PeopleSoft®

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook

August 2002

PeopleSoft 8 SP1
Recruiting and Admissions PeopleBook
SKU SA8SP1SAD-B 0802

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Printed in the United States.

Contents

Chapter 11

Chapter 12

Chapter 13

Chapter 14

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 Recruiting and Admissions Preface

This preface discusses PeopleSoft application fundamentals.

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 product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Recruiting and Admissions PeopleBook* provides implementation and processing information for your PeopleSoft Recruiting and Admissions system. 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 product line 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 and Contributor Relations Solutions product lines. Whether you are implementing only PeopleSoft Recruiting and Admissions, some combination of applications within the product line, or the entire PeopleSoft Student Administration