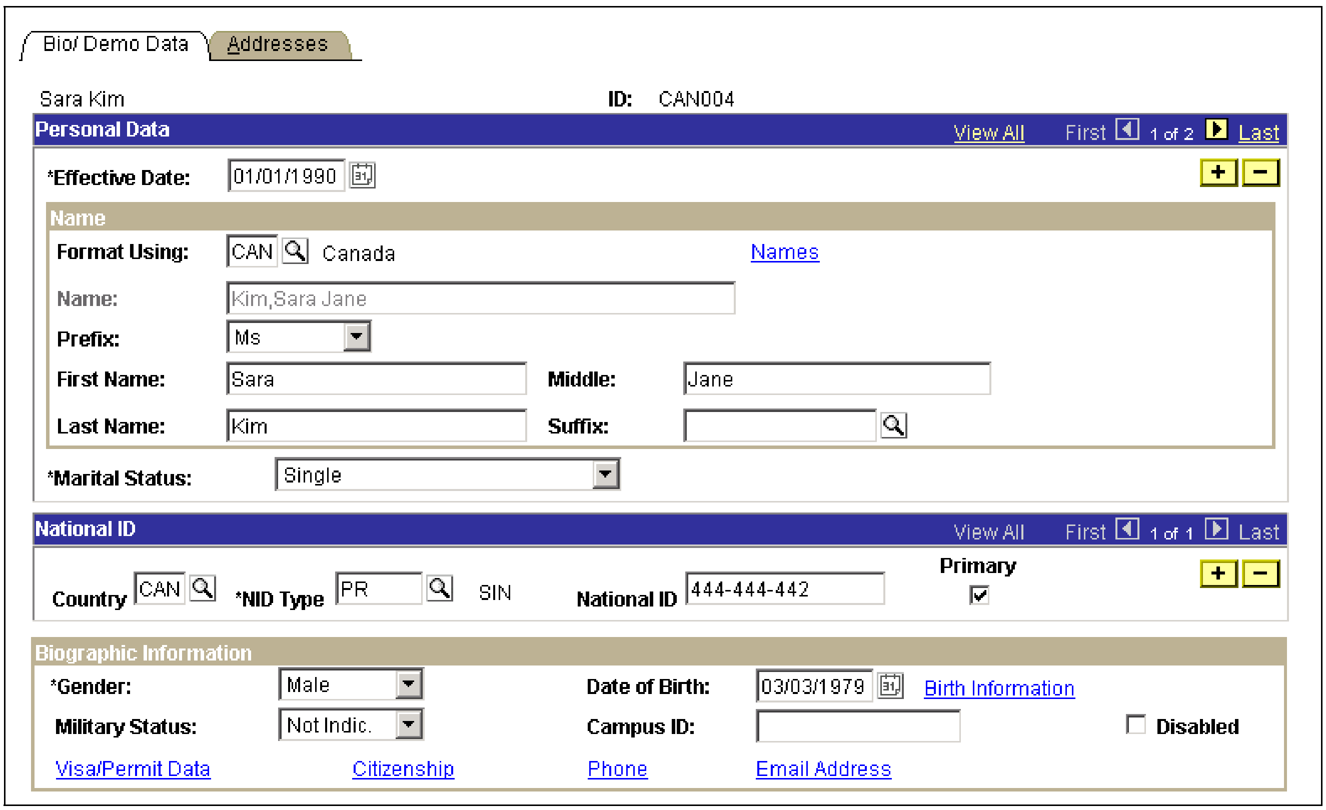
Page Name	Object Name	Navigation	Usage
Bio Demo Data – Addresses	BIO_DEMO_ADDRESSES	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Use, Bio Demo Data, Addresses • Build Community, Events, Use, Bio/Demo Data, Addresses • Manage Contributor Relations, Manage People, Use, Bio Demo Data, Addresses • Manage Student Records, Manage Academic Records, Use, Quick Admit, Addresses • Develop Enrollment, Process Applications, Use, Application Entry, Addresses • Administer Financial Aid, Process Loans, Use, Demographic and Address Data, Addresses	Enter or review an individual's address data.

Page Name	Object Name	Navigation	Usage
Names	NAMES	• Build Community, Bio/Demographic Data, Use, Names, Names • Manage Contributor Relations, Manage People, Use, Names, Names • Develop Enrollment, Manage Recruiters, Use, Names, Names • Develop Enrollment, Process Applications, Use, Names, Names • Develop Enrollment, Recruit Prospective Students, Use, Names, Names • Administer Workforce, Administer Workforce (GBL), Use, Names, Names • Administer Workforce, Administer Workforce (USF), Use2, Names, Names	Enter, or review an individual's name types.
Addresses	ADDRESSES	• Build Community, Bio/Demographic Data, Use, Addresses, Addresses • Manage Contributor Relations, Manage People, Use, Addresses, Addresses • Manage Contributor Relations, Manage People, Workset, Address Inquiry, Addresses • Administer Financial Aid, Canadian Need Analysis, Use, Address Maintenance, Addresses • Manage Student Financials, Maintain Customers, Use, Address Maintenance, Addresses	Enter or review an individual's address types.
Electronic Addresses	E_ADDR_PERS	• Build Community, Bio/Demographic Data, Use, Electronic Addresses, E Addr Pers • Manage Contributor Relations, Manage People, Use, Electronic Addresses, E Addr Pers	Enter or review an individual's email and URL addresses data.

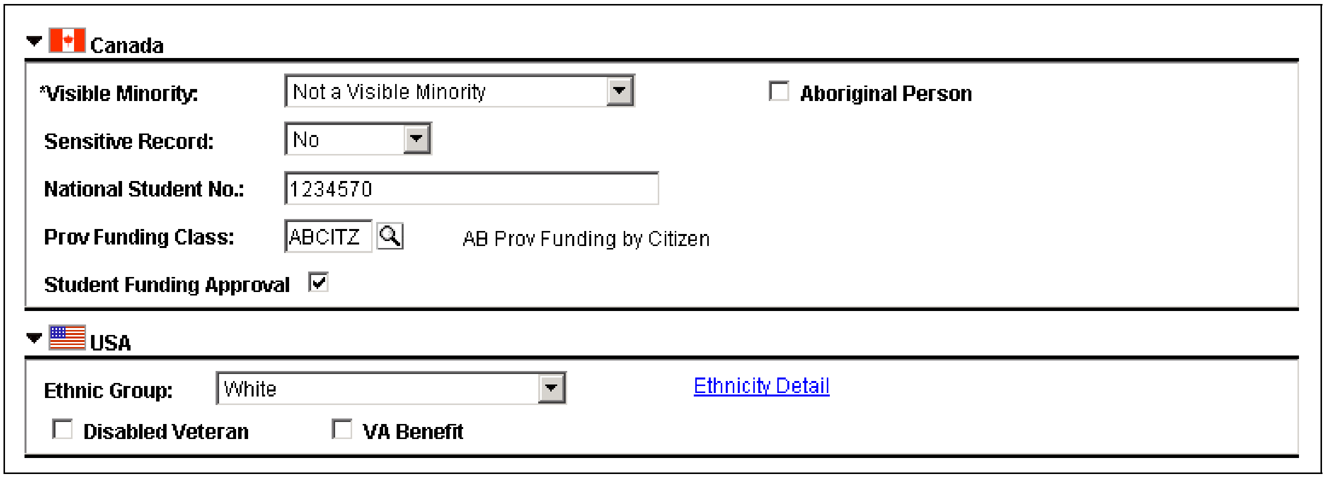
Page Name	Object Name	Navigation	Usage
Phone Numbers	PHONE_PERS	Build Community, Bio/Demographic Data, Use, Phones, Phone	Enter or review an individual's telephone numbers.
Ethnicity	ETHNICITY_DETAIL	• Build Community, Bio/Demographic Data, Use, Ethnicity, Ethnicity • Develop Enrollment, Manage Recruiters, Use, Ethnicity Detail, Ethnicity Detail	Enter or review an individual's ethnicity data, including percentages and primary ethnicity.

Entering Basic Bio/Demo Data

Access the Bio/Demo Data page.



Bio/Demo Data page (1 of 2)



Bio/Demo Data page (2 of 2)

Personal Data

Effective Date

Enter the date when required data (name and marital status) are or will become effective.

Note. If you are changing the individual's name prefix, first, middle, or last name, suffix, or marital status, you *must* enter an effective date.

Format Using

Enter or confirm the country whose name format should be used for this individual. The system displays the fields required for that country as defined in the PeopleCode.

Note. The names data that you enter on the Bio/Demo Data page control how the individual's name appears throughout the system.

Name

When entering the individual to your database for the first time, this field is empty and unavailable.

When entering or updating data for someone who already exists in your database, the individual's name appears, formatted per the Names Table.

Names

Click to access the Names page where you can view or update this individual's name history.

Prefix

Select the title, from the Prefixes page, *(Mr, Ms, Mrs,* or *Dr)* that should precede this individual's name.

First Name

Enter the individual's first name.

Middle

Enter the individual's middle name or initial.

Last Name

Enter the individual's last name.

Suffix

Select the appropriate degree or title, from the Suffixes page, that should follow this individual's name, for example: *Esq, MD, PhD, Jr,* or *Sr.*

Marital Status

The marital status of this individual, for example: *Single, Married,* or *Divorced.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

National ID

Country Enter or confirm the country of this individual's national ID.

If the individual has more than one national ID, you can add them here.

NID Type (national ID type) Enter the national ID type associated with the country for this individual.

National ID Enter the individual's national ID number.

Enter the number with or without spaces and dashes. When you exit the field, the system formats the number, based on the country and NID type selected.

Primary Select to indicate that this is the primary national ID number that the system should use for this individual. You must indicate a primary national ID.

Biographic Information

Gender Indicate the individual's gender *(Male, Female,* or *Unknown).*

Date of Birth Enter the individual's date of birth.

Birth Information Click to access the Birth Information page where you can view or correct the individual's birth location, birth country, and birth state.

Military Status Indicate the individual's military status, for example: *Active Reserve, No Military Service,* or *Post-Vietnam Era Veteran.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Campus ID You can use this to store a one-card number or other type of key identifying information if necessary. Campus ID is included on the search pages throughout your system. Campus ID is optional.

Disabled Select to indicate that the individual is disabled.

For the U.S., selecting this field typically means that official documentation has been issued by the state or federal government proclaiming that the individual is disabled, affording them certain privileges and requiring that your institution complies with requirements of the federal Americans with Disabilities Act (ADA) on their behalf.

For Canada, this field indicates whether the student is a person with a disability, as reported by the student.

Visa/Permit Data Click to access the Visa/Permit Data Detail Data page where you can enter, update, or correct details including country type, date of issue, duration, issuing authority, and other visa/permit information.

Citizenship	Click to access the Citizenship Detail page where you can enter, update, or correct citizenship and passport details including country, citizenship status, passport number, issue date, expiration date, and other relevant information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Phone	Click to access the Phone Detail page where you can enter, update, or correct phone information for this individual.
Email Address	Click to access the Email Address Detail page where you can enter, update, or correct email information for this individual.

(CAN) Canada

The following information is specific to users with an installed country of *Canada.*

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Reviewing Your Installation Setup and System Defaults," Selecting Country Specific Information.

Visible Minority	Indicate whether the student is a member of a visible minority group.
Aboriginal Person	Select this check box to indicate that the person is Aboriginal.
Sensitive Record	Define whether the student's record is sensitive, and therefore the system should exclude it from Statistics Canada's mail or telephone surveys.
National Student No. (national student number)	Enter the national student number for the student.
Prov Funding Class (provincial funding classification)	Enter the funding classification by citizenship for grant purposes. This field prompts against the CAN_PROV_FUN record defined for the business unit.
Student Funding Approval	Select this check box to indicate that the student is approved for funding.

(USA) Unites States of America

The following information is specific to users with an installed country of *US.*

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Reviewing Your Installation Setup and System Defaults," Selecting Country Specific Information.

Ethnic Group	Select the federally mandated group that includes the individual's ethnicity designation.
Ethnicity Detail	Click to access the Ethnicity Detail page where you can view or adjust the percentages, enter additional ethnicity rows, and assign the primary ethnicity. Ethnicity details are optional. There is no linkage between the federally mandated ethnic group and the additional details you enter on the Ethnicity Detail page.

Disabled Veteran Selected to indicate that the individual is a veteran who was disabled in the line of duty.

For the U.S., selecting this field typically means that the individual may be entitled to certain benefits.

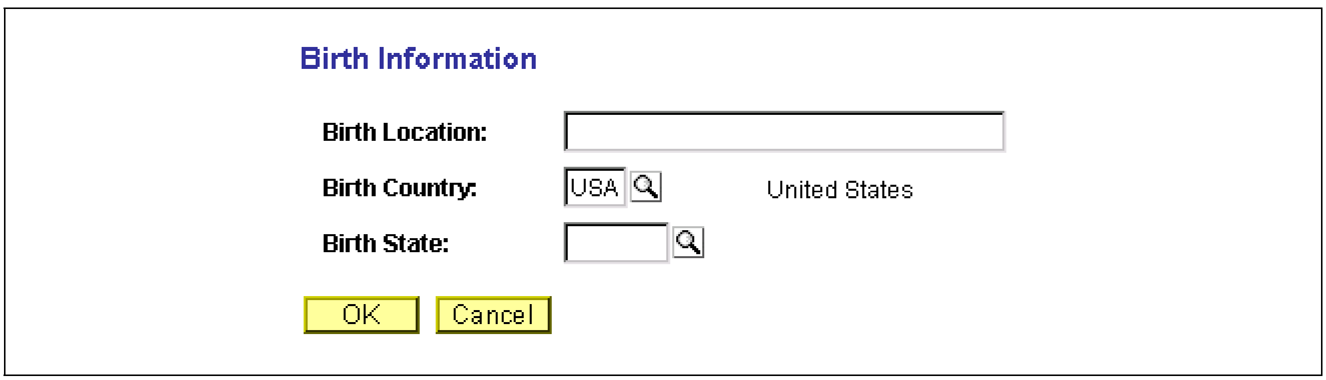
VA Benefit Select to indicate that the individual is receiving veteran benefits from your institution.

In the U.S., the U.S. Veterans Administration requires a hardcopy report of individuals receiving veteran's benefits from your institution. When the VA Benefit check box is selected, the system includes this individual when that report is run.

See *PeopleSoft 8 SP1 Student Records PeopleBook*, "Consolidating and Reporting Academic Statistics," Producing Veteran Reports.

Entering Birth Location Data

Access the Birth Information page.



Birth Information page

Birth Location Enter the location where this individual was born. You can enter the hospital name, county, street address, and so on.

Birth Country Select the country where the individual was born.

Birth State Select the state, province, or equivalent location where the individual was born.

Entering Ethnicity Detail Data

Access the Ethnicity Detail page.

Ethnicity Detail page

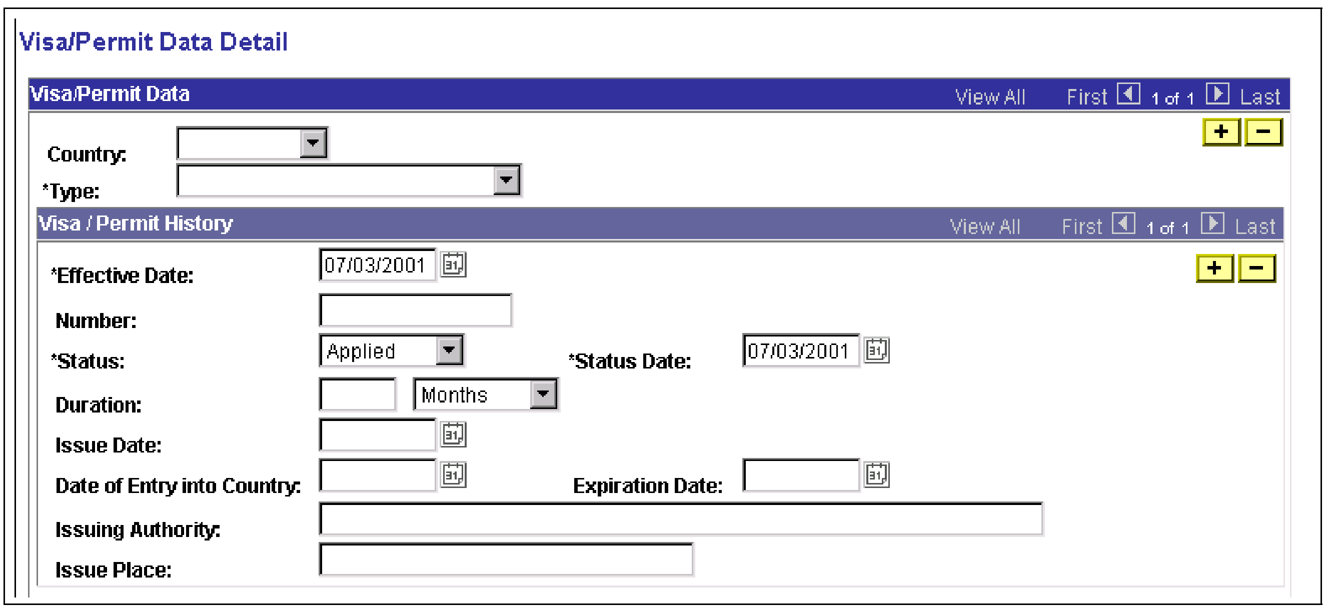
Information that you enter here is the same as the data you enter on the Ethnicity page. When you enter data here, and then return to and save the Bio/Demo Data page, the system updates the same data on the Ethnicity page.

See Also

Chapter 20, "Maintaining Bio/Demographic Data," Entering Ethnicity Data, page 191

Entering Visa and Permit Detail Data

Access the Visa/Permit Data Detail page.



Visa/Permit Data Detail page

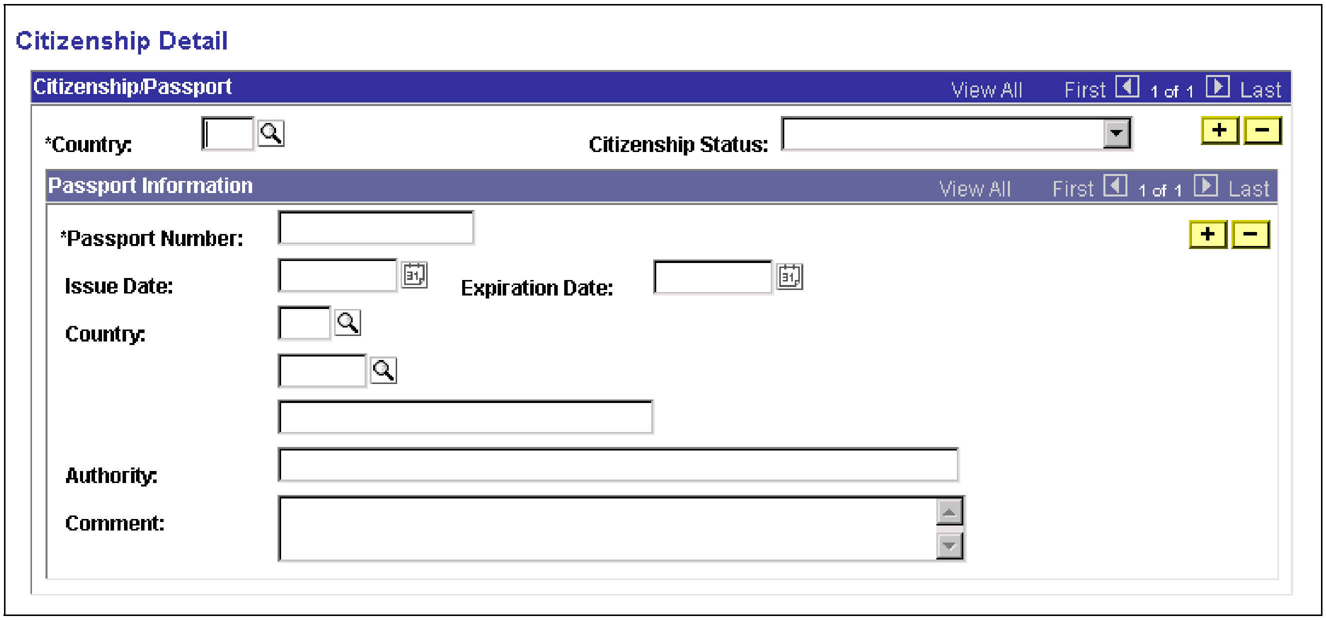
Information that you enter here is the same as the data you enter on the Visa/Permit Data page. When you enter data here and then return to and save the Bio/Demo Data page, the system updates the same data on the Visa/Permit page.

See Also

Chapter 29, "Managing Identification Data," Entering Visa and Permit Data, page 368

Entering Citizenship Detail Data

Access the Citizenship Detail page.



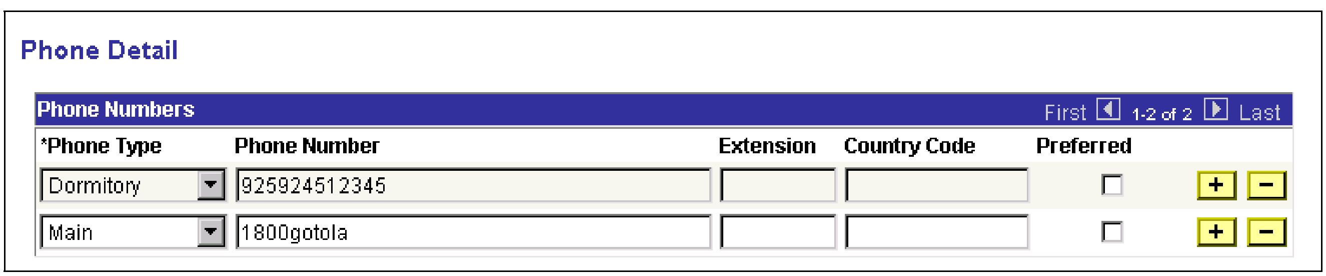
Citizenship Detail page

Information that you enter here is the same as the data you enter on the Citizenship/Passport page. When you enter data here and then return to and save the Bio/Demo Data page, the system updates the same data on the Citizenship/Passport page.

See Chapter 29, "Managing Identification Data," Entering Citizenship and Passport Data, page 365.

Entering Phone Detail Data

Access the Phone Detail page



Phone Detail page

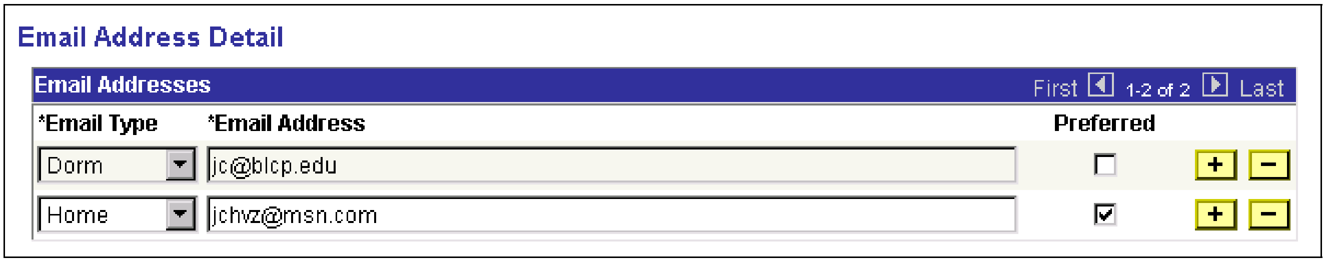
Information that you enter here is the same as the data you enter on the Phone Numbers page. When you enter data here and then return to and save the Bio/Demo Data page, the system updates the same data on the Phone Numbers page.

See Also

Chapter 20, "Maintaining Bio/Demographic Data," Entering Phone Number Data, page 190

Entering Email Address Detail Data

Access the Email Address Detail page.



Email Address Detail page

Information that you enter here is the same as the data you enter on the Electronic Addresses page. When you enter data here and then return to and save the Bio/Demo Data page, the system updates the same data on the Electronic Addresses page.

See Also

Chapter 20, "Maintaining Bio/Demographic Data," Entering Electronic Address Data, page 189

Entering Addresses Data

Access the Bio Demo Data – Addresses page.

Addresses page

Information that you enter here is the same as the data you enter on the Addresses (Types) page. When you save data here, the system updates the same data on the Addresses (Types) page.

See Also

Chapter 20, "Maintaining Bio/Demographic Data," Entering Address Types, page 187

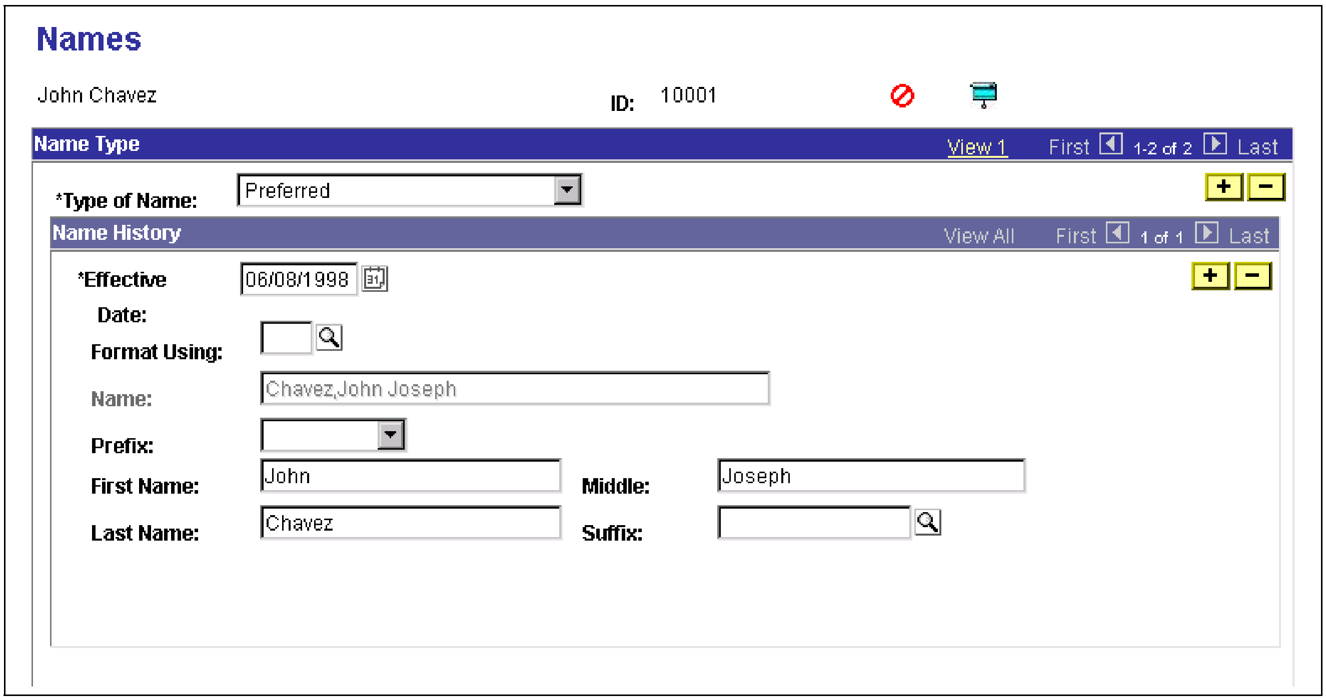
Chapter 20, "Maintaining Bio/Demographic Data," Entering Seasonal Addresses, page 194

Chapter 20, "Maintaining Bio/Demographic Data," Updating Linked Addresses, page 196

Chapter 20, "Maintaining Bio/Demographic Data," Updating Linked Addresses, page 196

Entering Name Types

Access the Names page



Names page

Note. Information that you enter here is the same as the name data you enter on the Bio/Demo Data page. When you save data here, the system updates the same name data on the Bio/Demo Data page.

See Chapter 20, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data, page 173.

Name Type

Type of Name The type of name (for example, *Primary, Preferred, Former,* or *Maiden*) to view or update for this individual.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Name History

Format Using — The country whose name format should be used for this individual. The system displays the fields required for that country as defined in the Country – Address Format page.

Name — If you are entering the individual to your database for the first time, the Name field is empty and unavailable. If you are entering data for someone who already exists in your database, that individual's name appears in the Namefield, formatted according to the Names Table.

Prefix — The title, from the Prefixes Table page, that should precede this individual's name (*Mr, Ms, Mrs, Dr,* and so on).

First Name — The individual's first name.

Middle — The individual's middle name or initial.

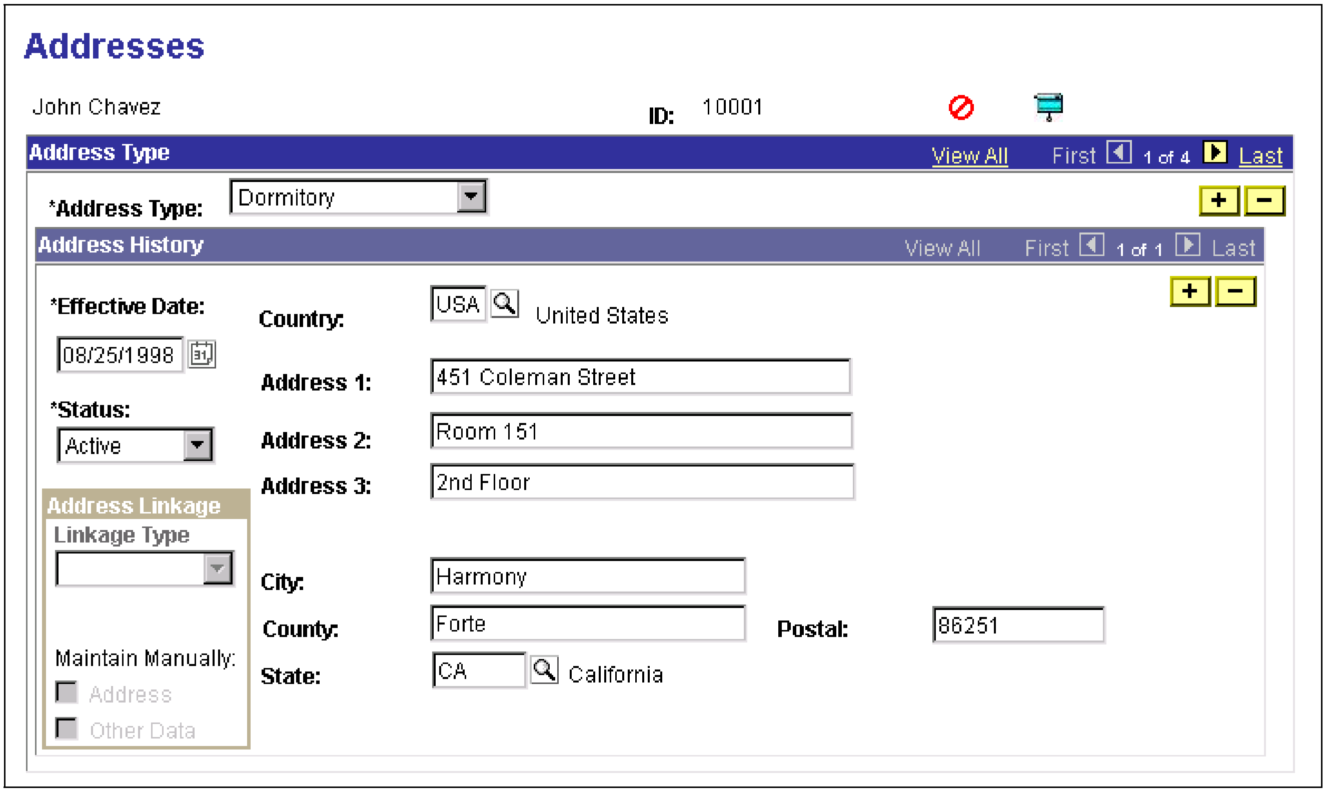
Last Name — The individual's last name.

Suffix — The appropriate degree, title, or generation indicator, from the Suffixes Table page, that should follow this individual's name, if any (*Esq, Jr, MD, PhD, Sr,* and so on).

(lookup suffix) — Click the Lookup Suffix button to access the Lookup Suffix search page, where you can search for a suffix or view a list of suffixes defined on the Suffixes Table page.

Entering Address Types

Access the Addresses page.



Addresses page

Note. Information that you enter here is the same as the address data you enter on the Bio/Demo Data – Addresses page. When you save data here, the system updates the same address data on the Bio/Demo Data – Addresses page.

See Chapter 20, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data, page 173.

Address Type

Address Type The type (for example, *Home, Mailing,* or *Business*) that describes this address.

Address types are delivered with your system as translate values. Except for the types of *Home* and *Mail,* which should *not* be modified, you can modify these translate values.

Address History

Country The country whose address format should be used for this individual. The system displays the fields required for that country as defined on the Country – Address Format page.

Warning! You should enter only present and future effective dates for addresses. Do not enter backdated effective dates, especially for the addresses specified on Installation Table – SA Options page (*Home* and *Mailing*, if you have not altered the defaults). Entering an effective date that predates the original effective date causes the creation of a new row with no names data on PERSONAL_DATA.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Reviewing Your Installation Setup and System Defaults”.

Address Linkage

The address linkage feature enables you to link an address type to a campus location or organization location. You can also specify whether the linked data should be maintained manually, in which case the update linked addresses process, or any other automatic update process, will bypass the information. Address linkage fields are available only when you add and address.

Linkage Type The type of location linkage *(Location* or *Organization)* that applies to this address.

Address Select to indicate that the address should be maintained manually and the system should bypass this address in the update linked addresses process or other automatic update process.

Other Data Select to indicate that other data (entered on the detail pages) should be maintained manually and the system should bypass this data in the update linked addresses process or other automatic update process.

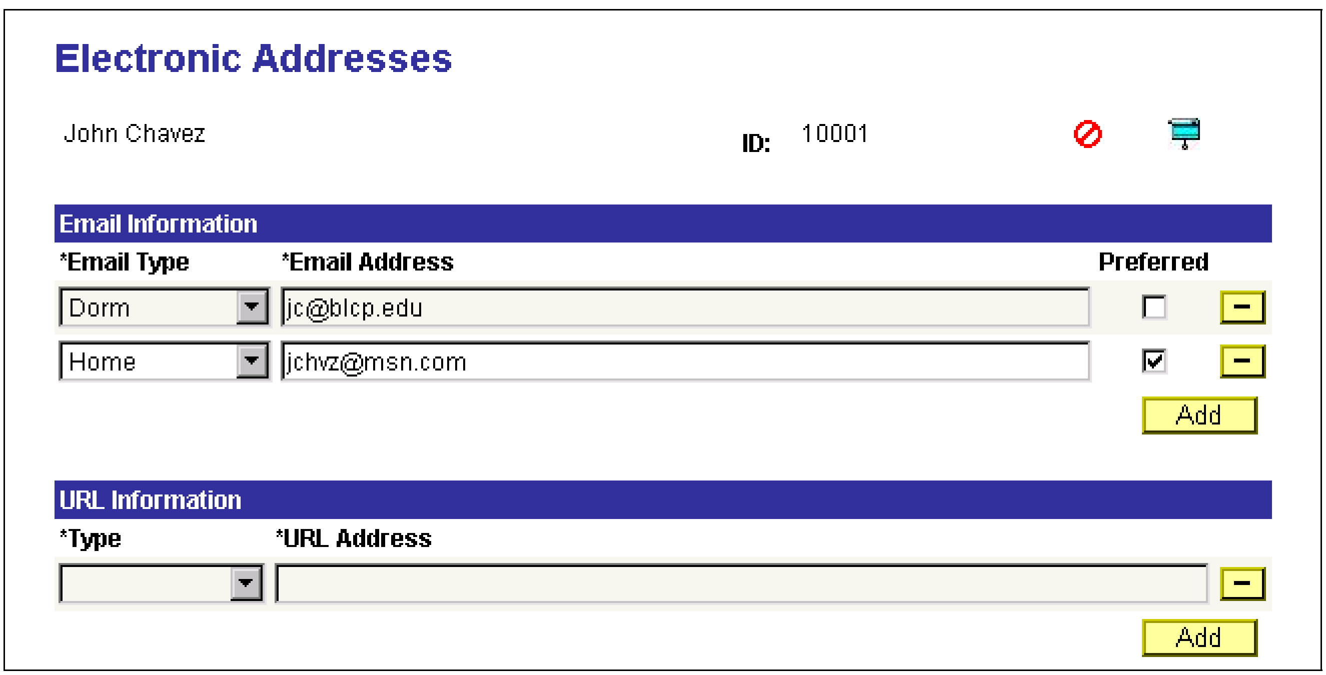
Note. When you update an address that is linked to a campus location or organization, the address is not changed for the individual until you run the update linked address process from the Updating Linked Addresses page.

See Chapter 20, “Maintaining Bio/Demographic Data,” Updating Linked Addresses, page 196.

See Chapter 26, “Managing Communications,” page 269.

Entering Electronic Address Data

Access the Electronic Addresses page.



Electronic Addresses page

Note. Information that you enter here is the same as the email address data you enter on the Email Address Detail page. When you save data here, the system updates the same email address data on the Email Address Detail page.

See Chapter 20, “Maintaining Bio/Demographic Data,” Entering Email Address Detail Data, page 184.

Email Information

Email Type

The type (for example, *Home, Business,* or *Mailing*) that describes this email address.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Email Address

The individual’s email address.

Preferred

Select to indicate this is the individual’s preferred email address—the one to use first when contacting this individual. An individual may have only one preferred email address.

URL Information

Type

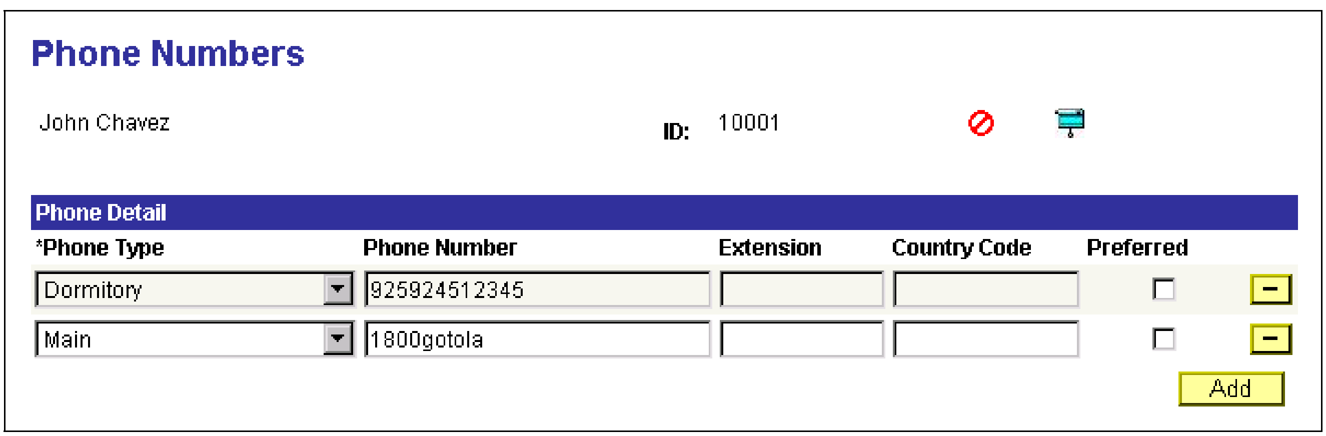
The type *(Home, Business,* or *Mailing)* that describes this electronic address or URL address.

URL Address

The individual’s URL (Uniform Resource Locator) or home page address.

Entering Phone Number Data

Access the Phone Numbers page.



Phone Numbers page

Note. Information that you enter here is the same as the phone numbers data you enter on the Phone Detail page. When you save data here, the system updates the same phone numbers data on the Phone Detail page.

See Chapter 20, “Maintaining Bio/Demographic Data,” Entering Phone Detail Data, page 184.

Phone Type

Select the type (for example, *Home, Business,* or *Mailing*) that describes this telephone number.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Phone Number

Enter the telephone number, including area code, for this individual.

Extension

Enter the individual's direct extension, if any.

Country Code

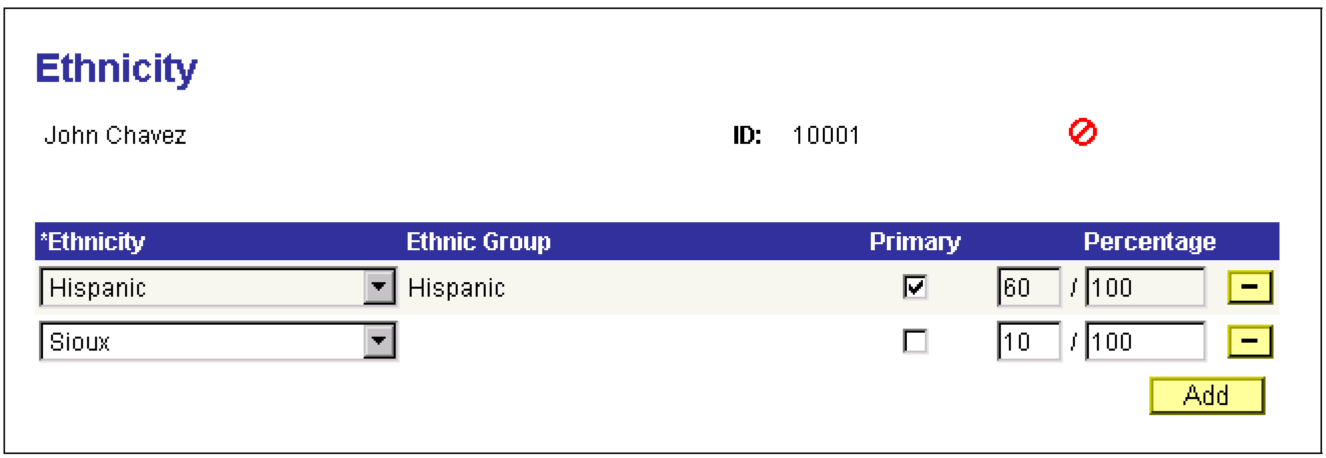
Enter the country code, if required to complete the call.

Preferred

Select to indicate this is the individual's preferred phone number—the one to use first when contacting this individual. An individual may have only one preferred phone number.

Entering Ethnicity Data

Access the Ethnicity page.



Ethnicity page

Ethnicity

Select the ethnicity claimed by this individual.

Ethnic Group

The system displays the U.S. Government ethnic group, from the Ethnicity Table page, associated with the specified ethnicity.

Note. There is no linkage between the federally-mandated Ethnic Group and the additional details that you enter here. The additional ethnicity data is for your institution's information only.

Primary

Select to indicate that the individual claims this as his or her primary ethnicity.

Percentage

Enter the proportion of ethnicity, expressed in a valid numerator and denominator ratio not exceeding a total of one. For example, if the individual claims to be three quarters Hispanic you could enter 3/4 or 75/100. However, if she says she is 110% Shoshone, the most you can enter is the equivalent of one or 100% (100/100). The total for each ethnicity cannot total more than one. There are no system restrictions on the sum of all the ratios together. You could enter 50/100 Hispanic, 50/100 Cherokee, and 50/100 South American, for a total of 150/100.

Managing Addresses

This section provides an overview of managing addresses, and describes how to:

- Enter seasonal addresses.
- Process seasonal addresses.
- Update linked addresses.
- Search for addresses.
- View addresses and address change history.

Understanding Address Management

Some of your faculty or constituents may routinely relocate and work from a different address. Maybe a student goes to his family's ski lodge every winter break, or a staff member volunteers out of state each summer. Using the Seasonal Addresses feature, you can track those temporary addresses to stay in contact with those individuals while they are away. You enter the individual's seasonal address data with the appropriate begin and end dates. Then you run the seasonal addresses process to apply or remove the address, based on those begin and end dates. You can run the process to apply the seasonal address for a specific individual or you can run it to apply or remove all seasonal addresses between certain start and end dates.

When you update an address for a campus location or organization, the campus location or organization address for individuals linked to that location or organization are not changed in your database until you run the Update Linked Addresses process. When you run the process, the system finds all the individuals with whom that campus location or organization is linked and updates the changed address there, too.

For example, when you change an organization's address and run the Update Linked Addresses process, the system will find each of the individuals linked to that organization and change the organization's address.

You can search for addresses for individuals. You can search on address usage, email type, or address type.

For example, if you want to send an email message to an individual at his dorm, search on the email type of *Dormitory.* If you need to send a billing notice, search on the address type of *Billing* or search on the address usage of *Billing.* However, if no address type of *Billing* exists for the individual, you will get no results. If your institution has assigned address usages, use one of the address usage search orders (in this case, Billing, Mailing, Home, Permanent) to have the system search for and find the first appropriate address.

Note. The system searches on active addresses only. If you want to see address history, use the Address Inquiry page.

You can view a list of all addresses in your system for an individual. The list includes all address types that have been entered for the individual. It also includes the individual's current addresses, any previous addresses that are now inactive, and any addresses that are set to become active in the future.

Prerequisites

Before managing seasonal or linked addresses or searching for addresses in your system, enter addresses and address types for the individual.

See Also

Chapter 20, “Maintaining Bio/Demographic Data,” Entering Addresses Data, page 185

Chapter 20, “Maintaining Bio/Demographic Data,” Entering Address Types, page 187

Chapter 20, “Maintaining Bio/Demographic Data,” Entering Electronic Address Data, page 189

Pages Used to Manage Addresses

Page Name	Object Name	Navigation	Usage
Seasonal Address	CC_ADDR_SEASONAL	Build Community, Bio/Demographic Data, Use, Seasonal Addresses, Seasonal Address	Enter a seasonal address for an individual.
Process Seasonal Addresses	RUNCTL_SEASNL_ADDR	Build Community, Bio/Demographic Data, Process, Process Seasonal Addresses, Process Seasonal Addresses	Run the process to apply or remove the seasonal addresses throughout your system.
Update Linked Addresses	RUNCTL_ADDRLINK	• Build Community, Bio/Demographic Data, Process, Update Linked Addresses, Update Linked Addresses • Manage Contributor Relations, Manage People, Process, Update Linked Addresses, Update Linked Addresses	Run the process to update linked addresses throughout your system.
Address Search	ADDRESS_SRCH	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Inquire, Address Search, Address Search • Manage Contributor Relations, Manage People, Inquire, Address Search, Address Search • Manage Student Financials, Maintain Customers, Inquire, Address Search, Address Search	Search for a specific address for an individual.
Address Inquiry	ADDRESSES_DISP	• Build Community, Bio/Demographic Data, Inquire, Address Inquiry, Addresses Disp • Manage Contributor Relations, Manage People, Inquire, Address Inquiry, Addresses Disp	View a list of all addresses in your system for an individual, including address change history.

Entering Seasonal Addresses

Access the Seasonal Addresses page.

Seasonal Addresses page

Address Type Select the type of address that is seasonal for this individual. Only the address types for which the individual has data are available.

Start Date Indicate the date when the seasonal address begins to apply.

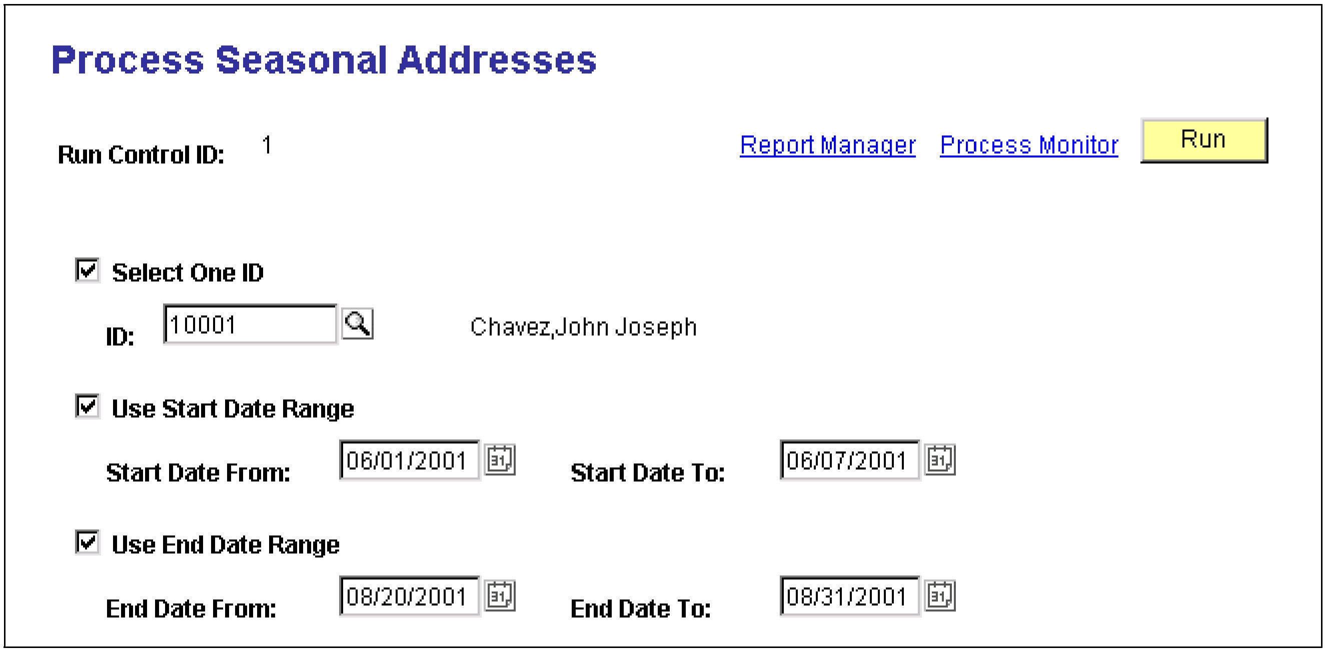
End Date Indicate the date when the seasonal address ceases to apply. When the end date occurs, the system automatically increases the start and end dates by one year and resets the address for the next year.

Country Enter the country whose address formatting should be used for this address.

When you exit the Country field, the address fields appear in the format for the selected country as defined on the country Address Format page.

Processing Seasonal Addresses

Access the Process Seasonal Addresses page.



Process Seasonal Addresses page

Select One ID

Select to indicate that seasonal addresses should be applied or removed for one individual only. You must specify that individual's ID in the ID field.

A date range is not required. However, if the individual has more than one seasonal address, you might want to specify a data range to control the search.

Use Start Date Range

Select to indicate that all seasonal addresses beginning within the specified date range should be applied or removed.

Use End Date Range

Select to indicate that all seasonal addresses ending within the specified date range should be applied or removed.

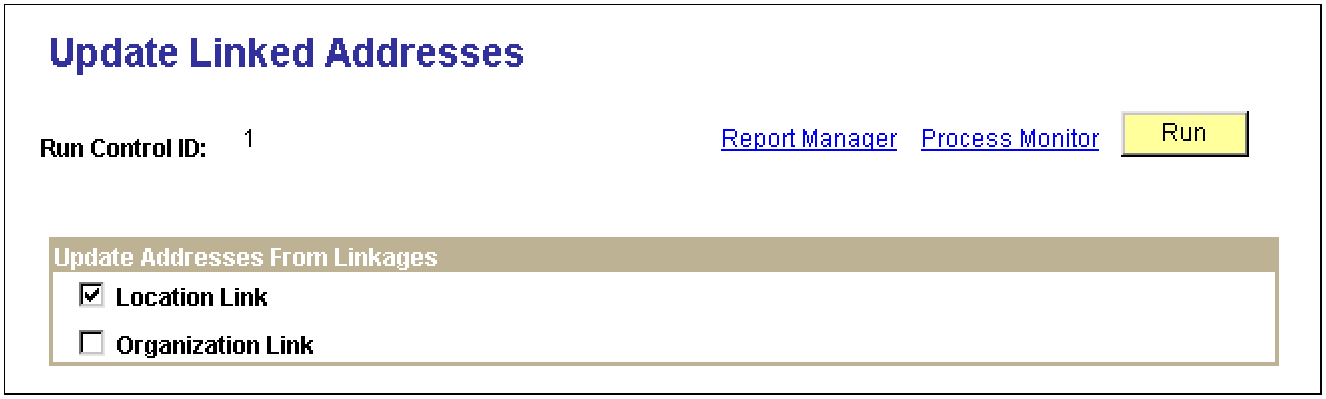
Note. If you specify only one date in a range, the system limits the search to seasonal addresses that begin or end on that specific date.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Using PeopleSoft Process Scheduler"

Updating Linked Addresses

Access Updating Linked Addresses page.



Update Linked Addresses page

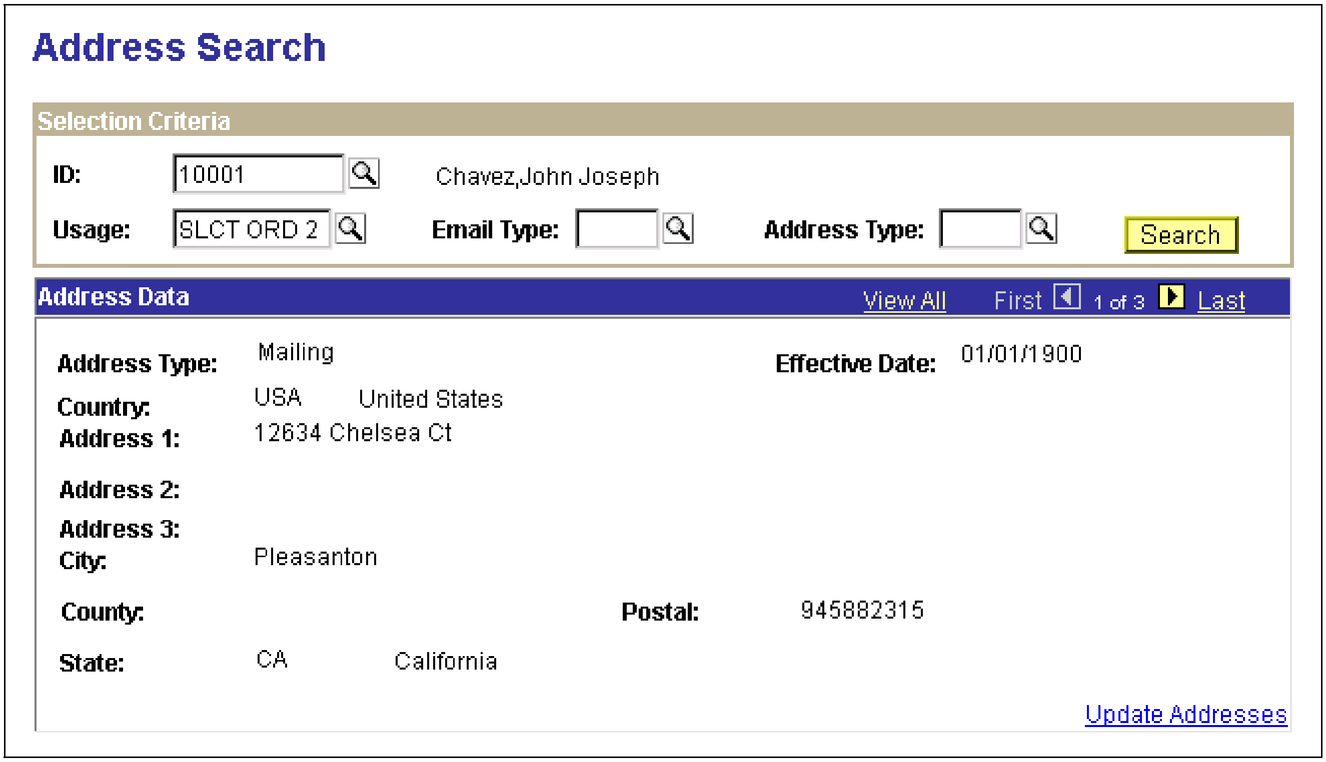
Location Link	Select to indicate that the process should update all addresses linked to locations.
Organization Link	Select to indicate that the process should update all addresses linked to organizations.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler Request page, where you can specify where a process or job runs and the process output format.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Using PeopleSoft Process Scheduler"

Searching for Addresses

Access the Address Search page



Address Search page

ID — Enter the ID of the individual whose address you want to find.

Usage — Select the type of address usage or search order for the system to use in the search.

All address usages in your system are available, for example, *Billing, Admit Letter,* or *Search Order 1.*

Email Type — Select the type of email address, if any, for which the system should search, for example *Home, Dorm,* or *Business.*

Only the existing email types for this individual are available. If no email data exists for the individual, no email types are available.

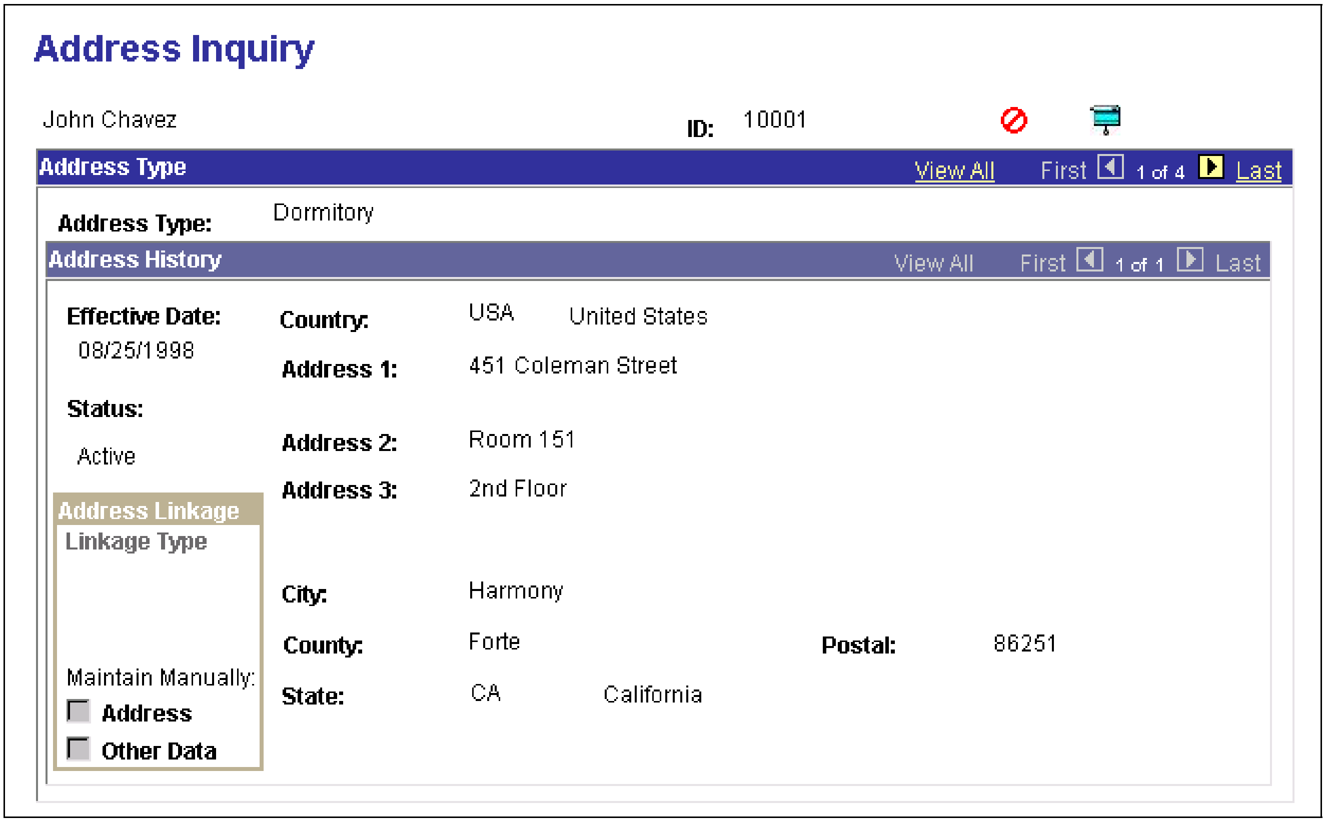
Address Type — Select the type of street address for which the system should search, for example *Home, Dorm,* or *Business.*

All address types are available. If no data of that type exists for the individual, no results are returned.

Update Addresses — Click to access the Addresses page, where you can edit or update this individuals address data.

Viewing Addresses and Address Change History

Access the Address Inquiry page.



Address Inquiry page (1 of 2)

Entering Languages Data

This section provides an overview of entering data to track an individual's ability to read, write, or speak languages.

Prerequisites

Before you can enter languages data, you must define language codes in your system.

See Also

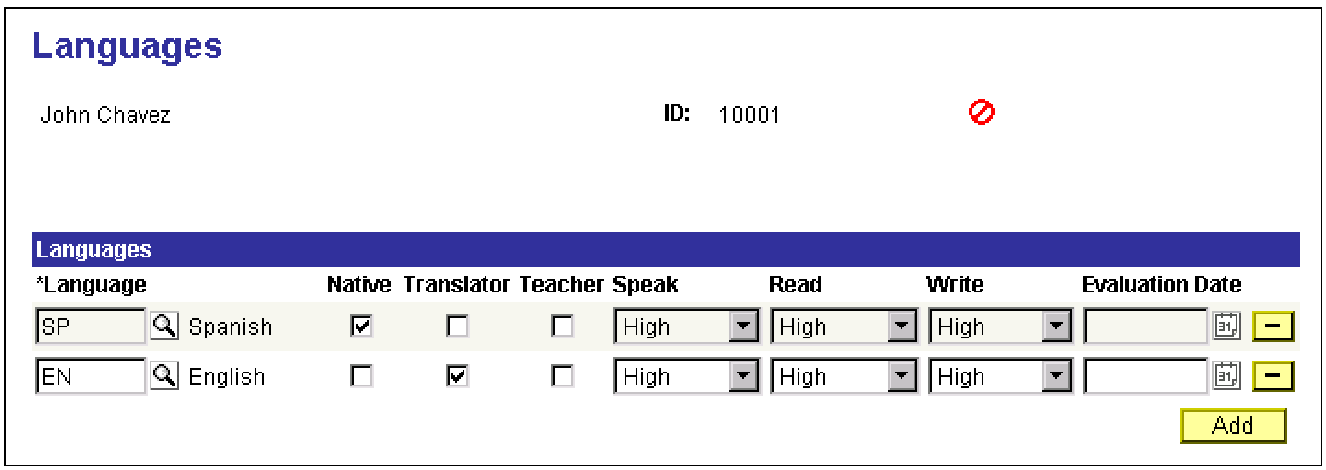
Chapter 5, "Setting Up Bio/Demographic Data," Setting Up Languages, page 48

Pages Used to Enter Languages Data

Page Name	Object Name	Navigation	Usage
Languages	LANGUAGES_PERS	• Build Community, Bio/Demographic Data, Use, Languages, Languages • Develop Enrollment, Manage Recruiters, Use, Languages, Languages • Develop Enrollment, Process Applications, Use, Languages, Languages • Develop Enrollment, Recruit Prospective Students, Use, Languages, Languages	Enter and track an individual's language abilities.

Entering Languages Data

Access the Languages page.



Languages page

Language Enter the language that this individual speaks, reads, or writes.

Native Select to indicate that this is the individual's native, or primary, language.

Translator Select to indicate that the individual can translate or interpret this language.

Teacher Select to indicate that the individual can teach or has taught this language.

Speak Indicate the level of proficiency *(High, Medium,* or*Low)* with which the individual can speak this language.

Read Indicate the level of proficiency *(High, Medium,* or *Low)* with which the individual can read this language.

Write	Indicate the level of proficiency *(High, Medium,* or *Low)* with which the individual can write this language.
Evaluation Date	Enter the date when the individual's levels of proficiency in this language were evaluated, reported, or entered.

Entering Relationships Data

This section provides an overview of entering relationships data, and describes how to:

- Relate one individual to another.
- Identify an individual's legacy relationship to institution.
- Specify communications for the communication recipient relationship.
- Create joint communications relationships.
- Enter relationship detail data.
- Enter relationship addresses.
- View a list of relationships.

See Also

Chapter 26, "Managing Communications," Understanding Joint Communications, page 272

Chapter 32, "Managing Services Data," Tracking Relations With the Institution, page 402

Prerequisites

Before you can enter relationship data, you must define relationships and legacy affiliations. You must also create institutions and academic programs, and create letter codes to identify communications to send to related individuals and set up salutation types to use.

See Also

Chapter 5, "Setting Up Bio/Demographic Data," Setting Up Individual Relationships, page 49

Chapter 5, "Setting Up Bio/Demographic Data," Setting Up Relations to the Institution, page 51

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Designing Your Academic Structure"

Chapter 2, "Designing PeopleSoft Campus Community," Defining Salutation Types for Joint Communications, page 28

Chapter 2, "Designing PeopleSoft Campus Community," Reviewing PeopleSoft Campus Community Installation Settings, page 6

Chapter 13, "Setting Up Communications," Defining or Reviewing Standard Letter Codes, page 115

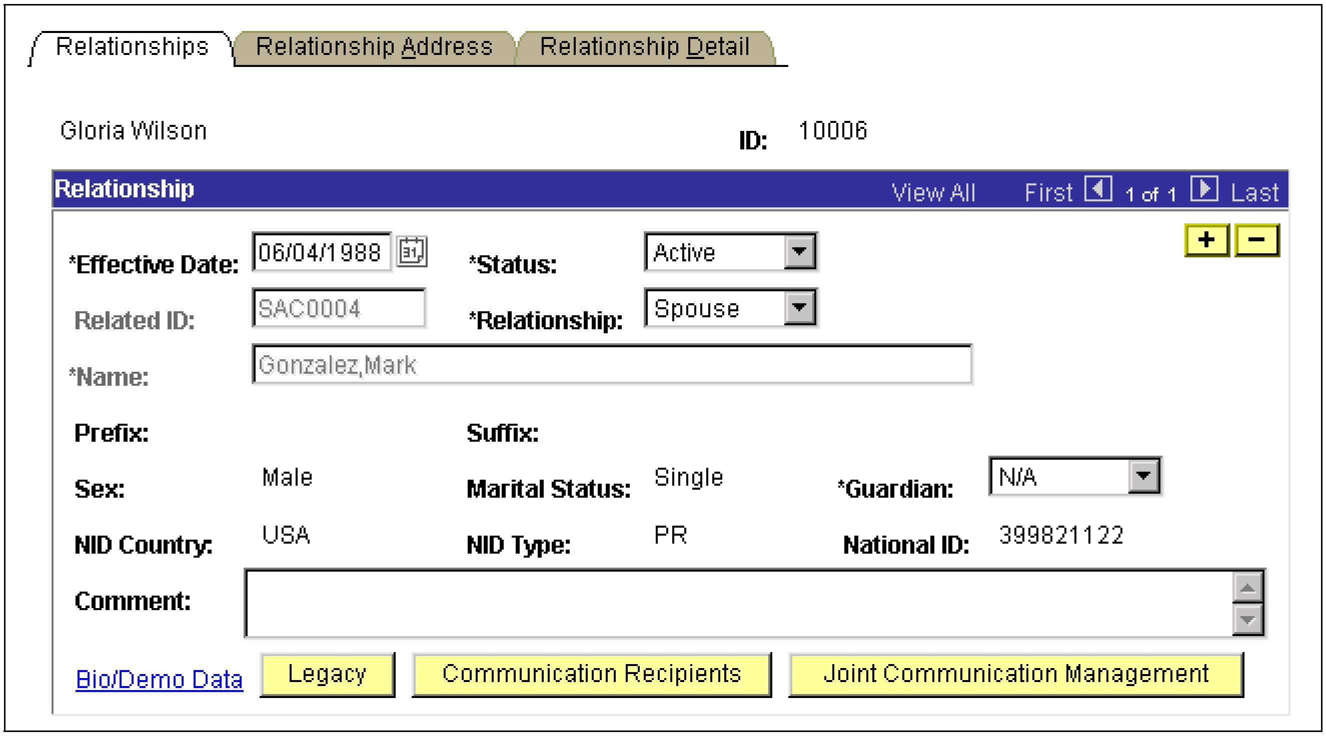
Pages Used to Enter Relationships Data

Page Name	Object Name	Navigation	Usage
Relationships	RELATIONSHIPS	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Use, Relationships, Relationships • Manage Contributor Relations, Manage People, Use, Relationships, Relationships • Develop Enrollment, Process Applications, Use, Relationships, Relationships • Administer Financial Aid, Process Loans, Use, Relationships, Relationships • Develop Enrollment, Recruit Prospective Students, Use, Relationships, Relationships	Enter data to relate one individual to another individual inside or outside of your database.
Legacy Information	LEGACY_SEC	Click the Legacy button on the Relationships page.	Identify a related person's legacy relation with your institution.
Communication Recipient	REL_MLT_RECPNT_SEC	Click the Communication Recipients button on the Relationships page.	Specify the communications for which a copy should also be sent to the related person.
Joint Communication Management	RELATION_SALU_SEC	Click the Joint Communication Management button on the Relationships page.	Create joint communications between two related individuals and establish how their names should appear in the address and salutation. You can also use this page to dissolve joint communications for these individuals.

Page Name	Object Name	Navigation	Usage
Relationship Detail	RELATIONSHIP_DTL	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Use, Relationships, Relationship Detail • Manage Contributor Relations, Manage People, Use, Relationships, Relationship Detail • Develop Enrollment, Process Applications, Use, Relationships, Relationship Detail • Administer Financial Aid, Process Loans, Use, Relationships, Relationship Detail	Enter information about the related person that is of interest to your institution.
Relationship Address	REL_ADDR_DTL	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Bio/Demographic Data, Use, Relationships, Relationship Address • Manage Contributor Relations, Manage People, Use, Relationships, Relationship Address • Develop Enrollment, Process Applications, Use, Relationships, Relationship Address • Administer Financial Aid, Process Loans, Use, Relationships, Relationship Address	Review addresses for the primary individual and review or enter address data for the related individual. If you use the communication recipient feature, this is also where you select the related individual's address to send a copy letter.
Relationship Person to Person − Summary	RELATIONSHIP_SUMRY	Build Community, Bio/Demographic Data, Inquire, Person Relationships, Person Relationship Summary	View a list of relationships for an individual.

Relating One Individual to Another

Access the Relationships page.



Relationships page

Related ID

If the related person is in your database, select the related person's ID. When you select the ID, the system displays the related person's bio/demo data, including the person's name, prefix, suffix, sex, marital status, and primary NID information.

If the related person is not in your database, the name and bio/demo data fields are available so that you can enter the related person's name and bio/demo data.

Note. The Related ID field is available when you are creating the relationship between these individuals for the first time. After you create and save the relationship, when you return to the Relationships page, the system continues to display the related ID and bio/demo data, but you cannot edit or update it from here. If you need to edit or update the related person's bio/demo data, click the Bio/Demo Data link at the bottom of the page. You then determine if you need to update information on the Bio/Demo Data page or reconsider the relationship that you are creating.

Relationship

Specify the related person's relationship (for example, *Mother, Neighbor, Employer,* or *Loan Reference*) to this individual.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Note. If you set up marital status verification on the Relationship / Marital Status page, the system verifies the marital status on the Bio/Demo Data page for each individual against the relationship that you select here. If the marital status of either individual is not the appropriate status for the specified relationship, the system displays a warning message suggesting that you update the marital status for the individuals on the Bio/Demo Data page.

Guardian

Select the legal guardianship that describes the status *(Guardian, N/A, Other, Parent,* or *Self)* of the related person to the primary individual.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Comment

Enter comments to further identify or describe the related person or the relationship between the two individuals.

Bio/Demo Data

Click this link to access the Bio/Demo Data page, where you can edit or update the related person's bio/demo data.

Legacy

Click this button to access the Legacy Information page, where you can identify the related person's legacy relation with your institution.

Communication Recipients

Click to access the Communication Recipient page, where you can specify the communications for which a copy should also be sent to the related person.

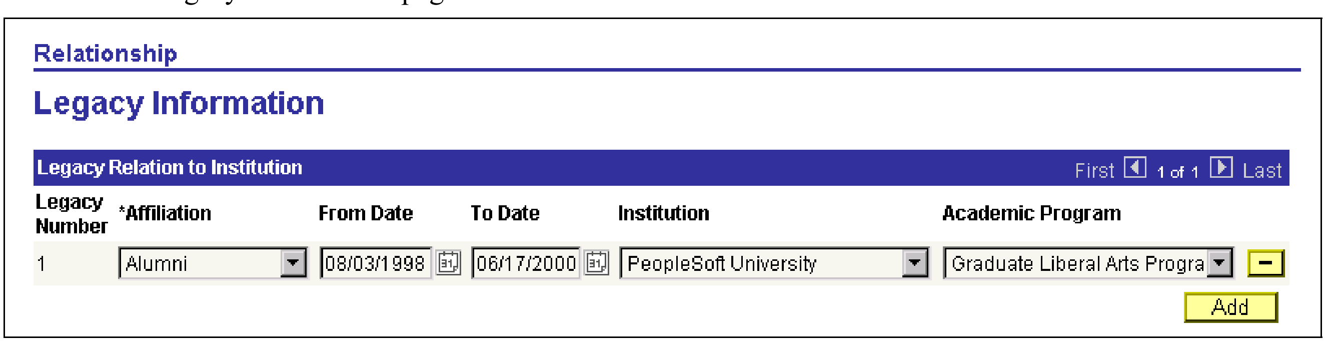
Joint Communication Management

Click to access the Joint Communication Management page, where you can create or dissolve joint communications for these two individuals.

Warning! Individuals can have several relationships in your database, however they can have joint communications with only one of those relationships. For example, you can create a relationship between Gloria Wilson and her husband, Mark Gonzalez, and you can create a relationship between Gloria Wilson and her mother, Maria Wilson. You can create joint communications with either Gloria and her husband or Gloria and her mother. You cannot create joint communications for both.

Identifying an Individual's Legacy Relation to Institution

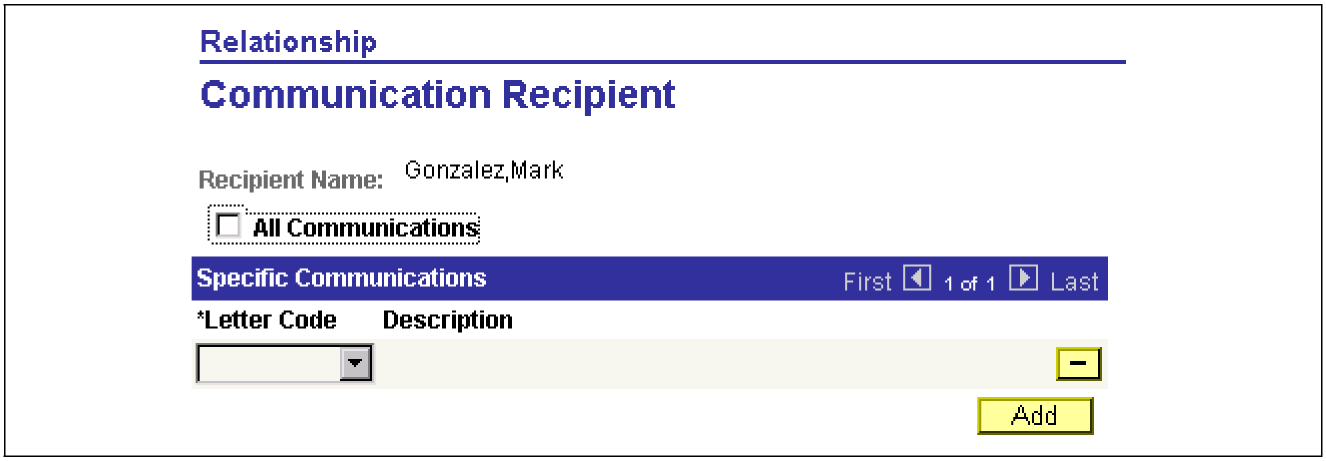
Access the Legacy Information page.



Legacy Information page

Specifying Communications for the Communication Recipient Relationship

Access the Communication Recipient page.



Communication Recipient page

You can create copy letters to send to an individual's related ID. You can create copies of all communications generated for the primary ID or select specific communications to copy. To create the copy letter, you must set up a template with the related ID's name and address. When the letter generation data extract process encounters a letter code that is set to include a copy to the individual's related ID, it extracts the related person's address data from the Relationship Address page.

Note. For confidentiality purposes, the communication recipients that you set here will not receive copies of communications set to allow joint communications for a relationship, even when you select *All Communications.* This preserves information communicated to Mr. and Mrs. Smith, for example.

All Communications	Select to indicate that the system should generate a copy of all communications to the primary individual for this related individual.
Letter Code	Enter the letter code, from the Standard Letter Codes page, for the communication to copy.

Warning! When an individual has multiple relationships set up with communication recipients, the process extracts data for all the related IDs. When merging the data into the template, the process lists a maximum of five recipients as receiving a copy. You can create and send copies to more than five recipients, but the letter can only list five, as shown in the following sample letter.

PeopleSoft8

July 25, 2001

Ralph E Crowe
506 Harbour Place
Sydney
Australia

This communication has been sent to John Roberts. You are receiving a copy because you either requested to receive a copy or the school has designated you to receive a copy of this type of letter.

Dear John Roberts:

Thanks for your interest in PeopleSoft University! Before we can review your application, we need to receive the following items from you as soon as possible.

If you have any questions about the above items, please feel free to contact the Admissions Office at 888-555-1212. We look forward to reading your completed application!

Sincerely,

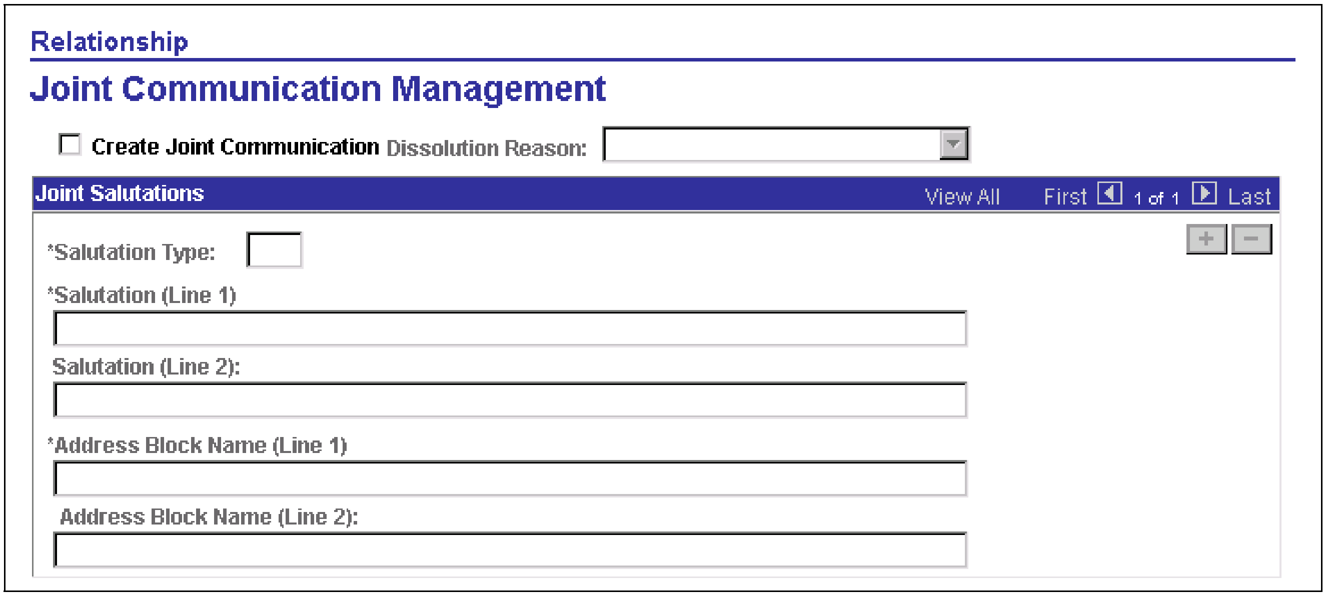
Barbara Smith
Admissions Office

cc Joanne Beatrice Allen
cc Julianne Binoche
cc Ralph E Crowe
cc Ted Han

Example of a CCLTRREC.doc letter for recipients set on the Communication Recipient page

Creating the Joint Communications Relationship

Access the Joint Communication Management page.



Joint Communication Management page

Create Joint Communication

Select to indicate that joint communications should be addressed to both the primary and related individuals, using the salutation information specified on this page.

Dissolution Reason

When you clear the Create Joint Communication option, or when you inactivate the relationship to stop joint communications for these two individuals, the Dissolution Reason field becomes available. You can enter the reason (for example, *Deceased Partner, Divorce,* or *Per Request*) for dissolving the joint communications.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Salutation Type

Select the type of salutation, from the Joint Salutation Type Table page, that the system should use for joint communications to these IDs.

When you select a salutation type, the system displays the individuals' names in the Salutation and Address Block Name fields, based on the default formats associated with that salutation type. The default formats are designed to reduce data entry; however always validate that the information is correct.

Note. When you select the Create Joint Communication check box, the system displays the default salutation type from the Installation Default – CC page. You can add salutation types, but do not delete the default value. Use the default value as the lowest level joint usage on the Name Usage page so that when you run the letter generation process, it does not fail due to a lack of salutation type.

Salutation (Line 1), Salutation (Line 2)

The system displays the names of the two individuals as they will appear in the greeting of the letter according to the default salutation format for the salutation type defined on the Joint Salutation Type Table page.

For example:

Mr. and Mrs. Smith

or, using two lines:

John Smith

Mary Fletcher

Address Block Name (Line 1) Address Block Name (Line 2)

The system displays the names of the two individuals as they will appear in the address of the letter (and envelope or label if applicable) according to the default address block format for the salutation type defined on the Joint Salutation Type Table page.

For example:

Mr. and Mrs. Smith

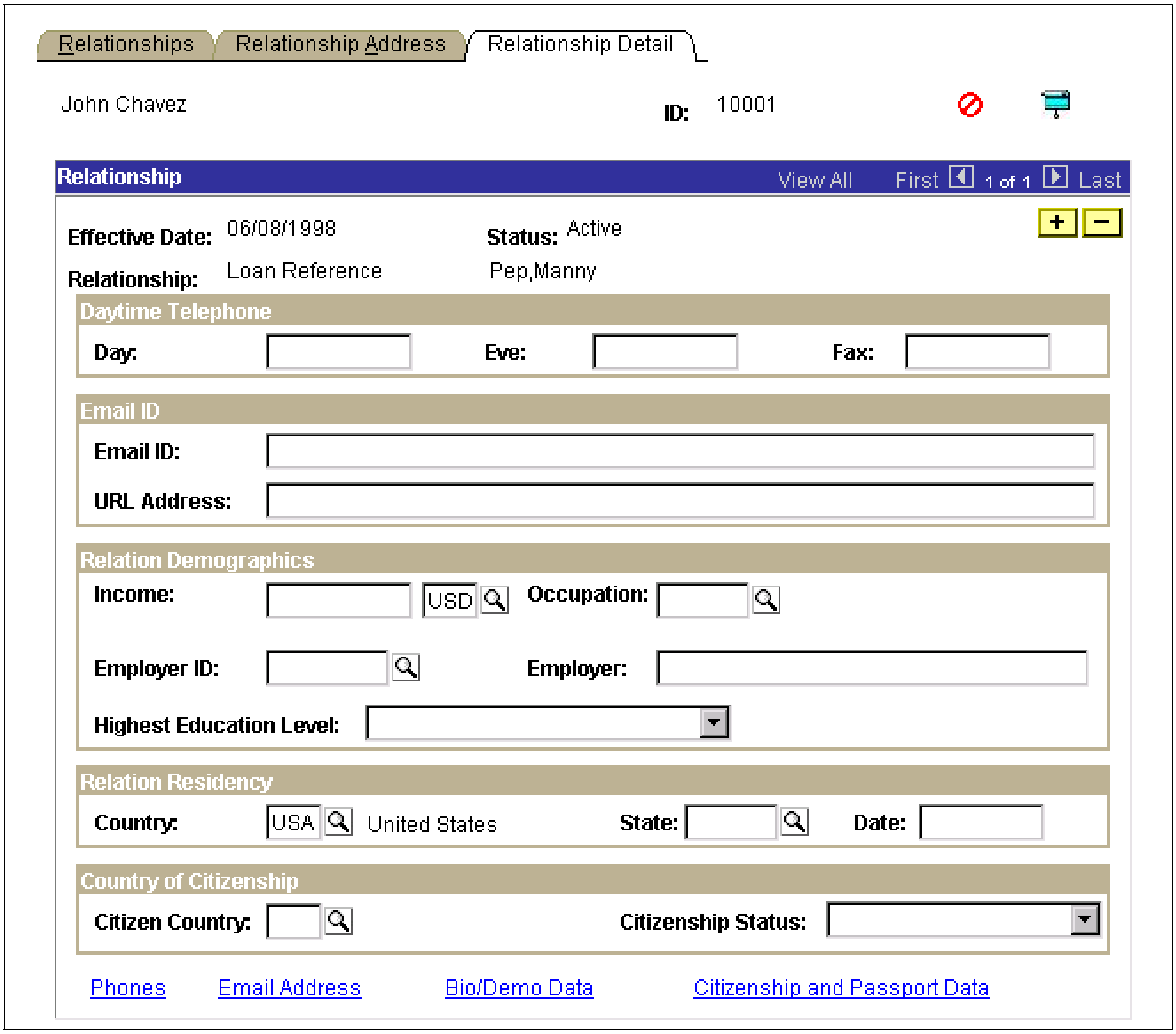
or, using two lines:

John Smith

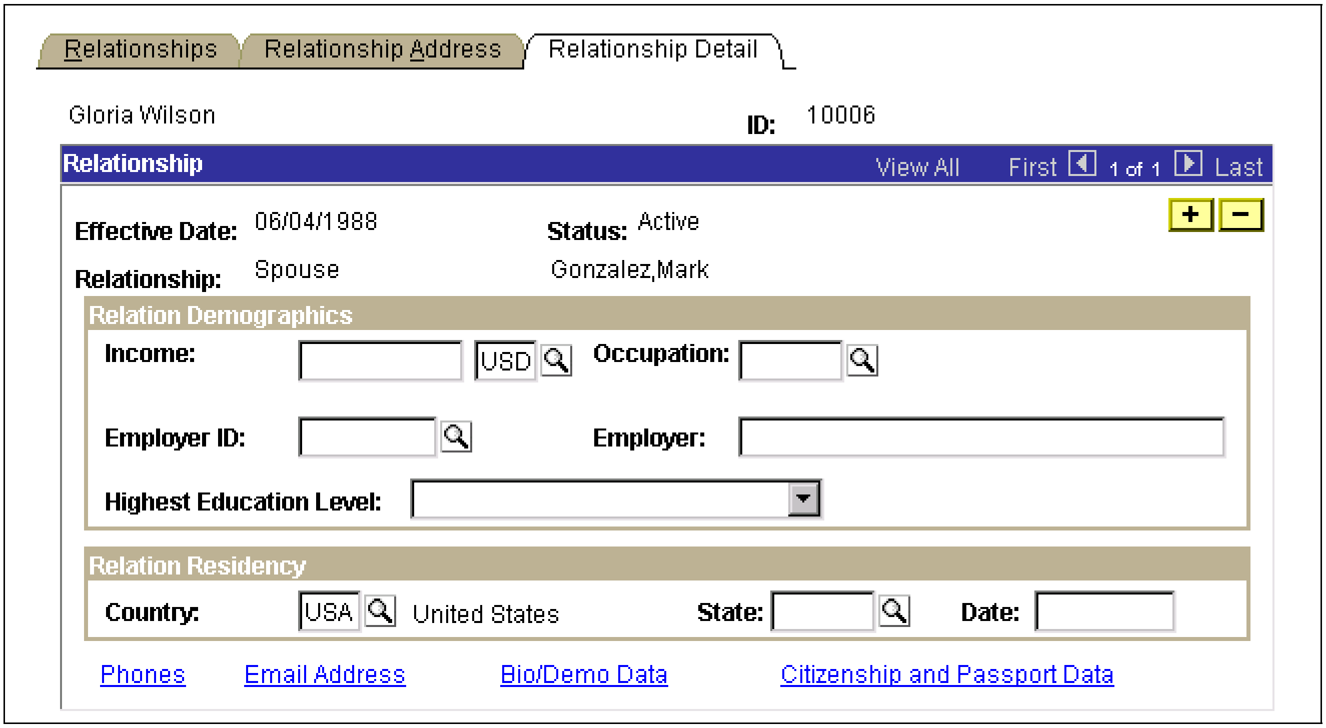
Mary Fletcher

Entering Relationship Detail Data

Access the Relationship Detail page.



Relationship Detail page (related individual with no ID in your database)



Relationship Detail page (related individual with an ID in your database)

Daytime Telephone

For a related individual with no ID in your database, manually enter the individual's phone data here. For a related individual with an ID in your database, click the Phones link.

Phones	Click to access the Phone Numbers page, where you can review or change telephone numbers for this individual.

Email ID

For a related individual with no ID in your database, manually enter the individual's email data here. For a related individual with an ID in your database, click the Email Address link.

Email Address	Click to access the Electronic Addresses page, where you can review or change email and URL addresses for this individual.

Relation Demographics

For related individuals with or without an ID in your database, manually enter data in the fields listed. For a related individual with an ID in your database, click the Bio/Demo Data link to review additional information.

Income	Enter the amount of the related individual's income and the currency in which it is expressed. The amount is usually annually, but it can be hourly, monthly, or annually.
Occupation	Select the related individual's occupation, from the Standard Occupation Classification Code page.

Employer ID If the related person is employed by an organization that is in your database, identify that organization here.

Employer The system automatically displays the name of the related person's employer if you selected an employer ID. If the employer does not have an organization ID in your database, you can manually enter the employer's name here.

Highest Education Level Specify the highest level of education that the related person has achieved.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Bio/Demo Data Click to access the Bio/Demo Data page, where you can review or change additional demographic data for the related individual.

Relation Residency

For related individuals with or without an ID in your database, you must manually enter the related individual's Country, State, and Date of residency.

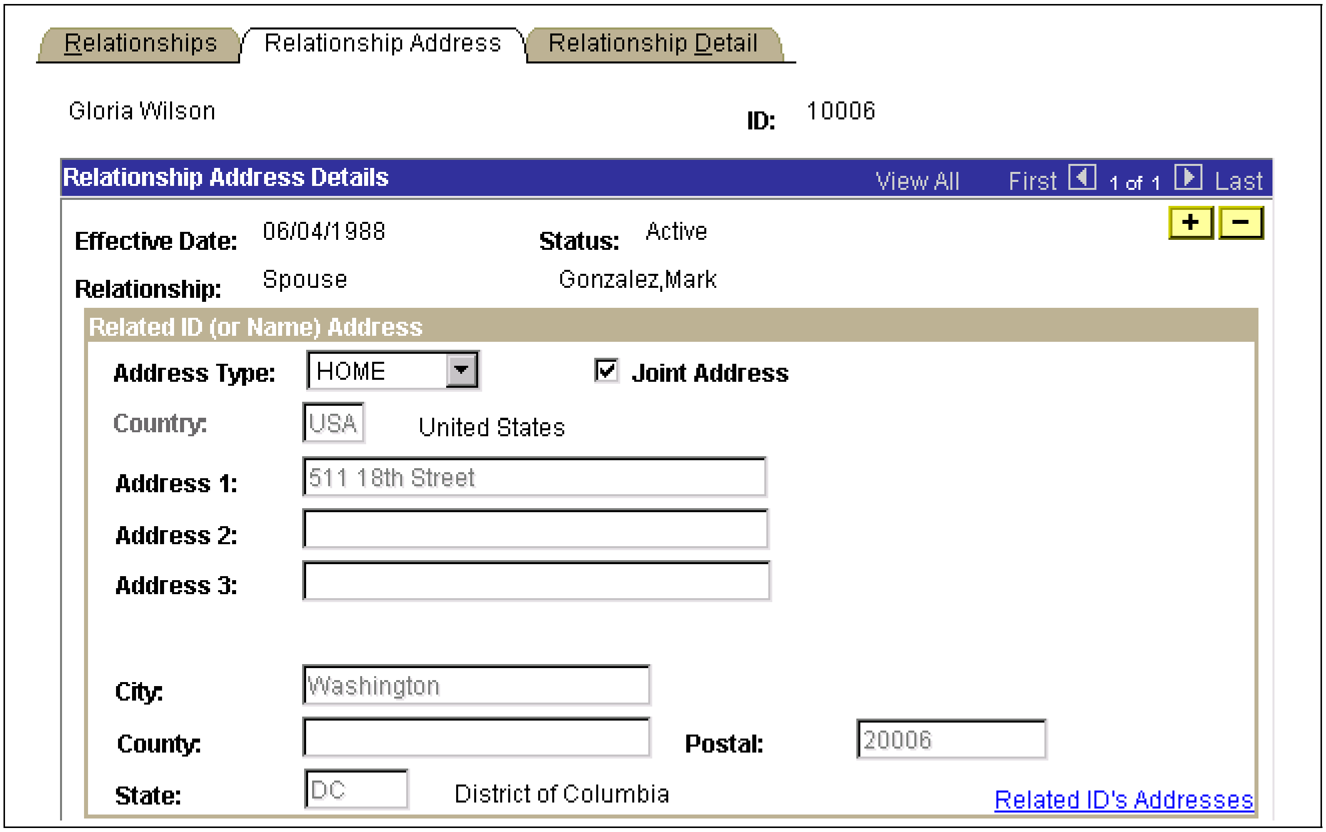
Country of Citizenship

For related individuals with or without an ID in your database, you must manually enter the related individual's Citizen Country and Citizenship Status. For a related individual with an ID in your database, click the Citizenship and Passport Data link to review additional data.

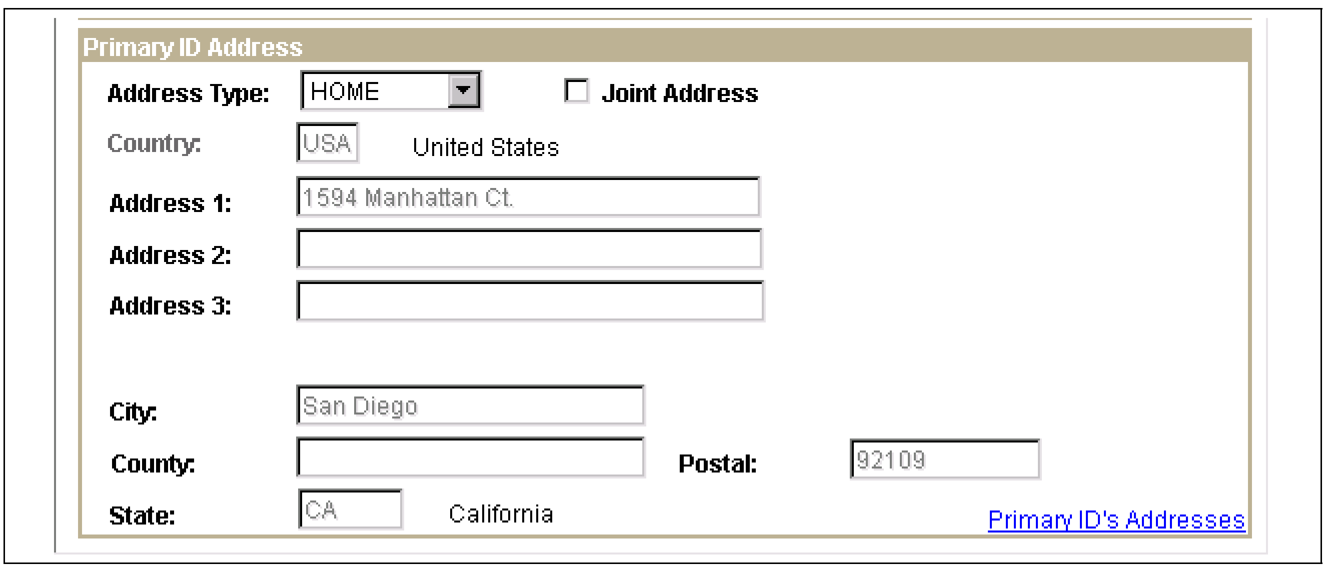
Citizenship and Passport Date Click to access the Citizenship/Passport page, where you can review or change additional citizenship and passport data.

Entering Relationship Addresses

Access the Relationship Address page.



Relationship Address page (1 of 2)



Relationship Address page (2 of 2)

Related ID (or Name) Address

Address Type Select the related individual's address type to associate with this relationship.

If the related person does not have an ID in your database, the address fields become available for you to manually enter the related person's address data.

When the individual has an ID your database, the system automatically displays the address data for the address type you select. Only those address types that contain data are available.

Joint Address

Indicates that this is the address to which joint communications for these two individuals should be sent.

If you are creating joint communications for this relationship, you can select either the related individual's address or the primary individual's address as the joint address, but you *must* select one of them—you cannot select both.

Related ID's Addresses

If the related person has an ID in your database, you can click this link to access the Addresses page, where you can edit or update the related person's address data.

Primary ID Address

Address Type

Select the primary individual's address type to associate with this relationship.

Because the primary individual has an ID your database, the system automatically displays the address data for the address type that you select. Only those address types that contain data are available.

Joint Address

Select to indicate that this is the address to which joint communications for these two individuals should be sent.

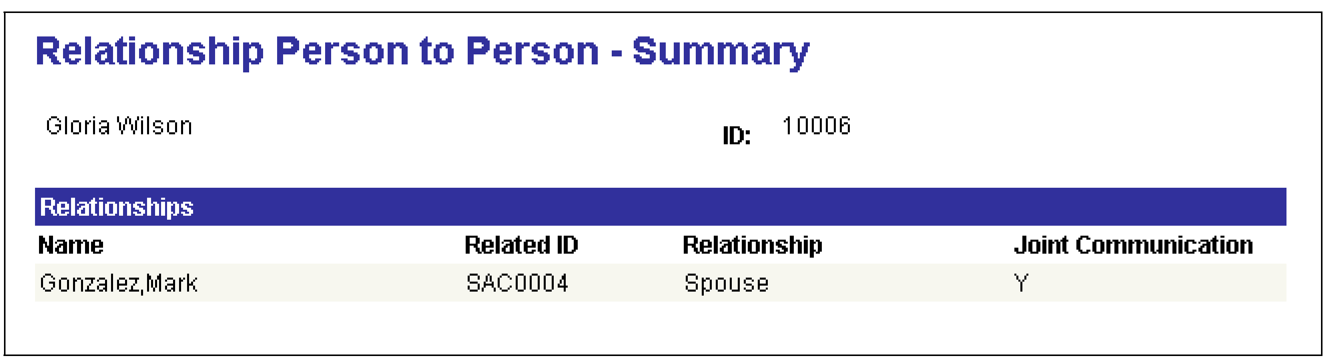
If you are creating joint communications for this relationship, you can select either the related individual's address or the primary individual's address as the joint address, but you *must* select one of them—you cannot select both.

Primary ID's Addresses

Click to access the Addresses page where you can edit or update the primary person's address data.

Viewing a List of Relationships

Access the Relationship Person to Person − Summary page to view a list of an individual's relationships.



Relationship Person to Person − Summary page

The Relationship Person to Person − Summary page is for viewing only. You cannot enter or edit data here. Data that appears here is entered on the Relationships page.

Entering Religious Preferences Data

This section provides an overview of entering religious preferences data.

Prerequisites

Before you can enter religious preferences data, you must define religious preference codes.

See Also

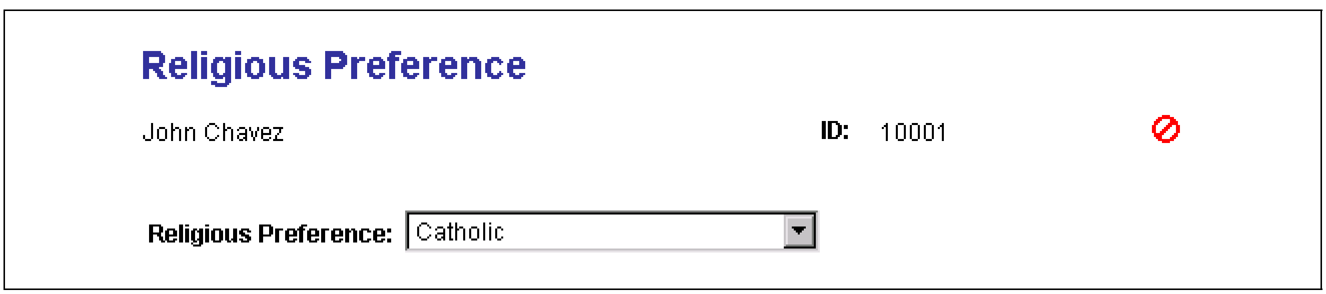
Chapter 5, "Setting Up Bio/Demographic Data," Setting Up Religious Preferences, page 52

Page Used to Enter Religious Preferences Data

Page Name	Object Name	Navigation	Usage
Religious Preferences	RELIGIOUS_PREF	• Build Community, Bio/Demographic Data, Use, Religious Preference, Religious Preference • Manage Contributor Relations, Manage People, Use, Religious Preference, Religious Preference	Enter data to identify an individual's religious preference.

Entering Religious Preferences

Access the Religious Preferences page.



Religious Preference page

Religious Preference Enter the religion that the individual reports to be his or her preference.

Entering Emergency Contact Data

This describes how to

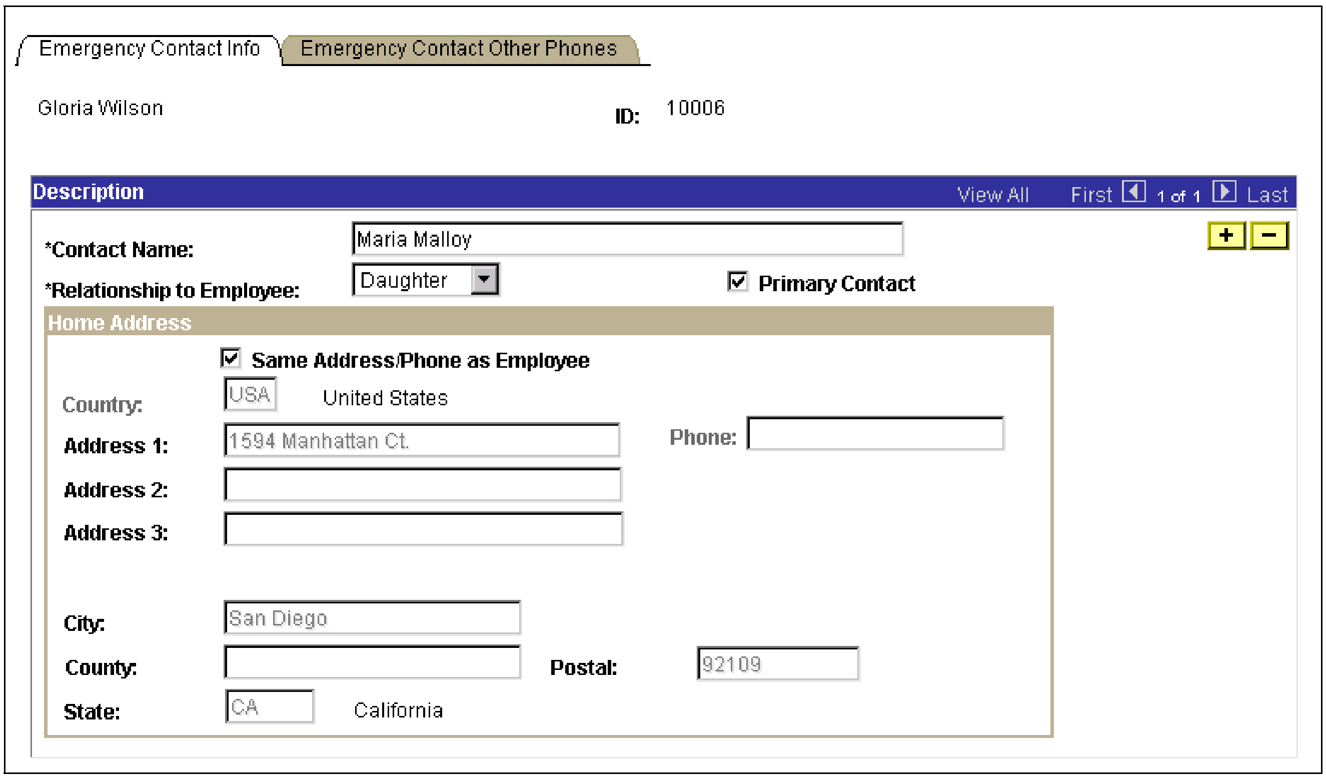
- Enter emergency contact data.
- Enter additional phone numbers for the emergency contact.

Pages Used to Enter Emergency Contact Data

Page Name	Object Name	Navigation	Usage
Emergency Contact Information	EMERG_CNTCT_PERS1	Build Community, Bio/Demographic Data, Use, Emergency Contacts, Emergency Contact Information	Enter an individual's emergency contact data, including the contact's name, addresses, and primary phone number.
Emergency Contact Other Phones	EMERG_CNTCT_PERS2	Build Community, Bio/Demographic Data, Use, Emergency Contacts, Emergency Contact Other Phones	Enter additional telephone numbers for an emergency contact.

Entering Emergency Contact Data

Access the Emergency Contact Information page.



Emergency Contact Information page

Contact Name Enter the name of the emergency contact for this individual.

Relationship to Employee Select the relationship of the emergency contact to the individual at your institution.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

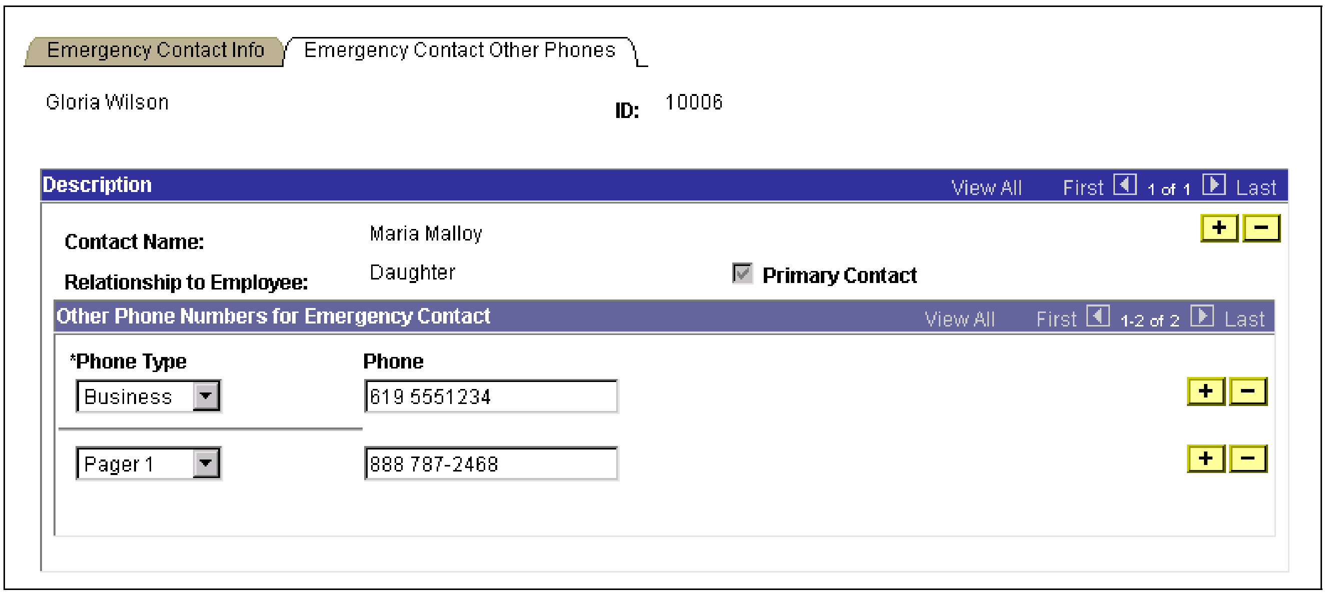
Primary Contact Select to indicate that this is the first person you should contact in an emergency. An individual can have only one primary contact.

Same Address/Phone as Employee Select to indicate that the address and phone number are the same for the primary individual and this emergency contact. The system automatically displays data for the primary address identified on the installation page, and phone data for the preferred phone type identified on the Phone Numbers page.

If the emergency contact's and the primary individual's address and phone are not the same, enter the contact's address and phone data.

Entering Additional Phone Numbers for the Emergency Contact

Access the Emergency Contact Other Phones page.



Emergency Contact Other Phones page

Phone Type Select the phone type that describes the additional phone number for this emergency contact.

Phone Enter the additional phone number for this emergency contact.

Tracking Work Experience

This section discusses how to:

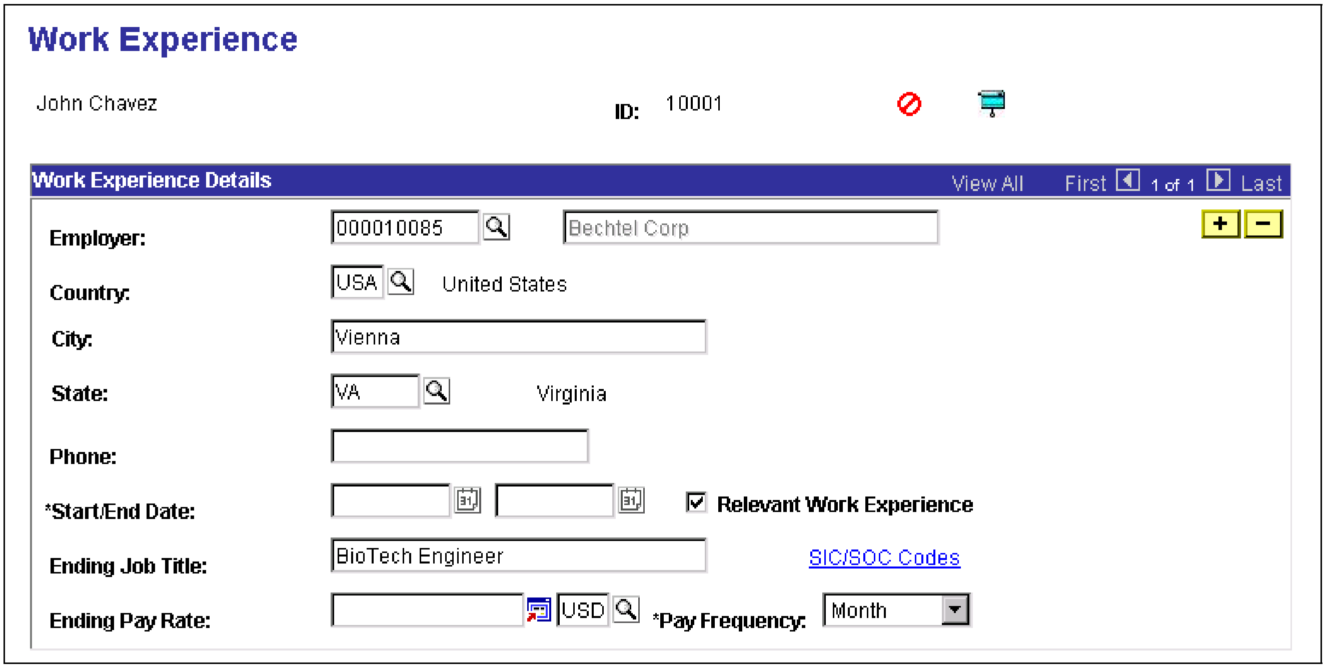
- Enter work experience data.
- Enter the standard industry or occupation classification code.

Pages Used to Track Work Experience

Page Name	Object Name	Navigation	Usage
Work Experience	PRIOR_WORK_EXP_SA	• Build Community, Bio/Demographic Data, Use, Work Experience, Work Experience • Manage Contributor Relations, Manage People, Use, Work Experience, Work Experience • Develop Enrollment, Manage Recruiters, Use, Work Experience, Work Experience • Develop Enrollment, Process Applications, Use, Work Experience, Work Experience • Develop Enrollment, Recruit Prospective Students, Use, Work Experience, Work Experience	Enter data to track an individual's work experience
Industry/Occupation	PRIOR_WORK_EXP_SEC	Click the SIC/SOC Codes button on the Work Experience page.	Enter the SIC and SOC codes to identify the position.

Entering Work Experience Data

Access the Work Experience page.



Work Experience Page

Employer

If the employer is an organization in your database, select the organization's ID. The system displays the organization name and address.

If the employer is not an organization in your database, enter the employer's name and address.

Start/End Date

Enter the dates when the individual began and ended employment with this employer.

Relevant Work Experience

Select to indicate that the former position is relevant to a current position within your institution or to the career that the individual is seeking.

Ending Job Title

Enter the title of the last position that the individual held with this employer.

SIC/SOC Codes

Click this link to access the Industry/Occupation Codes page, where you can view or select the SIC and SOC codes for this position.

Ending Pay Rate

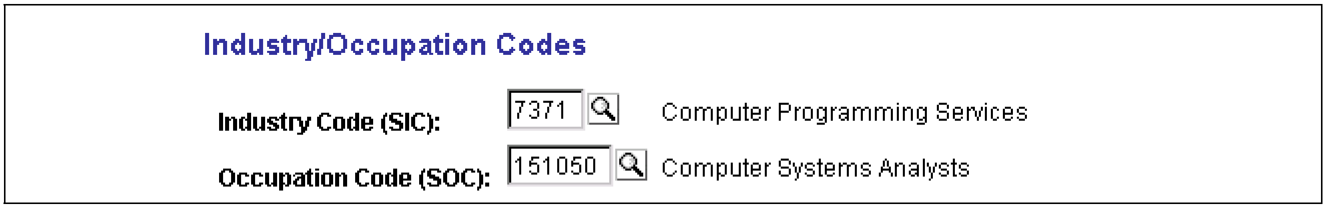
Enter the last rate of pay that the individual received from this employer.

Pay Frequency

Select the frequency that describes the ending pay rate.

Entering the Standard Industry or Occupation Classification Code

Access the Industry/Occupation Codes page.



Industry/Occupation Codes page

Industry Code (SIC) Select the code, from the Standard Industry Table page, that best describes the job or position. When you select the code, the system displays the description.

Occupation Code (SOC) Select the code, from the Standard Occupation Classification Table page, that best describes the job or position. When you select the code, the system displays the description.

CHAPTER 21

Managing FERPA

This chapter provides an overview managing data to comply with the U.S. Family Educational Rights and Privacy Act (FERPA) requirements or other privacy requirements that your institution might have. It discusses how to:

- Apply or release FERPA restrictions.
- Determine releasable information.

Understanding FERPA

Under FERPA, regulations, institutions can release directory information about a student, provided that the student has reasonable opportunity to prohibit, in writing, the disclosure of such information.

FERPA regulations define which items qualify as directory information, however each institution must identify and make known which of those items it plans to publish or share as directory information. PeopleSoft delivers examples of typical directory information in the FERPA_VW control tables. You must configure these examples to reflect your institution's directory information.

Note. Not all information defined as potential FERPA directory information is controlled by the delivered FERPA functionality. You may need to expand or modify the delivered records and views if other information about students is subject to FERPA regulations or should be treated as confidential according to your institution's policy. For more information about your institution's or FERPA's definition of directory information, contact your institution's registrar's office. Other resources on FERPA directory information and other regulations include: The Family Policy Compliance Office, U.S. Department of Education, and the American Association of Collegiate Registrars and Admissions Officers (AACRAO).

Under FERPA, students can prohibit the release of directory data about themselves. With PeopleSoft FERPA, students can restrict data, but they can also give you permission to release some or all of that restricted data for inclusion in specific internal publications.

 (FERPA privacy shade)	When you apply FERPA control to restrict data for a student, the system attaches a FERPA window shade privacy button to that individual's records in your database.

Click the FERPA privacy button on a page about that individual to quickly determine the information that is legally releasable to others at your institution or to third-party vendors about that individual. You can also navigate directly to the FERPA Display inquiry pages for each type of information (bio/demo data, addresses, activities, and so on) to determine the same information.

Prerequisites

Before you can apply and manage FERPA control, you must establish FERPA control fields. Before you can allow students to identify publications for which they release FERPA restrictions, you must set up your institution's publications.

See Also

Chapter 7, "Setting Up FERPA Control," page 65

Applying FERPA Control

When students exercise rights under FERPA, they identify information that they do not want your institution to release about themselves. You must apply FERPA control to identify this information and prohibit the release of restricted information across your institution. Students have the option of permitting your institution to release any of the restricted information to specific internal publications.

You can use the FERPA page or the FERPA Quick Entry page to apply FERPA control from the administrative side, or if your institution has purchased PeopleSoft Personal Portfolio Collaborative Application, you can make students responsible for applying their own FERPA control over the internet from the FERPA self-service page.

This section discusses how to:

- Apply or release FERPA restrictions.
- Using the FERPA Quick Entry page.
- Specify or review publications to which restricted data may be released.

Note. If your institution has licensed and implemented PeopleSoft Personal Portfolio Collaborative Application, students can use the FERPA self-service page to apply their own FERPA restrictions and to identify which restricted information your institution can include in specific internal publications.

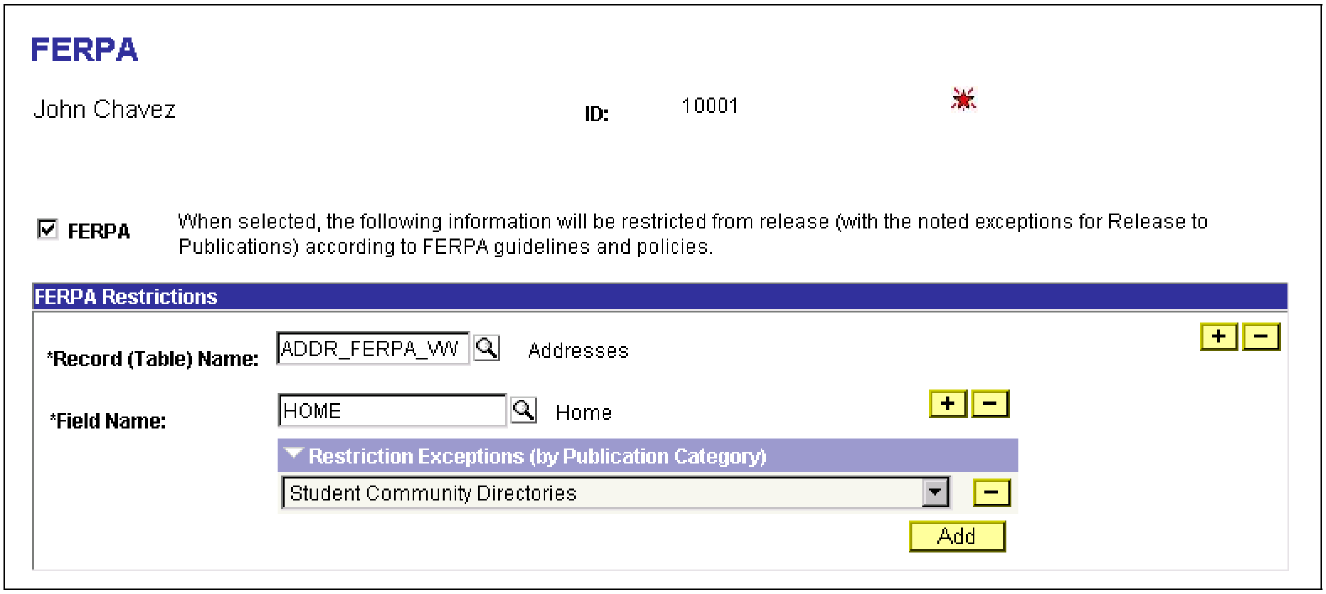
See Chapter 40, "Using PeopleSoft Personal Portfolio Collaborative Application," page 509.

Pages Used to Apply FERPA Control

Page Name	Object Name	Navigation	Usage
FERPA	FERPA	Build Community, Services Data, Use, FERPA, FERPA	Apply or release FERPA restrictions to selected data for an individual.
FERPA Quick Entry	FERPA_ADMIN_QENTRY	Build Community, Services Data, Use, FERPA Quick Entry, FERPA Admin Qentry	Apply or release FERPA restrictions to selected data for an individual.
Release to Publication	INST_PUB_CATG_SEC	Click the Release To Publication link on the FERPA Quick Entry page.	Specify or review publications to which restricted data may be released.

Applying or Releasing FERPA Restrictions

Access the FERPA page (or the FERPA Quick Entry) page.



FERPA page

FERPA
Select to indicate that the student has, in accordance with FERPA, instructed your institution not to release the information about them, and to display the FERPA Restrictions area at the bottom of the page where you can select the record and field to restrict.

FERPA Restrictions

Record (Table) Name
Select the name of the FERPA_VW record, from the FERPA Control Page, that contains the type of information the student is restricting.

Field Name
Select the name of the controlled field on the FERPA_VW record that contains the specific information the student is restricting.

Restriction Exceptions (by Publication Category)
Select each of the publications, from the Publications Categories page, to which the student gives you permission to release the otherwise restricted information.

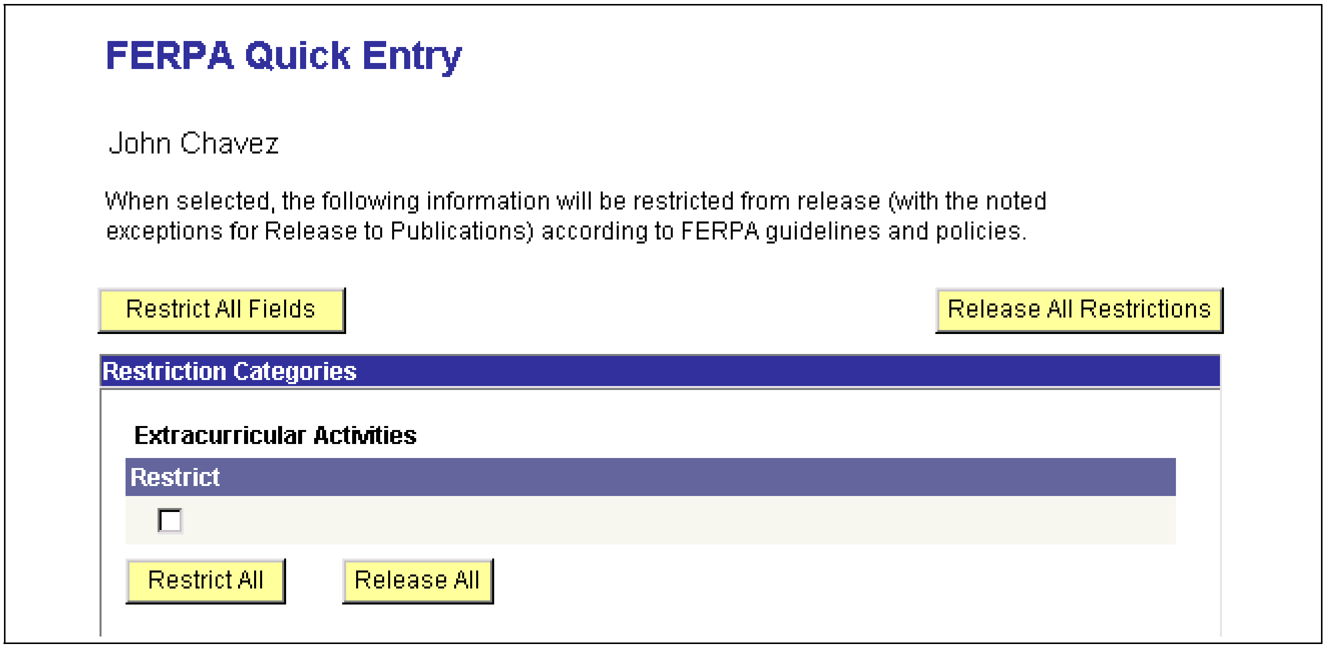
All Community Directories: Indicates that the student gives permission to release the otherwise restricted information for inclusion in all of your institution's internal community directories.

Student Community Directory: Indicates that the student gives permission to release the otherwise restricted information for inclusion in your institution's internal student directory only.

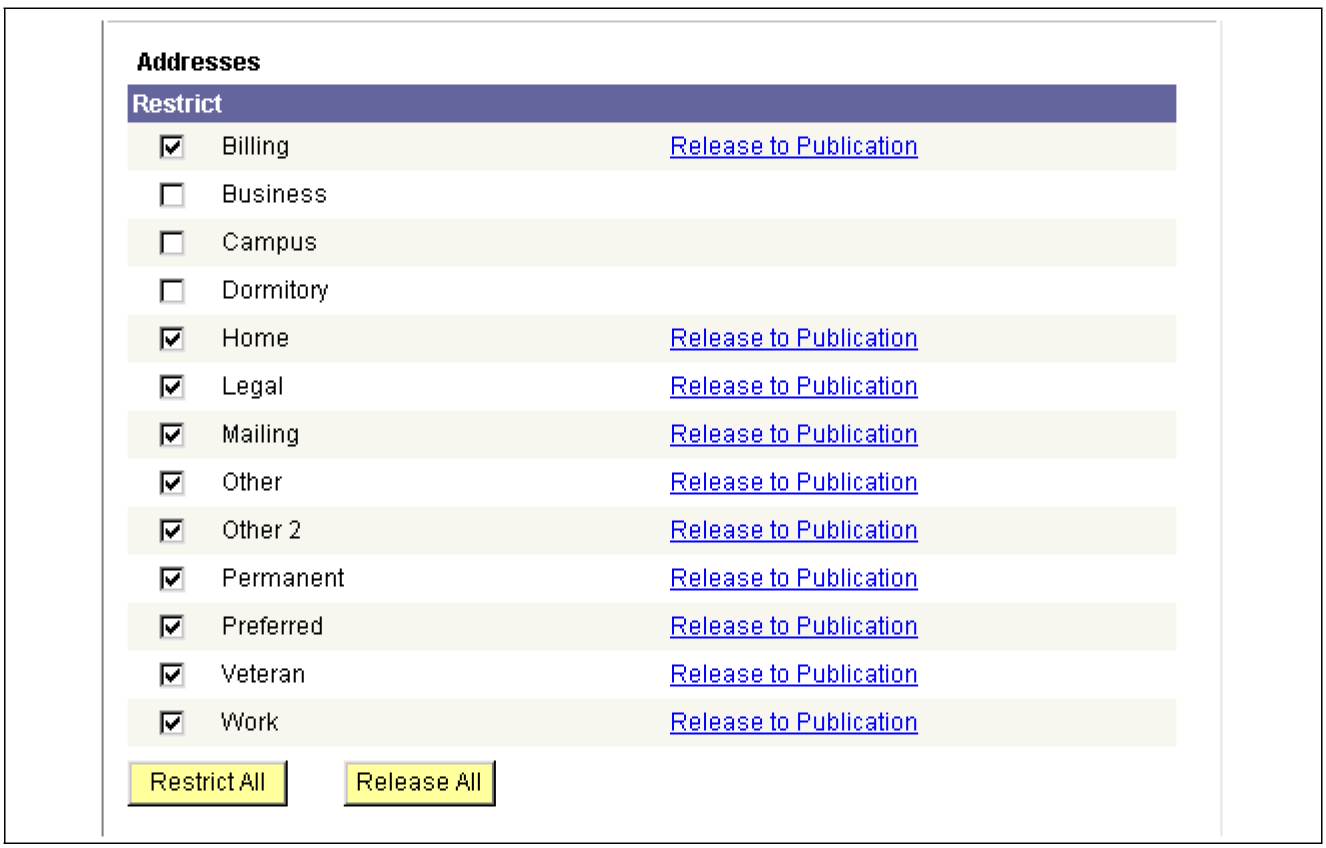
Note. Publication categories are used in PeopleSoft Community Directory Collaborative Application. You can add new categories and add publications to the delivered categories, but do *NOT* delete the delivered categories.

Using the FERPA Quick Entry

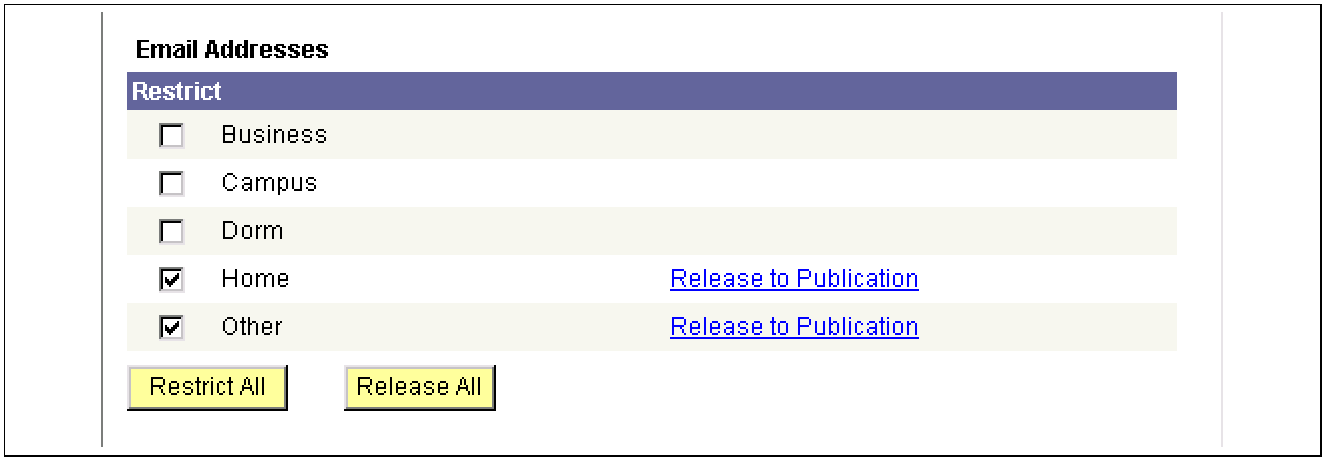
Access the FERPA Quick Entry page.



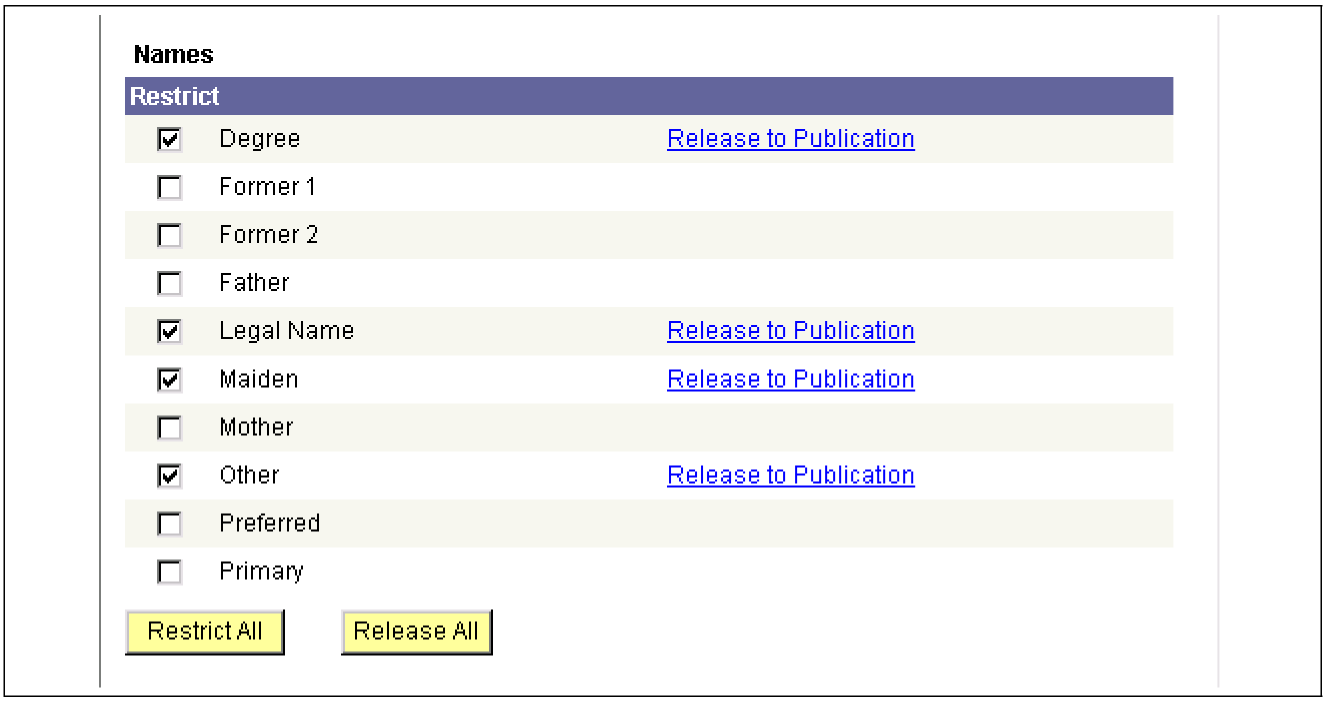
FERPA Quick Entry page (1 of 7) – Extracurricular Activities



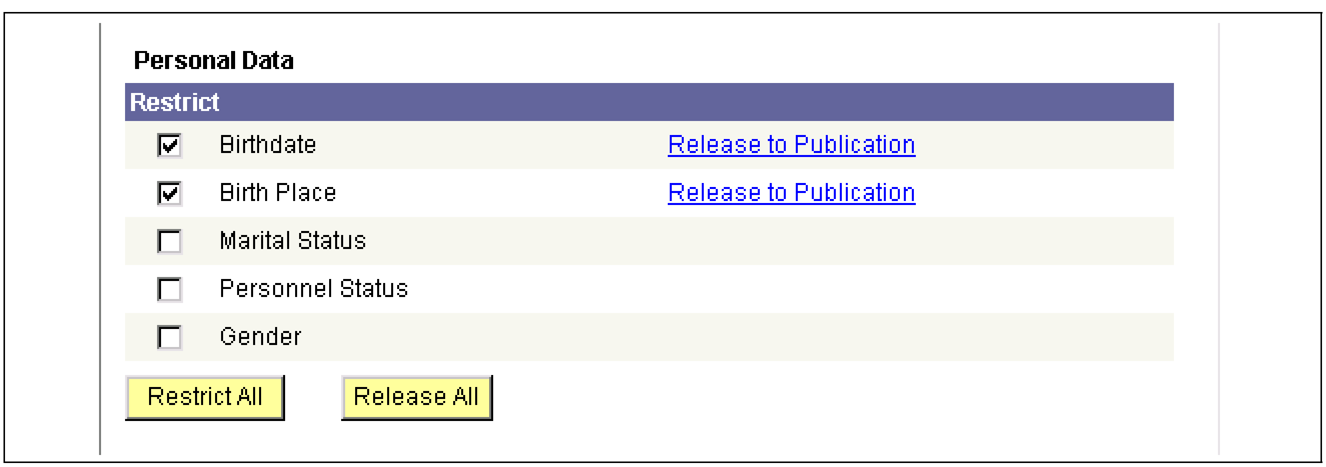
FERPA Quick Entry page (2 of 7) – Addresses



FERPA Quick Entry page (3 of 7) − Email Addresses

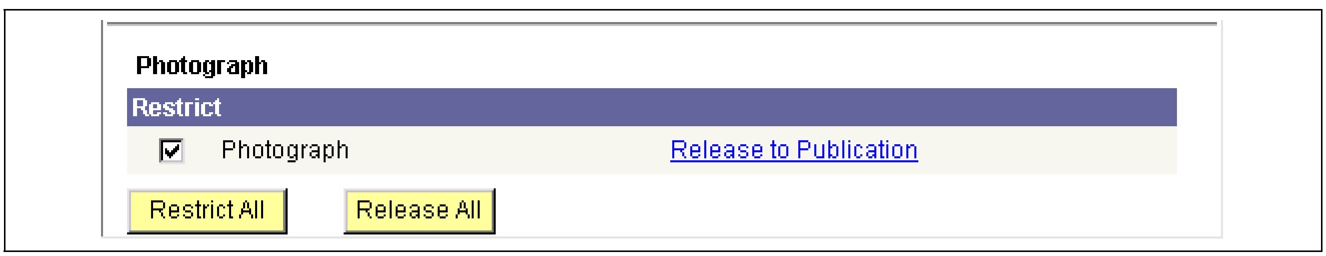


FERPA Quick Entry page (4 of 7) − Names



FERPA Quick Entry page (5 of 7) − Personal Data

FERPA Quick Entry page (6 of 7) − Phones



FERPA Quick Entry page (7 of 7) − Photograph

Restrict All Fields Click to select the Restrict option for all fields in all categories on the entire page.

Release All Restrictions Click to clear the Restrict option for all fields in all categories on the entire page.

Restriction Categories

The fields that display for each category are based on the controlled fields identified for each FERPA_VW record on the FERPA Control page.

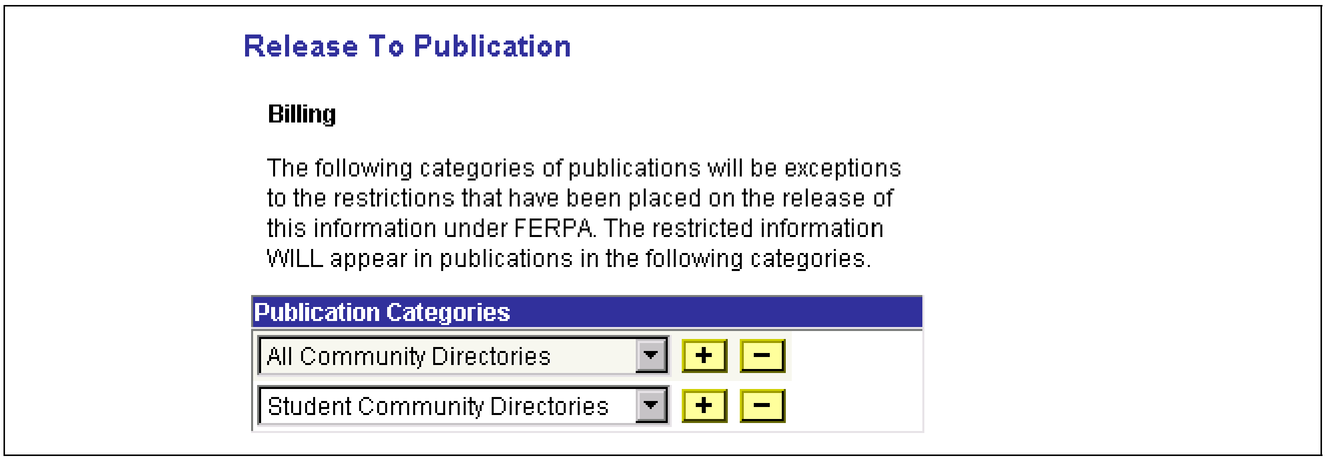
Note. Extracurricular Activities field names do not appear because PeopleSoft does not deliver sample control fields on the ACTVTS_FERPA_VW record. To set control fields for activities, use the FERPA Control page.

See Chapter 7, “Setting Up FERPA Control,” page 65.

Restrict	Select to indicate that the student prohibits your institution from releasing this information.
Release to Publication	Select to access the Release to Publication page where you can enter or review publications to which the restricted data may be released.
Restrict All	Click to select the Restrict option for all fields in the category.
Release All	Click to clear the Restrict option for all fields in this category.

Releasing FERPA Data to Publications

Access the Release to Publication page.



Release to Publication page

Publication Categories Select the publication, from the Publication Categories page, to which the student gives you permission to release this specific, otherwise restricted information.

All Community Directories: Indicates that the student gives permission to release the otherwise restricted information for inclusion in all of your institution’s internal community directories.

Student Community Directory: Indicates that the student gives permission to release the otherwise restricted information for inclusion your institution’s internal student directory only.

Note. Publication categories are used in PeopleSoft Community Directory Collaborative Application. You can add categories, and add publications to the delivered categories, but you should *NOT* delete the delivered categories.

Determining Releasable Information

This section discusses how to:

• Determine releasable bio/demo data.

- Determine releasable names data.
- Determine releasable addresses data.
- Determine releasable phone numbers data.
- Determine releasable email addresses data.
- Determine releasable activities data.

Understanding the Determination of Releasable Information

You can determine releasable information about an individual two ways:

- You can click the FERPA (privacy shade) button on a page about an individual to display the Releasable FERPA Directory Information page.
- You can navigate directly to the FERPA Display pages from the Inquiry menu to review all releasable information about an individual.

Note. Field names appear on the Releasable FERPA Directory Information page and the FERPA Bio Demo display page only if that type of data is releasable. If a field is releasable but no data exists for it, the field name appears but with no field value. For example, if the individual's birth location is releasable but data for it is not in the system, the field name Birth Location appears on the page, but the field value box beside it is empty.

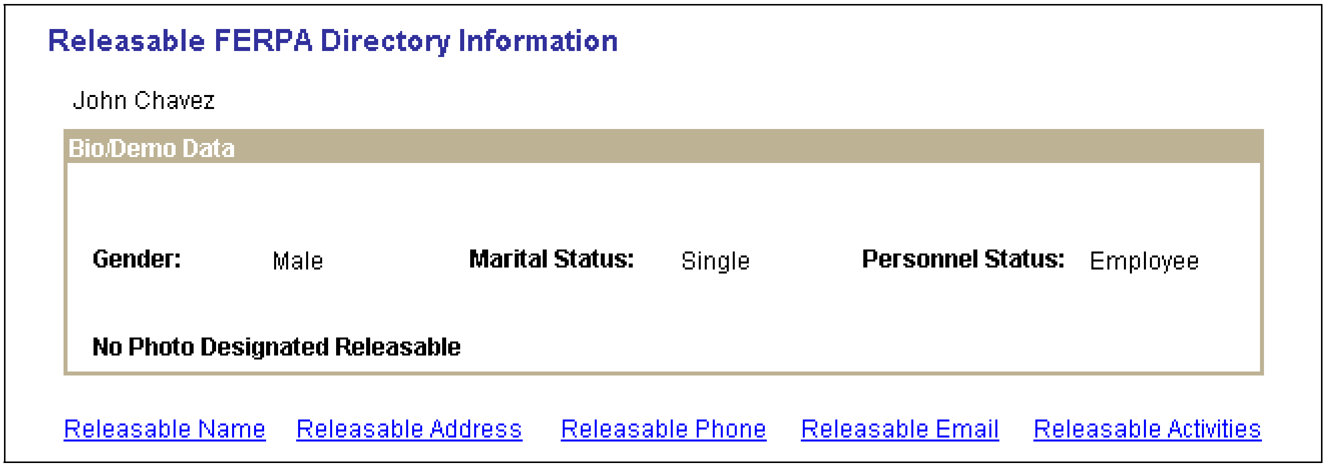
Pages Used to Determine Releasable Information

Page Name	Object Name	Navigation	Usage
Releasable FERPA Directory Information	FERPA_DISPLAY1_SP	Click the FERPA (privacy shade) button from most pages for the individual.	Determine releasable data for an individual, including gender, marital status, and photo.
Releasable Names	FERPA_DSP_NAME_SEC	Click the Releasable Name link on the Releasable FERPA Directory Information page.	Determine the releasable names for an individual.
Releasable Addresses	FERPA_DSP_ADDR_SEC	Click the Releasable Address link on the Releasable FERPA Directory Information page.	Determine the releasable names for an individual.
Releasable Phone Numbers	FERPA_DSP_PHON_SEC	Click the Releasable Phone link on the Releasable FERPA Directory page.	Determine the releasable phone numbers for an individual.
Releasable Email Addresses	FERPA_DSP_EMAIL_SP	Click the Releasable Email link on the Releasable FERPA Directory Information page.	Determine the releasable phone numbers for an individual.
Releasable Activity Information	FERPA_DSP_ACT_SEC	Click the Releasable Activities link on the Releasable FERPA Directory Information page.	Determine the releasable extracurricular activity information for an individual.

Page Name	Object Name	Navigation	Usage
FERPA Bio Demo	FERPA_DISPLAY1	• Build Community, Services Data, Inquire, FERPA Display, FERPA Bio Demo • Manage Contributor Relations, Manage Prospects, Inquire, FERPA Display, FERPA Bio Demo	Determine releasable bio/demo data about an individual, including gender, marital status, and names.
FERPA Addresses	FERPA_DISPLAY2	• Build Community, Services Data, Inquire, FERPA Display, FERPA Addresses • Manage Contributor Relations, Manage Prospects, Inquire, FERPA Display, FERPA Addresses	Determine releasable address data for an individual.
FERPA Phones	FERPA_DISP_PHONES	• Build Community, Services Data, Inquire, FERPA Display, FERPA Phones • Manage Contributor Relations, Manage Prospects, Inquire, FERPA Display, FERPA Phones	Determine releasable phone data for an individual.
FERPA Email Address	FERPA_DISP_EMAIL	• Build Community, Services Data, Inquire, FERPA Display, FERPA Email Addrs • Manage Contributor Relations, Manage Prospects, Inquire, FERPA Display, FERPA Email Addrs	Determine releasable email data for an individual.
FERPA Activities	FERPA_DISP_ACTVTS	• Build Community, Services Data, Inquire, FERPA Display, FERPA Activities • Manage Contributor Relations, Manage Prospects, Inquire, FERPA Display, FERPA Activities	Determine releasable extracurricular activity data for an individual.
FERPA Photo	FERPA_DISP_PHOTO	• Build Community, Services Data, Inquire, FERPA Display, FERPA Photo • Manage Contributor Relations, Manage Prospects, Inquire, FERPA Display, FERPA Photo	Determine if a photo of the individual is releasable.

Determining Releasable Bio/Demo Data

Access the Releasable FERPA Directory Information page.



Releasable FERPA Directory Information page

When releasable data for the individual exists, the appropriate links are available. Information on this page is entered on the FERPA page or FERPA Quick Entry page.

Releasable Name	Click to access the Releasable Name page, where you can view releasable names for this individual.
Releasable Address	Click to access the Releasable Addresses page, where you can view releasable addresses for this individual.
Releasable Phone	Click to access the Releasable Phone Numbers page, where you can view releasable phone numbers for this individual.
Releasable Email	Click to access the Releasable Email Addresses page, where you can view releasable email addresses for this individual.
Releasable Activities	Click to access the Releasable Activity Information page, where you can view releasable extracurricular activity information for this individual.

CHAPTER 22

Managing Service Indicators

This chapter provides an overview of service indicators and discusses how to:

- Assign or remove service indicators.
- Review active service indicators.
- Audit service indicator history.

See Also

Chapter 6, “Setting Up Service Indicators,” page 57

Understanding Service Indicators

Use service indicators to provide or limit access to services at your institution for an individual. Service indicators can be holds to prevent an individual from receiving certain services or positive indicators to designate special services to be provided. Service indicators consist of one or more impact values identifying the types of specific services that are restricted or provided.

Examples of negative service indicators include no check cashing privileges, enrollment verification or transcript holds, and denied registration for classes. Positive service indicators might include check-cashing privileges, front-of-line service, use of the gym, and special services for disabled students.

For example, you might define a positive service impact to permit some students to receive their student identification cards a few days earlier than the rest of the student body. And you could define yet another service impact that is negative, that prevents certain students from receiving their student identification cards at all (perhaps until the student submits a past due enrollment deposit).

The first impact, permitting students to receive their ID cards early, is positive. The other impact, restricting ID cards from being awarded until the enrollment deposit is made, is negative.

After you define service impacts, you can group them to define service indicators and create service indicator codes. Next, you identify reasons for applying service indicators and create codes for those reasons. When you create service indicators and reason codes, administrative users with the appropriate security can assign service indicators to individuals. They can also remove an active service indicator from an individual’s record when that service or restriction no longer applies. Automated processes can also be used to assign or remove negative service indicators.

When a service indicator is assigned to an individual, the corresponding negative or positive service indicator button appears on most pages about that individual. One button can represent one or several service indicators. Click the buttons on any of those pages to transfer to the appropriate details page where you can determine how many and which restrictions apply.

Note. Future-dated service indicators will prevent service indicator buttons from appearing until their specified effective dates.

 (negative service indicator)

Appears on a page when a negative service indicator is assigned to and currently effective for the individual.

Click to access the Negative Service Indicators page where you can view details about the service restrictions associated with each negative service indicator for the individual.

 (positive service indicator)

Appears on a page when a positive service indicator is assigned to and currently effective for the individual.

Click to access the Positive Service Indicators page where you can view details about the service privileges associated with each positive service indicator for the individual.

There are several ways to review active service indicators. You can click the service indicator buttons to review an individual's service indicators as described. You can also select the service indicators whose details you want to review for an individual or you can view a summary of all the service indicators currently assigned to an individual.

If you have licensed the PeopleSoft Personal Portfolio Collaborative Application, students can also view their own active negative service indicator information on the self-service Holds page.

The system maintains an audit history of who applied which service indictors to which individuals, including add, change, and delete history. Use the Service Indicator Audits page to view a history of the service indicators that a person has assigned to records in your system.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Campus Community Security and Copying User Security," Setting Up Service Indicator Security

Chapter 40, "Using PeopleSoft Personal Portfolio Collaborative Application," page 509

Assigning or Removing Service Indicators

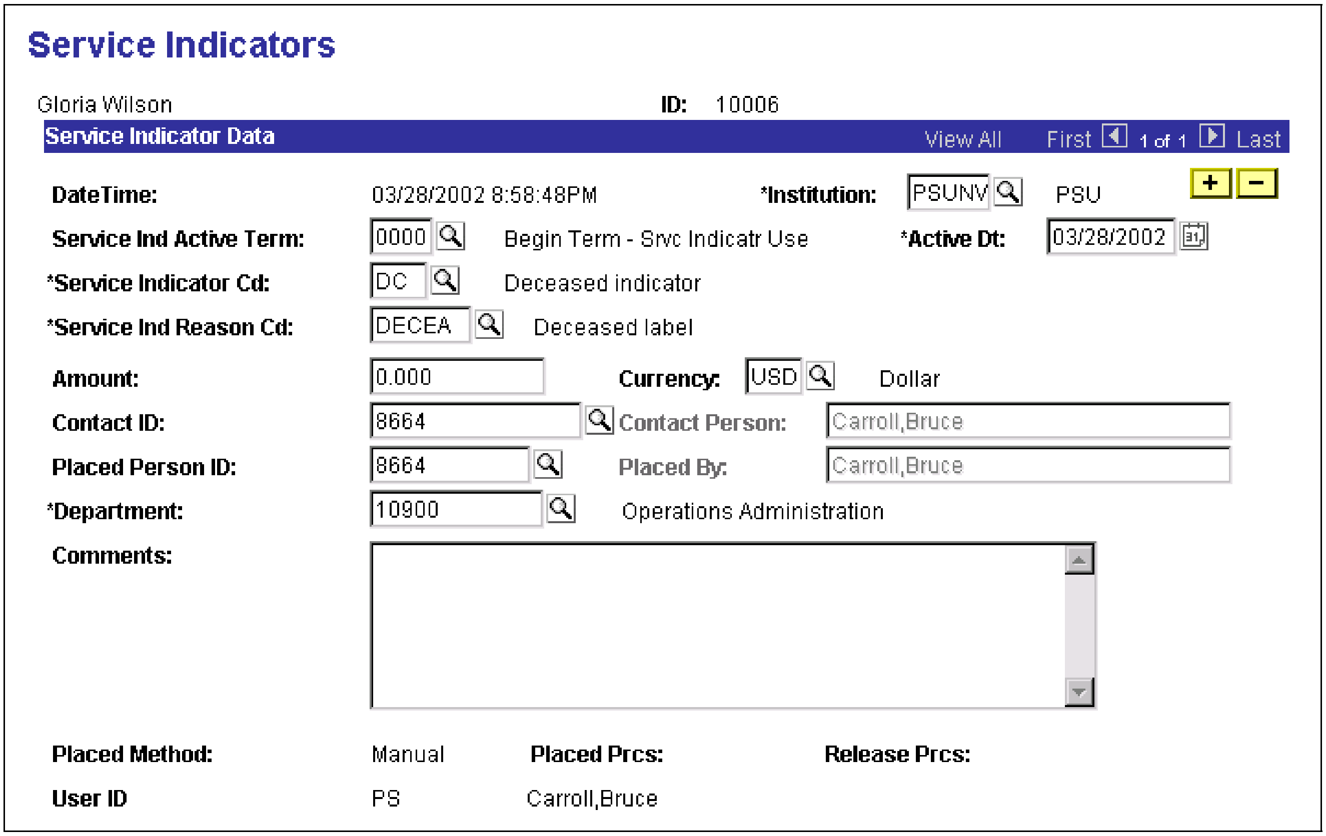
This section discusses how to assign or remove a service indicator.

Page Used to Assign or Remove Service Indicators

Page Name	Object Name	Navigation	Usage
Service Indicators	SRVC_IND_DATA1	Build Community, Service Indicators, Use, Service Indicator Data	Assign or remove a service indicator.

Assigning or Removing a Service Indicator

Access the Service Indicators page.



Service Indicators page

Institution

Specify the institution responsible for this service indicator.

Service Indicator Active Term

Indicates the single term for which this service indicator is valid.

Note. The Service Indicator Active Term field value is filtered by the Term Category field on the Service Indicator Codes page. If you no term category is entered on the Service Indicator Codes page, the system displays the default value of *0000* making the service indicator valid for all terms.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Active Date

Specify the date when the service indicator becomes active for this individual.

Service Indicator Reason Code

Select the reason why you are assigning this service indicator to the individual.

Note. Only the reason codes associated with the specific service indicator on the Service Indicator Codes page are available.

Amount

Enter the monetary amount, if any, required to satisfy the reason for this service indicator.

Currency Specify the currency in which the monetary amount is expressed.

Contact ID/Name Select the ID and name of the person to contact with questions about this service indicator and, in the case of a negative service indicator, to get the service indicator removed.

Placed Person ID/Name Specify the ID and name of the person who placed the service indicator—or requested that it be placed, on this individual's record.

Department Specify the department responsible for placing the service indicator—or that requested that it be placed, on this individual's record.

Comments Enter comments to further describe or identify the service indicator reason.

Placed Method If an automated process assigned this service indicator, *automated* appears. If the you assigned the service indicator manually, *manual* appears.

Placed Process The system displays the name of the automated process that placed this service indicator on the individual's record.

Release Process The system displays the name of the automated process that can release or remove this service indicator from the individual's record.

User ID The system displays the ID of the user who is entering or changing information on this page.

Reviewing Service Indicators

This section discusses how to:

- Review an individual's positive service indicators.
- Review an individual's negative service indicators.
- Review the details of an individual's service indicators.

Pages Used to Review Service Indicators

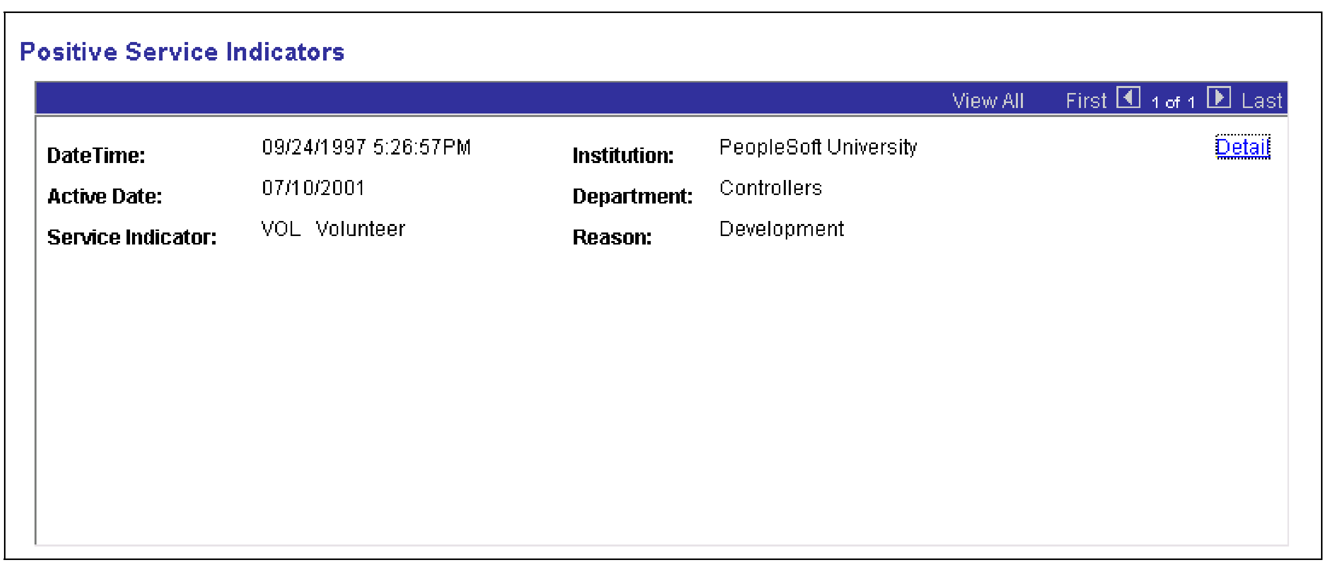
Page Name	Object Name	Navigation	Usage
Positive Service Indicators	SRVC_IND_SP	Click the positive service indicator button on any page about that individual.	Review an individual's positive service indicators for an individual.
Negative Service Indicators	SRVC_IND_SP	Click the negative service indicator button on any page about that individual.	Review an individual's negative service indicators.
Service Indicator Detail	SRVC_IND_SP3	Click the Detail link on the Negative Service Indicators page or the Positive Service Indicators page.	Review the details of an individual's service indicators, including the associated service impacts.

Page Name	Object Name	Navigation	Usage
Service Indicator Detail	SRVC_IND_DETAIL	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Service Indicators, Inquire, Active Service Indicators, Service Indicator Detail • Administer Financial Aid, Apply for Financial Aid, Inquire, Active Service Indicators, Service Indicator Detail • Manage Contributor Relations, Manage People, Inquire, Active Service Indicators, Service Indicator Detail • Manage Student Financials, Maintain Customers, Inquire, Active Service Indicators, Service Indicator Detail	View the details of each active service indicator currently assigned to an individual.

Page Name	Object Name	Navigation	Usage
Service Indicator Summary	SRVC_IND_SUMRY	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Service Indicators, Inquire, Active Service Indicators, Service Indicator Summary • Manage Contributor Relations, Manage People, Inquire, Active Service Indicators, Service Indicator Summary • Manage Student Financials, Maintain Customers, Inquire, Active Service Indicators, Service Indicator Summary • Administer Financial Aid, Manage Need Analysis, Inquire, Active Service Indicators, Service Indicator Summary • Administer Financial Aid, Package and Disburse Aid, Inquire 1, Active Service Indicators, Service Indicator Summary	View a summary of service indicators currently assigned to an individual.

Reviewing an Individual's Positive Service Indicators

Access the Positive Service Indicators page.



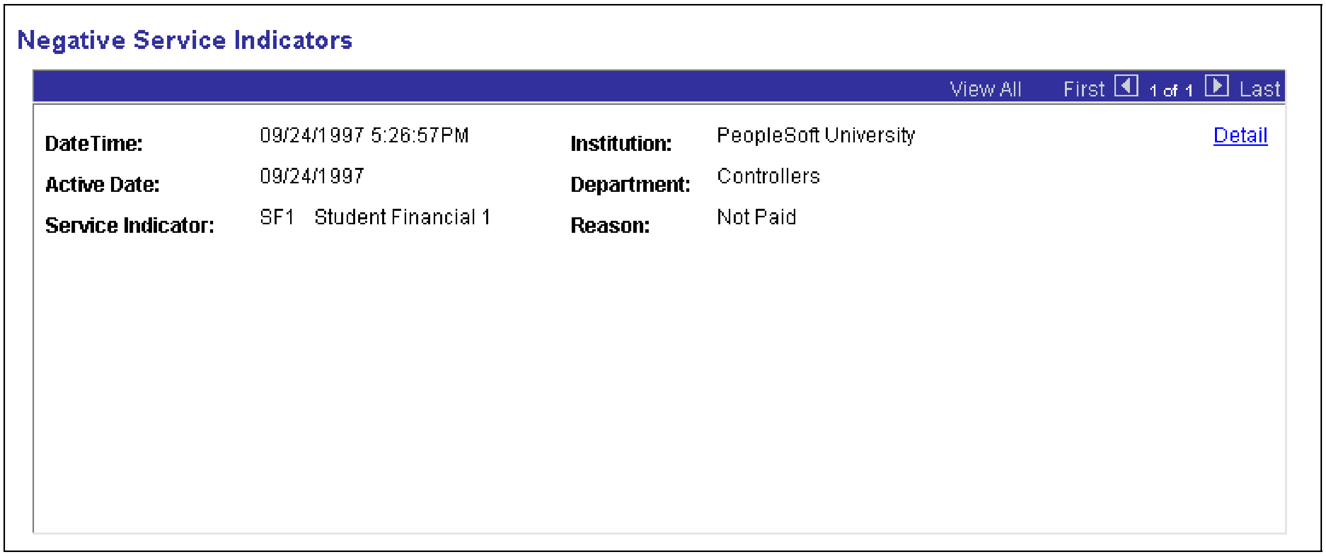
Positive Service Indicators page

Information displayed here is entered on the Service Indicator Codes page.

Detail Click to access the Service Indicator Detail page where you can view details about service indicators and their impacts.

Reviewing an Individual's Negative Service Indicators

Access the Negative Service Indicators page.



Negative Service Indicators page

Information displayed here is entered on the Service Indicator Codes page.

Detail Click to access the Service Indicator Detail page where you can view details about service indicators and their impacts.

Auditing Service Indicator History

This section discusses how to review a student's service indicator history.

Page Used to Review a Student's Service Indicator History

Page Name	Object Name	Navigation	Usage
Service Indicator Audits	RVC_AUDIT_DATA	Build Community, Service Indicators, Inquire, Service Indicator Audits	View a history of service indicators assigned by an individual.

CHAPTER 23

Understanding the 3Cs—Communications, Checklists, and Comments

The 3Cs—communications, checklists, and comments—are a flexible way to track and analyze correspondence, lists of requirements, and notes about the students, staff, constituents, and organizations in your database.

Communication management enables you to fully manage all types of contacts inside and outside your institution. Checklist management enables you to create lists of requirements and monitor their status. Comments creation enables you to attach notable remarks about individuals and organizations.

You can enter communications, checklists, and comments manually throughout your system. Or, with the 3C engine, you can define events and triggers to have the system add communications, add comments, and add or update checklists for individuals or organizations automatically from within your business processes.

Each of the 3Cs requires an administrative function and a 3C group.

The administrative function identifies the variable data associated with the specific category of communication, checklist, or comment. For example, the administrative function of ADMA, for Admissions [Application Level] identifies the Academic Career, Student Career Number, Application Number, and Application Program Number.

The 3C group provides user-level security access to categories of communications, checklists, and comments, while providing or restricting the user's ability to edit the data. For example, a security administrator might give a specific user 3C group security access to items in the Notice of Dismissal communication category, with an update only status so that he or she can view the data, but cannot modify it.

Buttons appear on many pages in your system to enable you to transfer directly from that page to another page within the same administrative function, to generate or review a communication, checklist, or comment for the individual or organization whose information you are currently viewing.

Common Elements Used in The 3Cs Chapters

 (communications)	Transfers you to the appropriate Communications Management page where you can review or create communications for the individual or organization. Communications include letters, phone calls, meetings, emails, and faxes.
 (checklists)	Transfers you to the appropriate Checklists Management page where you can review or create checklists for the individual or organization. Checklists may be lists of steps that must be performed, or documents that must be provided, or communications that are planned to occur, and so on.

 (comments)	Transfers you to the appropriate Comments page where you can review or enter comments regarding the individual or organization.

See Also

Chapter 26, “Managing Communications,” page 269

Chapter 27, “Managing Comments,” page 311

Chapter 28, “Managing Checklists,” page 323

Chapter 12, “Setting Up Administrative Functions,” page 105

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Securing Campus Community Security and Copying User Security,” Setting Up 3C Group Security

Chapter 24, “Using the 3C Engine,” page 241

Chapter 25, “Understanding Mass Change for 3Cs,” page 263

CHAPTER 24

Using the 3C Engine

This chapter provides an overview of the 3C engine and discusses how to:

- Define 3C engine events.
- Define 3C engine triggers.
- Set 3C engine security.
- View 3C triggers results.
- Specify mass change parameters.

Understanding the 3C Engine

The 3C engine is a rules-based PeopleSoft application engine that you can integrate with functional transactions to automatically insert or update communications, comments, and checklists records as you interact with students, suppliers, and employees. For example, you can eliminate to manually enter 3C information by using setting the 3C engine to automatically insert defined checklists, communications, and comments for prospects as you enter new admissions prospects to your system. You can use online business transactions to invoke 3C engine processing or you can use background integration with certain delivered programs.

Note. PeopleSoft delivers two background programs predefined and integrated with the 3C engine. PeopleSoft Contributor Relations Gift Acknowledgement process invokes the 3C engine to record results in the 3C engine trigger results table for background processing, and PeopleSoft Personal Portfolio Collaborative Application's User Profiles Management process invokes the 3C engine to record the realtime system communication inserts.

To use the 3C engine, you use administrative functions and detail data to define the rules (called engine events) to identify the sets of communication, checklists, and comments records that you want the engine to enter or update for you. Then, either set your own conditions (called triggers) to invoke the action of entering or updating your 3C records or use the predefined triggers delivered with your system.

If your institution licenses and uses PeopleSoft Personal Portfolio Collaborative Application, you can configure your system to record in realtime, the checklists that you want self-service users to be able to view in the To Do's list self-service transaction. For example, when a prospective student logs onto your self-service site to request application information about your school, after saving the request your system can record the checklist information that you specify in the engine event definition. When the prospective student logs in the next time, he or she can see the specific tasks that they must accomplish to complete your school's application process.

See Also

Chapter 40, "Using PeopleSoft Personal Portfolio Collaborative Application," page 509

Defining 3C Engine Events

This section discusses how to define 3C engine events and discusses how to:

- Define 3C engine events.
- Select joint rules compare fields.
- View communication keys.

Understanding 3C Engine Events

Define 3C engine events to set rules by which the system identifies the sets of communications, checklists, and comments records for the 3C engine to enter or update.

Prerequisites

Before using the 3C engine, you must set up communications, checklists, and comments. If you are going to use communication speed keys (Comm Keys), set those up first, too.

See Also

Chapter 13, "Setting Up Communications," page 111

Chapter 15, "Setting Up Checklists," page 129

Chapter 14, "Setting Up Comments," page 125

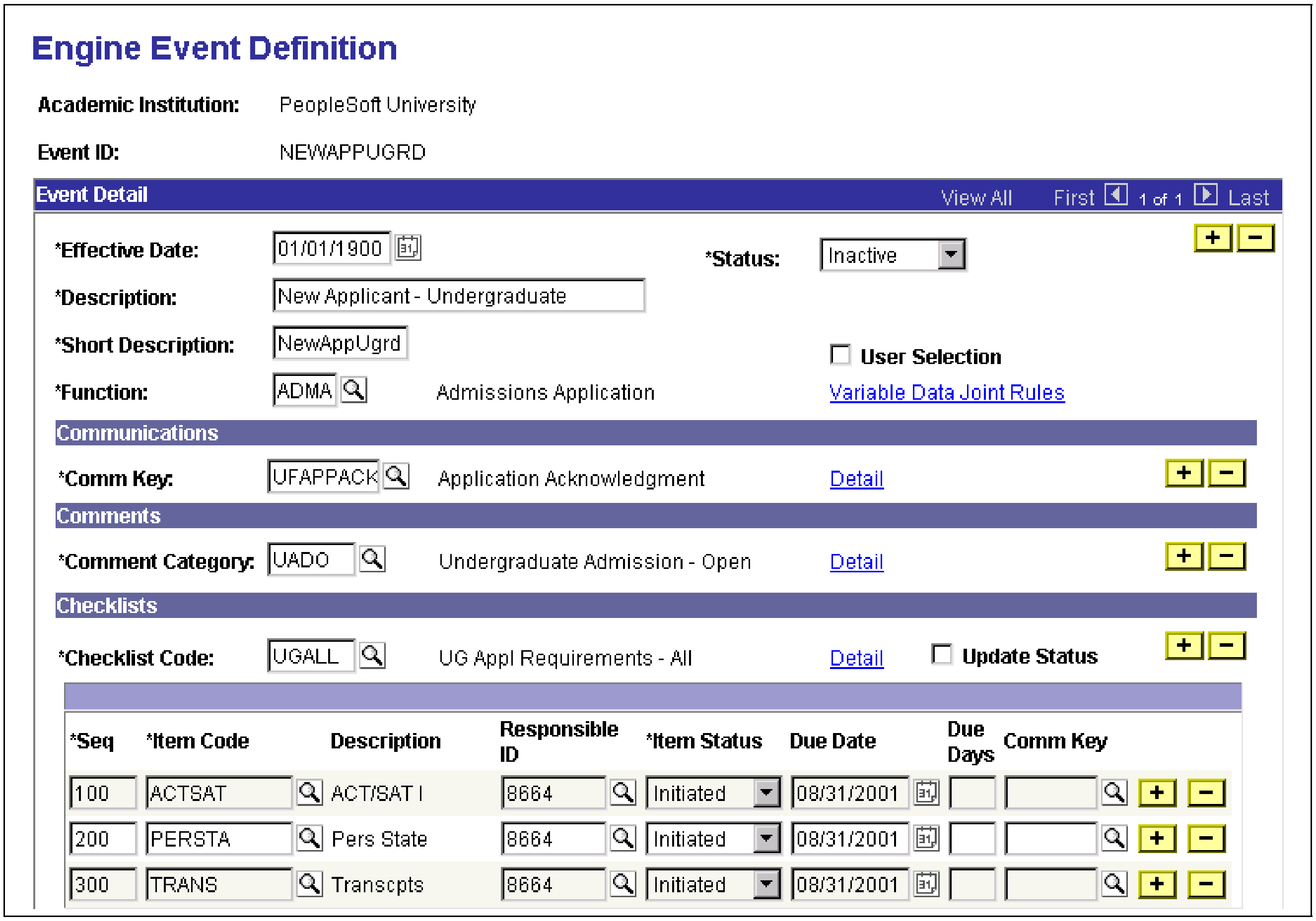
Chapter 13, "Setting Up Communications," Defining Communication Speed Keys, page 121

Pages Used to Define 3C Engine Events

Page Name	Object Name	Navigation	Usage
Engine Event Definition	EVNT_3CS_SETUP	Design Student Administration, Define Campus Community, Setup, Engine – Event Definition, 3C Engine – Event Definition	Define 3C engine events to identify or review the communications, comments, or checklists for the 3C engine to assign or update.
Joint Rules Compare Fields	EVNT_JRULES_AF	Design Student Administration, Define Campus Community, Setup, Event Definition Setup, Variable Data Joint Rules link	Select joint rules compare fields to identify variable data for the 3C engine to compare in determining and assigning joint communications.
Comm Key Detail (communication key detail)	EVNT_3CS_COMM_SEC	Design Student Administration, Define Campus Community, Setup, Event Definition Setup, Details link	View Communication Keys to determine or modify data for the communication to assign.

Defining the 3C Engine Events

Access the Engine Event Definition page.



Engine Event Definition page

Function

The functional area for this 3C engine event.

User Selection

Select to indicate that this 3C engine event definition is for transactions that allow users to select the communication, comment, and checklist to assign, in which case, the engine will assign only the communication, comment, and checklist specified by the user.

For example, if you license and use the Request Information self-service transaction in PeopleSoft Community Access Collaborative Application, you would select the User Selection option when defining a 3C engine event for the web prospects. That way, the prospects can select the communications that they want to receive.

When not selected, the engine assigns all communications, checklists, and comments identified in this 3C engine event.

Variable Data Joint Rules

Click to access the Joint Rules Compare Fields page, where you can select the variable data fields that you want the system to compare to determine and assign joint communications.

Communications

Comm Key

Enter the Comm Key to specify the communication to assign as part of this 3C engine event.

Detail

Click to access the Event Communication Detail page, where you can view or edit the details of the specified Comm Key.

Comments

Comment Category

The comment category for the comment to assign as part of this 3C engine event.

Detail

Click to access the Event Comment Detail page, where you can view or edit the details of the specified comment category.

Checklists

Checklist Code

The checklist code for the checklist to assign as part of this 3C engine event.

Update Status

Select to indicate that the 3C engine should update each checklist item to the specified status.

For example, you might include an item on your prospects checklist to require the assignment of a recruiter to each new prospect. You can create a 3C engine event definition to have the system automatically update that checklist item when you enter the new prospect into you database and assign the recruiter.

Sequence

The number of this item in the list of checklist items to be assigned as part of this 3C engine event.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of checklist items.

Item Code

The checklist item code, from Checklist Item Functions page, for the checklist item to assign as part of this 3C engine event.

Responsible ID

The ID of the individual at your institution who is responsible for this checklist item.

Item Status

The status of the checklist items to assign as part of this 3C engine event.

Due Days

The number of due days associated with the checklist items to assign as part of this 3C engine event.

Due Date

The due date associated with the checklist item to assign as part of this 3C engine event.

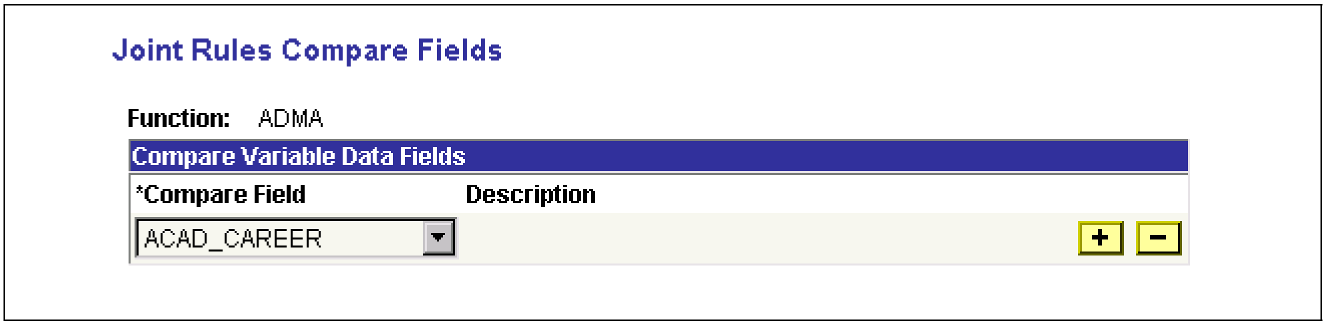
Comm Key

The Comm Key of the checklist to be assigned as part of this 3C engine event.

If the checklist to assign is of the default type that is set on the Installation Table − SA Options page (*Communications List* is the delivered default value), the system displays that Comm Key. You can override this to select a different Comm Key.

Selecting Joint Rules Compare Fields

Access the Joint Rules Compare Fields page.



Joint Rules Compare Fields page

Compare Field

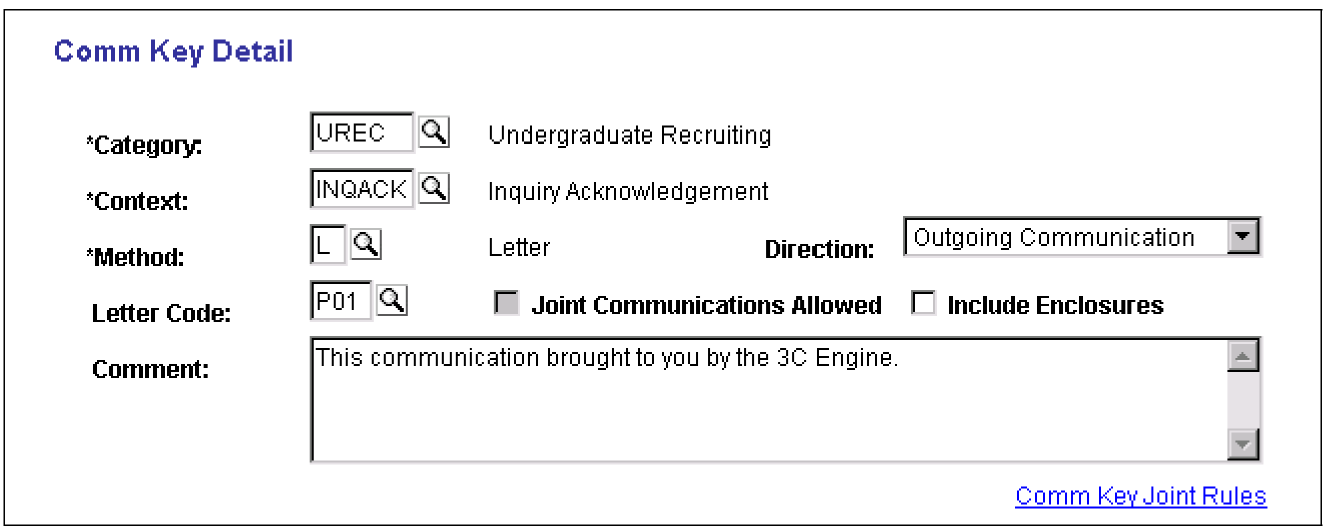
If you use joint communications, select the data fields to compare for any two related IDs that are set on the Relationships page to allow joint communications. When the compare finds the same variable data in these fields for both IDs, the condition triggers the assignment of a joint communication for the primary ID.

See Also

Chapter 26, “Managing Communications,” Understanding Joint Communications, page 272

Viewing Communication Keys

Access the Comm Key Detail page.



Comm Key Detail page

Data on this page comes from the Communication Speed Key page. You can accept the default data or you can change it. Changing the data here modifies what the 3C engine will assign to individuals or organizations for the Comm Key that you specify. It does not change the data on the Communication Speed Key page.

For example, you might use a particular Comm Key to manually assign communications. You can also use that Comm Key on the 3C event definition, and if you want to make changes that affect only the individuals or organizations to whom the 3C engine assigns communications, you can. Perhaps you have a special condition that occurs and you want to include a special comment on the communication record for those recipients. When you add that comment here, only the communications assigned by this event definition will have that comment. Your original Comm Key data remains unchanged.

Defining 3C Engine Triggers

This section provides an overview of 3C engine triggers and discusses how to:

- Map trigger prompts.
- Identify trigger conditions.

Understanding 3C Engine Triggers

Online triggers are conditions that you define to indicate when to invoke 3C engine processing. You can define triggers to occur in realtime or to store in a trigger table for background processing later. Triggers are table specific. They identify record or field level conditions and associate the 3C engine event definition to use when the trigger conditions are met by creating, changing, or deleting data in your system.

The 3C engine online triggers are integrated with your system by using a PeopleCode function. The function evaluates certain key variable information provided in the PeopleCode placed in the transactional locations. You must define certain variable assignment values when you place this PeopleCode in other records or components. The following PeopleCode example identifies and describes these variables.

```
Declare Function Trigger3CEngine PeopleCode FUNCLIB_CS.EVENT_3CS_ID FieldFormula;

PanelGroup string &ID, &RECNAME, &ACTION, &OVERRIDE, &VAR_DATA, &INSTITUTION;

&ID – "ID field (EMPLID / EXT_ORG_ID / BOTH)   "
&RECNAME – "Record Name"
&ACTION – "Trigger action (New / Changed / Deleted)"
&OVERRIDE – "If you want to skip the trigger condition check, set this value to 'Y'"
&VAR_DATA – "If variable data is included in the trigger, set this value to 'Y'"
&INSTITUTION – "The institution field on the record, or specify RECORD.FIELD location
 where institution value can be found"
```

For example, the Trigger3CEngine function call placed on the ADM_APPL_PROG record in your system has the following variable assignments.

```
Declare Function Trigger3CEngine PeopleCode FUNCLIB_CS.EVENT_3CS_ID FieldFormula;

PanelGroup string &ID, &RECNAME, &ACTION, &OVERRIDE, &VAR_DATA, &INSTITUTION;

&ID = "EMPLID";
&RECNAME = "ADM_APPL_PROG";
```

```
&ACTION = "C";
&OVERRIDE = "N";
&VAR_DATA = "Y";
&INSTITUTION = INSTITUTION;
Trigger3CEngine();
```

PeopleSoft delivers some predefined 3C engine PeopleCode function calls. You can use the EmplID (SavePostChange) field on the following records:

- ADM_APPL_DATA
- ADM_APPL_PROG
- ADM_PRSPCT_CAR
- ADM_PRSPCT_PROG
- ADM_web_PRS_CAR

You can configure your system to provide 3C engine integration in other areas by placing the PeopleCode function call in the appropriate records or components as follows:

- Place the Trigger3CEngine function call in any record or component-record location.
- Place the Trigger3CEngine function call only in the SavePostChange PeopleCode event.
- Place the Trigger3CEngine function call only in locations where a person ID (EMPLID or similar field) or organization ID (EXT_ORG_ID or similar field) is included in the component.

After you identify and place the appropriate Trigger3CEngine function, you must define the online triggers.

You can view 3C engine triggers in the Trigger Result table before running the 3C engine trigger background process. You can also add individuals or organizations to the trigger table before initiating the background assignments.

Trigger definitions set to process assignments in background add rows to the Trigger Result page as users perform the business transactions which meet the trigger conditions. For example, you can define a trigger to invoke the 3C engine when a new applicant is added. If you set the process mode to *batch* for the trigger, each time a new applicant is added to your database, the 3C engine inserts a row on the Trigger Result page for the new applicant.

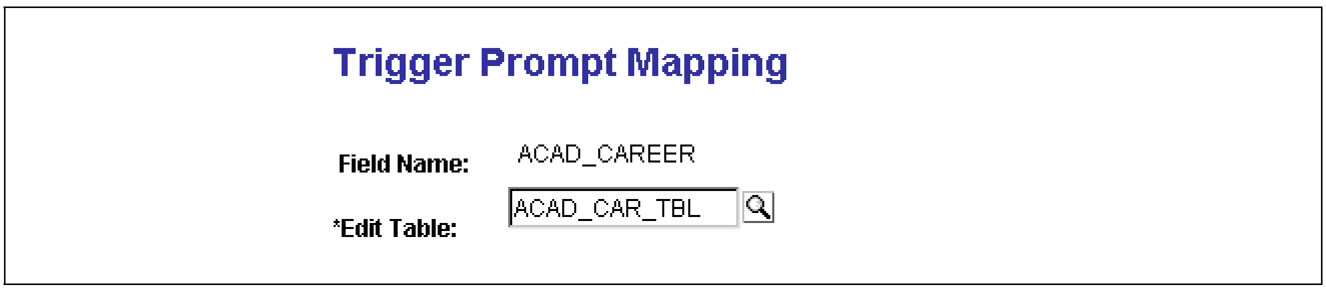
Note. Trigger definitions set to *system* mode do not add rows to the Trigger Result table as business transactions are performed.

Pages Used to Define 3C Engine Triggers

Page Name	Object Name	Navigation	Usage
Trigger Prompt Mapping	TRGR_PROMPT_TBL	Design Student Administration, Define Campus Community, Setup, Engine – Trigger Prompt Table, 3C Engine – Trigger Prompt	Map trigger prompts identifying the edit table to use with the trigger fields.
Engine Trigger Definition	TRGR_3CS_ON_SETUP	Design Student Administration, Define Campus Community, Setup, Engine – Trigger Definition, 3C Engine – Trigger Definition	Identify trigger conditions to invoke the 3C Engine.

Mapping Trigger Prompts

Access the Trigger Prompt Mapping page.



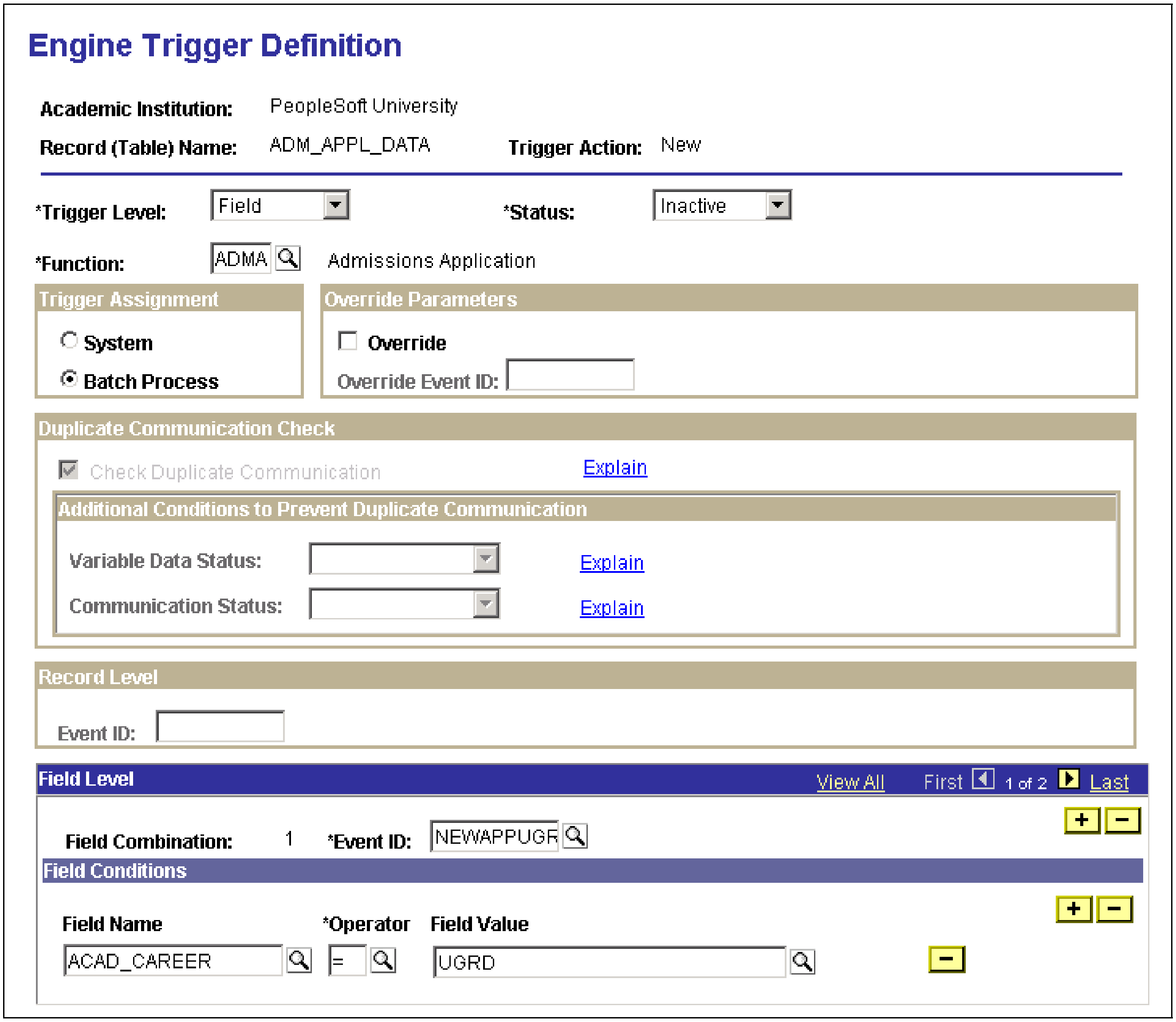
Trigger Prompt Mapping page

Edit Table The source record to which the system should map to make fields available to use as field conditions on the Engine Trigger Definition page. Mapping to an edit table is optional.

For example, to make academic career (ACAD_CAREER) values available from the Engine Trigger Definition page, map to the Academic Career Table (ACAD_CAR_TBL).

Identifying Trigger Conditions

Access the Engine Trigger Definition page.



Engine Trigger Definition page

Trigger Action The action of *New (add), Change,* or *Delete* that you selected to define or review. This is the action that must occur as described on this page to invoke the 3C engine.

Trigger Level The level at which this trigger action must occur to invoke the 3C engine.

Record: The specified trigger action on the row invokes the 3C engine process, regardless of field. You must specify the 3C engine Event ID to process for a record level trigger.

Field: The specified trigger action on the field invokes the 3C engine process. You must specify the Event ID to process and the fields on which the specified action occurs, will invoke the 3C engine.

Function The administrative functional area for this event trigger.

Trigger Assignment

System — Select to indicate that the system should insert or update in realtime, the communications, comments, and checklists specified in the 3C engine event ID.

Batch Process — Select to indicate that when the specified action occurs to the record or field specified, the system should insert a row on the Engine Trigger Results page for use by 3C engine background processing later.

Override Parameters

Override — Select to indicate that the 3C engine should not use the field or record conditions identified on this page, but should instead, use the logic configured around the Function Trigger3CEngine PeopleCode on the record or component location. You must specify the override 3C engine event ID.

Override Event ID — The 3C engine event to process when the Override option is selected.

Duplication Communication Check

Check Duplicate Communication — The 3C engine event that determines if a communication is a duplicate and assigns or prevents assignment according to defined conditions.

See Chapter 24, “Using the 3C Engine,” Managing Duplicate Communication Assignments, page 259.

Record Level

Event ID — The 3C engine event to process when the trigger level is record.

Field Level

Field Combination — The system displays the next sequential field combination for each field level event ID that you add.

Event ID — The 3C engine event to process when the trigger level is field and the specified field conditions are met.

Field Conditions

You can define multiple field combination conditions. When the specified trigger action meets any of the conditions, the 3C engine processes the specified field level 3C engine event.

Field Name — The field on the specified record that, when this trigger action is performed, must meet the specified condition to invoke the 3C engine.

Operator — The conditional operator for this field condition, and the value that it modifies, for example, the admission term field (ADMIT_TERM) must be greater than or equal to 0390 (March 1990).

Values for this field are delivered with your system as translate values. You can modify these translate values.

< Less than

<= Less than or equal to

<> Not equal

= Equal to

> Greater than

>= Greater than or equal to

IN: In

Setting 3C Engine Security

This section provides an overview of 3C engine security and discusses how to assign engine event 3C groups.

Understanding 3C Engine Security

You use 3C groups to set security for 3C engine events just as you do to set security for communications, checklists and comments outside of the scope of the 3C engine. A user can then trigger only the events within the 3C group to which he or she is assigned. When the trigger is invoked online, the PeopleCode function assigns only those engine events for which that user has inquiry or update access. If the user does not have security access for the engine event, the system ignores the assignment. 3C group security applies to online event assignment only.

See Also

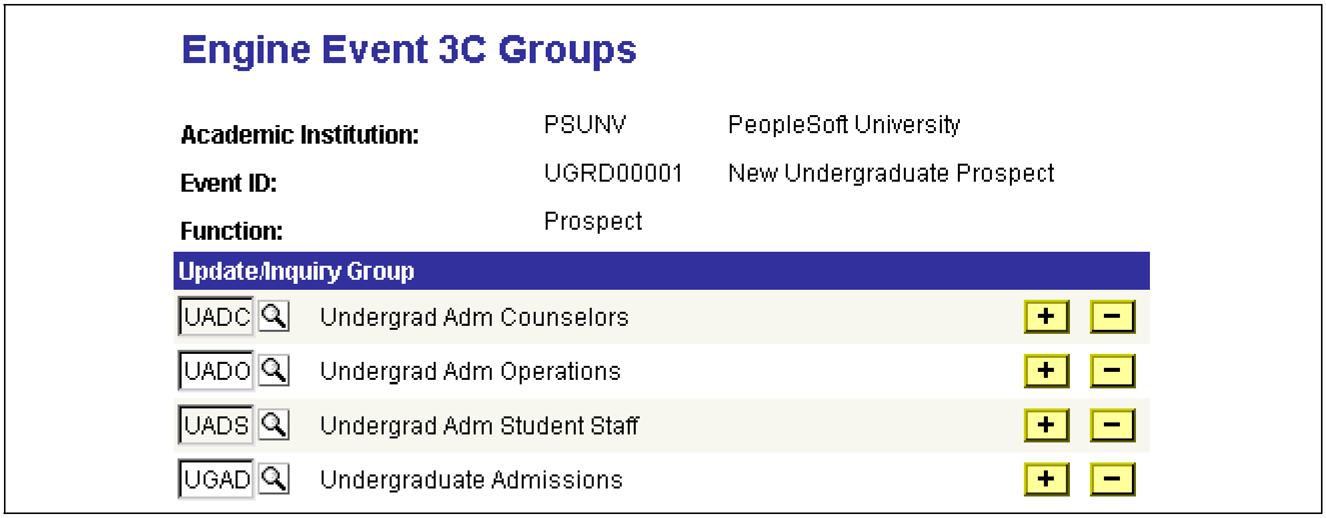
PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Campus Community Security and Copying User Security," Setting Up 3C Group Security

Page Used to Set 3C Engine Security

Page Name	Object Name	Navigation	Usage
Engine Event 3C Groups	EVNT_GRP_3C_TABLE	• Design Student Administration, Define Campus Community, Setup, Engine – Event 3C Groups, 3C Engine – Event Security • Design Student Administration, Define Contributor Relations, Setup, Event 3C Groups, 3C Engine – Event Security	Assign engine event 3C groups to assign security to 3C engine event definitions.

Assigning Engine Event 3C Groups

Access the Engine Event 3C Groups page.



Engine Event 3C Groups page

Viewing 3C Engine Trigger Results

This section discusses how to view 3C engine trigger results.

Understanding Trigger Results

You can review the 3C engine triggers in the Trigger Result table before running the 3C engine trigger background process to assign the communications, checklists, and comments in batch. You can also add individuals or organizations to the trigger table before initiating the batch assignments.

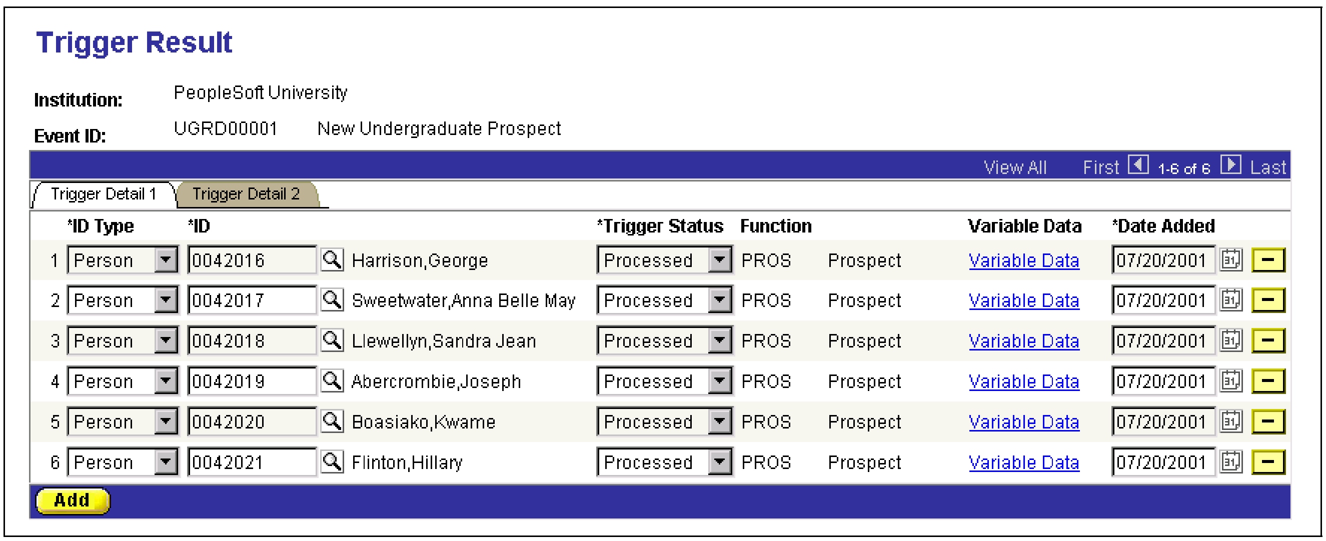
Trigger definitions set to process assignments in batch, add rows to the Trigger Result page as users perform the business transactions that meet the trigger conditions. For example, you can define a trigger to invoke the 3C engine when a new applicant is added. If you set the process mode to batch for this trigger, each time a new applicant is added to your database, the 3C engine inserts a row for the applicant on the Trigger Result page.

Pages Used to View 3C Engine Trigger Results

Page Name	Object Name	Navigation	Usage
Trigger Result Table	TRGR_3CS_TABLE	• Build Community, Checklists, Inquire, Engine Trigger Table, Trigger 3Cs Table • Build Community, Communications, Inquire, Trigger 3Cs Table, Trigger 3Cs Table	View trigger results to determine the individuals or organizations to which the 3C engine background process will assign the communications, comments, or checklists.
Variable Data	TRGR_PROS_SEC	Click the Variable Data link on the Trigger Result page – Trigger Detail 2 tab.	View or change the variable data for the targeted individual or organization.

Viewing Trigger Results

Access the Trigger Result page.



Trigger Result page – Trigger Detail 1 tab

Trigger Detail 1 tab

ID Type The type of ID, either *Person* or *Organization.*

ID The ID of the person or organization for the 3C engine to process.

Trigger Status The processing status of the trigger for the specified individual or organization. The default trigger status is *Process*. You can change the trigger status.

Values for this field are delivered with your system as translate values. You should not modify the delivered values, but you can add others.

Cancelled: Prevents the 3C engine from including this individual or organization in the background process.

Process: The 3C engine should include this individual or organization in the background process. (Default)

Suspense: Prevents the 3C engine from including this row in the background process. Use this trigger status to temporarily disable a row from being processed if you need to investigate. You can then reset the trigger status *Process* to include it in the next run of the process.

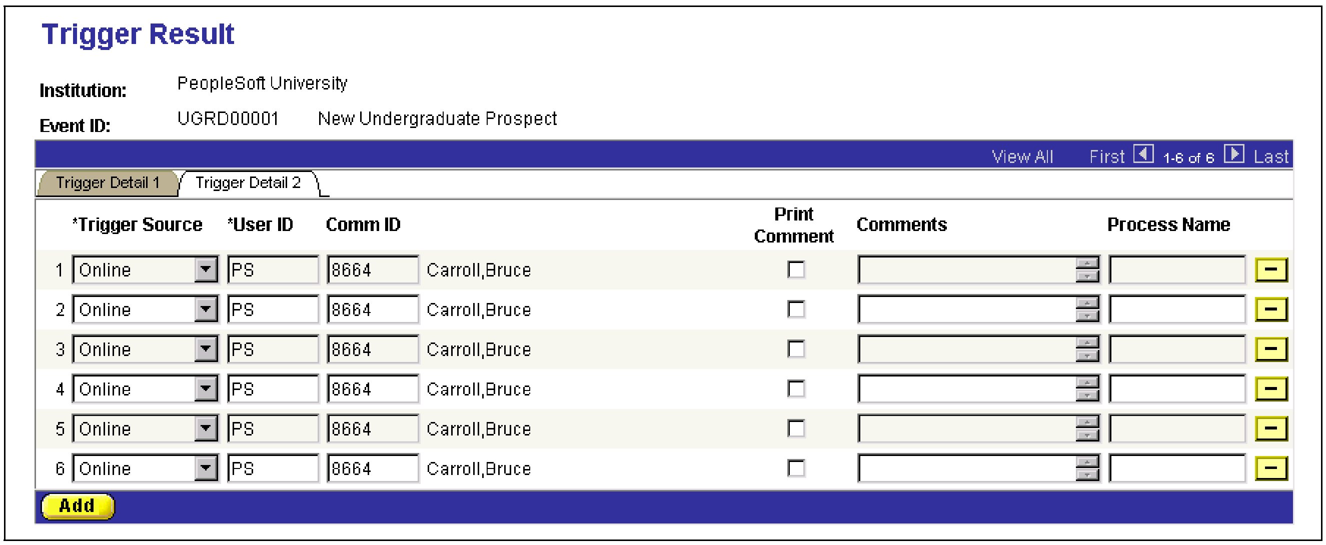
Function The administrative functional area of this 3C engine event.

Variable Data Click to access the Variable Data page where you can view or change the variable data associated with this individual or organization.

Date Added The default date is current system date.

Viewing Additional Trigger Result Details

Access the Trigger Result page, Trigger Detail 2 tab.


Trigger Result

Institution: PeopleSoft University

Event ID: UGRD00001 New Undergraduate Prospect

View All First 1-6 of 6 Last

Trigger Detail 1 | Trigger Detail 2

	*Trigger Source	*User ID	Comm ID		Print Comment	Comments	Process Name
1	Online	PS	8664	Carroll,Bruce			
2	Online	PS	8664	Carroll,Bruce			
3	Online	PS	8664	Carroll,Bruce			
4	Online	PS	8664	Carroll,Bruce			
5	Online	PS	8664	Carroll,Bruce			
6	Online	PS	8664	Carroll,Bruce			

Add

Trigger Result page – Trigger Detail 2 tab

Trigger Detail 2

Trigger Source The source that determines the individuals or organizations to include in the process.

Batch: The system automatically sets the trigger source to this value when the 3C engine background process, processes this ID.

Online: The system automatically sets the trigger source to this value when a business transaction within the system triggers the 3C engine to process this individual.

User: The system automatically sets the trigger source to this value when you click Add to add a row and enter an additional ID on the Trigger Detail 1 tab page.

User ID The ID of the user performing the business transaction that invoked the 3C engine trigger or the ID of the user who initiated the run of the process that resulted in the addition of this row.

Comm ID The ID of the individual responsible for assigning this trigger.

Print Comment Select to indicate that the comments here should be included in the Letter Generation data extract process.

Comments The system displays the comments from the Event Definition detail page. You can change the comments and add enter additional comments.

Process Name The name of the process that invoked the 3C engine trigger.

Running the 3C Engine Process

This section provides an overview of the 3C engine process and discusses how to:

- Select the events to process in the background.
- Specify mass change parameters.
- Manage duplicate communication assignment.

Understanding the 3C Engine Process

Use PeopleSoft Process Scheduler to run the 3C engine background process and process 3C events in the background at a future time. You can run the process on the trigger table results, on mass change definitions, or on both.

When you run the background process on trigger table results, the communications, comments, and checklists identified by the 3C engine event are added or updated for the individuals or organizations specified in the rows on the Trigger Result page.

When you run the background process on mass change groups or definitions, the 3C engine uses the selection criteria definition and certain other mass change definitions to identify the individuals or organizations for which to add or update communications, checklists, and comments.

You can also specify conditions for the 3C engine to prevent assignment of duplicate communications.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Using PeopleSoft Process Scheduler”

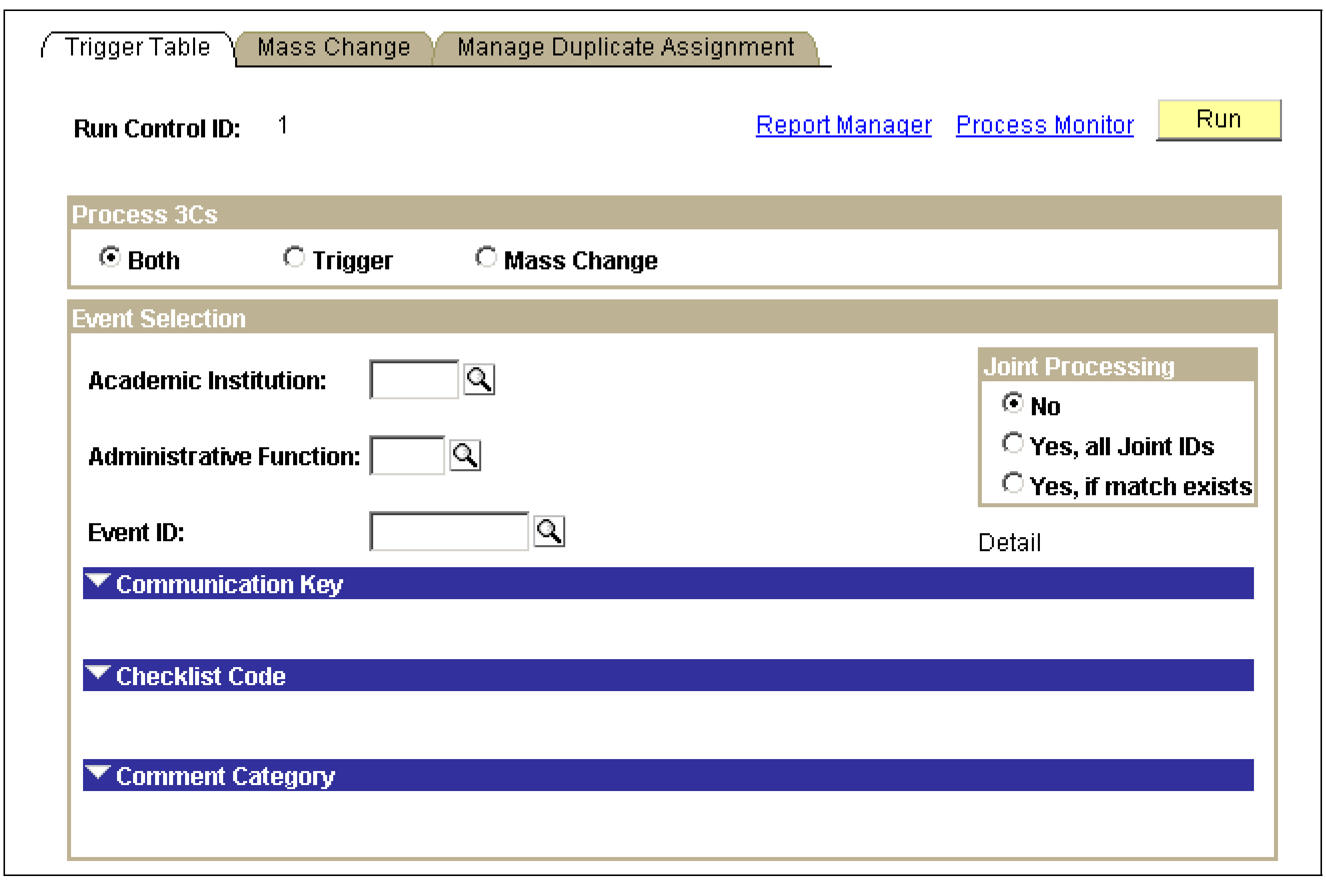
Pages Used to Run the 3C Engine Process

Page Name	Object Name	Navigation	Usage
Trigger Table	RUN_CNTL_3CENGINE	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Checklists, Process, 3C Engine, Trigger Table • Build Community, Communications, Process, 3C Engine, Trigger Table • Build Community, Comments, Process, 3C Engine, Trigger Table • Manage Contributor Relations, Manage People, Process, 3C Engine, Trigger Table	Select the events for the 3C engine process to process in the background.
Mass Change	RUN_CNTL_3C_MC	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Checklists, Process, 3C Engine, Mass Change • Build Community, Communications, Process, 3C Engine, Mass Change • Build Community, Comments, Process, 3C Engine, Mass Change • Manage Contributor Relations, Manage People, Process, 3C Engine, Mass Change	Specify mass change parameters to update communications.

Page Name	Object Name	Navigation	Usage
Manage Duplicate Assignment,	MANAGE_DUP_ASSIGN	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Process, 3C Engine, Manage Duplicate Assignment • Build Community, Checklists, Process, 3C Engine, Manage Duplicate Assignment • Manage Contributor Relations, Manage People, Process, 3C Engine, Manage Duplicate Assignment	Specify conditions for preventing duplicate communication assignment.

Selecting the Events to Process

Access the Trigger Table page.



Trigger Table page

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler Request page, where you can specify where a process or job runs and the process output format.

Process 3Cs

Both	Select to indicate that the 3C engine background process should process, in the background, both the rows on the Trigger Result page in the background, and the mass change group ID data specified on the Mass Change page in this component.
Trigger	Select to indicate that the 3C engine background process should process, in the background, only the rows on the Trigger Result page.
Mass Change	Select to indicate that the 3C engine background process should process in the background, the mass change group ID data specified on the Mass Change page in this component.

Event Selection

Academic Institution	The institution whose data that this program should process.
Administrative Function	The administrative functional area of the data that this program should process.
Event ID	The 3C engine event ID that this program should process.

Joint Processing

No	Do not apply joint communication rules in this process.
Yes, All Joint IDs	Include all communications set to allow joint communications.
Yes, if match exists	Include joint communications only when date in the variable data fields match.

Communication Key

Specify the Comm Key for the communication that this program should add or update.

Checklist Code

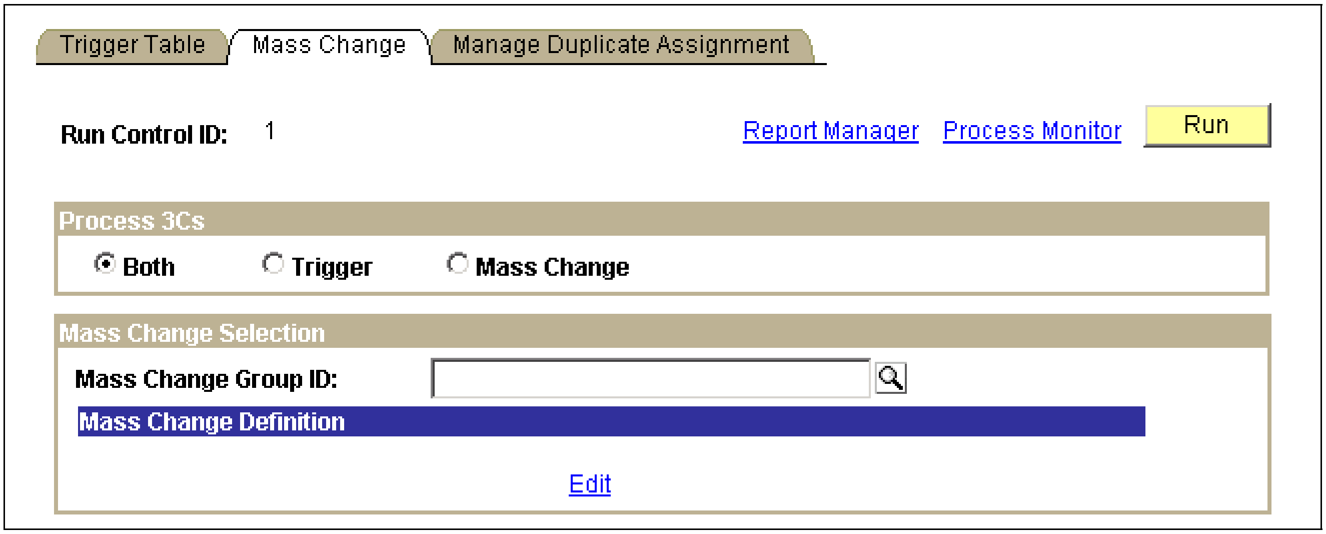
Specify the checklist code that this program should add or update.

Checklist Item

Specify the checklist item that this program should add or update.

Specifying Mass Change Parameters

Access the Mass Change page.



Mass Change page

Process 3Cs

Both Select to indicate that the 3C engine background process should process, in the background, both the rows on the Trigger Result page in the background, and the mass change group ID data specified on the Mass Change page in this component.

Trigger Select to indicate that the 3C engine background process should process, in the background, only the rows on the Trigger Result page.

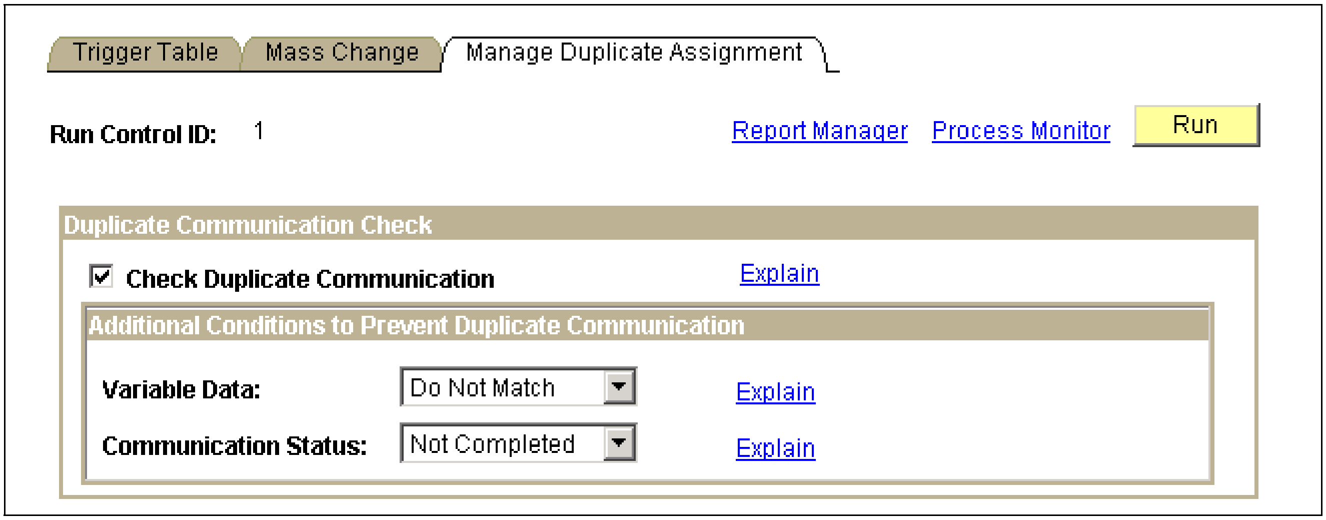
Mass Change Select to indicate that the 3C engine background process should process in the background, the mass change group ID data specified on the Mass Change page in this component.

Mass Change Selection

Mass Change Group ID The group ID to process.

Managing Duplicate Communication Assignments

Access the Manage Duplicate Assignment page.



Manage Duplicate Assignment page

Click the Explain link beside any item to display a message explaining the options and function of that item.

Duplicate Communication Check

Check Duplicate Communication

Select this check box to require the 3C engine to determine if a communication is a duplicate before assigning it. When this is selected and no additional conditions are specified, the engine will not assign the duplicate if it finds that a communication of that letter code is already assigned.

When this check box is not selected, the engine will assign the communication, whether or not it is a duplicate.

Additional Conditions to Prevent Duplicate Communication

Enter values in this area to specify whether the engine should compare variable data and status to further identify duplicates and prevent assignment.

Variable Data

Specify variable data conditions under which duplicates should not be assigned.

Match: If the communications are the same and they have matching variable data, do not assign the communication.

Do Not Match: If the communications are the same, and their variable data are different, do not assign the communication.

(Blank): Do not consider variable data.

Communication Status

Specify the status conditions under which duplicates should not be assigned.

Completed: If the communications are the same and the previously assigned communication is completed, do not assign the communication.

Not Completed: If the communications are the same and the previously assigned communication has been completed, do not assign the communication.

(Blank): Do not consider communication status.

Note. If a variable data and a communication status condition are both specified, then *both* conditions must be met to prevent assignment of the duplicate communication.

CHAPTER 25

Understanding Mass Change for 3Cs

Communications or checklists can be assigned to groups of individuals using mass change. For example, if you want to send a letter to all prospective students who are interested in veterinary science, you set up mass change definitions to select all of the students who fit those criteria and then assign the appropriate letter to them. Or, if you want to assign a requirements checklist to all applicants who submitted an application to your admissions office today, you set up mass change definitions to select all individuals who fit those criteria and then assign the appropriate checklist to them.

Associate the mass change definitions into a mass change group, and run the mass change background process using the 3C engine to assign the communication or checklist.

You must create new mass change definitions for the communications or checklists that you want to assign to groups. However, most mass change definitions can be set up based on sample mass change templates provided with your system.

The first step in assigning a communication or checklist to a group of individuals is to set up the appropriate mass change definition. While many generic mass change definitions are provided with your system, you must always create mass change definitions to define your primary and secondary selection criteria. Selection criteria enable you to define which individuals are to receive the communication or checklist that you assign.

Primary selection criteria provide the first round of selection, for example, all prospective students. A secondary selection criterion further identifies your primary selection. For example, you might have identified all of the prospective students in your system but now you need to identify all of those students who expressed an interest in veterinary science. For every communication or checklist that you assign using mass change, you must create a mass change definition that defines your primary selection criteria. Secondary selection criteria are optional.

Reviewing Mass Change

The following procedure and sample pages provide an example of using mass change to assign a communication. Use the same procedure to assign a checklist using mass change.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Using Mass Change"

Assigning a Communication Using Mass Change

Create a primary selection criteria mass change definition. Select Build Community, Communications, Use, Mass Change Definition, Description, and enter the name of the mass change definition to create.

1. Select a Mass Change Template. The Mass Change Template determines the fields that will be available on the Criteria and Defaults page.

   You can define your own templates on which to base your mass change definitions. However, several templates are provided with your system that should suffice for many communications you need to assign. All of the templates with names beginning with the word “Primary” were created for use as primary selection criteria mass change definitions. Primary selection criteria templates are provided for communications regarding Admissions, Financial Aid, and Events. The template used for this example is *Primary – ADMA/ADMP Comm Base.*

2. Select the Student Administration tab. Enter specific information to assist in prompting.

3. Select the Criteria and Defaults tab. Enter data necessary to select a communication and the individuals to whom it should be assigned.

   For example, when creating a mass change definition based on the Primary – ADMA/ADMP Comm Base template, the following selection criteria fields are available:

   ```
   ADM_APPL_DATA.ACADEMIC_LEVEL
   ADM_APPL_DATA.ACAD_CAREER
   ADM_APPL_PROG.ACAD_LOAD_APPR
   ADM_APPL_PROG.ACAD_PROG
   ADM_APPL_PROG.ACTION_DT
   ADM_APPL_PROG.ADMIT_TERM
   ADM_APPL_DATA.ADMIT_TYPE
   ADM_APPL_DATA.ADM_APPL_COMPLETE
   ADM_APPL_DATA.ADM_APPL_CTR
   ADM_APPL_DATA.ADM_APPL_DT
   ADM_APPL_PROG.CAMPUS
   ADM_APPL_PROG.EXP_GRAD_TERM
   ADM_APPL_DATA.FIN_AID_INTEREST
   ADM_APPL_DATA.HOUSING_INTEREST
   ADM_APPL_DATA.INSTITUTION
   ADM_APPL_DATA.LAST_SCH_ATTEND
   ADM_APPL_PROG.PROG_ACTION
   ADM_APPL_PROG.PROG_REASON
   ADM_APPL_DATA.RECRUITER_ID
   ADM_APPL_DATA.REGION
   ADM_APPL_PROG.REQ_TERM
   PERSONAL_DATA.BIRTHDATE
   PERSONAL_DATA.ETHNIC_GROUP
   PERSONAL_DATA.MARITAL_STATUS
   PERSONAL_DATA.MILITARY_STATUS
   PERSONAL_DATA.SEX
   ```

4. Select the fields on which to base the primary selection criteria and enter the appropriate values.

5. (Optional) To set up secondary selection criteria, create a separate mass change definition to run after the one that determines your primary selection criteria.

6. Scroll to the second SQL Statement mass change execution sequence on the Criteria and Defaults page, and identify an Administrative Function, Communication Key, and Academic Institution for use in generating the communication to be assigned. Also identify the person and department at your institution responsible for the communication and what the communication is about.

Note. If an individual in your database has a communication already assigned to him that matches any or all of the criteria for this definition, the system will not assign this communication to that individual. For example, if you are sending letters to prospective students with the administration function of PROS as part of your definition, the system will not assign this communication to any individual in your database who already has a communication with the administrative function of PROS.

7. Select the General SQL tab.
8. Select Build Community, Communications, Use, Mass Change Group, and place mass change definitions into groups with other, generic, mass change definitions so that they can be run together.

   Enter the mass change definitions in the order in which they must run. The following is an example of the sequence in which to run the communication mass change definitions:

   1: Communication—Delete Temp—A mass change definition is supplied with your system, which deletes any data remaining in the mass change temporary tables.

   2: <Primary Select>—The primary selection criteria mass change definition that you created.

   (Optional) <Secondary Select>— Any secondary selection criteria mass changes you may have created. Do not forget to make sure that they are in the correct order.

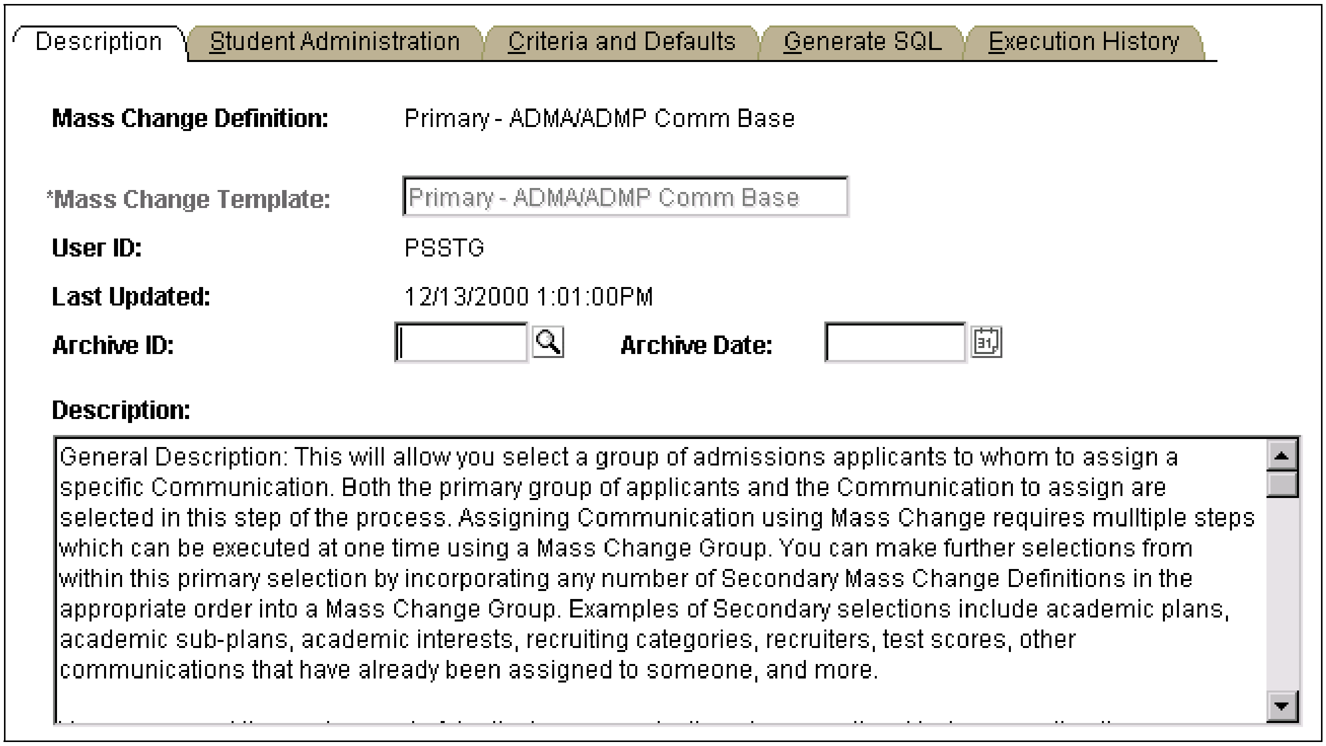
   3: Communication—Admin Function—A mass change definition supplied with your system which takes data from the temp table and makes sure that the correct variable data is populated based on the Administrative Function you specified in your Primary Select mass change.
9. Select Build Community, Communications, Inquire, Mass Change Result to access the Mass Change Results page.

   You can view the IDs and other data about individuals or organizations selected by the mass change definitions that were run. You can review IDs before finalizing the assignments to the database tables.

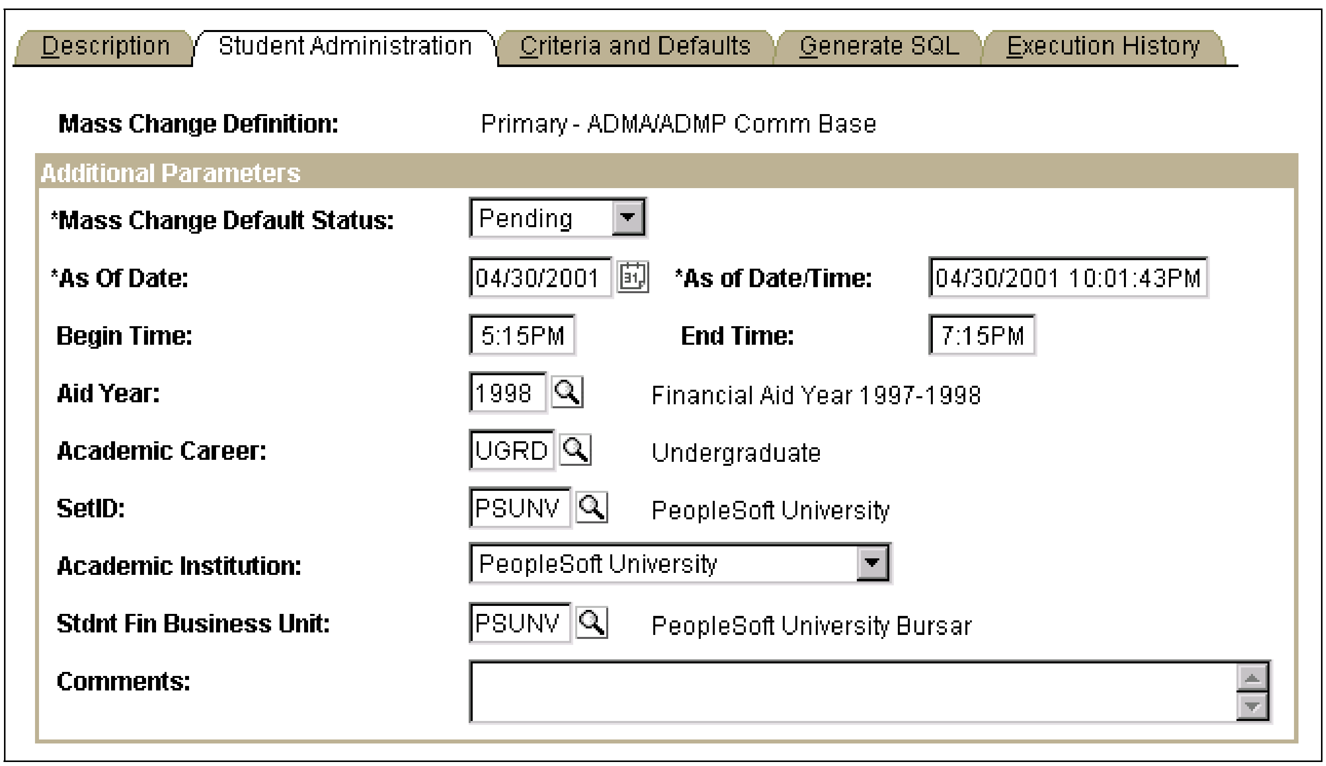
Note. The system displays results on the Mass Change Results page only when you run the Mass Change definition from the Mass Change run control page. When you run the Mass Change definition by itself or as part of a group using the 3C engine run control page, the process assigns the communications or checklists to the individuals or organization specified in the mass change definitions. However, after successful completion of the mass change assignment, the 3C engine deletes the rows from the Mass Change Results page.

Reviewing Sample Pages

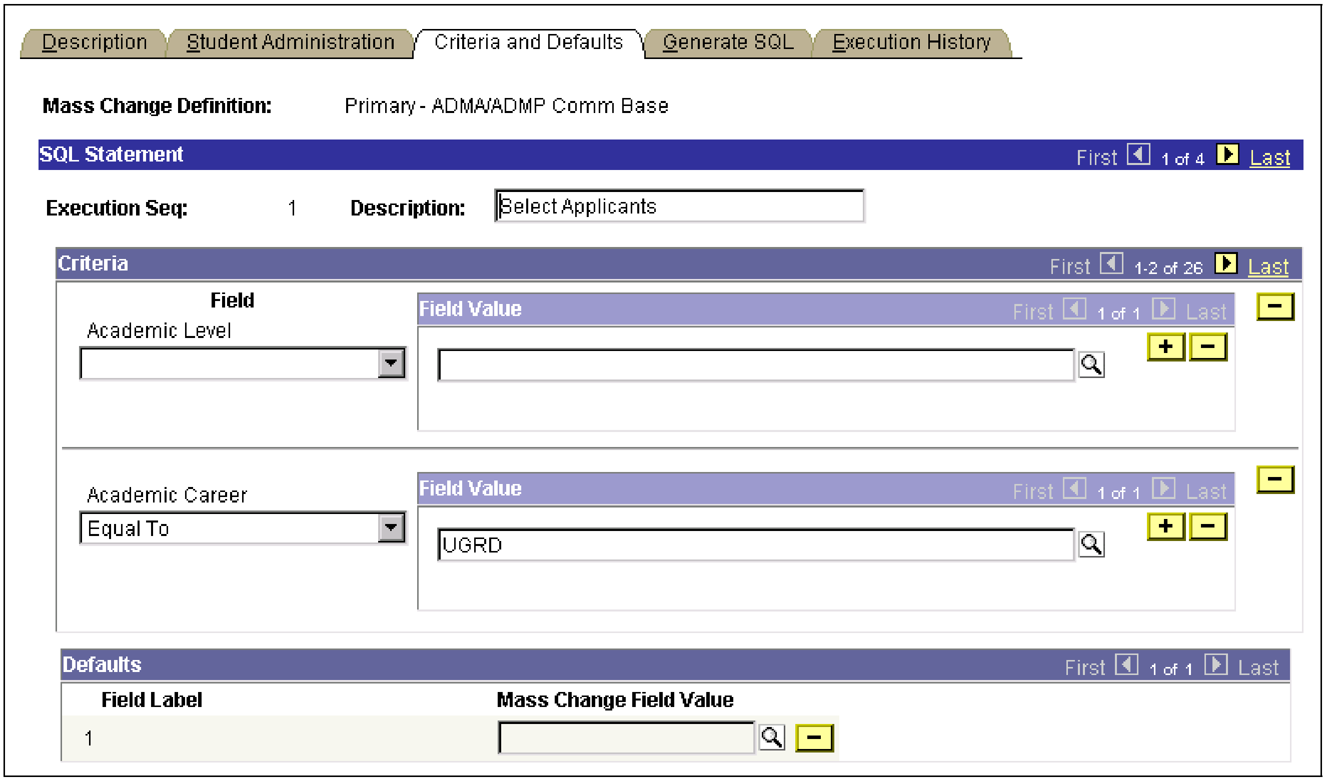
These sample pages show using mass change to assign a communication.



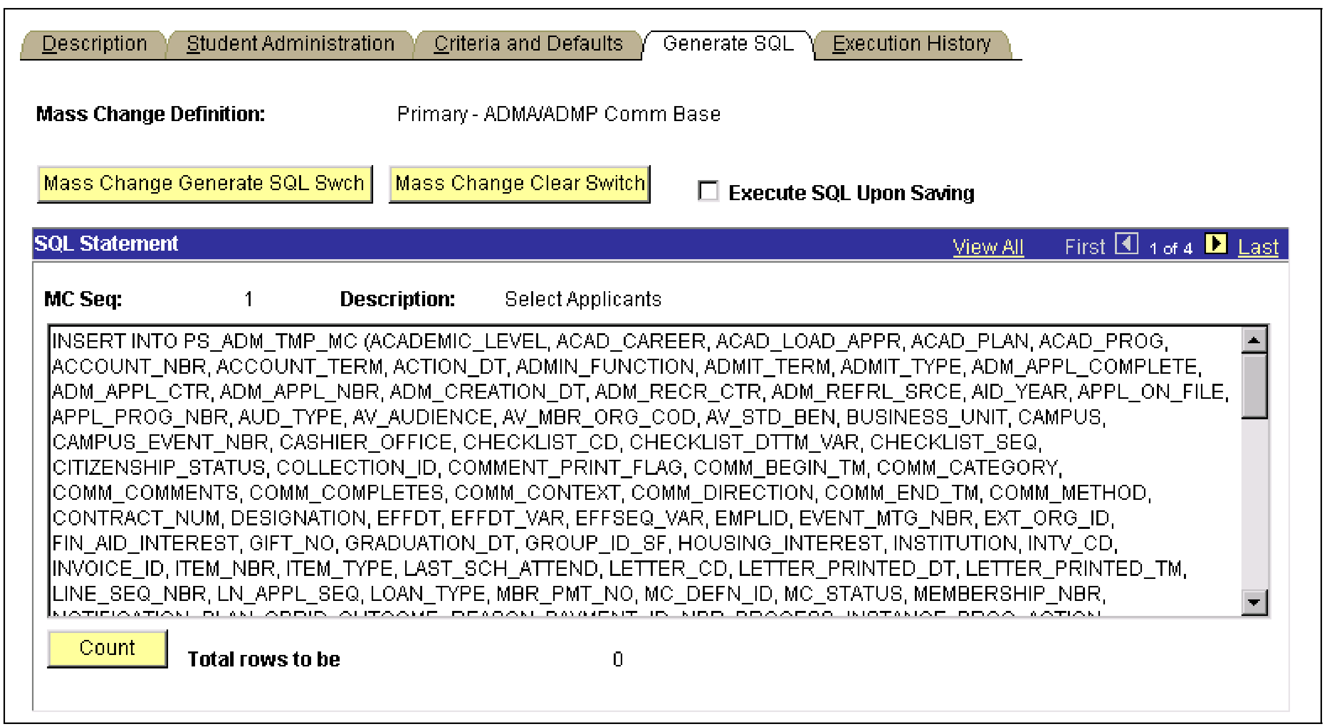
Using the Mass Change Definition – Description page (MC_DEFN_00)



Using the Mass Change Definition – Student Administration page (MC_DEFN_SA)



Using the Mass Change Definition − Criteria and Defaults page (MC_DEFN_01)



Using the Mass Change Definition − Generate SQL page (MC_DEFN_02)

Mass Change Group Definition

Mass Change Group ID: Communication - ADMA/ADMP Base

PS Owner: SA

Mass Change Definition List

Mass Change Sequence	*Mass Change Definition
1	Communication - Delete Temp
2	Primary - ADMA/ADMP Comm Base
3	Communication - Admin Function

Using the Mass Change Group Definition page (MC_GROUP_01)

Mass Change Result

Mass Change Definition: Primary - ADMA/ADMP Comm Base

View All First 1-100 of 530 Last

	ID		Comm Key	Institution	Function	Variable Data	User ID	DateTime
1	FA1070	PETRONE,ALEXANDRA T	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
2	FA1071	SCOTT,TAMERIN M	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
3	FA1072	STEWART,COURTNEY D	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
4	FA1073	WILLIAMS,MARCUS R	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
5	FA1074	Rahman,Nadem	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
6	FA1075	Fontaine,Marjorie	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
7	FA1076	Hancok,Bob	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
8	FA1077	Lee,Mariane	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
9	FA1078	Pham,Tosh	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
10	FA1079	Edmond,Tanya	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
11	FA1080	Sabaneghs,Marlow	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
12	FA1081	Curtus,Jason	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
13	FA1082	Peterson,Mike	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
14	FA1083	Greave,Clinton	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
15	FA1084	Taylor,Annetta	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
16	FA1085	Thod,Jozette	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
17	FA1086	Cart,Eric	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
18	FA1087	Charsly,Paula	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
19	FA1088	Kuocha,Erica	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
20	FA1089	Oons,Jason	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
21	FA1090	Kerr,Cordeli	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
22	FA1091	Shump,Phillip	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
23	FA1092	Fond,Robert	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
24	FA1093	McCaughy,Jeremy	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM
25	FA1094	Austyn,Tracy	UFAPPACK	PSUNV	ADMA	Variable Data	PS	07/20/2001 5:11:38PM

Viewing the Mass Change Result page (MC_COMM_RESULT)

CHAPTER 26

Managing Communications

This chapter provides an overview of communications and discusses how to:

- Assign communications to an individual.
- Assign communications to an organization.
- Extract letter data.
- Review communications with an individual.
- Review communications with an organization.
- Use the sample templates.

See Also

Chapter 23, “Understanding the 3Cs—Communications, Checklists, and Comments,” page 239

Chapter 24, “Using the 3C Engine,” page 241

Chapter 25, “Understanding Mass Change for 3Cs,” page 263

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Using Mass Change”

Prerequisites

Before assigning and managing communications, you must set up communications in your system.

See Also

Chapter 13, “Setting Up Communications,” page 111

Common Elements Used in This Chapter

(communications)	Click to transfer to where you can add a new communication for the individual or organization
(checklists)	Click to transfer to where you can add a new checklist for the individual or organization.

 (comments)	Click to transfer to where you can enter a new comment for the individual or organization.
View or Edit	Click to transfer to where you can view or edit the communication assignment. **Note.** The View link is available when the user has 3C group *inquiry* access for the communication category. The Edit link is available only when the user has 3C group *update* access for the communication category.

Understanding Communication Management

Communication Management enables you to track and analyze all of your institution's contacts with students, staff, constituents, and organizations inside and outside the institution. You can track the following:

- All incoming and outgoing communications.
- All types of communication—letters, email, phone calls, personal contact, facsimiles, and so on.
- Communications generated by other offices that affect your office.
- All staff involved with a communication.
- You can assign communications to individuals, organizations, and groups of people. This chapter describes how to assign communications.

To assign a communication, you must select the method, category, context, direction, and letter code for that communication to identify the who, what, when, and how of each communication. This is how they correlate:

- Method = How
- Context = What
- Category = Why
- Direction = Where
- Date = When
- ID = Who

Use the communication management pages to manually assign communications to individuals or organizations. You can access the communication management pages as described here, or you can access them by clicking the Communication button on pages throughout your system.

You can assign communications to individuals and organizations manually, or you can use the 3C engine to automatically assign communications to individuals or organizations based on rules and conditions that you define. You can also use mass change to assign communications to individuals. You can indicate whether the communication is a phone conversation, a letter, or an in-person meeting with the individual. If the communication is a letter, you can manage the variable data and enclosures that should be included, and enter comments that you can choose to print or not print in the letter.

In addition to creating communications for individuals, you can create communications for organizations. For example, you can send letters to schools announcing that an admissions counselor from your institution will be in their area on a certain date, or you can send bills to companies with which your institution does business.

When you are finished assigning letter communications, you can use your system to extract data about the recipients and use your word processing software to merge that data into a template. You create templates with your institution's word processing software, or you can use the sample Microsoft Word templates delivered with your system.

Use the inquiry pages to review communication information for an individual or an organization. You can enter criteria and search for a summary of communications or view details of the communication assignments. You can search for a summary of communications to determine if a specific communication was sent, if it included enclosures, and if it was a joint communication.

Note. You are able to view only those communications that are associated with the communication 3C groups to which you have security access. With 3C group inquiry access, you can view communication assignments, but you cannot change them. With 3C group update access, you can view and change the communications. Use the Operator 3C Groups Summary page to determine or change an individual's 3C group security status.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Setting User Defaults," Selecting the Type of 3C Group Access.

The following procedure provides a high level overview of the managing communications processes and the order in which they must be performed. Steps 1 through 5 are described in Setting Up Communications.

To generate and manage communications:

1. Set up codes for the standard letters that your institution wants to use.

   Each letter requires an administrative function.

2. Set up communication contexts.

   Contexts include methods, directions, and letter codes.

3. Set up communication categories.

   Categories are sets of communication contexts.

4. Set up communication 3C groups.

   3C groups are required for assigning security access for communications.

5. (Optional) Set up communication speed keys (Comm Keys).

   Comm Keys enable you to associate communication elements together and access them as a set, using the assigned shortcut code.

6. Assign communications to individuals, organizations, or events.

   You can assign communications to each of these manually. For communications to individuals or organizations, you can use the 3C engine to assign communications automatically in realtime or in the background, or you can use the mass change process to assign them in the background.

7. Review communications assigned to individuals, organizations, and events.

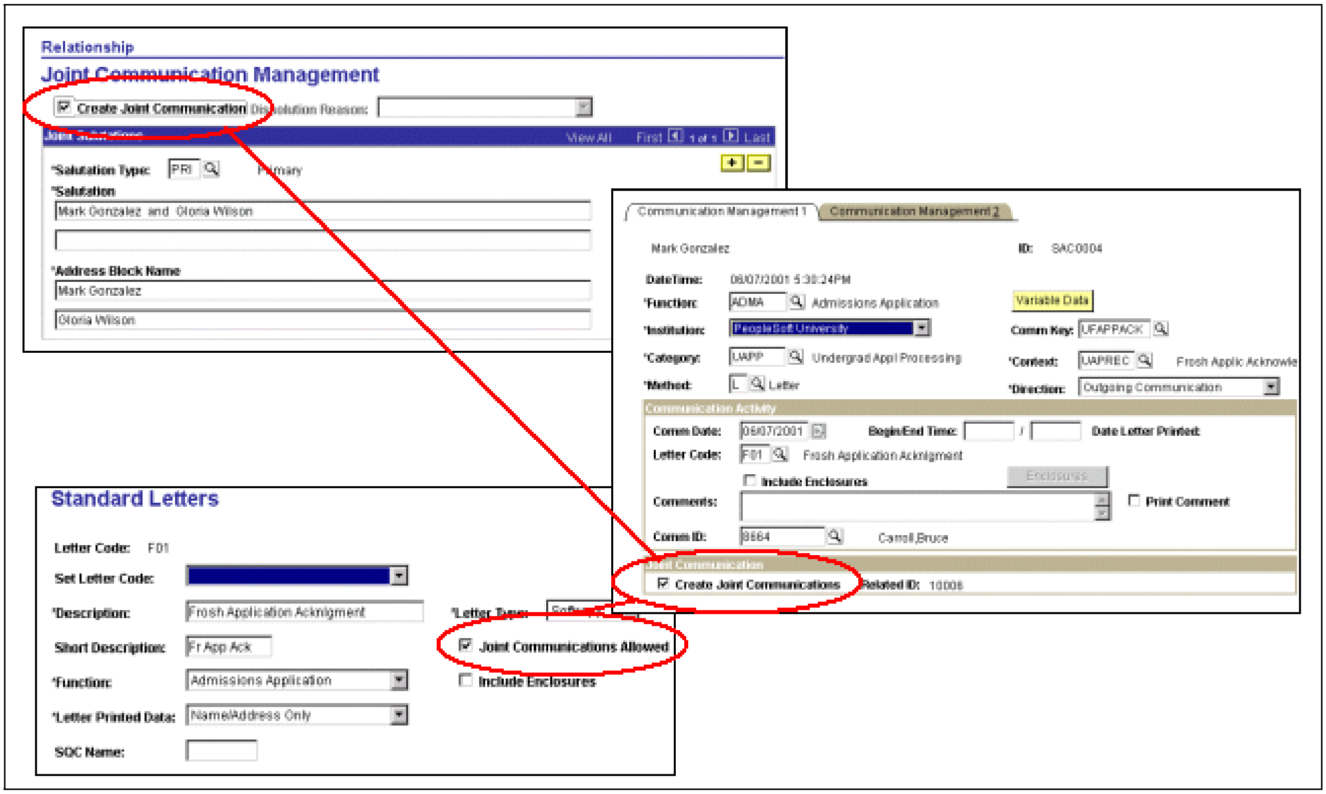
   You can review the details of each communication. You can view a list of all communications assigned them. You can also review the security access that users have for viewing or updating the communications.

8. Generate the communications.

Understanding Joint Communications

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions enables you to communicate jointly with individuals at a common address rather than producing separate communications for each individual. For example, you can invite a married couple or two roommates to an event by sending a single invitation to their joint address.

Functions on the relationships and communications pages enable you to create joint communications for two individuals when at least one of the individuals exists in your database.



Using the joint communication features on the relationships and communications pages in your system. Clockwise: the Joint Communication Management page (RELATION_SALU_SEC), the Communication Management 1 page (COMM_MGMT_1), and the Standard Letters page (SA_STNDR_LTR_TABLE)

Detailed information about each page where you select an option or enter data to manage joint communications is included in the appropriate places throughout the documentation. For your convenience, the following procedure provides a high-level view of the overall process and indicates where the relevant pages are documented.

To set up joint communications functionality:

1. Design how the two names will appear in the greeting and in the address portion of the letter by setting up the joint salutation on the Joint Salutation Type Table page as described in "Designing Campus Community, Establishing Salutations."

2. Set the Default Salutation Type on the Installation Defaults – CC page, as described in "Designing Campus Community, Reviewing Campus Community Installation Settings."

   If no default salutation type is defined, the letter generation data extract process fails.

3. Create joint usages on the Name Usage page, as described in "Designing Campus Community, Establishing Name Formats and Usage."

   Always include the default salutation type (from step 2) in usage orders for joint communications so the process does not fail due to the lack of a salutation.

To generate a joint communication:

1. Set the letter code on the Standard Letters page to Allow Joint Communication, as described in "Managing Communications, Setting Up Standard Letter Codes."
2. Create the relationship on the Relationship page for the individual in your database, as described in Maintaining Bio/Demographic Data, Entering Relationships Data."

   This includes clicking the Manage Joint Communication button to access the Joint Communication Management page, where you set the relationship to Create Joint Communication and define the joint salutation.
3. Identify the address to use for the joint communication and select the Joint Address check box on the Relationship Address page, as described in "Maintaining Bio /Demographic Data, Entering Relationships Data."
4. Assign the communication to the individual in your database (if both individuals are in your database, assign the communication to only one).

   You can use the 3C engine to detect the related records and automatically assign the joint communication, as described in "Understanding the 3Cs—Communications, Checklists, and Comments, Understanding the 3C Engine", or you can assign the communication manually on the Communication Management 1 and 2 pages described in "Assigning Communications to Individuals." This includes selecting the Create Joint Communication check box at the bottom of the Communication Management 1 page. The check box is available for selection based on steps 1 and 2— when the ID has a relationship set to allow joint communications, and the letter code is also set to allow joint communications.
5. Run the PeopleSoft letter generation data extract process, described in "Managing Communications, Generating Letters."

   The process creates an extract file containing the data to generate the joint communication, including the specified joint salutation and joint address.
6. Merge the extract file with the letter template to produce the joint communication and print the letter.

   You can use the sample CCLTRJNT Word template that is delivered with your system or another template created in Microsoft Word, to merge the data and print the letter.
7. (Optional) Use the pages described in "Reviewing Communications" to review communications and verify when they were sent, to whom they were sent, and if they were joint.

   You can review all communications in your system or review a summary of communications assigned to the primary individual or the related ID, if it exists. The joint communication is listed in the summary for both IDs even though the joint communication can be assigned to only one ID.

Understanding Letter Generation

You can extract data from your PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions system and use it to generate letters, labels, lists, envelopes, and so on. You can extract data from one ID, all IDs, all individuals, or all organizations in your database. You specify the type of data to extract and then run the extract process. The system places the extracted data into a comma delimited (.csv) file, which is a standard format readable by most word processing programs. Then, using your institution's word processing software, you can merge the data into any of the templates that you have for the letter codes defined on the Standard Letters page, including the sample Word templates delivered with your system, and print the outcome.

For information about using your institution's word processing software to merge data and print letters, consult the manufacturer's documentation.

Before you can extract letter data, a communication record for the desired letter must be assigned to the intended recipients. For joint communications, it is preferable that you assign the communication to only one of the individuals. If you assign it to both, the letter generation process will extract the data for both IDs and you will print two joint communications for the same two people. The record must include the appropriate administrative function, communication category, and communication context, and specify a method of *Letter* and the direction of *Outgoing.* You can assign communications to individuals or organizations manually or using the 3C engine or mass change.

When the communication records exist, the procedure for extracting data and generating a letter is as follows:

To generate a letter:

1. Specify the data to extract for the letter, including the ID, address usage, address name, salutation, and letter code.
2. Specify the date to print on the letter, the date to use as the letter completed date, and the communication date selection range.
3. Specify any checklist items to include in the letter.
4. Run the Letters Data Extract process to extract the specified data.
5. Use your word processing program to merge the extracted data into the letter template.
6. Save the softcopy template with merged data, or use it to print the letter.

Specifying the parameters for extracting data for the letter includes selecting the letter to use, identifying the individuals or organizations whose data you want to extract, and specifying the types of data to extract. Use the run control pages, described in the following sections, to specify extract data parameters.

After defining all of the parameters for extracting data, run the data extract process. Unless you specify a different file path, the process places the data files in the temporary directory for the server. You can specify a shared folder on your local machine or on any valid network drive path.

When the process finishes, files with the appropriate file names are placed at the specified extract file path destination. If you select the JetForm output, the file at the destination is CC<LETTERCODE>.dat, which is coded to work with JetForm. If you select the .CSV output, three files are created at the destination:

- CCLTR<LETTERCODE>.CSV for letters.
- CCLBL<LETTERCODE>.CSV for labels.
- CCLTRGEN.DAT file, which is coded to work with the Word templates delivered with your system.

For example, if you use the TRN letter code, and you select the .CSV output, the file for letters at the destination is CCLTRTRN.CSV.

Note. If you use a letter code for which you specified a unique SQC, you must place the SQC in the same directory as the CCLTRGEN.sqr and the CCLTRUNQ.sqc. You must also modify CCLTRNAM.SQC to look for the specific SQC.

You can review extracted data online for individuals and organizations on the Communication Letter Data pages.

When you run the letter generation data extract process, the data specified under Letter Printed Data for that letter code on the Standard Letter Table page, are listed on the Communication Letter Data page for individuals, or on the Organization Communication Letter Data page for organizations. You can use these pages to review and confirm the data extracted for an individual or organization. For example, using the Communication Letter Data page, you can confirm the address to which the letter for a specific individual will be addressed.

The letter generation data extract process automatically formats extracted addresses to meet U.S. postal regulations for domestic and international mail. The format is reflected in the address listed on the appropriate Letter Data page.

If you set a relationship to generate a copy of communications for a separate recipient on the Communication Recipient page in the Relationships component, you can view the data extracted for that separate recipient on the Communication Recipient Data page described in this section.

Overview of the Sample Templates

The letter generation data extract process creates a .dat file for merging data from your system into MicroSoft Word templates. PeopleSoft delivers sample Word templates. You can use the sample templates as delivered, modify them (unless otherwise indicated in the warning), or create your own Word templates. The following table lists the sample templates and their corresponding letter codes.

Warning! Do *not* modify the following PeopleSoft letter codes and Word templates: from HRMS, the letter codes and templates ACQ, ANO, CAN, CBR, CTR, DEP, DIV, IR, IS1, IS2, IS3, LAT, OF1, OF2, REV, and RSC; and from PeopleSoft Financial Aid, the letter code or template of FAN. Modifications to these values could require substantial programming effort. You can, however, modify any of the other delivered letter codes and templates to meet your institution's needs.

Letter Code	Description	Consult	Template Name
ACQ	Applicant-Consider Qualifications	HRMS	LTRACQ.DOC
ANO	Applicant-No Current Openings	HRMS	LTRANO.DOC
APP	Appointment Mailer		CCLTRAPP.DOC

Letter Code	Description	Consult	Template Name
AV1	Gift Acknowledgement		CCLTRAV1.DOC
AV2	Gift Receipt		CCLTRAV2.DOC
CAN	Training Cancellation Letter	HRMS	LTRCAN.DOC
DAF	Disciplinary Action Filing	HRMS	LTRDAF.DOC
DAR	Disciplinary Action Resolution	HRMS	LTRDAR.DOC
F01	Frosh Application Acknowledgment		CCLTRF01.DOC
F02	Frosh Missing Requirements		CCLTRF02.DOC
F03	Frosh Admit Regular		CCLTRF03.DOC
FAN	Financial Aid Notification	FA	FANLTR.DOC
GRF	Grievance Filing	HRMS	LTRGRF.DOC
GRR	Grievance Resolution	HRMS	LTRGRR.DOC
IN1	Initiative Appeal		CCLTRIN1.DOC
IR	Applicant Interview-Rejection	HRMS	LTRIR.DOC
IS1	Interview Schedule-Level 1	HRMS	LTRIS1.DOC
IS2	Interview Schedule-Level 2	HRMS	LTRIS2.DOC
IS3	Interview Schedule-Level 3	HRMS	LTRIS3.DOC

Letter Code	Description	Consult	Template Name
JNT	Summer party – Joint Invitation		CCLTRJNT.DOC
LAQ	Acknowledgement Letter	HRMS	LTRLAQ.DOC
MAD	Mid-Term Academic Deficiency		CCLTRMAD.DOC
MB1	Membership Card		CCLTRMB1.DOC
OF1	Job Offer to Applicant-Offer 1	HRMS	LTROF1.DOC
OF2	Offer Letter 2-Offer 2	HRMS	LTROF2.DOC
OFR	Early Offer Letter		CCLTROFR.DOC
OPR	web Operator Notification		CCLTROPR.DOC
P01	Inquiry Acknowledgment		CCLTRP01.DOC
REC	Admit Recipient Letter		CCLTRREC.DOC
RSC	Training Rescheduled Letter	No (HRMS)	LTRRSC.DOC

Assigning Communications to Individuals

This section discusses how to:

- Assign a communication to an individual.
- Review or update variable data for an individual.
- Add or delete enclosures.
- Determine the communication status.

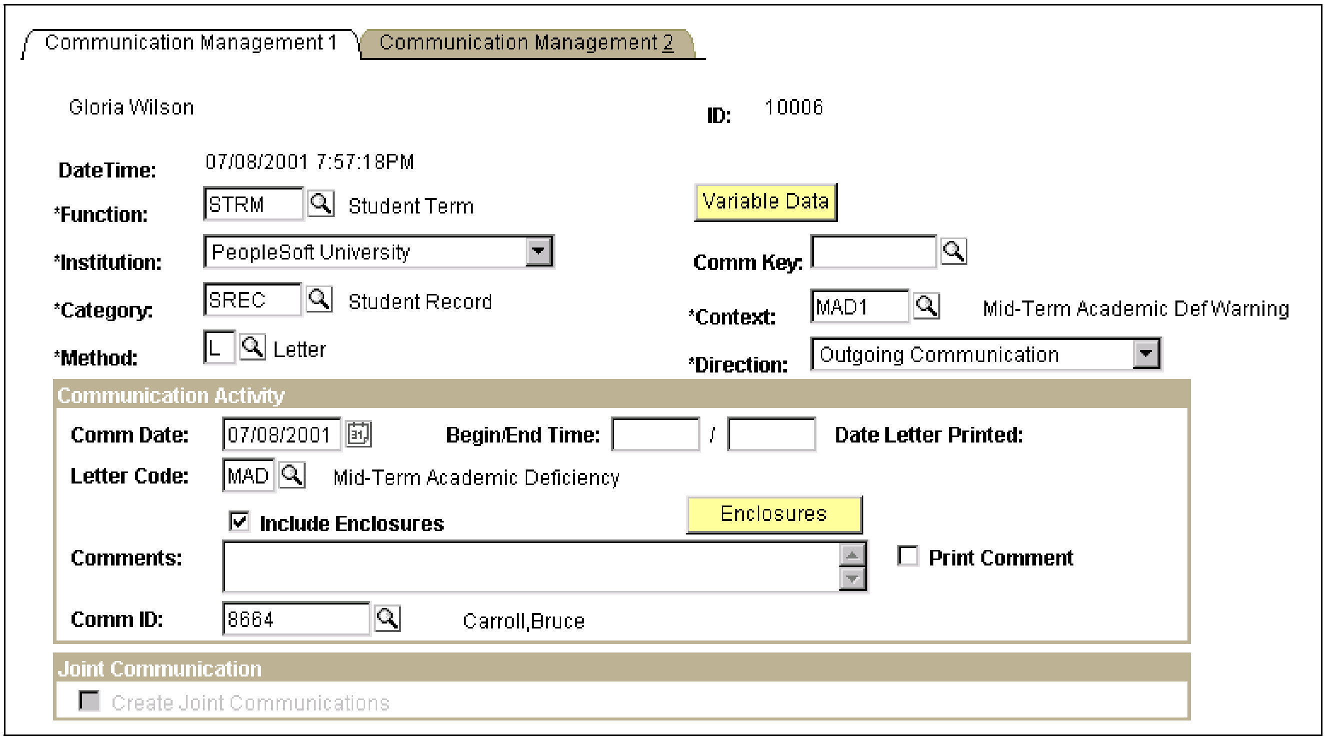
Pages Used to Assign Communications to Individuals

Page Name	Object Name	Navigation	Usage
Communication Management 1	COMM_MGMT1	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Use, Communication Management, Communication Management 1 • Build Community, Communications, Inquire, Communication Detail, Communication Detail 1 • Manage Contributor Relations, Manage People, Inquire, Communication Detail, Communication Detail 1 • Manage Contributor Relations, Manage People, Use, Communication Management, Communication Management 1 • Manage Student Financials, Collect Receivables, Use, Communication Management, Communication Management 1	Assign a communication to an individual.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Communication Management 1 page.	Review or edit variable data for an individual.

Page Name	Object Name	Navigation	Usage
Communication Management 2	COMM_MGMT2	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Use, Communication Management, Communication Management 2 • Build Community, Communications, Inquire, Communication Detail, Communication Detail 2 • Manage Contributor Relations, Manage People, Inquire, Communication Detail, Communication Detail 2 • Manage Contributor Relations, Manage People, Use, Communication Management, Communication Management 2 • Manage Student Financials, Collect Receivables, Use, Communication Management, Communication Management 2	Enter or review the status of the communication outcome.
Communication Enclosure	ENCL_TBL_SEC	Click the Enclosures button on the Communication Management 1 page.	Review, add, or delete enclosures when assigning a communication.

Assigning a Communication to the Individual

Access the Communication Management 1 Page.



Communication Management 1 page

Note. If you transferred to this page by clicking the Communication button on another page, the administrative function of the functional area of the first page, along with the academic institution and all the variable data associated with the administrative function, transfers to here. If you did not transfer to here from a functional area, you must enter the function, institution, and variable data.

Function

The code, from the Administrative Functions page, for the functional area that includes this communication.

Variable Data

Click to access the Variable Data page, where you can view or enter the required variable data associated with the specified function.

Institution

The institution responsible for this communication.

Comm Key

The name of the communication speed key that contains the communication category, communication context, method, direction, and letter code, for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually.

Category

The category, from the Communication Categories page, for this communication.

Context

The context, from the Communication Contexts page, for this communication.

Method The method, from the Communication Contexts page, for this communication. Only those methods associated with the specific context are available from the prompt list.

Direction The direction, from the Communication Contexts page, for this communication. Only those directions associated with the specific context are available from the prompt list.

Communication Activity

Communication Date The default communication date is the system's current date. You can override this date.

Begin Time The default begin time is the system time when the communication is entered and saved.

You can manually override the begin time.

End Time The system calculates and displays the end time based on the begin time and the duration.

You can manually override the end time.

Date Letter Printed The date when the communication, if a letter, was produced by running the letter generation data extract process. This field indicates that letter extract data was successfully completed for this communication.

Letter Code The code, from the Standard Letters page, for this communication. The letter codes available are those associated with the context and function selected for this communication.

Include Enclosures When selected, indicates that this communication includes enclosures.

If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects the Include Enclosures check box for you. You can then click the Enclosures button to review, add, or delete the set enclosures.

If the letter is not set up to include enclosures, you can manually select the check box to include enclosures now, and click the Enclosures button to add the desired enclosures.

Enclosures Available when the Include Enclosures option is selected. Click to access the Communication Enclosure page, where you can review, add or delete enclosures.

Comments Comments to further identify or describe the communication for this individual.

If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them.

Print Comment When selected, indicates that the comments should be printed on the communication.

Communication ID The ID of the staff person who communicated with or is initiating this communication with the individual.

Joint Communication

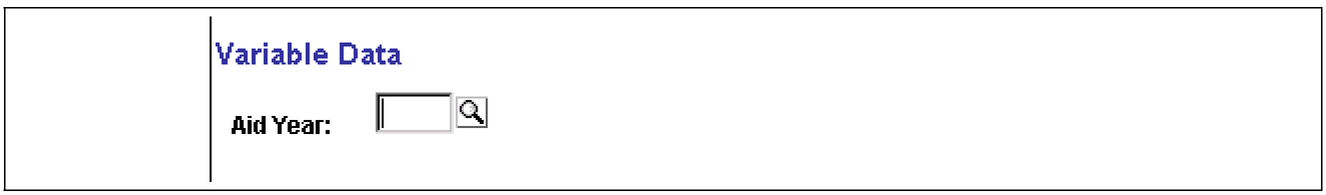
Create Joint Communications Available only if the individual to whom you are assigning the communication has a relationship set to allow joint communications on the Relationships page, and if the letter code is set to allow joint communications on the Standard Letters page.

Select to indicate that the communication should be addressed jointly to this individual and the related individual identified on the Relationships page.

See Chapter 26, “Managing Communications,” Understanding Joint Communications, page 272.

Reviewing or Updating Variable Data

Access the Variable Data page.



Variable Data page

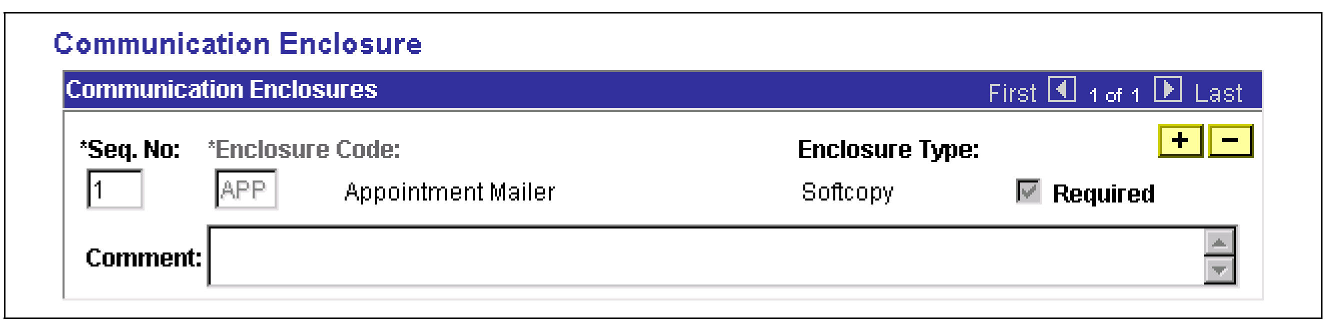
Different fields and data appear on this page based on the recipient and the administrative function selected.

See Also

Chapter 12, “Setting Up Administrative Functions,” page 105

Adding or Deleting Enclosures

Access the Communication Enclosure page.



Communication Enclosure page

Note. When an enclosure is set as required for a letter on the Standard Letters page, information for that enclosure is visible but not available here on the Communication Enclosure page. This prevents users from deleting an enclosure that your institution has decided is required.

Sequence Number

The number of this enclosure in the list of enclosures for this communication. When you run the letter generation data extract process, the process lists, in the order identified here, up to ten enclosures on the main letter.

The system automatically enters the next sequential number for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures. You can have a maximum of ten enclosures.

Enclosure Code

The code for the letter to be included as an enclosure for this communication.

The letter codes available are those associated with the same function that you select for the main letter code. For example, if you select the function *ADMA* for the main letter code, the Enclosure Code field prompt list displays the letter codes that exist and are associated with the function ADMA on the Standard Letters page.

Enclosure Type

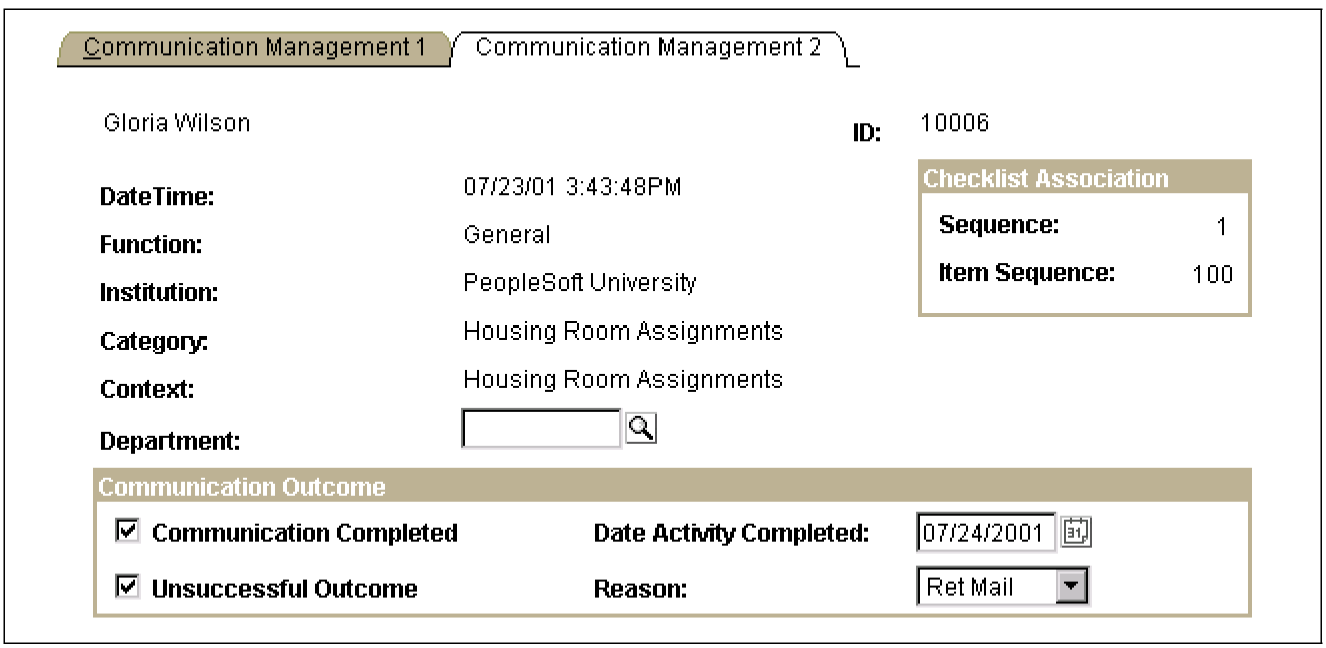
The system automatically displays the type of output *(Hardcopy* or *Softcopy)* associated with the selected enclosure letter code.

Required

When selected, indicates that the specific enclosure must accompany this communication at all times.

Determining the Communication Status

Access the Communication Management 2 page.



Communication Management 2 page

Department

(Optional) Select the department within your institution, from the Department Profile page, that is responsible for assigning this communication.

Checklist Association

This group box appears only when the communication is created as part of a checklist.

Sequence The checklist sequence, from the Checklists page.

Item Sequence The checklist item sequence number, from the Checklists page, that created this communication.

Communication Outcome

When you run the letter generation data extract process, the system automatically completes fields and selects check boxes in this group box to indicate the outcome of the communication. If you do not use the letter generation data extract process, you must complete these fields.

Communication Completed Indicates that the communication has been successfully completed. For example, the communication is complete if the phone call has been made or if the letter has been sent. In the case of the letter generation data extract process, the communication is complete if the data has been extracted according to the option selected on the run control page.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Date Activity Completed The default completion date is the date when the communication completed option is selected. You can manually override this date.

Note. When you update the status of a communication that is related to a checklist item, the system displays a message reminding you to also update the status of the checklist item.

Unsuccessful Outcome When selected, indicates that the communication was unsuccessful. For example, no one answered the phone, or the letter was returned undeliverable. In the case of the letter generation data extract process, an unsuccessful outcome means that the process was unable to successfully extract all the data for this communication.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Reason Available when the Unsuccessful Outcome check box is selected. Indicates the reason why the communication was unsuccessful. For example, if a letter that you sent was returned, you might select *Returned Mail* as the reason that the communication was unsuccessful. In the case of the letter generation data extract process, the system selects *Critical* to indicate that the absence of critical data prevented the extract process from completing for this communication.

Values for this field are delivered with your system as translate values. Except for the *Critical* value, which you should not modify, you can modify these translate values.

Assigning Communications to an Organization

This section discusses how to:

- Assign a communication to an organization.
- Review or update variable data for an organization.
- Add or delete enclosures.
- Enter or review the communication status.

Prerequisites

Before assigning communications to an organization, define the organization's data, including its location, department profile, and contact person.

See Also

Chapter 34, "Managing Organization Data," page 425

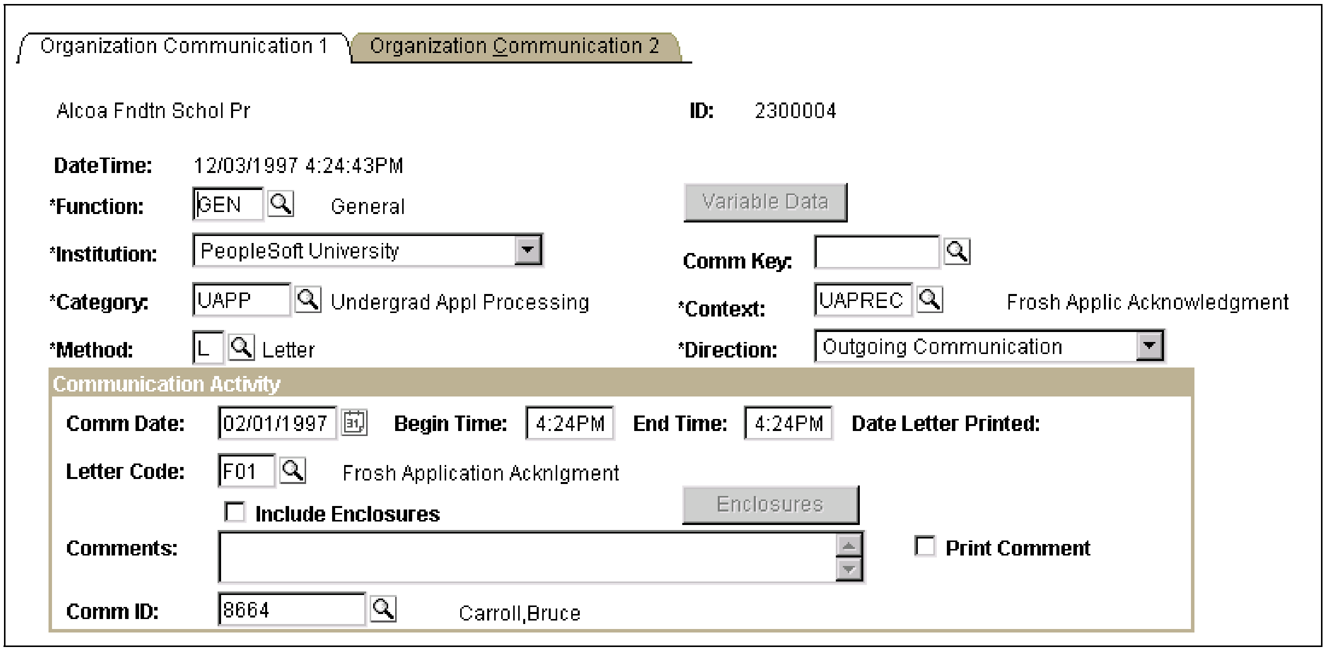
Pages Used to Assign a Communication to an Organization

Page Name	Object Name	Navigation	Usage
Organization Communication 1	ORG_COMM_MGMT1	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Use, Organization Communication, Organization Communication 1 • Build Community, Communications, Inquire, Org Communication Detail, Org Communication Detail 1 • Manage Contributor Relations, Manage Organizations, Use, Organization Communication, Organization Communication 1 • Manage Student Financials, Collect Receivables, Use, Organization Communication, Organization Communication 1	Create a communication for an organization.

Page Name	Object Name	Navigation	Usage
Organization Communication 2	ORG_COMM_MGMT2	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Use, Organization Communication, Organization Communication 2 • Build Community, Communications, Inquire, Org Communication Detail, Org Communication Detail 2 • Manage Contributor Relations, Manage Organizations, Use, Organization Communication, Organization Communication 2 • Manage Student Financials, Collect Receivables, Use, Organization Communication, Organization Communication 2	Enter additional data for a communication with an organization.

Assigning a Communication to the Organization

Access the Organization Communication 1 page.



Organization Communication 1 page

Note. If you transfer to this page by clicking the Communication button on another page, the administrative function associated with the functional area where you were, along with the institution and variable data associated with that functional area, transfers. If you did not transfer from a functional area, you must enter the function, institution, and variable data.

Function

The code, from the Administrative Functions page, for the functional area that includes this communication.

Variable Data

Click to access the Variable Data page where you can view or enter the required variable data associated with the specified function.

Institution

The institution responsible for this communication.

Comm Key

The name of the communication speed key that contains the communication category, communication context, method, direction, and letter code, for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually.

Category

The category, from the Communication Categories page, for this communication.

Context

The context, from the Communication Contexts page, for this communication.

Method

The method, from the Communication Contexts page, for this communication. Only those methods associated with the specific context are available from the prompt list.

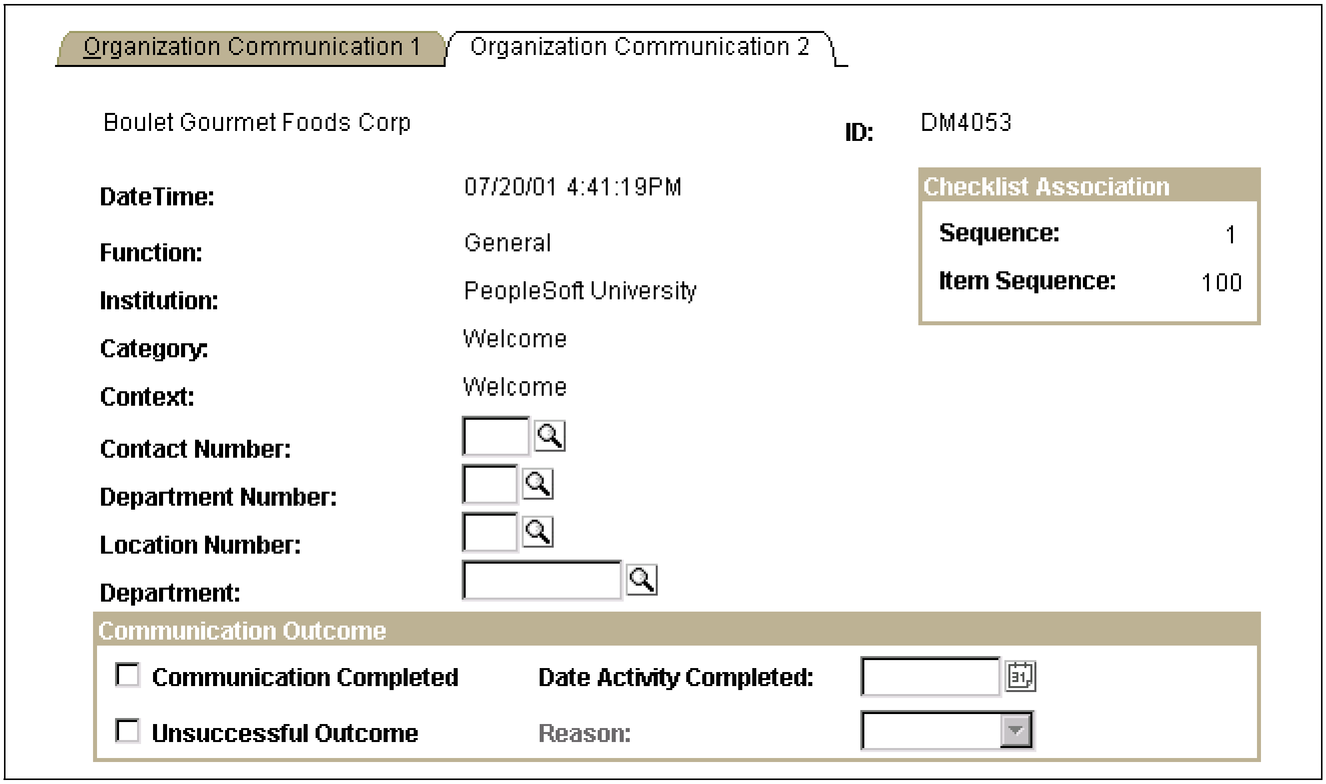
Direction	The direction, from the Communication Contexts page, for this communication. Only those directions associated with the specific context are available from the prompt list.

Communication Activity

Communication Date	The default communication date is the system's current date. You can override this date if necessary.
Begin Time	The default begin time is the system time when the communication is entered and saved. You can manually override the begin time as necessary.
End Time	The system calculates and displays the end time based on the begin time and the duration. You can manually override both end time as necessary.
Date Letter Printed	The date when the communication, if a letter, was produced by running the letter generation data extract process. This field indicates that letter extract data was successfully completed for this communication.
Letter Code	The code, from the Standard Letters page, for this communication. The letter codes available are those associated with the context and function selected for this communication.
Include Enclosures	When selected, indicates that this communication includes enclosures. If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects the Include Enclosures check box. You can then click the Enclosures button to review, add, or delete the set enclosures. If the letter is not set up to include enclosures, you can select the check box to include enclosures now, and click the Enclosures button to add the desired enclosures.
Enclosures	Available when the Include Enclosures check box is selected. Click this button to access the Communication Enclosure page, where you can review, add or delete enclosures.
Comments	Comments to further identify or describe the communication for this organization. If comments are associated with the communication speed key, they system automatically displays them here. You can change these comments or delete them.
Print Comment	When selected, indicates that the comments should be printed on the communication.
Communication ID	The ID of the staff person who communicated with or is initiating this communication with the organization.

Determining the Communication Status

Access the Organization Communication 2 page.



Organization Communication 2 page

Contact Number — The ID of the contact person, from the Organization Contacts page, to whom you are sending this communication.

Department Number — The number of the contact department, from the Organization Departments page, to which you are sending this communication.

Location Number — The number of the location, from the Organization Locations page, to which you are sending this communication.

Department — (Optional) Enter the department within your institution, from the Department Profile page, that is responsible for or assigning this communication.

Checklist Association

This group box appears only when the communication is created as part of a checklist.

Sequence — The checklist sequence, from the Checklists page.

Item Sequence — The checklist item sequence number, from the Checklists page, that created this communication.

Communication Outcome

When you run the letter generation data extract process the system completes fields and selects check boxes in this group box to indicate outcome of communication. If you do not use the letter generation data extract process, you must complete these fields.

Communication Completed When selected, indicates that the communication has been successfully completed. For example, the communication is complete if the phone call has been made or if the letter has been sent. In the case of the letter generation data extract process, the communication is complete if the data has successfully been extracted according to the option selected on the run control page.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Date Activity Completed The default completion date is the date when the communication completed option is selected. You can manually override this date.

Unsuccessful Outcome When selected, indicates that the communication was unsuccessful. For example, no one answered the phone, or the letter was returned undeliverable. In the case of the letter generation data extract process, an unsuccessful outcome means that the process was unable to successfully extract all the data for this communication.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Reason Available when the Unsuccessful Outcome check box is selected. Indicates the reason why the communication was unsuccessful. For example, if a letter that you sent was returned, you might select *Returned Mail* as the reason that the communication was unsuccessful. In the case of the letter generation data extract process, the system selects *Critical* to indicate that the absence of critical data prevented the extract process from completing for this communication.

Reason values are delivered with your system as translate values. Except for the *Critical* value, which you should not modify, you can modify these translate values.

Extracting Letter Data

This section discusses how to:

- Specify general parameters for extracting data.
- Specify parameters for merging the data.
- Specify parameters for extracting and updating any checklist data.
- Run the letter generation data extract process.
- Review and edit extracted data.

Prerequisites

Before identifying data to extract and merge into letters or other communications output, design your PeopleSoft Campus Community structure, including names and address usages. Before specifying checklist items data to extract, set up checklists and tracking groups.

See Also

Chapter 2, “Designing PeopleSoft Campus Community,” page 5

Chapter 15, “Setting Up Checklists,” page 129

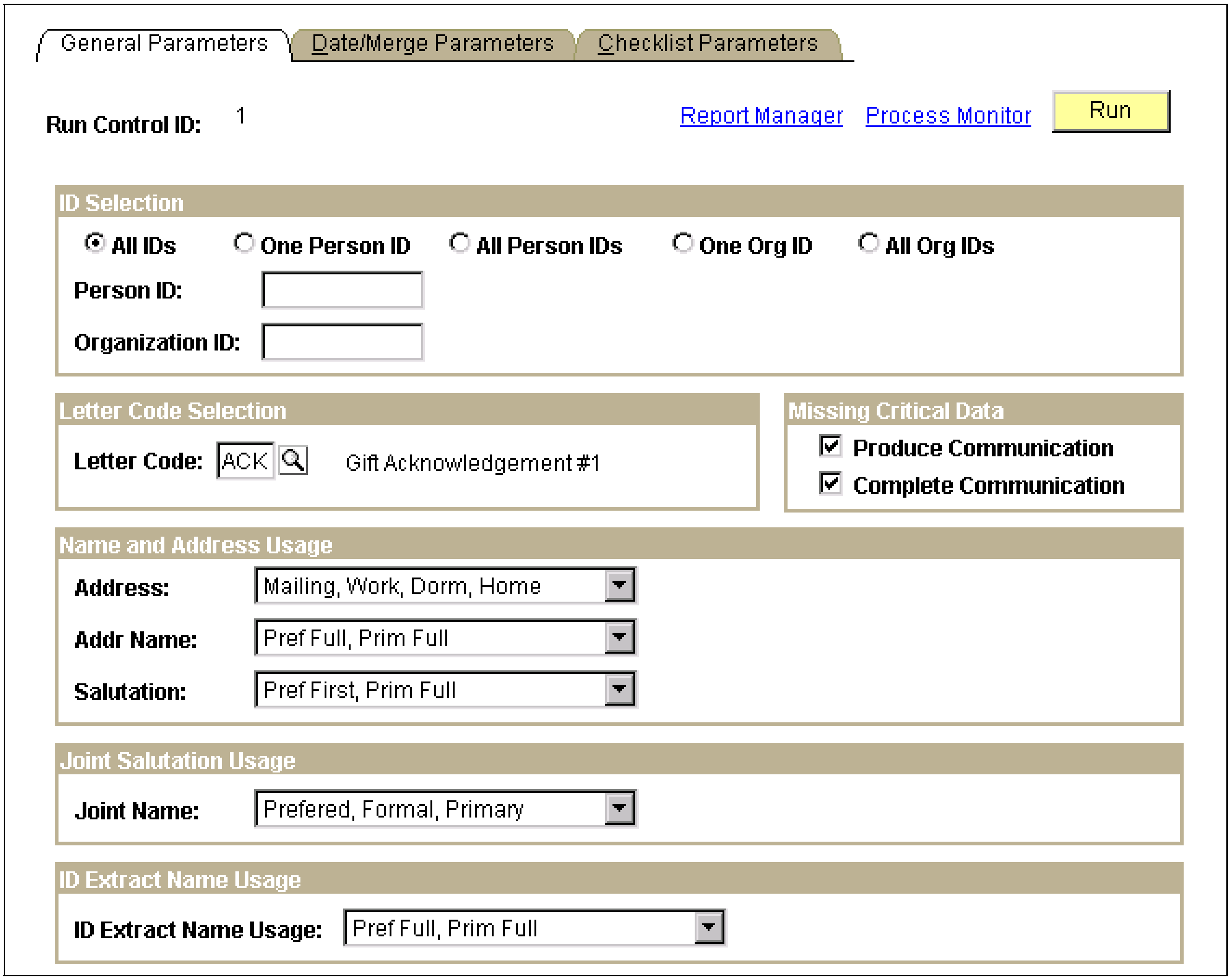
Pages Used to Extract Letter Data

Page Name	Object Name	Navigation	Usage
General Parameters	RUNCTL_LTRGEN1	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Process, Letter Generation, General Parameters • Manage Contributor Relations, Manage People, Process, Letter Generation, General Parameters • Manage Student Financials, Collect Receivables, Process, Letter Generation, General Parameters	Specify general parameters for extracting letter data, including the IDs for which data is to be extracted, the letter code into which the data should be merged, the name and address usages to use, and the joint salutation (if appropriate).
Date/Merge Parameters	RUNCTL_LTRGEN2	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Process, Letter Generation, Date/Merge Parameters • Manage Contributor Relations, Manage People, Process, Letter Generation, Date/Merge Parameters • Manage Student Financials, Collect Receivables, Process, Letter Generation, Date/Merge Parameters	Specify the necessary file locations, dates, and sort option for extracting data.

Page Name	Object Name	Navigation	Usage
Checklist Parameters	RUNCTL_LTRGEN3	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Process, Letter Generation, Checklist Parameters • Manage Contributor Relations, Manage People, Process, Letter Generation, Checklist Parameters • Manage Student Financials, Collect Receivables, Process, Letter Generation, Checklist Parameters	Specify any checklist items to extract and use in a letter.
Communication Letter Data	COMM_LTR_DATA	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Inquire, Communication Letter Data, Communication Letter Data • Manage Contributor Relations, Manage People, Inquire, Communication Letter Data, Communication Letter Data • Manage Student Financials, Collect Receivables, Inquire, Communication Letter Data, Communication Letter Data	View letter data extracted for an individual.
Organization Communication Letter Data	ORGCOMM_LTR_DATA	Build Community, Communications, Inquire, Org Communication Letter Data, Org Comm Letter Data	View letter data extracted for an organization.

Specifying General Parameters

Access the General Parameters page.



General Parameters page

ID Selection

All IDs

When selected, indicates that the process should extract the data from all IDs that are assigned a communication with the letter code indicated and that are not marked complete.

One ID

When selected, indicates that the process should extract the data from the one individual ID indicated. The communication with the indicated letter code must be assigned to this individual.

If you select the One ID option, specify the individual's ID in the Person ID field.

All Person IDs

When selected, indicates that the process should extract the data from all the individuals' IDs that are assigned a communication with the letter code indicated.

One Organization ID When selected, indicates that the process should extract the data from the one organization ID indicated. The communication with the indicated letter code must be assigned to this organization.

If you select the One Org ID option, specify the organization's ID in the Organization ID field.

All Org IDs When selected, indicates that the process should extract the data from all the organization IDs that are assigned a communication with the letter code indicated and that are not marked complete.

Letter Code Selection

Letter Code The letter code that identifies the template into which to merge this extract data.

Only those letter codes to which you have 3C group security access are available from the list.

Missing Critical Data

Produce Communication When selected, indicates that the process should produce the extract file, even if critical data is missing.

Complete Communication When selected, indicates that the process should set the status to *Complete* on the Communication Management 2 page, even if critical data is missing.

Name and Address Usage

Name and address usages apply to letters addressed to individuals. They do not apply to letters for organizations.

Address The type of address, from the Address Usage page, to extract for this letter.

You can list address types in a preferred search-and-use order. For example, if you list *Mailing, Billing, Home,* the system searches for the mailing address first; if none exists, then the billing address; if none exists, the home address last.

Address Name The type of name, from the Name Usage page, to extract for the address section of this letter.

As with addresses, you can list address name types in a preferred search-and-use order.

Salutation The type of name, from the Name Usage Table page, that the system should extract for use in the opening or salutation of this letter.

For example, you might want to use the individual's primary full name in the address section of the letter, but use his preferred first name in the salutation (Dear Dave).

As with addresses, you can list salutation name types in a preferred search-and-use order.

Joint Salutation Usage

Joint Name

The Joint Name field is available when the selected letter code is set on the Standard Letters page to allow joint communications. The joint names available in the list are those with the Joint Usage check box selected on the Name Usage page.

The process extracts this salutation name usage for IDs set up for joint communications.

ID Extract Name Usage

ID Extract Name Usage

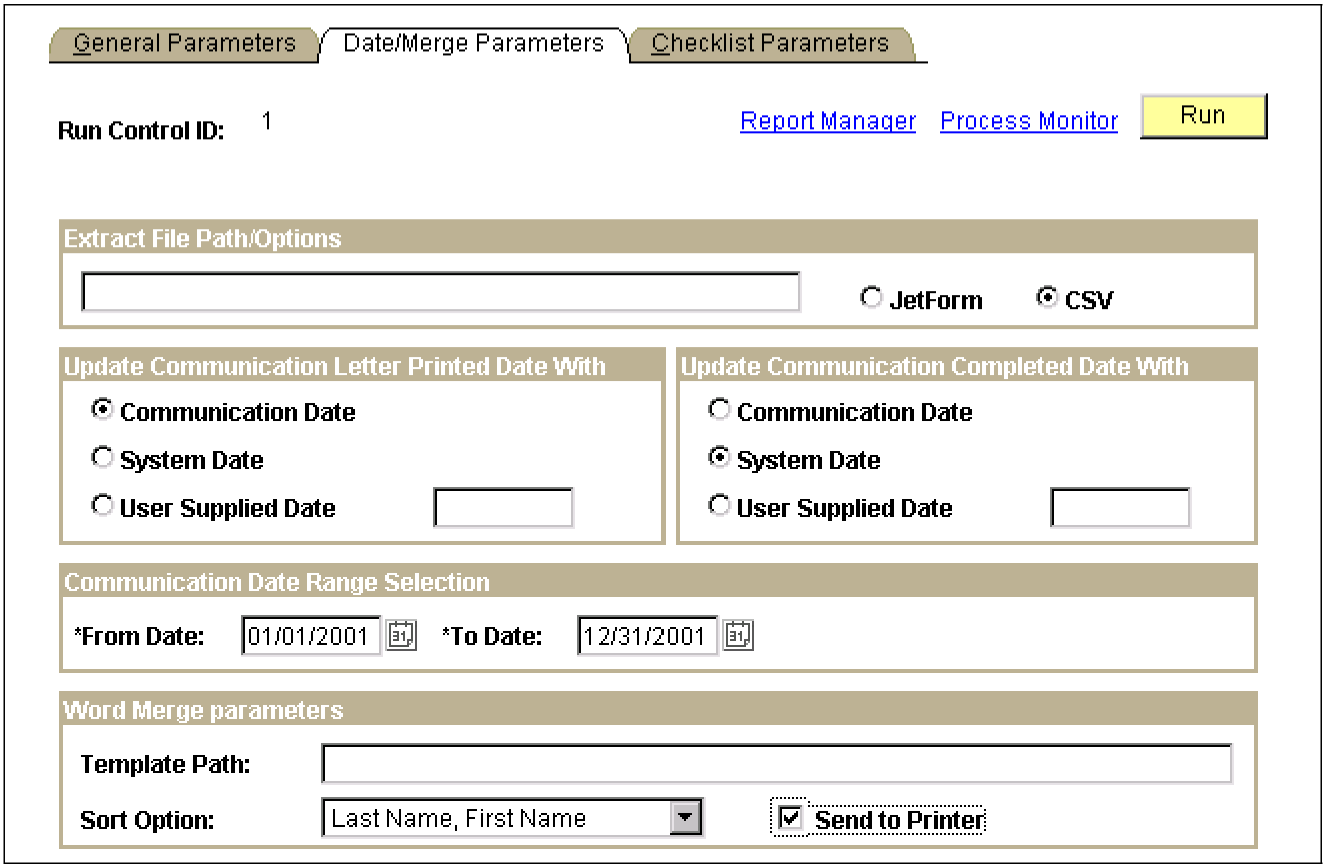
The type of name that the system should extract for any occurrence marked *ID* in the text of the letter template.

For example, you might want to use the individual's primary full name in the address section of the letter (Mr. Juan M. Dominguez), his preferred first name in the salutation (Dear Juan), and his last name in the text to say "We are sure the Dominguez family will enjoy participating in this event."

As with addresses, you can list ID name types in a preferred search-and-use order.

Specifying Date/Merge Parameters

Access the Date/Merge Parameters page.



Date/Merge Parameters page

Extract File Path/Options

The server temporary directory is the default location for the .cvs and .dat extract files. If you want the system to place the files elsewhere, specify the correct path here.

The path must be a valid network path, containing the path delimiter (forward slash or back slash), and be in the appropriate letter case (upper or lower) for your platform. For example, on Windows NT where the target machine is Machine01 and the target folder is LtrData, the valid path would be \\Machine01\temp\LtrData.

JetForm When selected, indicates that the process should create an extract file (.dat) compatible with JetForm.

CSV When selected, indicates that the process should create a comma delimited (.csv) extract file compatible with most word processing programs.

The process also creates a .dat file specifically for Microsoft Word and the Word templates delivered with your system.

Update Communication Letter Printed Date With

Select the date to appear on the letter.

Communication Date When selected, indicates that the system should use the communication date as the letter printed date on Communication Management 1 page.

System Date When selected, indicates that the system should extract the current system date for the date of the letter.

User Supplied Date When selected, indicates that the system should use the specified date as the date of the letter. You must supply the desired date.

Update Communication Completed Date With

Select the date for the system to use as the communication completed date on the communication record (Communication Management 2 page).

Communication Date When selected, indicates that the system should use the date when the communication was assigned as the communication completed date on the Communication Management 2 page.

System Date When selected, indicates that the system should use the current system date as the communication completed date on the Communication Management 2 page.

User Supplied Date When selected, indicates that the system should use the specified date as the communication completed date on the Communication Management 2 page. You must supply the desired date.

Communication Date Range Selection

Enter the date range of the communication records from which to extract data. For example, you might want to extract data only from those IDs to which you assigned a specific letter between January 1 and March 1 of the current year.

Use the date range to schedule and manage your letter communications. For example, you might schedule daily or weekly runs of the letter generation data extract process for prospect inquiry letters, or missing information letters for your applicants.

From Date The beginning date of the inclusive date range selection.

To Date The ending date of the inclusive date range selection.

Word Merge Parameters

If you are using the sample Word templates delivered with your system or if you are using other templates created in Microsoft Word, specify parameters here. A macro (CCLTRGEN.DOT) built into the delivered Word template process uses these parameters when performing a letter merge.

If you are not using Microsoft Word, you can skip these fields.

Note. Setting these parameters on the Letter Generation run control page affects the data included in the CCLTRGEN.DAT file, but does not invoke the Word merge process. To perform a letter merge, you must launch Word and perform the merge process.

Template Path The file path to the template into which the process should merge the data.

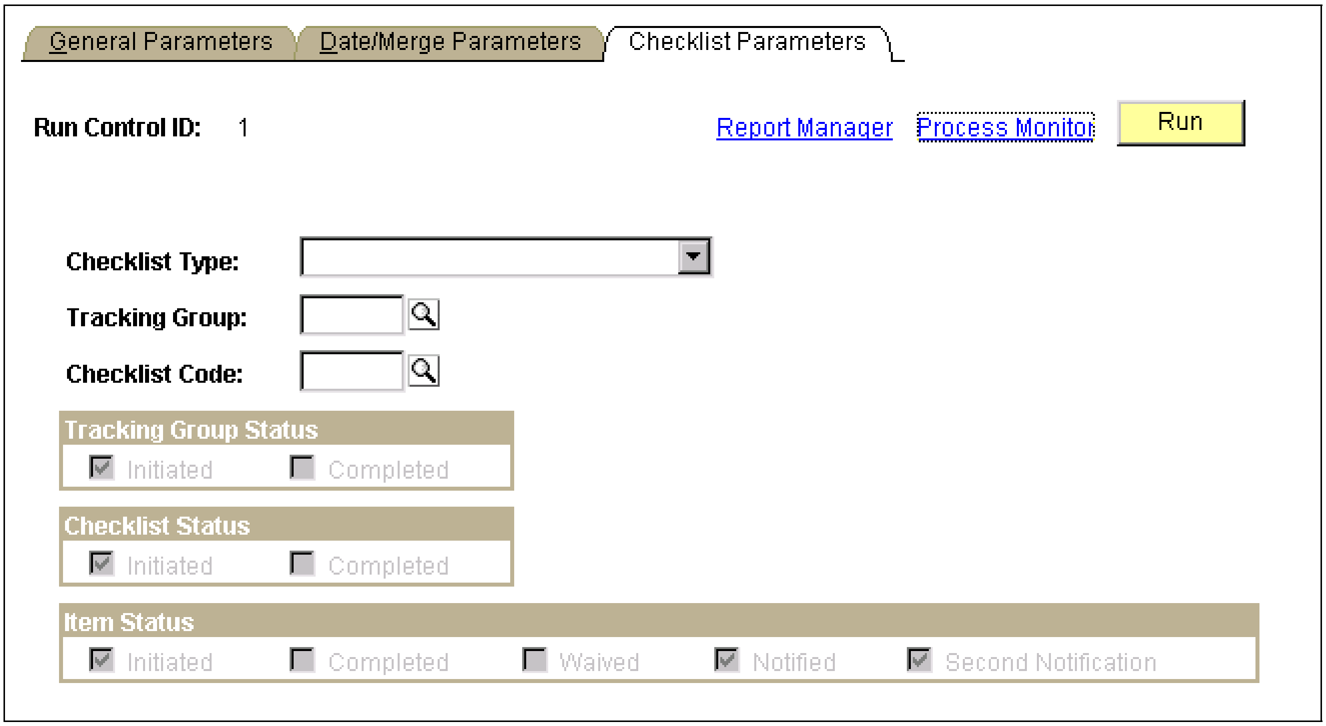
Sort Option The order in which the process should sort the merged letters.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Send to Printer When selected, indicates that the Word letter merge process should automatically send the letter with merged data to the printer.

Specifying Checklist Parameters

Access the Checklist Parameters page.



Checklist Parameters page

Checklist Type The type of checklist from which the process should extract data for this letter.

Tracking Group The tracking group whose checklist data the process should extract for this letter.

Checklist Code The specific checklist code whose checklist item data the process should extract for this letter.

Tracking Group Status

If you specified a tracking group, you must also select a tracking group status. You can select more than one status option.

Initiated When selected, indicates that the process should extract tracking group data with the status of *Initiated* for this letter.

Completed When selected, indicates that the process should extract tracking group data with the status of *Completed* for this letter.

Checklist Status

Initiated When selected, indicates that the process should extract data from checklists with the status of *Initiated* for this letter.

Completed When selected, indicates that the process should extract data from checklists with the status of *Completed* for this letter.

Item Status

If you specified a checklist code, you must select a checklist item status. You can select more than one status option.

Initiated When selected, indicates that the process should extract data from checklist items with the status of *Initiated* for this letter.

Completed When selected, indicates that the process should extract data from checklist items with the status of *Completed* for this letter.

Waived When selected, indicates that the process should extract data from checklist items with the status of *Waived* for this letter.

Notified When selected, indicates that the process should extract data from checklist items with the status of *Notified* for this letter.

Second Notification When selected, indicates that the process should extract data from checklist items with the status of *Second Notification* for this letter.

Running the Data Extract Process

After you specify the extract parameters, you can run the CCLTRGEN data extract process by clicking the Run button from the General Parameters page, the Date/Merge Parameters page, or the Checklist Parameters page.

Note. Setting parameters on these run control pages affects the data included in the CCLTRGEN.DAT file, however it does not invoke the merge process. To perform a merge, you must launch the merge process provided from within your institution’s word processing software. If you want to merge the extract data into any of the sample templates (or other Word templates), you must launch Word and perform Word’s Mail Merge process.

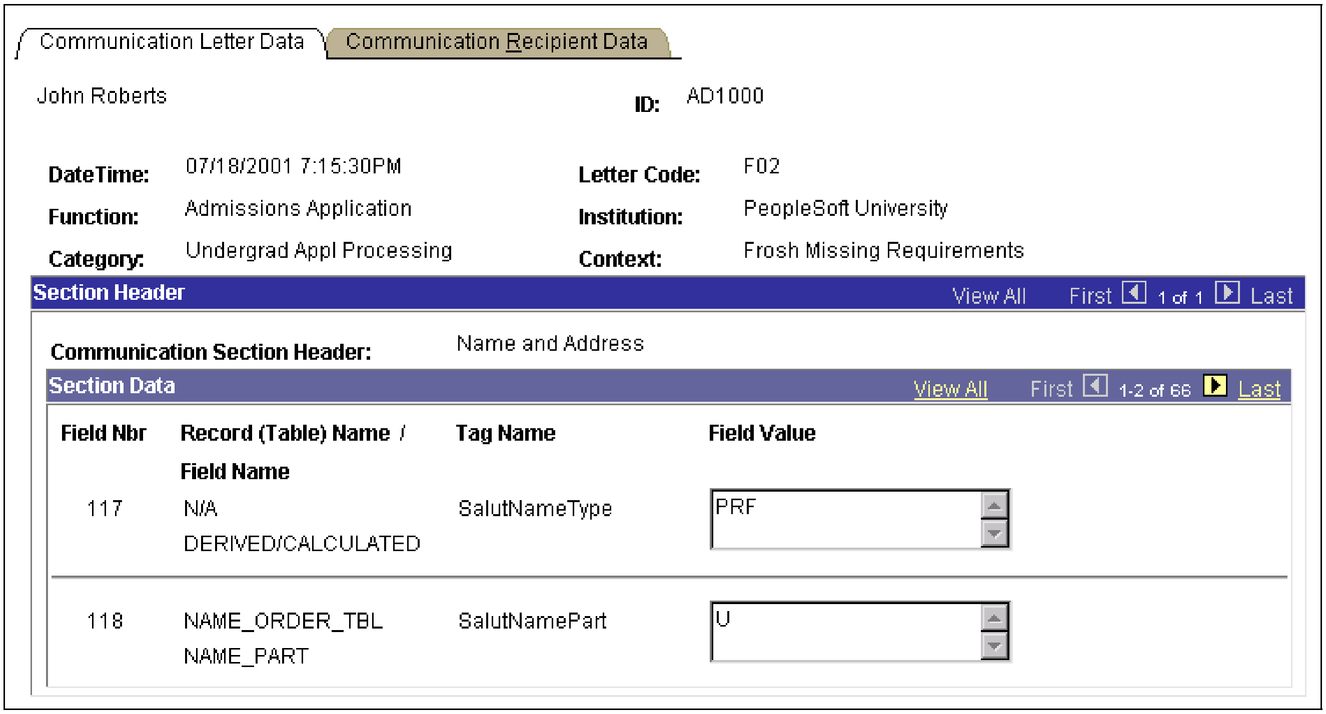
Note. The default output for CCLTRGEN is .csv. This is defined within the CCLTRGEN program. Selecting Type and Format field values on the Process Scheduler Request page will not change this output.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Using PeopleSoft Process Scheduler”

Reviewing Extract Data Online for Individuals

Access the Communication Letter Data page.

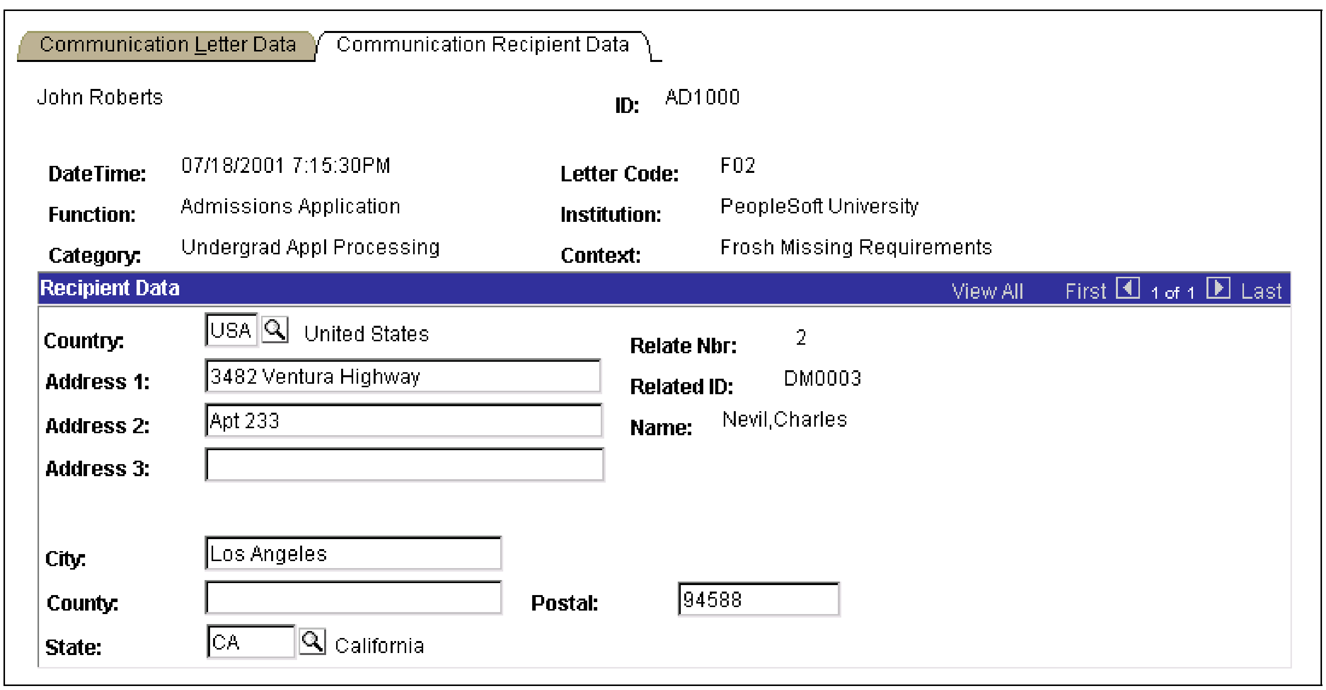


Communication Letter Data page

The Communication Letter Data page is for viewing purposes only. You cannot enter or modify data here. Information on this page is controlled from the Letter Printed Data value set on the Standard Letter Table page.

Reviewing Extract Data for an Additional Recipient

Access the Communication Recipient Data page.

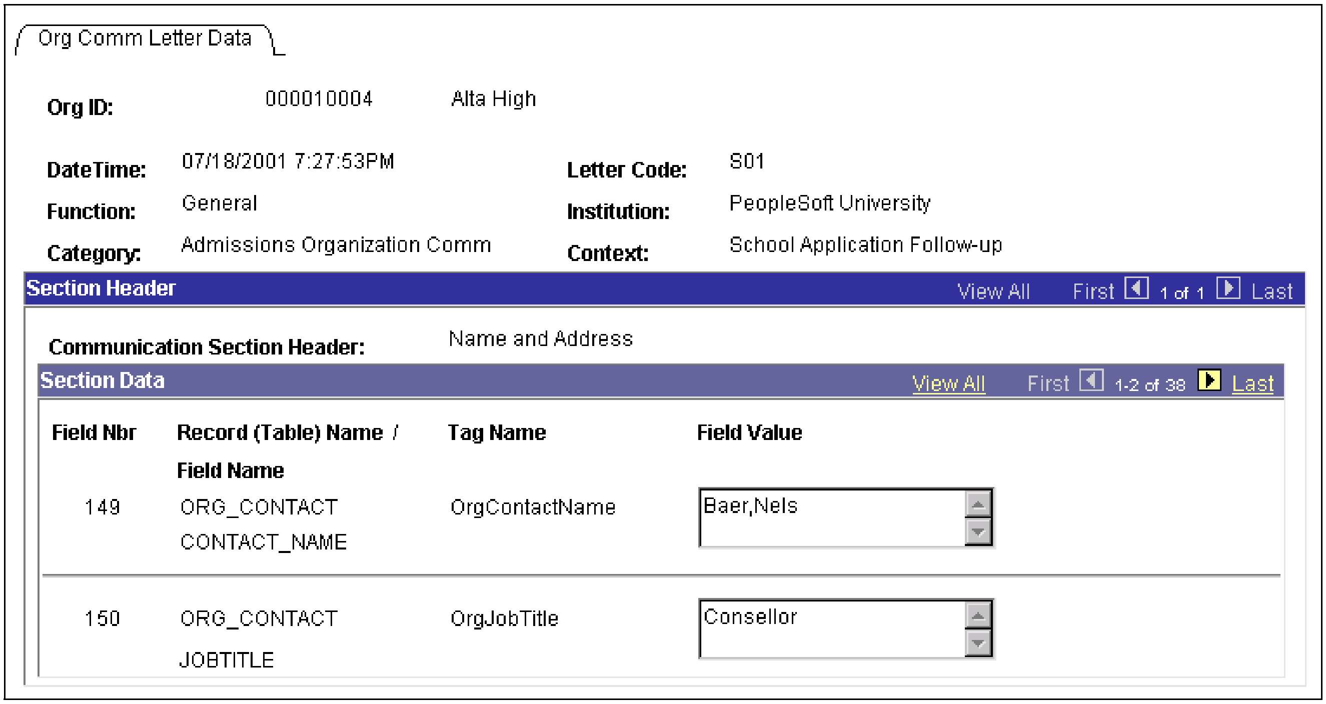


Communication Recipient Data page

The Communication Recipient Data page is for viewing purposes only. You cannot enter or modify data here. Information appears on this page only if you have set up a separate recipient on Communication Recipient page in the Relationships component for the specified letter code.

Reviewing Extract Data for an Organization

Access the Org Comm Letter Data page.



Organization Communication Letter Data page

The Organization Letter Data page is for viewing purposes only. You cannot enter or modify data here. Information on this page is controlled from the Letter Printed Data value set on the Standard Letter Table page.

Reviewing Communications With an Individual

This section provides an overview of how to:

- Review a summary of communications with an individual.
- Review extract data for a communication with an individual.
- Review details of a communication with an individual.

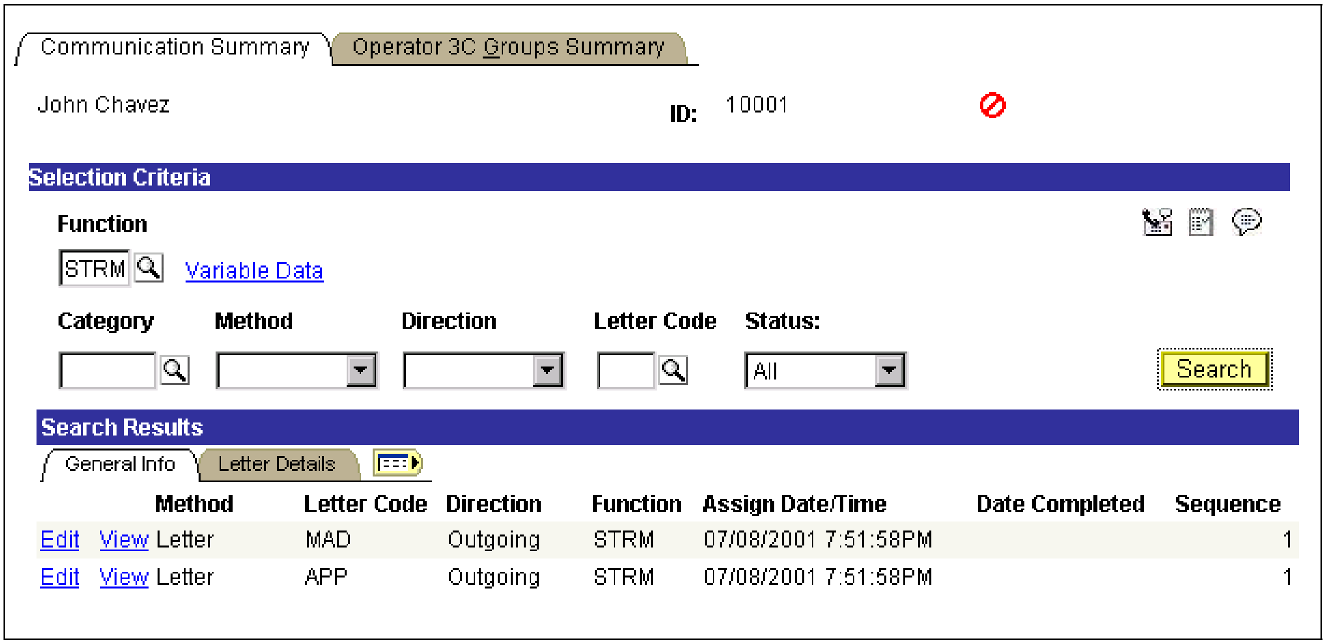
Pages Used to Review Communications With Individuals

Page Name	Object Name	Navigation	Usage
Communication Summary	COMM_SUMMARY	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Inquire, Communication Summary, Communication Summary • Manage Contributor Relations, Manage People, Inquire, Communication Summary, Communication Summary • Administer Financial Aid, Apply for Financial Aid, Inquire, Communication Summary, Communication Summary • Manage Student Financials, Collect Receivables, Inquire, Communication Summary, Communication Summary • Develop Enrollment, Process Applications, Inquire, Communication Summary, Communication Summary • Manage Student Records, Track Student Careers, Inquire, Communication Summary, Communication Summary	Search for and review a summary of communications to or from an individual.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	Build Community, Communications, Inquire, Communication Summary, Operator 3C Groups Summary	View an individual's 3C group inquiry or update access, and change the inquiry access if necessary.

Page Name	Object Name	Navigation	Usage
Communication Letter Data	COMM_LTR_DATA	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Inquire, Communication Letter Data, Communication Letter Data • Manage Contributor Relations, Manage People, Inquire, Communication Letter Data, Communication Letter Data • Manage Student Financials, Collect Receivables, Inquire, Communication Letter Data, Communication Letter Data	Review extract data for a communication with an individual.
Communication Detail 1	COMM_MGMT1	Build Community, Communications, Inquire, Communication Detail	View details of a communication assigned to an individual.
Communication Detail 2	COMM_MGMT2	Build Community, Communications, Inquire, Communication Detail, Communication Detail 2	View details of a communication assigned to an individual.

Reviewing a Summary of Communications With an Individual

Access the Communication Summary page.



Communication Summary page: General Info tab

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.

Common Page Information: Selection Criteria Region

If you click the Search button without entering any values, the system searches for all checklists for the individual and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function	The administrative area on which to search.
Variable Data	Click to access the Variable Data page where you can view the variable data associated with this administrative function for this individual.
Category	The category, from the Communication Categories page, for which to search.
Context	The context, from the Communication Contexts page, for which to search.
Method	The method, from the Communication Contexts page, which to search.
Direction	The direction, from the Communication Contexts page, for which to search.
Status	The status of the communications for which to search.
	All: The system searches for all communications regardless of status.
	Complete: The system searches for only completed communications.
	Incomplete: The system searches for only incomplete communications.
Search	Click to launch the search based on the criteria you selected

Letter Details Tab

Use the Letter Details tab to determine supplemental information about the communication—if there were enclosures, the enclosure letter codes and descriptions; if the communication was joint, the related ID; and the category and context for the communication.

Note. A joint communication can be assigned to only one of the two IDs. However, when a joint communication is assigned, the communication is listed in the summary for both IDs. For example, if you assign a joint communication to primary ID 12345 with the related ID 13578, and view the summary for ID 12345, the joint communication check box is selected and no related ID value appears. When you view the summary for (related) ID 13578, the joint communication check box is selected and the related ID of 12345 appears.

Reviewing Extract Data for an Individual Communication

Use the Communication Letter Data page to review the data extracted for an individual as the result of the letter generation data extract process.

See Also

Chapter 26, "Managing Communications," Reviewing Extract Data Online for Individuals, page 300

Reviewing Details of a Communication With an Individual

You can review the details of a communication with an individual on the Communication Detail 1 and 2 pages. These pages are view-only versions of the Communication Management 1 and 2 pages where you assign communications to the individual. You cannot enter or edit data on the detail pages.

See Also

Chapter 26, "Managing Communications," Assigning Communications to Individuals, page 277

Reviewing Communications With an Organization

This section provides an overview of how to:

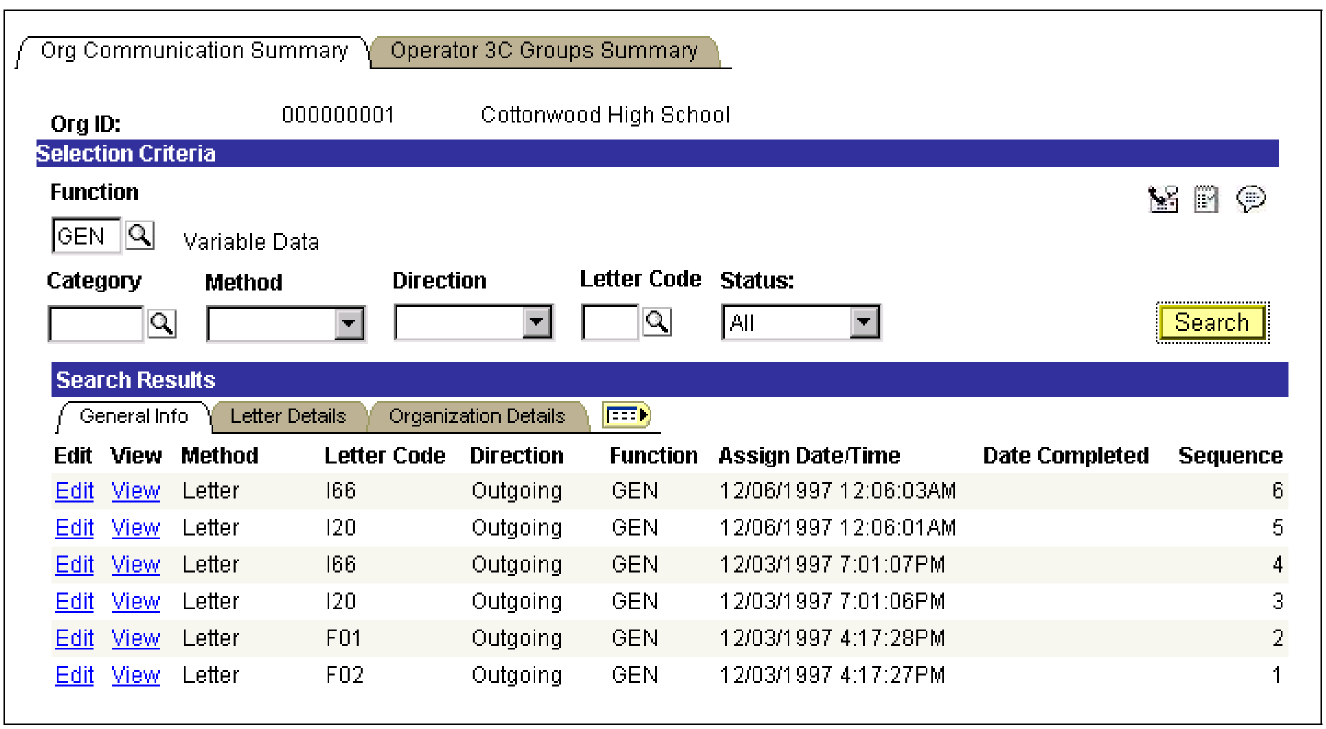
- Review a summary of communications with an organization.
- Review extract data for a communication with an organization.
- Review details of a communication with an organization.

Page Used to Review Communications with Organizations

Page Name	Object Name	Navigation	Usage
Organization Communication Summary	ORG_COMM_SUMMARY	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Communications, Inquire, Org Communication Summary, Org Communication Summary • Manage Contributor Relations, Manage Organizations, Inquire, Org Communication Summary, Org Communication Summary • Manage Student Financials, Collect Receivables, Inquire, Org Communication Summary, Org Communication Summary	Review communications with an organization.

Reviewing a Summary of Communications with an Organization

Access the Org Communication Summary page.



Organization Communication Summary page: General Info tab

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.

Common Page Information: Selection Criteria Region

If you click the Search button without entering any values, the system searches for all checklists for the individual and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

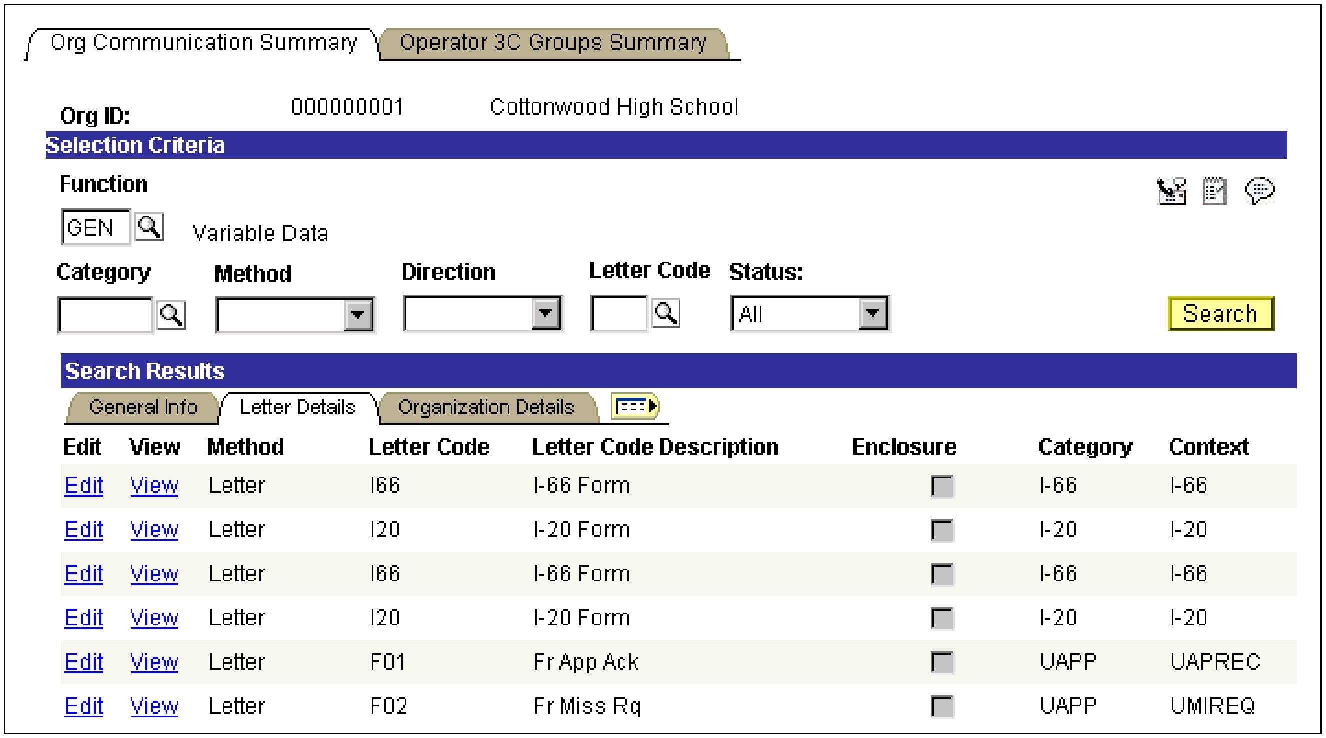
Function	The administrative area on which to search.
Variable Data	Click to access the Variable Data page where you can view the variable data associated with this administrative function for this organization.
Category	The category, from the Communication Categories page, for which to search.
Context	The context, from the Communication Contexts page, for which to search.
Method	The method, from the Communication Contexts page, which to search.
Direction	The direction, from the Communication Contexts page, for which to search.
Status	The status of the communications for which you want to search. *All:* The system searches for all communications regardless of status. *Complete:* The system searches for only completed communications. *Incomplete:* The system searches for only incomplete communications.
Search	Click to launch the search based on the criteria you selected.

General Info Tab

Use the General Information tab to determine information about each primary communication—the method, letter code, direction, function, assign date/time, and date completed.

Letter Details Tab

Use the Letter Details tab to determine supplemental information about the communication—if there were enclosures and the enclosure letter codes and descriptions; and the category and context for the communication.

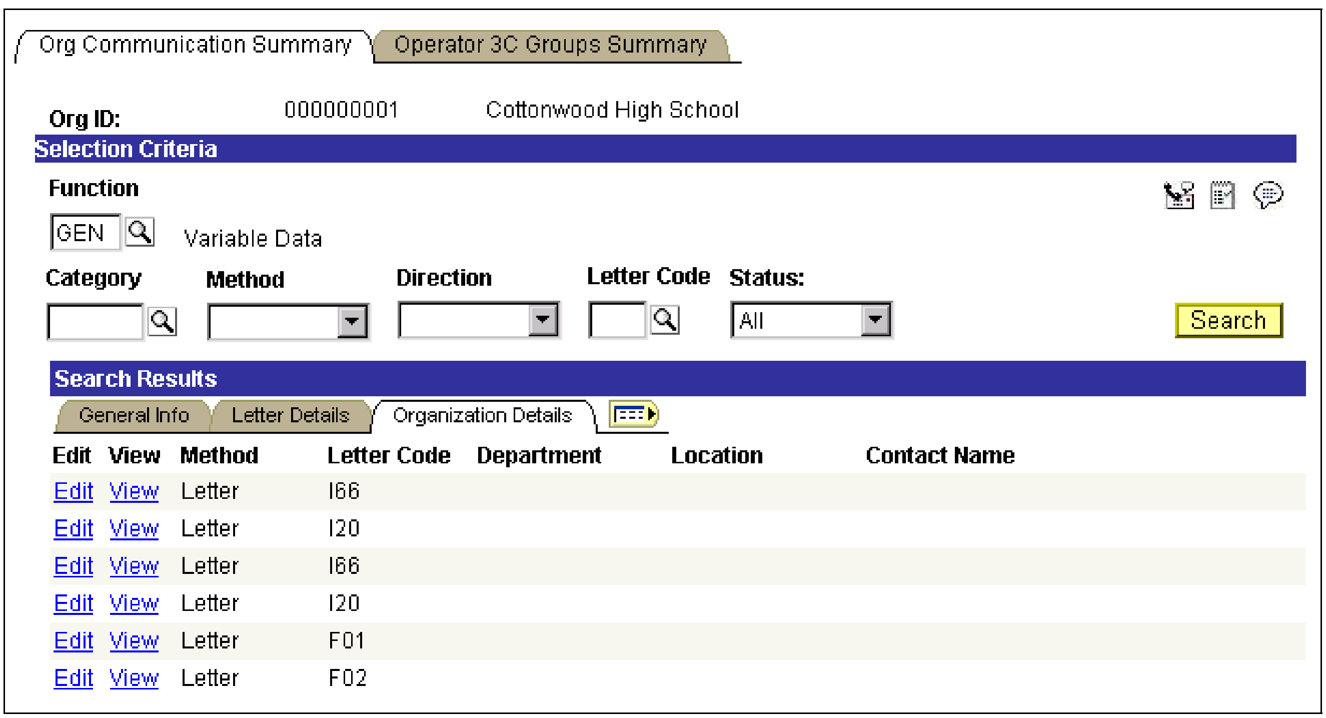


Edit	View	Method	Letter Code	Letter Code Description	Enclosure	Category	Context
Edit	View	Letter	I66	I-66 Form		I-66	I-66
Edit	View	Letter	I20	I-20 Form		I-20	I-20
Edit	View	Letter	I66	I-66 Form		I-66	I-66
Edit	View	Letter	I20	I-20 Form		I-20	I-20
Edit	View	Letter	F01	Fr App Ack		UAPP	UAPREC
Edit	View	Letter	F02	Fr Miss Rq		UAPP	UMIREQ

Communication Summary page: Letter Details tab

Organization Details Tab

Use the Organization Details tab to determine the recipient organization's department, location, and contact name.



Edit	View	Method	Letter Code	Department	Location	Contact Name
Edit	View	Letter	I66			
Edit	View	Letter	I20			
Edit	View	Letter	I66			
Edit	View	Letter	I20			
Edit	View	Letter	F01			
Edit	View	Letter	F02			

Organization Communication Summary: Organization Details tab

Reviewing Extract Data for an Organization Communication

Use the Organization Communication Letter Data page to review the data extracted for an organization as the result of the letter generation data extract process.

Reviewing Details of an Organization Communication

You can review the details of a communication with an individual on the Communication Detail 1 and 2 pages. These pages are view-only versions of the Communication Management 1 and 2 pages where you assign communications to the individual. You cannot enter or edit data on the detail pages.

See Also

Chapter 26, "Managing Communications," Assigning Communications to an Organization, page 285

Chapter 27

Managing Comments

This chapter provides an overview of comments and discusses how to:

- Enter comments.
- Review comments.

Understanding Comments

You can enter and track comments about individuals and organizations. You can review all comments about an individual or organization or all comments entered by a specific individual. Because personal comments are subjective and often confidential, carefully analyze your institution's needs and requirements for entering and tracking comments. You should also be familiar with administrative functions and 3C group security before setting up or creating comments in your system.

(comments)	With the appropriate security access, you can click the Create Comments button while on a page in a functional area about that individual or organization to attach or review comments to an individual's or an organization's record.

You can also navigate through the menus to access the comments pages described in this chapter.

Prerequisites

Set up comments, including comment categories and 3C comment groups, before entering comments for individuals or organizations.

See Also

Chapter 14, "Setting Up Comments," page 125

Entering Comments

This section discusses how to:

- Enter comments about an individual.

- Enter comments about an organization.
- Review or change variable data.

Common Elements Used in This Section

Administrative Function
The code for the administrative area with which this comment is associated.

3C Group
The group of comment types to which a user has security access.

Variable Data
Click to access the Variable Data page where you can view or enter the variable data (for the individual or organization) that is associated with the administrative function.

If you transfer to this page directly from a functional area, the variable data transfers from there. If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data transfers in from the functional area.

 (communications)
Click to transfer to the Communication Management 1 page or the Organization Communication 1 page, where you can add a new communication for the individual or organization.

 (checklists)
Click to transfer to the Checklists Management 1 page or the Organization Checklist Management 1 page where you can add a new checklist for the individual or organization.

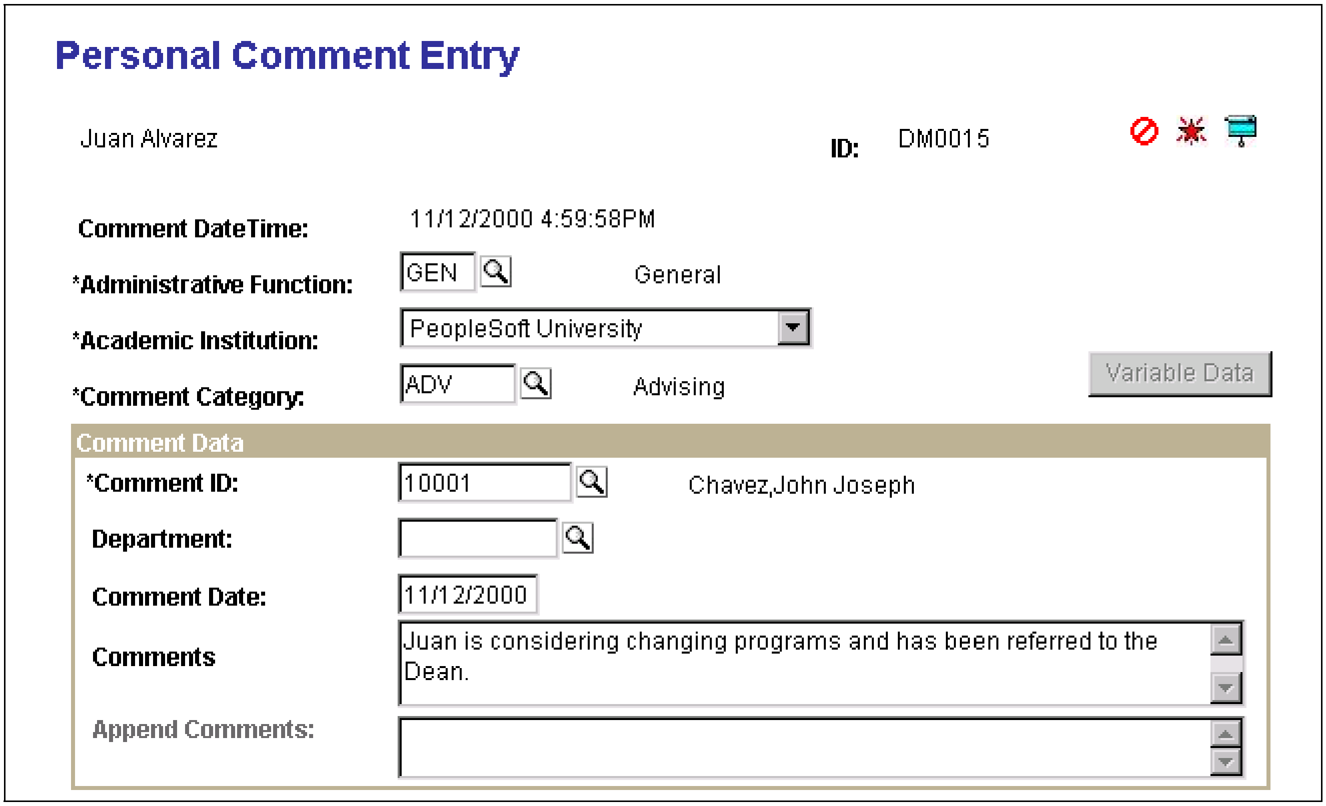
 (comments)
Click to transfer to the Personal Comment Entry page or the Organizational Comments page where you can enter a new comment for the individual or organization.

Pages Used to Enter Comments

Page Name	Object Name	Navigation	Usage
Personal Comment Entry	CMNT_ENTRY1	• Build Community, Comments, Use, Personal Comments, Comment Entry • Build Community, Comments, Inquire, Personal Comment Detail, Comment Detail • Manage Student Financials, Collect Receivables, Use, Create Comments, Comment Entry	Enter comments about an individual.
Organizational Comment Entry	ORG_CMNT_ENTRY1	• Build Community, Comments, Use, Organization Comments, Organization Comment Entry • Build Community, Comments, Inquire, Organization Comment Detail, Comment Detail • Manage Student Financials, Collect Receivables, Use, Organization Comments, Organization Comment Entry	Enter comments about an organization
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Personal Comment Entry page or on the Organizational Comment Entry page.	Review or change variable data for an individual or organization.

Entering Comments About an Individual

Access the Personal Comment Entry page.



Personal Comment Entry page

Administrative Function The code for the administrative area with which this comment is associated.

Academic Institution The academic institution with which this comment is associated.

Comment Category The business need with which the comment is associated.

Variable Data Click to access the Variable Data page where you can view or enter the variable data associated with the specified administrative function. If you transferred to this page directly from a functional area, the variable data automatically transferred from there.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data transferred in from the functional area.

Comment Data

Comment ID The ID of the person entering the comment.

Department The department of the person entering the comment.

Comment Date The date when the comment is entered. The default date is the system's current date. You can override this date.

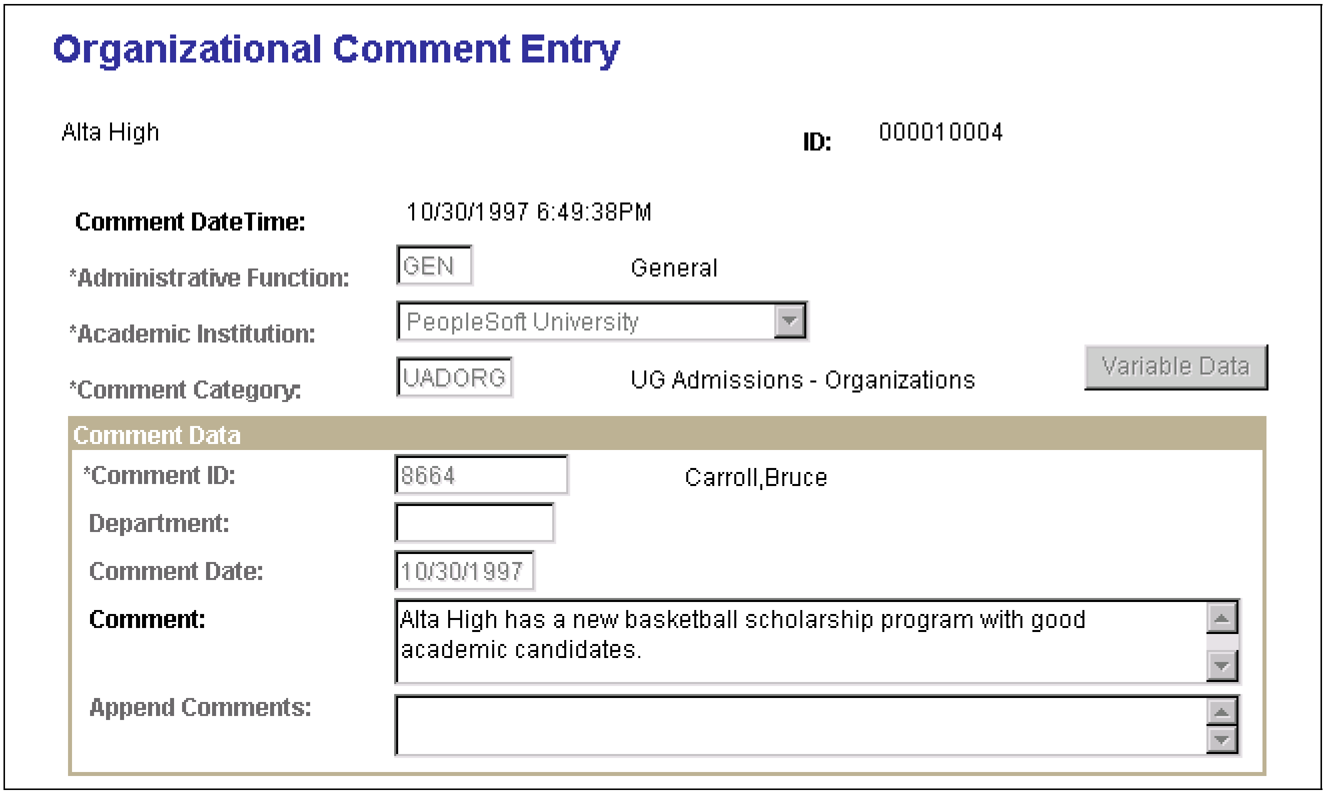
Comments The system displays the default comment, if any, from the Comment Categories page. If the default comment is set to *Allow Changes* this field is editable.

Append Comments

If the default comment is set to *Append,* this field is available. When the page is saved, comments entered in this field are appended to the end of the default comments

Entering Comments About an Organization

Access the Organizational Comment Entry page



Organizational Comment Entry page

Administrative Function

The administrative area with which this comment is most closely associated.

Academic Institution

The academic institution with which this comment is most closely associated.

Comment Category

The business need with which the comment is associated.

Variable Data

Click to access the Variable Data page where you can view or enter the variable data associated with the specified administrative function. If you transferred to this page directly from a functional, the variable data transferred from there.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred in from the functional area.

Comment Data

Comment ID

The ID of the person entering the comment.

Department

The department of the person entering the comment.

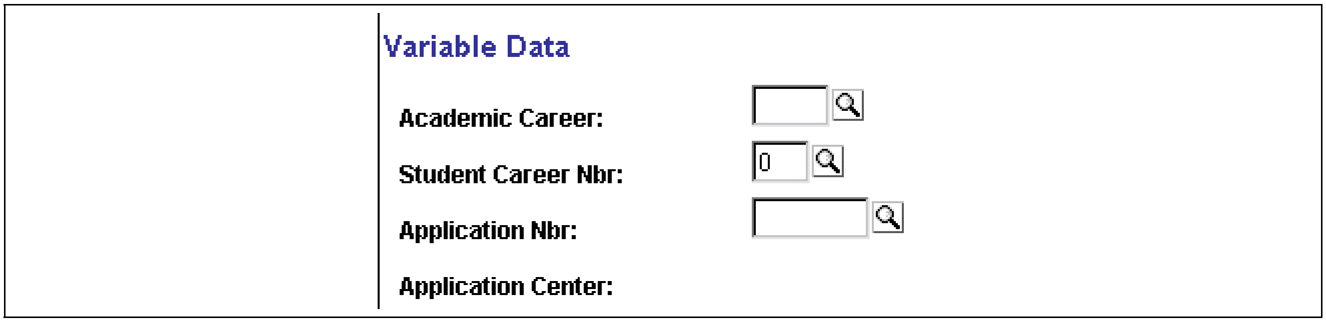
Comment Date The date when the comment is entered. The default date is the system's current date. You can override this date.

Comments The system displays the default comment, if any, from the Comment Categories page. If the default comment is set to *Allow Changes,* this field is editable.

Append Comments If the default comment is set to *Append,* this field is available. When the page is saved, comments entered in this field are appended to the end of the default comments

Reviewing or Changing Variable Data

Access the Variable Data page.



Variable Data page (organization)

Different fields and data appear on this page, based on the individual Personal Comment Entry page or the organization and administrative function selected on the Organizational Comments page.

See Also

Chapter 12, "Setting Up Administrative Functions," page 105

Viewing Comments

This section discusses how to:

- Review a summary of comments about an individual.
- Review a summary of comments about an organization.
- Review comments by 3C group.
- Review comments.

Note. Users can access only those comments to which they have been granted 3C group security. With 3C group inquiry access, users can view the comments but cannot change them. With 3C Group update access, users can view and change the comments.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Setting User Defaults," Selecting the Type of 3C Group Access

Common Elements Used in This Section

Edit or **View**	Click to access the Personal Comment Entry page or Organizational Comments page where, depending on your 3C group security level for the category, you can view or edit the comment about the individual or organization. Edit is available for 3C group *update* access. View is available for 3C group *inquiry* access.
Category	The code for the category with which the comment is associated.
Description	The description of the category with which the comment is associated.
Function	The code for the administrative area with which the comment is associated.
DateTime	The date and time when the comment was entered.
Sequence	The number of the comment in the list of comments for the individual or organization.
Selection Criteria (area)	If you click Search without entering any values, the system searches for all comments for the ID and displays the results at the bottom of the page. Enter values or any combination of values *(Function, Category,* or *Comment ID)* to limit the search.
Comment ID (tab)	Click to determine the ID and name of the person who created the comments.

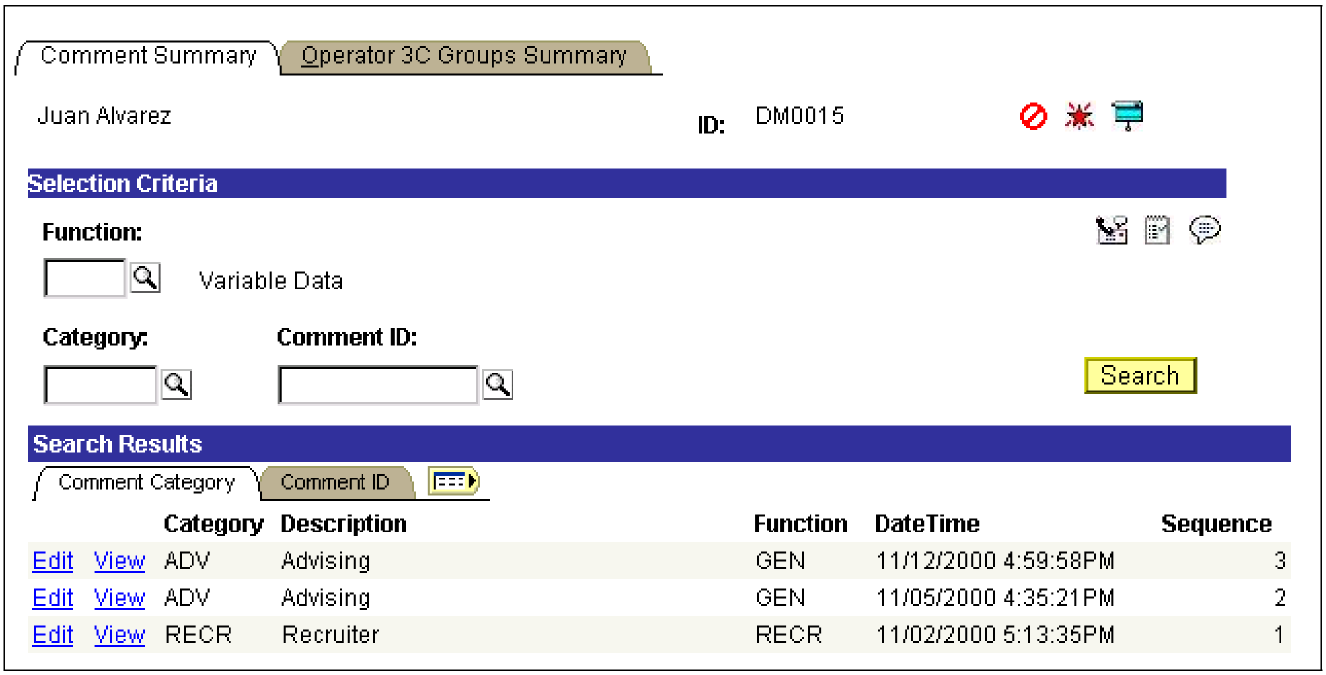
Pages Used to View Comments

Page Name	Object Name	Navigation	Usage
Comment Summary	CMNT_SUMMARY	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Comments, Inquire, Personal Comment Summary, Comment Summary • Manage Student Financials, Collect Receivables, Inquire, Comment Summary, Comment Summary • Develop Enrollment, Process Applications, Inquire, Comment Summary, Comment Summary • Administer Financial Aid, Process Loans, Inquire 1, Comment Summary, Comment Summary • Manage Student Records, Track Student Careers, Inquire, Comment Summary, Comment Summary	View a summary of comments about an individual.
Organization Comment Summary	ORG_CMNT_SUMMARY	• Build Community, Comments, Inquire, Organization Comment Summary, Organization Comment Summary • Manage Student Financials, Collect Receivables, Inquire, Organization Comment Summary, Organization Comment Summary	View a summary of comments about an organization.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	Build Community, Comments, Inquire, Personal Comment Summary, Operator 3C Groups Summary	View or change an individual's 3C group inquiry or update access.
Personal Comment Detail	CMNT_ENTRY1	Build Community, Comments, Inquire, Personal Comment Detail	View the details of a comment about an individual. (This a view-only version of the Personal Comment page.)

Page Name	Object Name	Navigation	Usage
Organization Comment Detail	ORG_CMNT_ENTRY1	Build Community, Comments, Inquire, Organization Comment Detail	View the details of a comment about an organization. (This is a view-only version of the Organization Comment page.)

Reviewing a Summary of Comments About an Individual

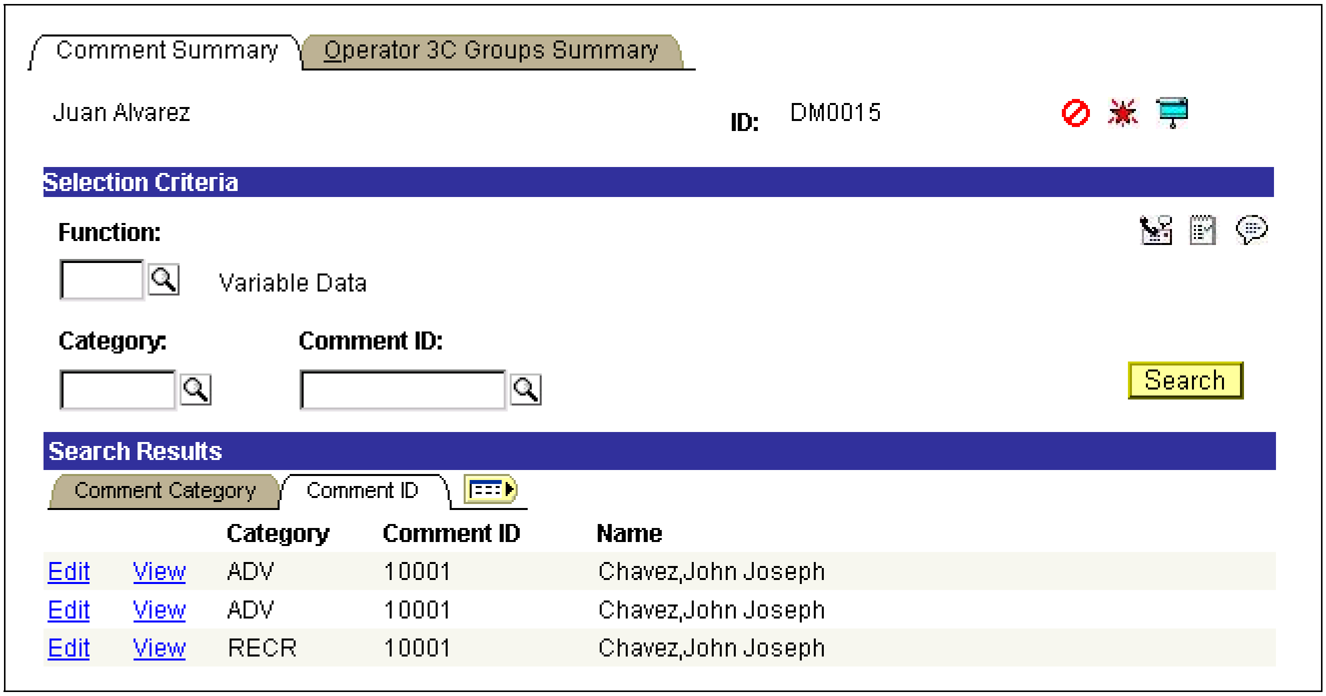
Access the Comment Summary page's Comment Category tab area.



Comment Summary page: Comment Category tab

Determining Who Entered the Comment About the Individual

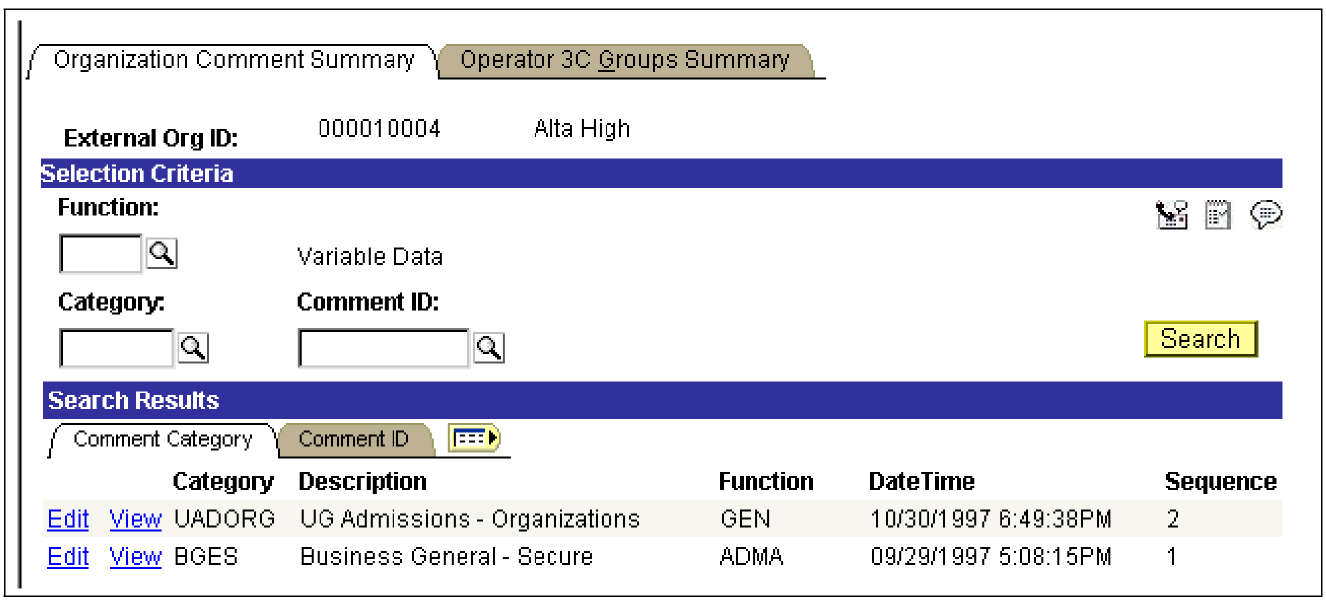
Access the Comment Summary page's Comment ID tab area.



Comment Summary page: Comment ID tab

Reviewing a Summary of Comments about an Organization

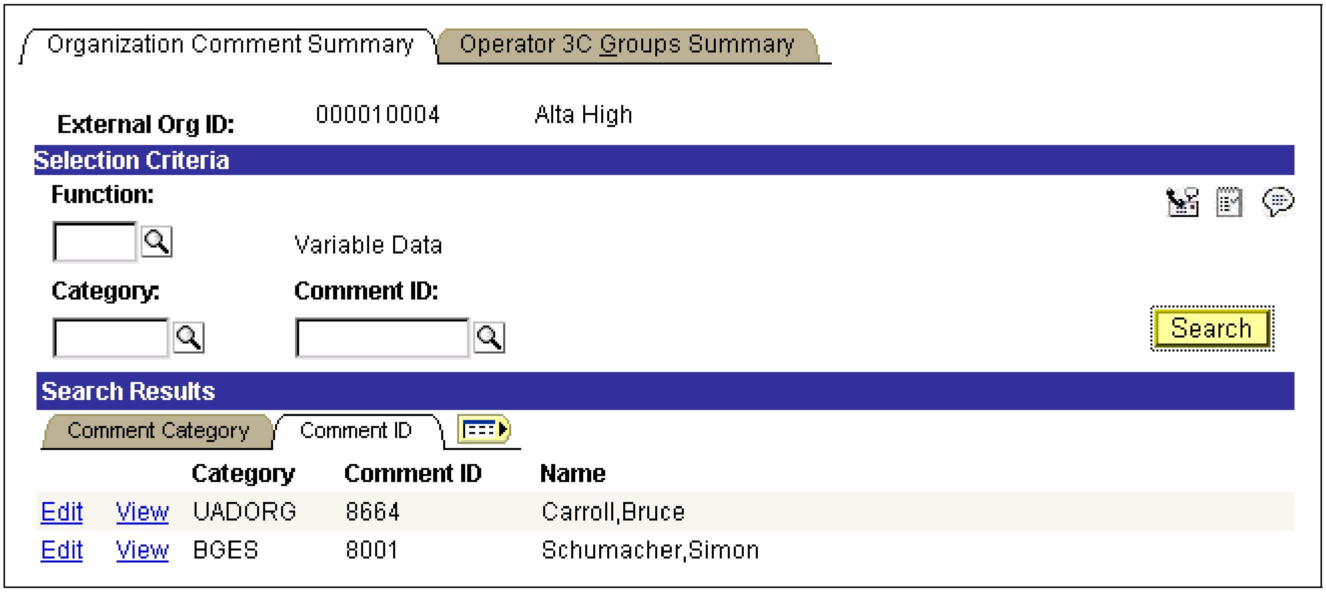
Access the Organization Comment Summary page's Comment Category tab area.



Organization Comment Summary: Comment Category tab

Determining Who Entered the Comment About the Organization

Access the Organization Comment Summary page's Comment ID tab area.



Organization Comment Summary: Comment ID tab

Reviewing Comments by 3C Group

Access the Operator 3C Groups Summary page.

Chapter 28

Managing Checklists

This chapter provides an overview of checklists and discusses how to:

- Assign checklists to individuals.
- Assign checklists to organizations.
- Assign checklists to events.
- View or change checklist 3C group access.
- Update checklists manually by ID.
- Update checklists manually by item.
- Update checklists automatically by item.
- Update checklists automatically by area.
- Review checklists for individuals.
- Review checklists for organizations.

Understanding Checklists

Use checklists to assign lists of requirements to individuals, organizations, events, or groups of individuals and monitor progress toward completing those requirements. You can use to track applications, organize recruitment mailings, assign tasks to staff members, generate a series of communication items, and so on.

You can assign checklists to an organization. For example, you might want to assign a checklist of recruitment items required from a specific high school, including a roster of top ten percent of current graduating class, list of athletic award winners, and scholarship applicants.

You can assign checklists to events. For example, if you are presenting a conference you might want to create a checklist of things to do, including sending out invitations, booking a keynote speaker, setting food menus, and so on.

For each checklist item that you assign, you can specify the individual who is responsible for that item and the due date. You can also specify an ultimate due date for the overall checklist.

 (checklists)	After a checklist is assigned, you can, with appropriate security access, click the Create Checklists button on a page in a functional area about that individual or organization to view or update their checklists.

You can also navigate through the menus, as described in this section, to access the checklist management pages.

You can update the status of checklist items manually on the same checklist management pages where you assign the items, or you can view a summary of all checklist items assigned to an individual or organization and manually update each checklist item status there.

You can update a specific checklist item for the IDs that you indicate. For example, when your recruiter makes phone calls to several prospects, he or she could select the Recruiter Phone Call checklist item to update and enter the ID of each individual who was called. When the page is saved, the system updates the status of the Recruiter Phone Call checklist item for each of the specified individuals.

You can use automated processes to update checklists, too. You can specify criteria to run either the Update − Automated process or the Update Checklists − by Item process to update checklists in the background.

Run the Item Update – Automated background process to update the status of either a specific checklist item or all checklist items in three general areas (transcripts, general materials, and test scores) across the IDs that you specify. The process updates the checklists in the background, and, once set up, does not require manual intervention. It automatically checks the status indicator for all items in each area that you select and, upon encountering a status of complete for an item, updates the status of the relevant checklist.

You can use the 3C engine to automatically update checklist items either in the background or in realtime based on rules and events that you define.

Note. The 3C engine cannot update items that include organization and name IDs. You must update checklists for transcripts, test scores, and general material items either manually or by using the Item Update − Automated process.

You can review checklist information several ways. You can review checklist information for an individual, organization, or event. Or you can review checklist information by tracking group for an individual or for an organization. You can review detailed checklist data for an organization, or you can search for a summary of the checklist data that you want to review for an organization. You can also review organization checklists by the tracking groups to which their checklist items are assigned.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Personal Portfolio Collaborative Application you can use the self-service pages described here.

See Chapter 40, “Using PeopleSoft Personal Portfolio Collaborative Application,” Exposing Self-Service Checklists Data, page 518.

See Also

Chapter 23, “Understanding the 3Cs—Communications, Checklists, and Comments,” page 239

Chapter 24, “Using the 3C Engine,” page 241

Chapter 25, “Understanding Mass Change for 3Cs,” page 263

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Using Mass Change”

Prerequisites

Before you can assign and monitor checklists, you must set up checklist item codes and checklist templates. To use the full functionality of checklist management, you should also be familiar with administrative functions and 3C group security and ensure that they are properly set up.

See Also

Chapter 15, "Setting Up Checklists," page 129

Chapter 12, "Setting Up Administrative Functions," page 105

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Campus Community Security and Copying User Security," Setting Up 3C Group Security

Common Elements Used in This Chapter

 (communications)	Click to transfer to where you can add a new communication for the individual or organization.
 (checklists)	Click to transfer to where you can add a new checklist for the individual or organization.
 (comments)	Click to transfer to where you can enter a new comment for the individual or organization
View or **Edit**	Click to transfer to where you can view or edit the communication assignment.

Note. The View link is available when the user has 3C group *inquiry* access for the communication category. The Edit link is available only when the user has 3C group *update* access for the communication category.

Assigning Checklists to Individuals

This discusses how to:

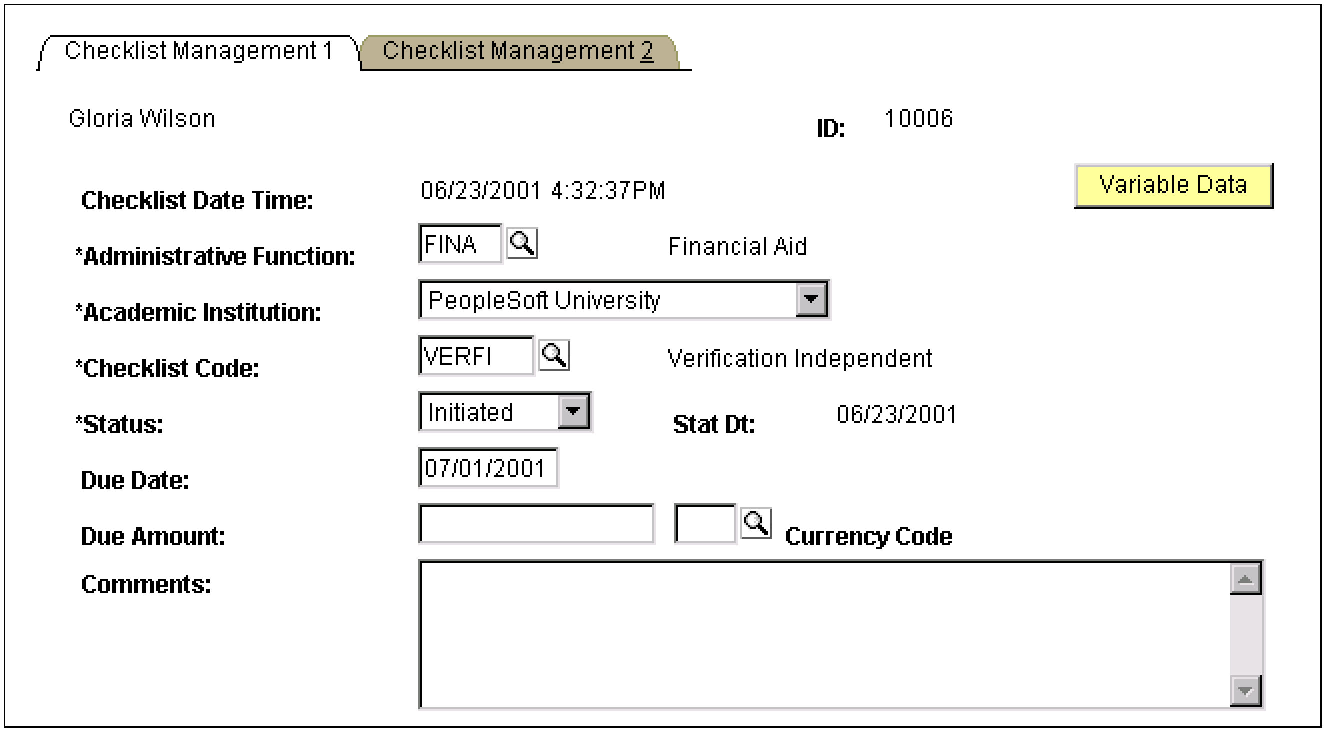
- Assign a checklist to an individual.
- Review or update variable data for an individual.
- Assign checklist items to an individual's checklist.

Pages Used to Assign Checklists to Individuals

Page Name	Object Name	Navigation	Usage
Checklist Management 1	PERS_CHKLST_MGMT1	• Build Community, Checklists, Use, Checklist Management – Person, Checklist Management 1 • Build Community, Checklists, Inquire, Person Checklist Detail, Checklist Detail 1 • Manage Student Financials, Collect Receivables, Use, Checklist Management, Checklist Management 1	Assign a checklist to an individual.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Checklist Management 1 page.	Review or edit variable data for an individual
Checklist Management 2	PERS_CHKLST_MGMT2	• Build Community, Checklists, Use, Checklist Management – Person, Checklist Management 2 • Build Community, Checklists, Inquire, Person Checklist Detail, Checklist Detail 2 • Manage Student Financials, Collect Receivables, Use, Checklist Management, Checklist Management 2	Place checklist items on an individual’s checklist and identify who is responsible for each item.

Assigning a Checklist to an Individual

Access the Checklist Management 1 page.



Checklist Management 1 page

Administrative Function

The code for the functional area with which this individual is associated.

The available administrative function codes are from the Administrative Functions page.

If you accessed this page from another page, the system automatically displays the administrative function from that page.

Checklist Code

The code that describes the checklist assigned to this individual.

The only checklist codes available are those associated with administrative function on the Checklist Item Functions page.

Due Date

The date by which the entire checklist must be completed for this individual.

Due Amount

The monetary amount, if any, that is due as part of this checklist and the currency in which it is expressed.

Comments

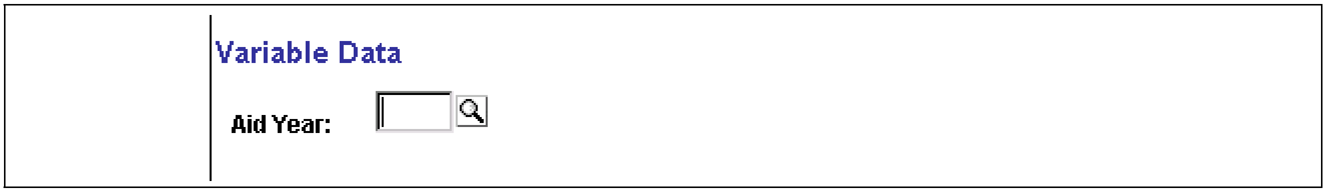
Comments to further identify or describe the checklist for this individual.

Variable Data

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer.

Reviewing or Updating Variable Data for an Individual

Access the Variable Data page.



Variable Data page (individual)

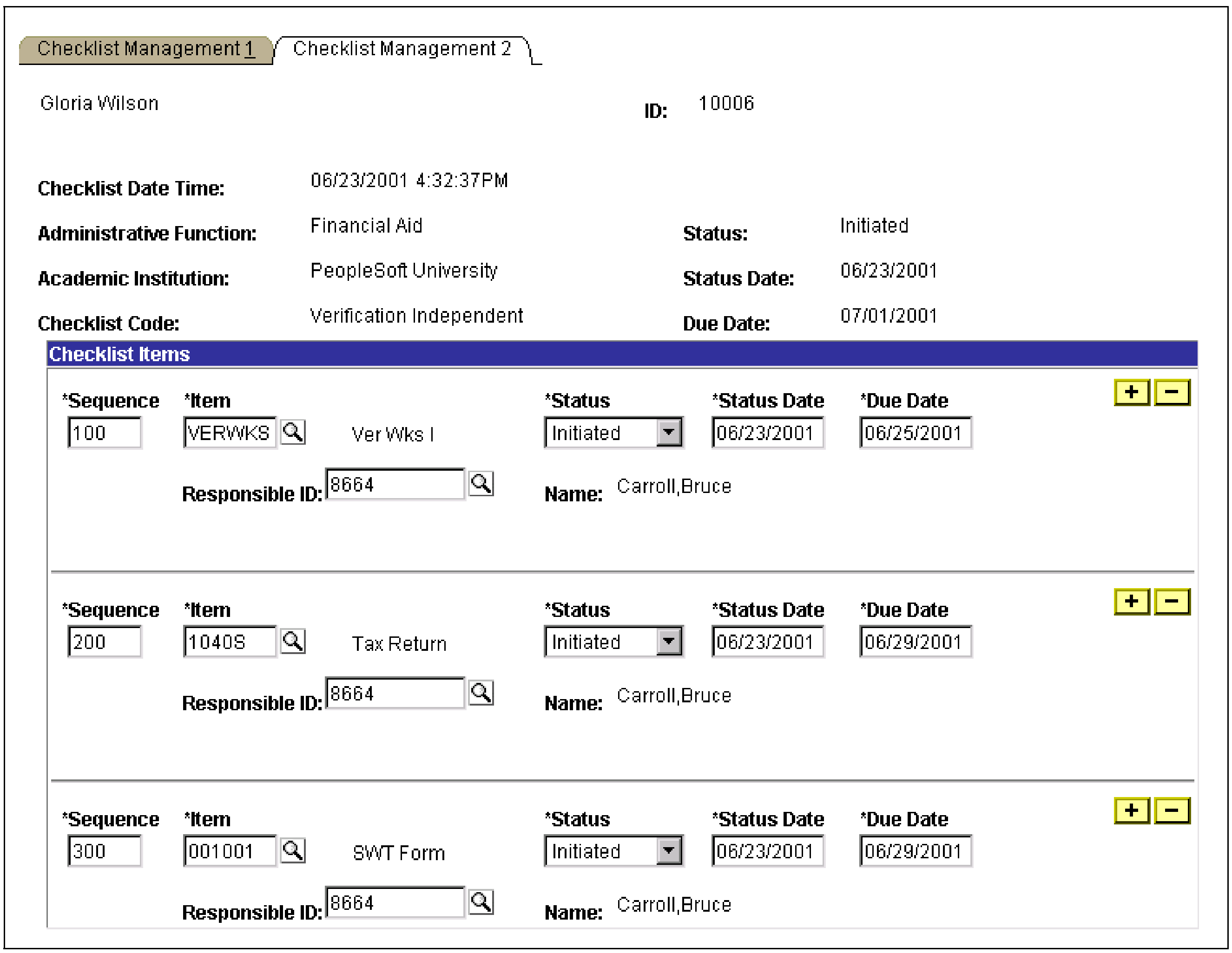
Different fields and data appear on this page based on the individual and the administrative function selected on the Checklist Management 1 page.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Securing Campus Community Security and Copying User Security,” Setting Up 3C Group Security

Assigning Checklist Items to an Individual’s Checklist

Access the Checklist Management 2 page.



Checklist Management 2 page

Note. The checklist items associated with the specified checklist code on the Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page where all checklist items associated with the specified administrative function are available.

Checklist Sequence The number of this checklist item in the list of checklist items for this individual.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.

Item The code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.

Status The status of the checklist item: *Initiated, Completed, Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived,* or *Cancelled.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status Date The date of the current status.

Due Date The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Responsible ID The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database.

Assigning Checklists to Organizations

This section discusses how to:

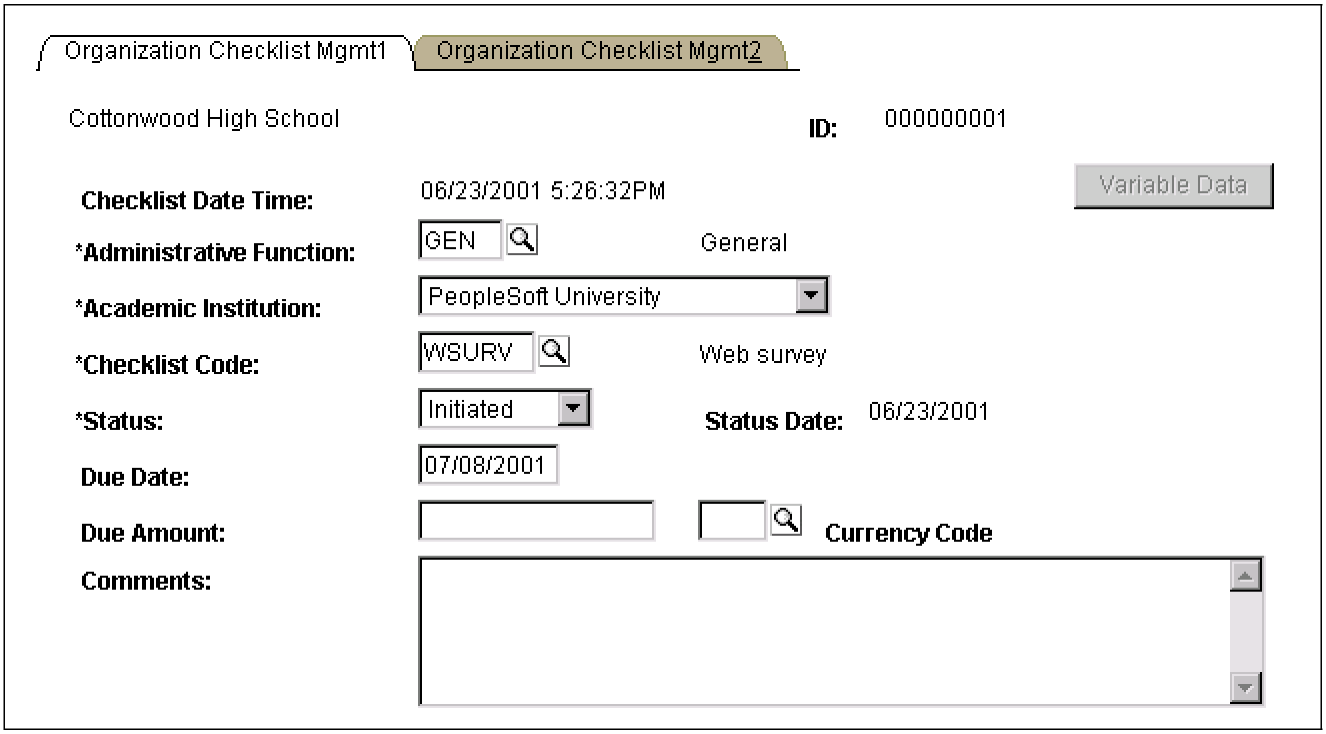
- Assign a checklist to an organization.
- Review or update variable data for an organization.
- Assign checklist items to an organization's checklist.

Pages Used to Assign Checklists to Organizations

Page Name	Object Name	Navigation	Usage
Organization Checklist Management 1	ORG_CHKLST_MGMT1	• Build Community, Checklists, Use, Checklist Management – Org, Org Checklist Mgmt 1 • Build Community, Checklists, Inquire, Org Checklist Detail, Org Checklist Detail 1 • Manage Student Financials, Collect Receivables, Use, Organization Checklist Mgmt, Org Checklist Mgmt 1	Assign a checklist to an organization.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Organization Checklist Management 1 page.	Enter or review variable data for an organization.
Organization Checklist Management 2	ORG_CHKLST_MGMT2	• Build Community, Checklists, Use, Checklist Management – Org, Org Checklist Mgmt 2 • Build Community, Checklists, Inquire, Org Checklist Detail, Org Checklist Detail 2 • Manage Student Financials, Collect Receivables, Use, Organization Checklist Mgmt, Org Checklist Mgmt 2	Place checklist items on an organization's checklist and identify who is responsible for each item.

Assigning a Checklist to an Organization

Access the Organization Checklist Management 1 page.



Organization Checklist Management 1 page

Administrative Function

The code for the functional area with which this organization is associated.

The available administrative function codes are from the Administrative Functions page.

If you accessed this page from another page, the system automatically displays the administrative function from that page.

Checklist Code

The code that describes the checklist assigned to this organization.

The only checklist codes available are those associated with administrative function on the Checklist Item Functions page.

Status

The status of the checklist item: *Initiated, Completed, Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived,* or *Cancelled.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Due Date

The date by which the entire checklist must be completed for this organization.

Due Amount

The monetary amount, if any, that is due as part of this checklist and the currency in which it is expressed.

Comments

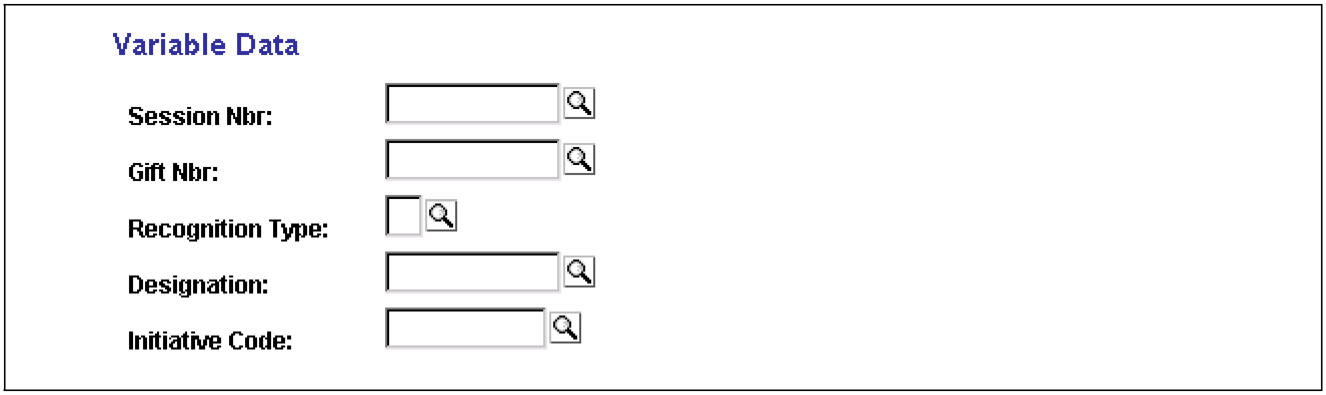
Comments to further identify or describe the checklist for this organization.

Variable Data

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer.

Reviewing or Updating Variable Data for an Organization

Access the Variable Data page.



Variable Data page (organization)

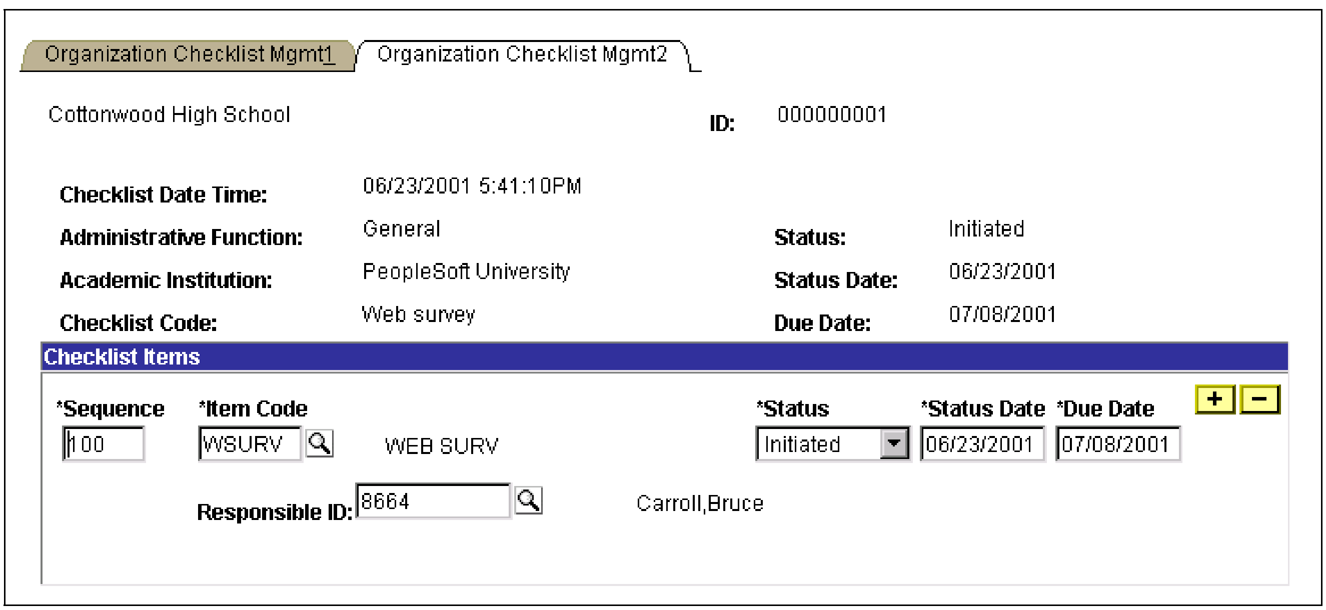
Different fields and data appear on this page, based on the individual and the administrative function selected on the Organization Checklist Management 1 page.

See Also

Chapter 12, "Setting Up Administrative Functions," page 105

Assigning a Checklist Item to an Organization's Checklist

Access the Organization Checklist Management 2 page.



Organization Checklist Management 2 page

Note. The checklist items associated with the specified checklist code on the Organization Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page where all checklist items associated with the specified administrative function are available.

Checklist Sequence The number of this checklist item in the list of checklist items for this organization.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.

Item The code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.

Status The status of the checklist item: *Initiated, In Progress,* or *Completed.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status Date The date of the current status.

Due Date The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Responsible ID The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database.

Assigning Checklists to Events

This section discusses how to:

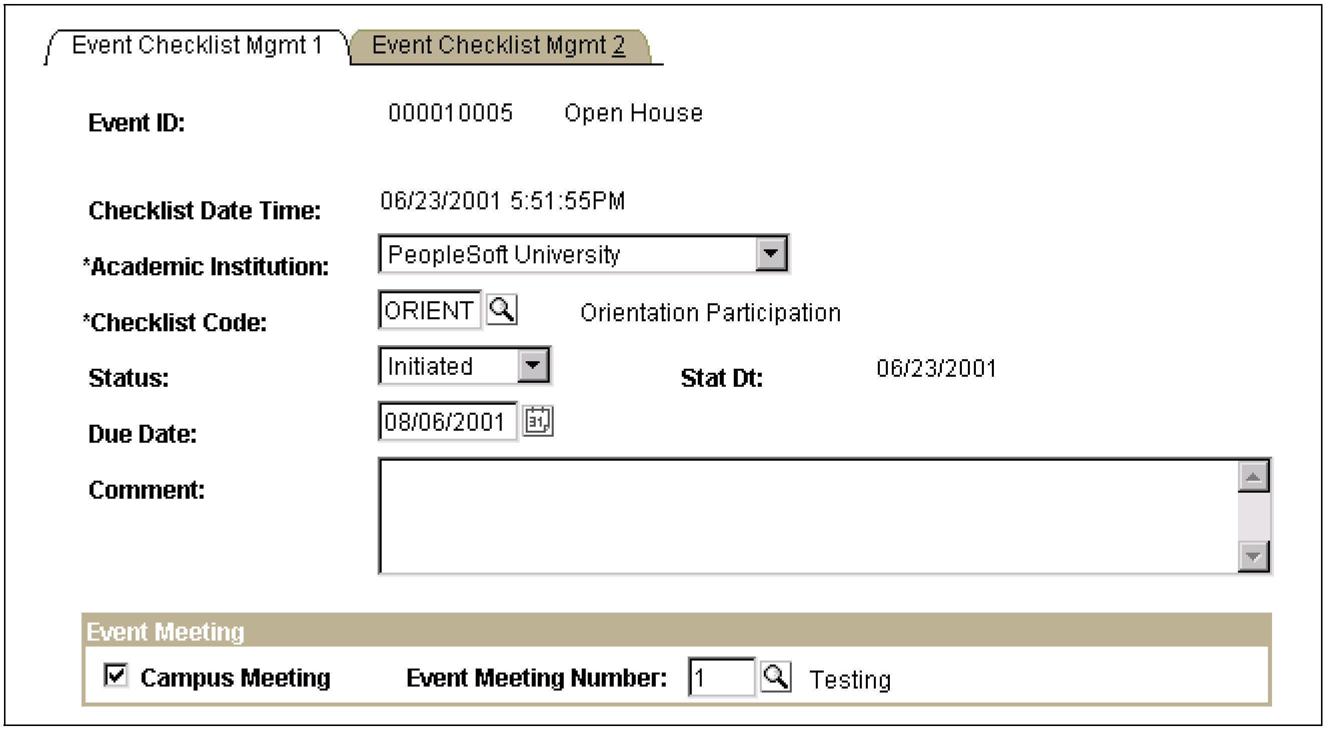
- Assign checklist items to an event's checklist.
- Assign a checklist to an event.

Pages Used to Assign Checklists to Events

Page Name	Object Name	Navigation	Usage
Event Checklist Management 1	EVENT_CHKLST_MGMT1	Build Community, Checklists, Use, Checklist Management – Event, Event Checklist Mgmt 1	Specify checklist items for an event by selecting the meetings that make up the event.
Event Checklist Management 2	EVENT_CHKLST_MGMT2	Build Community, Checklists, Use, Checklist Management – Event, Event Checklist Mgmt 2	Assign a checklist to an event

Assigning a Checklist Item to an Event's Checklist

Access the Event Checklist Management 1 page.



Event Checklist Management 1 page

Academic Institution

The academic institution with which this event is associated.

The academic institutions available are from the Institution Table page.

Checklist Code

The code that describes the checklist assigned to this organization.

The only checklist codes available are those associated with the EVNT (Event) administrative function on the Checklist Item Functions page.

Status

The status of the checklist item: *Initiated, In Progress,* or *Completed.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status Date

The date of the current status.

Due Date

The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Event Meeting

Enter event variable data in this section. This is similar to variable data for individuals and organizations, however the EVNT (Event) administrative function is the only applicable function for events.

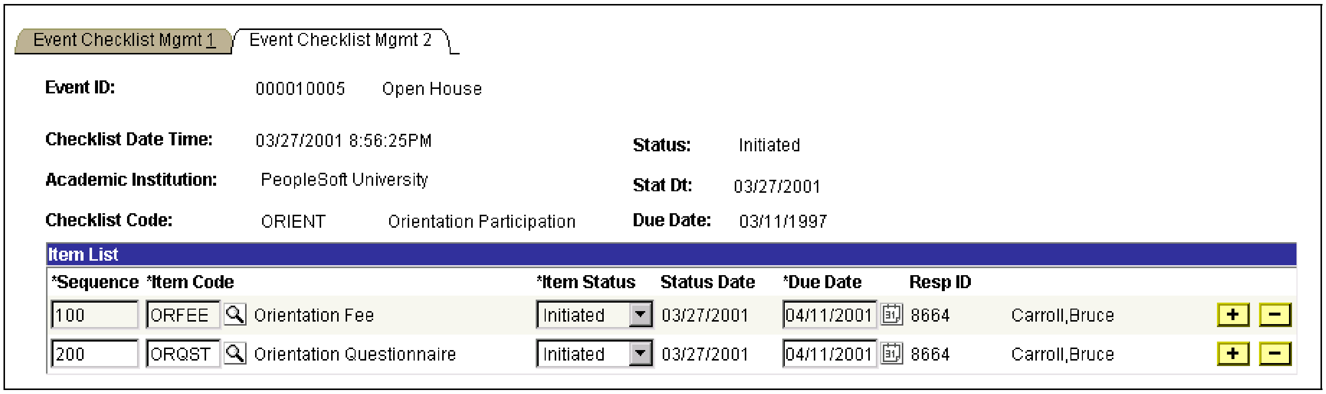
Campus Meeting

When selected, indicates that this checklist is for a specific meeting assigned to this event.

Event Meeting Number The number of the specific meeting to which this checklist is assigned. The available numbers are from the Meetings Details page for this event.

Assigning a Checklist to an Event

Access the Event Checklist Management 2 page.


Event Checklist Mgmt 1 | Event Checklist Mgmt 2

Event ID: 000010005 Open House

Checklist Date Time: 03/27/2001 8:56:25PM

Status: Initiated

Academic Institution: PeopleSoft University

Stat Dt: 03/27/2001

Checklist Code: ORIENT Orientation Participation

Due Date: 03/11/1997

Item List

*Sequence	*Item Code		*Item Status	Status Date	*Due Date	Resp ID	
100	ORFEE	Orientation Fee	Initiated	03/27/2001	04/11/2001	8664	Carroll,Bruce
200	ORQST	Orientation Questionnaire	Initiated	03/27/2001	04/11/2001	8664	Carroll,Bruce

Checklist Management 2 page

Note. The checklist items associated with the specified checklist code on the Event Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page where all checklist items associated with the specified administrative function are available.

Checklist Sequence The number of this checklist item in the list of checklist items for this organization.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.

Item The code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.

Status The status of the checklist item: *Initiated, In Progress,* or *Completed.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status Date The date of the current status.

Due Date The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Responsible ID The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database.

Viewing or Changing Checklist 3C Group Access

You can view or change an individual's 3C group security access.

Note. Users can access only those checklists to which they are granted 3C group security. With 3C group inquiry access, users can view the checklists, but cannot change them. With 3C group update access, users can view and change the checklists.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Setting User Defaults," Selecting the Type of 3C Group Access.

Viewing or Updating Checklist Item Status for an ID

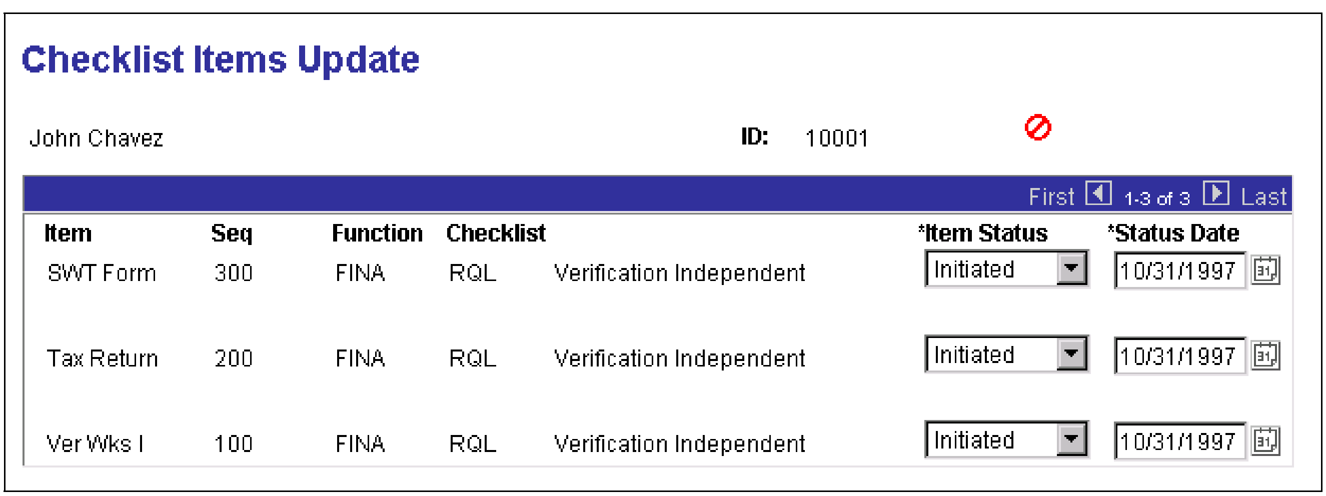
This section discusses how to access a summary of checklists by ID.

Page Used to View or Update Checklist Item Status for an ID

Page Name	Object Name	Navigation	Usage
Checklist Items Update	PERS_CHKLST_UPDATE	• Build Community, Checklists, Use, Item Update – by Person, Checklist Items Update • Manage Student Financials, Collect Receivables, Use, Checklist Items Update, Checklist Items Update	Access a summary of checklists for an ID (individual or organization) to confirm or update checklist item status.

Viewing a Summary of Checklists by ID

Access the Checklist Items Update page.



Checklist Items Update page

Item, Sequence Number, Function, and **Checklist**: The system displays information for these from all the checklists assigned to the individual on the Checklist Management 1 page.

Item Status: Enter the updated status of the checklist item: *Initiated, In Progress,* or *Completed.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status Date: When you update the status of a checklist item, the system automatically changes the status date to the system's current date. You can override this date.

Updating a Checklist Item for One or More IDs (Update — by Item Process)

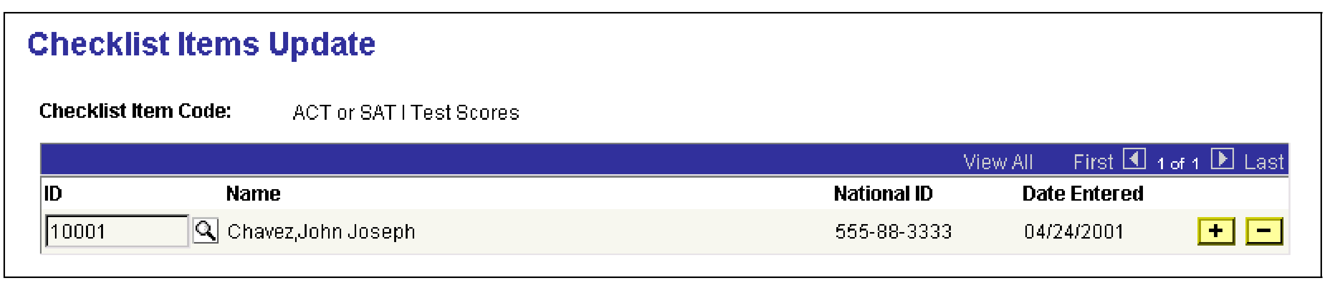
This section discusses how to specify the checklists item to update.

Page Used to Update a Checklist Item for One or More IDs

Page Name	Object Name	Navigation	Usage
Checklist Items Update	CHKLST_ITEM_UPDATE	• Build Community, Checklists, Use, Item Update – by Item, Checklist Update by Item • Manage Student Financials, Collect Receivables, Use, Checklist Update by Item, Checklist Update by Item	Specify the checklist item to update and indicate the individuals for whom to update it when running the Update – by Item process.

Specifying the Checklist Item to Update

Access the Checklist Items Update page.



Checklist Items Update page

ID: Enter the ID of the individual for whom you want to update this checklist item to a status of *Complete.*

Updating One or All Checklist Items on a Checklist for All IDs (Items Update -- by Item Process)

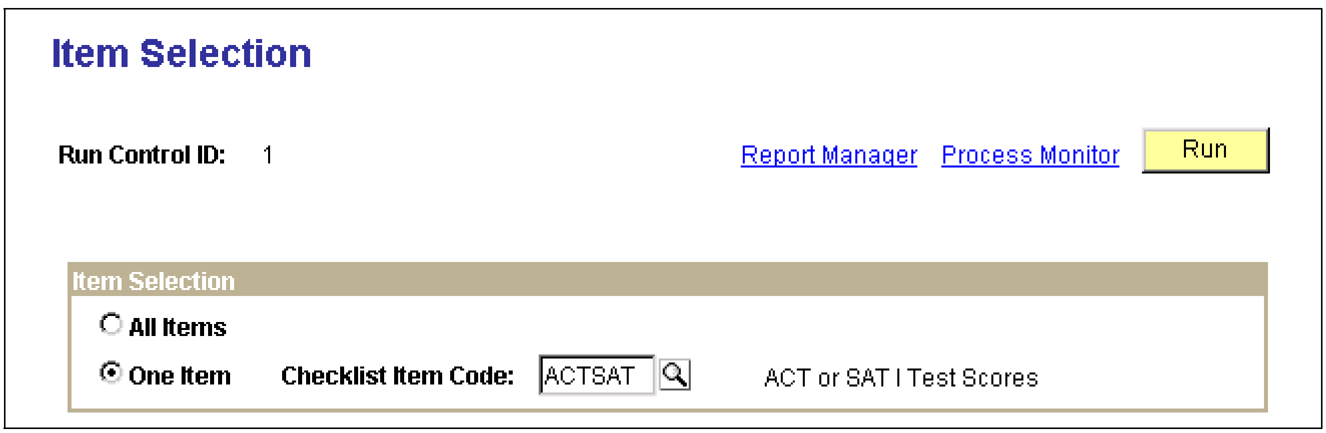
This section discusses how to specify one or all checklist items to update.

Page Used to Update One or All Checklist Items on a Checklist

Page Name	Object Name	Navigation	Usage
Item Selection	RUNCTL_CCCHKLER	• Build Community, Checklists, Process, Item Update – by Item, Item Selection • Manage Student Financials, Collect Receivables, Process, Checklist Item Update, Item Selection	Specify one or all checklist items to update when running the Items Update -- by Item process to update.

Specifying One or All Checklist Items to Update

Access the Item Selection page.



Item Selection page

Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler Request page, where you can specify where a process or job runs and the process output format.

Item Selection

All Items When selected, indicates that the process should update all checklist items specified on the Item Update – by Item table to a status of *Complete.*

One Item When selected, indicates that the process should update one specific checklist item to a status of *Complete.* You must specify the checklist item to be updated.

Checklist Item Code The code for the specific checklist item to be updated.

Updating Test Score, Transcript, or General Material Checklist Items (Checklist Item Update – Automated Process)

This section discusses how to:

- Specify the items and IDs to update.
- Specify the data to update.

See Also

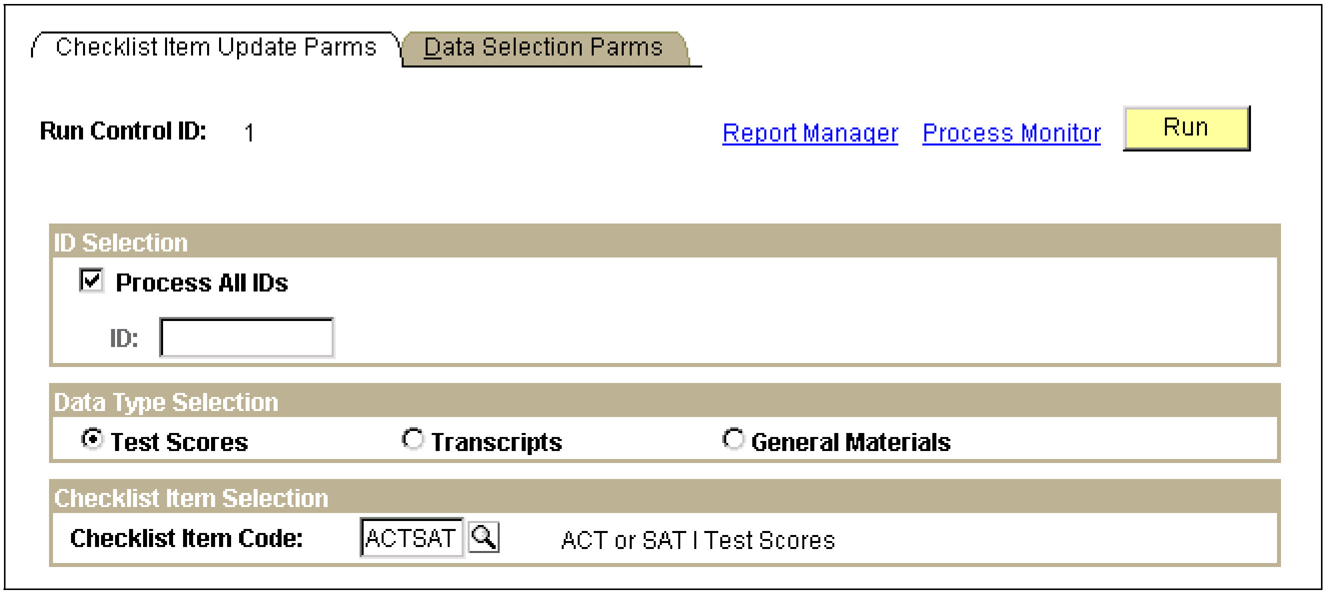
Chapter 12, "Setting Up Administrative Functions," page 105

Pages Used to Update Test Score, Transcript, or General Material Checklist Items

Page Name	Object Name	Navigation	Usage
Checklist Item Update Parameters	RUNCTL_ITMUPD	Build Community, Checklists, Process, Item Update – Automated, Checklist Item Update Parms	Specify the test scores, transcripts, or general materials checklist items and IDs to update when running the Checklist Item Update – Automated background process.
Data Selection Parameters	RUNCTL_ITMUPD_DATA	Build Community, Checklists, Process, Item Update – Automated, Data Selection Parms	Specify the IDs and materials to update when running the Checklist Item Update – Automated process.

Specifying the Items and IDs to Update

Access the Checklist Item Update Parameters page.



Checklist Item Update Parameters page

ID Selection

Process All IDs When selected, indicates that the process should update all eligible checklist items for all IDs in your system.

ID The ID of the specific individual whose checklist item the process should update.

Data Type Selection

Data type selection relates to logic in the process that provides a linkage to admissions records where the applicable data resides. When the Test Scores button is clicked, the process evaluates data in the test score table as it updates checklist items.

Test Scores When selected, indicates that the process should evaluate test score data in PeopleSoft Recruiting and Admissions to update checklist items.

Transcripts When selected, indicates that the process should evaluate transcript data in Recruiting and Admissions to update checklist items.

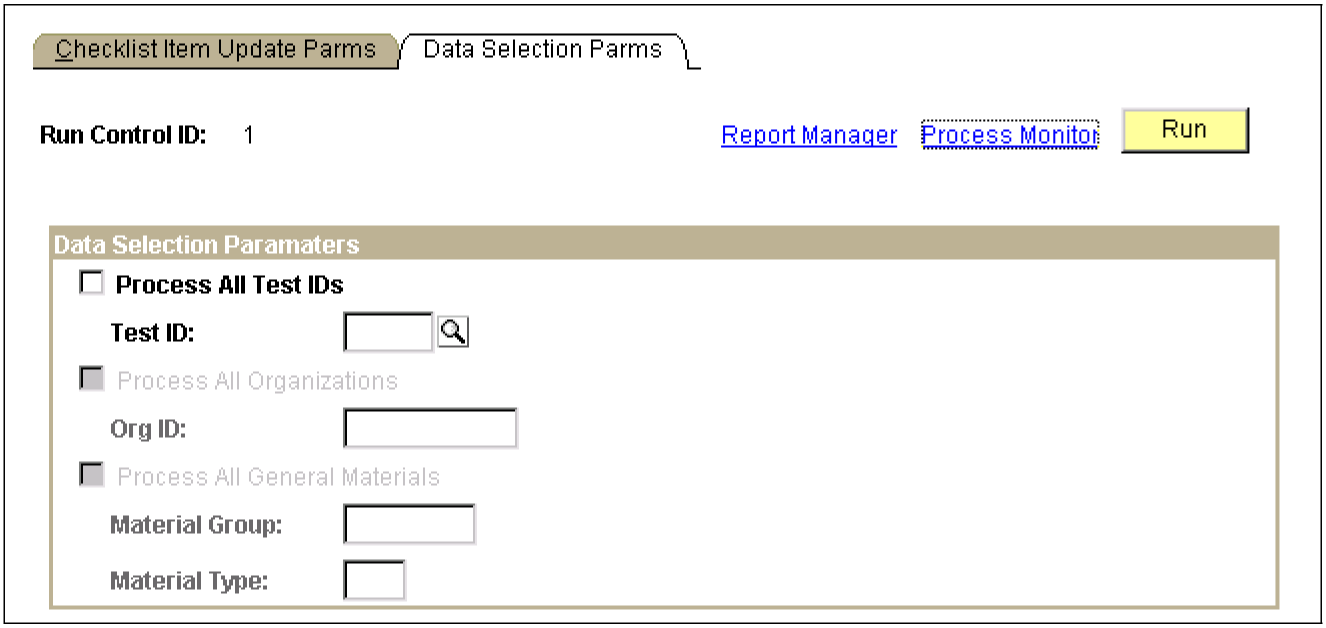
General Materials When selected, indicates that the process should evaluate general materials data in PeopleSoft Recruiting and Admissions to update checklist items.

Checklist Item Selection

Checklist Item Code The code for the checklist item that the process should update for the specified individuals.

Specifying the Data to Update

Access the Data Selection Parameters page.



Data Selection Parameters page

Only the data selection parameters associated with the data types selected on the Update Parameters page are available.

Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler Request page, where you can specify where a process or job runs and the process output format.

ID Selection

If you select the Test Scores option in the Data Selection group box, you must either select Process All Test IDs or specify one test ID.

Process All IDs When selected, indicates that the process should evaluate all Test IDs to update the checklist item for all tests.

ID The specific test on the test scores page, for example *GRE* test, for which the system should evaluate to update this checklist item.

If you select the Transcripts option in the Data Selection group box, you must either select Process All IDs or specify one organization ID.

Process All IDs When selected, indicates that the process should evaluate all transcript data from all organizations to update the checklist item. Transcripts received are recorded by Organization in the PeopleSoft Recruiting and Admissions Education page.

ID The specific organization on the Education page, for example *000010008* (Apache Junction High School), for which the system should update the checklist item.

If you select the General Materials option in the Data selection group box, you must either select Process All IDs to process all general materials or specify one material group or a material type.

Process All IDs When selected, indicates that the process should evaluate all general materials data to update this checklist item

ID Either the specific material group on the General Materials page, for example *UGRECOMM* (Undergraduate Recommendations), for which the system should update this checklist item, or the specific material type on the General Materials page, for example *REC* (Recommendation), for which the system should update this checklist item.

Data Type Selection

Test Scores When selected, indicates the process should evaluate the test IDs specified in the ID Selection group box to update checklist items.

Transcripts When selected, indicates the process should evaluate the transcripts for the organizations specified in the ID Selection group box to update checklist items.

General Materials When selected, indicates the process should evaluate the materials specified in the ID Selection group box to update checklist items.

Reviewing Checklists for Individuals

This section discusses how to:

- View detailed checklist data for an individual.
- View a summary of checklist item status for an individual.
- View a summary of tracking groups for an individual.
- View a summary of checklists in a tracking group for an individual.

Pages Used to Review Checklists for Individuals

Page Name	Object Name	Navigation	Usage
Checklist Detail 1 and Checklist Detail 2	PERS_CHKLST_MGMT1, PERS_CHKLST_MGMT2	Build Community, Checklists, Inquire, Person Checklist Detail	The Checklist Detail 1 and 2 pages are view only versions of the Checklist Management 1 and 2 pages. View detailed checklist data for an individual.

Page Name	Object Name	Navigation	Usage
Checklist Summary	PERS_CHKLST_SUMM	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Checklists, Inquire, Person Checklist Summary, Checklist Summary • Manage Student Financials, Collect Receivables, Inquire, Checklist Summary, Checklist Summary • Develop Enrollment, Process Applications, Inquire, Checklist Summary, Checklist Summary • Administer Financial Aid, Process Loans, Inquire 1, Personal Checklist Summary, Checklist Summary • Develop Enrollment, Recruit Prospective Students, Inquire, Checklist Summary, Checklist Summary • Manage Student Records, Track Student Careers, Inquire, Personal Checklist Summary, Checklist Summary	View a summary of checklist item status for an individual.
Person Tracking Summary	TRACKING_SUMMARY	• Build Community, Checklists, Inquire, Person Tracking Summary, Tracking Summary • Manage Student Financials, Collect Receivables, Inquire, Tracking Summary, Tracking Summary	View a summary of tracking groups for an individual to determine the groups with which an individual's checklists are associated and view the overall status of those tracking groups.
Tracking Group Detail	CHECKLIST_SEC	Click the View link on the Person Tracking Summary page.	View a summary of checklists in a tracking group for an individual.

Viewing Detailed Checklist Data for an Individual

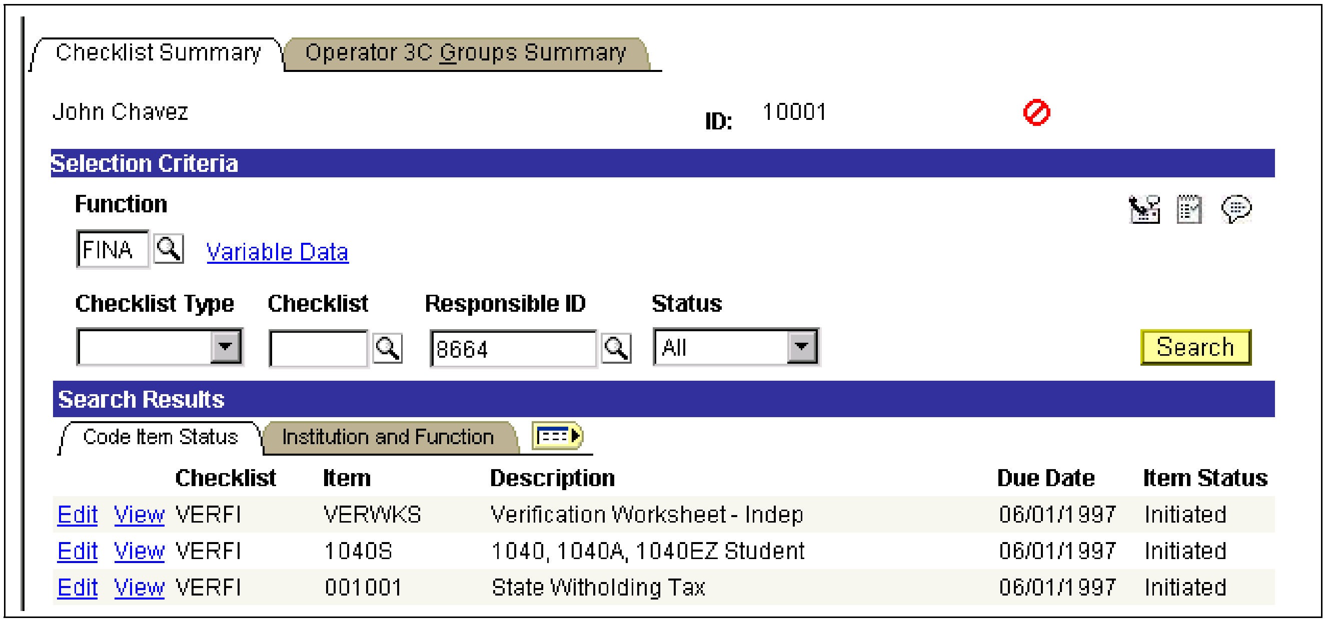
The Checklist Detail 1 and 2 pages are view-only versions of the Checklist Management 1 and 2 pages where you assign checklist items to the individual.

See Also

Chapter 28, "Managing Checklists," Assigning Checklists to Individuals, page 325

Viewing a Summary of Checklist Item Status for an Individual

Access the Checklist Summary page.



Checklist Summary page: Code Item Status tab

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.

Common Page Information

If you click the Search button without entering any values, the system searches for all checklists for the individual and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function The administrative area on which you want to search.

Variable Data Click to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Checklist Type The type of checklist (for example, *Condition List, Communication List,* or *Requirements List*) for which you want to search.

Checklist The name of the checklist for which you want to search. The available checklists are from the Checklists page.

Responsible ID The ID of the individual who is associated with or responsible for the checklist items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status The status of the checklists for which to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

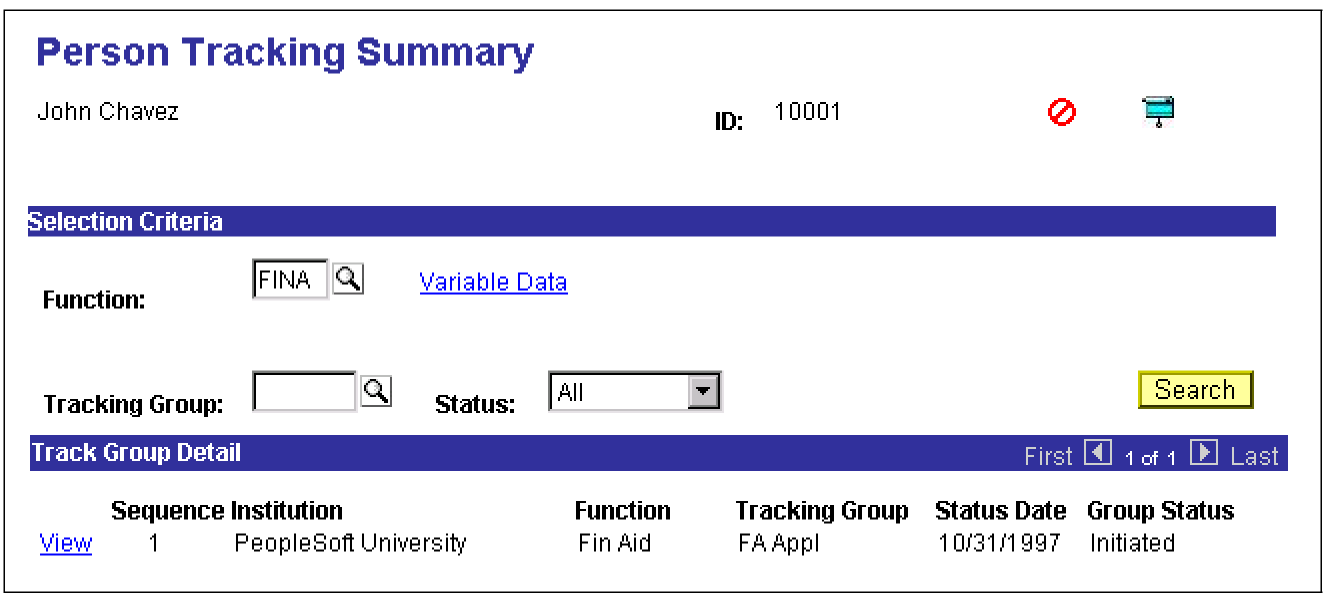
Search Click to launch the search based on the selected criteria.

Institution and Function Tab

Use the Institution and Function tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the person who assigned or is responsible for the checklist item.

Viewing a Summary of Tracking Groups for an Individual

Access the Person Tracking Summary page.



Person Tracking Summary page

Selection Criteria

If you click the Search button without entering any values, the system will search for all tracking groups that include this individual and display the results at the bottom of the page. You can enter a value or any combination of values to limit your search.

Function The administrative area on which you want to search.

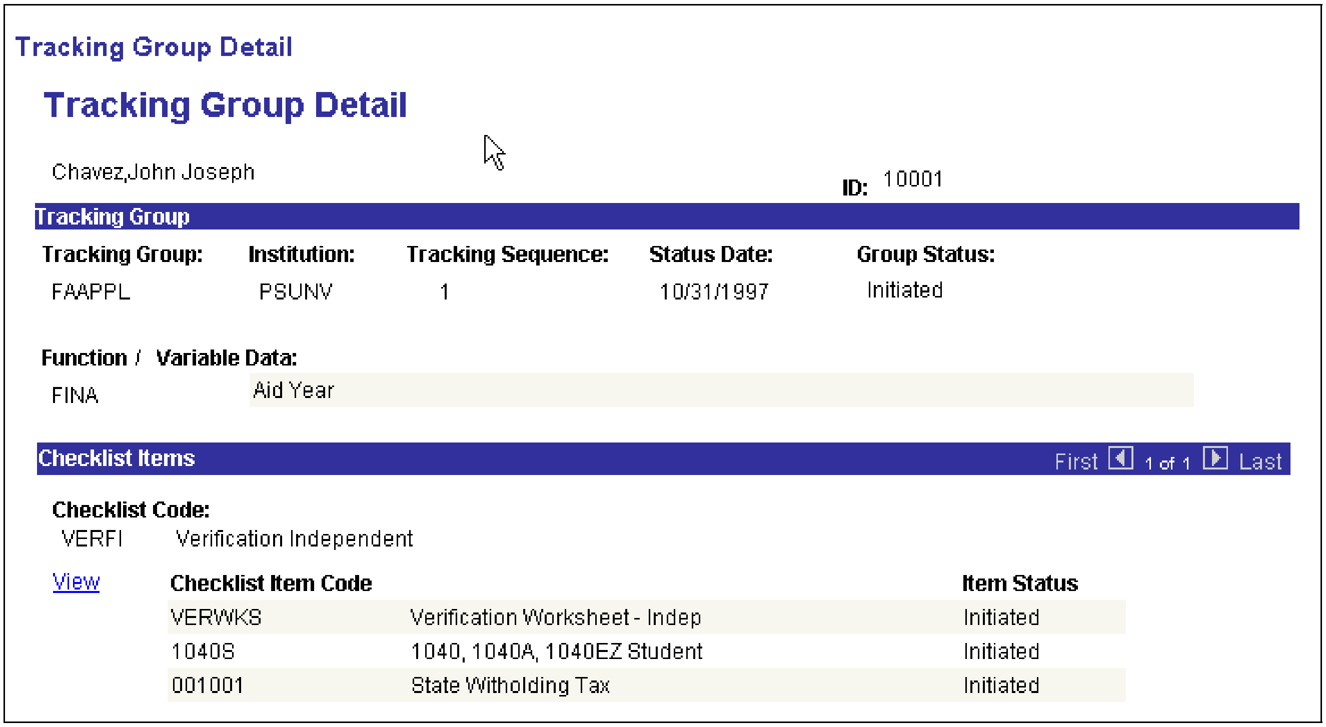
Variable Data	Click to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual. Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.
Tracking Group	The tracking group on which you want to search.
Status	The status of the checklists for which you want to search. *All:* The system searches for all checklist items regardless of status. *Completed:* The system searches for only completed checklist items. *Initiated:* The system searches for only checklist items that have been initiated but not yet completed.
Search	Click to launch the search based on the selected criteria.

Track Group Detail

View	Click to access the Tracking Group page where you can view the checklist. The View link is available only if the user has 3C group inquiry access for this checklist code.

Viewing a Summary of Checklists in a Tracking Group for an Individual

Access the Tracking Group Detail page.



Tracking Group Detail page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Checklists for Organizations

This section discusses how to:

- View detailed checklist data for an organization.
- View a summary of checklists for an individual.
- View a summary of tracking groups for an individual.
- View a summary of checklists in a tracking group for an individual.

Pages Used to Review Checklists for Organizations

Page Name	Object Name	Navigation	Usage
Organization Checklist Detail 1 and 2	ORG_CHKLST_MGMT1, ORG_CHKLST_MGMT2	Build Community, Checklists, Inquire, Org Checklist Detail	View detailed checklist data for an organization.
Organization Checklist Summary	ORG_CHKLST_SUMMARY	• Build Community, Checklists, Inquire, Org Checklist Summary, Org Checklist Summary • Manage Student Financials, Collect Receivables, Inquire, Organizatn Checklist Summary, Org Checklist Summary	View a summary of checklist items for an organization.
Organization Tracking Summary	ORG_TRACK_SUMMARY	Build Community, Checklists, Inquire, Org Tracking Summary, Organization Tracking Summary	Review the tracking groups with which an organization's checklists are associated and the overall status of those tracking groups
Organization Tracking Group Detail	CHECKLIST_SEC	Click the View link on the Organization Tracking Summary page.	Review information about a tracking group checklist for an organization.

Viewing Detailed Checklist Data for an Organization

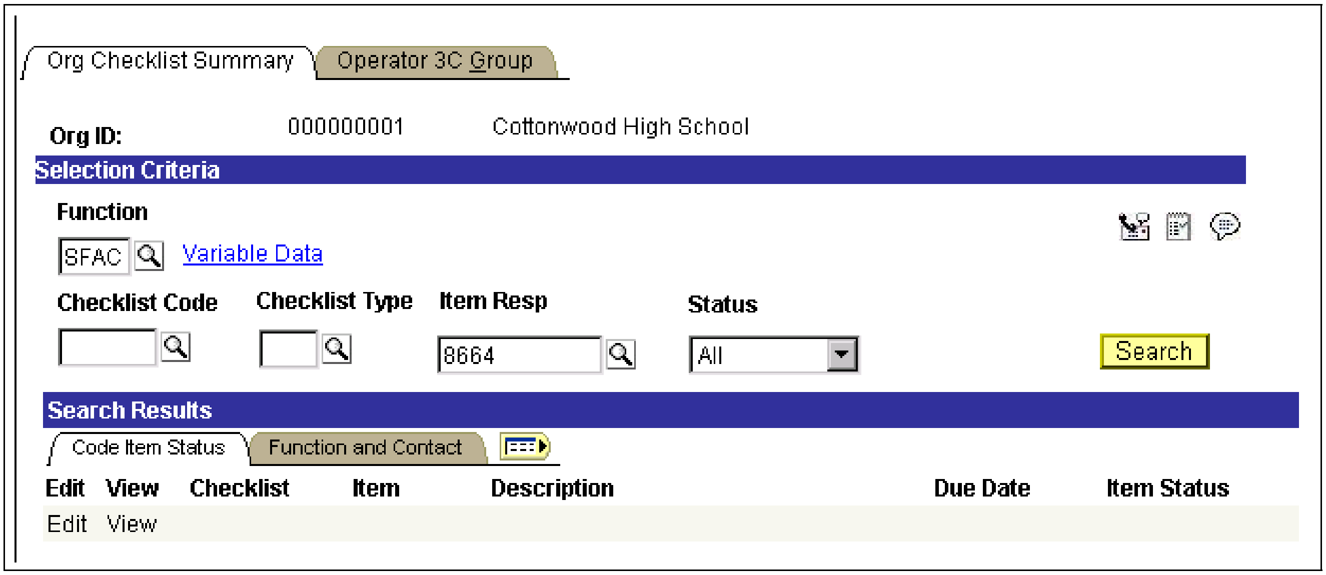
The Organization Checklist Detail 1 and 2 pages are view-only versions of the Organization Checklist Management 1 and 2 pages where you assign checklist items to the organization. You cannot enter or edit data here.

See Also

Chapter 28, "Managing Checklists," Assigning Checklists to Organizations, page 329

Viewing a Summary of Checklist Item Status for an Organization

Access the Organization Checklist Summary page.



Organization Checklist Summary page: Code Item Status tab

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.

Common Page Information

If you click the Search button without entering any values, the system searches for all checklists for this organization and displays the results at the bottom of the page. You can enter a value or any combination of values to limit the search.

Function — The administrative area on which you want to search.

Variable Data — Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

See Chapter 28, "Managing Checklists," Assigning a Checklist to an Organization, page 330.

Checklist Code — The checklist on which you want to search. The available checklists are from the Checklists page.

Checklist Type — The type of checklist (*Condition List, Communication List, Requirements List,* and so on) for which you want to search.

Responsible ID — The ID of the individual who is associated with, or responsible for, the checklists items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status — The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Search
Click this button to launch the search based on the selected criteria.


Click the Communication button to transfer to the Organization Communication 1 page, where you can add a new communication for this organization.


Click the Checklist button to transfer to the Assigning a Checklist to an Organization, where you can add a new checklist for this organization.


Click the Comment button to transfer to the Organizational Comment Entry page, where you can enter a new comment for this organization.

Code Item Status Tab

Edit
Click this link to access the Checklist Management 1 page, where you can edit the checklist.

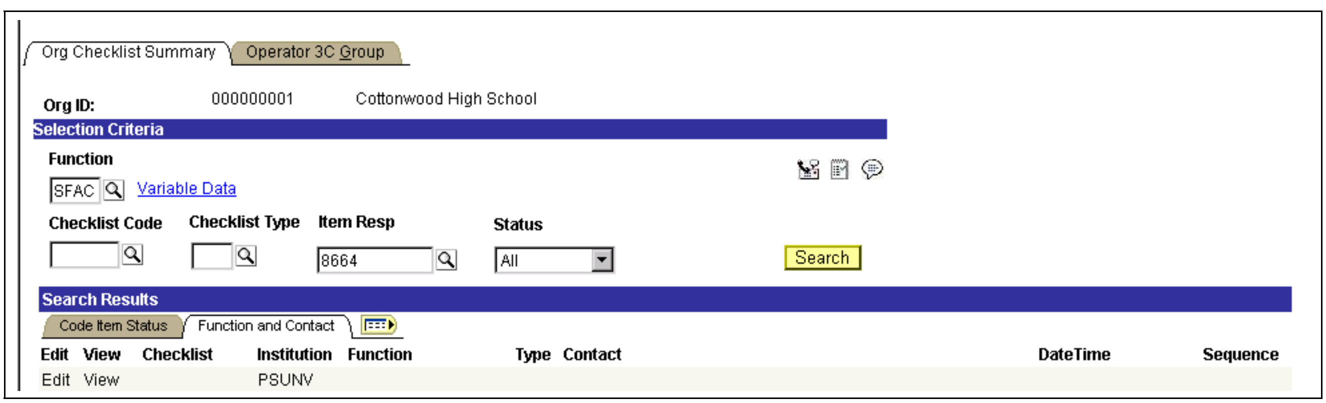
The Edit link is available only if the user has 3C group update access for this checklist code.

View
Click this link to access the Checklist Management 1 page, where you can view the checklist.

The View link is available only if the user has 3C group inquiry access for this checklist code.

Function and Contact Tab

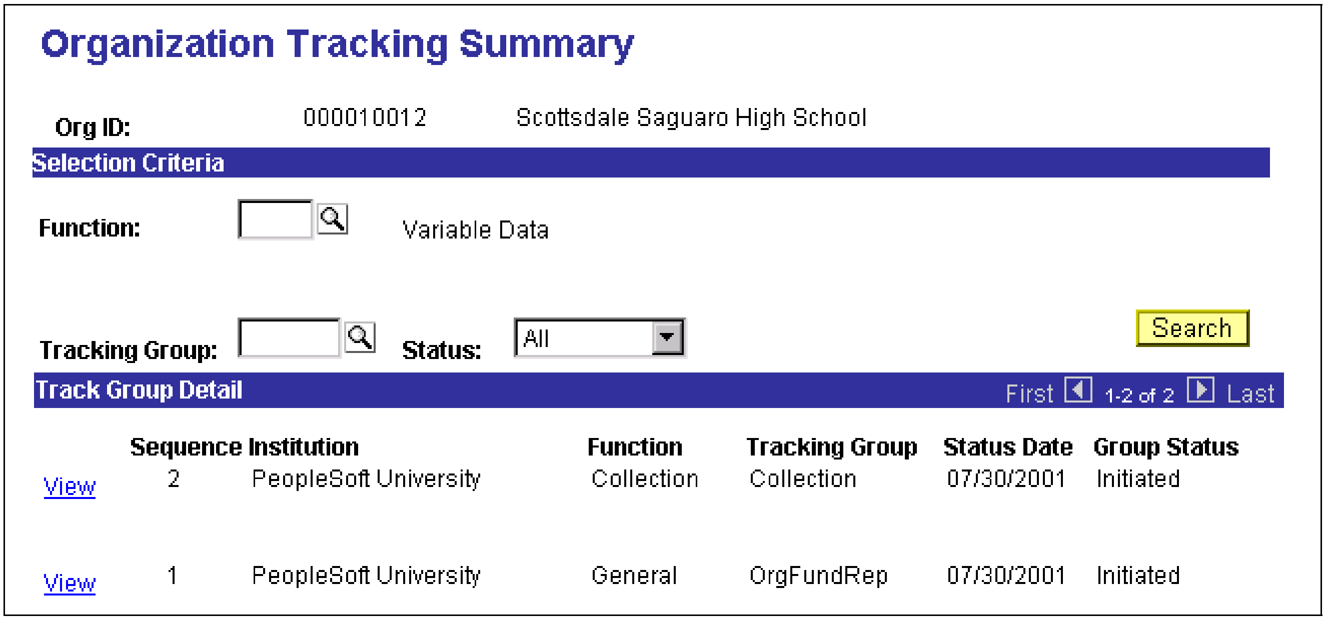
Use the Function and Contact tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the contact person for the checklist item.



Organization Checklists Summary page: Function and Contact tab

Viewing a Summary of Tracking Groups for an Organization

Access the Organization Tracking Summary page.



Organization Tracking Summary page

Selection Criteria

If you click the Search button without entering any values, the system will search for all tracking groups that include this individual and display the results at the bottom of the page. You can enter a value or any combination of values to limit your search.

Function The administrative area on which to search.

Variable Data Click to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Tracking Group The tracking group on which to search.

Status The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

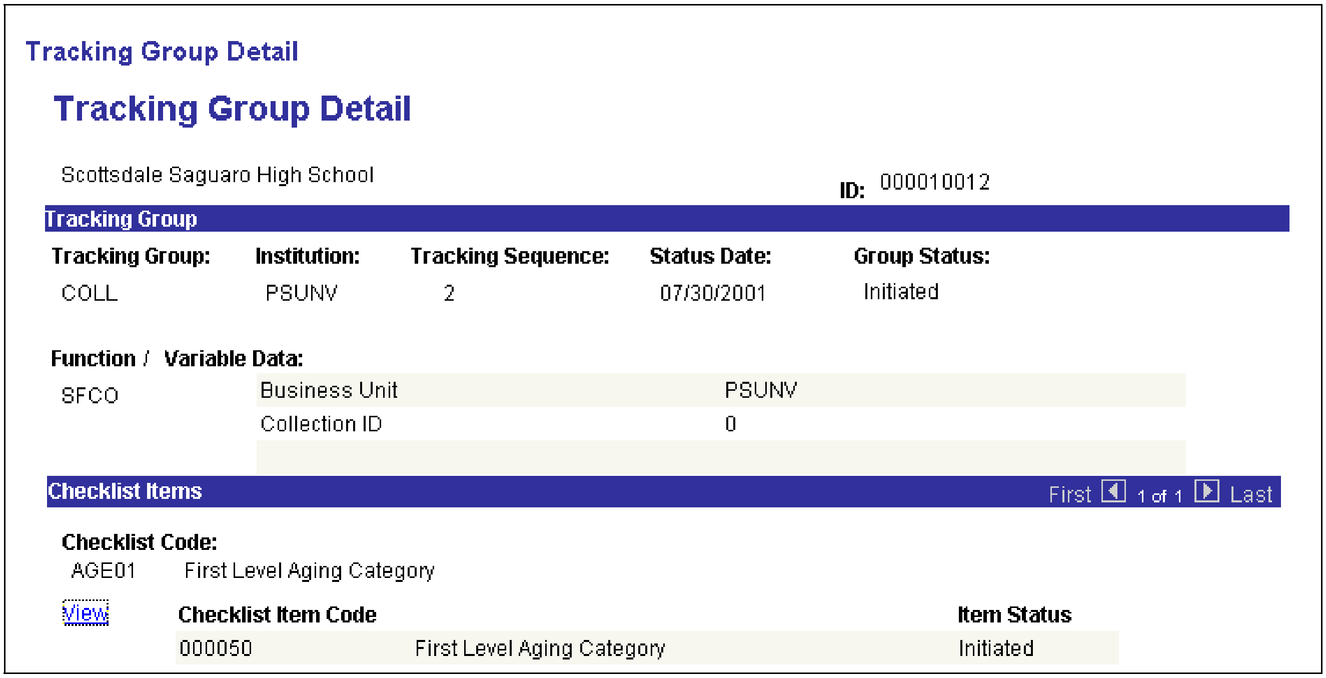
Track Group Detail

View Click to access the Tracking Group Detail page where you can view the checklist.

The View link is available only if the user has 3C group inquiry access for this checklist code.

Viewing a Summary of Checklists in a Tracking Group for an Organization

Access the Tracking Group Detail page.



Tracking Group Detail page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Checklists for Events

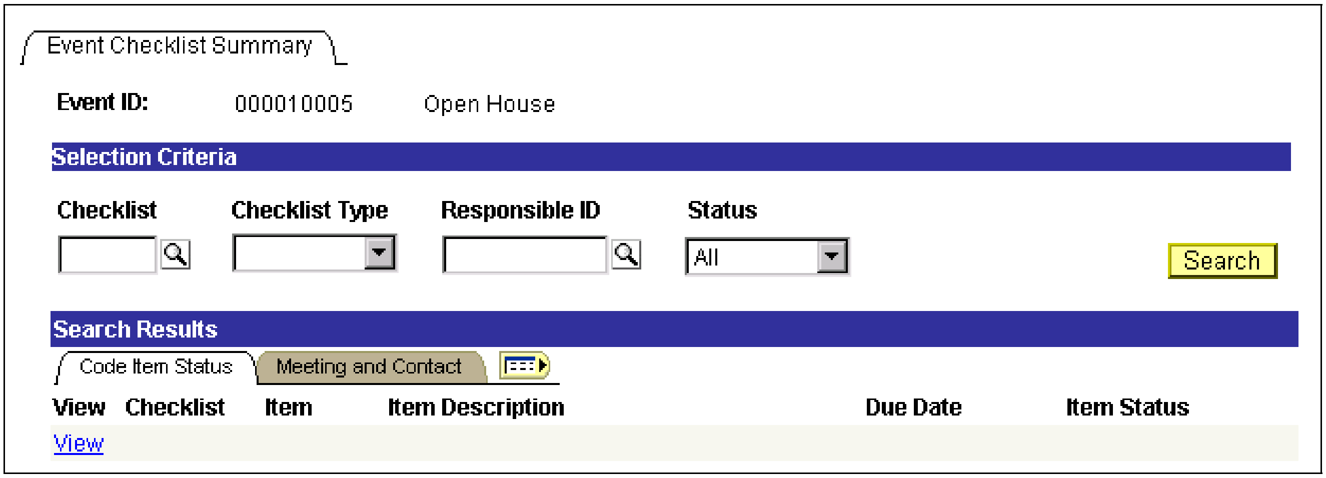
This section discusses how to view all checklist items assigned to an event.

Page Used to Review Checklists for Events

Page Name	Object Name	Navigation	Usage
Event Checklist Summary	EVENT_CHKLST_SUMM	Build Community, Checklists, Inquire, Event Checklist Summary, Event Checklist Summary	Review all of the checklist items assigned to an event.

Viewing All Checklist Items Assigned to an Event

Access the Event Checklist Summary page.



Event Checklist Summary page: Code Item Status tab

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.

Common Page Information

If you click the Search button without entering any values, the system will search for all checklists for this organization and display the results at the bottom of the page. You can enter a value or any combination of values to limit the search.

Checklist

The checklist on which to search. The available checklists are from the Checklists page.

Checklist Type

The type of checklist (for example, *Condition List, Communication List,* or *Requirements List*) for which you want to search.

Responsible ID

The ID of the individual who is associated with, or responsible for, the checklists items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status

The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Search

Click this button to launch the search based on the selected criteria.

Code Item Status Tab

View

Click to access the Event Checklist Management 1 page where you can view the checklist.

The View link is available only if the user has 3C group inquiry access for this checklist code.

Meeting and Contact Tab

Use the Meeting and Contact tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the contact person for the checklist item.

CHAPTER 29

Managing Identification Data

This chapter provides an overview of how to maintain identification data for individuals and discusses how to:

- Enter driver's license data.
- Enter photographs.
- Enter residency data.
- Enter citizenship/passport data.
- Enter visa and permit data.

Understanding Identification Data

You can scan photos and enter driver's license data in your database to help you identify and recognize individuals at your institution.

Your institution might require an individual's driver's license number and the state where issued. Your institution might also want to know if the driver's license is valid and how many violations and points are on driver's record. Driver's license and driver's record information might be considered when issuing parking permits, granting usage of departmental vehicles, or maintaining carpools.

You can upload photos to your database to help identify individuals. Use your institution's image importing method to place the image in a file on your computer and save it in jpeg format. Then, using the Photo page you can upload that image to the individual's record in your database.

You can track the official and self-reported residency of individuals at your institution. You can also enter data for residency appeals.

Using the Citizenship/Passport Data pages, you can enter multiple countries of citizenship and multiple passports for individuals.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Personal Portfolio Collaborative Application you can use the self-service pages described here.

See Chapter 40, "Using PeopleSoft Personal Portfolio Collaborative Application," Exposing Self-Service Participation Data, page 520.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Introducing Collaborative Applications"

Chapter 40, "Using PeopleSoft Personal Portfolio Collaborative Application," Exposing Self-Service Identification Data, page 519

Entering Driver's License Data

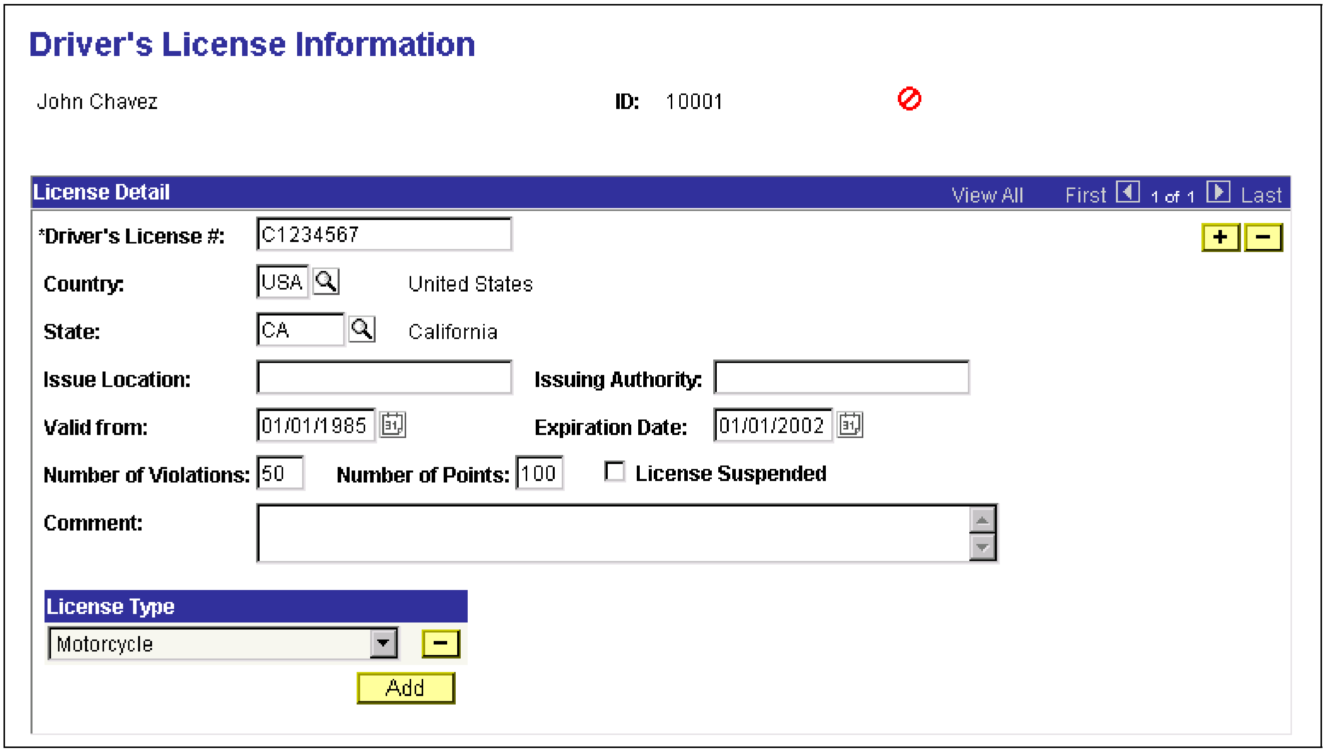
This section discusses how to enter driver's license data.

Page Used to Enter Driver's License Data

Page Name	Object Name	Navigation	Usage
Driver's License Information	DRIVERS_LIC_SA	• Build Community, Identification Data, Use, Driver's License Data, Driver's License • Administer Financial Aid, Apply for Financial Aid, Use, Driver's License Data, Driver's License	Enter license numbers and driving record information.

Entering Driver's License Data

Access the Driver's License Information page.



Driver's License Data page

Driver's License # The number from the individual's official driver's license.

Country The country in which the license was issued.

State The state in which the license was issued.

Issue Location The location where the license was issued. This can be the street address, the city, the county, or whatever your institution decides.

Issuing Authority The authority or agency that issued the license. This can be the name of the motor vehicle agency or whatever your institution decides.

Valid from The date that the license became effective, usually the issuing date.

Expiration Date The date the license expires.

Valid from/to The dates for which the license is valid, usually the issuing date and the expiration date.

Number of Violations The number of traffic violations on record for this individual.

Number of Points The number of points on record for this individual.

License Suspended When selected, indicates that this individual's driver's license is currently suspended.

Comment Comments to further identify or describe this individual's driver's license or driver's record.

License Type The types of driver's licenses *(Chauffeur, Class C, Motorcycle* or *Truck)* issued to this individual under the specified license number. Add a new license if the license number is different.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Entering Photos

This section discusses how to enter a photograph onto your database.

Prerequisites

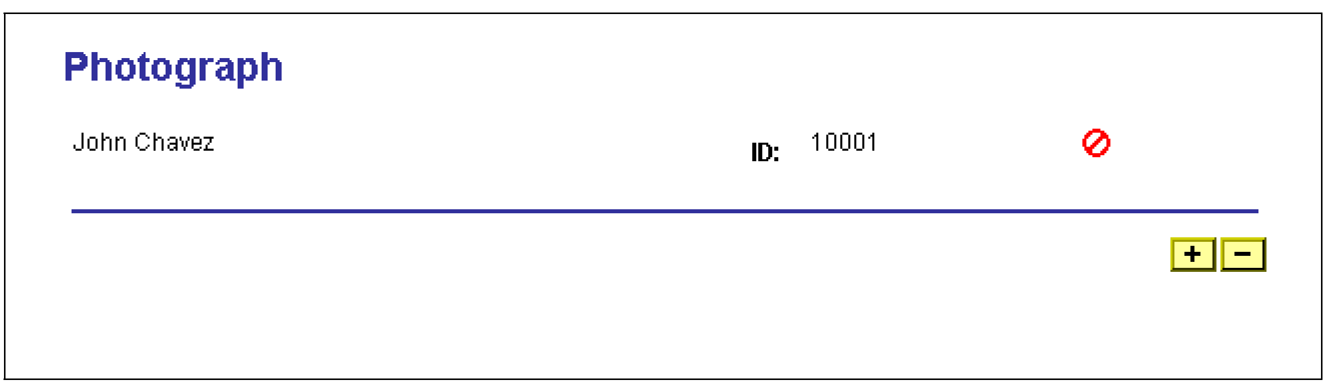
Before you can enter a photograph into your database, you must scan or digitally load the photo onto your computer and save it in jpeg format. Consult your platform manufacturer's manuals for information about imaging for the particular database platform that you are using.

Page Used to Enter Photographs

Page Name	Object Name	Navigation	Usage
Photograph	PHOTO_PERS	• Build Community, Identification Data, Use, Photo, Photo • Manage Contributor Relations, Manage People, Use, Photo, Photo • Manage Student Records, Manage Academic Records, Inquire, Student Photo, Student Photo	Enter a photo of an individual to your system.

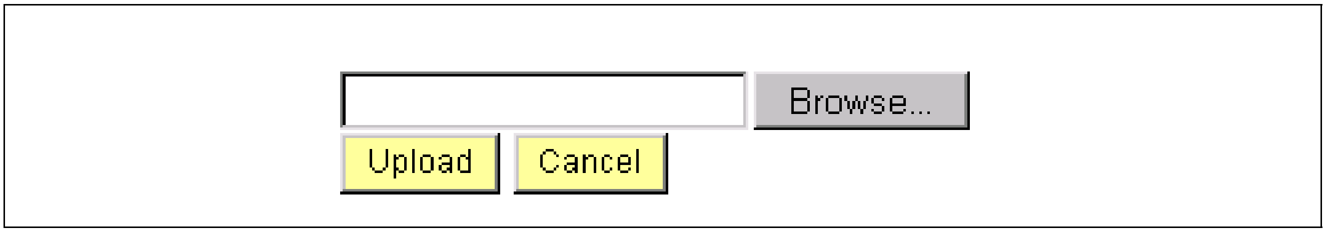
Entering a Photograph

Access the Photograph page.



Photograph page

To insert an image, click the "plus" button to add a row on the Photo page. The following page appears.



Uploading a photo to the Photo page

Browse to, or enter the path to the .jpg image of the individual on your computer. Click Upload. After the photo loads, save the page.

Entering Residency Data

This section gives an overview of entering residency data for individuals and discusses how to:

- Enter official residency data.
- Enter self-reported residency data.
- Enter residency appeal information.

Understanding Residency Data

Using the Resident Table page, set up codes to represent the residency rules of your institution. For example, your institution might require residency codes for residency that is in state, out of state, in district, out of district, and so on. On the Residency Exception Table page, set up exceptions to the residency rules. For example, an individual may be exempt from nonresidency requirements because he or she is in the military. Exceptions are especially useful in tuition calculation.

After you set up residency codes and residency exception codes, use the Official Residency 1 and 2 pages to record residency information that your institution has verified, including the individual's in- or out-of-state residency for a specific term. You can enter unofficial, self-reported residency information on the Residency Self-Report page.

When an individual appeals residency information, you can enter on the Residency Appeal page, the date of, status of, and comments about the appeal.

Prerequisites

Before entering residency data, define residency rules.

See Also

Chapter 8, "Setting Up Identification Data," Setting Up Residency Rules, page 76

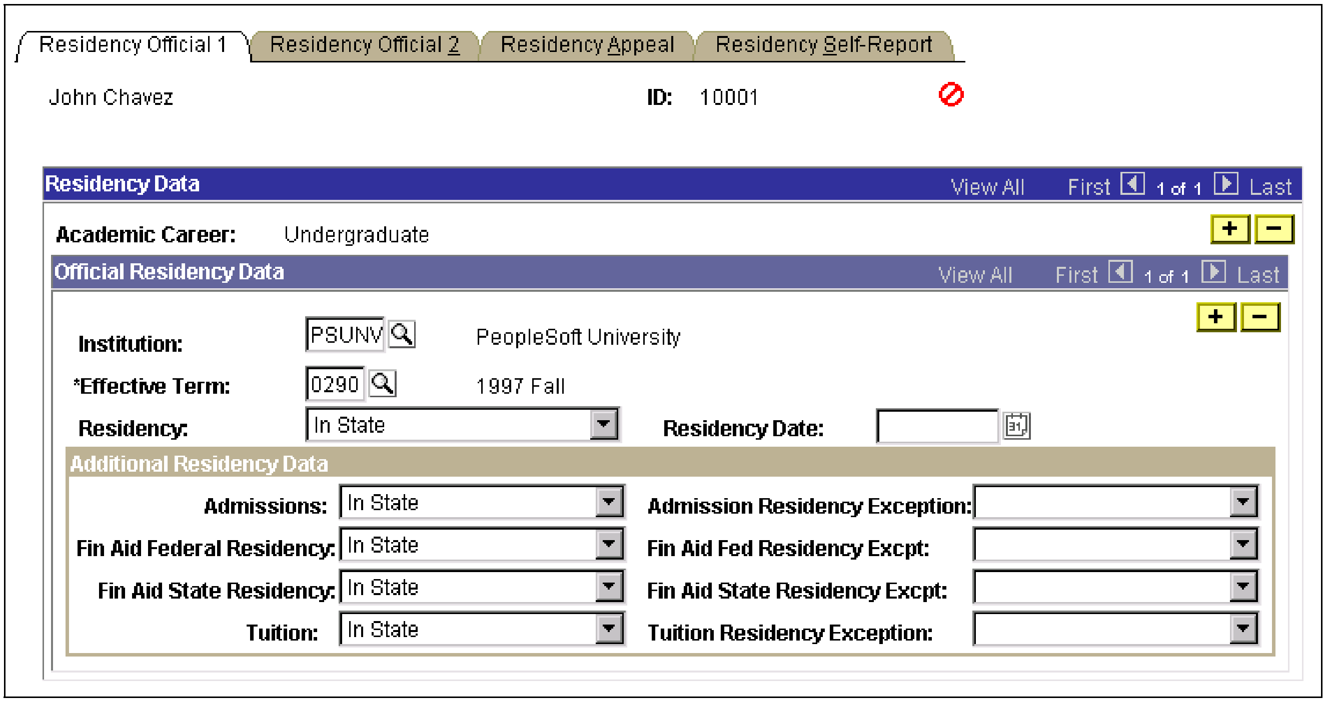
Pages Used to Enter Residency Data

Page Name	Object Name	Navigation	Usage
Residency Official 1	RESID_OFFICIAL1	• Build Community, Identification Data, Use, Residency Data, Residency Official 1 • Manage Student Financials, Maintain Customers, Use, Residency Data, Residency Official 1 • Develop Enrollment, Process Applications, Use, Residency Data, Residency Official 1 • Develop Enrollment, Recruit Prospective Students, Use, Residency Data, Residency Official 1	Enter official residency data for an individual.
Residency Official 2	RESID_OFFICIAL2	• Build Community, Identification Data, Use, Residency Data, Residency Official 2 • Manage Student Financials, Maintain Customers, Use, Residency Data, Residency Official 2 • Develop Enrollment, Process Applications, Use, Residency Data, Residency Official 2 • Develop Enrollment, Recruit Prospective Students, Use, Residency Data, Residency Official 2	Enter additional official residency data for an individual.

Page Name	Object Name	Navigation	Usage
Residency Self-Report	RESIDENCY_SELF	• Build Community, Identification Data, Use, Residency Data, Residency Self-Report • Administer Financial Aid, Apply for Financial Aid, Use, Residency Data, Residency Self-Report • Manage Student Financials, Maintain Customers, Use, Residency Data, Residency Self-Report • Develop Enrollment, Process Applications, Use, Residency Data, Residency Self-Report • Develop Enrollment, Recruit Prospective Students, Use, Residency Data, Residency Self-Report	Enter unofficial, unverified residency information that an individual reports to your institution.
Residency Appeal	RESIDENCY_APPEAL	• Build Community, Identification Data, Use, Residency Data, Residency Appeal • Manage Student Financials, Maintain Customers, Use, Residency Data, Residency Appeal • Develop Enrollment, Process Applications, Use, Residency Data, Residency Appeal • Develop Enrollment, Recruit Prospective Students, Use, Residency Data, Residency Appeal	Record residency appeal information.

Entering Official Residency Data

Access the Residency Official 1 page.



Residency Official 1 page

Official Residency Data

Effective Term The term for which the residency data is effective for the individual.

Residency Select the rule that describes the individual's residency status (from the Residency Table page).

Residency Date Enter the date that the individual established or reported the residency.

Additional Residency Data

Admissions Specify the type of residency that qualifies the individual for admission to the specified institution.

Fin Aid Federal Residency Specify the type of residency that qualifies the individual to receive financial aid from the federal government.

Fin Aid State Residency Specify the type of residency that qualifies the individual to receive financial aid from the state.

Tuition Specify the type of residency that qualifies the individual for tuition assistance.

Admission Residency Exception Specify the exception from your institution's residency rule for admissions (from the Residency Exception Table page) that applies to the individual.

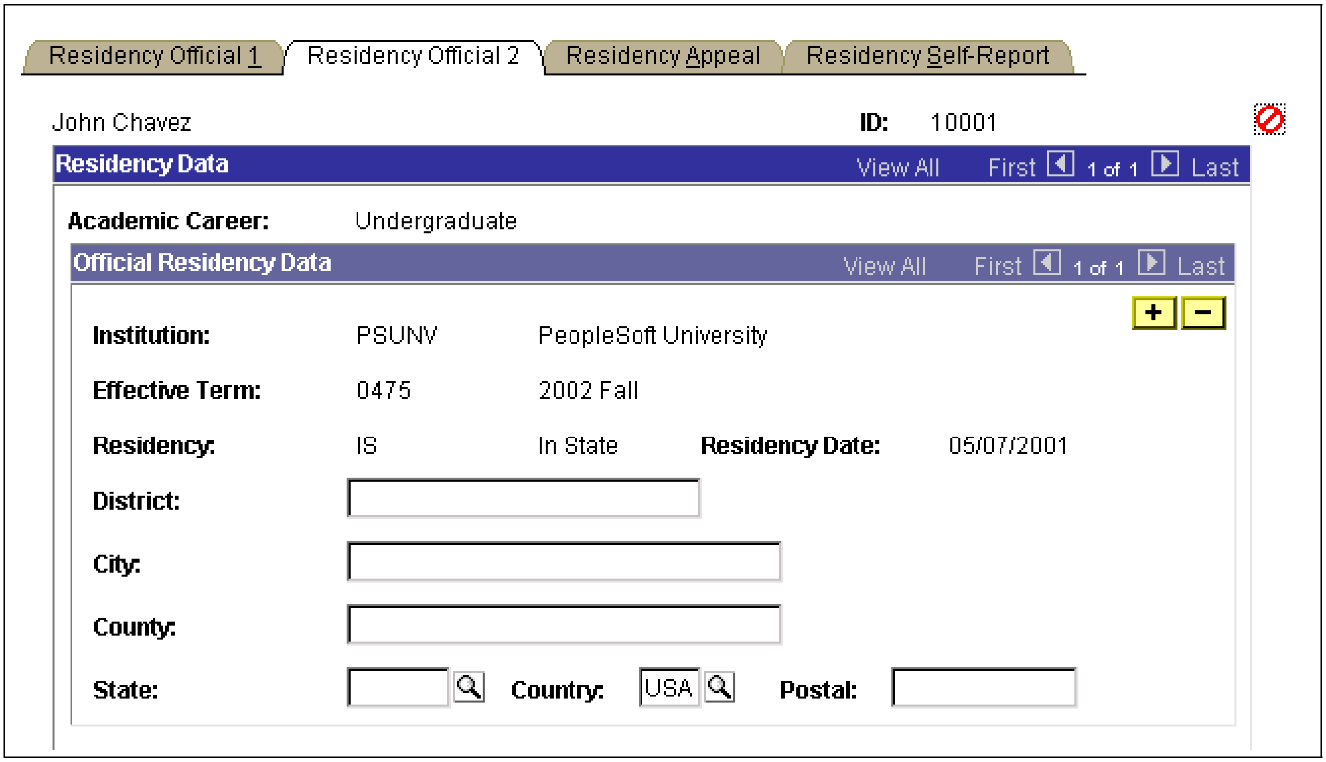
Fin Aid Fed Residency Exception Specify the exception from the federal residency rule for financial aid, (from the Residency Exception Table page) that applies to the individual.

Fin Aid St Residency Exception Specify the exception from the state residency rule for financial aid (from the Residency Exception Table page) that applies to the individual.

Tuition Residency Exception Specify the exception from your institution's residency rule for tuition (from the Residency Exception Table page) that applies to the individual.

Entering Official Residency Location Details

Access the Residency Official 2 page

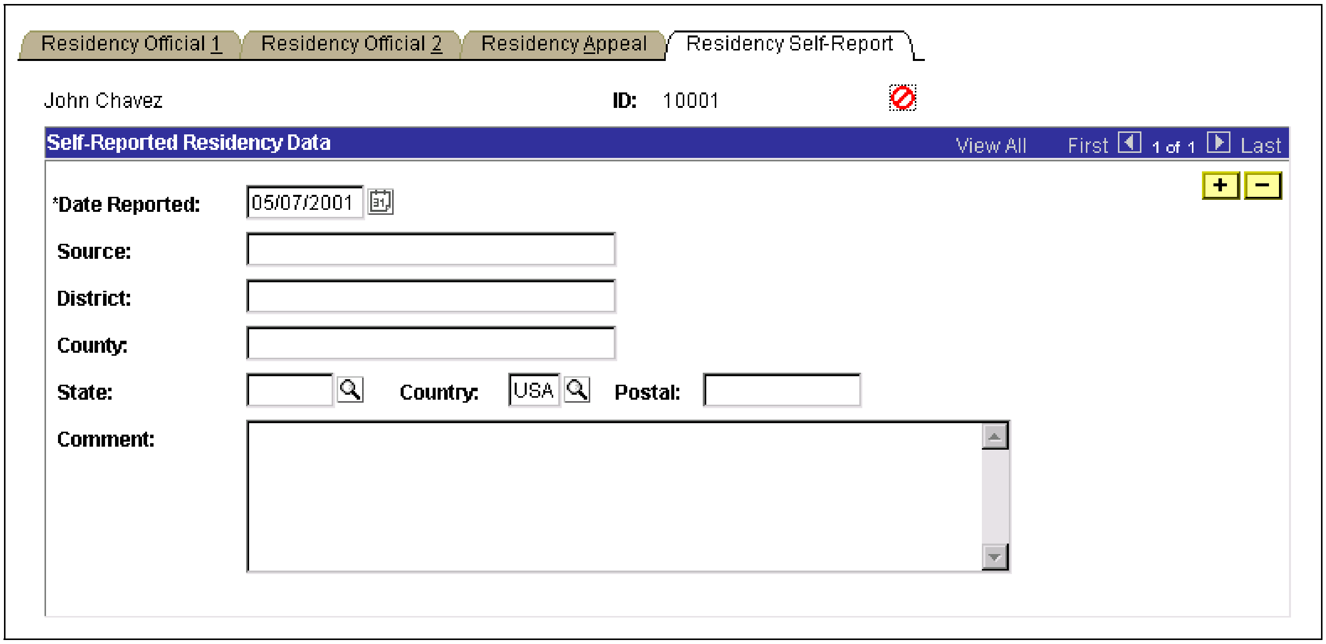


Residency Official 2 page

Enter location details of the residency data for this individual.

Entering Self-Reported Residency Data

Access the Residency Self-Report page.



Residency Self-Report page

Date Reported

Enter the date that this residency information is reported to your institution. The default date is the system's current date. You can override the default date.

Source

Enter a description of the source of this residency information. This can be an individual's name, the method of reporting (letter, email, telephone conversation, and so on), or the title of a document that you have chosen to use.

District, County, State, Country, Postal

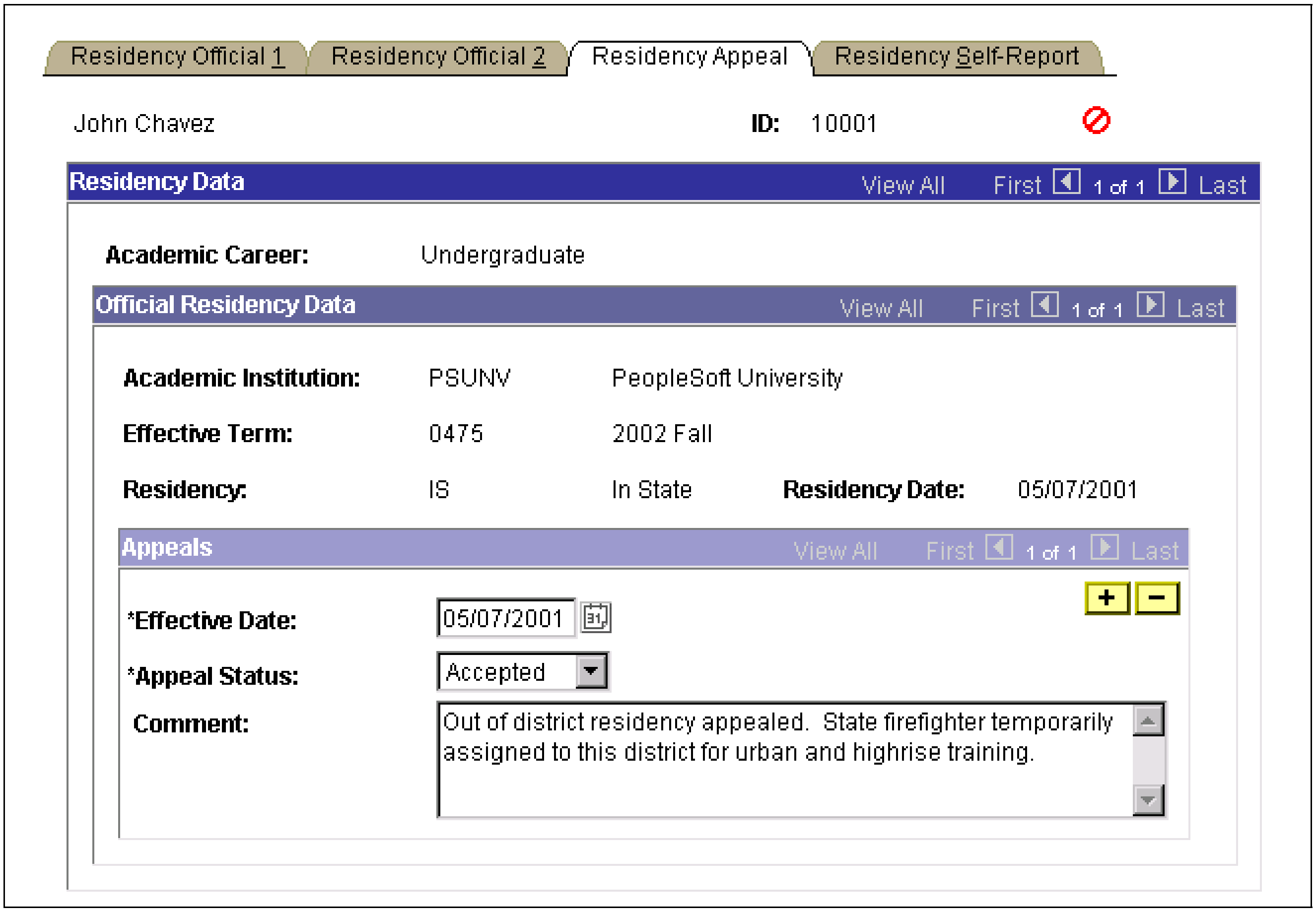
Enter location details for this residency.

Comment

Enter comments to further describe this residency information or further identify the source of the information.

Entering Residency Appeal Data

Access the Residency Appeal page.



Residency Appeal page

Appeals

Effective Date Enter the effective date of the status of this appeal. The default effective date is the system's current date. You can override this date.

Appeal Status Select the current status of this appeal: *Accepted, Denied, InProgress, None,* or *Suspended.*

Values for this field are delivered with your system as translate values. You can modify these translate values.

Comment Enter comments to further describe or identify the nature of this appeal.

Entering Citizenship and Passport Data

This section provides and overview of citizenship and passport data discusses how to enter that data.

Understanding Citizenship and Passport Data

An important component of the data that you must track for students or employees who travel internationally to or from your institution is passport and citizenship information. Using the Citizenship/Passport Data pages, you can enter multiple countries of citizenship and multiple passports for individuals.

Using the country codes and citizen status codes in your system, you can identify an individual's country of citizenship, the current status of that citizenship, when citizenship was issued, and when citizenship expires.

Prerequisites

Before entering citizenship and passport data for an individual, you must define levels of citizenship status for each country.

See Also

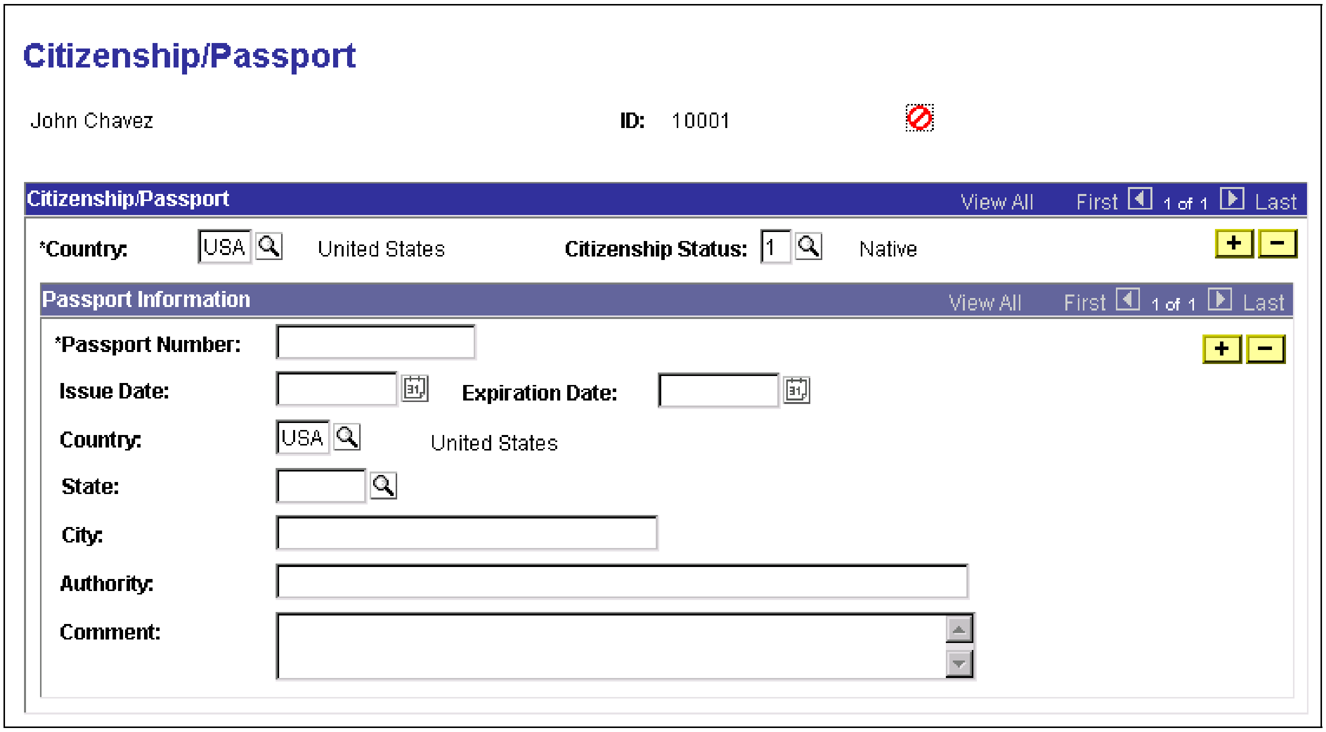
Chapter 8, "Setting Up Identification Data," Setting Up Citizenship and Passport Data, page 78

Page Used to Enter Citizenship and Passport Data

Page Name	Object Name	Navigation	Usage
Citizenship/Passport	LS_CITIZEN_PASSPRT	Build Community, Identification Data, Use, Citizenship and Passport Data, Citizenship/Passport	Enter citizenship and passport data for an individual.

Entering Citizenship and Passport Data

Access the Citizenship/Passport page.



Citizenship/Passport page

Citizenship/Passport

Country Specify the country of the individual's citizenship.

Citizenship Status Specify the status (for example, *Native, Naturalized,* or *Alien Permanent*) of this individual's citizenship in the specified country. These status values are from the Citizen Status Table page.

Passport Information

Passport Number Enter the number from the individual's official passport.

Issue Date Enter the official issuance date stamped on the passport.

Expiration Date Enter the official expiration date stamped on the passport.

Country Specify the country where the passport was issued.

Additional location fields appear based on the country that you select, so that you can provide additional location details, for example City and State or Province.

Authority Enter the name of the agency or authority that issued the passport.

Comment Enter comments to further describe the individual's citizenship, passport, or nature of the issuance of the passport.

Entering Visa and Permit Data

This section gives an overview of visa and permit data, and discusses how to:

- Enter visa and permit data for an individual.
- Prepare visa forms.

Understanding Visa and Permit Data

If your institution admits foreign students or hires individuals who are not citizens of the same country where your institution is, you should set up codes classifying the types of visas and permits required by the appropriate governments.

Using the Supporting Document Table page, you can set up document codes to identify birth certificates, letters of employment, immigration application letters, and other documents required to obtain I-9 verification for individuals attending your institution.

Note. If you use PeopleSoft HRMS, many supporting document IDs and visa and permit types may already exist in your system.

Each country has its own regulations for permitting foreign employees to work, visit, or reside there. To track information on the visas and permits required in order for individuals to work at, visit, or attend your institution, use the Visa/Permit Data page.

You can also use your system to prepare visa forms. You can enter data for IAP66 forms for international applicants, students, professors, and visitors who need a J1 Visa. You can also prepare and print (JetForm) I20 forms for international students who are admitted to or currently enrolled in your institution and who need an F1 Student Visa.

Prerequisites

Before entering visa and permit data, define visas and permit codes.

See Also

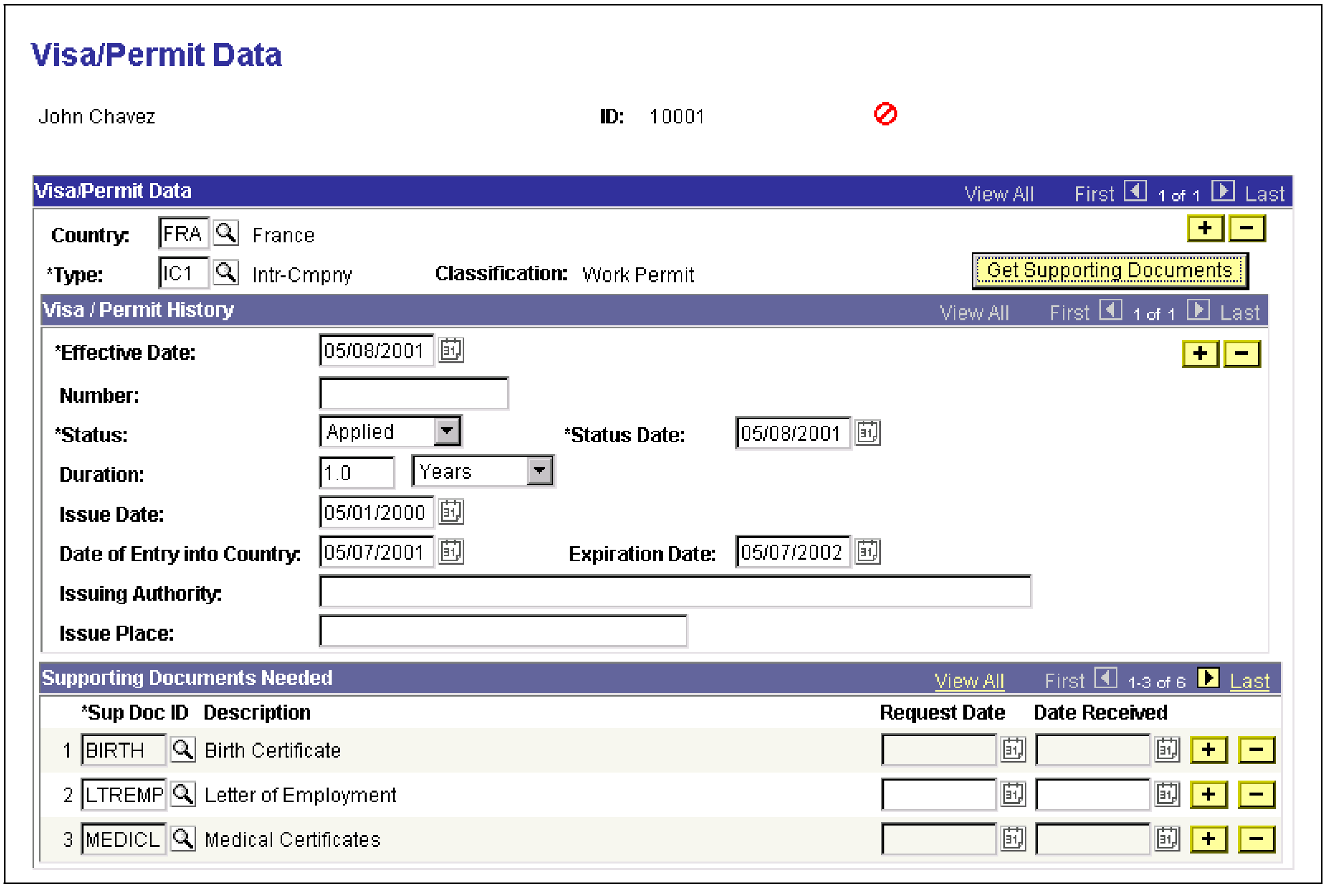
Chapter 8, “Setting Up Identification Data,” Setting Up Visa and Permit Data, page 73

Pages Used to Enter Visa and Permit Data

Page Name	Object Name	Navigation	Usage
Visa/Permit	LS_VISA_PERMIT	• Build Community, Identification Data, Use, Visa Permit Data, Visa/Permit Data • Administer Financial Aid, Apply for Financial Aid, Use, Visa/Permit Data, Visa/Permit Data	Enter and track an individual's visa and permit information.
IAP66	IAP66_FORM1	Build Community, Identification Data, Use, IAP66 Form	Enter data for preparing IAP66 forms for an international applicant, student, professor, or visitor who needs a J1 Visa
I20	I20_FORM1	Build Community, Identification Data, Use, I20 Form	Enter data for preparing I20 forms for an international student who is admitted to or currently enrolled in your institution and who needs an F1 visa.

Entering Visa and Permit Data

Access the Visa/Permit Data page.



Visa/Permit Data page

Note. You can also enter visa and permit information from the Bio/Demo Data page when you click the Visa/Permit Data button.

Visa/Permit History

Country Specify the issuing country for the individual's visa or permit.

Type Select the type of visa or permit, from the Visa/Permit Table page. The types available are based on the country specified.

Classification Indicates the classification based on the type of visa or permit selected.

Effective Date Enter the date when the visa or permit is effective or the date when the information should become effective in your database.

Number Enter the issuance number from the individual's official visa or permit.

Status The status *(Applied, Granted, Renewal,* or *Renewed)* of the official visa or permit.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status Date Enter the date of the status. The default status date is the system's current date. You can override this date.

Duration Specify the length of time during which the visa or permit is valid. Enter the number in the first field and specify the period, *Days, Months, Terms,* or *Years* in the second field.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Issue Date Enter the date of issuance from the individual's official visa or permit.

Date of Entry into Country Enter the official date when the individual entered your institution's country.

Expiration Date Enter the date when this individual's visa or permit will expire. The system calculates the expiration date based on the specified duration and the date of entry into the country. You can override the system-calculated date.

Issuing Authority Enter the name of the agency or authority that issued the official visa or permit.

Issue Place Enter the name of the location where the official visa or permit was issued.

Supporting Documents Needed

Supporting Document ID Select the supporting documents required for this type of visa or permit.

Get Supporting Documents Click to cause the system to retrieve the supporting document IDs and descriptions from the Visa/Permit Table page for this visa or permit type.

Request Date Enter the date when your institution requests the supporting document.

Date Received Enter the date when your institution receives the supporting document.

Preparing IAP66 Forms for J1 Visas

Use the IAP66 pages to enter data for preparing IAP66 forms for an international applicant, student, professor, or visitor who needs a J1 Visa.

Preparing I20 Forms for F1 Visas

Use the I20 pages to enter data for preparing and printing (JetForm) an I20 form for an international student who is admitted to or currently enrolled in your institution and who needs an F1 Student Visa.

CHAPTER 30

Managing Participation Data

This chapter gives an overview of participation data, and discusses how to:

- Enter athletic participation data.
- Enter extracurricular activities data.
- Enter honors and awards data.
- Enter licenses and certificates data.
- Enter memberships data.
- Enter publications data.

Understanding Participation Data

You can enter information in your database to indicate the types of accomplishments and associations achieved by individuals at your institution. You can enter data about their athletic participation, extracurricular activities, the licenses and certificates that they hold, the honors and awards that they receive, and the articles or books they have published.

You can use the codes in your system to identify athletes at your institution and track their athletic participation and eligibility. Some codes for levels of involvement are delivered with your system. You can create additional codes to identify the levels of involvement in athletic teams and events at your institution.

You can also enter data about the books and articles that individuals at your institution have published.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Personal Portfolio Collaborative Application you can use the self-service pages described here.

See Chapter 40, “Using PeopleSoft Personal Portfolio Collaborative Application,” Exposing Self-Service Participation Data, page 520.

Entering Athletic Participation Data

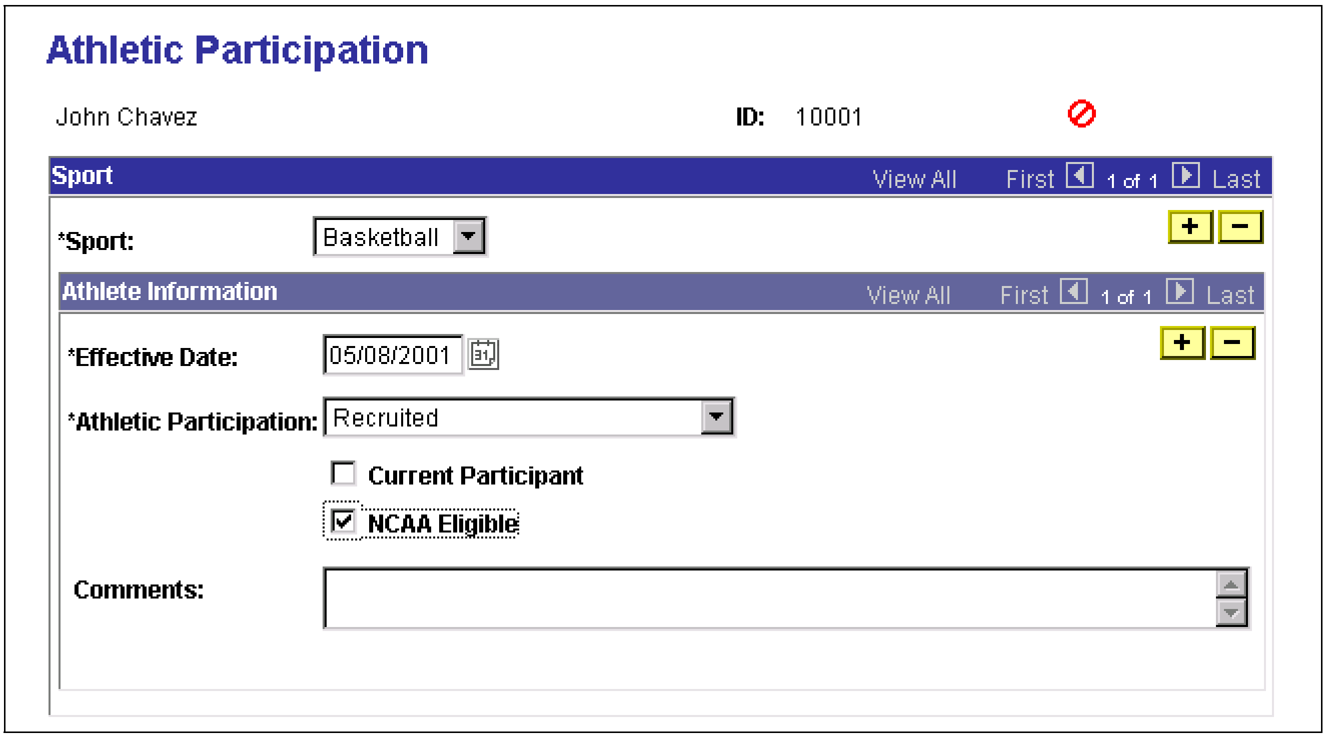
This section discusses how to enter athletic participation data.

Page Used to Enter Athletic Participation Data

Page Name	Object Name	Navigation	Usage
Athletic Participation	ATHLETES	Build Community, Participation Data, Use, Athletic Participation, People Athletes	Enter athletic participation data to help track an individual's participation at your institution.

Entering Athletic Participation Data

Access the Athletic Participation page.



Athletic Participation page

Sport

Select the sport in which this individual participates.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Athletic Participation

Indicate the level or status of the individual's participation in the specified sport, for example *Active Participant, Manager, Not Recruited,* or *Recruited.*

Current Participant

Select to indicate that this individual currently participates in this sport.

NCAA Eligible

Select to indicate that the individual is eligible to participate on a NCAA (National Collegiate Athletic Association) team for this sport.

Comments

Enter comments to further identify or describe the individual's level or status of participation in the specified sport.

Entering Extracurricular Activities Data

You can use the codes in your system to identify extracurricular activities and track participation in them. Some codes for levels of involvement are delivered with your system. You can create additional codes to identify the levels of involvement in athletic teams and events.

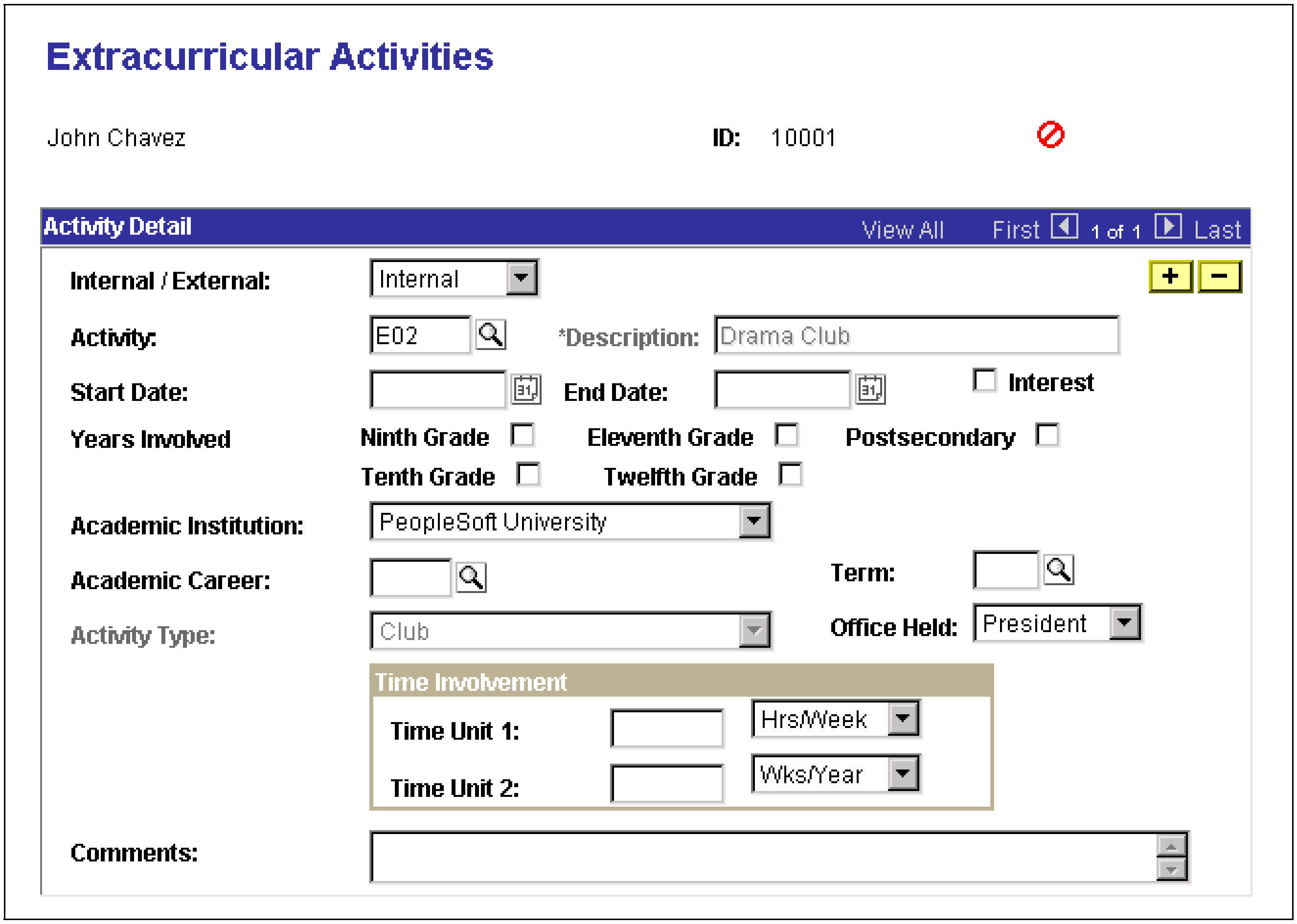
This section discusses how to enter extracurricular activities data.

Page Used to Enter Extracurricular Activities Data

Page Name	Object Name	Navigation	Usage
Extracurricular Activities	LS_EXTRA_ACTVTY	• Build Community, Participation Data, Use, Extracurricular Activities, Extracurricular Activity • Develop Enrollment, Manage Recruiters, Use, Extracurricular Activities, Extracurricular Activity • Develop Enrollment, Process Applications, Use, Extracurricular Activities, Extracurricular Activities • Develop Enrollment, Recruit Prospective Students, Use, Extracurricular Activities, Extracurricular Activities • Manage Student Records, Track Student Careers, Use, Extracurricular Activity, Extracurricular Activity	Enter extracurricular activities data to track internal or external student activities for an individual.

Entering Extracurricular Activities Data

Access the Extracurricular Activities page.



Extracurricular Activities page

Internal/External

Specify whether the activity in which the individual participates, is within or outside of your institution.

Activity

Select the activity code, from the Extracurricular Activities Table page, which represents the activity in which the individual participates.

Description

The system displays the description associated with the specific activity code on the Extracurricular Activities Table page.

Note. You can manually enter an activity description without selecting a code. However, to be sure that the activity will be included in FERPA and other processes that depend on the codes, you should consider setting up the activity on the Extracurricular Activities Table page.

Start Date

Enter the date when the individual's participation in this activity is scheduled to begin. The default start date is the system's current date. You can override this date.

End Date

Enter the date when the individual's participation in this activity is scheduled to end.

Interest	Select to indicate that the individual expresses an interest in participating in this activity while at your institution.
Years Involved	Select the appropriate check boxes *(Ninth Grade, Tenth Grade, Eleventh Grade, Twelfth Grade,* and *Postsecondary)* to indicate the years during which the individual participated in this type of activity.
Academic Institution	The system displays the academic institution of the student, unless the student has more than one, in which case you must select the relevant institution.
Academic Career	The system displays the academic career of the student, unless the student has more than one, in which case you must select the relevant career.
Term	Specify the term during which this individual is scheduled to participate in this activity.
Activity Type	The system displays the activity type associated with the specified activity code on the Extracurricular Activities Table page.
Office Held	Specify the office, if any, that this individual holds in this activity, for example, *Captain, EIC, President, Treasurer,* or *Vice President.* Values for this field are delivered with your system as translate values. You can modify these translate values.
Time Unit 1 and **Time Unit 2**	Indicate the amount of time the individual devotes to this activity. Enter the number in the first field and select a time period in the second field—for example *Days/Month, Hrs/Week,* or *Wks/Year.* (The default value is *Hrs/Week*.) If you specify the number of hours per week in theTime Unit 1 field, you should also specify how many weeks per year in the Time Unit 2 field.
Comments	Enter comments to further identify or describe the individual's participation in this activity.

Entering Honors and Awards Data

You can enter data about the honors and awards received by individuals at your institution.

See *PeopleSoft 8 SP1 Student Records PeopleBook*, "Tracking Student Data," Tracking Honors and Awards.

Entering Licenses and Certificates Data

You can enter data about the credentials and certifications earned by individuals at your institution. You can also indicate if and when the license or certificate requires renewal.

This section discusses how to enter license and certificate data.

See Also

Chapter 29, "Managing Identification Data," Entering Driver's License Data, page 356

Prerequisites

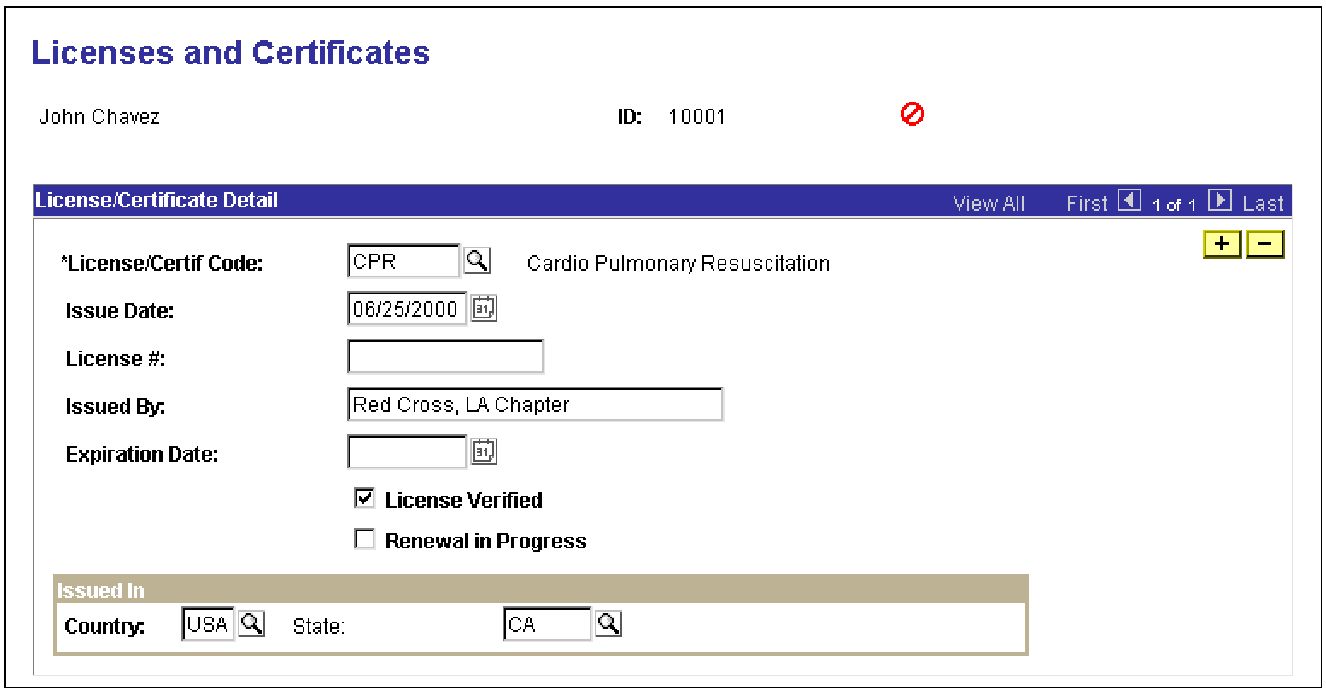
Before entering licenses and certificates data for an individual, define licenses and certificates.

Page Used to Enter License and Certificates Data

Page Name	Object Name	Navigation	Usage
Licenses and Certificates	LICENSE_CERT_PERS	Build Community, Participation Data, Use, Licenses and Certificates, License Cert Pers	Enter license and certificate data to track the permits, licenses, and certifications held by an individual.

Entering Licenses and Certificates Data

Access the Licenses and Certificates page.



Licenses and Certificates page

License/Certificate Code Select the code for the license or certificate to track for the individual.

Issue Date Enter the date when the license or certificate was officially issued.

License # Enter the license number or other unique identification number assigned to the specific license or certificate by the issuing agent.

Issued By Enter the name of the agency or authority who issued the license or certificate.

Expiration Date Enter the date when the license or certificate is scheduled to expire.

License Verified Select to indicate that your institution has verified that this individual holds this license or certificate.

Renewal in Progress Select to indicate that the individual is in the process of renewing this license or certificate.

Country Specify the country in which the license or certificate was issued.

State Specify the state or province in which the license or certificate was issued.

Entering Membership Data

You can select from the organizations in your database to indicate an individual’s association with that organization. If the individual belongs to an organization that is not in your database, you might want to add it on the Membership Table page so that you can track the individuals at your institution who belong to it.

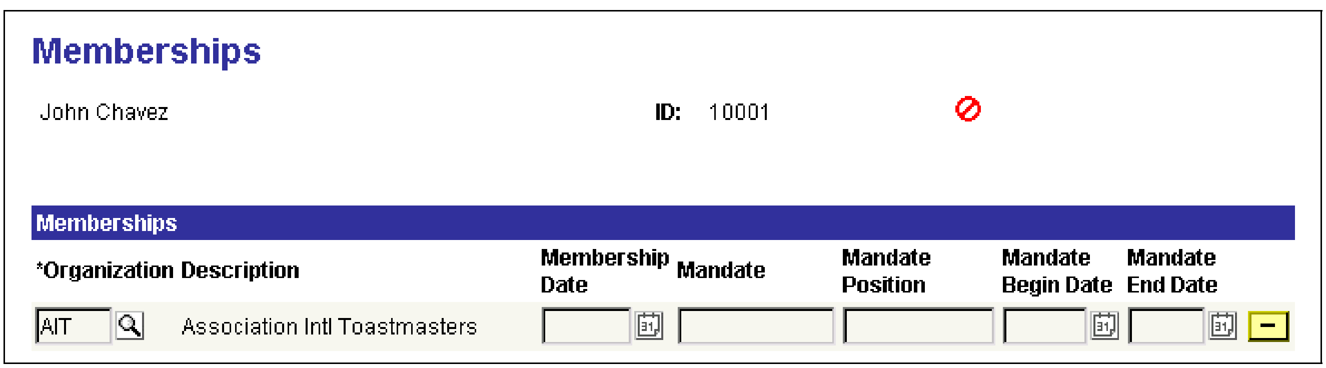
This section discusses how to enter memberships data.

Page Used to Enter Memberships Data

Page Name	Object Name	Navigation	Usage
Memberships	MEMBERSHIPS_PERS	Build Community, Participation Data, Use, Memberships, Memberships Pers	Enter memberships data to identify the organizations of which an individual is a member.

Entering Memberships Data

Access the Memberships Page.



Memberships page

Organization and Description Select the code for the organization of which this individual is a member.

Membership Date Enter the date when the individual’s membership began.

Mandate, Mandate Position, Mandate Begin Date, and **Mandate End Date**	Enter data to describe the organization's mandate or purpose of membership.

Entering Publications Data

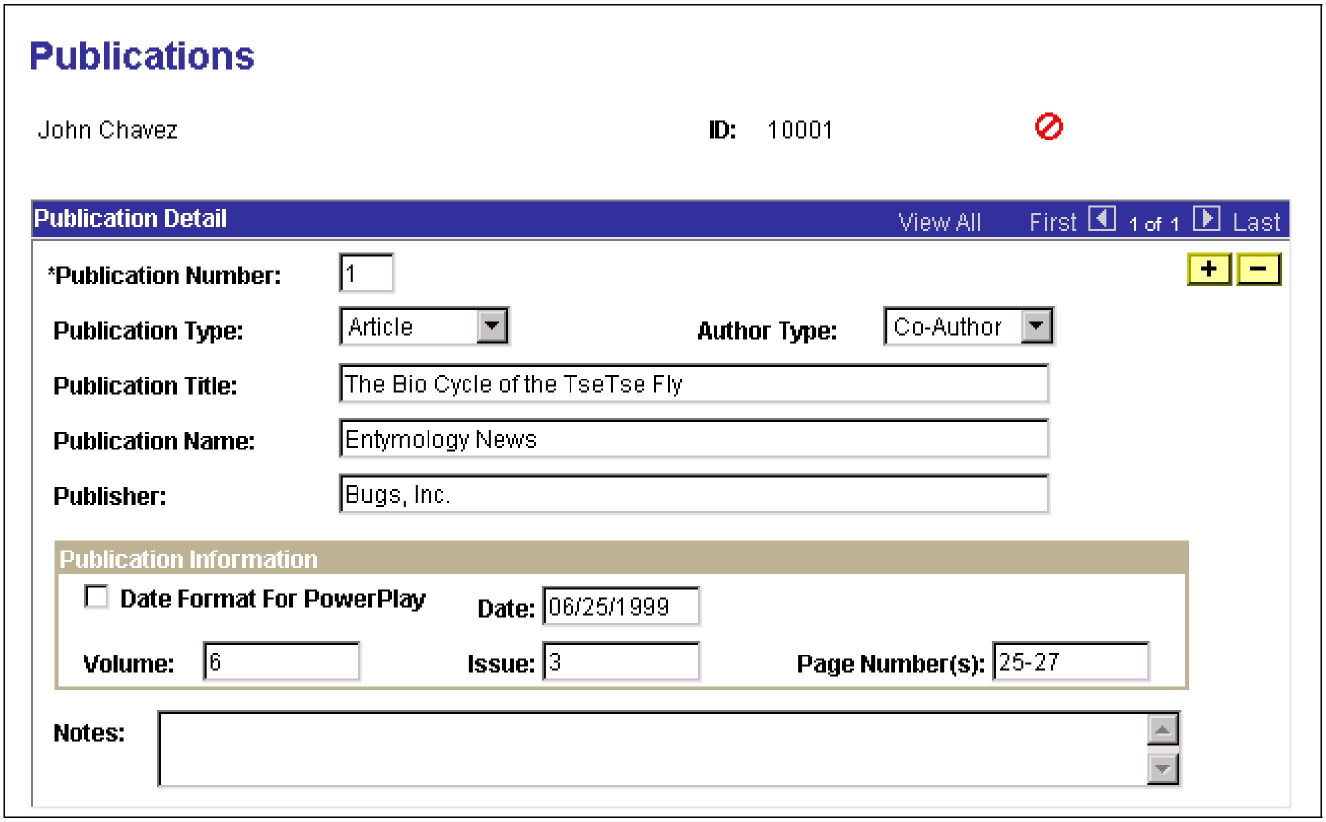
This section discusses how to enter publications data.

Page Used to Enter Publications Data

Page Name	Object Name	Navigation	Usage
Publications	LS_PUBLICATIONS	• Build Community, Participation Data, Use, Publications, Publications • Develop Enrollment, Process Applications, Use, Publications, Publications • Develop Enrollment, Recruit Prospective Students, Use, Publications, Publications	Enter publications data for an individual.

Entering Publications Data

Access the Publications page



Publications page

Publication Number

The number of this publication in the list of publications for this individual.

The system enters the next sequential number for each publication that you add. You can override the number to reorder the list of publications.

Publication Type

Specify the type of publication *(Article, Book, Presentation, Record, Thesis,* or *Video)*.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Author Type

Specify the type of this individual's authorship participation *(Author, Co-Author,* or *Editor)* in the publication.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Publication Title

Enter the title of the publication.

Publication Name

Enter the name of the magazine, journal, book, or other, in which the publication appeared.

Publisher

Enter the name of the publisher of the magazine, journal, book, or other, in which the publication appeared.

Date Format For PowerPlay

Select to indicate that the value in the Date field must be selected from the calendar feature or entered in a valid date format.

When not selected, the value in the Date field can be any value or format of up to 10 characters.

Date Enter the date of the publication.

Volume Enter the volume, if any, of the magazine, journal, book, or other in which the publication appeared.

Issue Enter the issue, if any, of the magazine, journal, book, or other in which the publication appeared.

Page Number(s) Enter the page number(s), if any, of the magazine, journal, book, or other in which the publication appeared.

Notes Enter notes or comments to further identify or describe the publication by this individual.

CHAPTER 31

Managing Health Data

This chapter provides an overview of maintaining health data and discusses how to:

- Process accommodations.
- Track immunization and health data.
- Track audiometric examination data.
- Track eye examination data.
- Track physical examination data.

See Also

Chapter 9, "Setting Up Health Data," page 81

Understanding Health Data

You can track health and medical exam data for every individual in your database. Use the pages described in this section to set up physicians and diagnosis codes, identify accommodation requests due to health and disability requirements, and enter various health exam and results for individuals.

Common Elements Used in This Chapter

Baseline Select this check box to indicate that the current examination is the baseline examination for tracking the individual's physical condition over time.

Country The country of the physician's address. When the Physician ID field is entered, and you select the country and exit the Country field, the system displays the physician's address (from the Physician Table – Address page) based on the specified country. If the individual does not have a physician ID in your system, enter his or her address here.

Date Received Enter the date that you received or are entering the information about the test or event.

Date Taken Enter the date that the individual took the test or immunization or completed the event.

Does Not Apply Select this option to indicate that the test or event is not relevant for this individual.

Exam Date	The date when the exam was administered. The default exam date is the system's current date. You can override this date.
Exam Type	Select the type of exam for this individual (for example, *General Health, Annual, Drug-Screening,* or *Fit for Duty*). Values for this field are delivered with your system as translate values. You can modify these translate values.
Expiration Date	Enter the date that the effectiveness of the test or immunization or event will expire.
Next Exam	The date when this individual should be reevaluated. The system calculates and displays this date based on the examination type that you specify. You can override the calculated date. The system calculates the dates based on these values: *Annual:* One year later. *Exposure:* Six weeks later. *Periodic Surveillance:* Six months later.
Physician	The name of the physician or other specialist who administered the exam. When you enter the physician ID, the system displays the individual's name. If the individual does not have a physician ID in your system, you must enter his or her name here (or go to the Physician Table – Name page, add the name, and return to this page).
Physician ID	Enter the ID of the physician or other medical professional (from the Physician Table – Name page) who administered the exam.
Referral	Select the place or people to which this individual is referred for further examination or treatment. Values for this field are delivered with your system as translate values. You can modify these translate values.
Test Not Taken	Select this option to indicate that the individual has not taken the test or has not completed the event.
Test Taken	Select this option to indicate that the individual has taken the test or has completed the event.

Processing Accommodations

Use accommodation codes to track the types of accommodations that your institution is requested or required to make and to track the changes that your institution approves and who is responsible for making them. You can enter data to track the requests for special accommodations and enter diagnosis codes for the disabilities that require the accommodation request. You can also enter various options that your institution might have in response to a request.

Note. Several fields on the Accommodations pages, including Job Code, Job Location, Job Code Tasks, and Regulatory Region, are defined on pages from the PeopleSoft Human Resources menus. If your institution uses PeopleSoft Human Resources Management System (HRMS), see your HRMS documentation to determine how to define and use those items in PeopleSoft Human Resources. Use these fields as needed in PeopleSoft Student Administration Solutions.

This section provides a list of prerequisites and discusses how to:

- Enter accommodation requests.
- Enter accommodation options.
- Enter employee job tasks that require the accommodation.

Prerequisites

Before entering and tracking accommodation data, do the following:

- Set up codes for types of accommodations.
- Define diagnosis codes to help identify reasons for the accommodation.
- Define regulatory regions.
- Set up business units, job codes, job locations, and job code tasks.

See Also

Chapter 9, “Setting Up Health Data,” Setting Up Accommodations, page 85

Chapter 9, “Setting Up Health Data,” Setting Up Diagnosis Codes, page 84

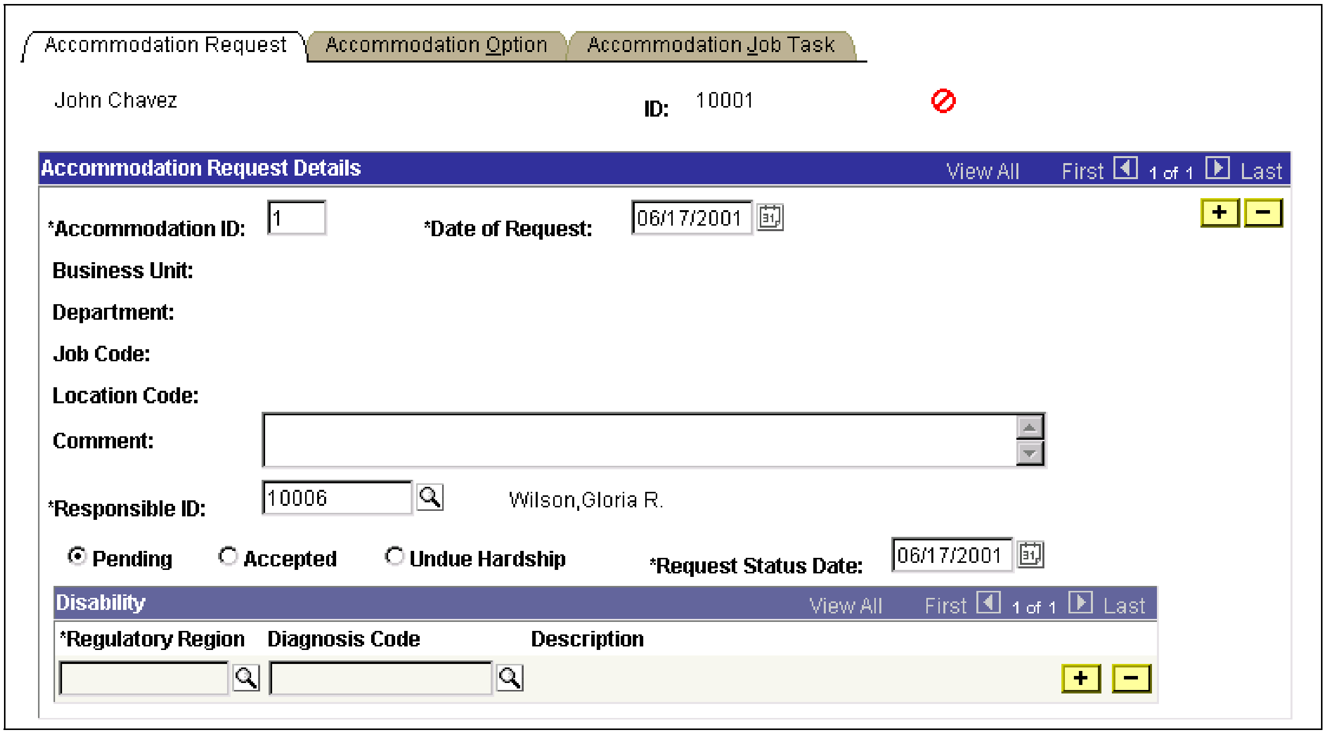
Chapter 2, “Designing PeopleSoft Campus Community,” Setting Up PeopleSoft Campus Community/HRMS Shared Elements, page 12

Pages Used to Process Accommodations

Page Name	Object Name	Navigation	Usage
Accommodation Request	ACCOMM_REQUEST_SA	Build Community, Health Data, Use, Accommodation Data, Accommodation Request	Enter and track an individual's accommodation request.
Accommodation Option	ACCOMM_OPTION_SA	Build Community, Health Data, Use, Accommodation Data, Accommodation Option	Enter and track options for an accommodations request.
Accommodation Job Task	ACCOMM_JOB_TASK_SA	Build Community, Health Data, Use, Accommodation Data, Accommodation Job Task	Enter and track the employee location and job task that is accommodated by honoring the request.

Entering Accommodation Requests

Access the Accommodation Request page.



Accommodation Request page

Accommodation ID

The number of this request on the list of this individual's accommodation requests.

The system displays the next sequential number for each accommodation request that you add. You can override the number to reorder the list of accommodation requests.

Date of Request

The date of this accommodation request. The default date is the system's current date, which you can override.

Comment

Enter comments that further identify the accommodation request for this individual.

Responsible ID

Select the ID of the individual at your institution who is managing this request.

Pending, Accepted, and **Undue Hardship**

Select one of these options to indicate that the request is pending (Pending), that it has been evaluated and accepted (Accepted), or that it has been evaluated and denied due to an undue hardship on the department or institution (Undue Hardship).

Request Status Date

Enter the date that the request was changed to pending status or was accepted or denied.

Regulatory Region

Select the code for the country whose regulations apply to this request.

Diagnosis Code

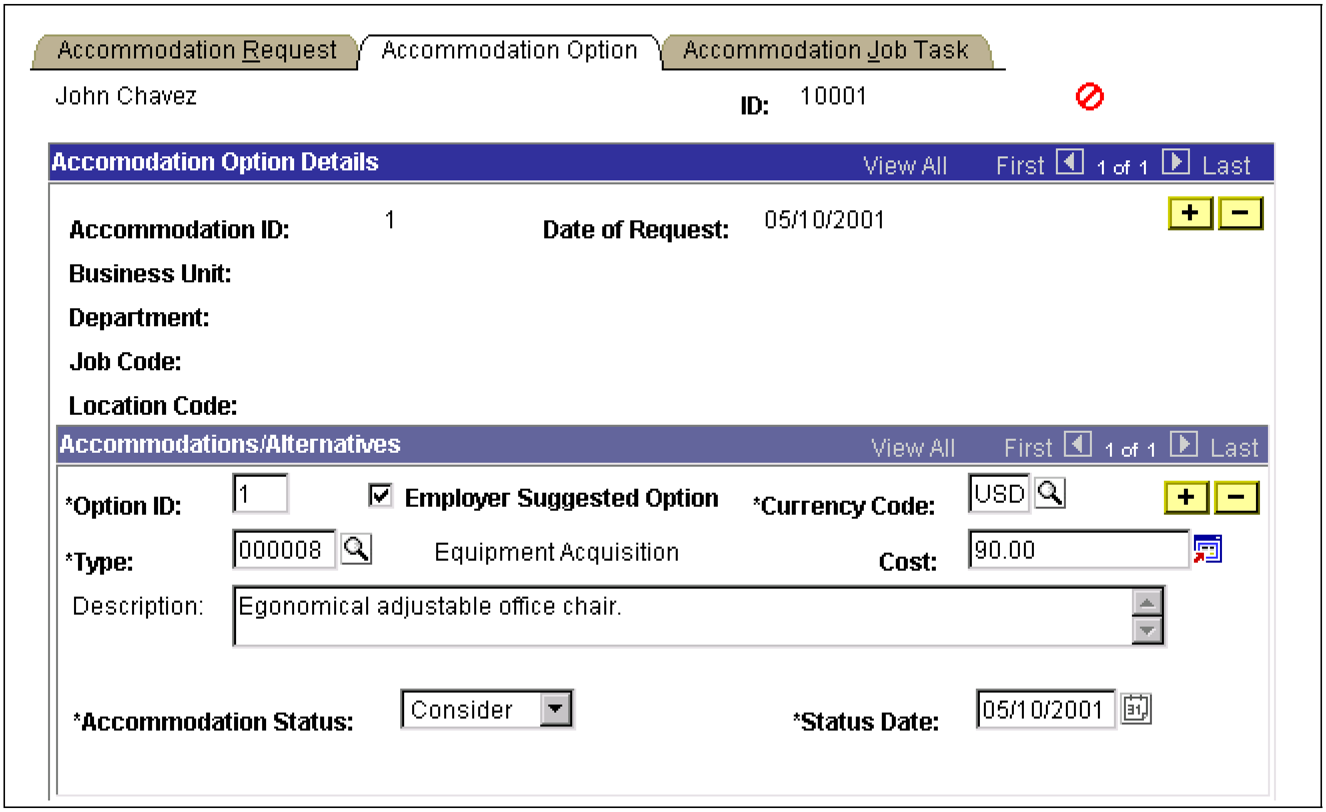
Select the diagnosis code (from the Diagnosis Table page) that describes the illness or disability for which accommodations have been requested.

Description

The system displays the description that is associated with the specified diagnosis code.

Entering Accommodation Options

Access the Accommodation Option page.



Accommodation Option page

Option ID

The system displays the number of this option request on the list of options for this accommodation request.

The system displays the next sequential number for each option that you add. You can override the number to reorder the list of options.

Employer Suggested Option

Select to indicate that someone on staff at your institution suggested this option.

Currency Code

Select the currency in which the cost is expressed.

Type

Select the type of accommodation (from the Accommodation Type Table page) that is recommended as part of this option.

Cost

Enter the cost of this type of accommodation.

Description

Enter comments to further describe or identify the item or service suggested in this option.

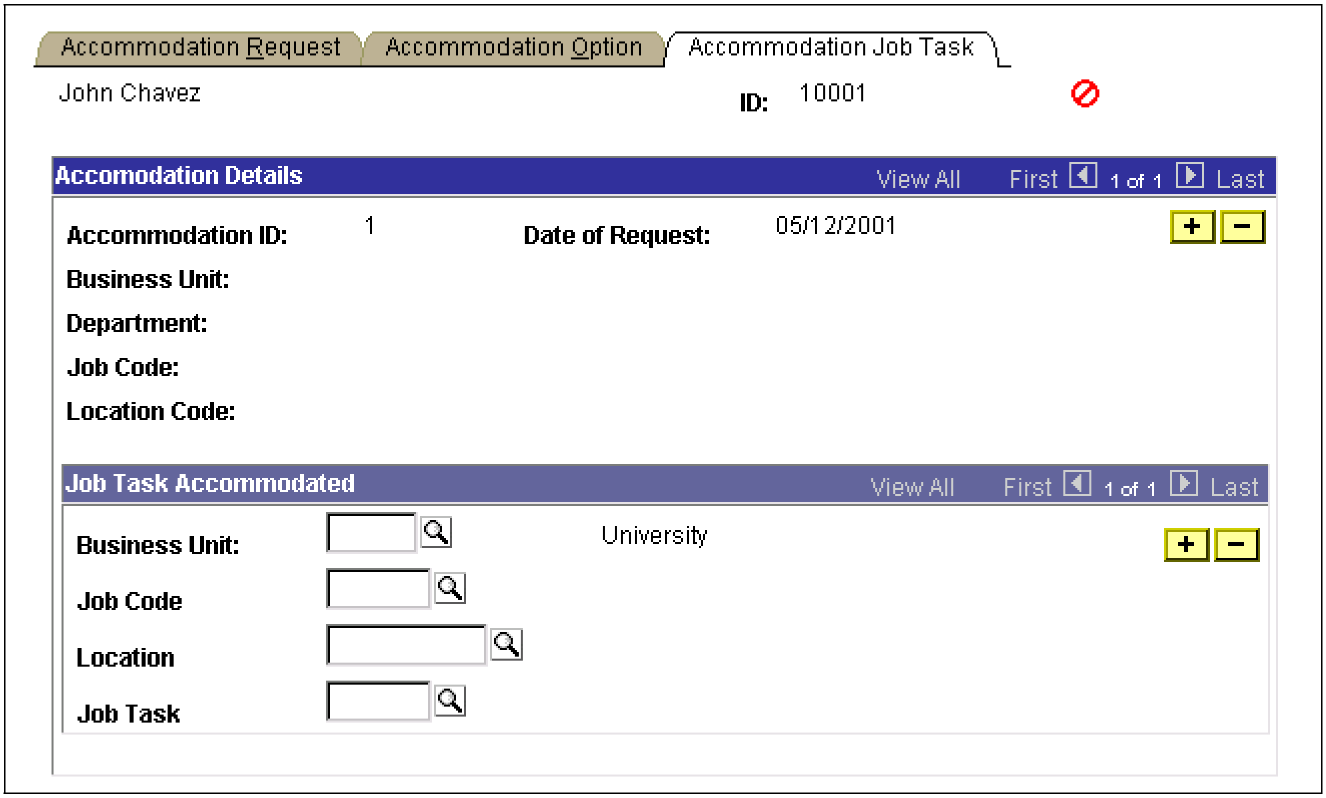
Accommodation Status

Select the status of this option: *Accepted, Approved, Consider, Offered,* or *Rejected.*

Status Date The date of the specified status.

Entering Accommodation Job Tasks

Access the Accommodation Job Task page.



Accommodation Job Task page

Use fields on this page to process employees.

See Also

PeopleSoft Human Resources Management System PeopleBooks

Tracking Immunization and Health Data

Use codes in your system to enter and track an individual's immunization and general health test data.

This section lists prerequisites and common elements and discusses how to:

- Enter immunization data for an individual.
- Enter health test data for an individual.

Prerequisites

Before you entering and tracking immunization and health data, define immunization codes, health test codes, and diagnosis codes.

See Also

Chapter 9, “Setting Up Health Data,” Setting Up Immunization and Health Test Types, page 87

Chapter 9, “Setting Up Health Data,” Setting Up Diagnosis Codes, page 84

Common Elements Used in This Section

Comments Enter comments to further identify or describe the immunization or health test.

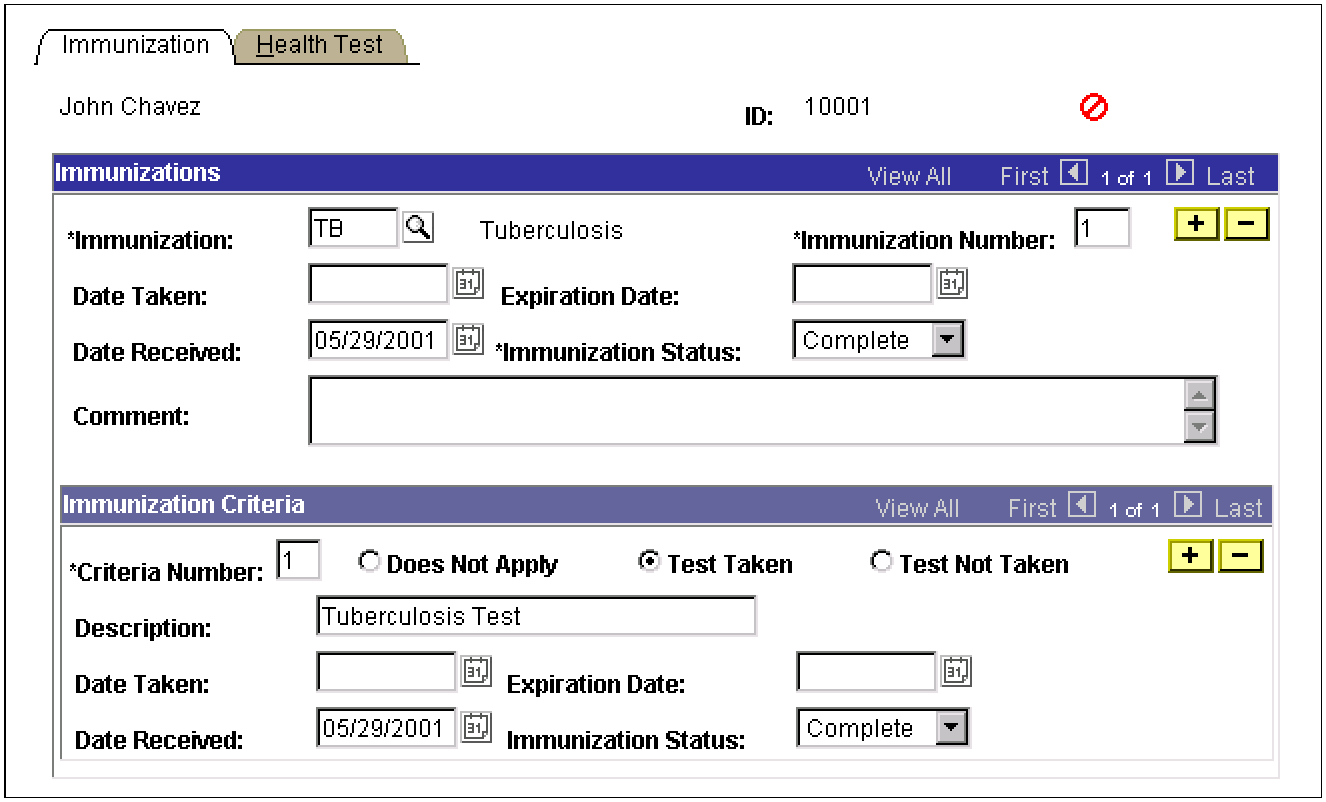
Criteria Number The criteria number for the immunization or health test.

Pages Used to Track Immunization and Health Data

Page Name	Object Name	Navigation	Usage
Immunization	IMMUNIZATION	Build Community, Health Data, Use, Immunizations and Health, Immunization	Enter immunization data for an individual.
Health Test	HEALTH_TEST	Build Community, Health Data, Use, Immunizations and Health, Health Test	Enter or review data from an individual’s health test.

Entering Immunization Data

Access the Immunization page.



Immunization page

Immunizations

Immunization Select the immunization (from the Immunization Table page) that this individual has received.

Immunization Number The number of this immunization on the list of immunizations for this individual.

The system displays the next sequential number for each immunization that you add. You can override the number to reorder the list of immunizations.

Immunization Status Select the status of this immunization: *Complete, Not On File,* or *Partial.*

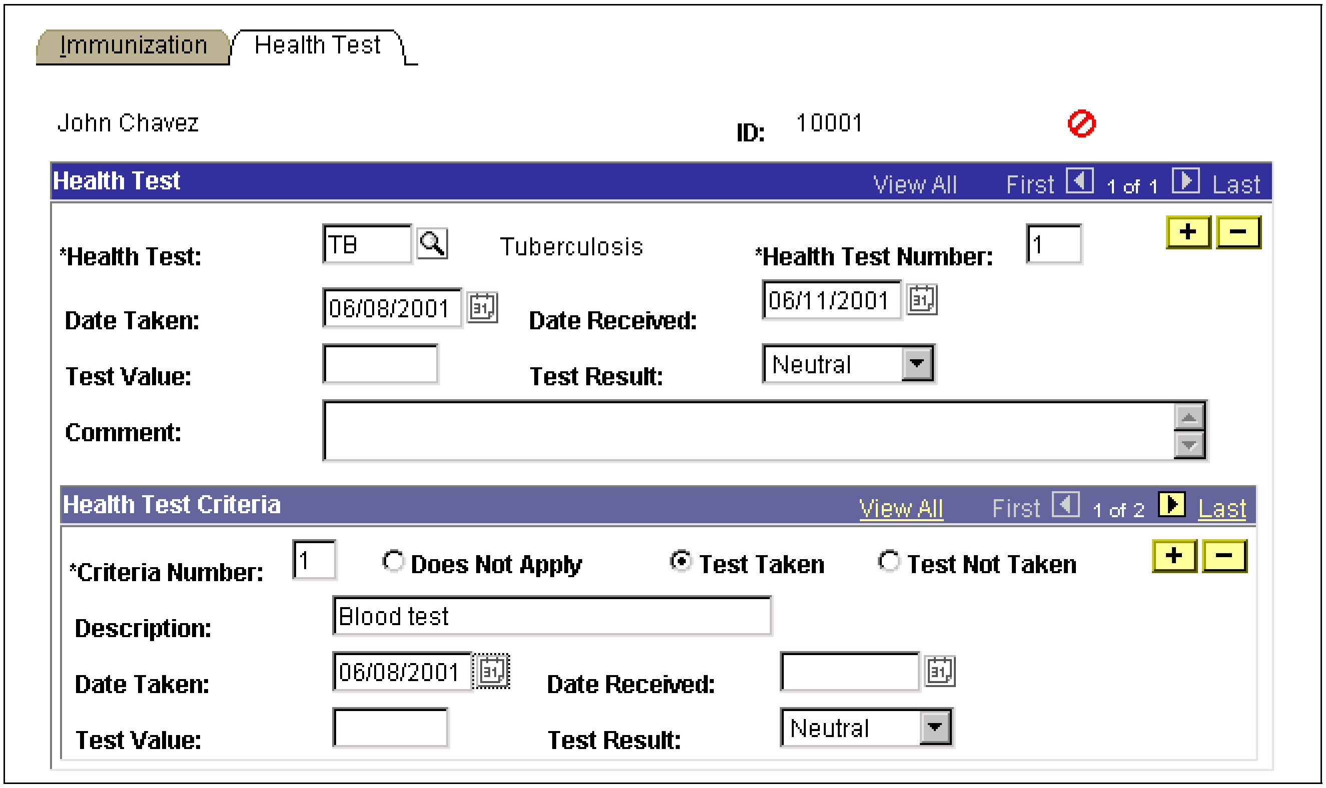
Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Immunization Criteria

When criteria are associated with this immunization on the Immunization Table page, the system displays the criteria data in this group box.

Entering Health Test Data

Access the Health Test page.



Health Test page

Health Test

Health Test Select the health test (from the Health Test Table page) that this individual has taken.

Health Test Number The number of this health test on the list of health tests for this individual.

The system displays the next sequential number for each health test that you add. You can override the number to reorder the list of health tests.

Test Value Enter the test result value, in alphabetic, numeric, percentage, or other form as expressed by the medical community; for example, *AB* or *O* (blood types) or *177* (cholesterol).

Test Result Select the overall test result: *Negative, Neutral,* or *Positive.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Health Test Criteria

When criteria are associated with this health test on the Health Test Table page, the system displays the criteria data in this group box.

Tracking Audiometric Exam Data

You can enter and track basic information about hearing tests for individuals in your database, including exam dates and results, who administered the examination, and when the individual should be reevaluated.

This section discusses how to:

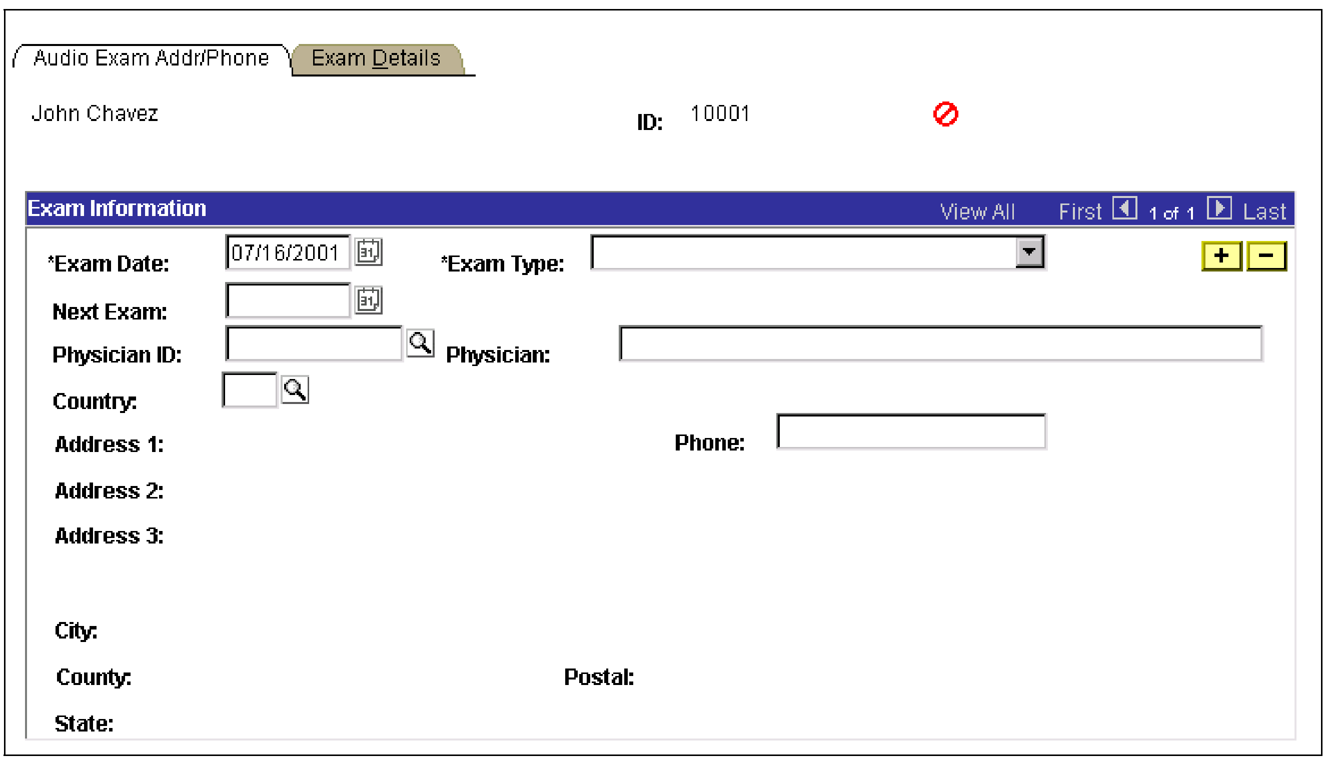
- Enter the examiner's address and phone data and basic exam information.
- Enter the exam details: results, referrals, and comments.

Pages Used to Track Audiometric Exam Data

Page Name	Object Name	Navigation	Usage
Audiometric Exam Addr/Phone (audiometric exam address/phone)	LS_HS_EXAM_AUDIO1	Build Community, Health Data, Use, Audiometric Exam, Audio Exam Addr/Phone	Enter the examiner's address and phone data and the date and type of audiometric exam administered.
Exam Details	LS_HS_EXAM_AUDIO2	Build Community, Health Data, Use, Audiometric Exam, Exam Details	Enter audiometric exam details, including results, referrals, and comments.

Entering Audiometric Exam Address/Phone Data

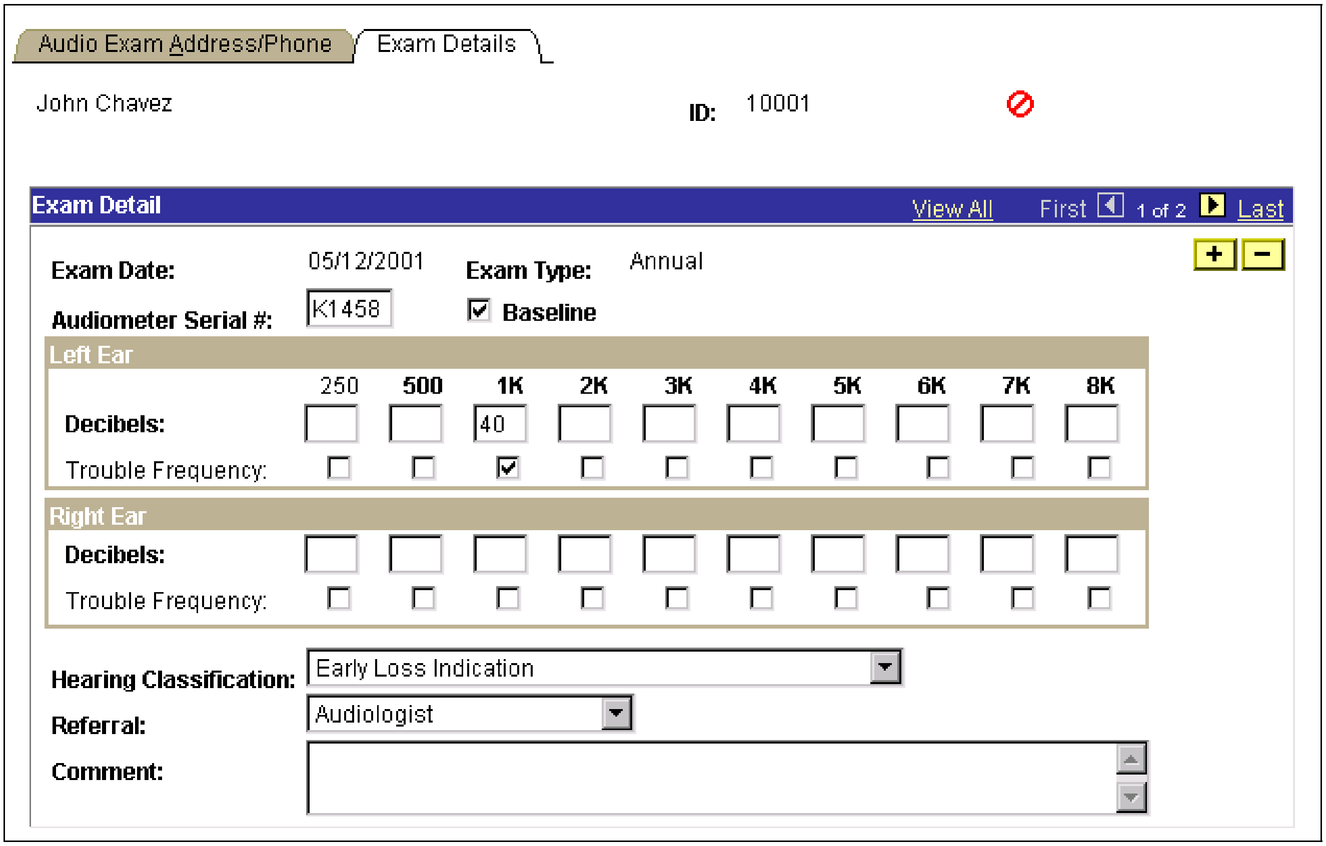
Access the Audio (audiometric) Exam Addr/Phone page.



Audiometric Exam Addr/Phone page

Entering Audiometric Exam Details

Access the Audio (audiometric) Exam Details page.



Exam Details page

Audiometer Serial # — The serial number of the audiometer that is used to administer this exam.

Decibels — For each ear, enter the decibel level at which the individual hears the specified frequency.

Trouble Frequency — Select to indicate that the individual did not hear this frequency within the appropriate decibel range.

Hearing Classification — Select the classification that describes the results of this exam. Values are *Abnormal, Shift, Early Loss Indication,* and *Normal.*

Values for this field are delivered with your system as translate values. You can modify these translate values.

Comment — Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Tracking Eye Exam Data

You can enter and track basic information about visual acuity exams, including exam date, who administered the exam, and whether the individual needs corrective lenses.

This section discusses how to:

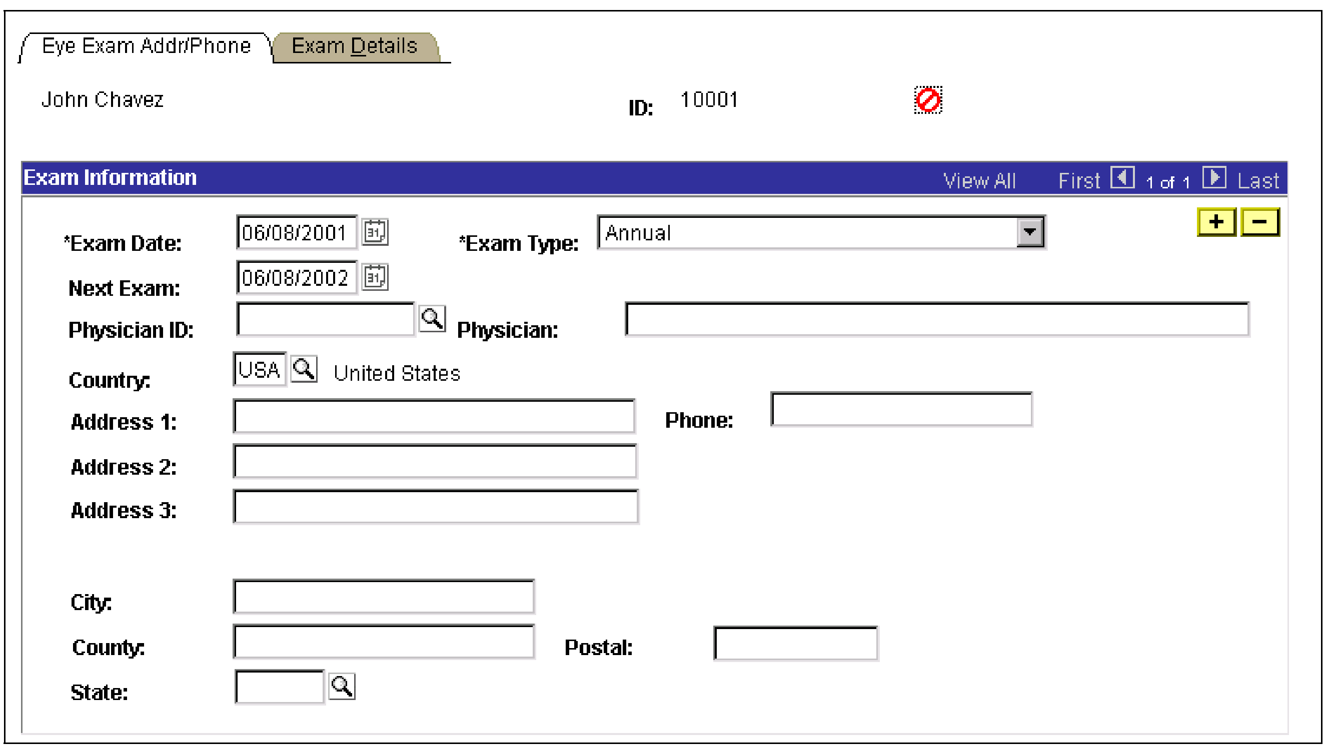
- Enter the examiner's address and phone data and basic exam information.
- Enter exam details: results, referrals, and comments.

Pages Used to Track Eye Exam Data

Page Name	Object Name	Navigation	Usage
Eye Exam Address/Phone	LS_HS_EXAM_EYE1	Build Community, Health Data, Use, Eye Exam, Eye Exam Addr/Phone	Enter the examiner's address and phone data, and the date and type of eye exam administered.
Eye Exam – Exam Details	LS_HS_EXAM_EYE2	Build Community, Health Data, Use, Eye Exam, Exam Details	Enter eye exam details, including results, referrals, and comments.

Entering the Eye Examiner's Address and Phone Data

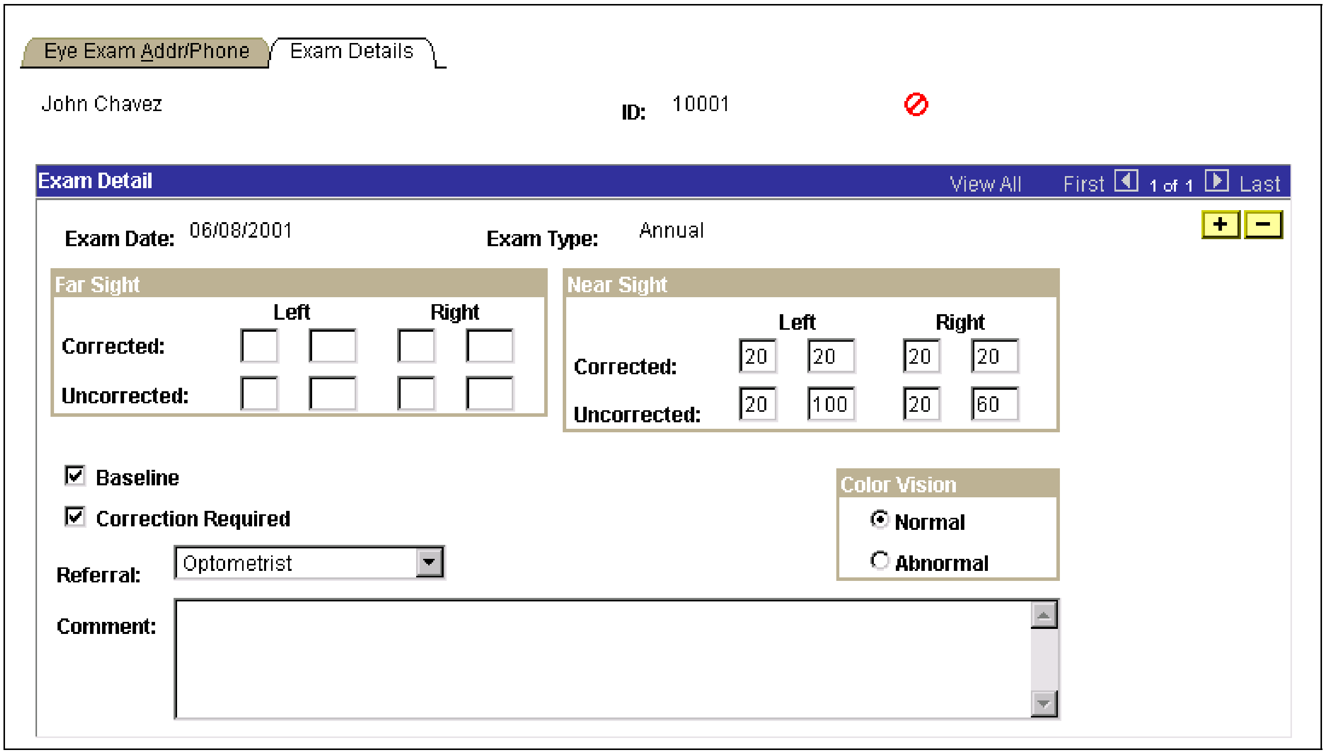
Access the Eye Exam Address/Phone page.



Eye Exam Address/Phone page

Entering Eye Exam Details

Access the Eye Exam – Exam Details page.



Eye Exam – Exam Details page

Corrected and **Uncorrected**	For each eye, enter the visual acuity with and without corrective lenses.
Correction Required	Select to indicate that this individual needs lenses or other corrective treatment.
Normal and **Abnormal**	Select one of these options to indicate that the individual's color perception is normal or abnormal.
Comment	Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Tracking Physical Exam Data

You can enter and track basic information physical examinations for individuals in your database, including exam dates and types and who administered the exam. You can also enter an individual's donor information, blood type, referrals, and other comments.

This section discusses how to:

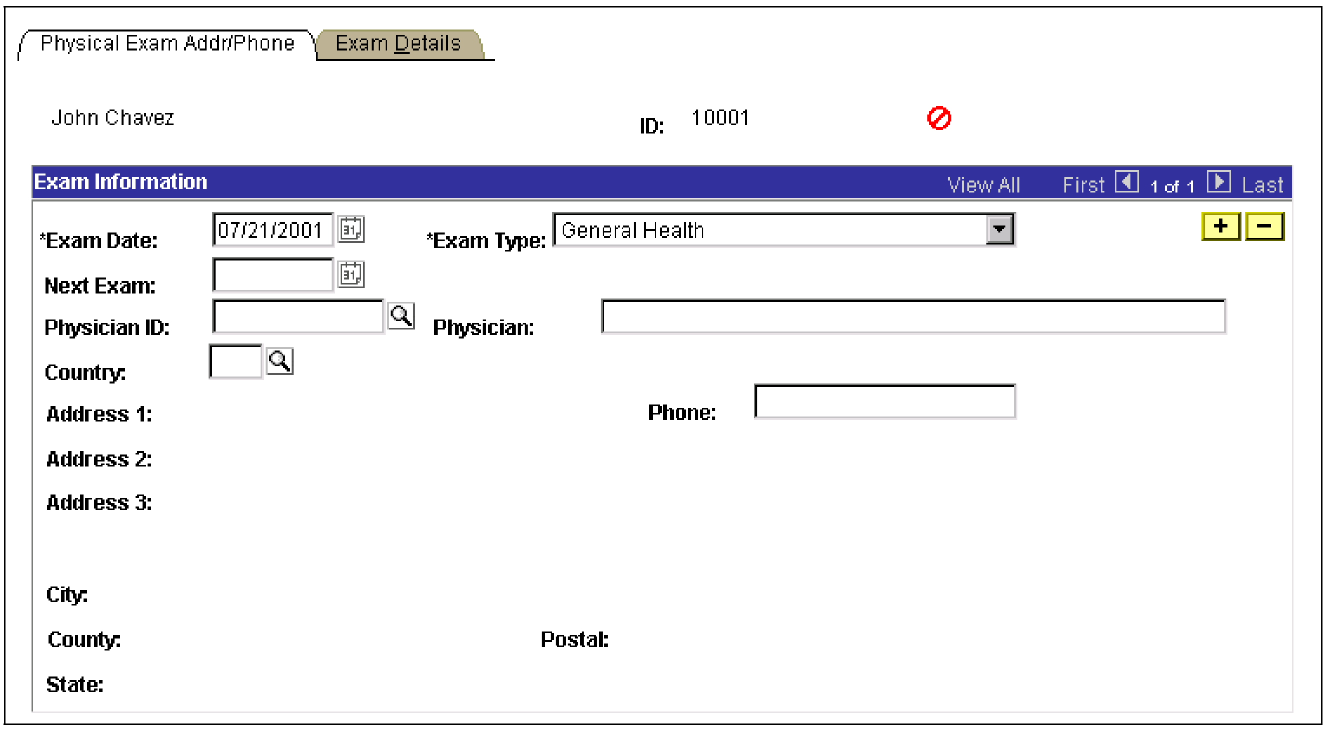
- Enter the examiner's address and phone data and basic exam information.
- Enter exam details: results, donor information, blood type, referrals, and comments.

Pages Used to Track Physical Exam Data

Page Name	Object Name	Navigation	Usage
Physical Exam Addr/Phone (physical exam address/phone)	LS_HS_EXAM_PHYSIC1	Build Community, Health Data, Use, Physical Exam, Physical Exam Addr/Phone	Enter the examiner's address and phone data and the date and type of the physical exam.
Exam Details	LS_HS_EXAM_PHYSIC2	Build Community, Health Data, Use, Physical Exam, Exam Details	Enter details about the exam, including results, donor information, blood type, referrals, and comments.

Entering the Physical Exam Address and Phone Data

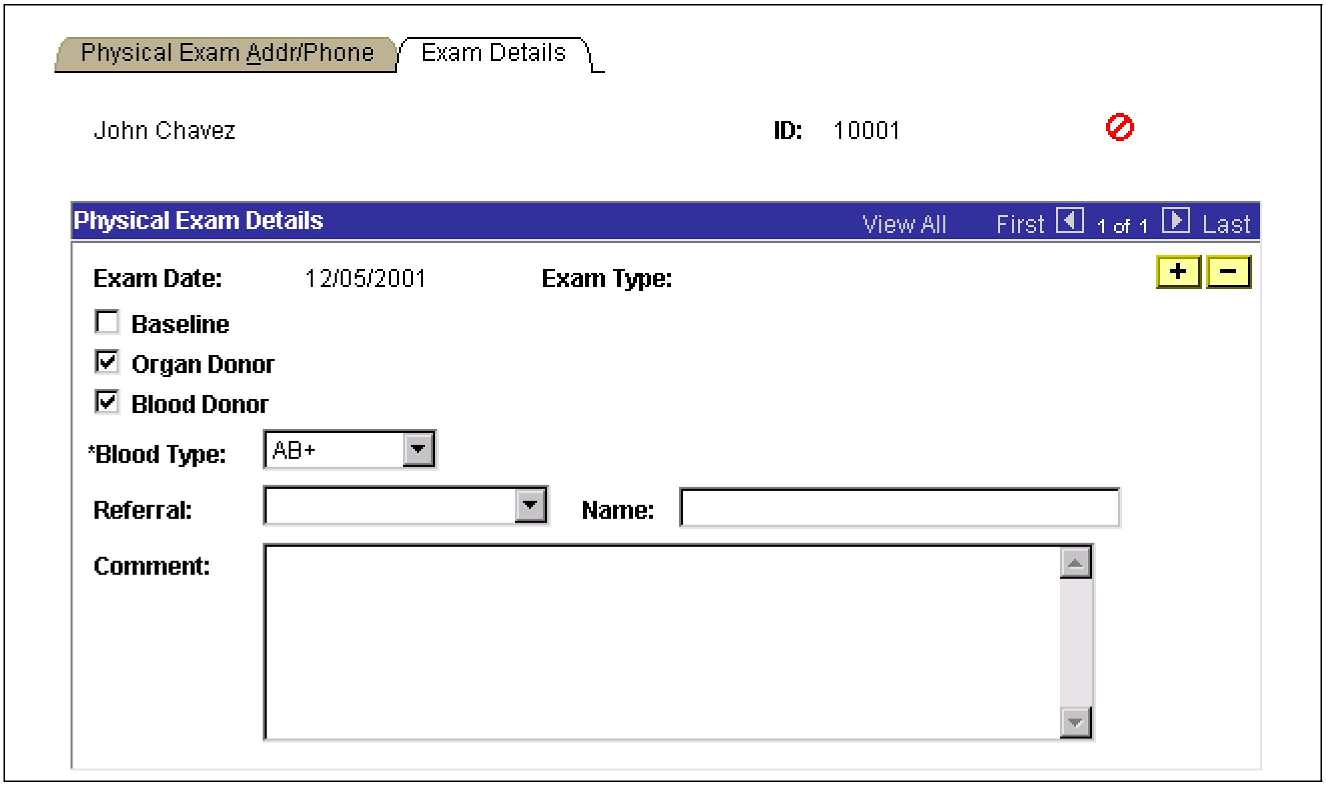
Access the Physical Exam Address/Phone page.



Physical Exam Addr/Phone page

Entering Physical Exam Details

Access the Exam Details page.



Exam Details page

Organ Donor and **Blood Donor** — Select to indicate that this individual is or wants to be an organ donor or a blood donor.

Blood Type — Select this individual's blood type.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Name — Enter the name of the person to contact at the place of referral.

Comment — Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Tracking Respiratory Exam Data

You can enter and track basic information about respiratory examinations for individuals in your database, including exam dates, types, and results; who administered the exam and when the individual should be reevaluated.

This section discusses how to:

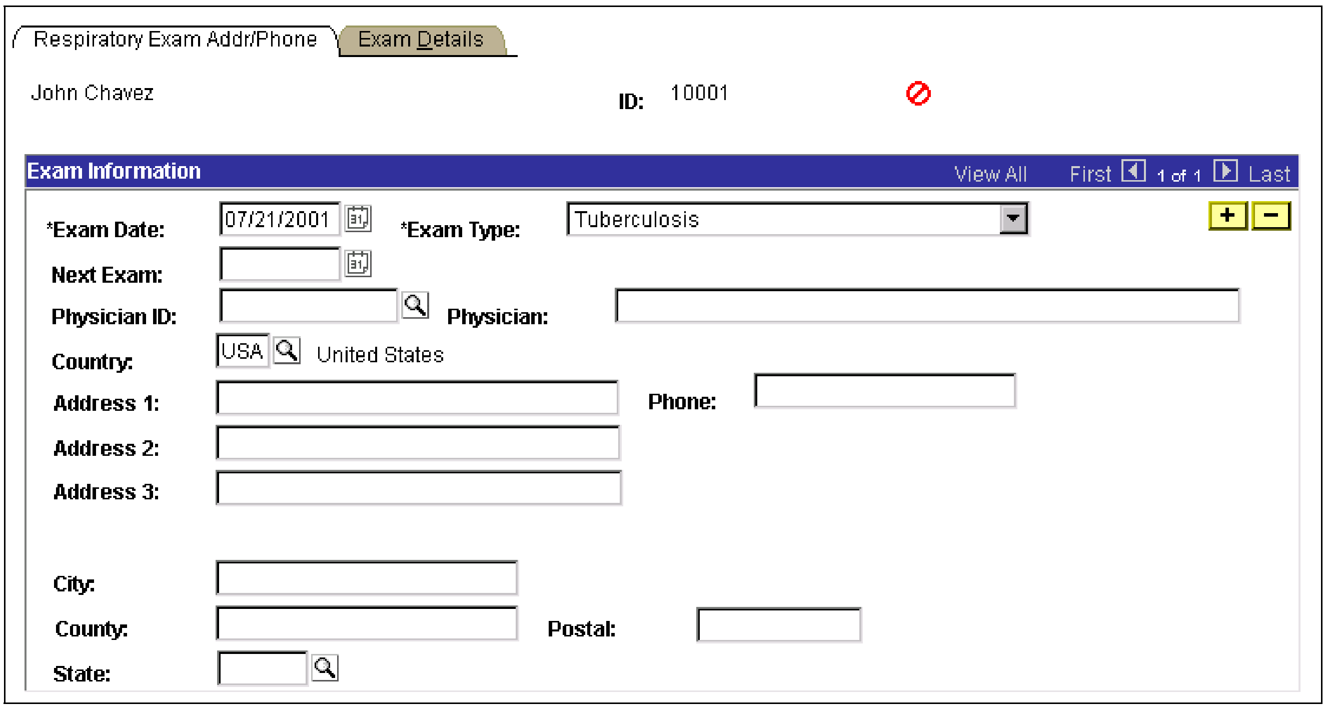
- Enter the examiner's address and phone data and basic exam information.
- Enter exam details: results, referrals, and comments.

Pages Used to Track Respiratory Exam Data

Page Name	Object Name	Navigation	Usage
Respiratory Exam Addr/Phone (respiratory exam address/phone)	LS_HS_EXAM_RESPIR1	Build Community, Health Data, Use, Respiratory Exam, Respiratory Exam Addr/Phone	Enter the examiner's address and phone data, and the date and type of respiratory exam.
Exam Details	LS_HS_EXAM_RESPIR2	Build Community, Health Data, Use, Respiratory Exam, Exam Details	Enter the respiratory exam details, including results, referrals, and comments.

Entering the Respiratory Exam Address and Phone Data

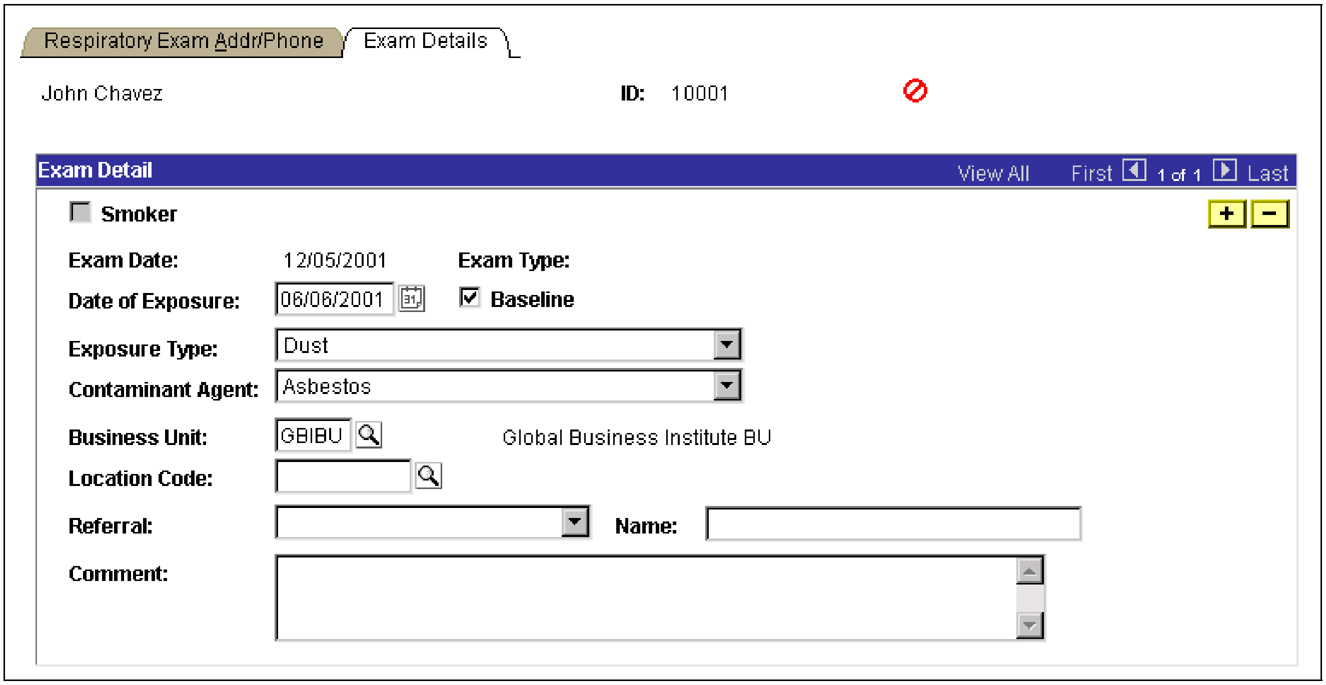
Access the Respiratory Exam Address/Phone page.



Respiratory Exam Addr/Phone page

Entering Respiratory Exam Details

Access the Exam Details page.



Exam Details page

Note. Some fields that appear on PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions pages are related to PeopleSoft HRMS only. For example, the Smoker check box on this page is an HRMS-only option.

Date of Exposure — The date when this individual was exposed to the contaminant, causing the need for this exam.

Exposure Type — The type of exposure that the individual endured (for example, *Biohazard, Chemicals,* or *Dust*).

Values for this field are delivered with your system as translate values. You can modify these translate values.

Contaminant Agent — The specific contaminant to which the individual was exposed (for example *Asbestos, Lead,* or *Mercury)*.

Business Unit — Select the business unit or department that was responsible at the time of the exposure or contamination

Location Code — Select the location where the contamination took place.

Name — Enter the name of the person to contact at the place of referral.

Comment — Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

CHAPTER 32

Managing Services Data

This chapter provides an overview services data and discusses how to:

- Track relations with the institution.
- Enter external system IDs.
- Assign personal identification numbers (PINs).
- Enter decedent data.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Personal Portfolio Collaborative Application you can use the self-service pages described here.

See Also

Chapter 21, “Managing FERPA,” page 221

Chapter 22, “Managing Service Indicators,” page 231

Chapter 40, “Using PeopleSoft Personal Portfolio Collaborative Application,” Exposing Self-Service Services Data, page 514

Understanding Services Data

Services data enables you to enter additional information that may be of service to your institution about individuals. For example, you can identify how an individual is related to your institution – an individual may currently be both a student and an employee. A student will also have been a prospect and an applicant.

You can also enter and track IDs from external systems and correlate them to individuals or organizations in PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions. For example, if your institution uses a separate housing database, you could identify the individual’s housing ID here.

Use the Personal Identification Number page to assign PINs to individuals as required at your institution. For example, if your institution uses a separate housing database and individuals need a PIN to access their own housing information, you can assign that here.

When an individual dies, you can enter the date and place of death and the death certificate number if you have it. When you enter and save the date of death on the Decedent Data page, the system displays the word *DECEASED* on each page in your database about that individual to communicate that information across your institution. All of the decedent’s data remains in your database unless or until you delete the ID.

Tracking Relations With the Institution

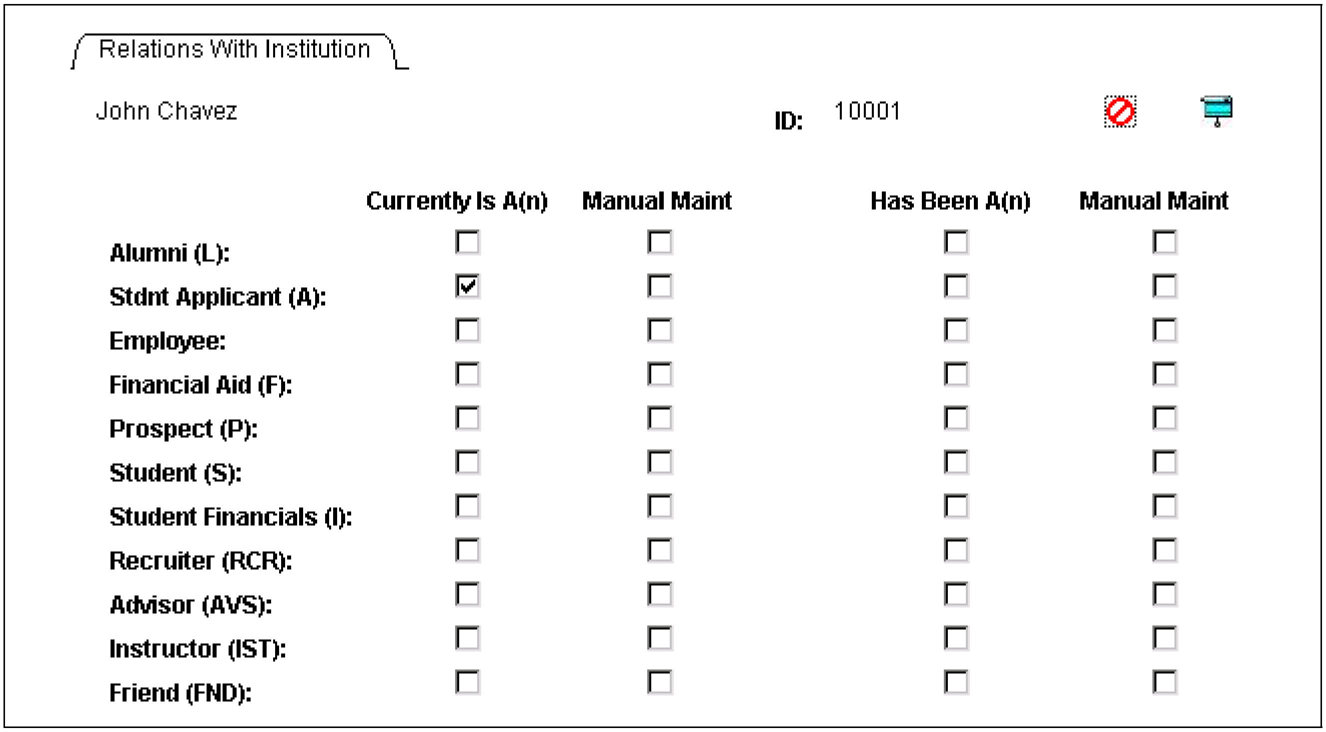
This section discusses how to specify or review an individual's relation to your institution.

Page Used to Track Relations With the Institution

Page Name	Object Name	Navigation	Usage
Relations With Institution	PERS_INST_REL	• Build Community, Services Data, Use, Relations With Institution, Relations With Institution • Manage Student Financials, Maintain Customers, Use, Relations With Institution, Relations With Institution • Develop Enrollment, Process Applications, Use, Relations With Institution, Relations With Institution • Develop Enrollment, Recruit Prospective Students, Use, Relations With Institution, Relations With Institution	Specify or review an individual's relation to your institution.

Specifying or Reviewing an Individual's Relation to Your Institution

Access the Relations With Institution page.



Relations With Institution page

Currently Is A(n)
When selected, indicates that the individual is currently related in this way to your institution.

Has Been A(n)
When selected, indicates that the individual has previously been related in this way to your institution.

Manual Maintenance
When selected, indicates that this relationship (current or past as appropriate) should be maintained manually and not used or changed by mass change or any other automatic process.

Note. PeopleSoft Contributor Relations Solutions uses the abbreviations on this page in their CR search.

See *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, “Managing Constituent Data,” Using CR Search.

Entering External System IDs

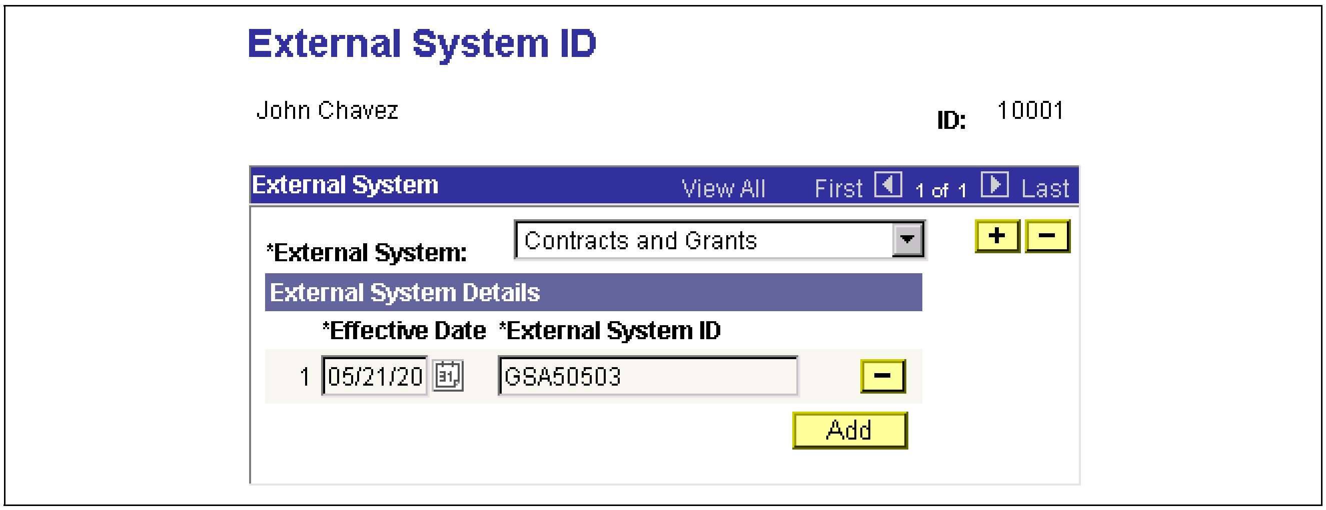
This section discusses how to enter external system IDs.

Page Used to Enter External System IDs

Page Name	Object Name	Navigation	Usage
External System ID	EXTERNAL_SYS_ID	• Build Community, Services Data, Use, External System ID, External System ID • Manage Contributor Relations, Manage People, Use, External System ID, External System ID	Track individual ID's that are external to your PeopleSoft Student Administration or PeopleSoft Contributor Relations system.

Entering an External System ID

Access the External System ID page.



External System ID page

External System

External System

Select the external system that contains the ID you want to enter.

Values for this field are delivered with your system as translate values. You can modify these translate values.

External System Details

External System ID

Enter the external system ID for the individual. If the individual has several IDs in this external system, you can add them here.

Assigning Personal Identification Numbers (PINs)

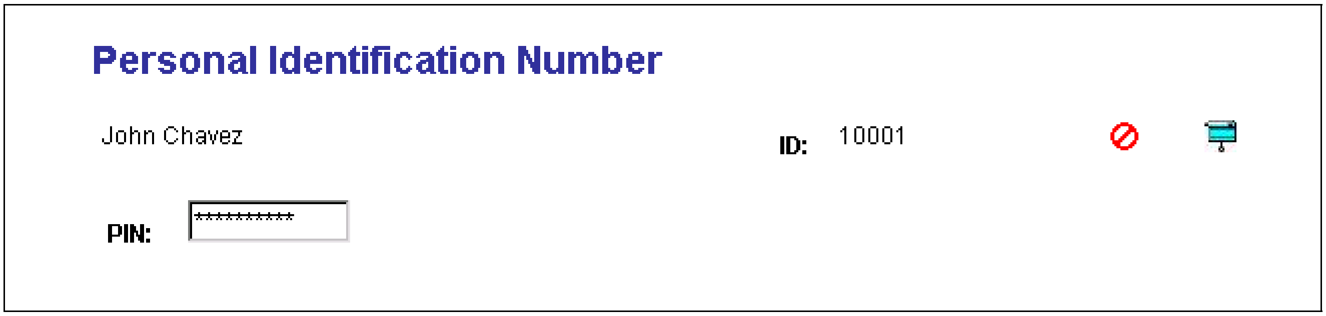
This section discusses how to assign PINs.

Page Used to Assign PINs

Page Name	Object Name	Navigation	Usage
Personal Identification Number	PIN	Build Community, Services Data, Use, PIN, PIN Number	Assign PINs to individuals.

Assigning a PIN

Access the Personal Identification Number page.



Personal Identification Number page

PIN Enter the personal identification number for this individual.

The number can be up to nine characters, either alpha or numeric. For confidentially, the characters display as asterisks as you enter them.

Entering Decedent Data

This section provides an overview of the deceased label and discusses how to enter decedent data.

Understanding the Deceased Label

When an individual dies, you should apply the deceased label to all pages about that individual. Then, when users encounter a page with the word *DECEASED* at the top, they can determine whether to continue or suspend their department's transactions for that individual.

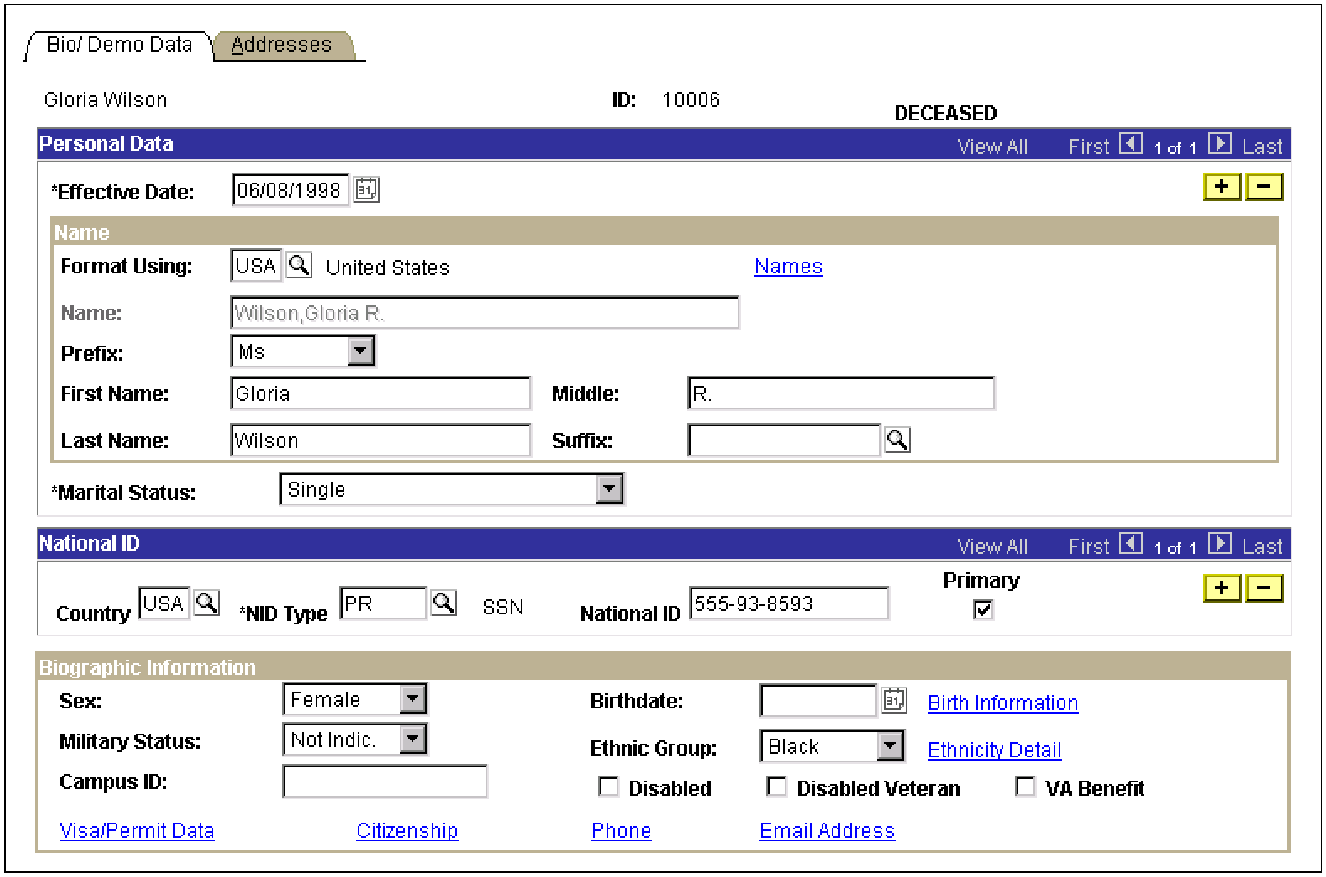
You can apply the label using either of the following methods. In both methods, when you save the individual's page, the system displays the word *DECEASED* at the top of the pages in place of the usual negative or positive service indicator button.

- To display the deceased label and not enter any other decedent data (place of death, death certificate number), assign your institution's deceased service indicator to the decedent. The service indicator sets the deceased label to display. You can use this method whether or not you know the individual's date of death.
- If you know the individual's date of death, you can enter that date on the Decedent Data page along with other decedent data, and save the page. You can use this method to apply the deceased label *only* if you know the date of death.

For example, you might receive confirmation that Gloria is deceased. You want to apply the deceased label to all pages about her as soon as possible to alert users. However, you have not received a copy of the death certificate or official confirmation of her date of death. Since you do not know when she died, you could assign her your institution's deceased service indicator, which is the one set to display the deceased label.

You can verify that the label is applied by accessing any page about the decent. The word *DECEASED* appears at the top right of the page.

For example, you could access the Bio/Demo Data page.



Example of the Bio/Demo Data page with the DECEASED label applied

All of the decedent's data remains in your database unless or until your system administrator deletes the decedent's ID.

See Also

Chapter 6, "Setting Up Service Indicators," page 57

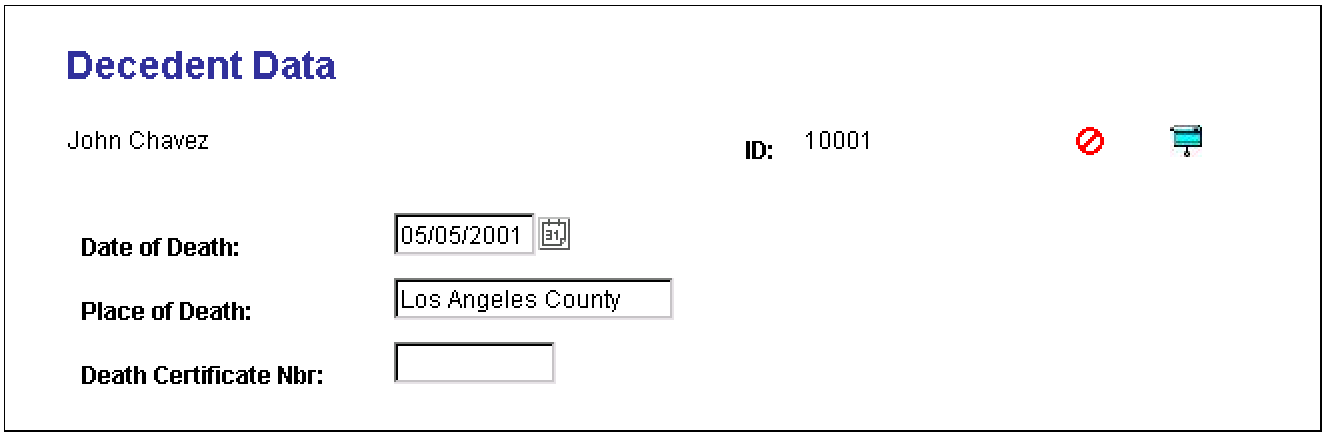
Chapter 18, "Managing IDs," Deleting IDs, page 152

Page Used to Enter Decedent Data

Page Name	Object Name	Navigation	Usage
Decedent Data	SA_DECEASED_DATA	• Build Community, Services Data, Use, Decedent Data, Decedent Data • Manage Contributor Relations, Manage People, Use, Decedent Data, Decedent Data	Enter the date of death and other data about the decedent. Only the date of death is required to display the deceased label.

Entering Date of Death and Other Decedent Data

Access the Decedent Data page.



Decedent Data page

Date of Death

Enter the individual's date of death. You can enter the official date death or the date when your institution was notified of the death. It is up to your institution.

When you enter a date and save the page, the system displays the word *DECEASED* at the top of pages about this individual throughout your system. If you do not enter a date, the deceased label will not appear.

Note. If you do not know the date of death, use the Service Indicator page to assign your institution's deceased indicator to this individual.

After you enter a date of death and save the Decedent Data page, if you decide that you do not want the deceased label to appear on pages for this individual, return to the Decedent Data page, highlight and delete the date, and save the page with an empty Date of Death field. The deceased label will no longer appear.

Place of Death

Enter the place (city, state, county, or country) where the individual expired.

Death Certificate Number

Enter the number from the official certificate of death.

The death certificate number may be required for financial aid reconciliation if the individual is a student, for beneficiary pay out if the individual is an employee, or to receive funds if the individual donated a trust to your institution. Consult your institution's administration.

CHAPTER 33

Adding Organizations to Your Database

This section provides an overview organizations and discusses how to:

- Create organization records.
- Enter school related data.
- Enter affiliations.

Understanding Organizations

Organizations can include high schools, colleges or universities, community or civic groups, government entities, test and transcript data companies, office supply vendors, and so on. You can create a record for each organization and enter the location of the organization with telephone numbers and electronic addresses. You can enter persons at the organization with whom your institution maintains contact and specify the primary location, department, and contact person that your institution should use.

For schools, you can identify the subjects and courses that they offer, the types of transcripts they generate, and their term, grading, and credit structure. Maintaining this information helps to convert their information into an equivalent at your institution so you can evaluate it according to your requirements.

After you have set up group types, contact types, and external subjects, terms, and courses, you can start adding organizations to your database and selecting from those items to help describe or identify each organization.

To add an organization to your system, create an organization record on the Organization Table page. When you enter data and save the record, the system assigns the next available sequential organization ID to that organization and adds the record to your database. That ID remains associated with the organization unless you change or delete it. You can use the organization name or its unique ID to access the record and update the organization information and specify primary contacts, locations, departments and so on.

Important! When you save the new organization record, the system does not notify you if a duplicate organization already exists. The system simply assigns the ID and adds the organization. To avoid creating duplicate records, you should use the organization search function to determine if an organization with the same data already exists in your database before adding the new one.

When an organization is a supplier, you can identify it as a vendor and make note of the taxpayer identification number (TIN).

When an organization is also a school or other institution that offers courses, you can identify and track the subject areas that the organization offers and the specific courses that it offers within that subject area. Maintaining subject and course data is especially valuable when evaluating transcripts from other institutions.

You can identify items that are important to your institution's academic affiliations with organizations, including their grading structure and the types of transcripts that they generate. Maintaining this information helps you convert their information into an equivalent at your institution so that you can evaluate.

You update organization data on the Organization Table page and other organization pages, but in the Update/Display mode after adding the organization.

Warning! Before adding organizations or entering and updating data about them, you must be familiar with PeopleSoft applications, including the *Add, Update/Display, Include History,* and *Correct History* modes and the PeopleSoft method of applying effective dates with active or inactive status. For more information, see *Using PeopleSoft Applications:* Understanding Effective Dates, in your PeopleTools documentation.

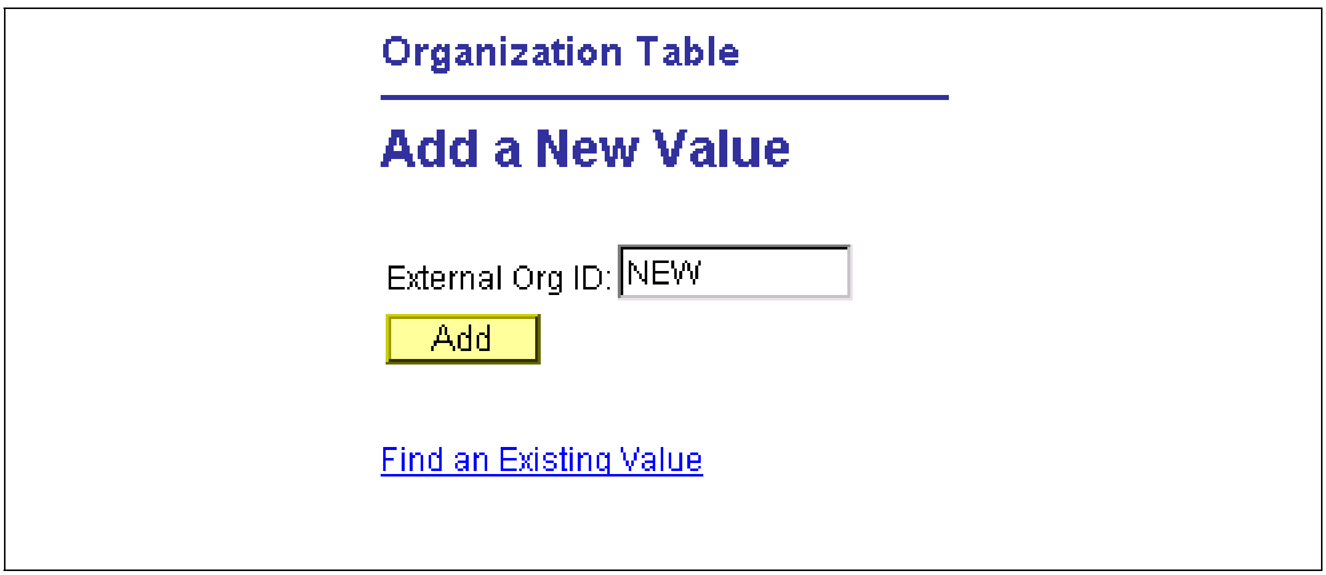
To create an organization record:

1. Select *Build Community, Organization Data, Use, Organization Table.*
2. Select the *Add a New Value* link at the bottom of the Organization Table – Find an Existing Value search page.

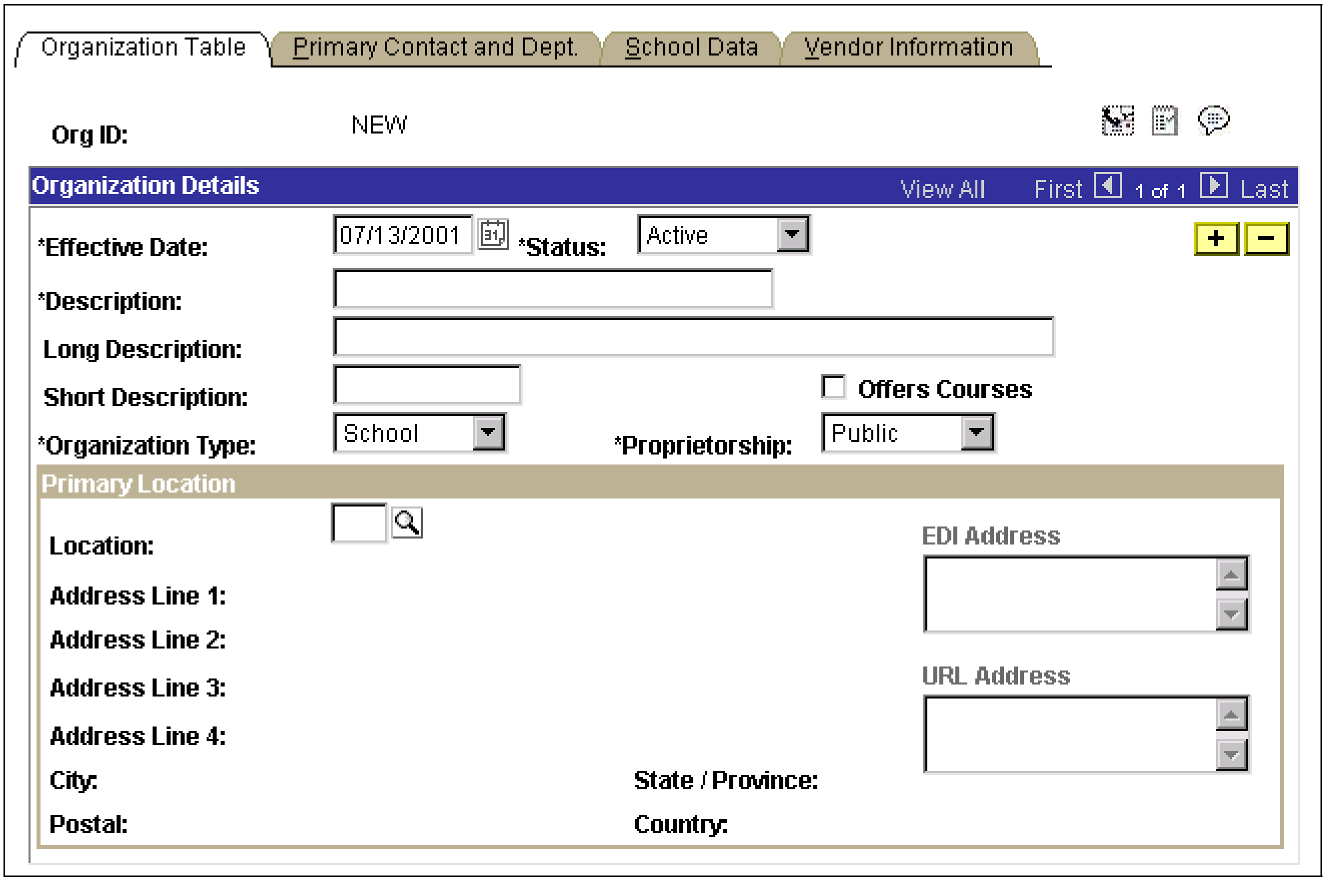
   The Organization Table – Add a New Value search page appears with the word of *NEW* in the *External Org ID* field.
3. Click the *Add* button.

   The Organization Table page appears with ID of *NEW.*

Warning! If you overwrite the word *NEW* in the External Org ID field on the Organization Table – Add a New Value, and manually enter an ID for the organization that you are adding, you will disrupt the system's auto-numbering sequence. A system administrator might need to intervene to correct the situation.



Organization Table – Add a New Value search page



Using the Organization Table page (EXT_ORG_TABLE) to add a new record

1. Enter at least the required data--Effective Date, Status, Description, Organization Type, and Proprietorship on the Organization Table page to add a new record.

Warning! If you select *Save* prior to completing the required data, you must use the *Correct History* mode to continue entering or modifying the effective-dated data.

---

2. Select *Save.*

   The system assigns the next available unique organization ID to the record and adds it to your database.

See Also

Chapter 11, "Setting Up Organization Data," page 97

Chapter 34, "Managing Organization Data," Using Organization Search, page 447

Creating an Organization Record

This section discusses how to:

- Identify the organization.
- Identify the primary contact and department.

- Identify the organization as a school.
- Identify the organization as a vendor.

Prerequisites

Before adding an organization to your database, set up organization groups and types, and set up organization departments and contacts. If the organization is a school, you will also want to make sure that external subjects and terms are also set up.

See Also

Chapter 11, "Setting Up Organization Data," page 97

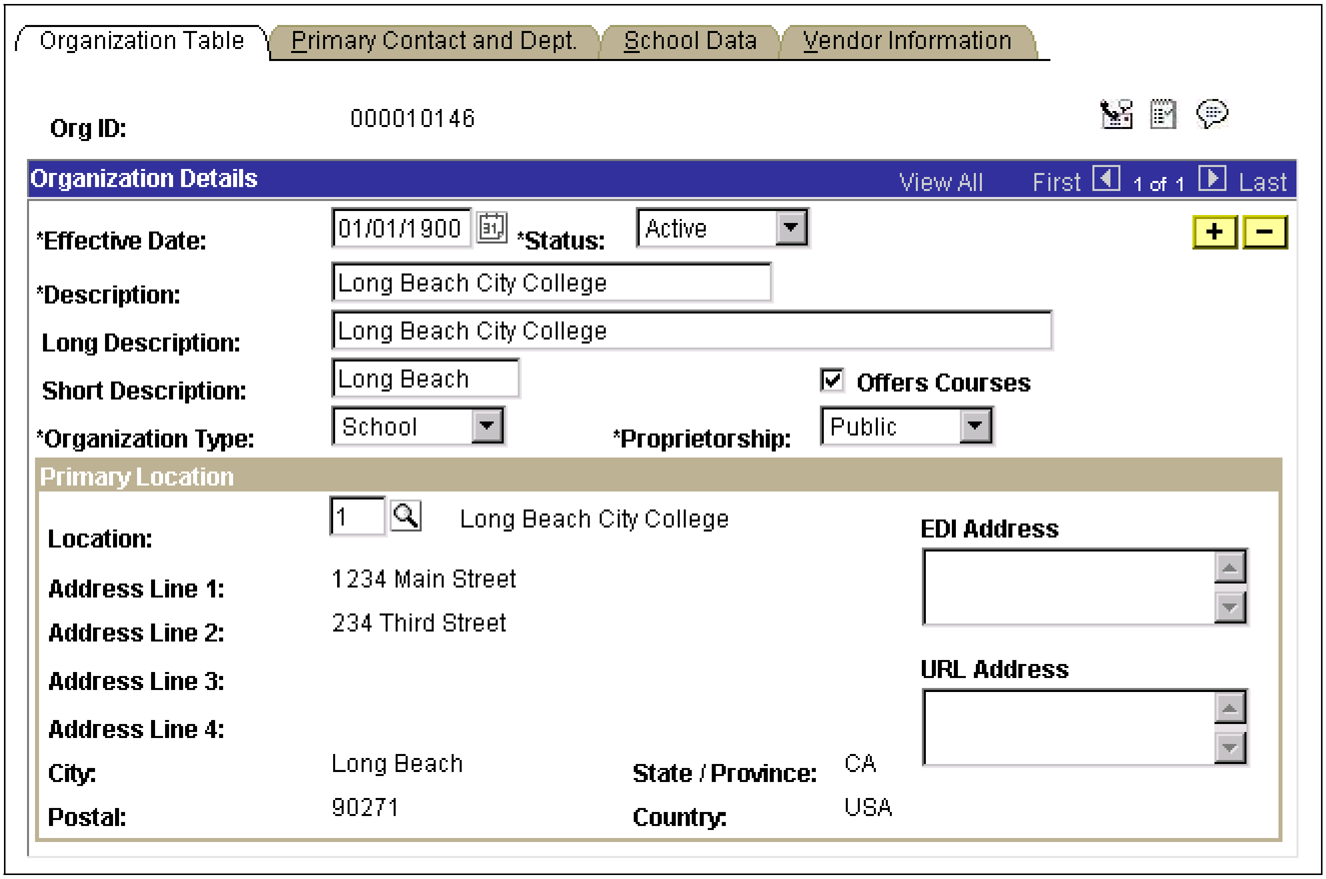
Pages Used to Create an Organization Record

Page Name	Object Name	Navigation	Usage
Organization Table	EXT_ORG_TABLE	• Build Community, Organization Data, Use, Organization Table, Organization Table • Build Community, Organization Data, Use, Organization Table OUAC, Organization Table • Manage Student Financials, Administer Payment Plans, Use, Organization Table, Organization Table • Manage Contributor Relations, Manage Organizations, Use, Organization Table, Organization Table	Identify the organization.

Page Name	Object Name	Navigation	Usage
Primary Contact and Department	EXT_ORG_PRIM_INFO	• Build Community, Organization Data, Use, Organization Table, Primary Contact and Dept. • Build Community, Organization Data, Use, Organization Table OUAC, Prim Contact and Dept • Manage Student Financials, Administer Payment Plans, Use, Organization Table, Primary Contact and Dept. • Manage Contributor Relations, Manage Organizations, Use, Organization Table, Primary Contact and Dept.	Identify the department and persons that your institution should contact for an organization.
School Data	EXT_ORG_SCHL_DATA	• Build Community, Organization Data, Use, Organization Table, School Data • Build Community, Organization Data, Use, Organization Table OUAC, School Data • Manage Student Financials, Administer Payment Plans, Use, Organization Table, School Data • Manage Contributor Relations, Manage Organizations, Use, Organization Table, School Data	Enter data that applies to an organization that offers courses.
Vendor Information	EXT_ORG_VNDR_INFO	• Build Community, Organization Data, Use, Organization Table, Vendor Information • Manage Student Financials, Administer Payment Plans, Use, Organization Table, Vendor Information • Manage Contributor Relations, Manage Organizations, Use, Organization Table, Vendor Information	Identify an organization as a vendor.

Identifying the Organization

Access the Organization Table page.



Organization Table page

Note. When you are creating the record for the first time and you enter a description in the Description field and exit the field, the system automatically enters *Long Description, Short Description, Organization Type* and *Proprietorship* field values. You can override these values.

Offers Courses

When selected, indicates that this organization offers courses, whether or not those course offerings are central to the organization's mission. This makes entering data on the School Data page possible.

Organization Type

The type of organization *(Business, Non-Profit, Other,* or *School)* that describes this organization.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Proprietorship

The type of primary owner or funding source *(Other, Private, Public,* or *Religious)* of this organization.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Primary Location

If you are creating this organization record for the first time, primary locations are unavailable. Assign locations to the organization after you create and save the record. When the record exists, and you have set up locations on the Organization Locations page, return to the Organization Table page to indicate the primary location.

Location This location's number from the Organization Locations page.

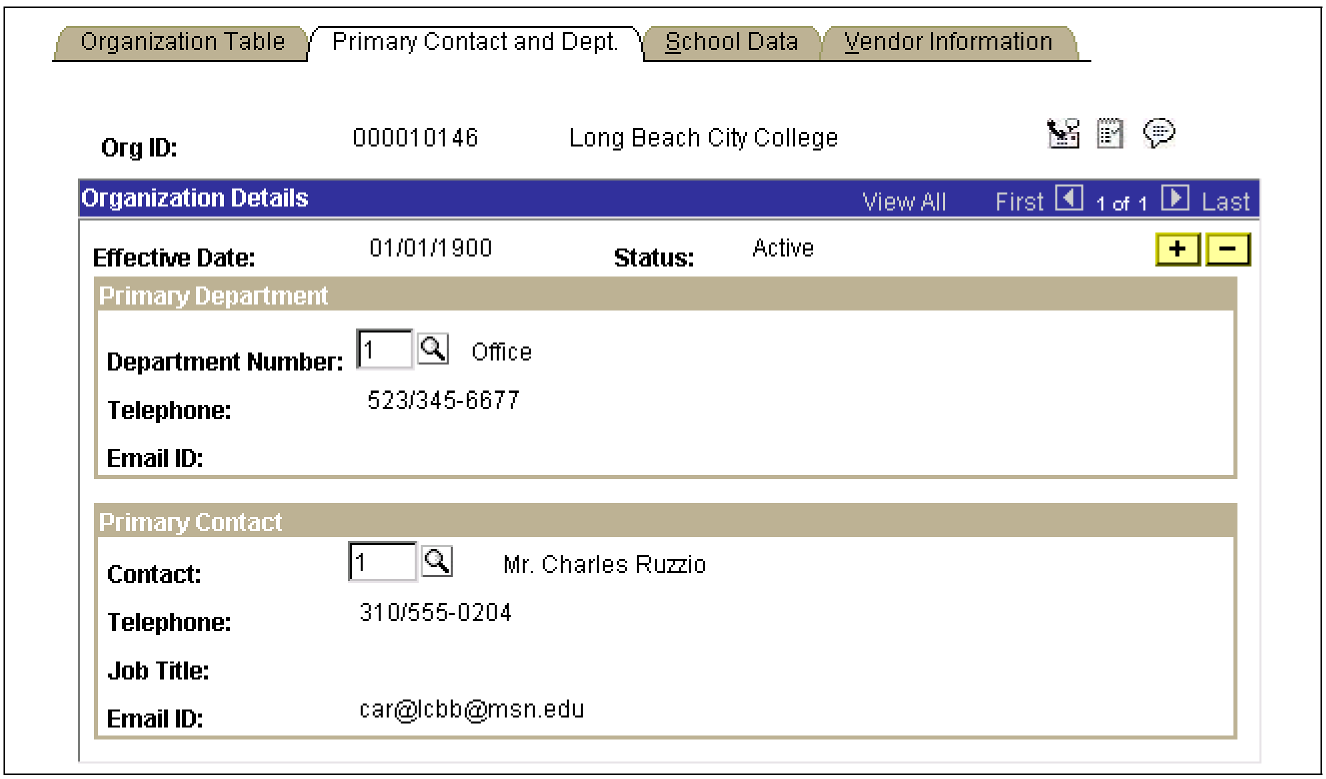
When you select the location number and exit the field, the system automatically displays the associated EDI (Electronic Data Interchange) and URL (Uniform Resource Locator) addresses for you.

EDI Address The EDI (Electronic Data Interchange) address for this location

URL Address The URL (Uniform Resource Locator) web address for this location.

Identifying the Primary Contact and Department

Access the Primary Contact and Department page.



Organization Table | Primary Contact and Dept. | School Data | Vendor Information

Org ID: 000010146 Long Beach City College

Organization Details View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active

Primary Department

Department Number: 1 Office

Telephone: 523/345-6677

Email ID:

Primary Contact

Contact: 1 Mr. Charles Ruzzio

Telephone: 310/555-0204

Job Title:

Email ID: car@lcbb@msn.edu

Primary Contact and Department page

Primary Department

If you are creating this organization record for the first time, primary contact persons are unavailable. Assign contacts to the organization after you create and save the record. When the record exists, and you have set up contacts on the Organization Contacts page, return to the Primary Contact and Department. page and indicate the primary contact persons here.

Department Number This contact department's number from the Organization Departments page.

When you select the department number and exit the field, the system automatically displays the associated preferred telephone and email address.

Telephone The department's preferred phone number.

Email ID The department's email address.

Primary Contact

If you are creating this organization record for the first time, primary contact persons are not available. You must assign contacts to the organization after you create and save the record in your database. When the record exists, and you have set up contacts on the Organization Contacts page, you can come back and select from those contacts to indicate the primary contact persons here.

Contact This contact person's number from the Organization Contacts page.

When you select the contact person's number and exit the field, the system automatically displays the associated preferred telephone number, job title, and email address.

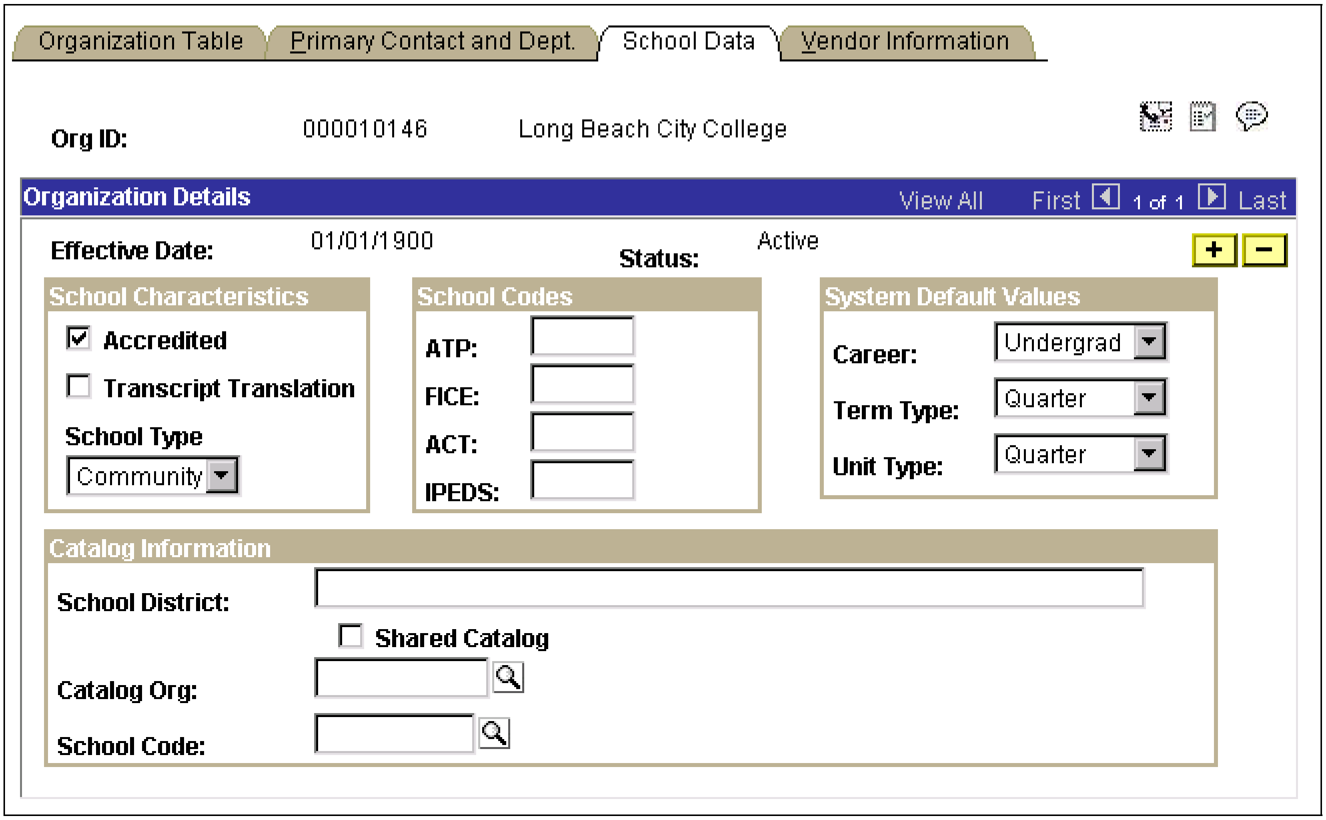
Telephone This contact person's preferred telephone number.

Job Title This contact person's job title.

Email ID This contact person's email address.

Identifying the Organization as a School

Access the School Data page.



School Data page

School Characteristics

Accredited When selected, indicates that this school is accredited.

Transcript Translation When selected, indicates that transcripts from this school are in a foreign language and must be translated.

School Type The type, from the School Type Table page, that describes this school.

See *PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook*, “Setting Up Prospects,” Setting Up School Types.

Warning! You must use the School Type Table setup page under Design Admissions to set up or modify school type values for PeopleSoft Student Administration Solutions pages. PeopleSoft Human Resources Management also uses school types, but these are defined by the SCHOOL_TYPE values assigned in the PS translate table. If you modify the translate values on the PS translate table, you will not see your changes on the Student Administration Solutions pages.

School Codes

ATP The ATP code for this school.

FICE The FICE code for this school.

ACT The ACT code for this school.

IPEDS The IPEDS code for this school.

System Default Values

Career The default career level that is associated with this organization.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Term Type The default term type that is associated with this organization.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Unit Type The default credit or term type that further describes the term type associated with this organization.

PeopleSoft Recruiting and Admissions uses this field for information only. For example, your admissions office might describe the external term as having a *Quarter* term unit type with a *No Credit* unit type value.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Catalog Information

School District The district in which this organization is located.

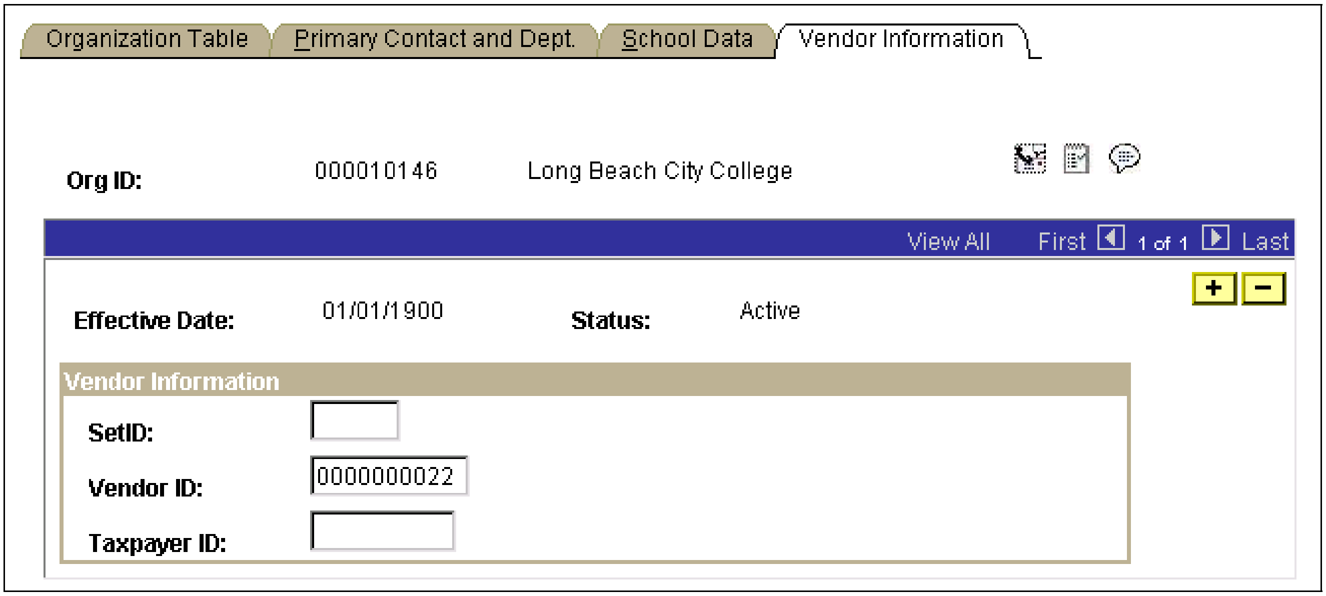
Shared Catalog When selected, indicates that this organization participates in a shared catalog with another school.

Catalog Organization The secondary school with which this organization shares a catalog.

School Code The code for the higher education institution with which this organization shares a catalog.

Identifying the Organization as a Vendor

Access the Vendor Information page.



Vendor Information page

SetID — The setID of the department at your institution that does business with or is responsible for paying the bills from this vendor.

Vendor ID — The number or other descriptor that your institution uses for this vendor

Taxpayer ID — This vendor’s taxpayer identification number.

Entering School Related Data

This section discusses how to:

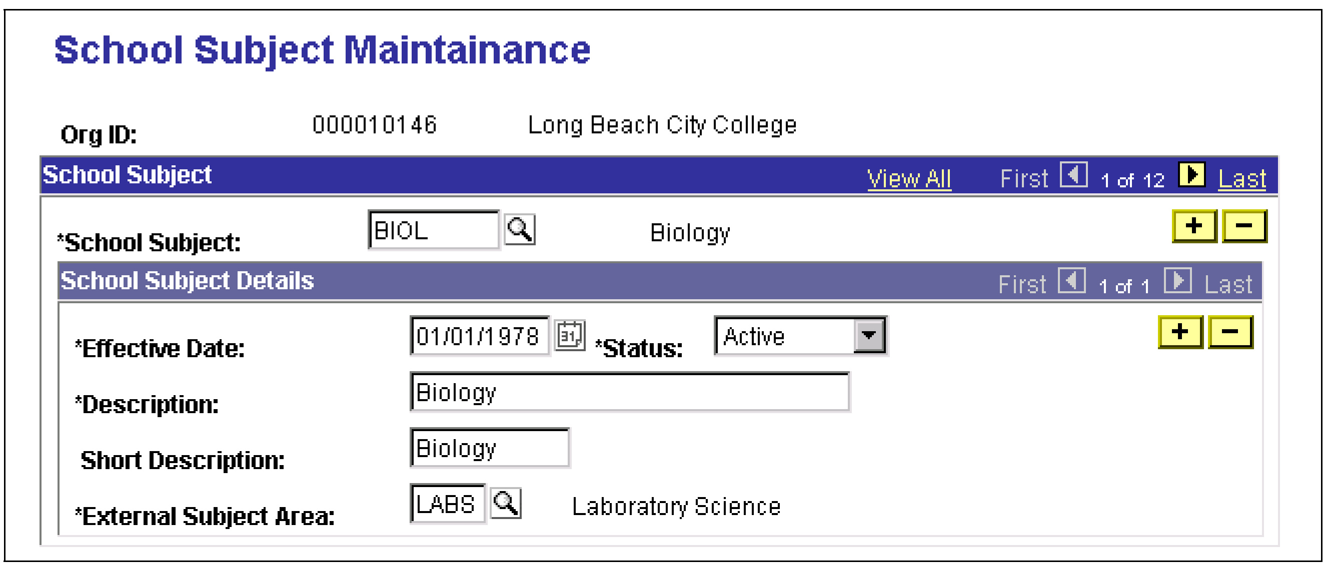
- Enter subjects offered by the school.
- Enter the courses offered within a subject area.

Pages Used to Enter School Related Data

Page Name	Object Name	Navigation	Usage
School Subject Maintenance	SCHOOL_SUBJECTS	• Build Community, Organization Data, Use, School Subject Maintenance, School Subject Maintenance • Manage Student Records, Process Transfer Credit, Setup, School Subject Maintenance, School Subject Maintenance	Enter subject areas offered by the school and relate them to subject areas that your institution offers.
School Course Classification	SCHOOL_COURSES	• Build Community, Organization Data, Use, School Course Classification, School Course Classification • Manage Student Records, Process Transfer Credit, Setup, School Course Classification, School Course Classification	Enter the courses offered for each of the organization's subject areas.

Entering Subjects Offered by the Organization

Access the School Subject Maintenance page.



School Subject Maintenance page

School Subject

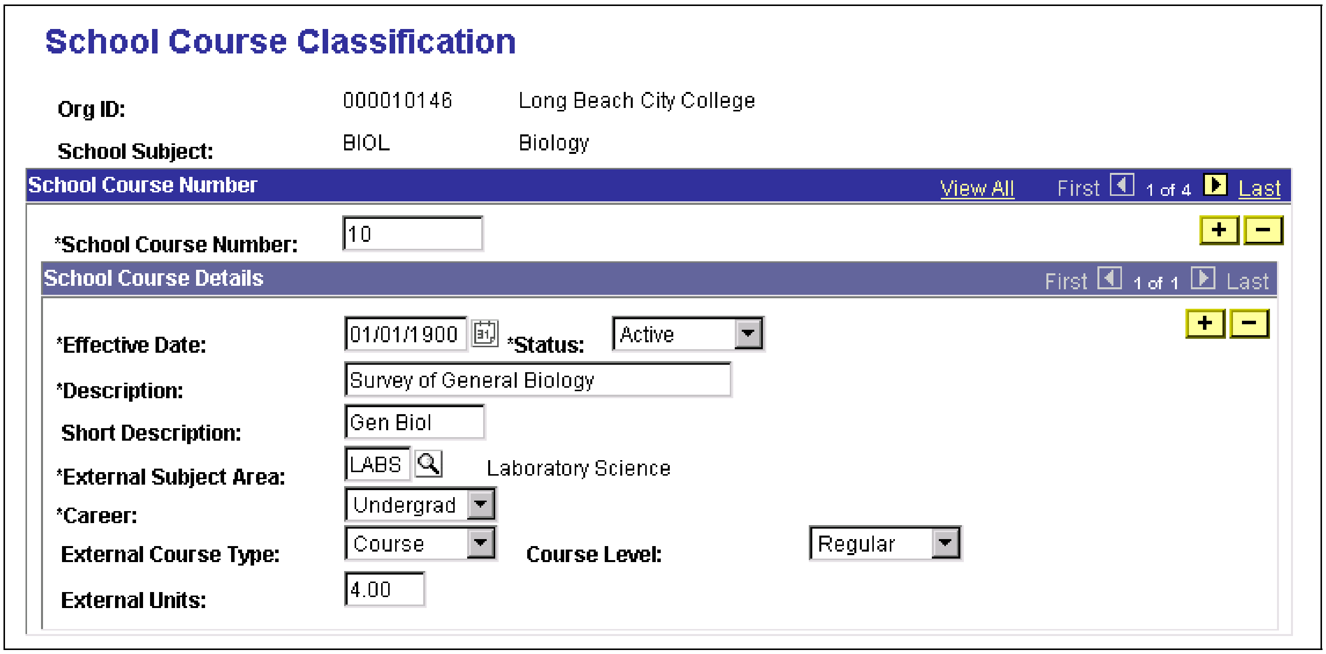
School Subject The subject offered by your institution for which you want to track the equivalent subject at an external school.

School Subject Details

External Subject Area The broad external subject area, from the External Subject Table page, that encompasses this subject at your institution.

Entering the Courses Offered within a Subject Area

Access the School Course Classification page.



School Course Classification page

School Course Number

School Course Number The number of the external course, usually the catalog number.

School Course Details

External Subject Area The code, from the External Subjects Table page, that describes the subject area of this external course. When courses have different names but are similar in subject, for example Chemistry and Biology, you can represent both by the single subject that you select here, such as LABS (for Laboratory Science).

Career The career level (for example, *Undergraduate, Graduate,* or *PostDoc*) of this external course.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Course Level The level (for example, *Freshman, Graduate,* or *Honors*) at which this course is offered.

Values for this field are delivered with your system as translate values. You can modify these translate values.

External Units	The number of units offered by this external course.

Entering Affiliations with Organizations

This section discusses how to identify organization affiliation details.

Prerequisites

Before entering affiliation information, set up GPA types, grading schemes, grading bases, and transcript details.

See Also

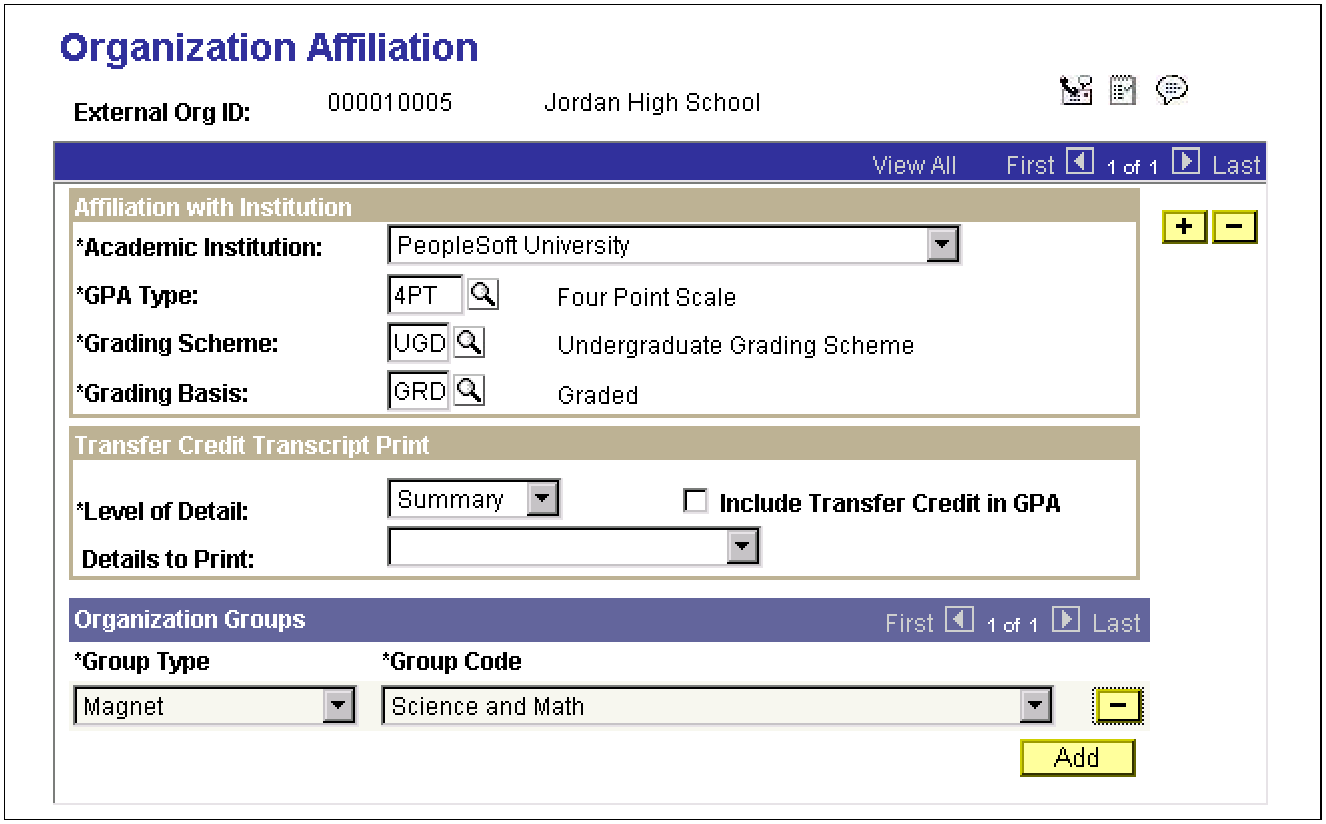
PeopleSoft 8 SP1 Student Records PeopleBook, "Producing Transcripts"

Page Used to Enter Affiliations with Organizations

Page Name	Object Name	Navigation	Usage
Organization Affiliation	EXT_ORG_AFFLTN	• Build Community, Organization Data, Use, Organization Affiliation, Organization Affiliation • Manage Student Financials, Administer Payment Plans, Use, Organization Affiliation, Organization Affiliation	Enter organization affiliations details.

Entering Organization Affiliation Details

Access the Organization Affiliation page.



Organization Affiliation page

Affiliation with Institution

Academic Institution The institution with which this organization is affiliated.

GPA Type The type of grade point average used by this organization.

Grading Scheme The type of grading scheme used by this organization.

Grading Basis The grading basis used by this organization.

Transfer Credit Transcript Print

Level of Detail The level of detail of the transfer credit to print on the transcript.

Summary: Indicates that the system prints the total transferred units and GPA on the student's transcript.

Detail: Indicates that the system prints the information that you specify in the Details to Print field.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Include Transfer Credit in GPA When selected, indicates that the system includes the transfer credit from this organization in the student's GPA.

Details to Print — This is available only when you select *Detail* in the Level of Detail field. Select the details that you want the system to print on the transcript: *None, External* and *Internal* (courses), *External Courses,* or *Internal Equivalent Courses.*

Organization Groups

Group Type — The type of group, from the Organization Group Table page, to which this organization belongs.

Group Code — The code associated with the specified group type, which further describes the group to which this organization belongs.

CHAPTER 34

Managing Organization Data

This chapter provides an overview of updating organization data and discusses how to:

- Enter organization location data.
- Enter organization department data.
- Enter organization contact data.
- Reviewing organization data.
- Using organization search.
- Managing organization IDs.
- Entering codes for external organization.

Understanding Organization Data

You can enter information about an organization's various locations, including its addresses, and phone numbers. You can enter as many locations for an organization as you need. After you enter this information, you can use it to specify the primary location for the organization.

You can enter information about an organization's various department names, locations, and email addresses. You can enter as many departments for an organization as you need. After you have entered this information, you can use it to specify the primary department for this organization on the Organization Table page.

You can enter information about the people that your institution should contact at an organization, including the person's name, job title, and telephone numbers. You can enter as many contacts for an organization as you need. After you have entered this information, you can use it to specify the primary contact for this organization on the Organization Table page.

You can review lists of all the locations, departments, and contacts for an organization.

Entering Organization Location Data

This section discusses how to:

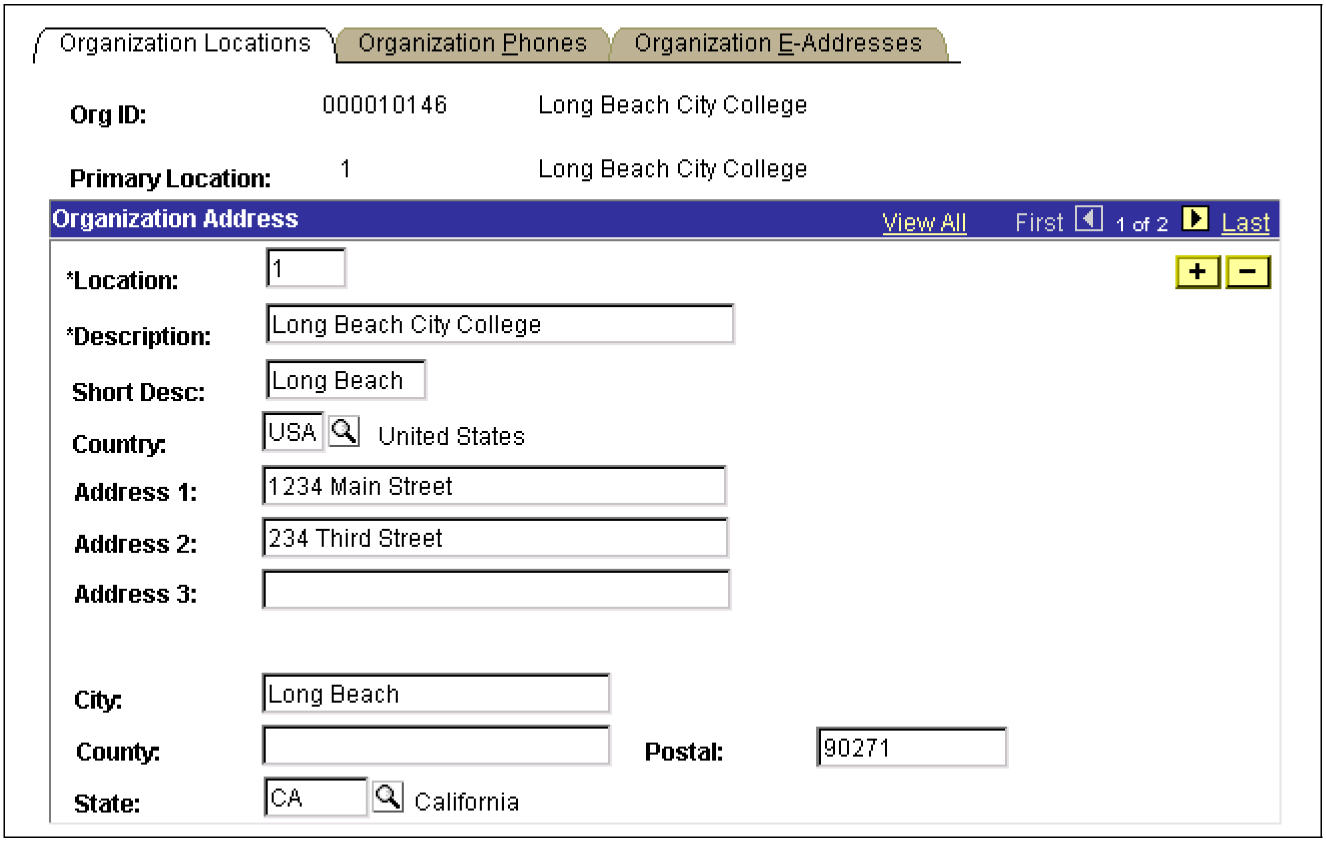
- Identify the organization locations.
- Identify the organization phone data.
- Identify the organization email data.

Pages Used to Enter Organization Location Data

Page Name	Object Name	Navigation	Usage
Organization Locations	ORG_LOCATIONS	• Build Community, Organization Data, Use, Organization Locations, Organization Locations • Manage Student Financials, Administer Payment Plans, Use, Organization Locations, Organization Locations • Manage Contributor Relations, Manage Organizations, Use, Organization Locations, Organization Locations	Enter or review the physical or mailing addresses for an organization.
Organization Phones	ORG_PHONES	• Build Community, Organization Data, Use, Organization Locations, Organization Phones • Manage Student Financials, Administer Payment Plans, Use, Organization Locations, Organization Phones • Manage Contributor Relations, Manage Organizations, Use, Organization Locations, Organization Phones	Enter or review the phone numbers for each location of an organization.
Organization E-Addresses	ORG_E_ADDR	• Build Community, Organization Data, Use, Organization Locations, Organization E-Addresses • Manage Student Financials, Administer Payment Plans, Use, Organization Locations, Organization E-Addresses • Manage Contributor Relations, Manage Organizations, Use, Organization Locations, Organization E-Addresses	Enter or review the electronic addresses for each location of an organization.

Identifying the Organization Location

Access the Organization Locations page.



Organization Locations page

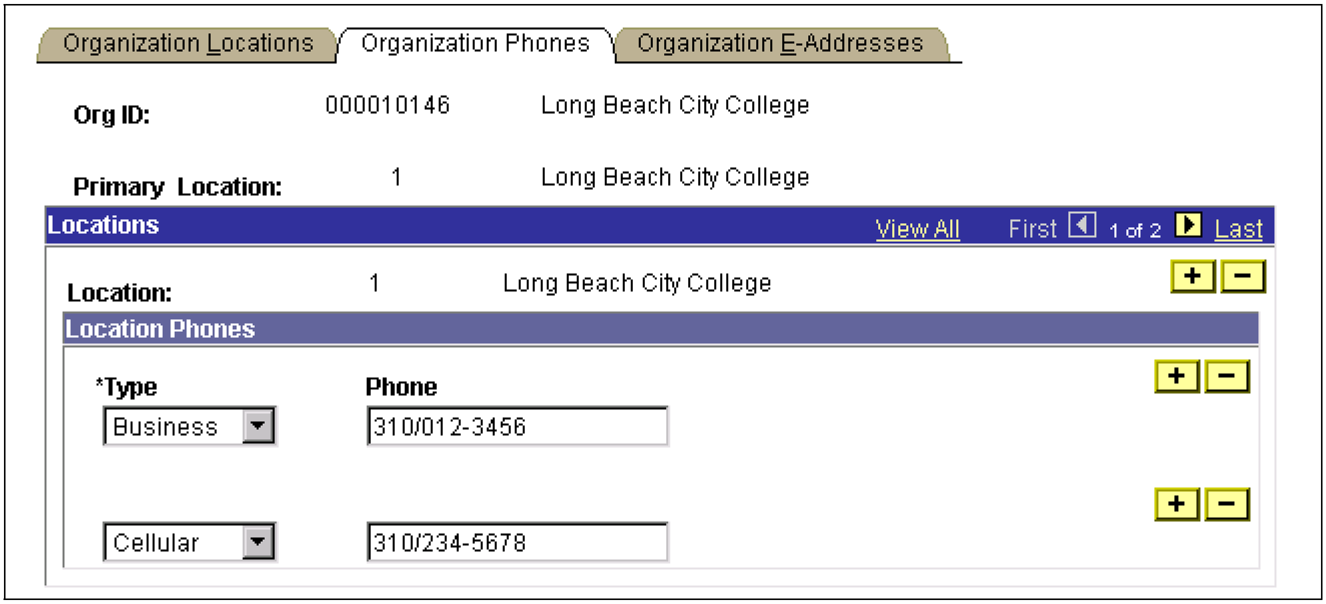
Location The number of this location in the list of locations for this organization.

The system automatically assigns the next sequential number to each location that you add. You can manually override these numbers to rearrange the order of the locations.

Country The country of this location. Labels in the address format for the specified country appear so that you can enter or review the address of this location.

Identifying the Organization Phone Data

Access the Organization Phones page.



Organization Phones page

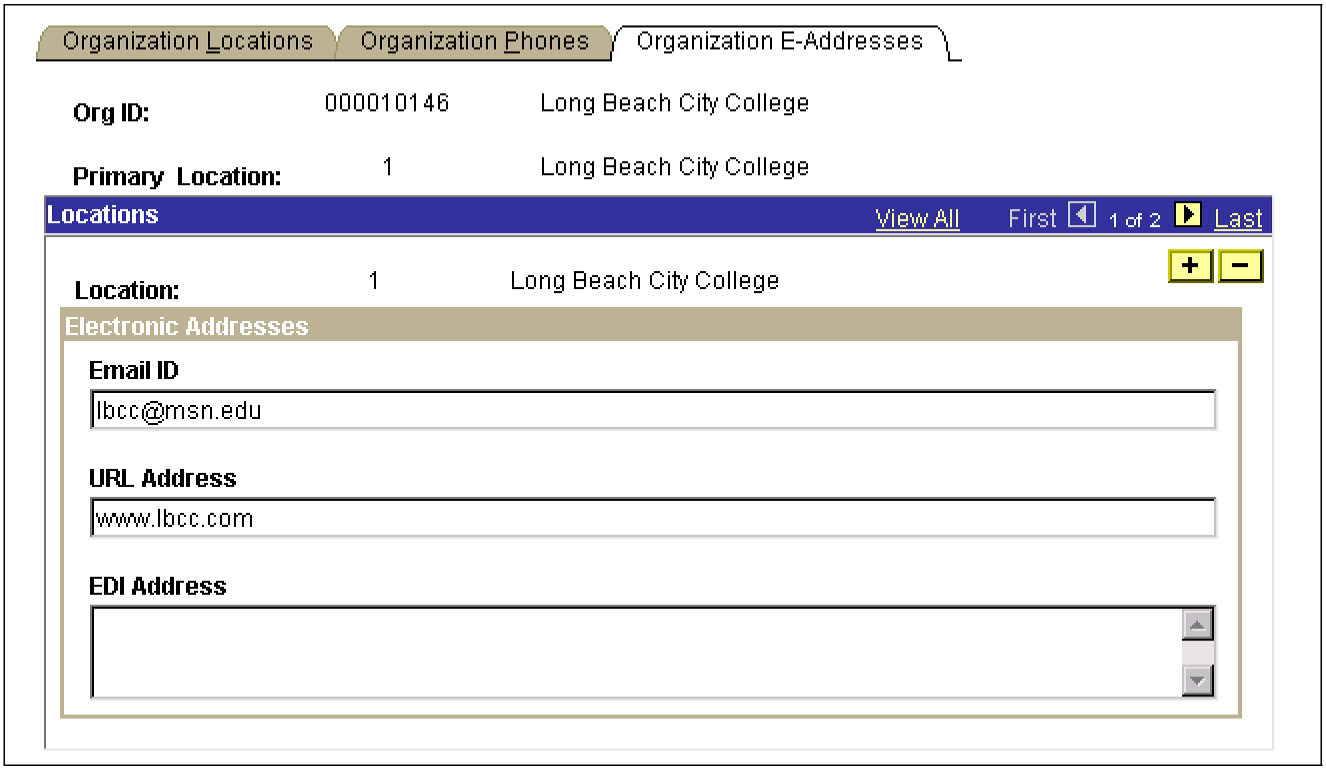
Type The type of phone number for this location.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Phone The telephone number for the specified type.

Identifying the Organization Email Data

Access the Organization E-Addresses page.



Organization E-Addresses page

Email ID — Enter the email address for this location of the organization.

URL Address — Enter the URL (Uniform Resource Locator) address of the World Wide web page for this location of the organization.

EDI Address — Enter the EDI (Electronic Data Interchange) address for this location of the organization.

Entering Organization Department Data

This section discusses how to:

- Identify an organization's departments.
- Identify the department location.
- Identify the department email data.

Prerequisites

Before entering or updating organization department data, you must enter the organization location data.

See Also

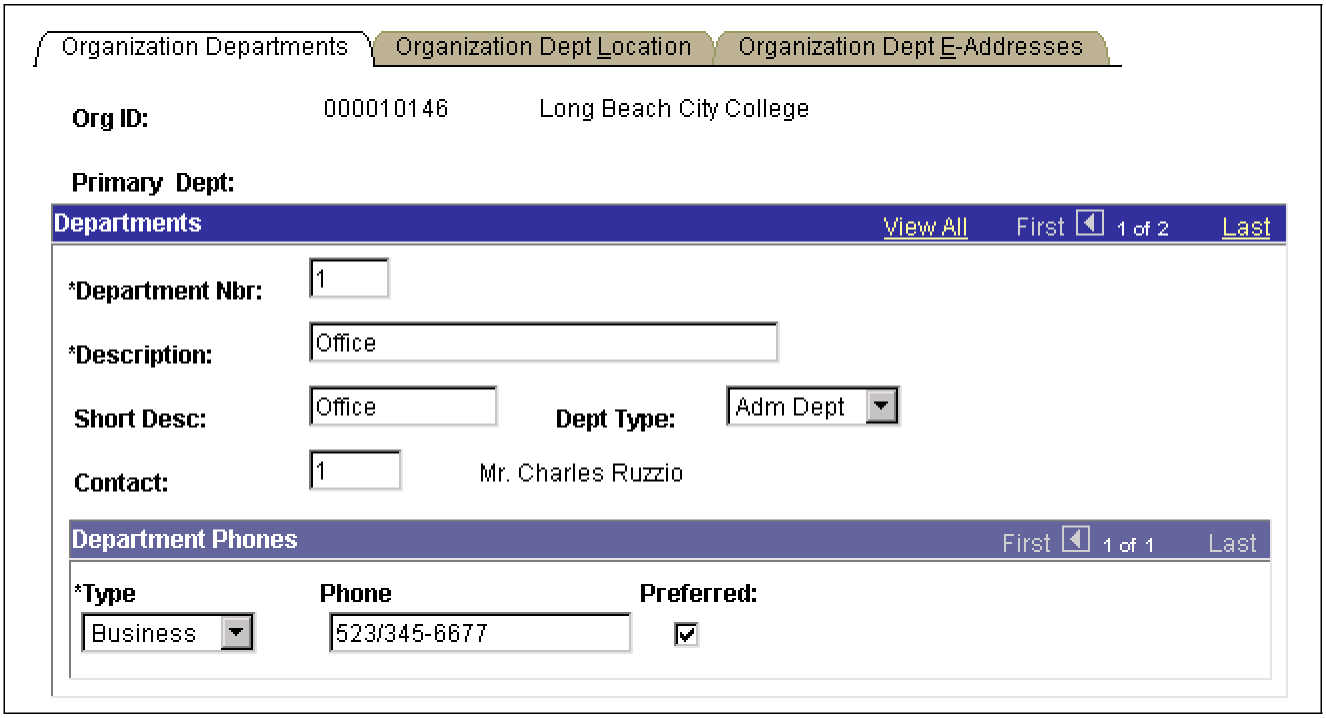
Chapter 34, "Managing Organization Data," Entering Organization Location Data, page 425

Pages Used to Enter Organization Department Data

Page Name	Object Name	Navigation	Usage
Organization Departments	ORG_DEPARTMENTS	• Build Community, Organization Data, Use, Organization Departments, Organization Departments • Manage Student Financials, Administer Payment Plans, Use, Organization Departments, Organization Departments • Manage Contributor Relations, Manage Organizations, Use, Organization Departments, Organization Departments	Enter or review the departments of an organization.
Organization Dept Location (organization department location)	ORG_DEPT_LOC	• Build Community, Organization Data, Use, Organization Departments, Organization Dept Location • Manage Student Financials, Administer Payment Plans, Use, Organization Departments, Organization Dept Location • Manage Contributor Relations, Manage Organizations, Use, Organization Departments, Organization Dept Location	Enter the location address for a department within an organization.
Organization Dept E-Addresses (organization department electronic addresses)	ORG_DEPT_E_ADDR	• Build Community, Organization Data, Use, Organization Departments, Organization Dept E-Addresses • Manage Student Financials, Administer Payment Plans, Use, Organization Departments, Organization Dept E-Addresses • Manage Contributor Relations, Manage Organizations, Use, Organization Departments, Organization Dept E-Addresses	Enter or review electronic addresses for a department within an organization, including email and URL addresses.

Identifying the Organization Departments

Access the Organization Departments page.



Organization Departments page

Department Number

The number of this department in the list of departments for this organization.

The system automatically assigns the next sequential number to each department that you add. You can manually override these numbers to rearrange the order of the departments.

Department Type

The type *(Academic* or *Administrative)* that describes this department.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Contact

The main contact, from the Organization Contacts page, for this department.

Note. You cannot select a contact for this department until contacts are entered on the Organization Contacts page.

Type

The type of phone number for this department.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Phone

The telephone number for the specified type for this department.

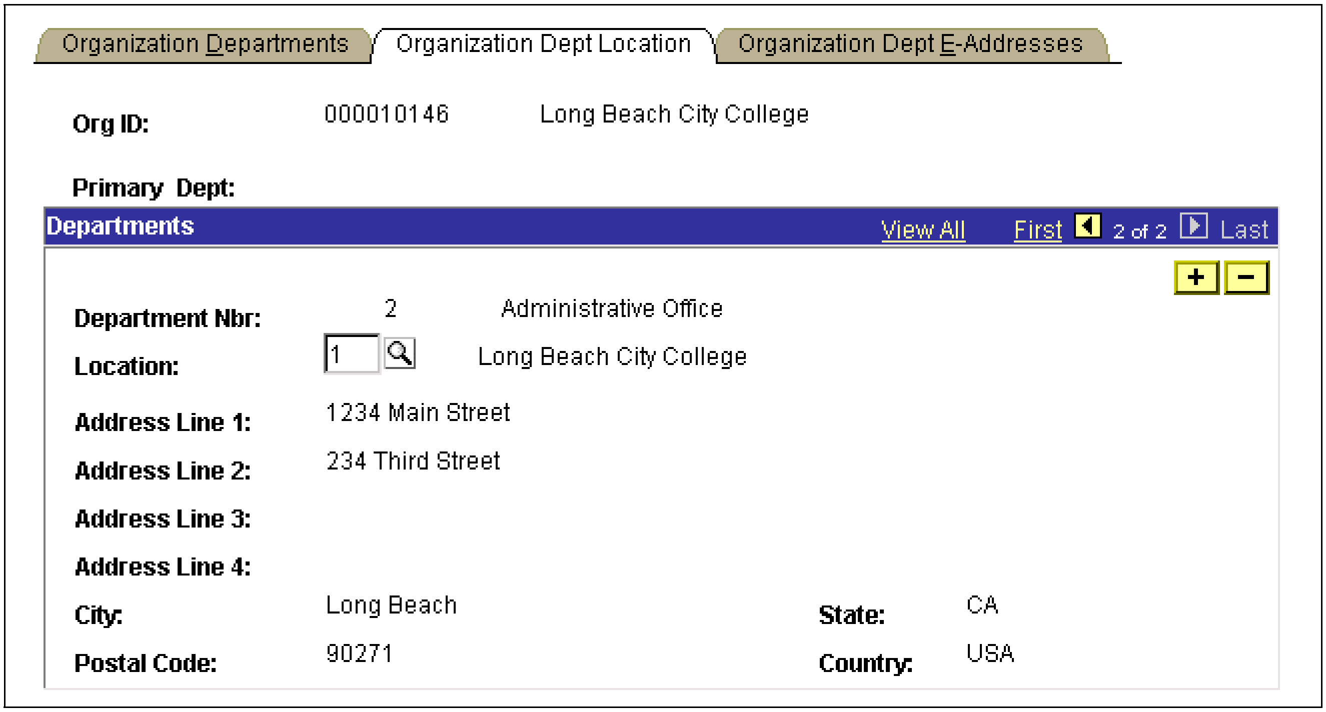
Preferred

When selected, indicates that this phone number is the preferred or primary phone number for this department.

This number appears as the preferred phone number when this department is selected as the primary department on the Primary Contact and Department page.

Identifying the Department Location Data

Access the Organization Dept Location page.

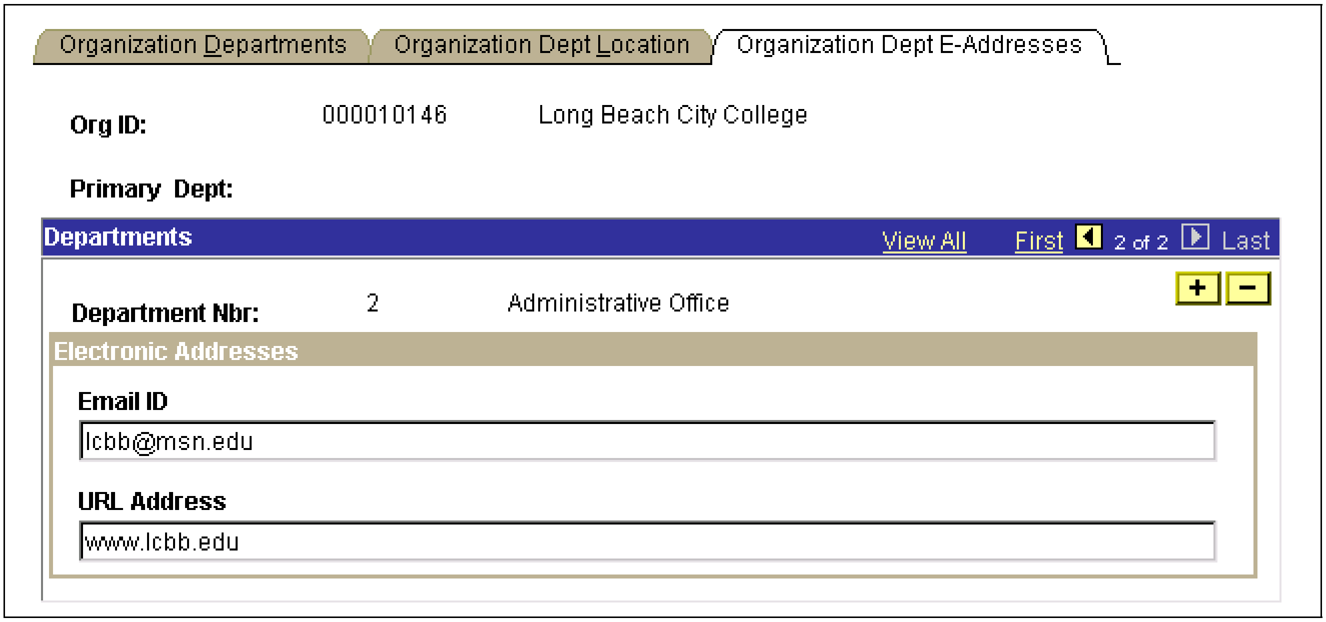


Organization Dept Location page

Location The location number, from the Organization Locations page, for this department's location. The system displays the address associated with the location selected.

Identifying the Department Email Data

Access the Organization Dept E-Addresses page.



Organization Dept E-Addresses page

Email ID	The email address for this department of the organization.
URL Address	The URL (Uniform Resource Locator) web address for this department of the organization.

Entering Organization Contact Data

This section discusses how to:

- Identify the organization's contacts.
- Identify the contact location.
- Identify the contact email data.

Prerequisites

Before entering or updating organization contact data, enter the organization department data.

See Also

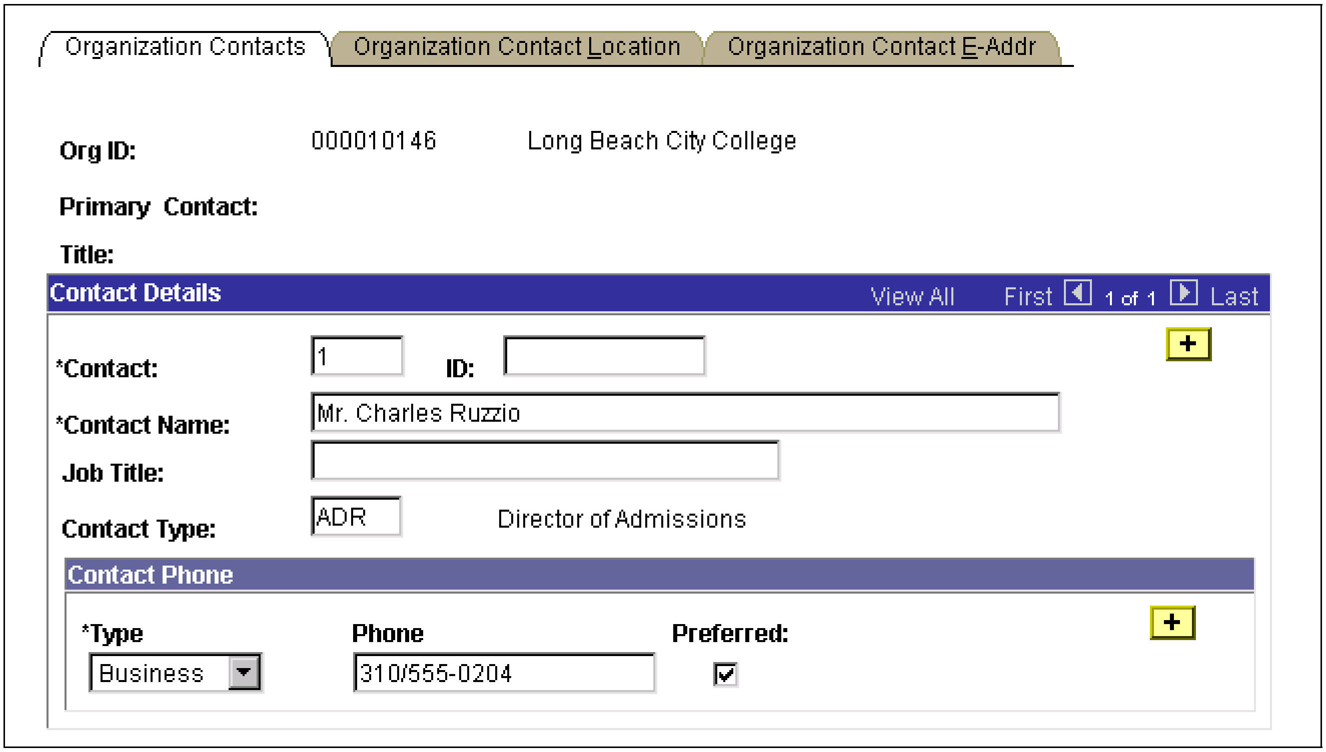
Chapter 34, "Managing Organization Data," Entering Organization Department Data, page 429

Pages Used to Enter Organization Contact Data

Page Name	Object Name	Navigation	Usage
Organization Contacts	ORG_CONTACTS	• Build Community, Organization Data, Use, Organization Contacts, Organization Contacts • Manage Student Financials, Administer Payment Plans, Use, Organization Contacts, Organization Contacts • Manage Contributor Relations, Manage Organizations, Use, Organization Contacts, Organization Contacts	Enter or review contact information for an organization.
Organization Contact Location	ORG_CONTACTS_LOC	• Build Community, Organization Data, Use, Organization Contacts, Organization Contact Location • Manage Student Financials, Administer Payment Plans, Use, Organization Contacts, Organization Contact Location • Manage Contributor Relations, Manage Organizations, Use, Organization Contacts, Organization Contact Location	Specify or review the location of an organization contact.
Organization Contact E-Addr (organization contact electronic addresses)	ORG_CONTACT_E_ADDR	• Build Community, Organization Data, Use, Organization Contacts, Organization Contact E-Addr • Manage Student Financials, Administer Payment Plans, Use, Organization Contacts, Organization Contact E-Addr • Manage Contributor Relations, Manage Organizations, Use, Organization Contacts, Organization Contact E-Addr	Enter or review electronic addresses for a contact person at an organization, including email and URL addresses.

Identifying the Organization's Contacts Data

Access the Organization Contacts page.



Organization Contacts page

Contact Details

Contact The number of this contact person in the list of contacts for this organization.

The system automatically assigns the next sequential number to each contact that you add. You can manually override these numbers to rearrange the order of the contacts.

ID The ID of this contact person, if the person exists in your database.

Contact Name The name of this contact person.

If the person is in your database, the system automatically displays the person's name when you select the ID. If the person is not in your database, you must enter the name manually.

Job Title This contact person's job title.

Contact Type The type of contact (for example, *Teacher, Principal, Guidance Counselor,* or *Primary Contact*) from the Contact Type Table page.

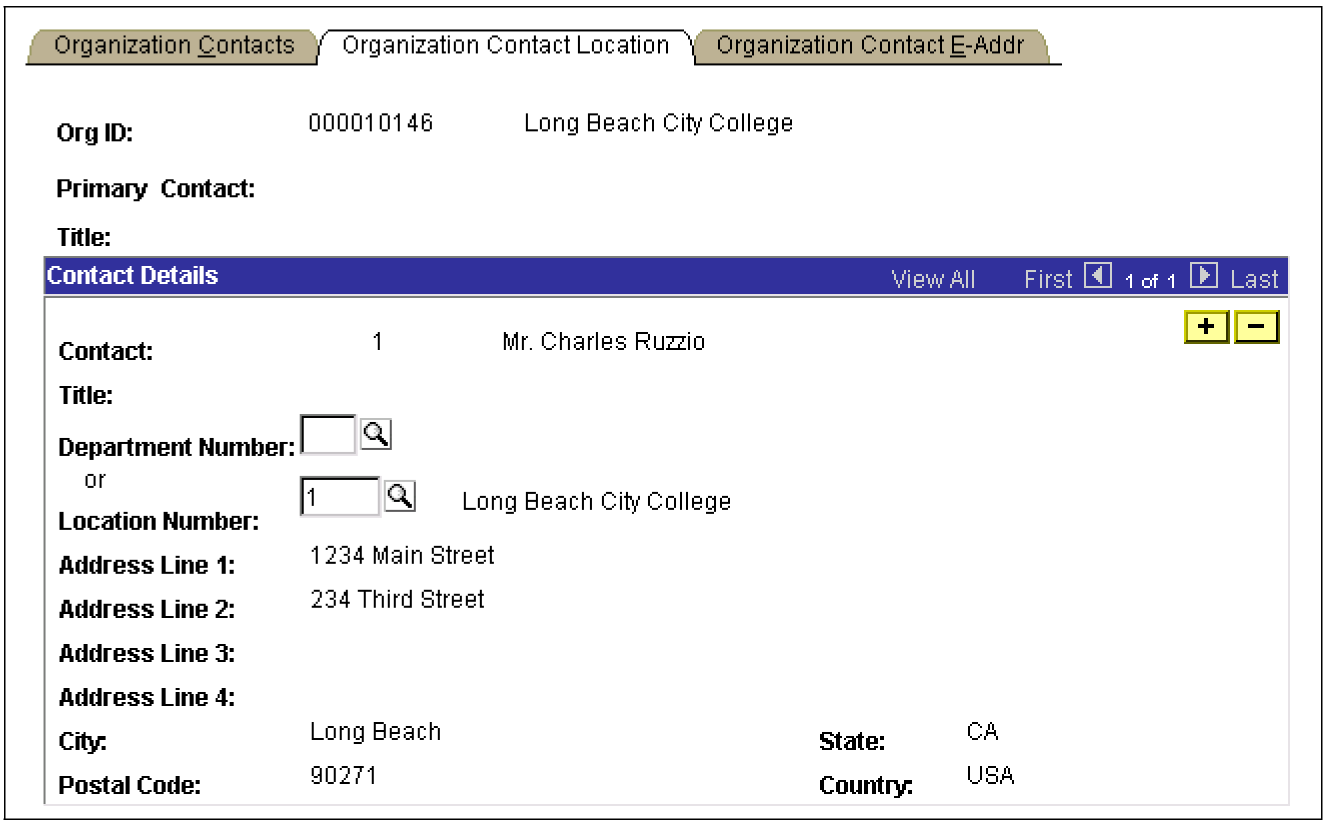
Contact Phone

Type The type of phone number for this contact.

	Values for this field are delivered with your system as translate values. You can modify these translate values.
Phone	The telephone number for the specified type for this contact.
Preferred	When selected, indicates that this phone number is the preferred or primary phone number for this contact person. This number appears for this person if he or she is selected as the primary contact on the Primary Contact and Department page.

Identifying the Contact Location

Access the Organization Contact Location page.



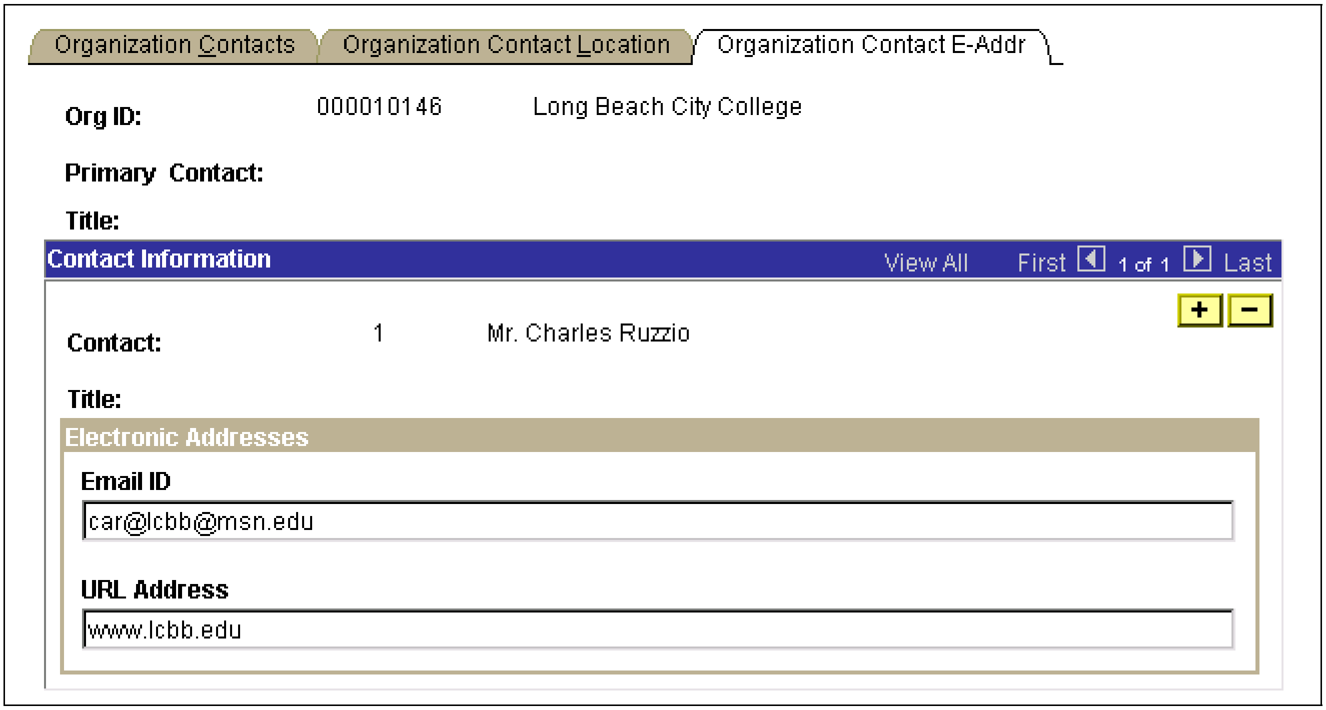
Organization Contact Location page

You can enter either the department number or the location number.

Department Number	The department number, from the Organization Departments page, for this contact's department. The system displays the address associated with the department selected.
Location Number	The location number, from the Organization Locations page, for this contact's location. The system displays the address associated with the location selected.

Identifying the Contact Email Data

Access the Organization Contact E-Addr page.



Organization Contact E-Addr page

Email ID Enter the email address for this contact person.

URL Address Enter the URL (Uniform Resource Locator) web address for this contact person.

Reviewing Organization Data

This section discusses how to:

- View locations data.
- View primary location data.
- View school data.
- View phones data.
- View departments data.
- View department location data.
- View department phone data.
- View contacts data.
- View contact phone data.
- View contact location data.
- View organizations by group types.

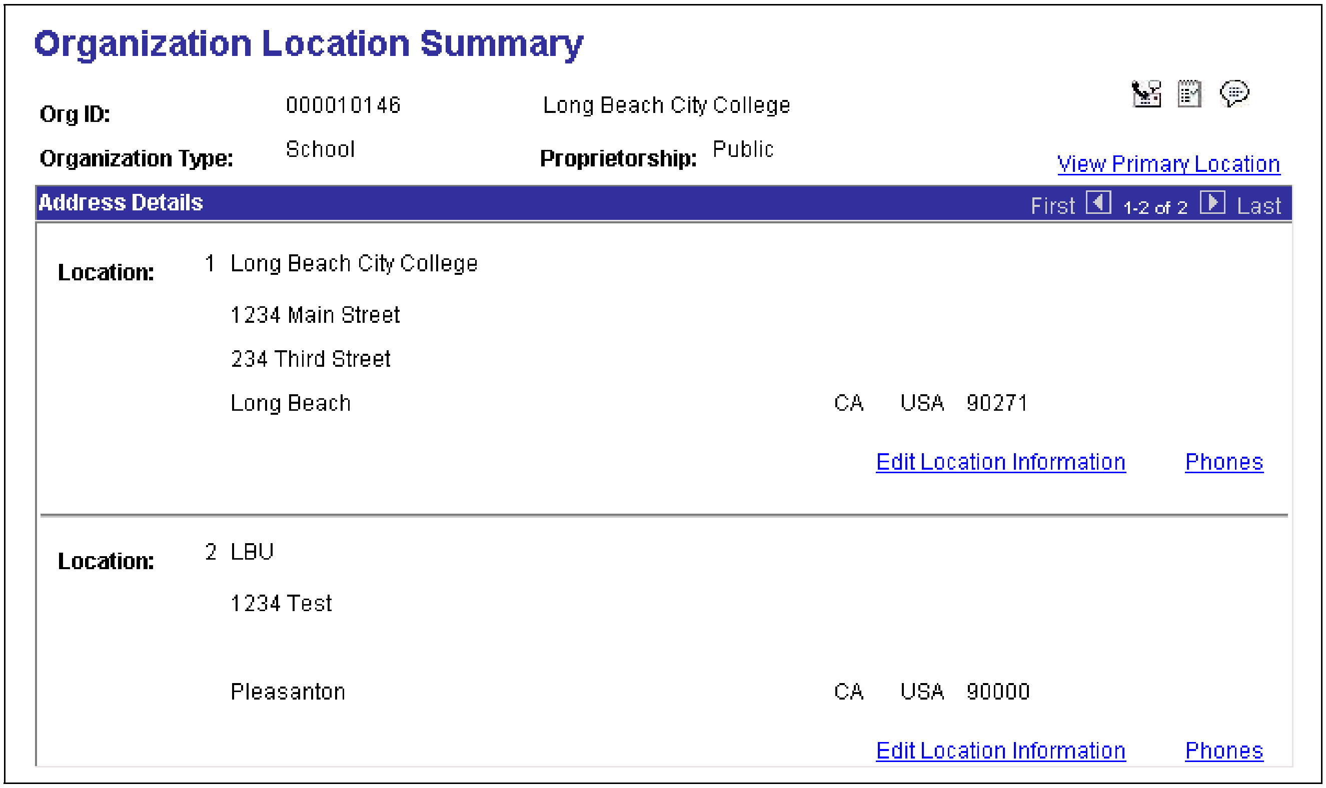
Pages Used to Review Organization Data

Page Name	Object Name	Navigation	Usage
Organization Location Summary	EXT_ORG_LOC_SUM	• Build Community, Organization Data, Inquire, Org Location Summary, Org Location Summary • Manage Student Financials, Administer Payment Plans, Inquire, Org Location Summary, Org Location Summary • Manage Contributor Relations, Manage Organizations, Inquire, Org Location Summary, Org Location Summary	Review all of the locations for an organization.
Organization Primary Location	EXT_ORG_PRIM_LOC	Click the View Primary Location link on the Organization Location Summary page.	View data for the primary location for an organization.
Organization School Information	SCHOOL_INFO	Click the School Information link on the Organization Primary Location page.	View the school characteristics of an organization location.
Organization Phone Information	EXT_ORG_LOC_PHN	Click the Phones link on the Organization Location Summary page.	View phone and electronic address information for an organization location.
Organization Department Summary	EXT_ORG_DEPT_SUM	• Build Community, Organization Data, Inquire, Org Department Summary, Department Summary • Manage Student Financials, Administer Payment Plans, Inquire, Org Department Summary, Department Summary • Manage Contributor Relations, Manage Organizations, Inquire, Org Department Summary, Department Summary	Review the departments for a specific organization.
Department Location Information	EXT_ORG_DEPT_LOC	Click the Location link on the Organization Department Summary page.	View the location information for a department at an organization.
Department Phone Information	EXT_ORG_DEPT_PHN	Click the Phone link on the Organization Department Summary page.	Review the telephone numbers for a department at an organization.

Page Name	Object Name	Navigation	Usage
Organization Contacts Summary	EXT_ORG_CNTCT_SUMM	• Build Community, Organization Data, Inquire, Org Contacts Summary, External Org Contacts • Manage Student Financials, Administer Payment Plans, Inquire, External Org Contacts, External Org Contacts • Manage Contributor Relations, Manage Organizations, Inquire, External Org Contacts, External Org Contacts	Review the contacts for a specific organization.
Contact Phone Information	EXT_ORG_CNTCT_PHN	Click the Phone link on the Organization Contact Summary page.	Review email address and telephone numbers for an organization contact.
Contact Location Information	EXT_ORG_CNTCT_LOC	Click the Location link on the Organization Contact Summary page.	Review location information for a contact at an organization.
Organization Groups Summary	ORG_GROUP_SUMM	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. • Build Community, Organization Data, Inquire, Org Groups Summary, Organization Groups Summary • Manage Student Financials, Administer Payment Plans, Inquire, Organization Groups, Organization Groups Summary • Develop Enrollment, Process Applications, Inquire, Organization Groups, Organization Groups Summary • Manage Student Records, Process Transfer Credit, Inquire, Schools By Group, Schools by Group	Review all organizations by group.

Viewing Locations Data

Access the Organization Location Summary page.



Organization Location Summary page

The Organization Location Summary page is for viewing purposes only. You cannot enter or modify data on this page.

View Primary Location Click to access the Organizations Primary Location page where you can view data for the primary location for this organization.

Edit Location Information Click to access the Organization Location page where you can edit or update data for this organization location.

Phones Click to access the Organization Phone Information page where you can view phone and electronic address information for this organization location.

Viewing Primary Location Data

Access the Organization Primary Location page.

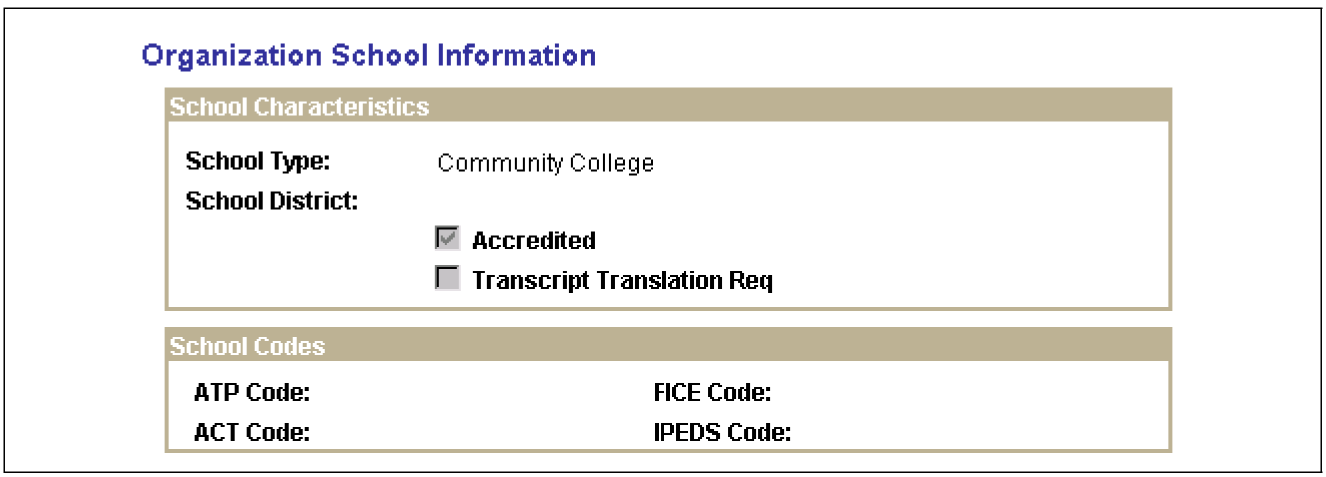
Organization Primary Location page

The Organization Primary Location page is for viewing purposes only. You cannot enter or modify data on this page.

School Information Click to access the Organization School Information page where you can view the school characteristics for this organization location.

Viewing School Data

Access the Organization School Information page.

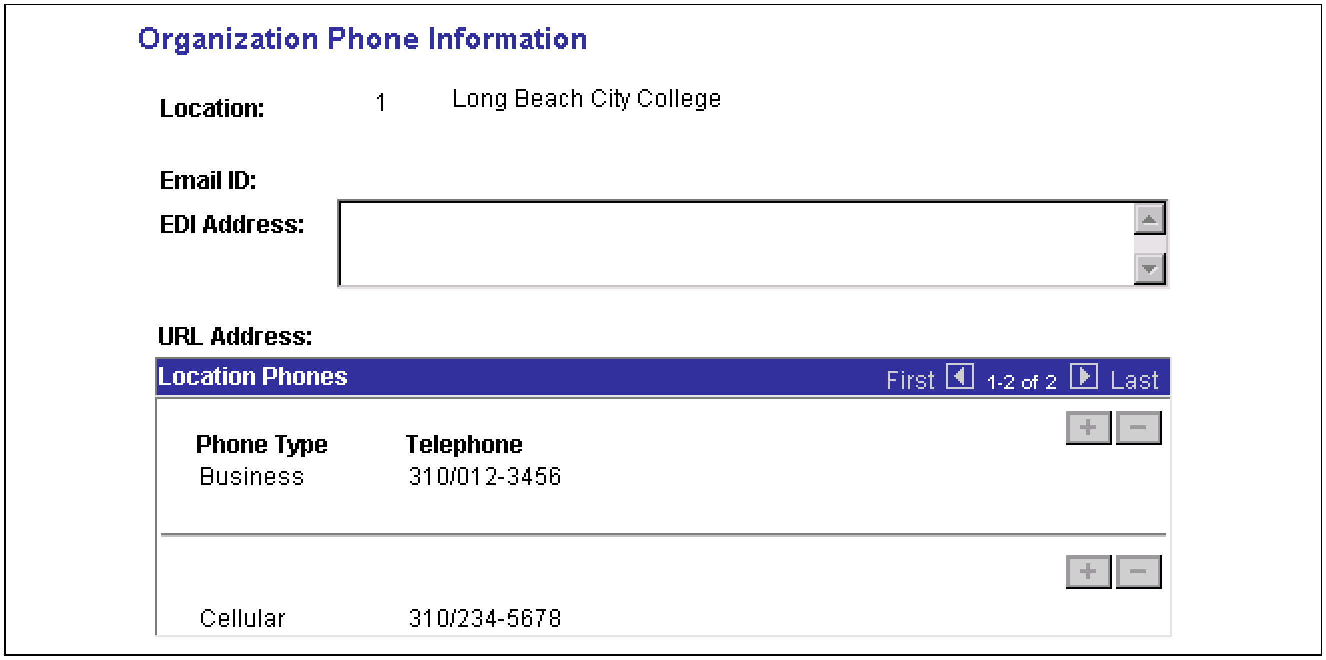


Organization School Information page

The Organization School Information page is for viewing purposes only. You cannot enter or modify data on this page. The information on this page is entered in the School Data page.

Viewing Phones Data

Access the Organization Phone Information page.

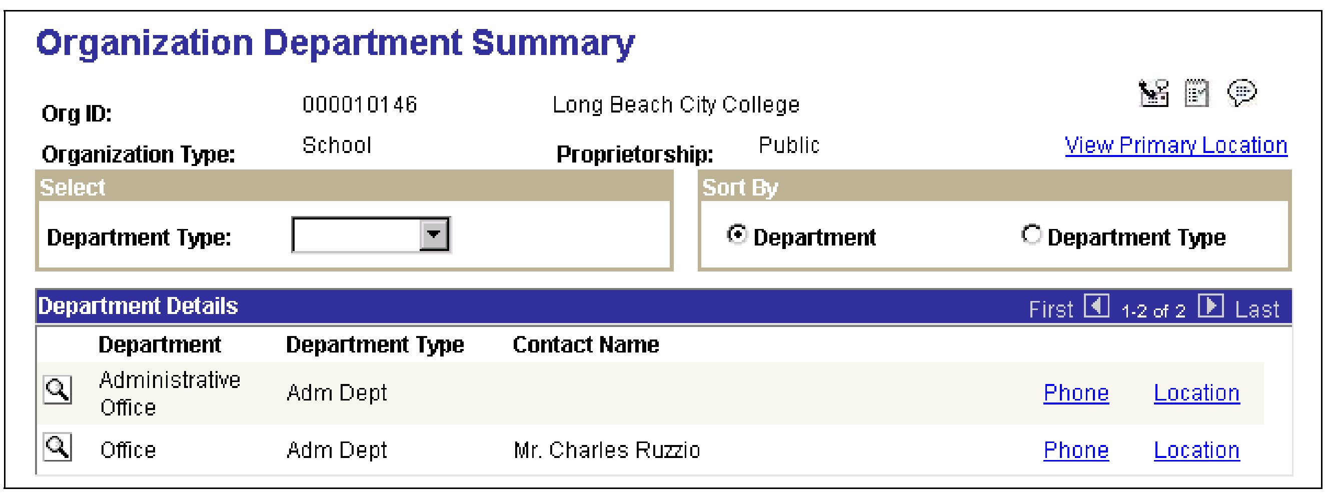


Organization Phone Information page

The Organization Phone Information page is for viewing purposes only. You cannot enter or modify data on this page.

Viewing Departments Data

Access the Organization Department Summary page.



Organization Department Summary page

View Primary Location Click to access the Organization Primary Location page where you can view data for the primary location for this organization.

Select

Department Type — The type of departments *(Academic* or *Administrative)* that you want to review. If you do not specify a department type, the system lists all the departments for this organization.

Sort By

Department — When selected, indicates that the system should sort the list of departments alphabetically by department.

Department Type — When selected, indicates that the system should sort the list of departments by department type.

Department Details

(edit department) — Click to access the Organization Departments page where you can edit or update data for this organization department.

Phones — Click to access the Department Phone Information page where you can view phone and electronic address information this organization department.

Location — Click to access the Department Location Information page where you can view the location data for this department.

Viewing Department Location Data

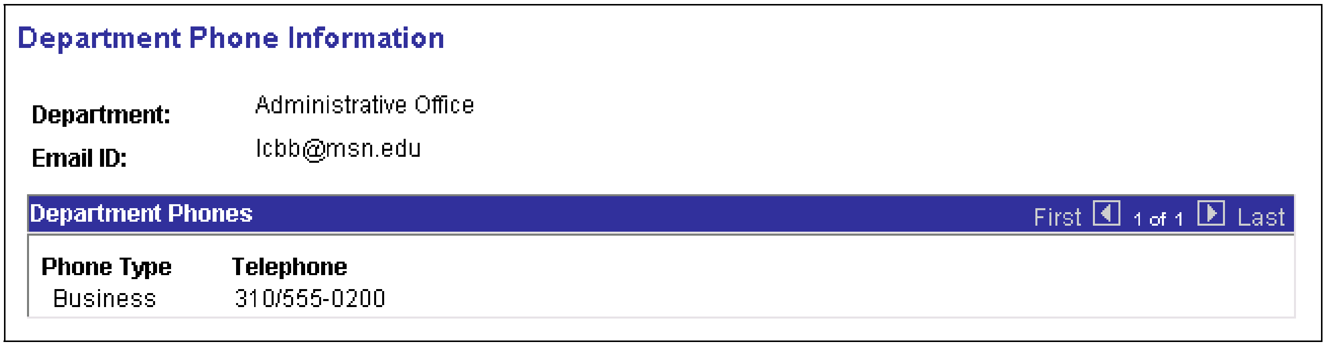
Access the Department Location Information page.

Department Location Information page

The Department Location Information page is for viewing purposes only. You cannot enter or modify data on this page.

Viewing Department Phone Data

Access the Department Phone Information page.

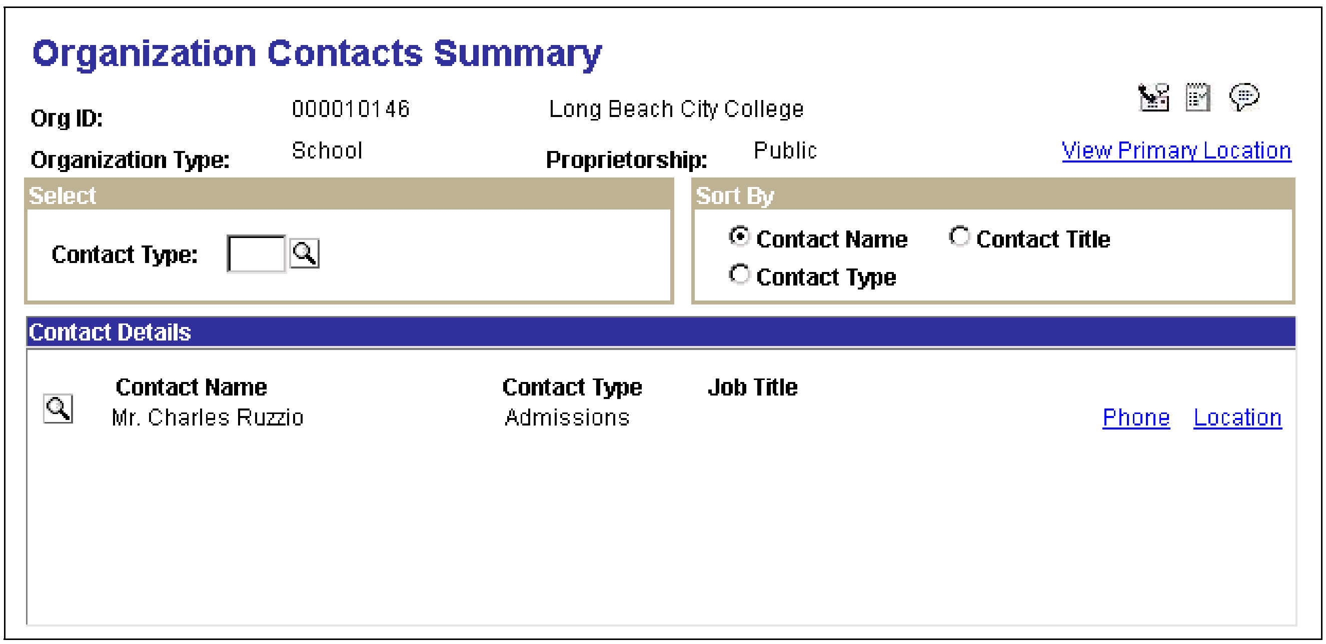


Department Phone Information page

Enter phone data for the department, as described in Entering Department Data for Organizations

Viewing Contacts Data

Access the Organization Contacts Summary page.



Organization Contacts Summary page

View Primary Location Click to access the Organization Primary Location page where you can view data for the primary location for this organization.

Select

Contact Type The type of contact to review (for example, *Teacher, Guidance Counselor,* or *Principal*). If you do not specify a contact type, the system lists all the contacts for this organization.

Sort By

Contact Name When selected, indicates that the system sorts the list of contacts alphabetically by name.

Contact Type When selected, indicates that the system sorts the list of contacts by contact type.

Contact Title When selected, indicates that the system sorts the list of contacts by job title.

Contact Details

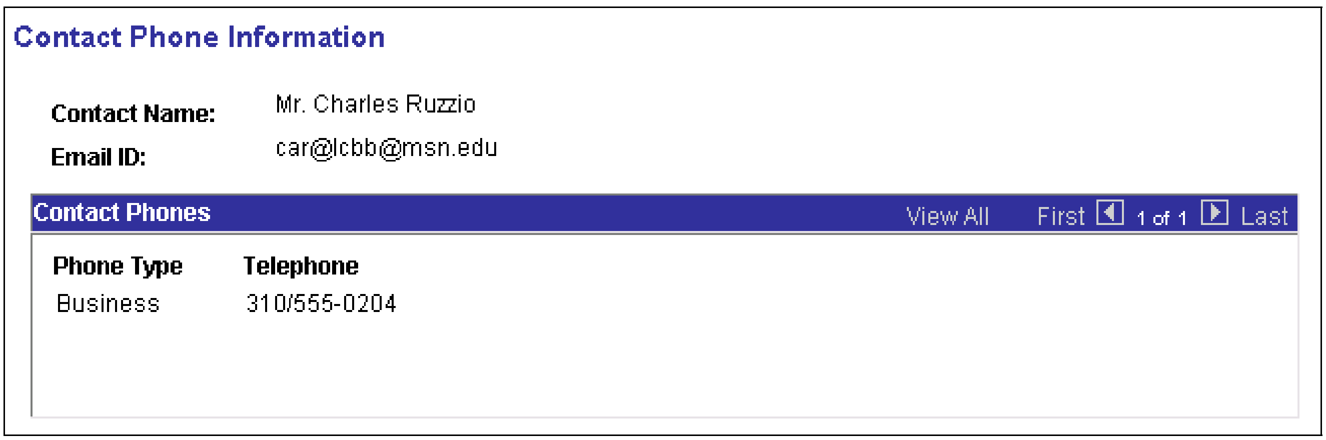
(edit contact) Click to access the Organization Contacts page where you can edit or update data for this organization contact.

Phones Click to access the Contact Phone Information page where you can view phone and electronic address information this organization contact.

Location Click to access the Contact Location Information page where you can view the location data for this contact.

Viewing Contact Phone Data

Access the Contact Phone Information page.

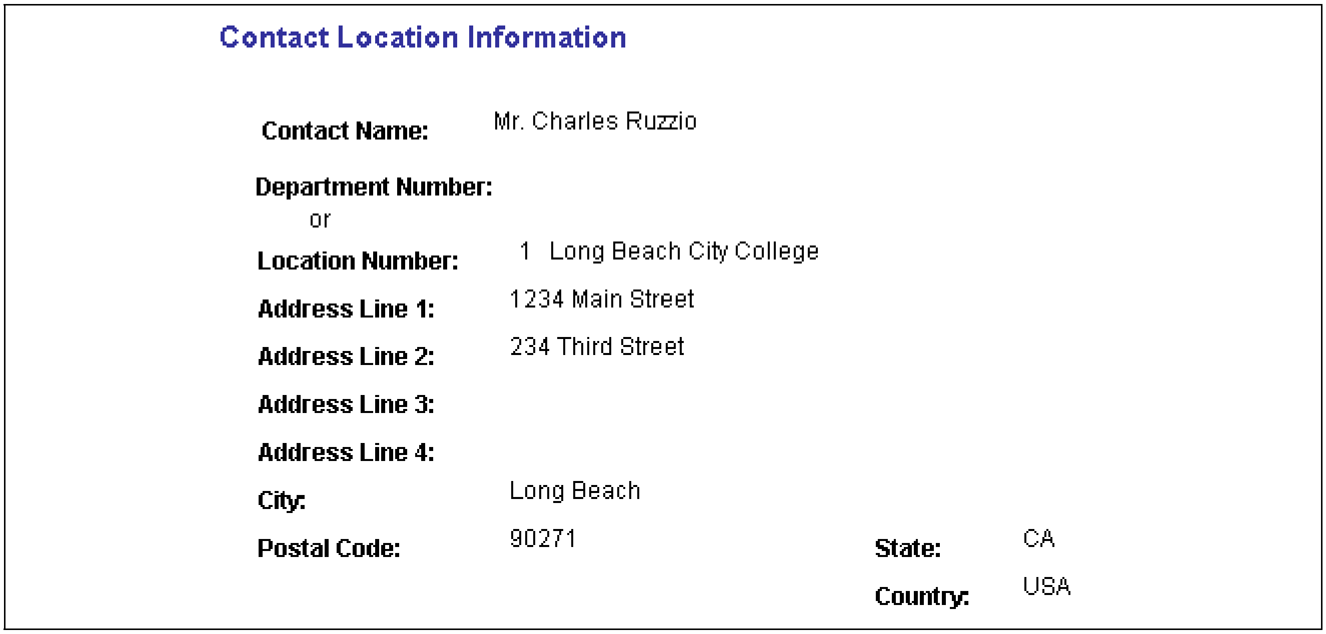


Contact Phone Information page

The Contact Phone Information page is for viewing purposes only. You cannot enter or modify data on this page.

Viewing Contact Location Data

Access the Contact Location Information page.

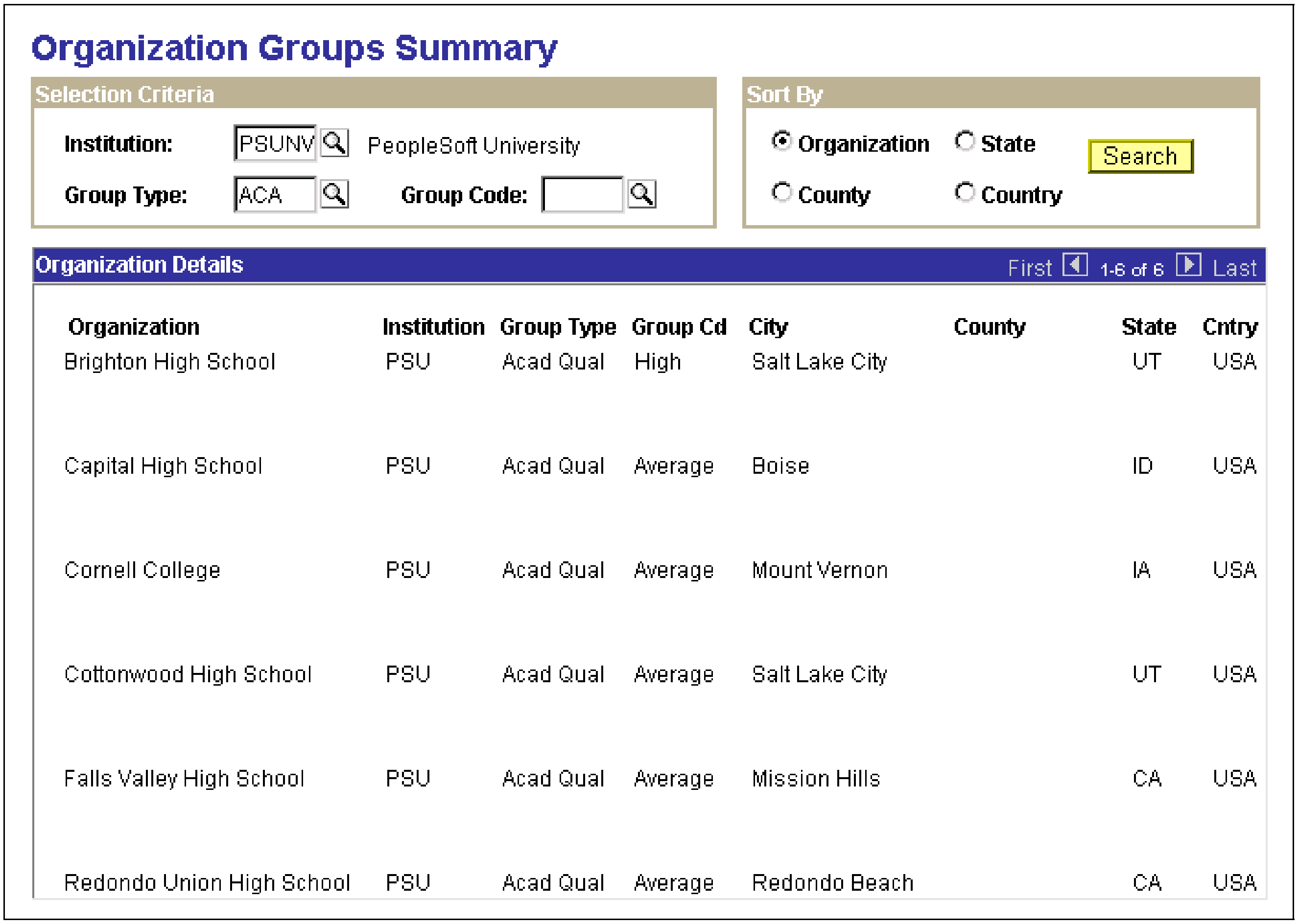


Contact Location Information page

The Contact Location Information page is for viewing purposes only. You cannot enter or modify data on this page.

Viewing Organizations by Group Types

Access the Organization Groups Summary page.



Organization Groups Summary page

Selection Criteria

Institution — The institution associated with the organizations to review.

Group Type — The type of group *(Academic Quality, Feeder,* or *Magnet)* from the Organization Affiliation page, to review.

Note. Because the purpose of this page is to enable you to review a summary of organizations by group, you *must* specify a Group Typ value.

Group Code — The group code, from within the group type, to review.

Sort By

Search — Click to launch the search based on the selected criteria.

Using Organization Search

This section provides an overview of organization search and discusses how to:

- Specify search criteria.
- View search results.

Understanding Organization Search

To avoid creating duplicate records, use the organization search function to determine if an organization with the same data already exists in your database before adding the new one. You can also tell the system how to sort the results of your search.

Note. You must use organization search to determine duplicate organization records. You cannot use Search/Match.

See Also

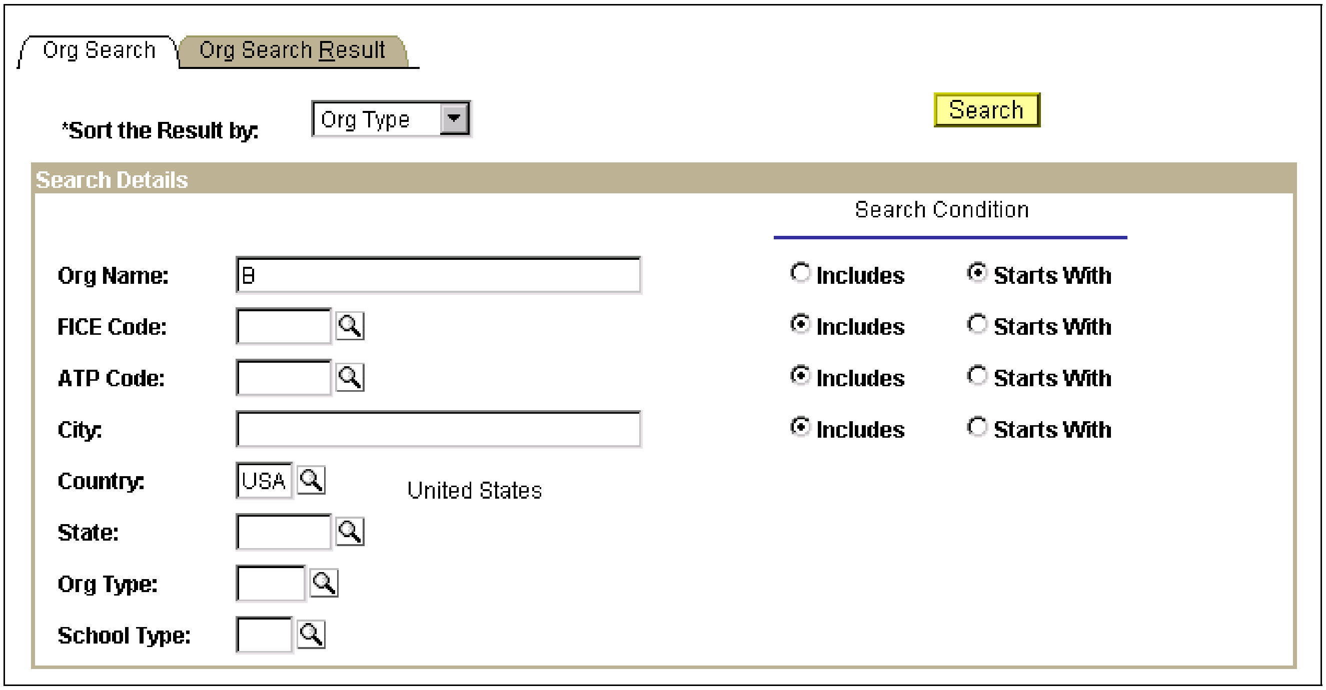
Chapter 19, "Searching for Records," page 159

Pages Used for Organization Search

Page Name	Object Name	Navigation	Usage
Org Search (organization search)	ORG_SEARCH	• Build Community, Organization Data, Inquire, Org Search, Org Search • Manage Contributor Relations, Manage Organizations, Inquire, Org Search, Org Search	Specify criteria for searching for organizations.
Org Search Result (organization search result)	ORG_SEARCH_RESULT	• Build Community, Organization Data, Inquire, Org Search, Org Search Result • Manage Contributor Relations, Manage Organizations, Inquire, Org Search, Org Search Result	View the results of an organization search.

Specifying Search Criteria

Access the Org Search page.



Org Search page

Sort the Result by The information *(ATP Code, City, Country, FICE Code, Name, Org Type, Search Type,* or *State)* by which you want the search results to be sorted.

Search Details

You must specify the details or criteria by which you want the system to search for organizations. You can enter values in one or any combination of the detail fields provided. The more criteria that you specify, the narrower the search.

Note. The system automatically converts alpha characters that you enter in the detail fields to upper case, however the search is not case sensitive. For example, if you enter a lower case *b* in the Organization Name field, when you exit the field the system changes it to upper case *B*. The system will, however, search for all organization names that contain either a lowercase *b* or uppercase *B*.

You can specify the following options for some of the fields to narrow your search even more.

Includes When selected, indicates that the system should search for only the organization records that contain the detail that you entered for that field.

For example, if you enter *B* in the Org Name field and select Includes, the search will include organizations whose names contain any word with a lowercase *b* or an uppercase *B,* for example, Bay Area Society of Engineers, Columbia University, Denver Bank, and so on.

Starts With When selected, indicates that the system should search for only the organization records that begin with the detail that you entered for that field.

For example, if you enter *DEL* in the Org Name field and select Starts With, the search will include organizations where the first word of the organization's name begins with *DEL, DeL, Del,* or *deL,* for example, Delaware Chamber of Commerce, DeLeroy Institute, DELTA, Inc., and so on.

Search Click this button to launch the search and access the Organization Search Result page, where you can view the results of the search based on these criteria.

Viewing Results of the Search

Access the Org Search Result page.

Org Search | Org Search Result

Search Results First 1-14 of 14 Last

Org ID	Organization Name	Organization Type	School Code	School Type	FICE Code	ATP Code	City	State	Country
AV1010	Bechtel Power Company	BUSN		NA			Ann Arbor	MI	USA
AV2010	Bridgman Company	BUSN		NA			Phoenix	AZ	USA
AV2020	Bridgman Electronics	BUSN		NA			Detroit	MI	USA
SFORG1010	Bechtal Power Company	BUSN		NA			Ann Arbor	MI	USA
AV4110	Bauer Hockey Skate Company	BUSN		NA			Billings	MT	USA
SAC0014	Beatty Family Foundation	NONP					Chicago	IL	USA
AV2030	Bridgman Foundation	NONP		NA			Phoenix	AZ	USA
000010002	Brighton High School	SCHL		SCD			Salt Lake City	UT	USA
000010018	Bryn Mawr School	SCHL		SCD		210050	Baltimore	MD	USA
000010020	Bladensburg High School	SCHL		SCD			Bladensburg	MD	USA
000010023	Bohemia Manor High School	SCHL		SCD		210375	Chesapeake City	MD	USA
000010048	Booker T. Washington High Schl	SCHL		SCD		110130	Atlanta	GA	USA
000010053	Bainbridge Junior College	SCHL		CC			Bainbridge	GA	USA
000010118	Boise Bible College	SCHL		COL	022345		Boise	ID	USA

Org Search Result page

The Org Search Result page is for viewing purposes only. You cannot enter or modify data here.

Managing Organization IDs

You can define priority control records to prevent the deletion of organization IDs. You can also change an organization's ID from the system-generated ID to another ID.

See Also

Chapter 3, “Setting Up ID Delete Control,” page 39

Chapter 18, “Managing IDs,” page 151

Entering Codes for External Organizations

This section provides an overview of external organization codes and discusses how to assign codes to external organizations.

Understanding External Organization Codes

You can enter and track external codes for organizations. You can load third-party external codes into your system, for example EPS or ATP codes, and view the results of the automated assignment process on the Organization External Codes page.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, “Loading and Assigning EPS Market Codes”

Chapter 35, “Loading External Organization Data,” page 453

Prerequisites

Before assigning codes to external organizations, set up the code types from which to select.

See Also

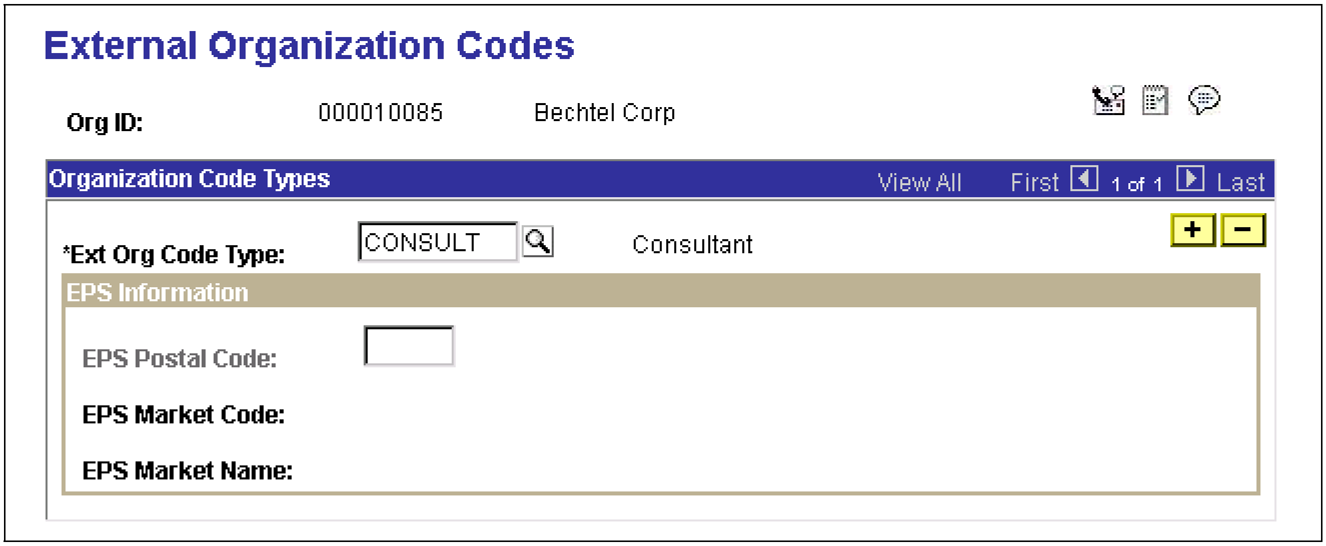
Chapter 11, “Setting Up Organization Data,” Loading or Defining External Codes for Organization Types, page 99

Pages Used to Enter Codes for External Organizations

Page Name	Object Name	Navigation	Usage
External Organization Codes	EXT_ORG_CODES	Build Community, Organization Data, Use, Organization External Codes, Organization External Codes	Assign or review codes for external organizations.

Assigning Codes to External Organizations

Access the External Organization Codes page.



External Organization Codes page

Organization Code Types

External Organization Code Type	The code, from the External Organization Code Table page, that applies to this organization.

EPS Information

EPS Postal Code	If the code type is set as an EPS code on the External Organization Code Table page, the EPS Postal Code field is available. If EPS codes are loaded into your system, you can select from the EPS postal codes for this organization.
EPS Market Code	The system displays the EPS market code based on the EPS postal code.
EPS Market Name	The system displays the EPS market name for you based on the EPS postal code.

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CHAPTER 35

Loading External Organization Data

This section provides an overview of loading external and discusses how to:

- Load external ATP data.
- Load external EPS market code data.

Understanding External Data Load

When you load the data from an external source, you load it into a suspense table. You can then review the data in the suspense table and modify it. To load data into the suspense table, position the source file or tape, specify the location of the source, and run the appropriate load external data process.

PeopleSoft Process Scheduler runs the process and stores the data in the suspense tables. When it is finished, the PeopleSoft Process Scheduler displays a process instance number in the lower left corner of the screen. Use this number to review the data on the appropriate Suspense Process Options page.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Using PeopleSoft Process Scheduler"

Loading External ATP Data

This section provides an overview of loading ATP data and discusses how to:

- Point to the data source.
- Review suspense table data.
- Review school address data.
- Review other school data.

Understanding ATP Data Load

When you schedule the process, PeopleSoft Process Scheduler runs the *CCATPLOD.SQR* process and stores the ATP data in the ATP suspense tables. When the process is finished, the PeopleSoft Process Scheduler displays a process instance number in the lower left corner of the screen. You can review the loaded data on the ATP Suspense Process Options page.

The ATP suspense table holds records not yet posted to the organization tables. School data from these tables migrates to your database during the posting process based on the options that you select on the ATP Search Parameters and ATP Post Parameters pages.

You can review data in the ATP suspense table at any time during the ATP external data load process. You might want to look at the data immediately after loading it, after performing a search/match on it, or after posting it. You can determine if a record is yet to be processed, if a record was added to your database, and if any errors were encountered during the search/match or loading processes.

Note. If you have not yet posted the data, you can edit it on the ATP Suspense Table page. When editing data in the suspense table you must be careful not to create duplicate records that are added to your database during posting.

You may choose to correct errors on the appropriate pages before running the post process. When you make changes to fields in this component click Save; the other fields are updated according to the revisions you made. For example, if the Edit field displayed *Error,* when you fix the errors in the file and save it, the program updates the Edit field to *Complete.*

You should always click *Save* prior to changing any of the processing options so that you can review the results of any data changes you made first.

After loading the ATP data into the suspense table, run the ATP Search/Match process to check for duplicate matching records before posting the data. Each record in the ATP load contains a change code value—*Add, Change, or Delete*—instructing the system to add the record as new, or to change or delete the existing one. The Search/Match process investigates your database to identify conflicts between existing data and the data loaded for posting, and between existing data and the action required by the change code. You must decide what you want the system to do in the case of conflicts.

For example, if the change code is *Add,* and the system finds an existing record that matches the load data, the system will not just update the existing data and add it for posting. You must decide whether the system should update the existing data, place that load data in suspense until you can investigate it further, or just ignore and skip over it. You must also decide what the system should do if the change code is *Change* or *Delete,* and it finds no matching record to change or delete.

After loading the ATP external data into the suspense tables and selecting the parameters for the Search/Match process, run the process and post the data. You can process and post a single record or all records in the suspense tables.

You can remove records from the ATP suspense table by running the ATP Purge Suspense File process.

The PeopleSoft Process Scheduler runs the *CCATPPRD.SQR* process and purges the designated records from the ATP suspense file. When it is finished, the organizations whose data was loaded are added to your database and organization IDs are assigned to them.

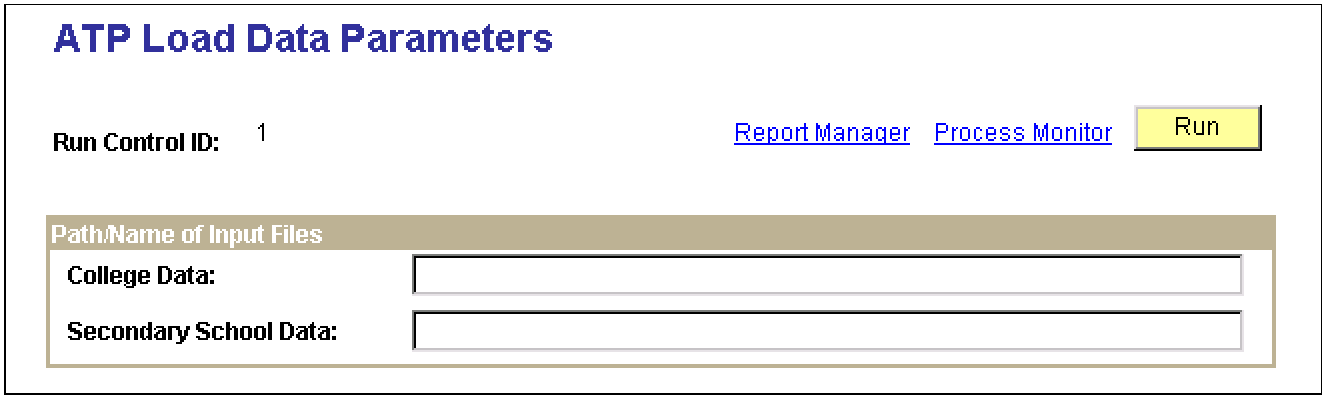
See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Using PeopleSoft Process Scheduler”.

Pages Used to Load External ATP Data

Page Name	Object Name	Navigation	Usage
ATP Load Data Parameters	ATP_LOAD_PARMS	Build Community, Organization Data, Process, ATP Load External Data, ATP Load Parms	Specify the source from which the load process should get the ATP data.
ATP Suspense Process Options	ATP_SUSP_PROC_OPTN	Build Community, Organization Data, Use, ATP Suspense, ATP Suspense Process Options	Review and edit the status of data in the ATP Suspense Table.
ATP Suspense Address Data	ATP_SUSP_ADDRESS	Build Community, Organization Data, Use, ATP Suspense, ATP Suspense Address Data	Review address information loaded for a specific school.
ATP Suspense Data	ATP_SUSP_DATA	Build Community, Organization Data, Use, ATP Suspense, ATP Suspense Data	Review data other than address data for the school record loaded.
ATP Messages	ATP_SUSP_MESSAGE	Build Community, Organization Data, Use, ATP Suspense, ATP Messages	Review and resolve ATP suspense messages.
All ATP Messages	ATP_MESSAG_TABLE	Build Community, Organization Data, Inquire, ATP Messages	Review any of the ATP data messages in your system.
ATP Search Parms (ATP search parameters)	ATP_SEARCH_PARMS	Build Community, Organization Data, Process, ATP Search/Match/Post, ATP Search Parms	Select search parameters to identify duplicate matching records before posting the data.
ATP Post Parms (ATP post parameters)	ATP_POST_PARMS	Build Community, Organization Data, Process, ATP Search/Match/Post, ATP Post Parms	Select parameters for posting the data.
ATP Purge Suspense File	ATP_PURGE_PARMS	Build Community, Organization Data, Process, ATP Purge Suspense File, ATP Purge Parms	Purge data from the ATP Suspense Table.

Specifying the Data Source

Access the ATP Load Data Parameters page.



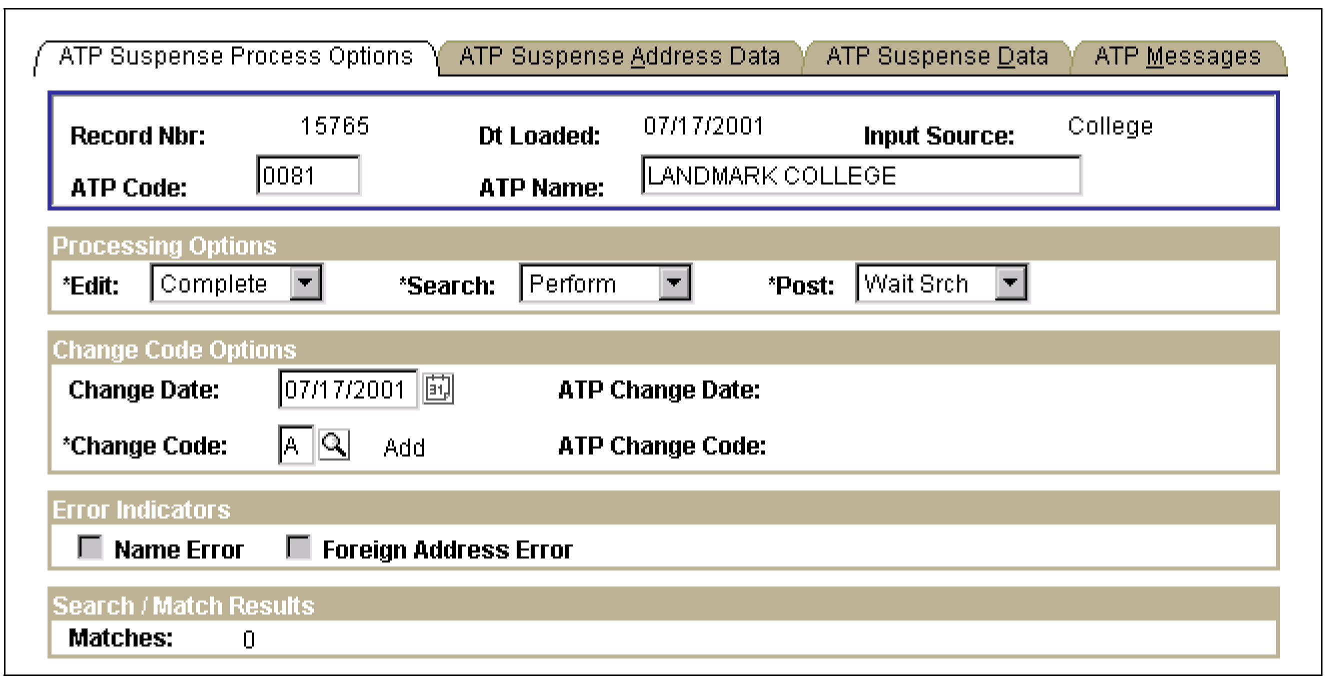
ATP Load Data Parameters page

College Data If the ATP data is college data, specify the correct path to the input file here.

Secondary School Data If the ATP data is secondary school data, specify the correct path to the input file here.

Reviewing Suspense Process Options Data

Access the ATP Suspense Process Options page.



ATP Suspense Process Options page

The top portion of this page displays information about the ATP record: the ATP record number, date loaded, input source, ATP code, and ATP name. You can override the ATP code and ATP name if necessary.

Processing Options

Values for the Edit, Search, and Post fields are delivered preset with your system.

Warning! You can manually edit the values in the Edit, Search, and Post fields, however if any of these fields shows a status of *Error,* and you manually change the status without correcting the error, you might have problems when posting the data.

Edit

The status of the record as the result of the load external data process

Complete: The program was able to process this record without a problem.

Error: The program encountered problems when processing this record.

Perform: This value is only set manually and is for your informational purposes.

Search

The status of the record as the result of the Search/Match process:

Complete: The Search/Match process ran without errors.

Error: The Search/Match process ran and errors were detected on this record.

Perform: The Search/Match process has not yet been run for this record (or the Search/Match process is set so that the record will be re-selected).

Post

The status of the record as the result of the post process. These values can be entered manually, however some are entered by the system after processes are run, as described in the following table

Delete ID: The system encountered an indication that the organization has been deleted from the tape.

Set by the system during the Search/Match process if it is unable to add data to a deleted organization. Can also be set manually.

Error: The Post process encountered a problem.

Set by the system during the Post process.

New ID Add: The system was unable to find a match in the database and will add a record with a new ID when the Post process is run, provided that the system finds no matches and an ATP change code of *Add.*

Set by the system during the Search/Match process if no match was found and a new one is added.

No Action: This value is only added manually. It is not automatically entered by the system. If this value is entered, the Post and Purge processes will ignore the record. Set manually.

Purge: This value indicates that this suspense record will be removed from the system during the Purge process.

Set by the system during the Post process if the record was successfully processed.

Update ID: The system found a matching ID in the database. This existing ID record will be updated with the data from this ATP record during the Post process.

Set by the system during the Search/Match process if a match was found in the database.

Wait Search: This record is in the Suspense table and is waiting to be processed by the Search/Match process.

Set by the system during the ATP Load External Data process.

Error Indicators

When the *Error* indicator appears in the Edit field in the Processing Options group box, the Error Indicators group box identifies the type of error.

Note. Correct errors on the appropriate page before running the Post process. When you make and save the correction, the system updates the Processing Options group box fields accordingly. For example, if the Edit field value is *Error,* when you fix the errors in the file so that the system now recognizes the data, when you save the change, the system changes the Edit field to *Complete.* You should always save prior to changing any of the processing options so that you can review the results of any data changes.

Name Error When selected, indicates that the system could not recognize the name data.

Foreign Address Error When selected, indicates that the system could not recognize the address data or the country of the address is not in the database.

Change Code Options

Change Date The system automatically displays the date when ATP Load External Data process ran. You can change this date if necessary.

Change Code Instructs the system what to do with the record loaded by the ATP Load External Data process. The system automatically displays the value of *Add* for each record loaded by the process.

Values for this field are delivered with your system as . Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Add: Add the record loaded by the ATP Load process, as a new record to your database.

Change: Change the existing record to reflect the record loaded by the ATP Load process.

Delete: Delete the record loaded by the ATP Load process.

See Chapter 35, “Loading External Organization Data,” Loading External ATP Data, page 453.

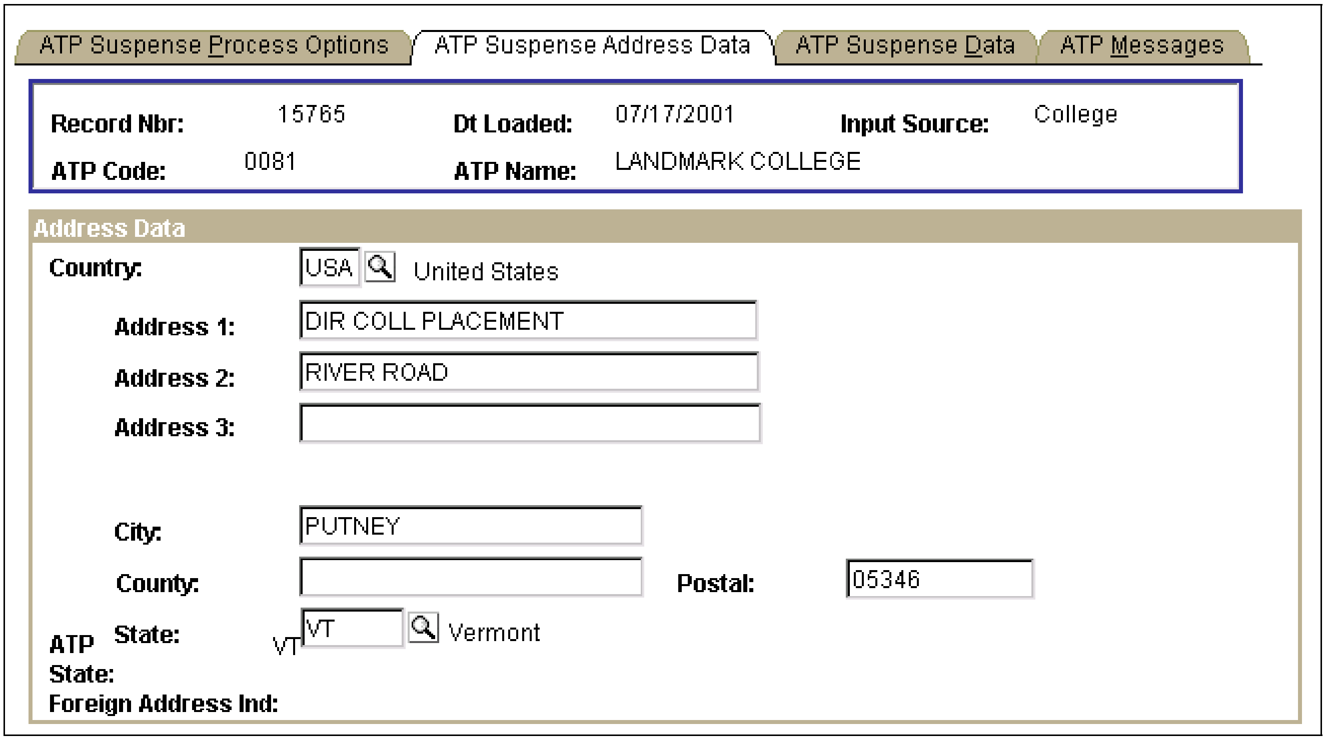
Search/Match Results

Matches The number of matches that the Search/Match process found for this organization.

Note. You can view additional information about errors and other processing actions on the ATP Messages page.

Reviewing School Address Data

Access the ATP Suspense Address Data page.

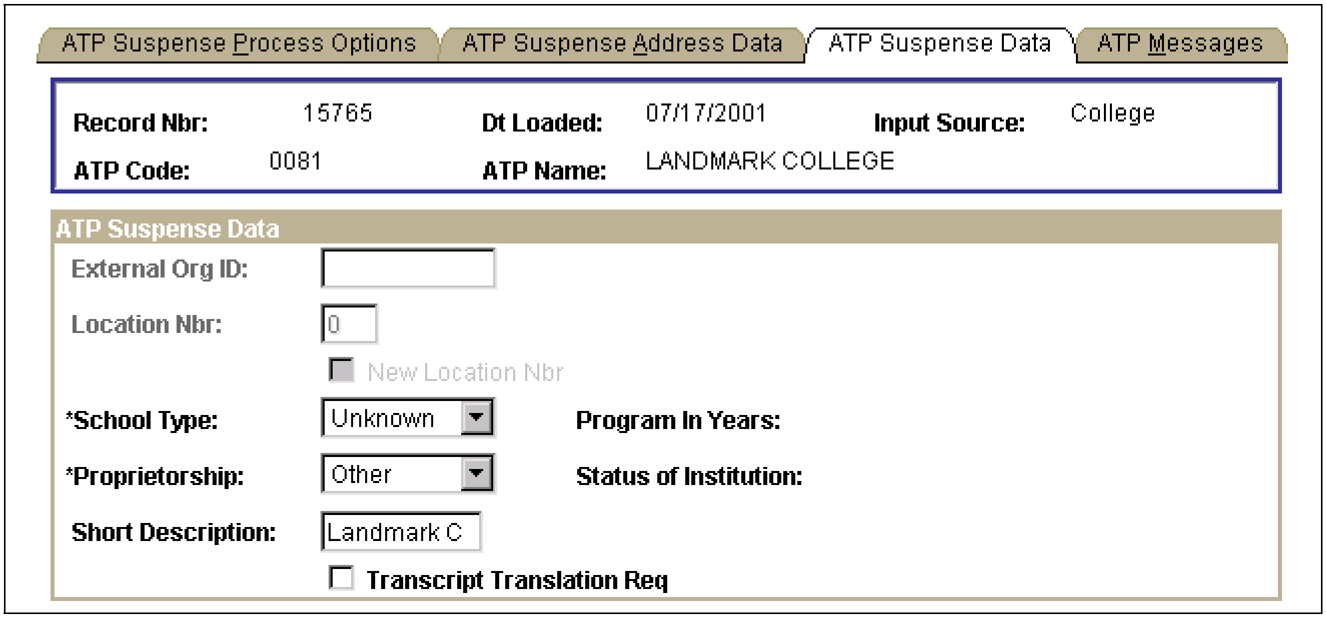


ATP Suspense Address Data page

The external data load provides the information on this page. You can change the address information if necessary.

Reviewing Other School Data

Access the ATP Suspense Data page.



ATP Suspense Data page

External Organization ID
The system displays the existing ID of the organization or, if none exists, assigns the next available new ID when you save.

Location Number
The address location number of this organization. The default location number when adding a new organization, is one.

New Location Number
When selected, indicates that the system found that the organization exists in your database, but the location address was changed or added by the data load. You can overwrite the new location number by specifying a location number or clearing the New Location Number check box.

School Type
The system displays the type of this school, if a value for that exists on the School Type Table used by the ATP Load External Data process.

Program In Years
The system displays the program in years if a value for that exists on the source tape.

Proprietorship
The system displays the name of the proprietorship if the value on the source tape matches a proprietorship value used by the ATP Load External Data process.

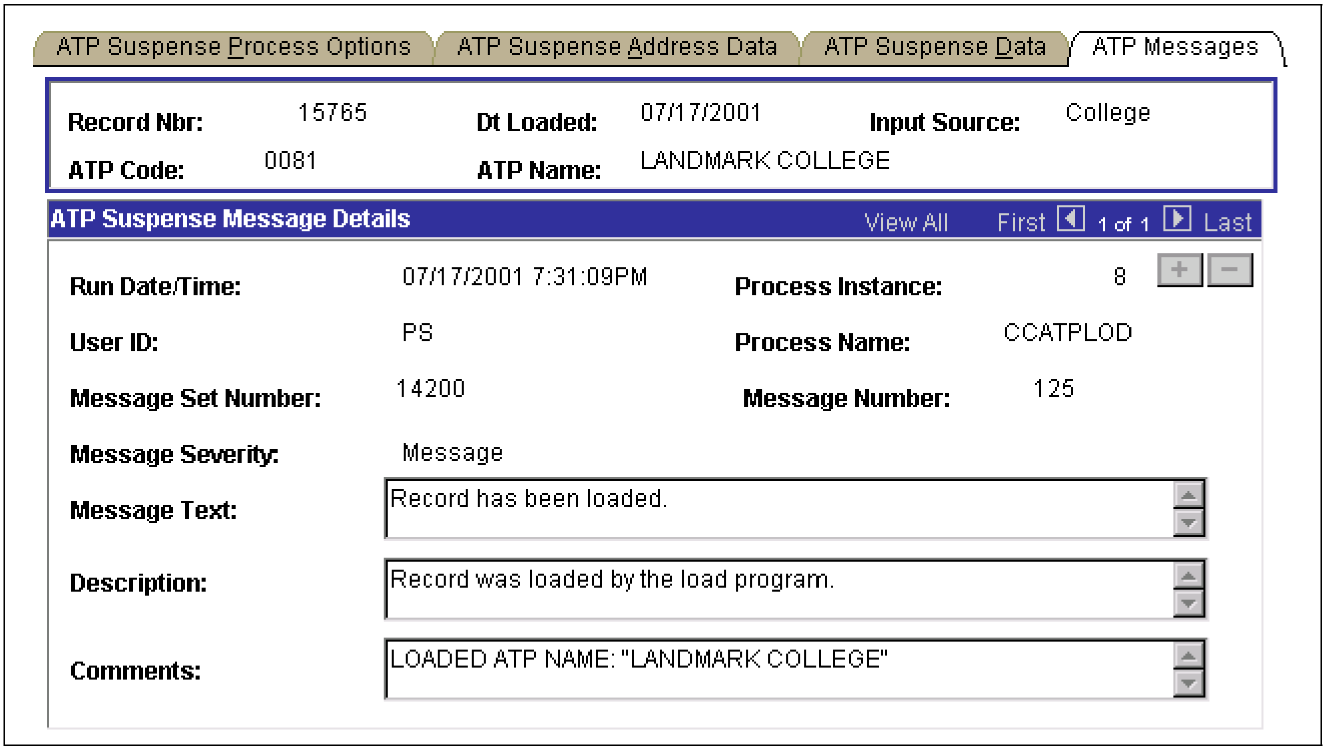
Values for this field are delivered with your system as . Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status of Institution
The system displays the status of the institution if a value for that exists on the source tape.

Transcript Translation Required
When selected, indicates that the transcript from this organization will need to be translated.

Reviewing ATP Data Suspense Messages

Access the ATP Messages page.


ATP Suspense Process Options | ATP Suspense Address Data | ATP Suspense Data | ATP Messages

Record Nbr: 15765 **Dt Loaded:** 07/17/2001 **Input Source:** College

ATP Code: 0081 **ATP Name:** LANDMARK COLLEGE

ATP Suspense Message Details View All First 1 of 1 Last

Run Date/Time: 07/17/2001 7:31:09PM **Process Instance:** 8

User ID: PS **Process Name:** CCATPLOD

Message Set Number: 14200 **Message Number:** 125

Message Severity: Message

Message Text: Record has been loaded.

Description: Record was loaded by the load program.

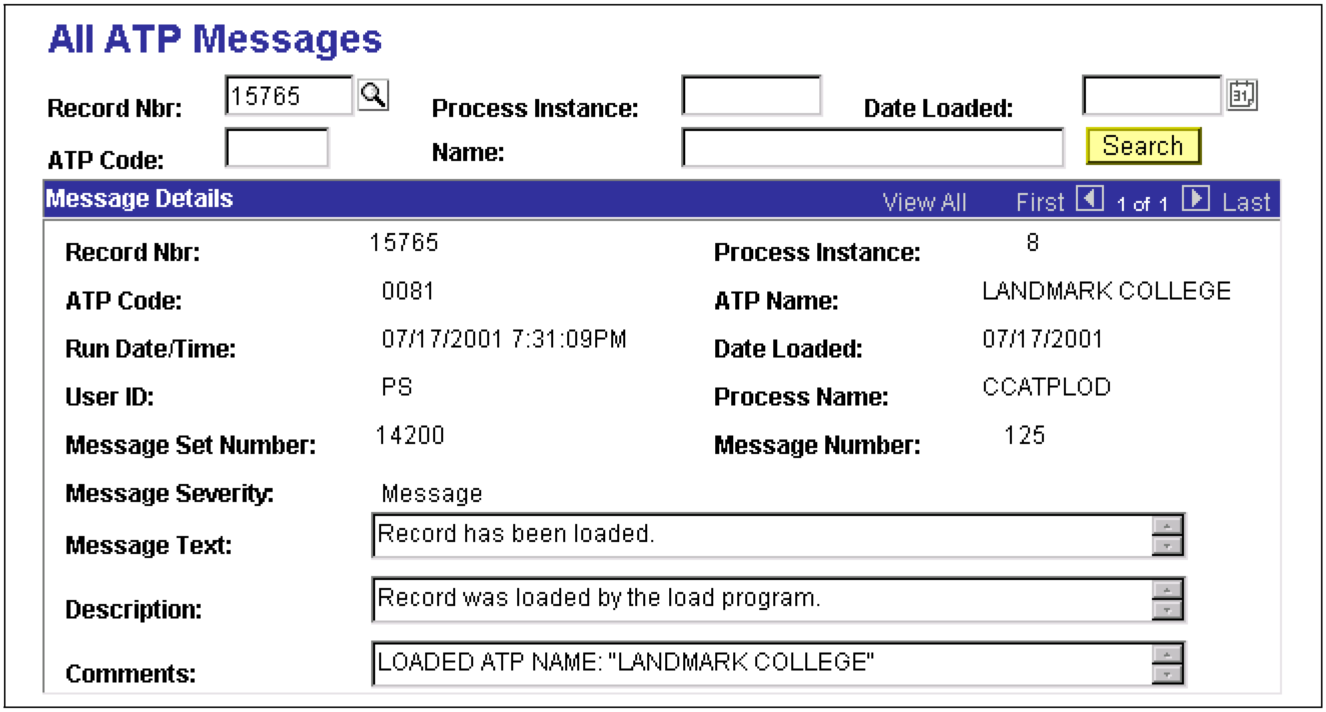
Comments: LOADED ATP NAME: "LANDMARK COLLEGE"

ATP Messages page

The ATP Messages page is for viewing purposes only. You cannot enter or modify data here.

Reviewing All ATP Messages

Access the All ATP Messages page.

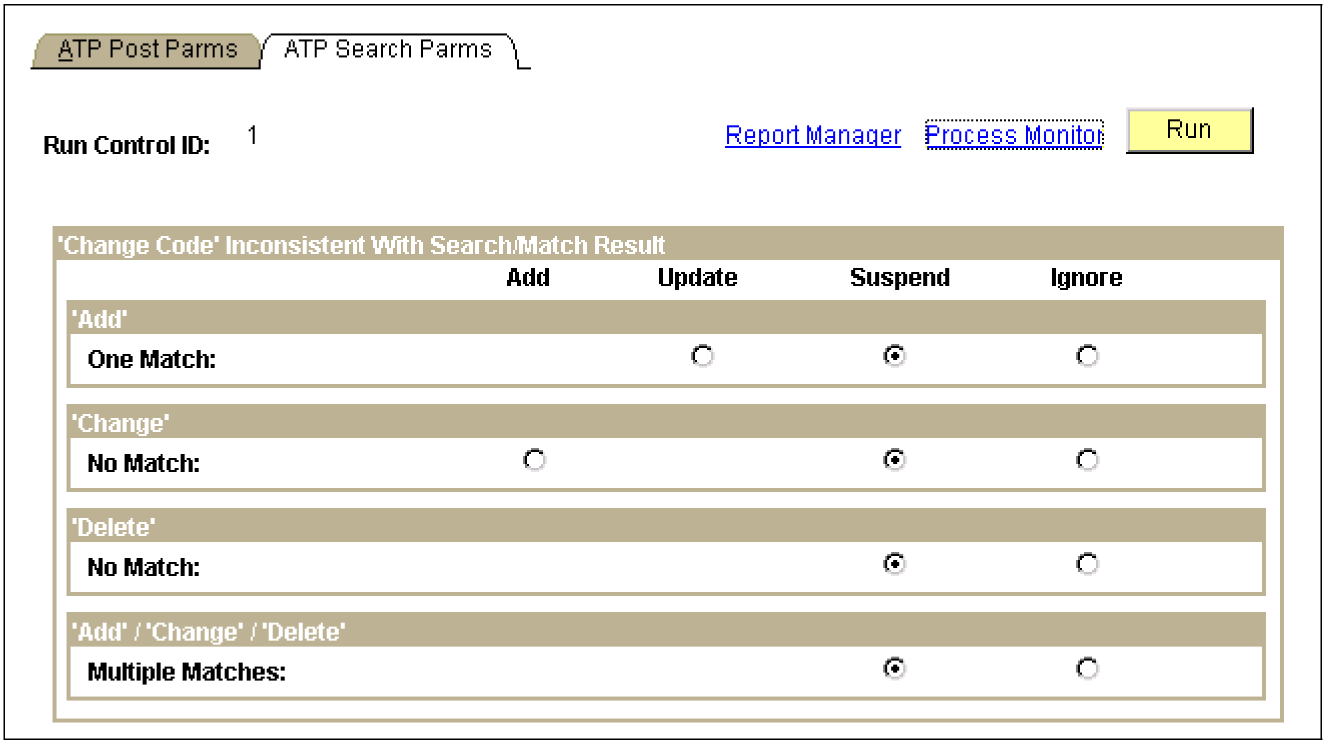


All ATP Messages page

Enter any combination of record number, process instance (generated by the process scheduler), date loaded, and ATP code. Click the Search button to launch the search for all ATP messages based on the criteria you selected.

Specifying Search Parameters

Access the ATP Search Parms page.



ATP Search Parms page

The following values are common to each group box on this page.

Add	When selected, indicates that the system should automatically add the load data.
Update	When selected, indicates that the system should automatically overwrite the existing data with the new load data.
Suspend	When selected, indicates that the system should set the load data aside and post a message about it to the ATP Messages page until you can investigate further.
Ignore	When selected, indicates that the system should do nothing with the load data or to your database, and just continue with the ATP Search/Match process.

Add

One Match	Select what you want the system to do (update, suspend, or ignore) when the change code is *Add* and the Search/Match process finds one match.

Change

No Match	Select what you want the system to do (update, suspend, or ignore) when the change code is *Change* and the Search/Match process finds no match.

Delete

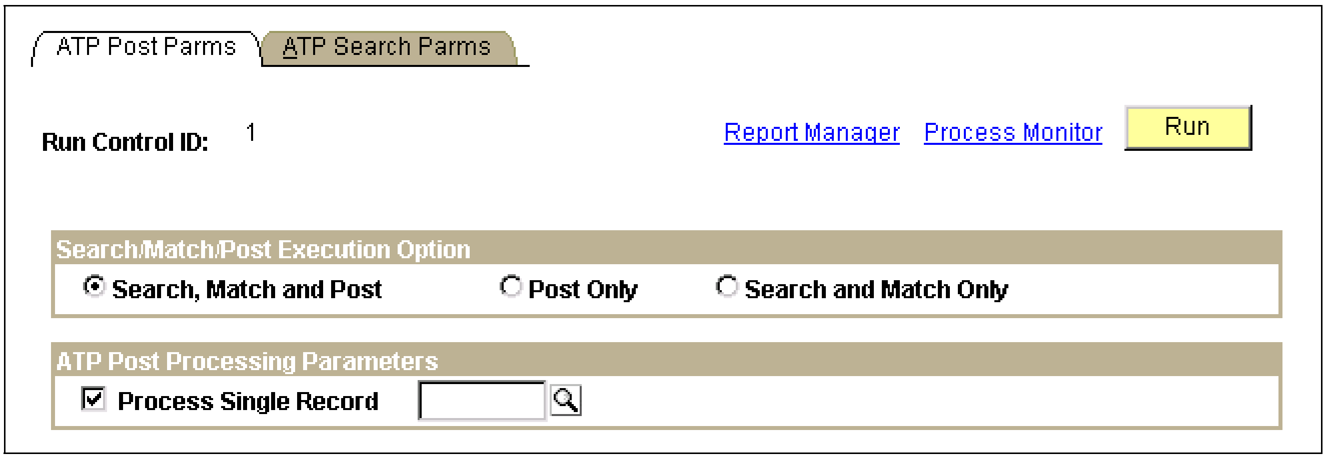
No Match	Select what you want the system to do (update, suspend, or ignore) when the change code is *Delete* and the Search/Match process finds no match.

Add/Change/Delete

Multiple Matches Select what you want the system to do (update, suspend, or ignore) when the change code is *Add, Change* or *Delete* and the Search/Match process finds multiple matches.

Searching for Duplicate Records and Posting the Data

Access the ATP Post Parms page.



ATP Post Parms page

Search/Match/Post Execution Option

Select the processes to run: *Search, Match and Post, Post Only,* or *Search and Match Only.*

Note. If you choose to run either *Search, Match and Post* or *Search and Match Only* you should indicate the conflicts parameters on the ATP Search Parameters page

---

ATP Post Processing Parameters

Process Single Record When selected, indicates that the specified process should run only on one record. You must specify the ATP record number for the school the system will post.

When you click Runand schedule the process, the PeopleSoft Process Scheduler runs the *CCATPPST.SQR* process and posts the ATP data.

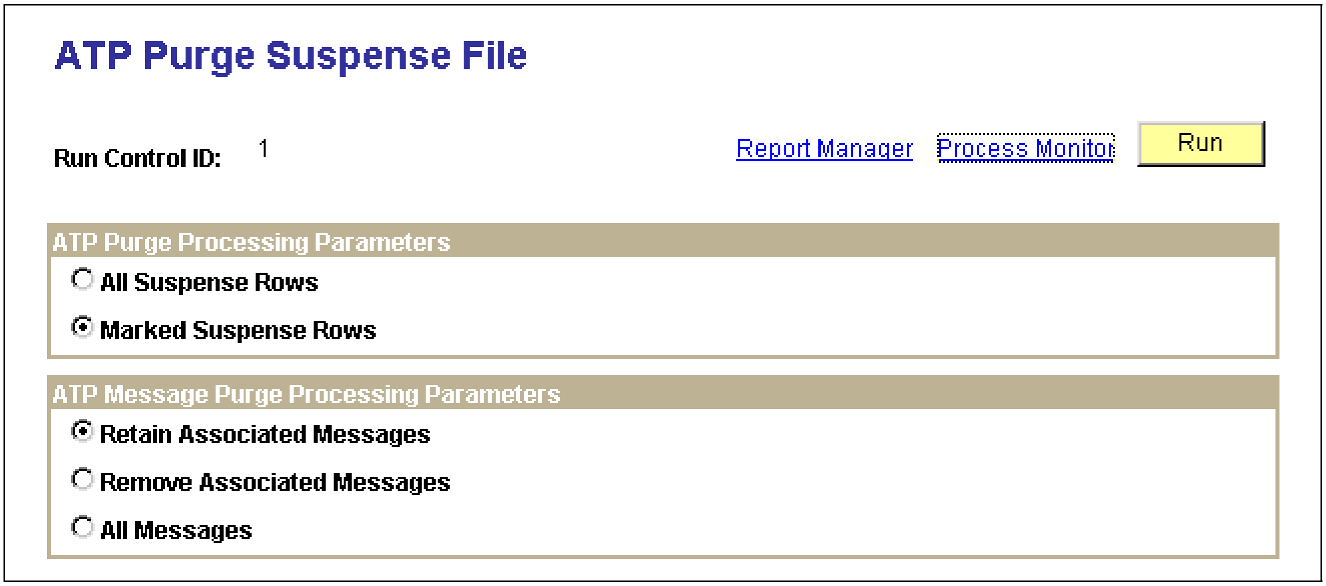
Note. If you selected *Search, Match and Post* or *Search and Match Only,* you should review messages on the ATP Messages page to investigate and resolve conflicts for which you set the search parameters to *Suspend.*

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Using PeopleSoft Process Scheduler”

Purging ATP Data from the Suspense File

Access the ATP Purge Suspense File page.



ATP Purge Suspense File page

Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler Request page, where you can specify where a process or job runs and the process output format.

ATP Purge Processing Parameters

All Suspense Rows When selected, indicates that the process should purge all records in your suspense tables.

Marked Suspense Rows When selected, indicates that the process should purge only those records marked *Purge* in your suspense file as indicated in the ATP Suspense Process Options page.

ATP Message Purge Processing Parameters

Remove Associated Messages When selected, indicates that the process should purge messages associated with the row of data selected by the Marked Suspense Rows option.

Retain Associated Messages When selected, indicates that the process should not purge any messages associated with the row of data selected by the Marked Suspense Rows option.

All Messages When selected, indicates that the process should purge all messages from the suspense files. You should select this option if you selected the All Suspense Rowsoption.

Loading External EPS Data

Use the EPS data load pages to load EPS market codes into you system similar to the way you load external ATP data. Some admissions offices use EPS market codes to focus their recruiting efforts in the geographic areas where they believe they will be the most successful.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, “Loading and Assigning EPS Market Codes”

CHAPTER 36

Managing Committee Data

This chapter provides an overview committees and discusses how to:

- Create a committee.
- Assign committee members.
- Review committees.

Prerequisites

Before creating a committee, create a committee template and then use the template to create similar committees or committees for similar events.

See Also

Chapter 16, “Setting Up Committee Templates,” page 139

Creating Committees

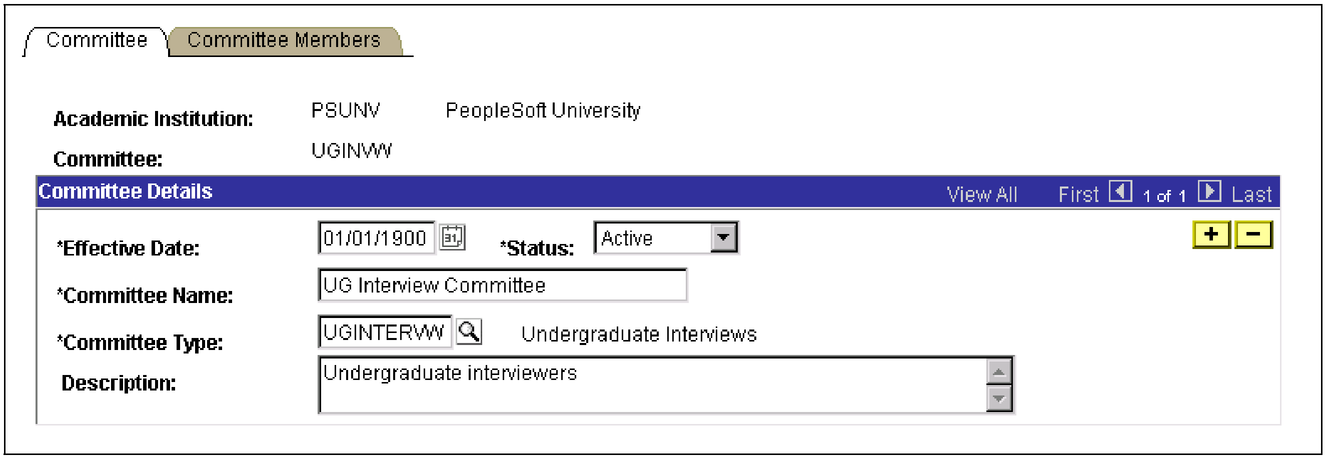
This section discusses how to create a committee.

Page Used to Create Committees

Page Name	Object Name	Navigation	Usage
Committee	COMMITTEE	• Build Community, Committees, Use, Manage Committees, Committee • Design Student Administration, Design Financial Aid1, Setup C-E, Committees, Committee • Manage Student Records, Track Student Careers, Use, Committees, Committee	Create or review a committee

Creating a Committee

Access the Committee page.



Committee page

Committee Details

Committee Name The name of this specific committee.

Committee Type The type of committee, from the Committee Type/Role page, that describes this committee.

Assigning Committee Members

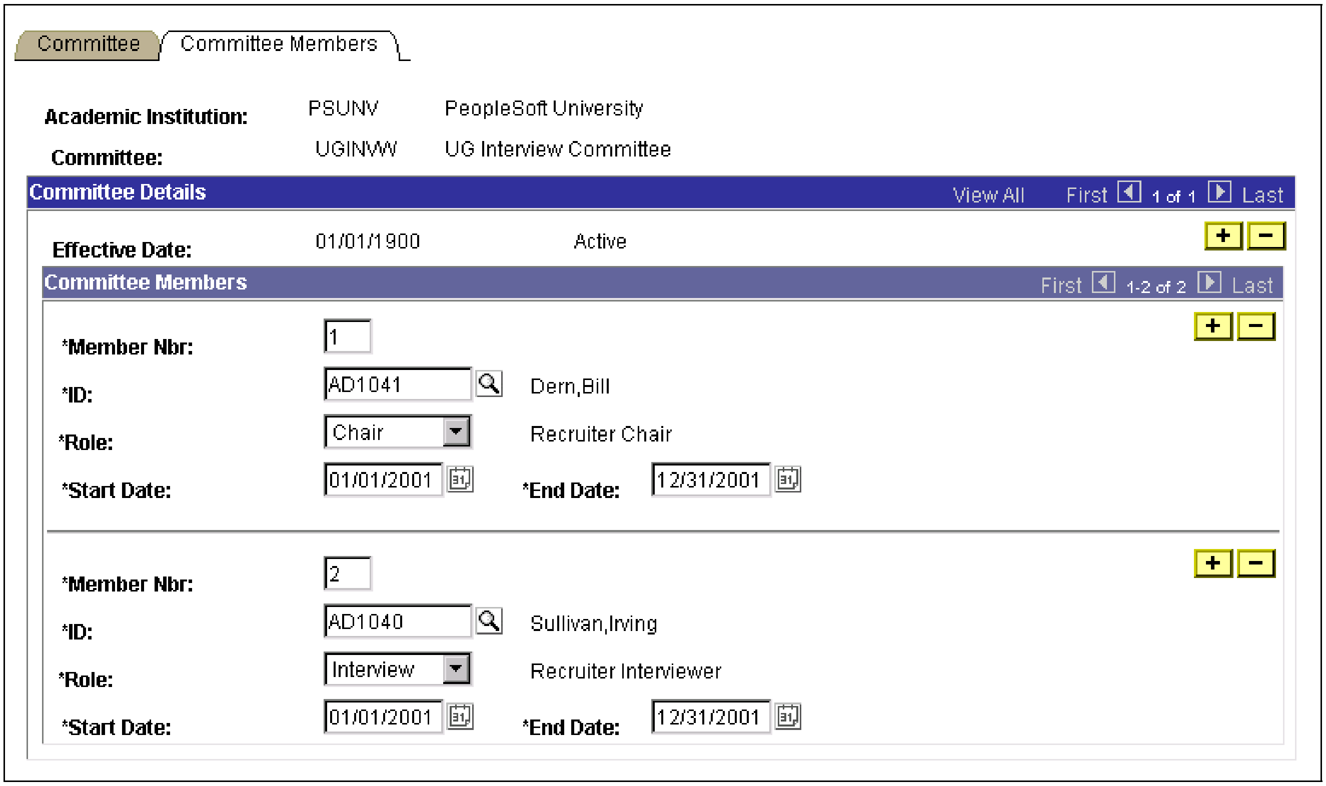
This section discusses assigning members to a committee.

Page Used to Assign Committee Members

Page Name	Object Name	Navigation	Usage
Committee Members	COMMITTEE_MEMBERS	• Build Community, Committees, Use, Manage Committees, Committee Members • Design Student Administration, Design Financial Aid1, Setup C-E, Committees, Committee Members • Manage Student Records, Track Student Careers, Use, Committees, Committee Members	Assign individual members to a committee.

Assigning Members to a Committee

Access the Committee Members page.



Committee Members page

Committee Members

Member Number The number of this member in the list of members for this committee.

The system automatically enters the next sequential number for each member that you add. You can override the number manually to reorder the list of committee members.

ID The ID of the individual assigned to this committee. The system displays the individual's name after you select the ID.

Role The role assigned to this individual for this committee.

Start Date The date when the member's participation in this committee is scheduled to begin.

End Date The date when the member's participation in this committee is scheduled to end.

CHAPTER 37

Managing Events Data

This chapter gives an overview of setting up events and discusses how to:

- Create an event.
- Track event attendance.
- Review event, meeting, and attendee information.
- View reports for events.

Understanding Events

You can use your system to help plan and manage events. A set of meetings comprise one overall event and each meeting can have resources and staff assigned to it. For example, you could create an event called Orientation. Your template might include meetings such as a welcome reception, a general session, several workshops, and a tour of the campus. You can identify the required resources for each meeting (tables, chairs, brochures, banners, and so on), and assign and schedule the responsible staff.

Orientation, for example, is a recurring event, and each of the meetings might need the same resources and staff each time. You can create an Orientation event template to make it easier to regularly plan and manage this event. You can also use the template to plan similar events.

Courses are also events. You use event planning to assign classrooms, identify faculty, and schedule equipment for courses.

Note. Be careful not to confuse the events described here with 3C engine events. One attends the events described here. 3C engine events are occurrences in data within your system.

You can use your system to get an accurate count of how many attendees you invited to an event, how many plan to attend, and how many actually attended.

You can identify attendees who are in your database versus those who are not. You can also add guests as attendees and associate them with the host attendee who invited them. Tracking guest information this way can be especially useful in social situations. For example, if an attendee invites two coworkers who you know are key figures in your local community, you do not have to remember which attendee works with and invited them, you can check the list of attendees to find out

Note. Attendees do not have to exist in your database to attend an event. However, if you want to add each attendee to your system, use the Bio/Demo Data pages to create records and add them to your database. Adding attendees to your system enables you to include them in any confirmation, thank you, or other letter that you generate for the event.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Defining Buildings, Rooms, and Classroom Facilities

Common Elements Used in This Chapter

Event ID
The ID number for an event. When you create a new event on the Events page, the event ID is all zeros until you save the page. After you save the page, the system assigns the next available event ID.

Event Type
Select the type, from the Event Types page prompt list, that describes the event.

Academic Institution
The academic institution responsible for the event.

Event Manager
The individual at your institution who is managing the event.

Event Meeting
The number of each meeting in the list of meetings for an event. The system automatically enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings are listed in the specified order.

Primary Meeting
The primary meeting for the event. You can identify a primary meeting from the list of meetings for an event on the Event Template page. When you save the page, the system displays the event meeting number and corresponding meeting location for the primary meeting on the Event page.

Campus Coordinator
The individual at your institution who is responsible for, or should be contacted regarding, this meeting.

Department Sponsor
The department at your institution that is responsible for this meeting.

Manager
The name of the responsible department's manager. The system displays the manager's name if one is associated with department sponsor on the Department Profile page.

Attendee
An individual who is invited or scheduled to attend any event meeting.

Guest Relationship
The relationship between the host attendee and the guest attendee. If a guest is identified, the guest relationship is required.

Creating an Event

This section discusses how to:

- Name the event.
- Add meetings to an event.
- Enter meeting details.
- Specify meeting sponsors.
- Enter the meeting location.
- Schedule meeting resources.
- Schedule meeting staff.

Prerequisites

Before creating events, define the types of events, staff, and resources. You might also find it helpful to use to set up general event templates from which to copy when creating specific events.

Set up internal departments and organization departments and contacts before designating event managers, sponsors, and contacts. You must also set up facilities before you can designate event locations.

See Also

Chapter 17, “Setting Up Events,” page 143

Chapter 33, “Adding Organizations to Your Database,” Creating an Organization Record, page 411

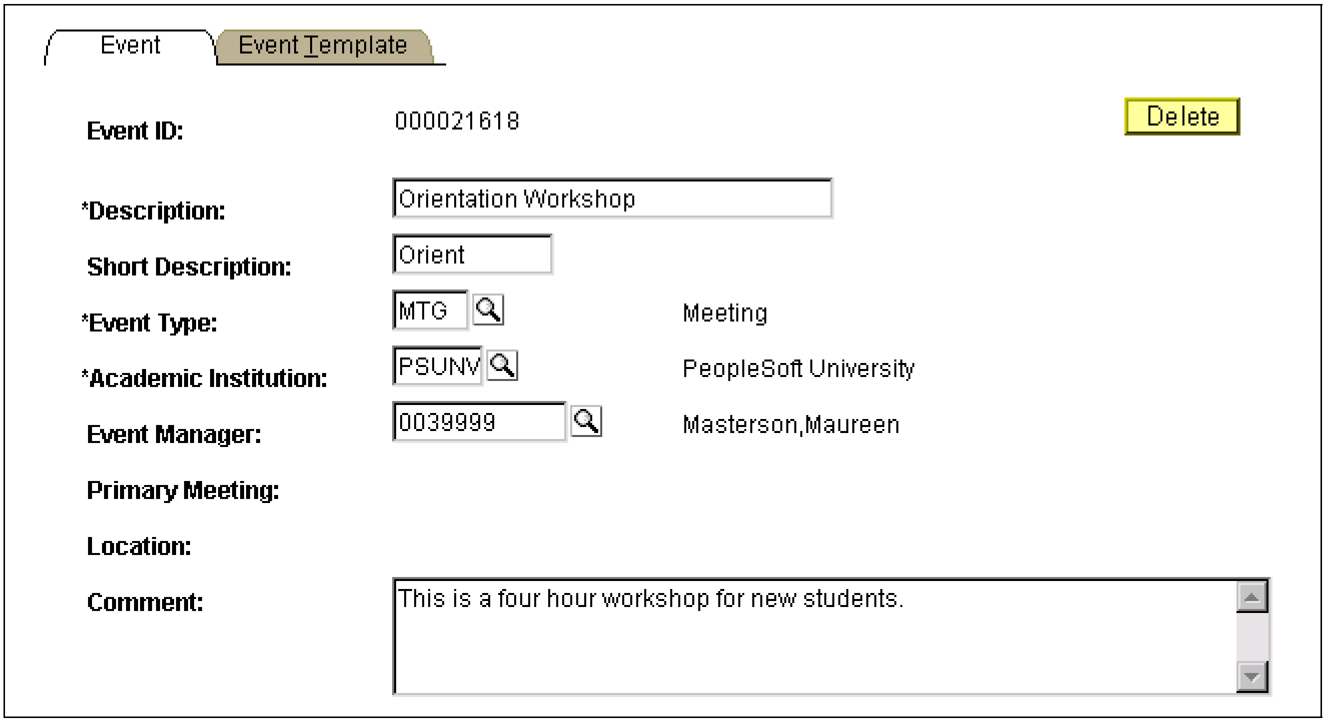
PeopleSoft 8 SP1 Student Records PeopleBook, “Preparing for the Course Catalog and Schedule of Classes,” Defining Buildings, Rooms, and Classroom Facilities

Pages Used to Create an Event

Page Name	Object Name	Navigation	Usage
Event	CAMPUS_EVENT	• Build Community, Events, Use, Events, Event • Manage Contributor Relations, Manage Events, Use, Events, Event	Name an event, including selecting the event type and assigning the event manager.
Event Template	CAMPUS_MEETING	• Build Community, Events, Use, Events, Event Template • Manage Contributor Relations, Manage Events, Use, Events, Event Template	Specify event meetings.
Meeting Detail	CAMPUS_MEETING1	• Build Community, Events, Use, Meetings, Meeting Detail • Manage Contributor Relations, Manage Events, Use, Meetings, Meeting Detail	Enter meeting details, including date, time, and anticipated attendance.
Meeting Sponsor	CAMPUS_MEETING2	• Build Community, Events, Use, Meetings, Meeting Sponsor • Manage Contributor Relations, Manage Events, Use, Meetings, Meeting Sponsor	Enter meeting sponsor and contact information.
Meeting Location	CAMPUS_MEETING3	• Build Community, Events, Use, Meetings, Meeting Location • Manage Contributor Relations, Manage Events, Use, Meetings, Meeting Location	Enter meeting location information.
Meeting Resources	CAMPUS_MTG_RSRCES	• Build Community, Events, Use, Meetings, Meeting Resources • Manage Contributor Relations, Manage Events, Use, Meetings, Meeting Resources	Schedule meeting resources.
Meeting Staff	CAMPUS_MTG_STAFF	• Build Community, Events, Use, Meetings, Meeting Staff • Manage Contributor Relations, Manage Events, Use, Meetings, Meeting Staff	Schedule meeting staff.

Naming the Event

Access the Event page.



Event page

Event ID When you create a new event, the event ID is all zeros until you save the page. After you save the page, the system assigns the next available event ID.

Event Type The type, from the Event Types page, that describes this event.

Academic Institution The academic institution responsible for this event.

Event Manager The individual at your institution who is managing this event.

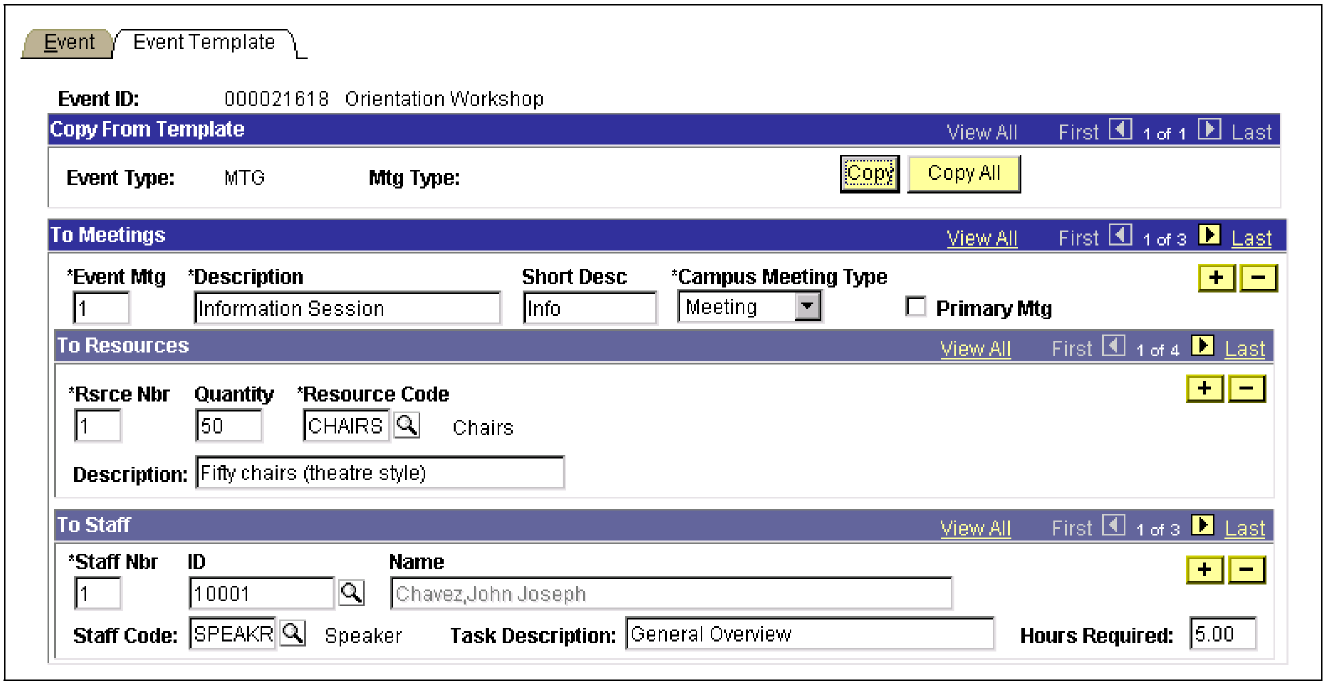
Primary Meeting After you identify a primary meeting for this event on the Event Template page and save that page, the system displays the number of that meeting here. The system displays the location for the meeting in the *Location* field.

Comment Comments to further identify or describe this event.

Delete Click this button to delete this event from your database.

Adding Meetings to an Event

Access the Event Template page.



Event Template page

Note. You can also add meetings to an event on the Meeting Details page.

Copy From Template

If meetings, resources, and staff templates exist for the selected event type (from the meeting Template page, Meeting Resource Templates page, and Meeting Staff Template page), the system displays that data here. You can click either the Copy or Copy All button to copy the information from those templates to this event. If no template exists, no data appears here, and you must add the meetings and assign the resources and staff for this event.

Copy	Click this button to copy each meeting set up for the event type selected with its resources and staff. You can manually change any of the copied information.
Copy All	Click this button to copy all the meetings with their resources and staff. You can manually change any of the copied information.

Note. The Copy All button is especially helpful if, for example, if you have the same event each year. Instead of entering the information each time, you can click this button to copy all information from the template, and update the information for the current year's event.

To Meetings

Primary Meeting	When selected, indicates that this is the primary meeting for this event.

To Resources

Add the resources and quantity that you need for this meeting. You can also add a brief description.

To Staff

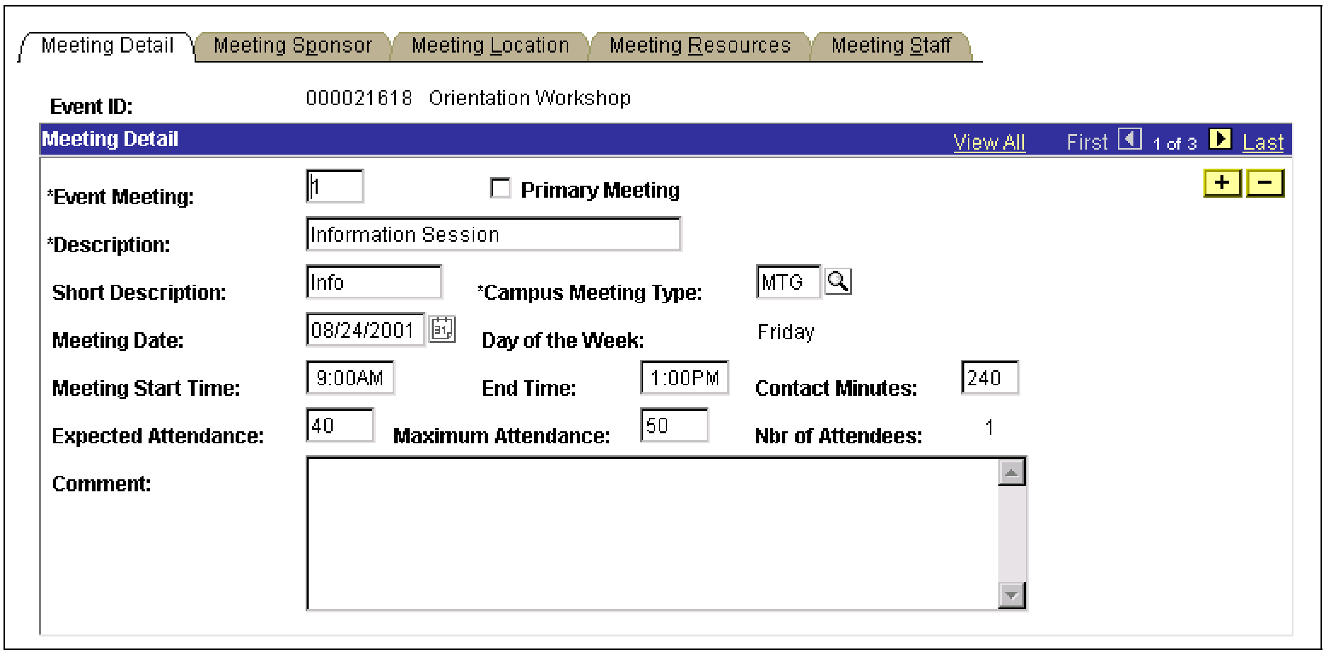
ID The ID of the individual responsible for this task.

Hours Required The number of hours that the assigned individual is required to perform or participate in this task.

You can also add a brief task description.

Entering Meeting Details

Access the Meeting Detail page.



Meeting Detail page

Event Meeting The number of this meeting in the list of meetings for this event.

The system automatically enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.

Primary Meeting When selected, indicates that this is the primary meeting for this event.

Campus Meeting Type The meeting type that best describes this meeting.

Values for this field are delivered with your system as . You can modify these .

Meeting Date The date when this meeting is scheduled to occur.

Day of the Week The day of the week when this meeting is scheduled to occur. The system automatically displays the day of the week when you exit the *Meeting Date* field.

Meeting Start Time The time when this meeting is scheduled to begin. The system assumes the time is *AM.* If not, you must enter *PM.*

End Time The time when this meeting is scheduled to end. The system assumes the time is *AM.* If not, you must enter *PM.*

Contact Minutes The length or duration of this meeting. The system calculates the contact time based on the meeting start and end times. The system recalculates the contact minutes each time that you change the start or end time. You can override the calculated minutes value.

Expected Attendance The number of attendees expected at this meeting.

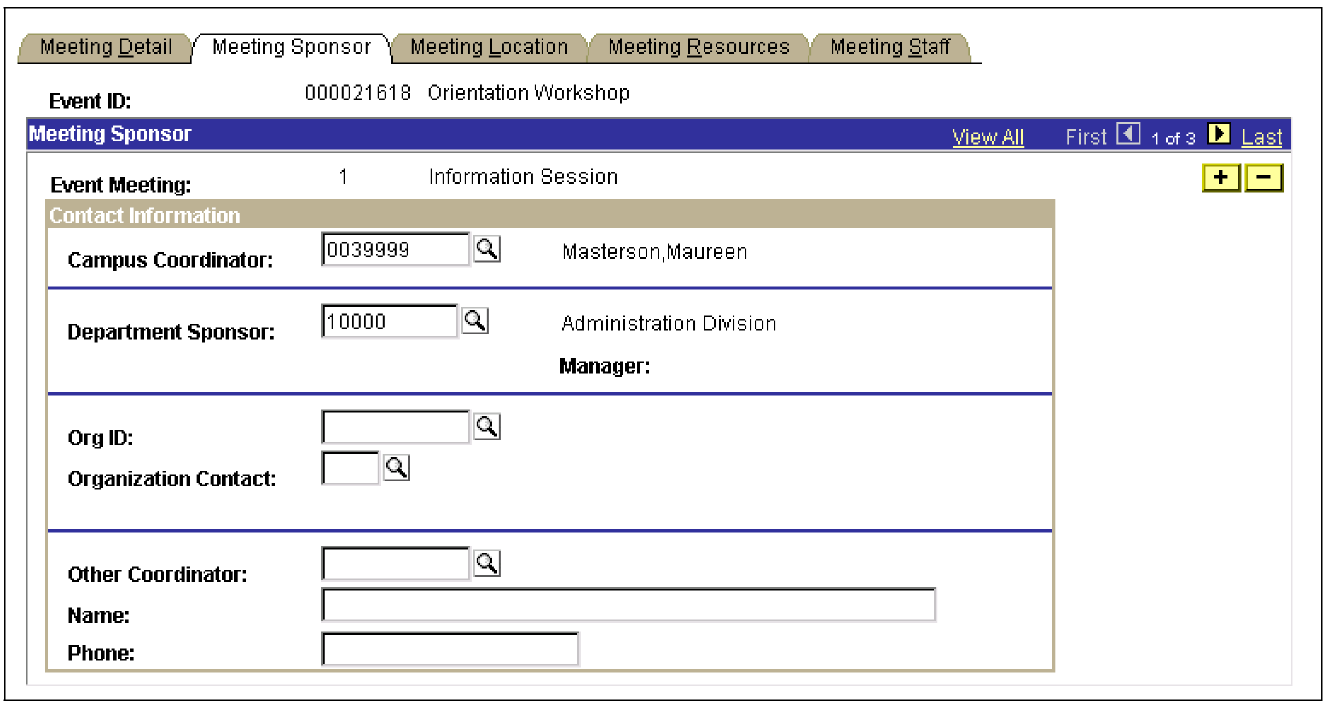
Maximum Attendance The maximum number of attendees that can be accommodated for this meeting.

Number of Attendees The number of attendees invited to this meeting. The system displays the number of invited attendees assigned to this meeting on the Event Attendees page.

Comments Comments to further identify or describe this meeting.

Specifying Meeting Sponsors

Access the Meeting Sponsor page.



Meeting Sponsor page

Campus Coordinator The individual at your institution who is responsible for, or should be contacted regarding, this meeting.

Department Sponsor The department at your institution that is responsible for this meeting.

Manager The name of the responsible department's manager. The system displays the manager's name if one is associated with this department on the Department Profile page.

Organization ID — The organization that is responsible for or is sponsoring this meeting.

Organization Contact — The individual in the responsible organization whom you institution should contact regarding this meeting.

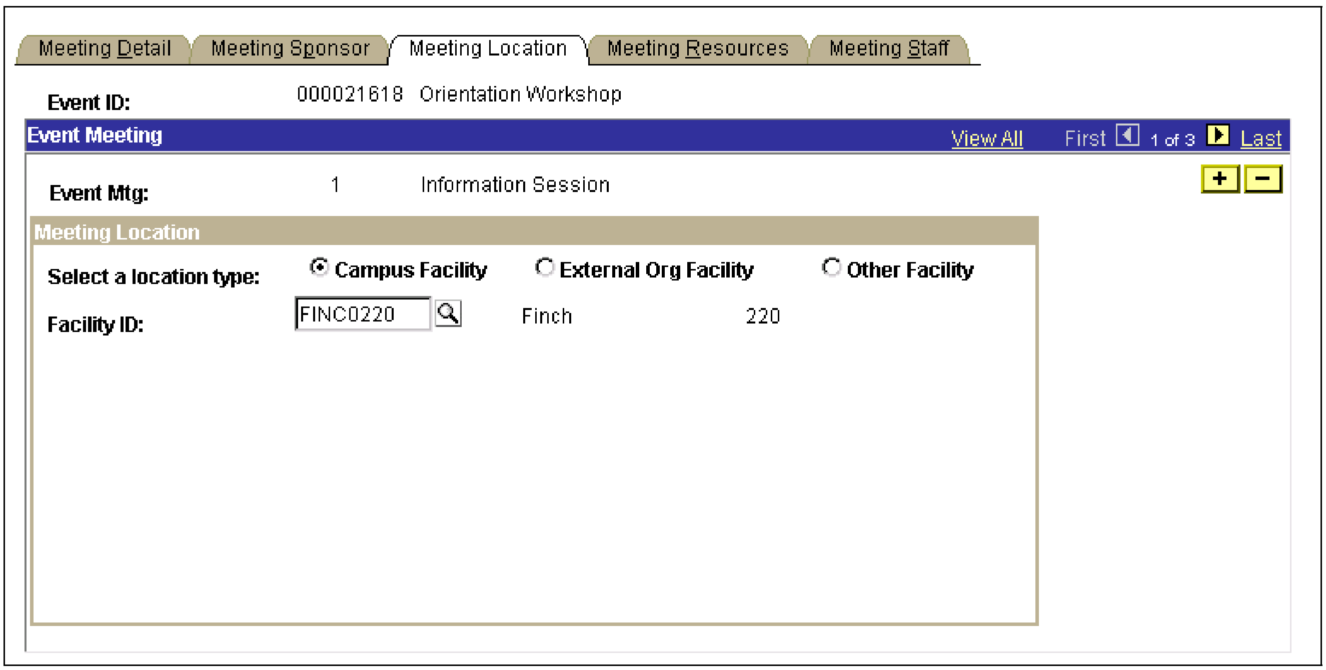
Other Coordinator — The additional individual at your institution who is responsible for, or can be contacted regarding, this meeting.

Name — The name of the additional contact individual if the individual does not exist in your database.

Phone — The phone number of the additional contact individual if the individual does not exist in your database.

Entering the Meeting Location

Access the Meeting Location page.



Meeting Location page

Campus Facility — When selected, indicates that the location for this meeting is a campus facility.

When you select *Campus Facility,* the system provides the Facility ID field with a prompt list of facility IDs from the Facility Table page.

External Organization Facility — When selected, indicates that the location for this meeting is a facility at or arranged by an external organization.

When you select External Org Facility option, the system displays the organization ID and description from the Meeting Sponsor page and provides the External Org Location field with a prompt list of locations for the organization from the Organization Locations page. When you select a location number, the system displays the address for that location.

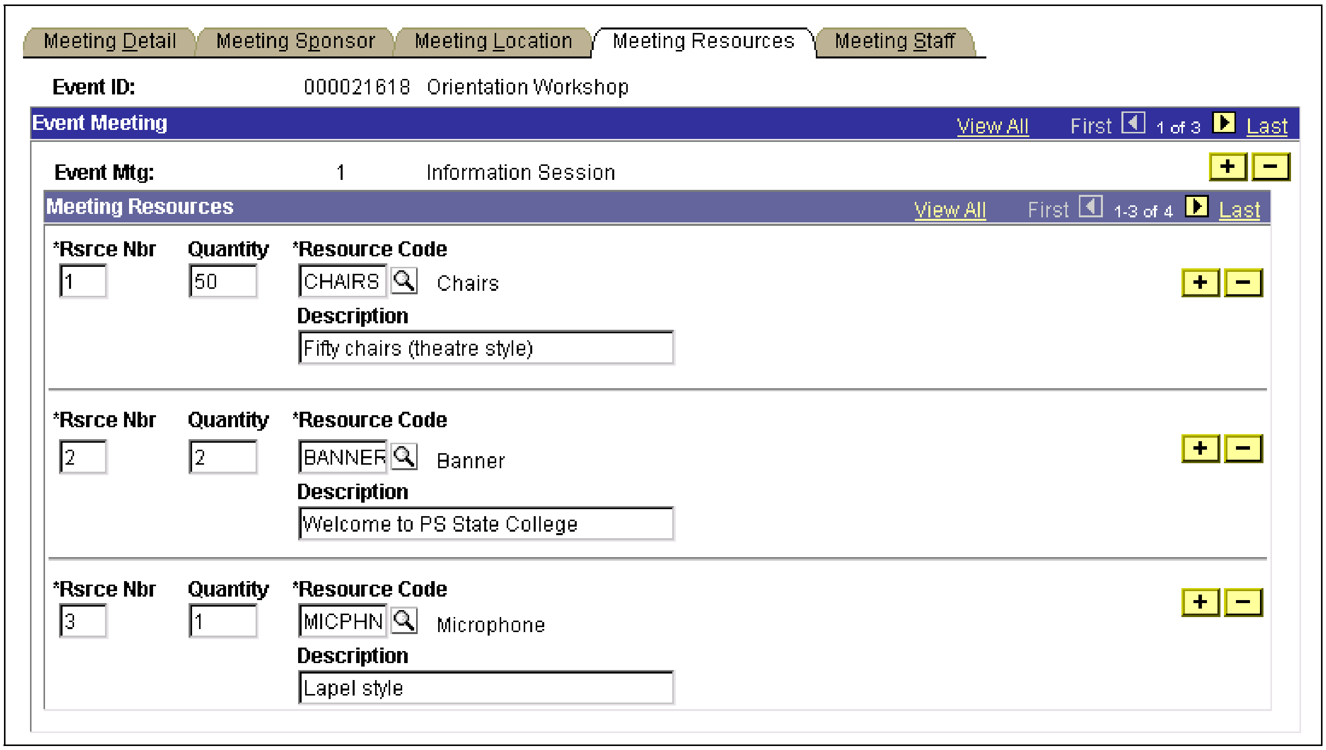
Other Facility

When selected, indicates that the location for this meeting is a facility other than at your campus or at an external organization in your database.

When you select the Other Facility option, the system displays address fields for you to identify the address or location of the facility.

Scheduling the Meeting Resources

Access the Meeting Resource page.



Meeting Resources page

Resource Number

The number of this resource in the list of resources for this meeting.

The system automatically enters the next sequential number for each resource that you add. You can override the number to reorder the list of resources. When you return to the page, the resources are in the specified order.

Quantity

The number or quantity of the resource required for this meeting.

Resource Code

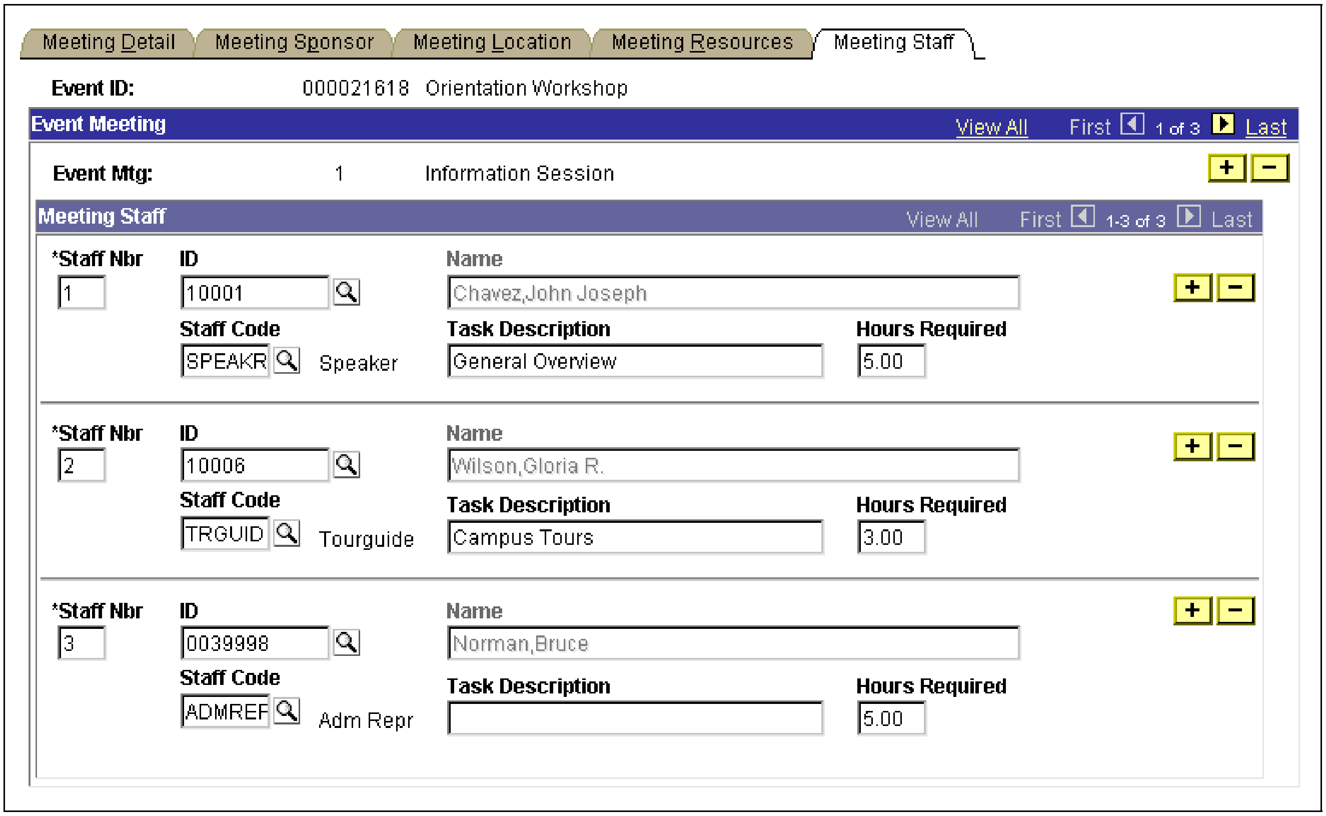
The type of resource, from the Resource Codes page, required for this meeting.

Description

A brief description to further identify or describe this resource.

Scheduling Meeting Staff

Access the Meeting Staff page



Meeting Staff page

Staff Number

The number of this staff person in the list of staff required for this meeting.

The system automatically assigns the next sequential number to each staff member that you add. You can override these numbers to rearrange the order of the staff. When you return to the page, the staff members are in the specified order.

ID

The ID of the staff member responsible for this task.

Name

The system automatically displays the individual's name when you select the ID.

If the individual does not have an ID your system, you can enter his or her name this field.

Staff Code

The type of staff required for this meeting.

Task Description

The task that the staff member is required to perform or participate in for this meeting.

Hours Required

The number of hours that the responsible individual is required to perform or participate in this task.

Tracking Event Attendance

This is how you track attendance for an event:

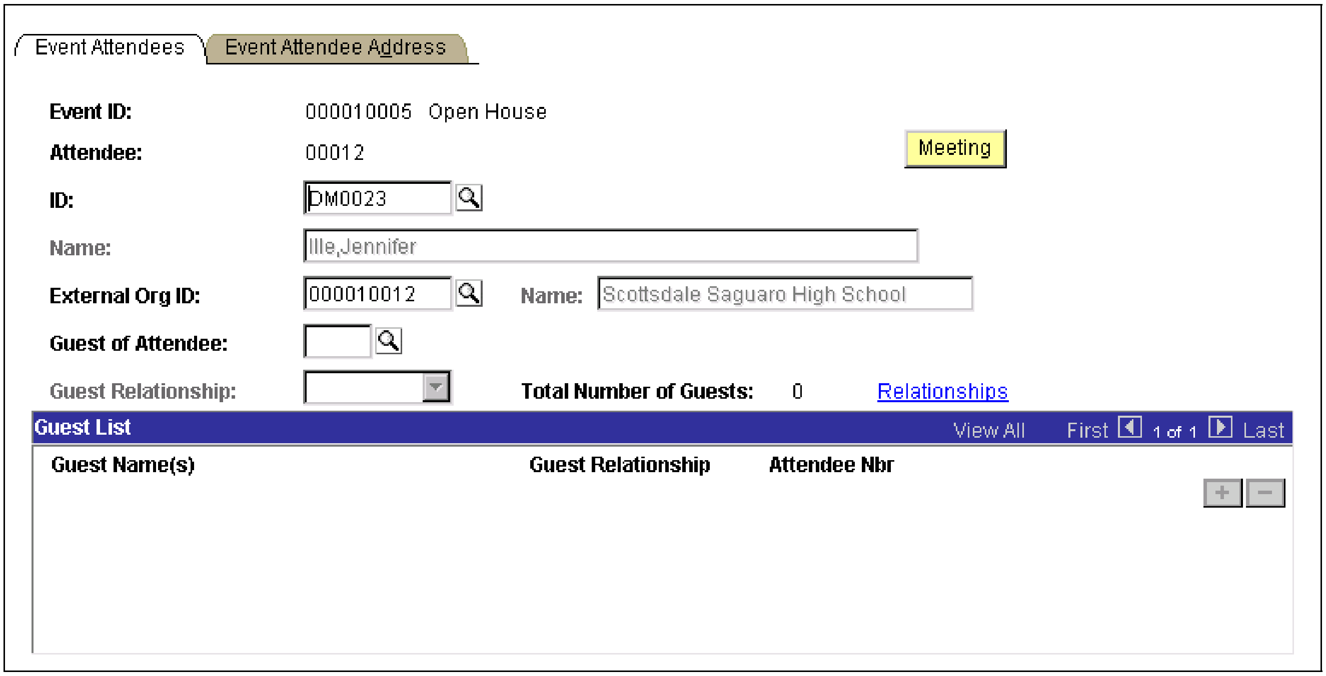
- Identify attendees and guests.
- Specify meetings for an attendee and review attendance status.
- (Optional) Enter an attendee's address.

Pages Used to Track Event Attendance

Page Name	Object Name	Navigation	Usage
Event Attendees	EVENT_ATTENDEE	• Build Community, Events, Use, Event Attendance, Event Attendees • Manage Contributor Relations, Manage Events, Use, Event Attendance, Event Attendees	Identify individuals invited or scheduled to attend an event, and specify their guest relationships, if any.
Attendee Meetings	EVENT_MEETING1_SEC	Click the Meeting button on the Event Attendees page.	Identify the meetings to which an attendee is invited and the status of his or her attendance.
Event Attendee Address	EVENT_ATND_ADDR	• Build Community, Events, Use, Event Attendance, Event Attendee Address • Manage Contributor Relations, Manage Events, Use, Event Attendance, Event Attendee Address	Enter and track attendee addresses for an event.

Identifying Attendees and Guests

Access the Event Attendees page.



Event Attendees page

Attendee

The number of this individual on the list of attendees for this event. For example, attendee 00015 is the 15^{th} attendee on the list of attendees in your system for this event.

Note. If you are entering an attendee for the first time, the Attendee field is all zeros. Do not override this value. After you enter data and save the page, the system will assign and display the next sequential attendee number.

Meeting

Click to access the Attendee Meetings page where you can identify the meetings to which the attendee is invited.

ID

The attendee's ID, if he or she exists in your database.

Name

When you select the attendee's ID, the system automatically displays the individual's name here.

If the attendee does not exist in your database, you must enter the attendee's name here.

External Organization ID

The organization's ID, if the attendee is from an organization in your database.

Name

When you select the organization's ID, the system automatically displays the organization's name here.

If the organization does not exist in your database, you must enter the organization's name here.

Guest of Attendee

The attendee number of the individual whose guest this individual is. An attendee can have multiple guests.

Note. You must first create guests as new entries on the list of attendees. You can then select them from that list and associate them as guests of the attendee described on this page.

Guest Relationship

The relationship between the host attendee and the guest attendee. If a guest is identified, the guest relationship is required. If you do not know the relationship, select *Unknown.*

When you save the page, the system lists all guests of the host attendee at the bottom of this page.

Values for this field are delivered with your system as . You can modify these.

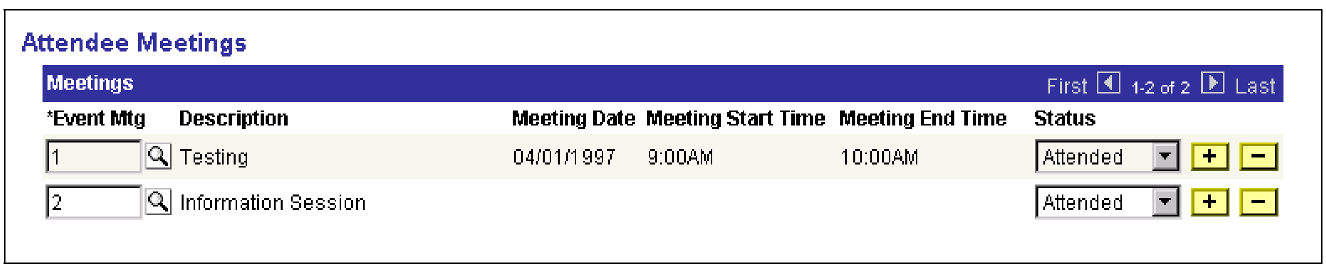
Relationships

Click this link to access the Relationships search box page, where you can create or review a relationship between the two individuals in your database.

Guest Relationship values are independent of the relationships that you set up on the Relationships page. Guest relationship is a quick method of identifying the association between two attendees specifically for an event.

Specifying Meetings for an Attendee and Reviewing Attendance Status

Access the Attendee Meetings page.



Attendee Meetings page

Event Meeting

The number of the meeting to which you want to invite the attendee.

When you select the meeting, the system automatically displays the description, date, and start and end times for that meeting from the Meeting pages.

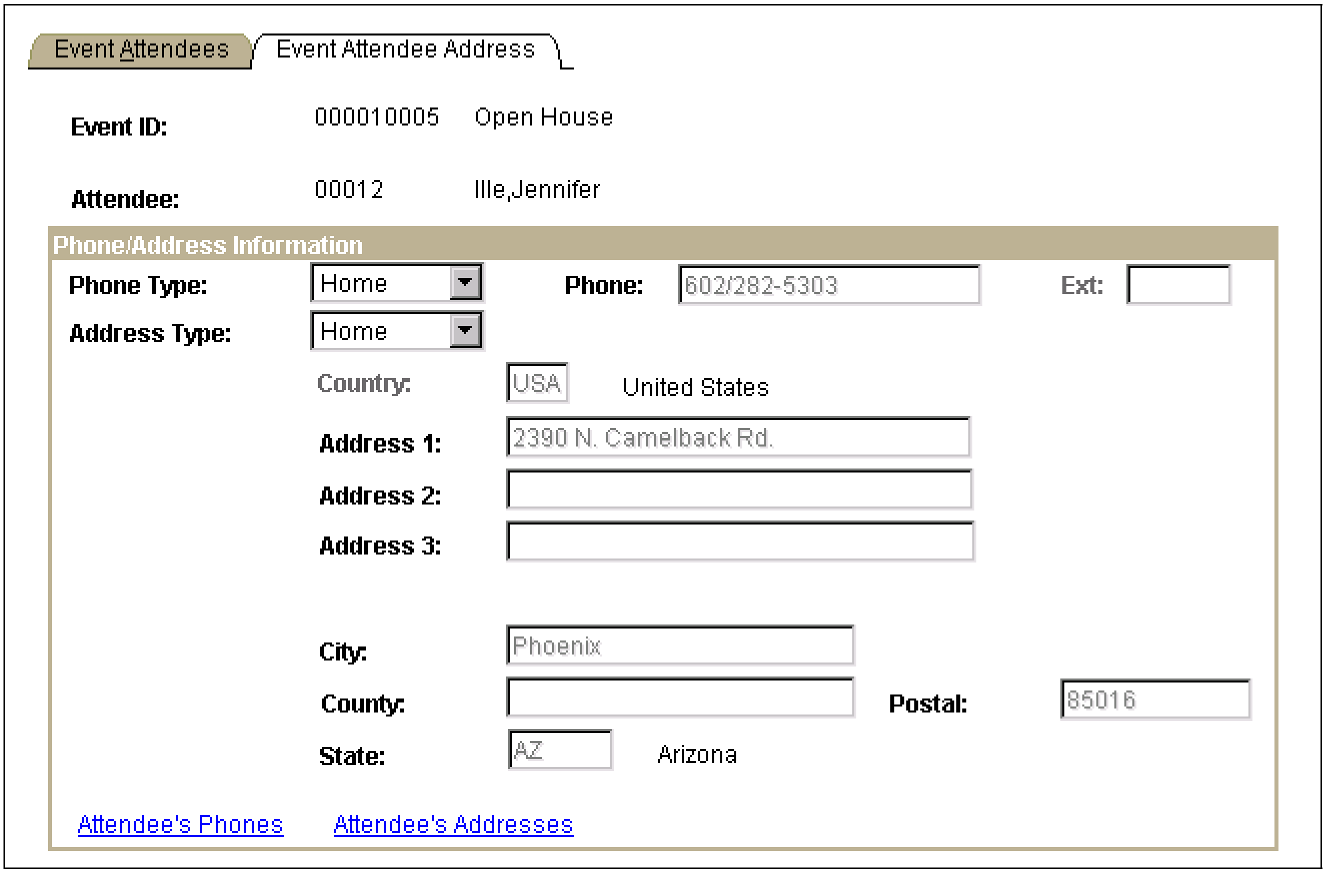
Status

The status of the individual's attendance for this meeting. Status values are *Attended, Invited, Not Attend,* and *Will Attend.*

Values for this field are delivered with your system. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Entering an Attendee's Address (Optional)

Access the Event Attendee Address page.



Event Attendee Address page

Phone Type

The phone number to use for contacting this attendee.

If the attendee has an ID in your database, the system displays the *Home* phone type and home phone number associated with the home address specified on the Installation Table − SA Options page. You can select a different phone type.

If the attendee does not have an ID in your database, enter the phone number manually.

Address Type

The address to use for contacting this attendee.

If the attendee has an ID in your database, the system displays the *Home* address type and home address data specified on the Installation Table − SA Options page. You can select a different address type.

If the attendee does not have an ID in your database, enter the address manually.

Attendee's Phones

Click to access the Phone Number page, where you can add or edit the phone numbers for this attendee.

Attendee's Addresses

Click to access the Addresses page, where you can add or edit the address data for this attendee.

Reviewing Events, Meetings, and Attendees

After you enter events data, you can review the information in several ways. You can review events by facility, review all meetings or all attendees for an event, or review attendees for a meeting. You can even search meetings and events to determine if a specific individual is an attendee.

This section discusses how to:

- Reviewing events by facility and meeting date.
- Review event meetings.
- Review attendees for an event.
- Review attendees by meeting.
- Review event meetings for an attendee.
- Review an attendee's event summary.
- Review an attendee's guests.

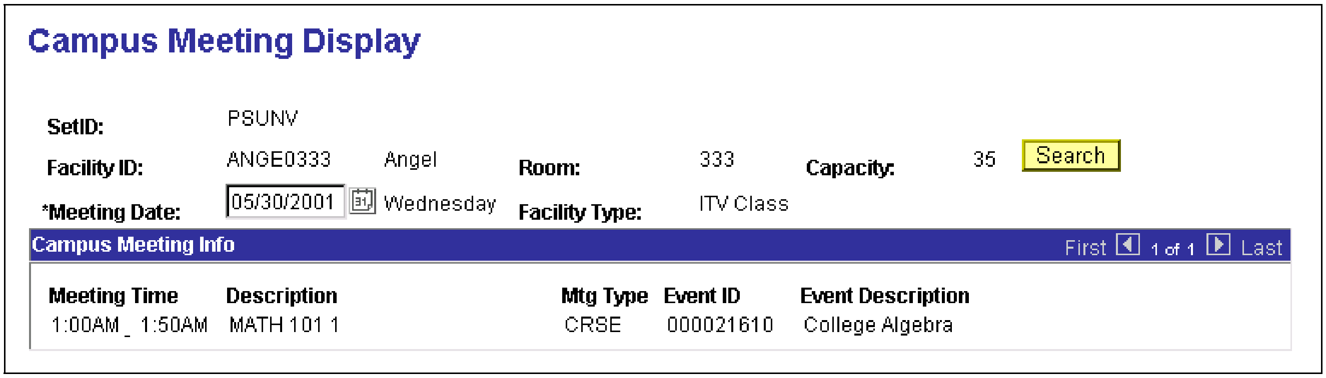
Pages Used to Review Events, Meetings, and Attendance

Page Name	Object Name	Navigation	Usage
Campus Meeting Display	CAMPUS_MTG_DSPL	• Build Community, Events, Inquire, Campus Meeting Display, Campus Meeting Display • Manage Contributor Relations, Manage Events, Inquire, Campus Meeting Display, Campus Meeting Display	Review events by facility and meeting date.
Event Meeting	CAMPUS_ATT_SUM_INI	• Build Community, Events, Inquire, Event Summary, Event Meeting • Manage Contributor Relations, Manage Events, Inquire, Event Summary, Event Meeting	Review all meetings for an event.
Event Attendee	CAMPUS_MTG_ATT_INI	• Build Community, Events, Inquire, Event Summary, Event Attendee • Manage Contributor Relations, Manage Events, Inquire, Event Summary, Event Attendee	Review all attendees for an event.

Page Name	Object Name	Navigation	Usage
Event Meeting Attendees	ATTENDEE_SUMMARY	• Build Community, Events, Inquire, Event Summary, Event Meeting Attendees • Manage Contributor Relations, Manage Events, Inquire, Event Summary, Event Meeting Attendees	Review attendees for meetings of an event.
Event Attendee Meeting	ATTENDEE_MTG_SUM	• Build Community, Events, Inquire, Event Summary, Event Attendee Meeting • Manage Contributor Relations, Manage Events, Inquire, Event Summary, Event Attendee Meeting	Review meetings scheduled for specific attendees.
Person Event Summary	PERSON_EVENT_SUMM	• Build Community, Events, Inquire, Person Event Summary, Person Event Summary • Manage Contributor Relations, Manage People, Inquire, Person Event Summary, Person Event Summary • Manage Contributor Relations, Manage Events, Inquire, Person Event Summary, Person Event Summary • Develop Enrollment, Evaluate Applicants, Inquire, Person Event Summary, Person Event Summary • Develop Enrollment, Process Applications, Inquire, Person Event Summary, Person Event Summary • Develop Enrollment, Recruit Prospective Students, Inquire, Person Event Summary, Person Event Summary	Review all of the events for which an individual is an attendee. This information is useful for viewing a summary of the individual's meeting schedule.
Attendee Meetings	EVENT_MEETING2_SEC	Click the Meeting button on the Person Event Summary page.	Review the specific meetings that an individual is scheduled to attend at an event.
Attendee Guests	ATTENDEE_GUEST_SEC	Click the Guest button on the Person Event Summary page.	Review all guests assigned to an individual for an event.

Reviewing Events by Facility and Meeting Date

Access the Campus Meeting Display page



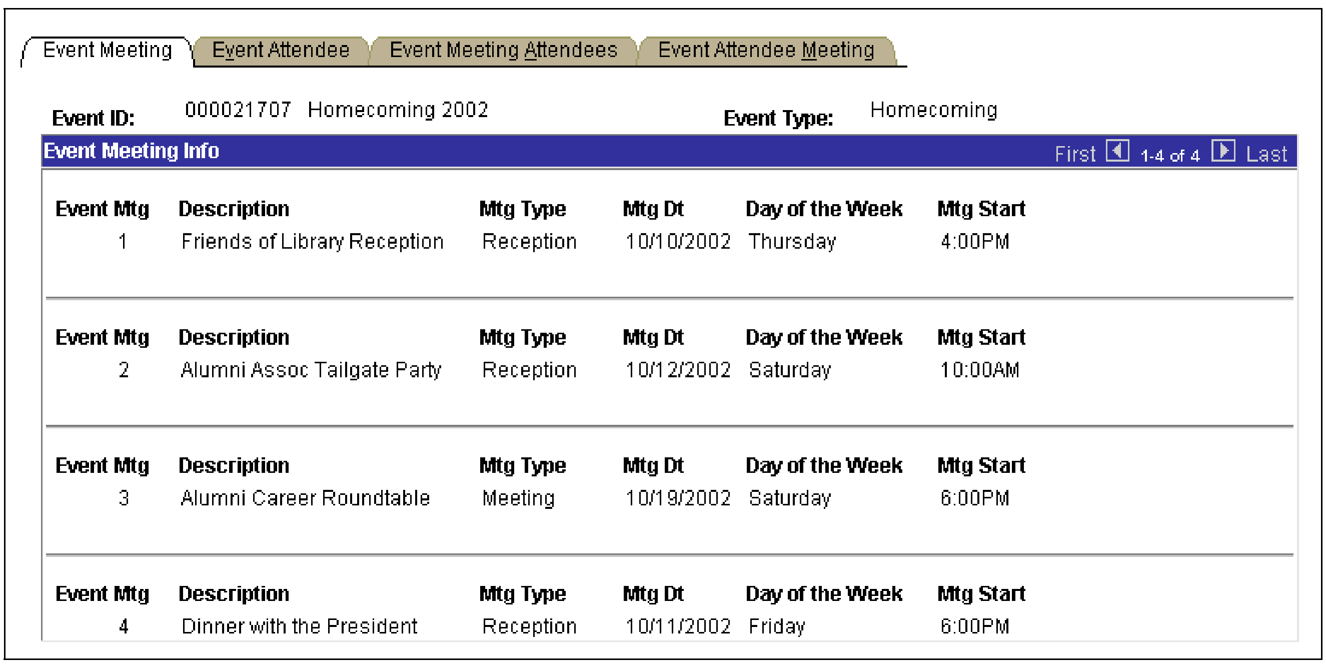
Campus Meeting Display page

Meeting Date The calendar date to review to determine if any meetings are scheduled for this facility.

Search Click this button to launch the search for meetings scheduled for the specified calendar date. If the system finds meetings scheduled for that date, it displays the data in the Campus Meeting Info scroll area at the bottom of the page.

Reviewing Event Meetings

Access the Event Meeting page.

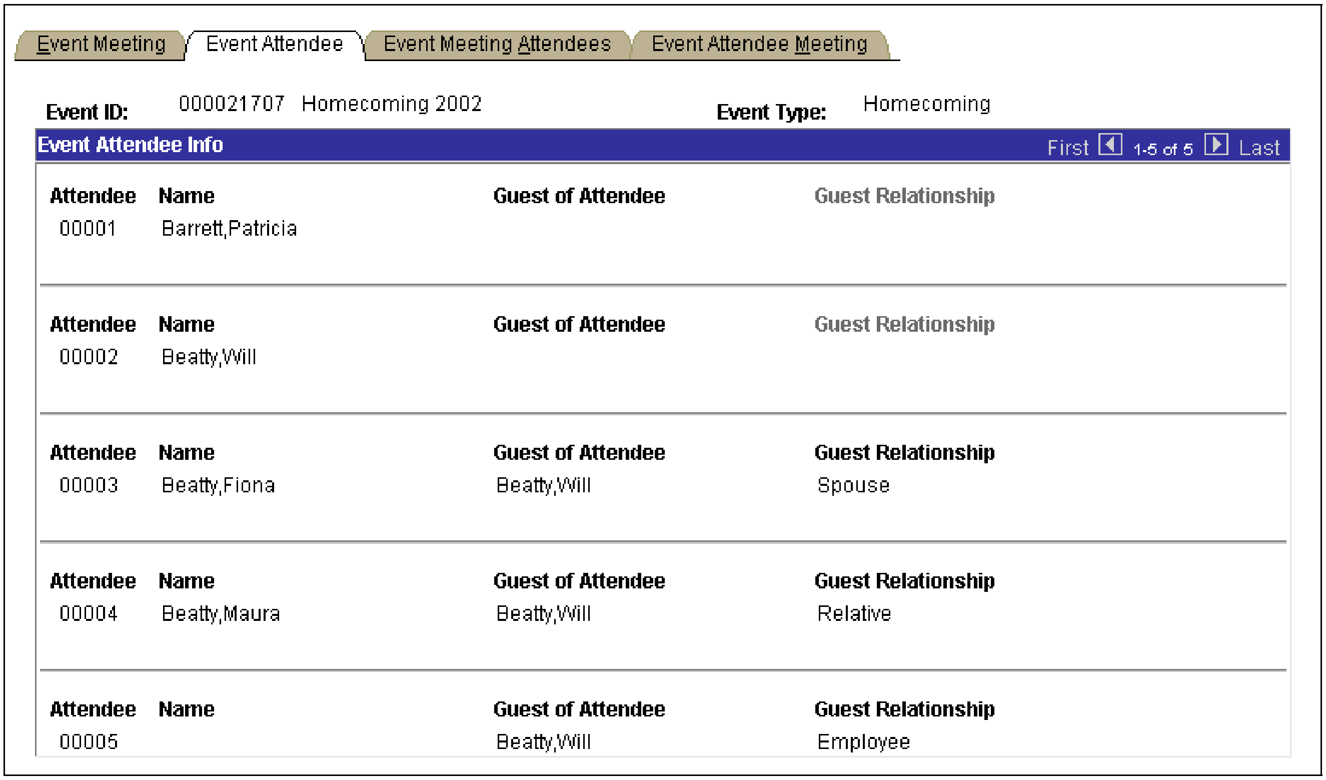


Event Meeting page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Attendees for an Event

Access the Event Attendee Page.

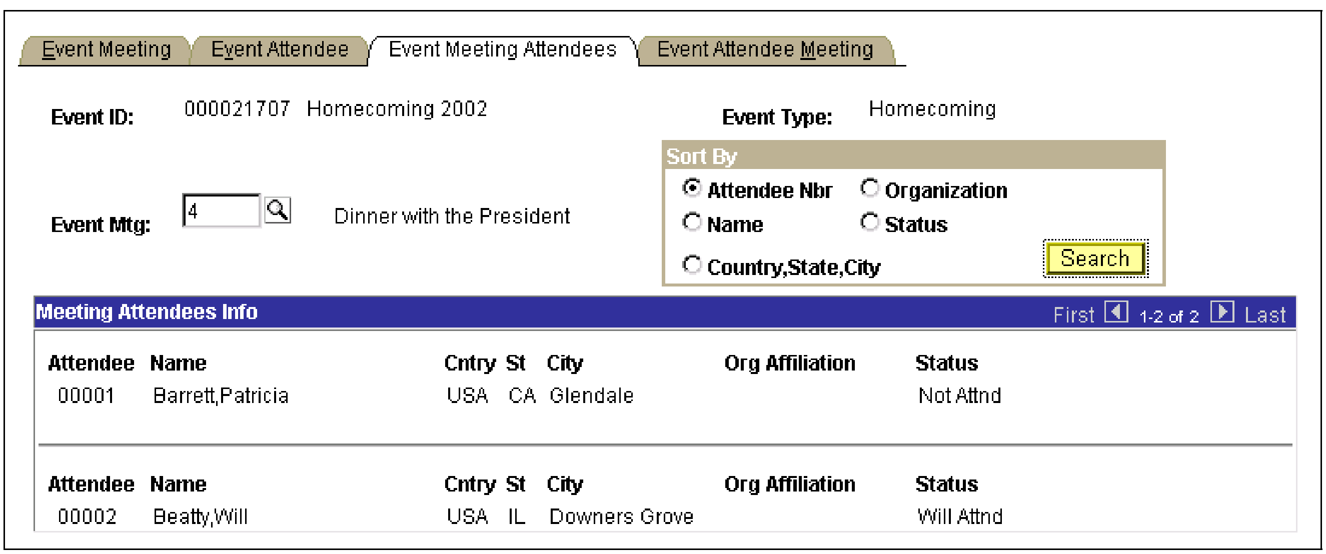


Event Attendee page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Attendees by Meeting

Access the Event Meeting Attendees page.



Event Meeting Attendees page

Event Meeting The number of the meeting whose attendees you want to review. An event meeting number is required.

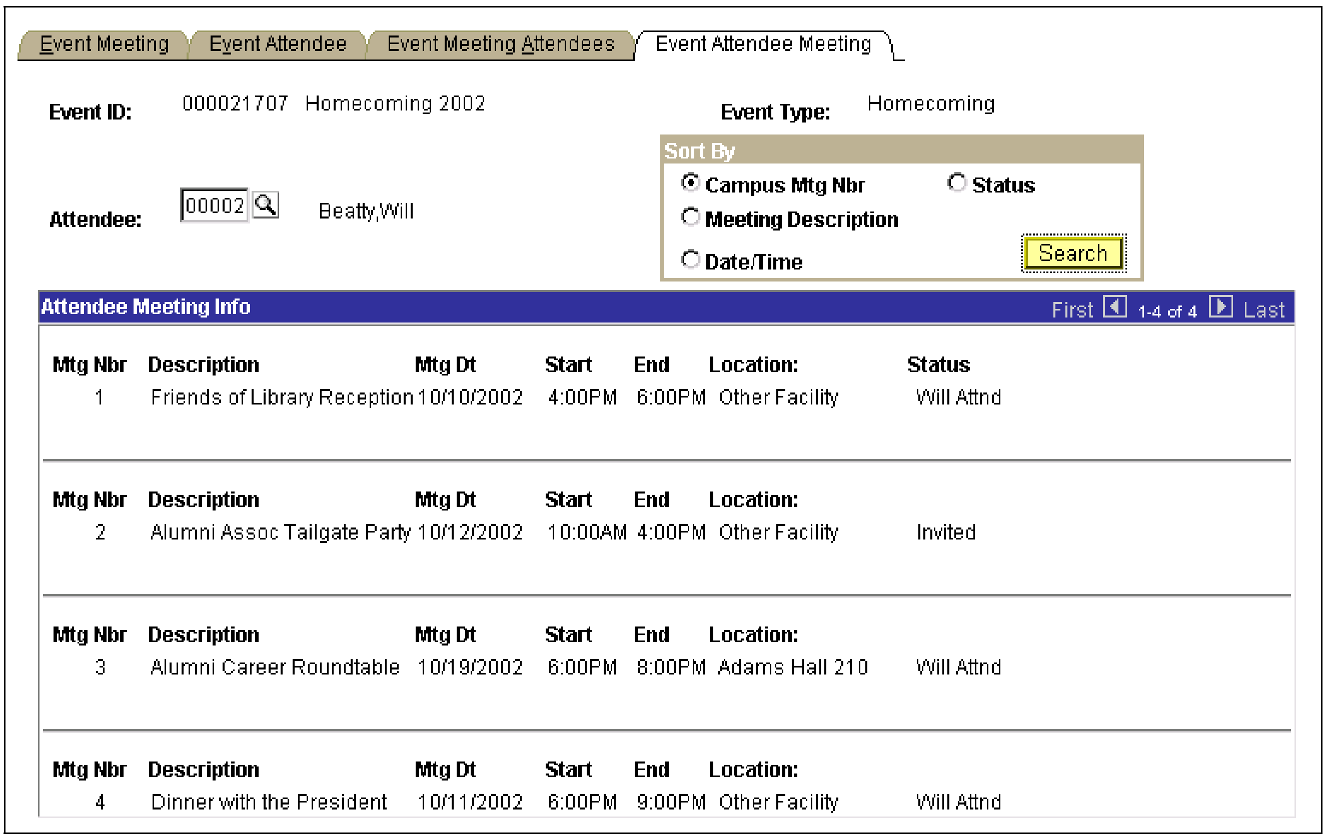
Sort By

Select how you want the system to sort the results.

Search Click this button to launch the search based on the criteria that you selected.

Reviewing Event Meetings for an Attendee

Access the Event Attendee Meeting page



Event Attendee Meeting page

Attendee The attendee number of the attendee whose meetings you want to review. An attendee number is required.

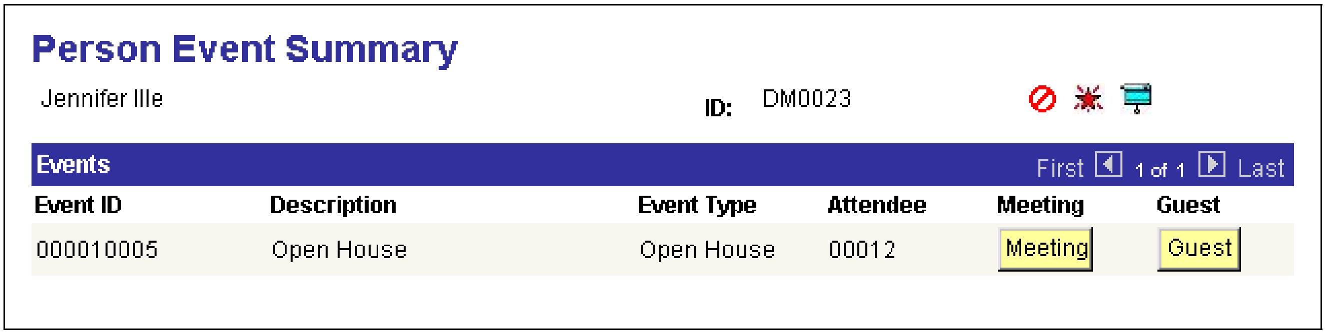
Sort By

Select how you want the system to sort the results.

Search Click this button to launch the search based on the criteria you selected.

Reviewing an Attendee’s Event Summary

Access the Person Event Summary page.



Person Event Summary

Jennifer Ille ID: DM0023

Events First 1 of 1 Last

Event ID	Description	Event Type	Attendee	Meeting	Guest
000010005	Open House	Open House	00012	Meeting	Guest

Person Event Summary page

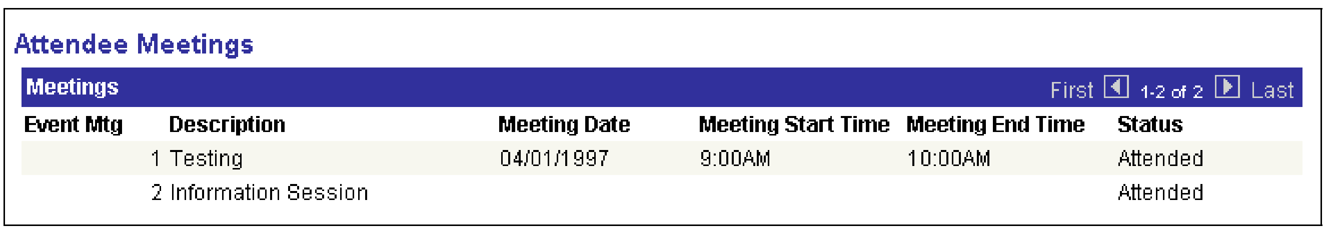
This page is for viewing purposes only. You cannot enter or modify data here.

Meeting Click to access the Attendee Meetings page, where you can view the specific meetings that the individual is scheduled to attend at an event.

Guest Click to access the Attendee Guests page, where you can view all guests that have been assigned to this individual for an event.

Reviewing an Attendee's Event Meetings Summary

Access the Attendee Meetings page.



Attendee Meetings

Meetings First 1-2 of 2 Last

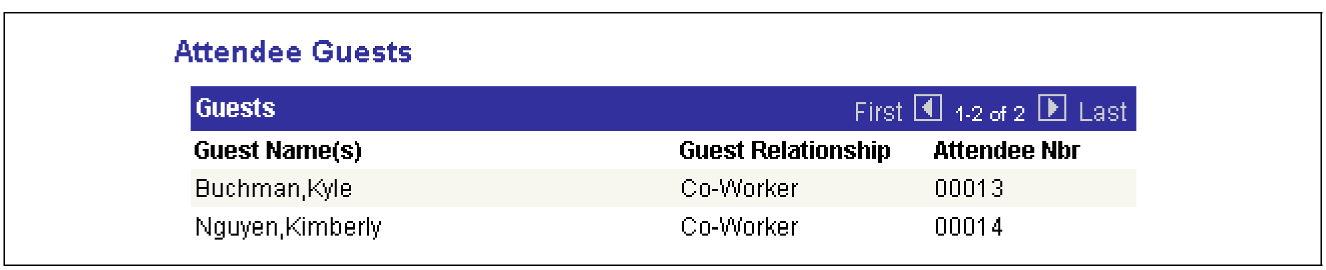
Event Mtg	Description	Meeting Date	Meeting Start Time	Meeting End Time	Status
1	Testing	04/01/1997	9:00AM	10:00AM	Attended
2	Information Session				Attended

Attendee Meetings page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing an Attendee's Guests

Access the Attendee Guests page.



Attendee Guests

Guests First 1-2 of 2 Last

Guest Name(s)	Guest Relationship	Attendee Nbr
Buchman,Kyle	Co-Worker	00013
Nguyen,Kimberly	Co-Worker	00014

Attendee Guests page

This page is for viewing purposes only. You cannot enter or modify data here.

Viewing Events Reports

You can generate the following reports to review information in the Events component of your PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions system.

- Event Type Table report (CC723).
- Resource Code Table report (CC724).
- Staff Code Table report (CC725).

See Also

Appendix A, "PeopleSoft Campus Community Reports," page 531

CHAPTER 38

Understanding PeopleSoft Campus Community Collaborative Applications

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer a suite of role-based and function-based collaborative applications that enable you to provide users self-service access to the information and transactions over the internet. By grouping transactions into collaborative applications based on function and user roles, you can offer a one-stop shopping approach to the online transactions users need and perform most. Allowing users to complete transactions from self-service applications significantly reduces the time that your administrative staff must spend performing administrative tasks.

You can present the collaborative applications as delivered or modify them to present specific features that your institution wants to make available through self-service.

PeopleSoft Campus Community offers the following collaborative applications.

- PeopleSoft Community Access Collaborative Application.
- PeopleSoft Personal Portfolio Collaborative Application.
- PeopleSoft Community Directory Collaborative Application.

Note. Collaborative applications for PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions are licensed separately. Your institution can pick and choose which collaborative applications it wants, or it can license the entire suite of applications to fully leverage the power of their collaborative design. If you have licensed a collaborative application, you can use the self-service pages described here.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Introducing Collaborative Applications”

Chapter 39, “Using PeopleSoft Community Access Collaborative Application,” page 495

Chapter 40, “Using PeopleSoft Personal Portfolio Collaborative Application,” page 509

Chapter 41, “Using PeopleSoft Community Directory Collaborative Application,” page 523

CHAPTER 39

Using PeopleSoft Community Access Collaborative Application

This chapter provides an overview of PeopleSoft Community Access Collaborative Application and discusses how to:

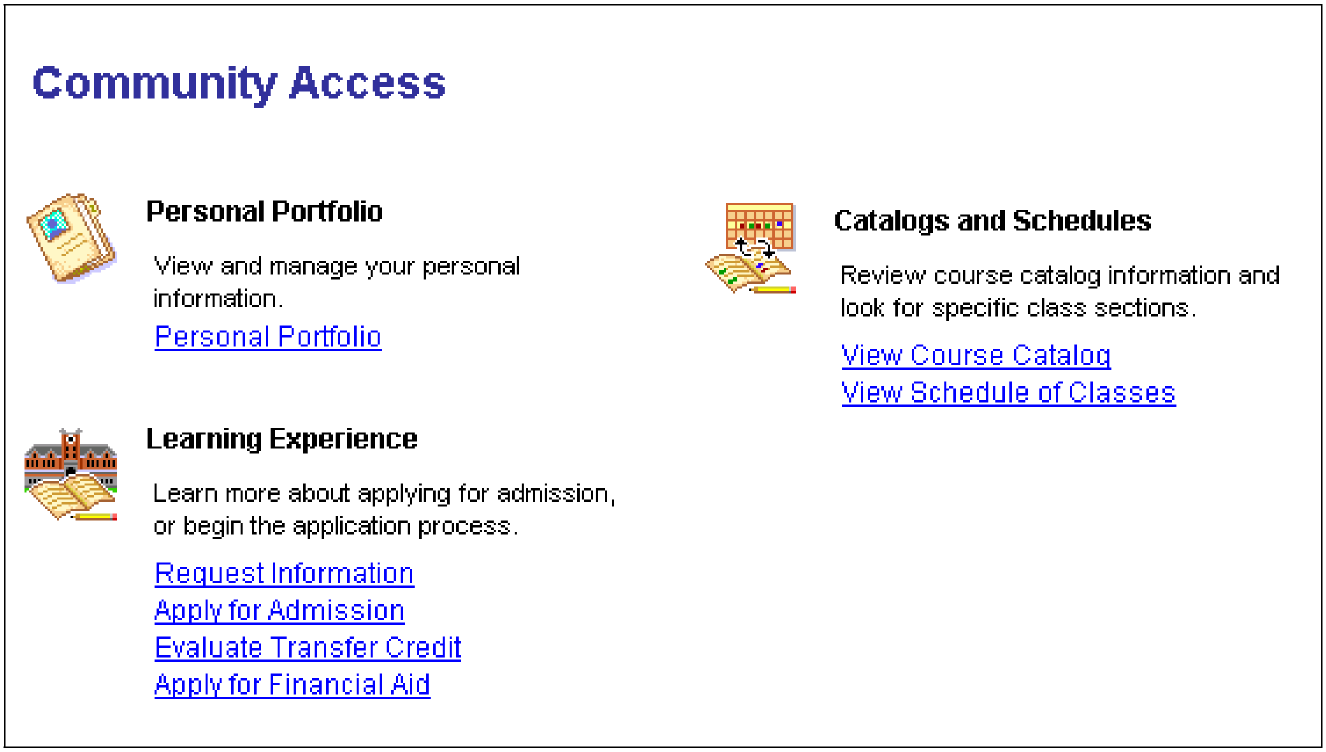
- Install new user registration.
- Configure new user registration.
- Obtain access to self-service transactions.
- Investigate new user registration data.
- Purge new user creation records.

Understanding PeopleSoft Community Access Collaborative Application

The PeopleSoft Community Access Collaborative Application enables visitors, wanting to become acquainted with your institution, to complete a quick new user registration process to gain limited access to useful information. For example, prospective students might be looking for the fastest way to learn how their current credits might transfer, what courses you offer, how they can request more information, and even how to apply to your institution. Community Access enables you to provide all of that to them in an online self-service environment. The transactions that you provide are limited only by the services that your institution chooses to offer.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. To use the New User Registration feature, you need to license PeopleSoft Community Access Collaborative Application. The present the transactions shown on the sample Community Access homepage, you need to also license PeopleSoft Personal Portfolio Collaborative Application and PeopleSoft Learner Services Collaborative Application. You can then use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.



Community Access homepage

This section describes how to set up and use the New User Registration process required to give visitors access to the self-service transactions that you present on the Community Access homepage.

See Also

Chapter 40, "Using PeopleSoft Personal Portfolio Collaborative Application," page 509

Understanding Self-Service New User Registration

For a visitor to apply for admission or access other features on the PeopleSoft Community Access Collaborative Application homepage, he or she needs to exist in your database. To exist in your database, the visitor must become a registered user. New User Registration enables visitors to generate a user ID and password to create themselves in your database and to obtain a role with relevant access to your self-service transactions. Realtime processes detect duplicates, and create records and IDs. Administrative utilities assist you in managing ID creation for possible duplicates and purging your visitor creation table.

Here's how it works:

1. Install your PeopleSoft internet Architecture (PIA) site as you would for any PeopleSoft Collaborative Application.
2. Install a secondary PIA site and modify the second site to provide visitors with limited access to complete the registration process.
3. Configure the administrative User Registration page to list fields for your institution's required data on the self-service New User Registration page.

If you add or remove fields on the User Registration page, you must also modify criteria to include or delete those field values on the Search/Match Criteria page and related processing.

4. Create a link on your institution's publicly accessible site pointing to the self-service New User Registration Data page.

   When a visitor clicks the link, the New User Registration Data page appears. The visitor enters the required information and submits the data. When the visitor submits the data, the system runs a search/match process against your existing database. If the process finds duplicate data, the system suspends the data and displays the User Registration page (for unsuccessful registration), giving the visitor the appropriate message and system-issued reference number. If the process does not find duplicate data, it grants the visitor a userID and password and assigns a role with the relevant access predefined by your institution. In only a few seconds, the registration process completes. The Community Access homepage appears, and the prospect can click links to access his or her personal portfolio (if you have licensed PeopleSoft Personal Portfolio Collaborative Application), apply for admission, request more information from your institution, and so on.

Installing New User Registration

To create a secure site for new user registration you must install a second instance of the PeopleSoft internet Architecture (PIA) site. Guests attempting to register interact with this second site. In subsequent logins, users interact with your primary site. By maintaining two sites you maintain control over the exposure of your database those not yet fully verified in your system.

PIA pages build dynamically from the underlying database objects. Therefore you need to maintain only a few minor differences in the second site.

First, install the second PIA site specifying a new destination folder for your PeopleSoft internet Architecture web Server files. For example, if in your primary installation of PIA you entered a destination folder of *../Tester* (where ".." is the path to the web server root directory), you might specify a destination folder of *../newuser* for your second site.

After installing the second PIA site, modify the files as follows:

In configuration.properties,under General Settings:

```
psserver = machinename:port
```

where machinename is the name of the server and port is the appropriate port for that server (this will probably be set automatically during the install process)

under Debug/Trace Settings:

```
signontrace_page=directlink.html
```

under Sign In Settings:

```
signon_page=directlink.html
signonError_page=exception.html
logout_page=directlink.html
```

under Navigation Settings:

```
start_page=directlink.html
```

under Security Settings:

```
byPassSignOn=true
defaultUSERID=NEWUSERREG
defaultPWD=NEWUSERREG
```

PeopleSoft delivers the following values with PeopleSoft Community Access Collaborative Application:

- User ID = NEWUSERREG
- Assigned Role = NEW_USER_REG
- Primary Permission List = NEWUSER

The system uses the delivered user ID to log guests in behind the scenes giving them access enough to your PIA site to participate in the registration process. You can create a new user ID for use in the background log in or you modify the following for your use:

- Roles associated with the delivered user ID.
- Permissions lists associated with the delivered role.
- Permissions associated with the delivered permission list.

If you choose to create a different user ID and password, you must also set the defaultUserID and defaultPWD values in the configuration.properties file accordingly.

Setting signon_page = directlink.html in configuration.properties takes the user directly to the self-service New User Registration page, bypassing signon and signing the user in, in the background, with the user ID and password noted under Security Settings.

In directlink.html, after the comment section on copyright, edit the remainder of the file so that it reads as follows where <machinename> is the name of the server on which the PIA installation of your new user site is located, and <sitename> is the name of the folder where the installation exists.

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 3.2//EN">
<html>
<META HTTP-EQUIV=Refresh CONTENT="1; URL=http://<machinename>/servlets/iclientservlet
/<sitename>?ICType=Panel&amp;target=main&amp;Menu=COMMUNITY_ACCESS&amp;Market=GBL&amp;
PanelGroupName=VID_DATA_ENTRY">
</html>
```

Finally, on your publicly accessible internet site, add a link to the directlink.html page of the second PIA site to enable potential new users to access the New User Registration functionality.

See Also

PeopleSoft PeopleTools PeopleBook, "Administration Tools, PeopleSoft Internet Architecture Administration, Web Server Administration"

Configuring New User Registration

This section provides an overview of new user registration configuration and discusses how to:

- Review installation default settings.
- Review or adjust search/match criteria.

Understanding New User Registration Configuration

You must specify the role, primary permission, and user contact settings to grant newly created users so they can obtain access to your self-service transactions. You must also select the address, email address, and phone number types to which data entered during registration will correspond.

New user registration uses search/match functionality to assist in detecting possible duplicate records. You must configure search/match definitions and field-level parameters to conduct a search for realistic duplicates. The sample search/match definition levels delivered with your system are optimized for use with the data requested on the sample User Registration page. Review and adjust these to fit the data that your institution requires for new user registration. If you add or delete fields on the delivered User Registration page, be sure to include or delete the same fields in the search/match definition levels.

For example, if you set the first name and last name character search parameters to the first two characters and first three characters respectively, your system returns a large number of possible duplicate warnings. Changing the parameters to four and five characters respectively narrows the search and significantly reduces the number of hits while still detecting true potential duplicates.

See Also

Chapter 2, "Designing PeopleSoft Campus Community," page 5

Chapter 4, "Setting Up Search/Match Criteria," page 43

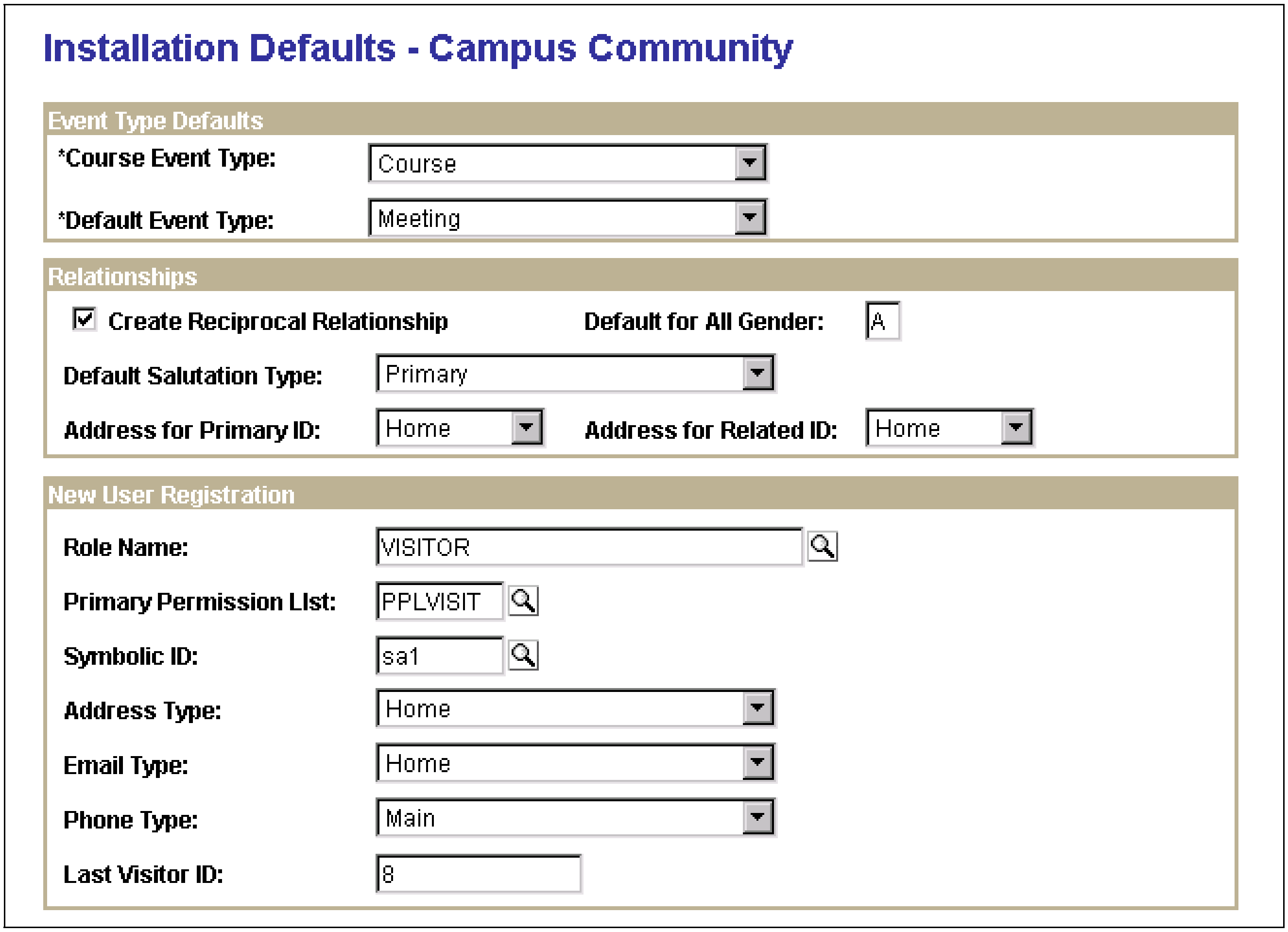
PeopleTools PeopleBook, "Administration Tools, Security"

Pages Used to Configure New User Registration

Page Name	Object Name	Navigation	Usage
Installation Defaults – Campus Community	INSTALLATION_CC	Design Student Administration, Define Campus Community, Setup, Installation Defaults – CC	Review or change the default settings for New User Registration.
Search/Match	SEARCH_TABLE	Design Student Administration, Establish People Processing, Setup, Search/Match Criteria	Confirm or adjust the search/match criteria and search order levels for successful detection of reasonable duplicates of self-service records

Reviewing Installation Default Settings

Access the Installation Defaults – Campus Community page.



Installation Defaults – Campus Community page

New User Registration

Role Name

Specify the role to use for newly registered self-service users. The role determines the type of data exposed to the user.

The default value delivered with your system is *Visitor.* You can override this.

Primary Permission List

Specify the primary permission list to use for newly registered self-service users. The primary permission list grants user access to the appropriate business transactions and determines user default values.

The default value delivered with your system is *PPLVISIT.* You can override this.

Symbolic ID

Select the symbolic ID to use for newly registered self-service users.

Granting users a symbolic ID allows them to perform certain transactions using Remote Call Cobol features such as transfer credit, run degree progress report, and so on. It also grants them two-tier access to your database, though it will not permit access to any pages or processes that they would not otherwise have from a browser.

Address Type

Select the type of address to which registration data will be written.

The default value delivered with your system is *Home.* You can override this.

Email Type Select the type of email address to which registration data will be written.

The default value delivered with your system is *Home.* You can override this.

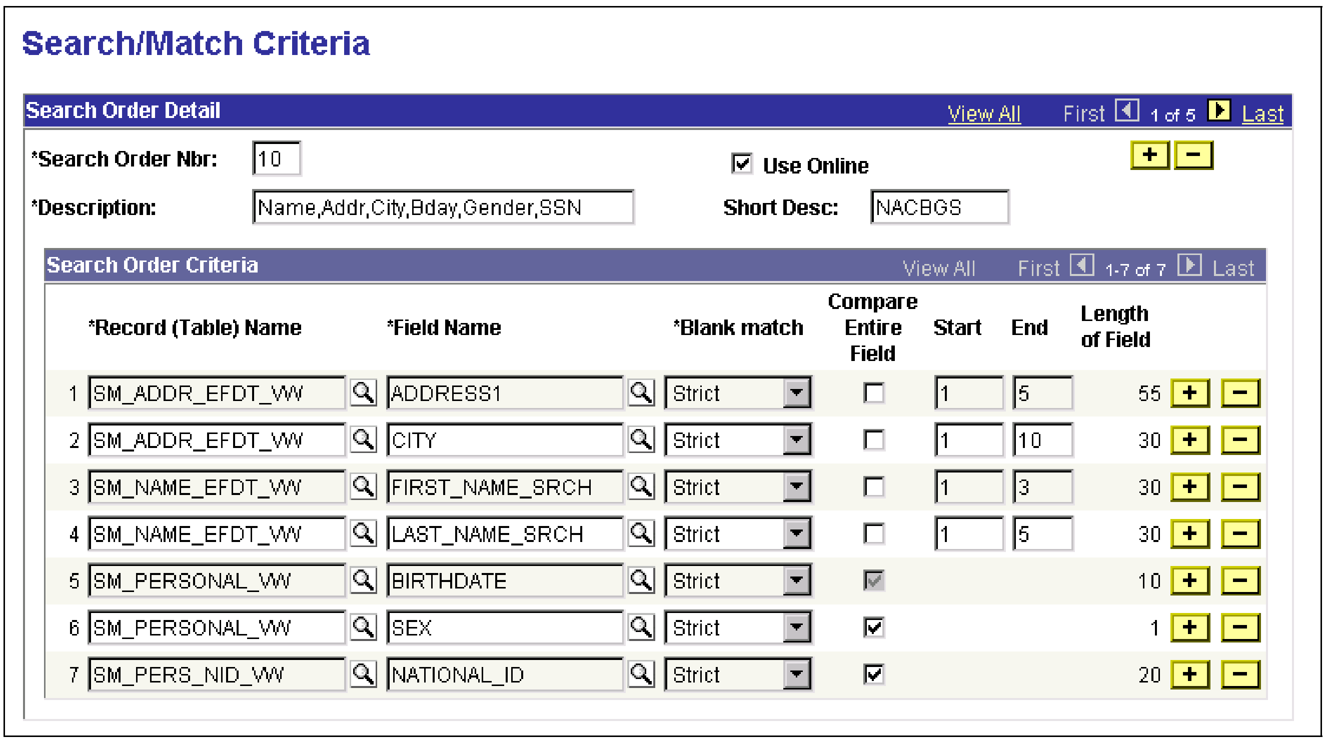
Phone Type Select the type of phone to which registration data will be written.

The default value delivered with your system is *Main.* You can override this.

Last Visitor ID Indicates the last visitor ID assigned by the system. The system increases the number sequentially by one after each new user registration attempt (successful or not).

Reviewing or Adjusting Search/Match Criteria

Access the Search/Match Criteria page.



Search/Match Criteria

Search Order Detail — View All — First 1 of 5 Last

*Search Order Nbr: 10 — Use Online (checked)

*Description: Name,Addr,City,Bday,Gender,SSN — Short Desc: NACBGS

Search Order Criteria — View All — First 1-7 of 7 Last

	*Record (Table) Name	*Field Name	*Blank match	Compare Entire Field	Start	End	Length of Field
1	SM_ADDR_EFDT_VW	ADDRESS1	Strict	☐	1	5	55
2	SM_ADDR_EFDT_VW	CITY	Strict	☐	1	10	30
3	SM_NAME_EFDT_VW	FIRST_NAME_SRCH	Strict	☐	1	3	30
4	SM_NAME_EFDT_VW	LAST_NAME_SRCH	Strict	☐	1	5	30
5	SM_PERSONAL_VW	BIRTHDATE	Strict	☑			10
6	SM_PERSONAL_VW	SEX	Strict	☑			1
7	SM_PERS_NID_VW	NATIONAL_ID	Strict	☑			20

Search/Match Criteria page

Obtaining Access to Self-Service Transactions

This section provides an overview of self-service registration and lists the pages self-service users use to obtain access to self-service transactions.

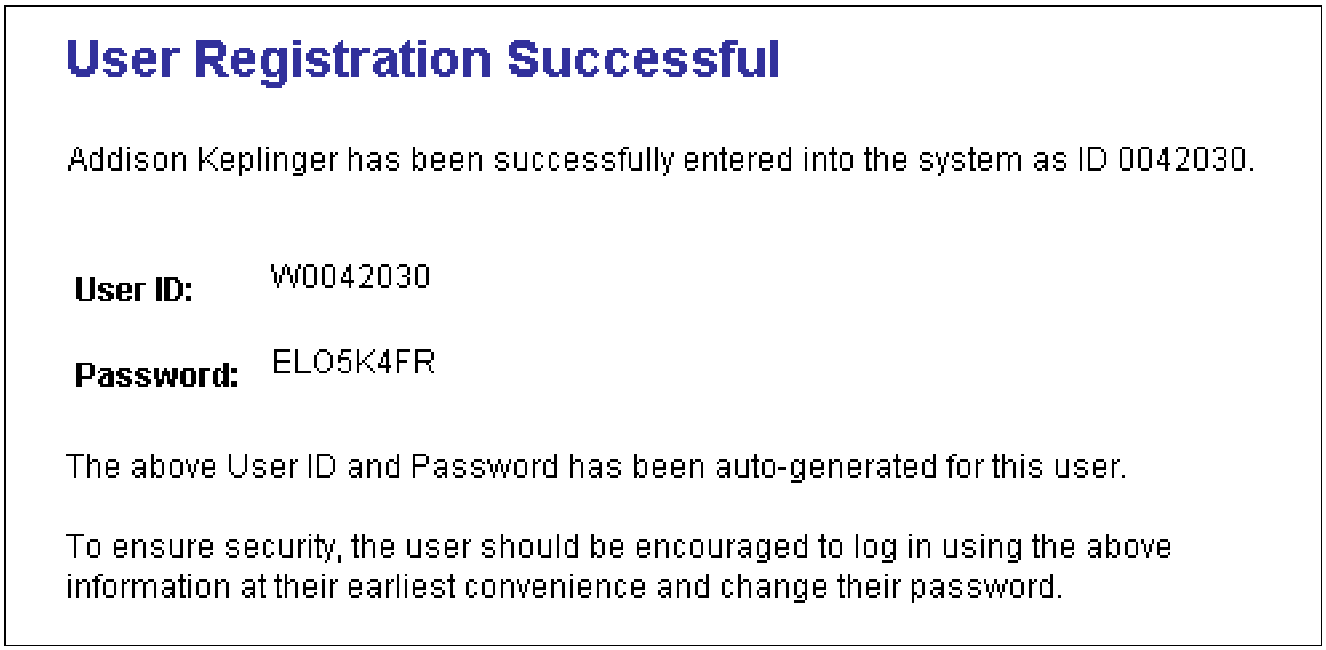
Understanding Self-service Registration

A sample Privacy Policy page is delivered with your system to help you notify potential users of your institution's policies on the use of data that may be gathered during the registration process. This page is for viewing purposes only. You cannot enter or modify text here. To modify the delivered sample, modify the appropriate message in the message catalog.

If the system finds no potential duplicate based on the data that the individual entered on the User Registration page, then the system displays the Create User Profile page, giving the user an opportunity to create a unique user ID and password.

If the user ID that the individual enters and submits already exists, the system displays the User Registration page (for unsuccessful registration), but with a message prompting the user to enter a different user ID. This process continues until the system is able to accept the unique user ID.

When the system is able to accept the user ID, it displays the User Registration Successful page.

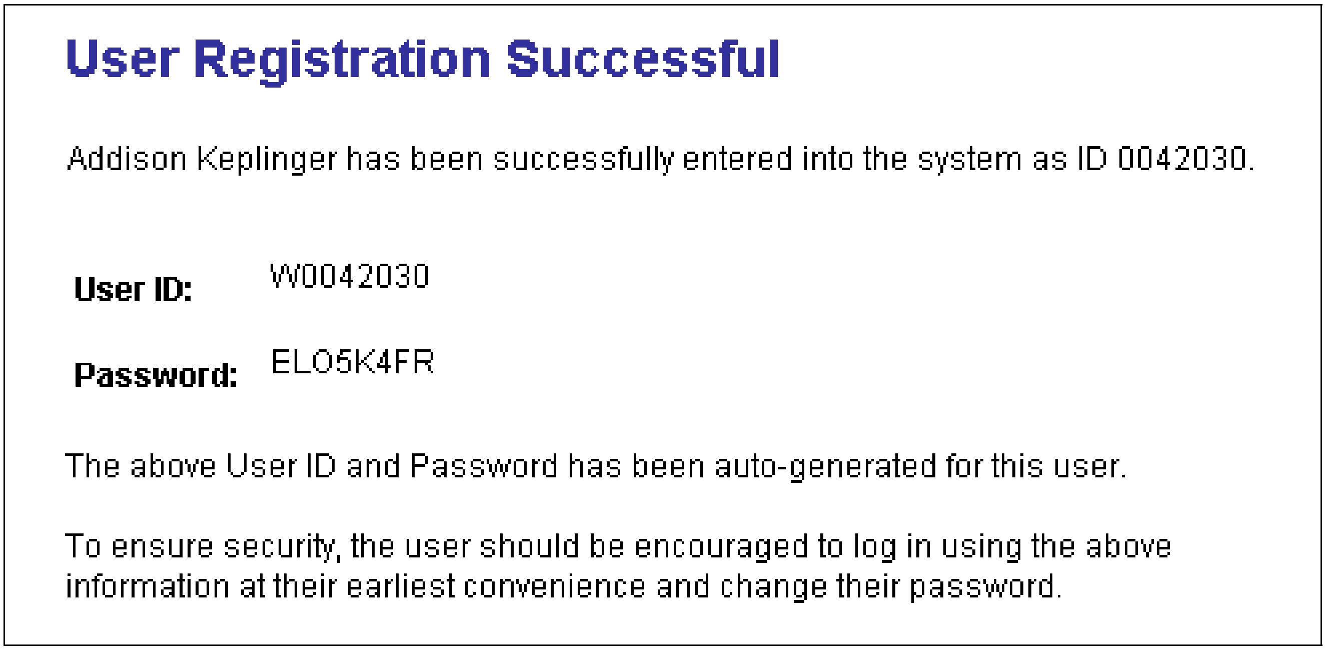


User Registration Successful page

To modify the text on this page, your system administrator must modify the appropriate message in the message catalog.

The new user reviews the data and clicks the Continue to proceed. The system logs the user into your database using the newly created user ID (with the role defined on Installation − Campus Community page and the primary permissions associated with that role) and transfers the new user to the Community Access homepage.

If, based on your search/match criteria, the system finds a potential duplicate, then the system displays the page with a system-issued reference number.



User Registration Successful page

To modify the text on this page, your system administrator must modify the text in the appropriate message in the message catalog.

The new user reviews the data and clicks the Continue to proceed. The system logs the user into your database using the newly created user ID (with the role defined on Installation – Campus Community page and the primary permissions associated with that role) and transfers the new user to the Community Access homepage.

If, based on your search/match criteria, the system finds a potential duplicate, the system displays the page with a system-issued reference number

To modify the text on New User Registration page (for unsuccessful registration) page, your system administrator must modify the text in the appropriate message in the message catalog.

You should include the appropriate contact information for you institution on this page. Your contact information can be the name of a person or department, a telephone number, an email address, or anything your institution wants. Then, when self-service users get this page, they are able to refer to the system-issued reference number and ask for help.

Pages Used to Obtain Access to Self-Service Transactions

Page Name	Object Name	Navigation	Usage
User Registration	VID_DATA_ENTRY	• Click the new user registration link on your institution's internet site. • Administrative users can also select SA Self Service, Community Access, Tasks, New User Registration.	Enter data required to receive a user ID and password and obtain access to the self-service transactions available to the visitor role (or other new user role determined by your institution).
Privacy Policy	PRIVACY_POLICY	Click the View Privacy Policy link on the User Registration page.	View and accept the institution's internet privacy policy.
Create User Profile	VID_ASSIGN_USER	Enter required data and click Save on the User Registration page.	Enter the system-generated user ID and create and associate a unique password.
Registration Successful	VID_CONFIRM_REG	Enter the correct user ID, create a password, and click Submit on the Create User Profile page.	Confirm successful registration and user ID creation.
Registration (for unsuccessful registration)	VID_SEARCH_MESSAGE	Enter data on the Create User Profile page that the system determines is a potential duplicate based on the search/match criteria.	Receive notice of unsuccessful registration when the system detects a duplicate and cannot successfully complete the registration and user ID creation process.

Investigating New User Registration Data

This section discusses how to:

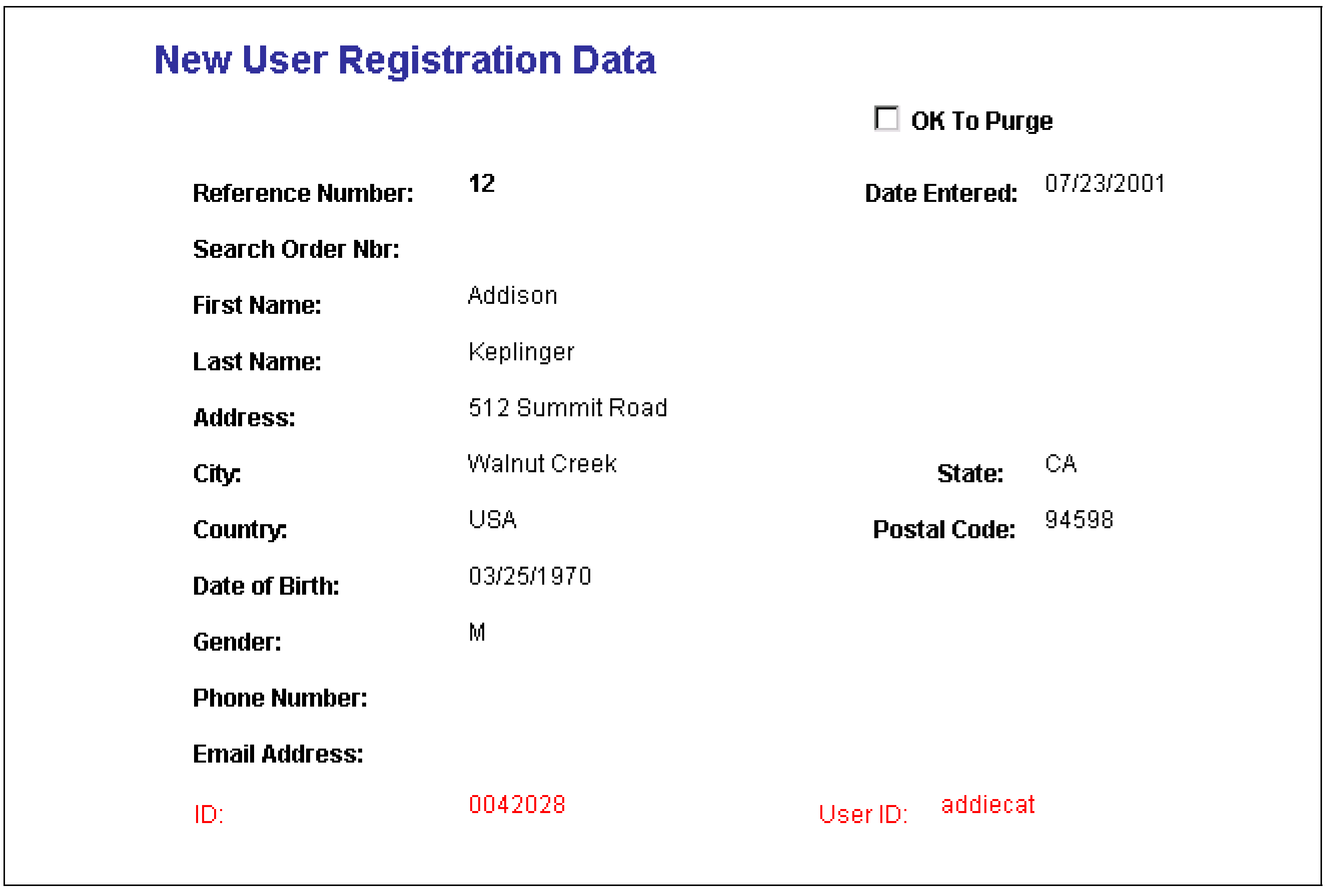
- View data submitted by a guest.
- Purge new user creation records.

Pages Used to Investigate New User Registration Data

Page Name	Object Name	Navigation	Usage
New User Registration Data	VID_HIT	(Administrative users only) SA Self Service, Community Access, Administration, New User Registration	View data submitted by a guest who requested new user registration. Determine the ID and new user ID generated by the system or investigate a duplicate, and make the record available for purging if necessary.
User Registration Successful	VID_ADMIN_USER_REG	(Administrative users only) Click the Create New User button on the New User Registration Data page.	Confirm the successful creation of a new user

Viewing Data Submitted by a Guest

Access the New User Registration Data page.



New User Registration Data page

OK To Purge Select to make the New User Registration record (the record generated in the VID_DATA table) for this registration or registration attempt available for deletion during the Purge New User Creation Table process.

If the record relates to a successfully created user (an ID and user ID appear), deletion of the New User Registration record will not affect the user's data in the PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions data tables—the ID, user ID, and all associated data will remain intact.

Reference Number Indicates the system-issued reference number that appears for the self-service user on the User Registration page (for unsuccessful registration).

The new user registration process reads the Last Visitor ID from the Installation Defaults − Campus Community page, and increases it by one to create the reference number here.

Search Order Number Indicates the search/match level, from the Search/Match Criteria page, by which the system found the potential duplicate.

Date Entered Indicates the date when the self-service new user attempted registration.

ID Indicates the ID generated by the system when it successfully creates the new record in your database for this individual, similar to when an administrative user manually adds a new person to your database.

User ID Indicates the ID generated by the new user registration process when it successfully registers the individual. (This is the user ID that appears for the self-service user on the Registration Successful page.)

Search Click to access Search/Match page where you can manage the search/match process to determine and view the potential duplicate.

Create New User When the match is confirmed as false, click to resubmit the self-service new user's same data and generate a user profile with a user ID and password.

As part of the Create New User function here, the system selects the OK To Purge check box making this unsuccessful registration record available for purging.

When the system successfully creates the new user, it displays the User Registration page to confirm the action and remove the Create New User button to prevent the creation of a duplicate record.

Note. The Create New User function bypasses the search/match process. Use it only when you are able to confirm that the self-service user is a new, unique user, and the potential duplicate is false. Failure to carefully consider this can result in the creation of duplicate data.

Purging New User Creation Records

This section discusses how to purge new user creation records.

Understanding the Purge Process

New User Registration creates rows in the New User Creation table (VID_DATA). When a row relates to a successfully created user (an ID and user ID appear at the bottom of the New User Registration Data page), the Purge New User Creation Table process deletes the record from the New User Creation table only. It does not affect or delete the individual's ID, new user ID, or data in the PeopleSoft Student Administration and PeopleSoft Contributor Relations data tables.

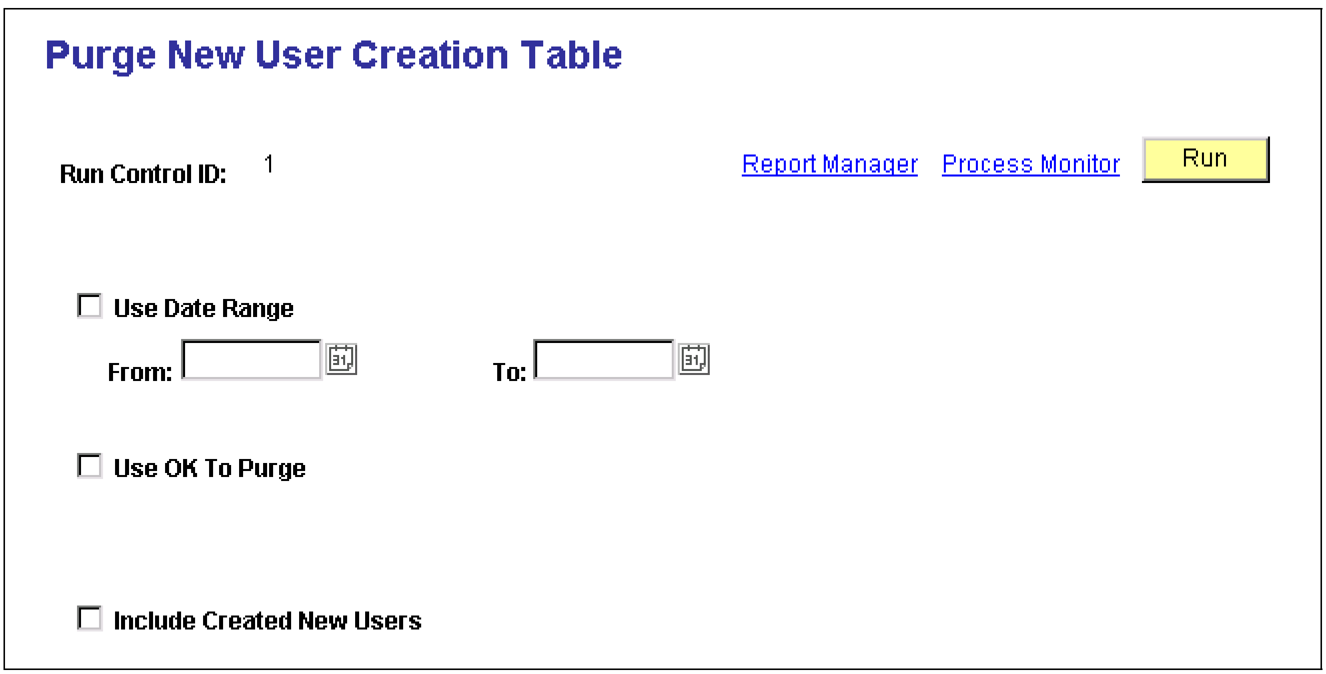
Run the Purge New User Creation Table process periodically to clear the table. You can run the process nightly, weekly, monthly--whatever frequency you deem sufficient to keep pace with your institution's volume of new user registrations.

Page Used to Purge New User Creation Records

Page Name	Object Name	Navigation	Usage
Purge New User Creation Table	RUN_CNTL_VID_PURGE	SA Self Service, Community Access, Process, Purge New User Creation Table	Specify records for the to Purge New User Creation Record process to purge.

Specifying Records to Purge

Access the Purge New User Creation Table page



Purge New User Creation Table page

Select one or multiple options to control the Purge New User Creation Table process.

Use Date Range Select for the process to purge all rows in the specified date range. You must specify the from and to dates for the date range to use.

Use OK To Purge Select for the process to purge rows for which the OK To Purge check box is selected on the New User Registration Data page.

Include Created New Users	Select for the process to purge rows for successfully created new users.
Report Manager	Click to access the Report List page where you can view report content, check the status of a report, and see content detail messages that provide a description of the report and the distribution list.
Process Monitor	Click to access the Process List page where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler Request page where you can specify where a process or job runs and the process output format.

CHAPTER 40

Using PeopleSoft Personal Portfolio Collaborative Application

This chapter provides an overview of PeopleSoft Community Access Collaborative Application and discusses how to:

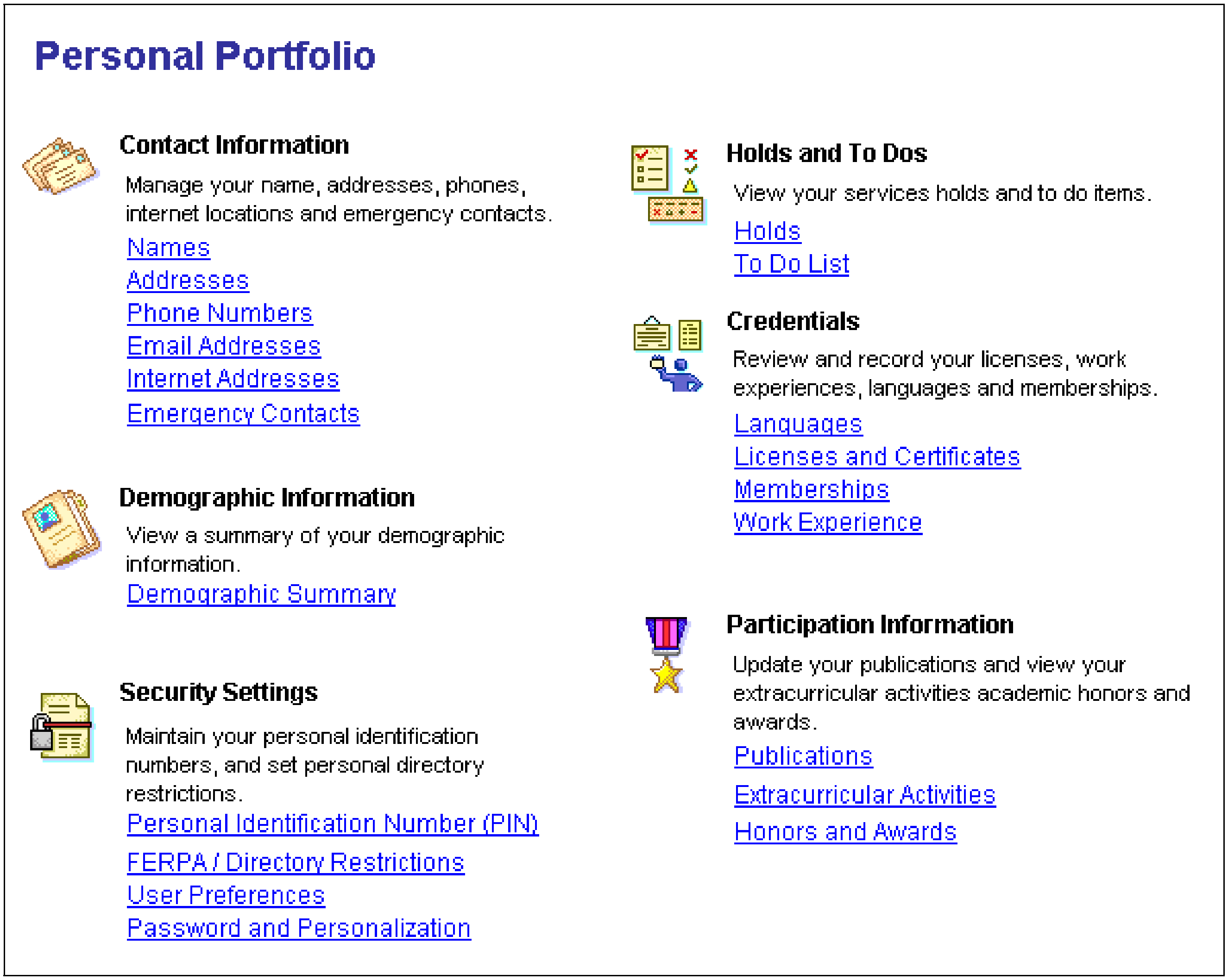
- Set up Personal Portfolio.
- Expose self-service bio/demo data.
- Expose self-service services data.
- Present self-service user preferences.
- Present self-service password and personalization.
- Expose self-service service indicators data.
- Expose self-service checklists data.
- Expose self-service identification data.
- Expose self-service participation data.

Understanding PeopleSoft Personal Portfolio Collaborative Application

The PeopleSoft Personal Portfolio Collaborative Application exposes familiar PeopleSoft Campus Community information to self-service users. Personal Portfolio provides an easy way for self-service users to update basic personal information about themselves at any time without having to visit your offices or complete and mail a hardcopy form.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Personal Portfolio application, you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.



Personal Portfolio home page

All authenticated roles can use the Personal Portfolio Collaborative Application. They can use it to maintain their own bio/demographic information. They can also use it to review the holds and to do items on record at your institution for themselves.

Note. For security reasons, the following data is view-only for Personal Portfolio users: citizenship, visa, veteran status, gender, birth date, ethnicity, extracurricular activities, and internal honors, and awards.

Setting Up Personal Portfolio

Assign levels of control to the types of personal data (names, addresses, phones, and email addresses) that you want to expose to self-services users.

For example, if you want to make phone numbers available to self-service users and permit them to edit or delete the phone numbers, but you do not want them to be able to delete the *Home* phone type, select *Home* for the phone type and *Edit − No Delete* for the control type.

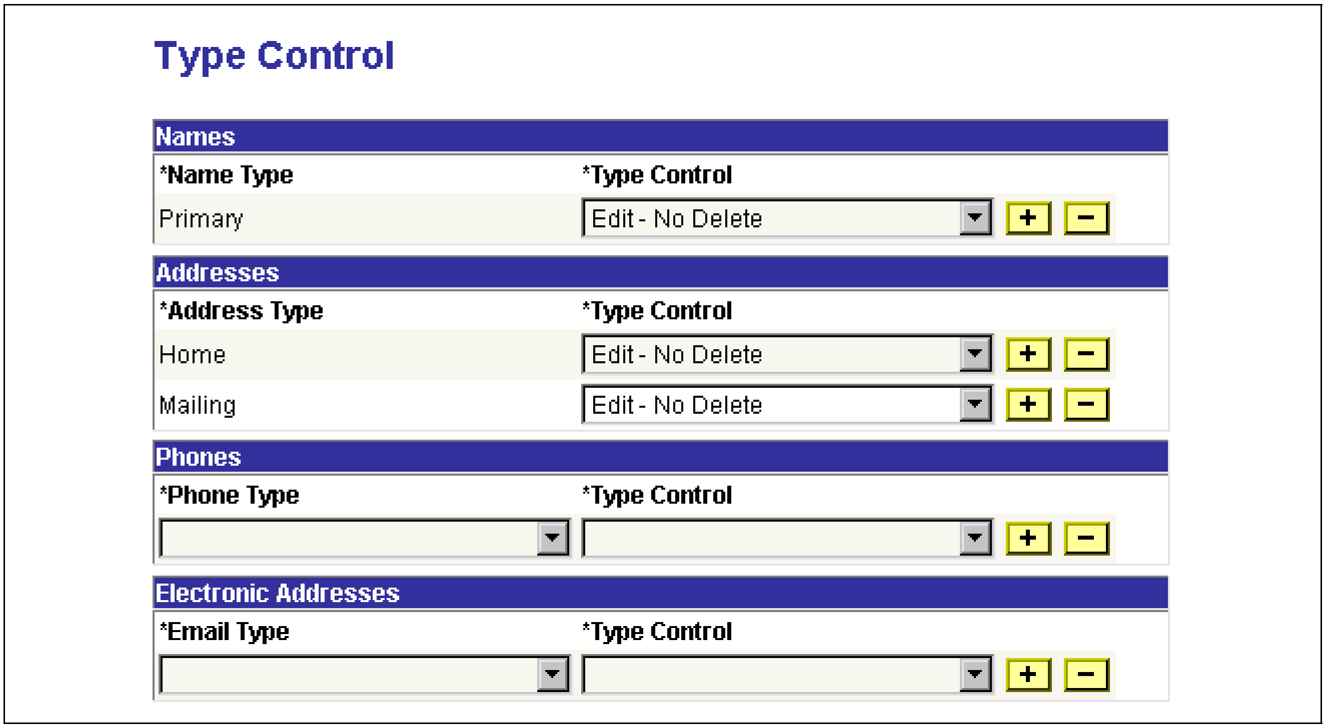
This section discusses how to set type controls.

Page Used to Set Up Personal Portfolio

Page Name	Object Name	Navigation	Usage
Type Control	TYPE_CNTL_SETUP	Design Student Administration, Define Campus Community, Setup, Type Control	Set type controls to identify the types of names, addresses, phones, and email addresses for self-service users to view, edit, or delete.

Setting Type Controls

Access the Type Control page.



Type Control page

Important! The *Primary* name type and *Home* and *Mailing* address types map to PERSONAL_DATA. PeopleSoft delivers these with *Edit − No Delete* type control level set on the Installation SA Options page *(Define Business Rules, Define General Options, Use, Installation Table, SA Options).* You cannot apply the lesser restrictive control of *Full Edit* to them, however you can apply the more restrictive controls of *Display Only* or *Do Not Display.* Self-services users can change data for these address types, but they cannot delete the types. Therefore the Delete (Home) address(es) and Delete (Mailing) address(es) links are never available on the Current Addresses page. If you modify these mapping types on the Installation Table, you must also modify the type control settings on the Type Control page.

Type Control

The level of control for exposing the specified type and its associated data. If no control is selected, the system uses *Full Edit.*

Values for this field are delivered with your system as . Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Display Only: Expose this information to self-service users. Do not permit them to enter or edit the specified type or its associated data.

Do Not Display: Do not expose this information (neither the type nor its associated data) to self-service users.

Edit − No Delete: Expose this information to self-service users. Permit them to edit the data, but do not permit them to delete the type.

Full Edit: Expose this information to self-service users. Permit them to edit and delete the specified type and its associated data. (Default; Least restrictive)

Exposing Self-Service Bio/Demo Data

Self-service Bio/Demographic data is exposed under the Contact Information and Demographic Information sections on the PeopleSoft Personal Portfolio home page. Links in these sections enable self-service users to assume responsibility for maintaining their own name, address, telephone, electronic address, and emergency contact information.

See Also

Chapter 5, "Setting Up Bio/Demographic Data," page 47

Chapter 20, "Maintaining Bio/Demographic Data," page 169

Pages Used to Expose Self-Service Bio/Demo Data

Page Name	Object Name	Navigation	Usage
Current Names	SS_CC_NAME	• Click the Names link on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Names.	View current name types and names data as permitted by the Type Control page.
Change Name	SS_CC_UPDATE_NAME)	Click the Delete (type) name on the Current Names page.	Edit or update a name type and associated name data.
Add Name	SS_CC_UPDATE_NAME	Click the Add a new name link on the Current Names page.	Add a name type and associated data.
Current Addresses	SS_ADDRESSES	• Click the Addresses link on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Addresses.	View current address types and names data permitted by the Type Control page.

Page Name	Object Name	Navigation	Usage
Change Address	SS_UPDATE_ADDRESS	Click the Change (type) address(es) link on the Current Addresses page.	Edit or update an address type and associated data.
Delete Address	SS_UPDATE_ADDRESS	Click the Delete (type) address link on the Current Addresses page.	Delete an address type and associated data.
Add Address	SS_UPDATE_ADDRESS	Click the Add link on the Current Addresses page	Add an address type and associated data.
Future Addresses	SS_FUTURE_ADDRESS	Click the Change Future links on the Current Addresses page.	Review the date and type of a future-dated address and select links to change or delete a future-dated address.
Change or Delete This Address	SS_UPDATE_ADDRESS	Click the Change (type) link on the Future Addresses page	Change or delete a future-dated address.
Phone Numbers	SS_CC_PERS_PHONE	• Click the Phones link on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Phones.	View current phone types and phone numbers as permitted by the Type Control page.
Email Addresses	SS_CC_EMAIL_ADDR	• Click the Email Addresses on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Email Addresses.	View current email address types and email addresses as permitted on the Type Control page
internet Addresses	SS_CC_internet_ADR	• Click the internet Addresses link on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, internet Addresses.	View, add, change, or delete internet addresses, including web site and FTP site addresses.
Emergency Contacts List	SS_CC_EMRG_CNTCT_L	• Click the Emergency Contacts link on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Emergency Contacts.	View, add, change, or delete the name, address, and phone numbers for an emergency contact.

Page Name	Object Name	Navigation	Usage
Emergency Contact Detail	SS_CC_EMRG_CNTCT_D	Click the Add an Emergency Contact link on the Emergency Contacts List page.	Add an emergency contact and enter the contact information.
Change Primary Contact	SS_CC_PRIM_CONTACT	Click the Change Primary Contact link on the Emergency Contacts List page.	Change the primary emergency contact.
Demographic Information	SS_CC_DEMOG_DATA	• Click the Demographic Summary link on the Personal Portfolio home page. • Administrative users can also SA Self Service, Personal Portfolio, Tasks, Demographic Information.	View a summary of demographic data. **Note.** If you load a photo of the individual into the system on the Photograph page described in Maintaining Identification Data, that photo will appear in the upper right on the Demographic Information page.

Exposing Self-Service Services Data

Self-service Services data is exposed in the Security Settings section of the PeopleSoft Personal Portfolio home page. Links in this section enables self-service users to assume responsibility for maintaining their own personal identification numbers and FERPA and other privacy restrictions.

See Also

Chapter 32, “Managing Services Data,” page 401

Chapter 7, “Setting Up FERPA Control,” page 65

Chapter 21, “Managing FERPA,” page 221

Pages Used to Expose Self-Service Services Data

Page Name	Object Name	Navigation	Usage
Personal Identification Number	SS_CC_PIN	• Click the Personal Identification Number link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Personal Identification Number.	Create a personal identification number.
FERPA Restrictions	SS_CC_FERPA	• Click the FERPA Restrictions link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, FERPA/Directory Restriction.	Place restrictions to prevent the release of data.
Release To Publication	INST_PUB_CATG_SEC	Click the Release To Publication link on the Edit FERPA/Directory Restrictions page.	Release restricted information for inclusion in specific internal directory publications.

Presenting Self-Service User Preferences

User Preferences enable self-service users to set default values for use about themselves throughout each PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions collaborative application to which they have access, thus minimizing the need for repetitive data entry. Once set, the default values remain associated with the user until changed or deleted.

Page Used to Present Self-Service User Preferences

Page Name	Object Name	Navigation	Usage
User Preferences	SS_CC_USER_PREF	• Click the User Preference link on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, User Preferences.	Enter default values for academic value and other elements required often by the system.

Presenting Self-Service Password and Personalization

The password and personalization function enables self-service users to change their passwords and create password help clues for themselves. It also enables self-service users to set familiar or preferred default values for many system elements.

When you license and use PeopleSoft Enterprise Portal, the PeopleSoft portal technology provides a set of tools for navigating the portal registry. The Password and Personalization page is part of those tools. It is the navigation menu item labeled *My Profile.*

See Also

PeopleSoft Portal Technology PeopleBook, "Using Portal Navigation Features"

Pages Used to Present Self-Service Password and Personalization

Page Name	Object Name	Navigation	Usage
General Profile Information	USER_SELF_SERVI_SA	• Click the Password and Personalization link on the Personal Portfolio home page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Password and Personalization.	Enter or change personal profile information, including password clue help, default values for many system elements, and specify the email address to which self-service maintenance alerts should be sent. **Note.** You should hide the Change or set up forgotten password help link if you are not using PeopleSoft Enterprise Portal. Information entered here is relevant only when the self-service user accesses your site through the portal and if your system is set to allow passwords to be mailed.
Change Password	USER_CHANGE_PSWD	Click the Change Password link on the General Profile Information page.	Change a password.
Change or Set Up Forgotten Password Help	USER_PSWDHINT	Click the Change or set up forgotten password help link on the General Profile Information page.	Enter a password help clue.
Personalization	USER_SELF_PRSNL	Click the Set Personalizations link on the General Profile Information page.	Set default values for date format, local time zone, number of pages to hold in cache, and so on.
Personalization Explanation	PSUSEROPTNEXPLN	Click the Explain link on the Personalization page.	View an explanation of the option listed on the Personalization page.

Exposing Self-Service Service Indicators Data

Self-service Service Indicators data is exposed under the Holds and To Do's section of the PeopleSoft Personal Portfolio home page. The Holds link in this section enables self-service users to assume responsibility for viewing and resolving their own negative service indicator issues.

See Also

Chapter 6, "Setting Up Service Indicators," page 57

Chapter 22, "Managing Service Indicators," page 231

Pages Used to Expose Self-Service Service Indicators Data

Page Name	Object Name	Navigation	Usage
Holds Summary	SS_CC_HOLDS	• Click the Holds link on the Personal Portfolio page. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Holds.	View holds placed on services and determine how and by when to resolve them.
Hold Item	SS_CC_HOLD_SEC	Click the Hold Item link on the Holds Summary page.	View information about a specific hold and determine how to resolve it and whom to contact

Exposing Self-Service Checklists Data

Self-service Service Checklists data is exposed under the Holds and To Do's section of the PeopleSoft Personal Portfolio home page. The To Do's link in this section enables self-service users to assume responsibility for viewing and resolving their own pending checklist items.

See Also

Chapter 15, "Setting Up Checklists," page 129

Chapter 28, "Managing Checklists," page 323

Pages Used to Expose Self-Service Checklists Data

Page Name	Object Name	Navigation	Usage
To Do List Summary	SS_CC_TODOS	• Click the To Do's link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, To Do List.	View pending checklist items and determine what to do to satisfy the requirements.
To Do Item	SS_CC_TODOS_SEC	Click the link under the To Do Item heading on the To Do List Summary page.	View information about a specific checklist item and determine what is required and whom to contact.

Exposing Self-Service Identification Data

Self-service Identification data is exposed under the Credential section of the PeopleSoft Personal Portfolio home page. Links in this section enable self-service users to assume responsibility for viewing and maintaining their own languages, license and certificates, memberships, and work experience data.

See Also

Chapter 8, "Setting Up Identification Data," page 73

Chapter 29, "Managing Identification Data," page 355

Pages Used to Expose Self-Service Identification Data

Page Name	Object Name	Navigation	Usage
Languages Summary	SS_CC_LANGUAGES_L	• Click the Languages link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Languages.	View a summary of language proficiency.
Language Detail	SS_CC_LANGUAGES_D	Click the Add a Language button or the Edit button on the Languages Summary page.	Add languages identify levels of proficiency in them.
Delete Confirmation	EO_DEL_CONFIRM	Click the Delete button on the relevant summary page: • Language/Summary page • License/Certificate Summary page • Membership Summary page • Work Experience Summary page • Publications Summary page	Confirm that a selected item is the item to delete.
License and Certificates Summary	SS_CC_LIC_CERT_L	• Click the Licenses and Certificates link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Languages and Certificates.	View a summary of licenses and certificates.

Page Name	Object Name	Navigation	Usage
License/Certificate Detail	SS_CC_LIC_CERT_D	Click the Add a License/Certificate button or the Edit button on the Licenses and Certificates Summary page.	Enter or modify license and certificate data
Membership Summary	SS_CC_MEMBER_L	• Click the Memberships link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Memberships.	View a summary of membership data.
Membership Detail	SS_CC_MEMBER_D	Click the Add a Membership button or the Edit button on the Memberships Summary page.	Enter or modify membership data
Work Experience Summary	SS_CC_WORK_EXP_A	• Click the Work Experience link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Work Experience.	View a summary of work experience.
Employment Details	SS_CC_WORK_EXP	Click the Add a work experience button or the Edit button on the Work Experience Summary page.	Enter or modify work experience data.

Exposing Self-Service Participation Data

Self-service Participation data is exposed under the Participation section of the PeopleSoft Personal Portfolio home page. You can allow self-service users to be responsible for viewing and maintaining their own publications, extracurricular activities, and honors and awards data by providing those links here.

See Also

Chapter 30, “Managing Participation Data,” page 373

Pages Used to Expose Self-Service Participation Data

Page Name	Object Name	Navigation	Usage
Publications Summary	SS_CC_PUB_L	• Click the Publication link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Publications.	View a summary of one's publications.
Publication Detail	SS_CC_PUB_D	Click the Add Publication button or the Edit button on the Publications Summary page.	Enter or modify publications data.
Extracurricular Activities	SS_CC_EXTRACUR_ACT	• Click the Extracurricular Activities link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Extracurricular Activities.	View a summary of extracurricular activities.
Academic Honors and Awards	SS_CC_HONOR_AWARD	• Click the Honors and Awards link on the Personal Portfolio homepage. • Administrative users can also select SA Self Service, Personal Portfolio, Tasks, Honors and Awards.	View a summary of honors and awards.

CHAPTER 41

Using PeopleSoft Community Directory Collaborative Application

This chapter provides an overview of PeopleSoft Community Directory Collaborative Application and discusses how to:

- Set up community directory.
- View the directories.

Understanding PeopleSoft Community Directory Collaborative Application

The Community Directory Collaborative Application enables you to provide searchable directories of members of your campus community online over the internet. You can make the directories available through a link on your web site, a menu item in your administrative system, a pagelet in PeopleSoft Campus Portal—wherever you want.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. To use the self-service pages described here, you need to license the PeopleSoft Community Directory Collaborative Application.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

Run the Community Directory Load process to use roles to segregate IDs and their related releasable data and generate an online student directory, an alumni directory, or an employee directory. Then, instead of exposing an entire list of people at your institution and having users load and search through it, you can make the directories available so users can control the search to review smaller online lists and quickly locate individuals at your institution.

If a student places FERPA privacy restriction on a specific type of data for herself, the system will not expose that data in the online directory. Or, if the individual placed the restriction but chose to release it for inclusion in a specific publication, for example, the Student Directory, then even though the data is not releasable elsewhere, the system displays it in the specified directory as desired.

To set up PeopleSoft Community Directory Collaborative Applications, you run the Community Directory Load process to generate a student, employee, or alumni directory. You specify the appropriate mass change definition for the directory to generate, and specify the type of data to include in that directory.

Then, you create a link, pointing to the Community Directory page. This link could be a menu item on your intranet site, a pagelet link on PeopleSoft Campus Portal, or a link any other place where you want to give users access to these directories. When users click the link, the Community Directory page appears and users can select from the directories that you make available to them from there.

Setting Up Community Directory

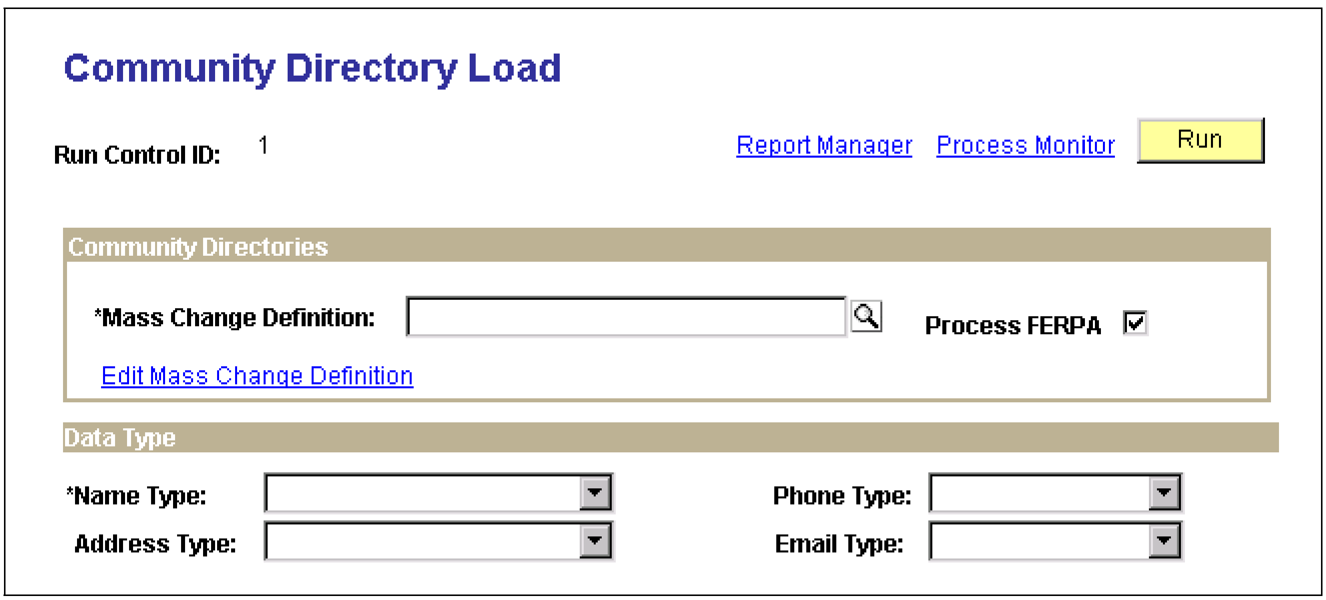
This section discusses how to generate online directories.

Page Used to Set Up Community Directory

Page Name	Object Name	Navigation	Usage
Community Directory Load	CAMPDIR_RUNCNTL	SA Self Service, Community Directory, Process, Community Directory Load	Generate online directories.

Generating Online Directories

Access the Community Directory Load page.



Community Directory Load page

Community Directories

Mass Change Definition Specify the mass change definition for the directory to generate.

CampDir Alumni: Generates the Alumni Directory.

CampDir Staff: Generates the Employee Directory

CampDir Student: Generates the Student Directory

Process FERPA Select to indicate that the system should apply the FERPA restrictions and release to publications options selected on the FERPA page, FERPA Quick Entry page, or the self-service FERPA Restrictions page in PeopleSoft Personal Portfolio Collaborative Application.

Edit Mass Change Definition Click to access the Mass Change Definition search page where you can select the mass change definition to edit.

Data Type

Select one or any combination of data types to include in the directory.

Name Type Select the type of name to include for individuals in this directory.

Address Type Select the type of address to include for individuals in this directory.

Phone Type Select the type of phone data to include for individuals in this directory.

Email Type Select the type of email address to include for individuals in this directory.

Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler Request page, where you can specify where a process or job runs and specify the process output format.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Using PeopleSoft Process Scheduler”

Searching Community Directories

This section discusses how to:

- Specify the community directory to search.
- Search the students community directory.
- Search the employees community directory.
- Search the alumni community directory.

Pages Used to Search the Directories

Page Name	Object Name	Navigation	Usage
Community Directory	SRCH_CD_TYPE	SA Self Service, Community Directory, Tasks, Community Directory Search Self-service users click the link your institution places on your internet site.	Specify the community directory and criteria to search.
Community Directory for Students	SRCH_STDNT_CRIT	Specify the Student Directory on the Community Directory page and click Search.	Search the students community directory for directory information about a student in your system.
Community Directory for Employees	SRCH_STAFF_CRIT	Specify the Employees Directory on the Community Directory page and click Search.	Search the employees community directory for directory information about an employee in your system.
Community Directory for Alumni	SRCH_ALUMN_CRIT	Specify the Alumni Directory on the Community Directory page and click Search.	Search the alumni community directory for directory information about an employee in your system

Specifying the Community Directory to Search

Access the Community Directory page.

Community Directory page

Directory Type Select the directory type *(Alumni Directory, Staff Directory,* or *Student Directory)* to search.

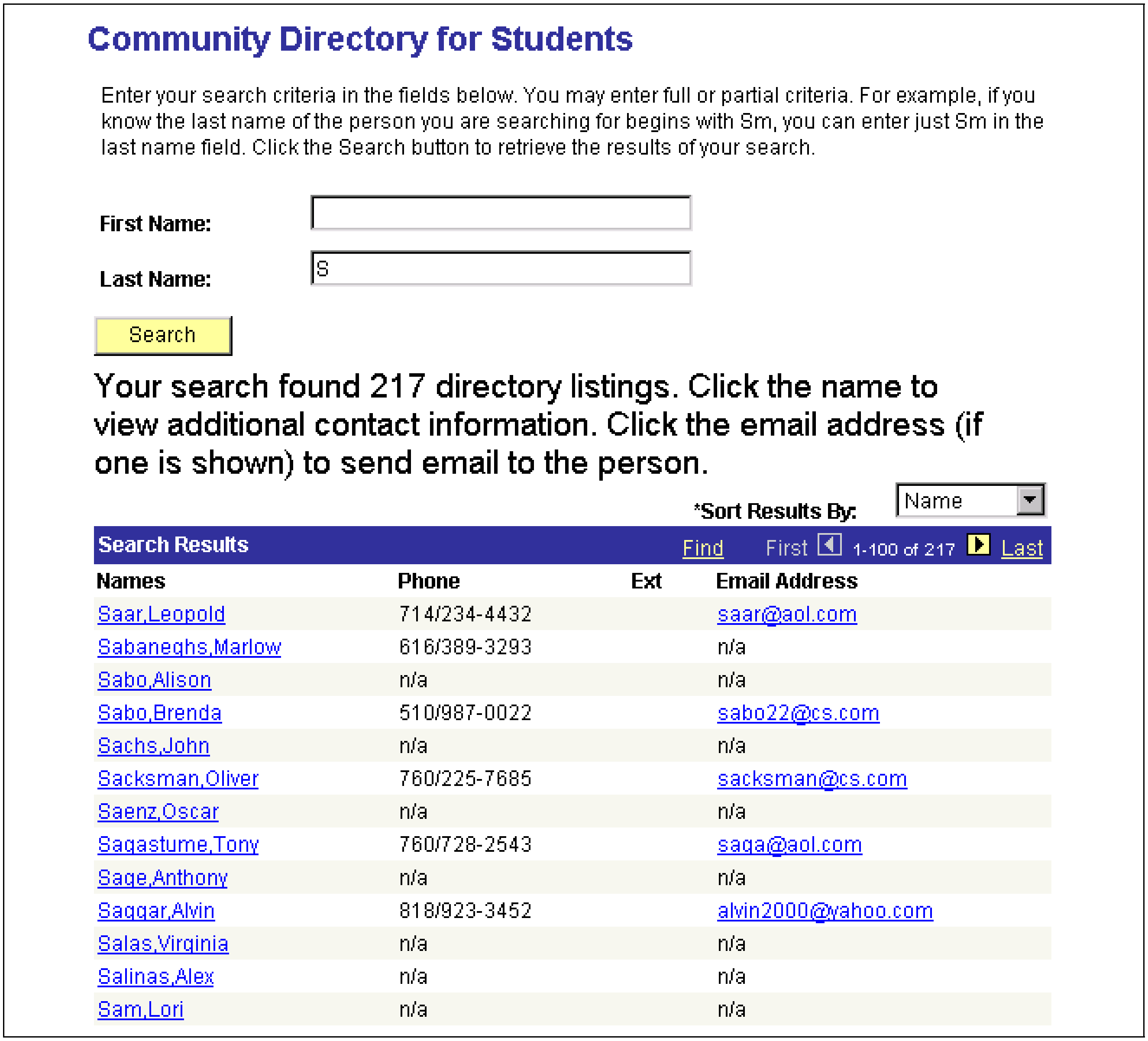
Search By Specify the criteria *(First Name, Full Name (Last,First),* or *Last Name)* by which to search.

Specify one or more characters to use. For example, if you select *First Name* and enter only *S,* the system searches through the specified directory for all first names that begin with “S.”

Search Click to access the specified directory.

Searching the Students Community Directory

Access the Community Directory for Students page.



Community Directory for Students

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with Sm, you can enter just Sm in the last name field. Click the Search button to retrieve the results of your search.

First Name:

Last Name: S

Search

Your search found 217 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

***Sort Results By:** Name

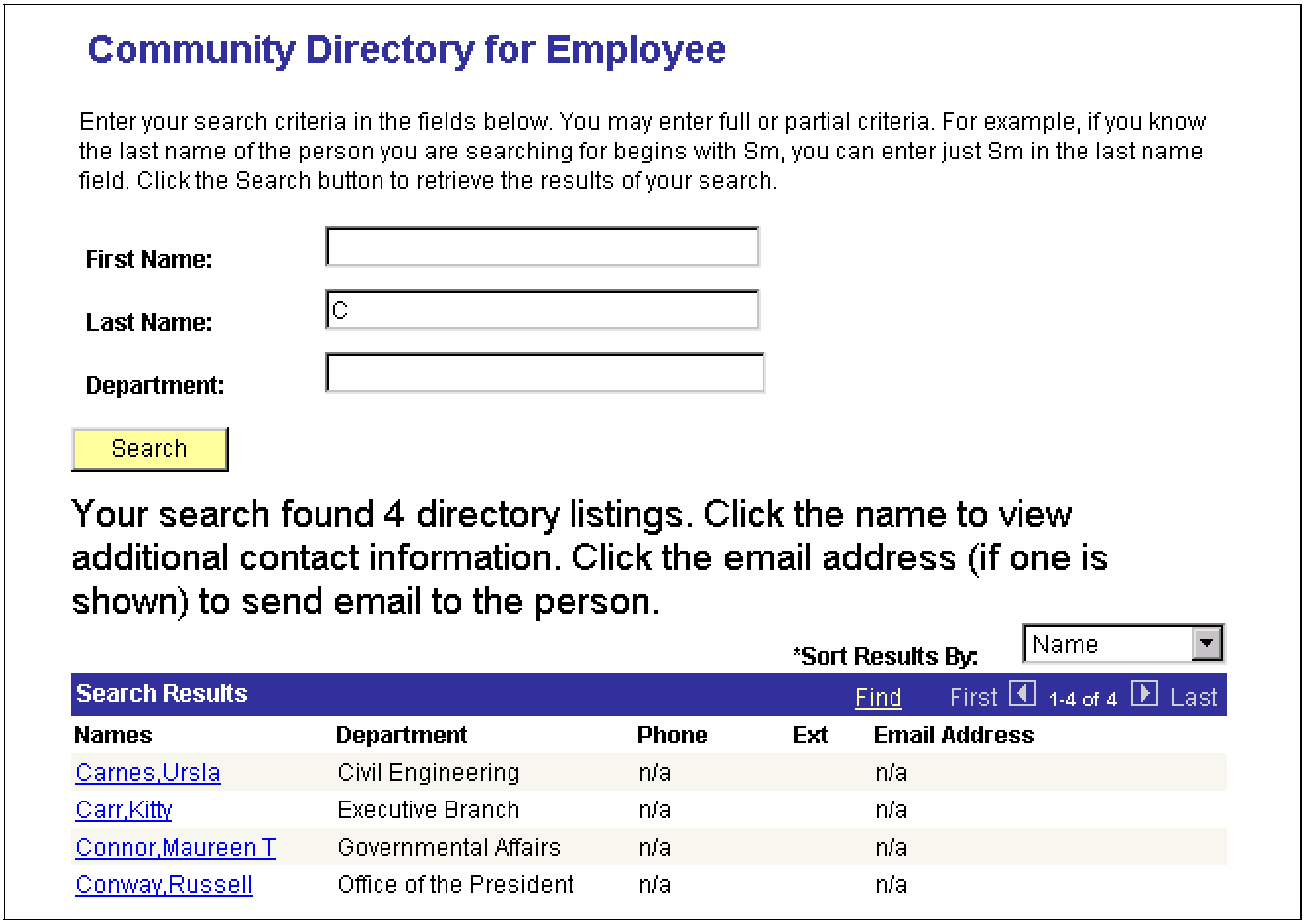
Search Results Find First 1-100 of 217 Last

Names	Phone	Ext	Email Address
Saar,Leopold	714/234-4432		saar@aol.com
Sabaneghs,Marlow	616/389-3293		n/a
Sabo,Alison	n/a		n/a
Sabo,Brenda	510/987-0022		sabo22@cs.com
Sachs,John	n/a		n/a
Sacksman,Oliver	760/225-7685		sacksman@cs.com
Saenz,Oscar	n/a		n/a
Sagastume,Tony	760/728-2543		saga@aol.com
Sage,Anthony	n/a		n/a
Saggar,Alvin	818/923-3452		alvin2000@yahoo.com
Salas,Virginia	n/a		n/a
Salinas,Alex	n/a		n/a
Sam,Lori	n/a		n/a

Community Directory for Students page

Searching the Employees Community Directory

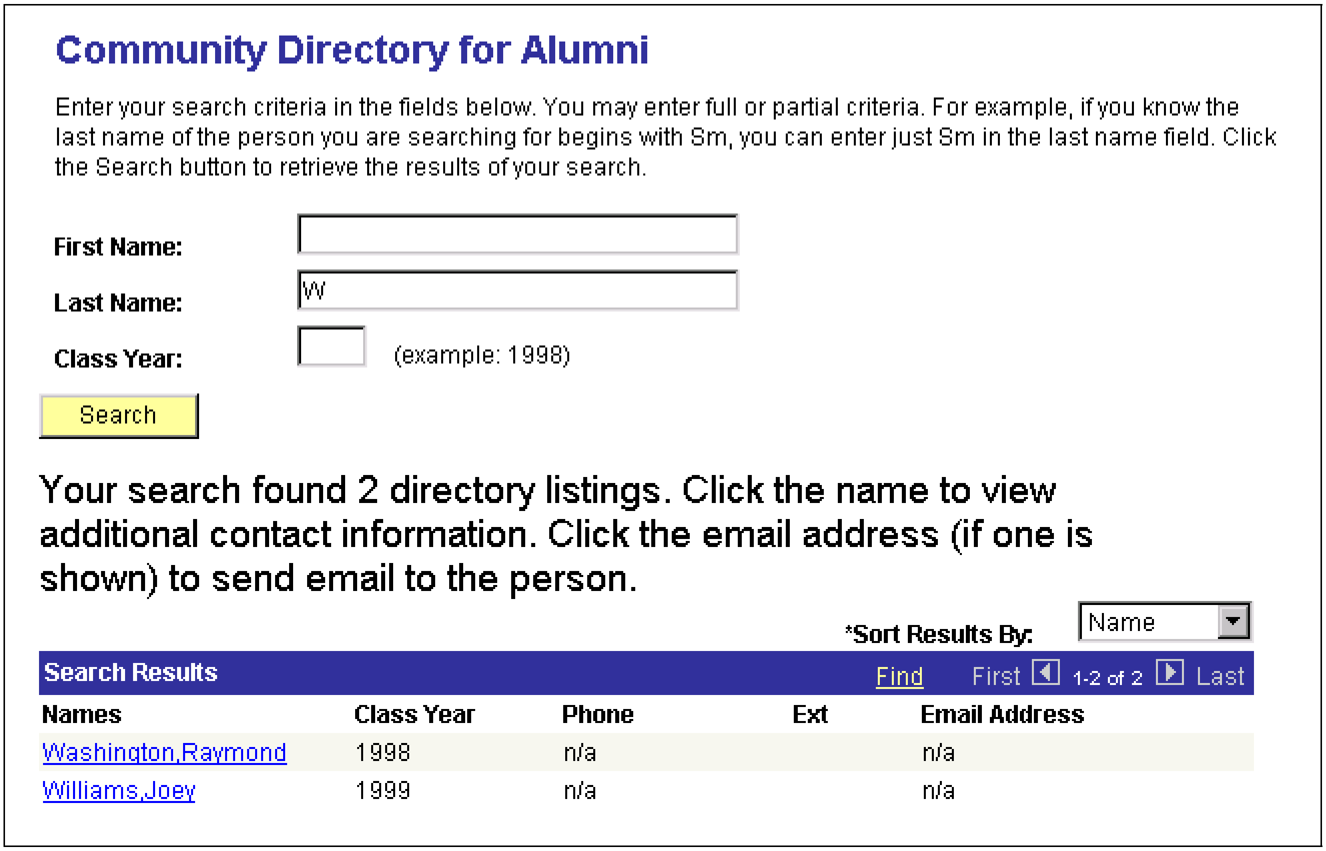
Access the Community Directory for Employee page.



Community Directory for Employee page

Searching the Alumni Community Directory

Access the Community Directory for Alumni page.



Community Directory for Alumni page

APPENDIX A

PeopleSoft Campus Community Reports

This appendix provides an overview of PeopleSoft Campus Community reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleTools PeopleBook: Process Scheduler

PeopleSoft Campus Community Reports A to Z

This table lists the PeopleSoft Campus Community reports, sorted alphbetically by report ID. All but three of the reports are Crystal reports run by PeopleSoft Process Scheduler.

Report ID and Report Name	Description	Navigation	Run Control Page
AD722 Checklist Table	Lists all checklists in your system. The information includes the institutions, checklist codes, effective dates, administrative functions, checklist types, tracking groups, due dates and due days. This report references fields as defined on the Checklist Table page. (Crystal)	Build Community, Checklists, Report, Checklist Table	PRSCSRUNCNTL
AD723 Tracking Group Table	Lists all the tracking groups in your system. The information includes institutions, tracking group code, effective dates, and administrative functions. This report references fields as defined on the Tracking Groups page. (Crystal)	Build Community, Checklists, Report, Tracking Group Table	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
CC701 Communication Category Table	Lists all the communication categories in your system. The information includes the categories, effective dates, and associated communication contexts. The report references fields defined on the Communication Categories page. (Crystal)	Build Community, Communications, Report, Communication Category Table	PRSCSRUNCNTL
CC702 Standard Letter Table	Lists all the letter codes in your system. The information includes the letter codes, letter descriptions, administrative functions, and unique SQC, if any. The report references fields defined on the Standard Letters page. (Crystal)	Build Community, Communications, Report, Standard Letter Table	PRSCSRUNCNTL
CC703 SpeedKey Table	Lists all the communication speed keys in your system. The information includes the institution, administrative function, communication key, communication category, context, duration, method, direction, letter code, whether to print comments, activity completed status and unsuccessful status. The report references fields defined on the Communication Speed Keys page. (Crystal)	Build Community, Communications, Report, Communication Key Table	PRSCSRUNCNTL
CC704 Athletic Participation Table	Lists all the athletic participation codes in your database. The information includes the effective dates, descriptions, and yes or no status for NCAA eligibility and current participant. The report references fields defined on the Athletic Participation Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Athletic Participation Table	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
CC706 Ethnicity Table	Lists all the ethnicity codes in your system. The information includes which of the five U.S. federally mandated ethnic groups with which each code is associated. The report references fields defined on the Ethnicity Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Ethnicity Table	PRSCSRUNCNTL
CC707 Health Test Table	Lists all the health tests in your database. The information includes the effective dates and descriptions. The report references fields defined on the Health Test Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Health Test Table	PRSCSRUNCNTL
CC708 Immunization Table	Lists all the immunization tests in your database. The information includes the effective dates and descriptions. The report references fields defined on the Immunization Test Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Immunization Test Table	PRSCSRUNCNTL
CC709 Residency Exception Table	Lists all the residency exception codes in your database. The information includes effective dates and descriptions. The report references fields defined on the Residency Exception Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Residency Exception Table	PRSCSRUNCNTL
CC710 Residency Table	This report lists all the residency codes in your database. The information includes effective dates and descriptions. The report references fields defined on the Residency Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Residency Table	PRSCSRUNCNTL
CC711 Standard Industry Table	Lists all the U.S. Standard Industry codes (SICs) in your system. The information includes the effective dates and descriptions. The report references fields defined on the Standard Industry Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Standard Industry Table	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
CC713 Address Usage Table	Lists all of the address usage codes in your system. (Crystal)	Design Student Administration, Establish People Processing, Report, Address Usage Table	PRSCSRUNCNTL
CC714 FERPA Control	Lists all the FERPA view records and fields in your database. The report references fields defined on the FERPA Control page. (Crystal)	Design Student Administration, Establish People Processing, Report, FERPA Control	PRSCSRUNCNTL
CC715 Location Address Table	Lists all of the location addresses in your system. (Crystal)	Design Student Administration, Establish People Processing, Report, Location Address Table	PRSCSRUNCNTL
CC717 Name Prefix Table	Lists all of the name prefixes in your system. (Crystal)	Design Student Administration, Establish People Processing, Report, Name Prefix Table	PRSCSRUNCNTL
CC718 Name Suffix Table	Lists all of the name suffixes in your system. (Crystal)	Design Student Administration, Establish People Processing, Report, Name Suffix Table	PRSCSRUNCNTL
CC719 Name Usage Table	Lists all of the name usage codes in your system. (Crystal)	Design Student Administration, Establish People Processing, Report, Name Usage Table	PRSCSRUNCNTL
CC721 Salutation Table	Lists all of the salutations in your system. (Crystal)	Design Student Administration, Establish People Processing, Report, Salutation Table	PRSCSRUNCNTL
CC722 Search Table	Lists all the search/match criteria search orders in your database. The information includes the field designated as search criteria for each search order number. The report references fields defined on the Search/Match Criteria and Search/Match pages. (Crystal)	Design Student Administration, Establish People Processing, Report, Search/Match Criteria	PRSCSRUNCNTL
CC723 Event Type Table	Lists all the event types in your system, including the campus event type, effective date, and comments. This report references fields defined on the Event Type Table page. (Crystal)	Build Community, Events, Report, Event Type Table	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
CC724 Resource Code Table	Lists all the resources in your system, including the resource codes, effective dates, and descriptions. This report references fields defined on the Resource Code Table page. (Crystal)	Build Community, Events, Report, Resource Code Table	PRSCSRUNCNTL
CC725 Staff Code Table	Lists all the staff codes in your system, including the staff codes, effective dates, and descriptions. This report references fields defined on the Staff Code Table page. (Crystal)	Build Community, Events, Report, Staff Code Table	PRSCSRUNCNTL
CC726 Comment Category Table	Lists all the comment categories in your system. The information includes the institution, comment category, effective date, and administrative function. The report references fields defined on the Comment Categories page. (Crystal)	Build Community, Comments, Report, Comment Category Table	PRSCSRUNCNTL
CC727 Diagnosis Table	Lists all the diagnosis codes in your database. The information includes the effective dates and descriptions. The report references fields defined on the Diagnosis Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Diagnosis Table	PRSCSRUNCNTL
CC728 Language Table	Lists all the language codes in your system. The information includes the effective dates and descriptions. The report references fields defined on the Language Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Language Table	PRSCSRUNCNTL
CC729 Legacy Table	Lists all the legacy institution affiliation codes in your system. The information includes the effective dates, descriptions, and yes or no status for including institution information. The report references fields defined on the Legacy Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Legacy Table	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
CC730 License/Certificates Table	Lists all the licenses and certificate codes in your database. The information includes the descriptions, and yes or no status for whether renewal is required, the length of the renewal period in years, months, weeks, or days. The report references fields defined on the License/Certification Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, License/Certificate Table	PRSCSRUNCNTL
CC731 Relationship Table	Lists all the relationship types in your system. The information includes the primary relationship's sex (gender), reciprocal relationship, and reciprocal relationship's sex (gender). The report references fields defined on the Relationship Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Relationship Table	PRSCSRUNCNTL
CC732 Religious Preference Table	Lists all the religious preference codes in your system. The information includes the effective dates and descriptions. The report references fields defined on the Religious Preference Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Religious Preference Table	PRSCSRUNCNTL
CC733 Standard Occupation Table	Lists all the U.S. Standard Occupation codes (SOCs) in your system. The information includes the effective dates and descriptions. The report references fields defined on the Standard Occupation Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Standard Occupation Table	PRSCSRUNCNTL
CC734 Visa Permit Table	Lists all the visa and permit types in your database. The information includes country, classification, permit type, effective date, status, permit class, description, and any comments entered for the visa or permit type. The report references fields defined on the Visa/Permit Table page. (Crystal)	Design Student Administration, Define Campus Community, Report, Visa Permit Table	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
CC737 Name Parse Table	Lists all the name parse rules in your system, including the name type/part begin and end positions and their long and short descriptions. You use name parse rules to specify various name parts. (Crystal)	Design Student Administration, Establish People Processing, Report, Name Parse Table	PRSCSRUNCNTL
PER020 Employee Home Address Listing	Lists all the home addresses in your system. The information includes the individual's name, address, and phone number. The report references fields defined on the Bio/Demo Data page, the Addresses page, and the Phones page. (SQR)	Build Community, Bio/Demographic Data, Report, Address Listing	PRSCSRUNCNTL
PER032 Passport/Visa Expiration	Lists all the individuals in your database who have passports, visas, or work permits. Passport information includes country, passport number, and issue and expiration dates. Visa and work permit information includes country, visa or work permit number, type of permit, and issue and expiration dates. The report references fields defined on the Citizenship/Passport pages and Visa/Permit pages. (SQR)	Build Community, Identification Data, Report, Passport Visa Expiration	PRSCSRUNCNTL
PER033 Citizenship/Country/Visa Audit	Lists information about citizenship and visa status, sorted in categories according to native or naturalized citizenship status and local or non-local visa. The report references fields defined on the Citizenship/Passport pages and Visa/Permit pages in the Identification component. (SQR)	Build Community, Identification Data, Report, Citizenship Cntry Visa Audit	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER701 Department Table	Lists all the department codes in your database. The information includes the department IDs, effective dates, names, location codes, and manager IDs. The report references fields defined on the Organization Departments and Organization Department Locations pages. (Crystal)	Define Business Rules, Manage Human Resources, Report, Department Table	PRSCSRUNCNTL
PER705 Location Table	Lists all the codes in your database for the physical locations within your institution. The information includes the effective dates, descriptions, the building name, and the physical street address with country code. The report references fields defined on the Organization Locations page. (Crystal)	Define Business Rules, Manage Human Resources, Report, Location Table	PRSCSRUNCNTL
PER708 Country Table	Lists all the countries in your database. The information includes the three-letter country code, country name and abbreviation, and the two-character country code. The report references fields defined on the Country Table page. (Crystal)	Define Business Rules, Define General Options, Report, Country Table	PRSCSRUNCNTL
SR707A Committee Role Table	Lists all the committee types in your system. The information includes the institution, committee type, effective date, people prompt record, and committee role. The report references fields defined on the Committee Type/Role page. (Crystal)	Build Community, Committees, Report, Committee Role	PRSCSRUNCNTL
SR708A Committee Member	Lists all the committee members in each committee in your system. The information includes the institution, committee ID, committee type, committee member type and ID, committee role, and the start and end dates of the member's scheduled participation. The report references fields defined on the Committee Members page. (Crystal)	Build Community, Committees, Report, Committee Member	PRSCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR721 Honor Award Table	Lists awards codes and indicates if internal or external. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Honor Award Table	PRSCSRUNCNTL
SR737 Company Site Location Table	Lists all the location codes for the physical locations of external organizations. The information includes the effective dates, descriptions, the office type and the physical street address with country code. The report references fields defined on the Organization Locations page. (Crystal)	Define Student Administration, Report G-Z, Location Tbl	PRSCSRUNCNTL

Glossary of PeopleSoft Terms

absence entitlement — This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take — This element defines the conditions that must be met before a payee is entitled to take paid time off.

account — You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

accounting class — In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date — The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting entry — A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

accounting split — The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator — You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason — The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to anotherand a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

allocation rule — In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit — The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey — One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

child — In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.

Class ChartField — A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clone — In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

collection — To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

compensation object — In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure — In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

configuration parameter catalog — Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan — In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference — Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context — In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

corporate account — Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.

cost profile — A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row — A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If youre working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See *activity.*
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addressesfor a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary locationindicated by a *1*is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node — A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

participant — In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object — Each participant object may be related to one or more compensation objects.

See also *participant object.*

payout — In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.

PeopleCode — PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event — An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture — The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.

performance measurement — In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context — In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

per seat cost — In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.

plan — In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context — In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan contextif three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan section — In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.

plan template — In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

portal registry — In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

private view A user-defined view that is available only to the user who created it.

process See *Batch Processes.*

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record definition A logical grouping of data elements.

record field A field within a record definition.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

results management process
In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

routing
Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context
In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query
You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section
In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event
In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

self-service application
Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

session
In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template
In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

Learning Management activitycharacteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

sibling A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

SQR See *Structured Query Report (SQR)*.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

Structured Query Report (SQR) A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

table The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).

TableSet sharing Specifies control table data for each business unit so that redundancy is eliminated.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction loading process In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.

transaction type In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

uniform resource locator (URL) In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL — See *uniform resource locator (URL).*

user interaction object — In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable — In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse — A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet — A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow — The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist — The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT — Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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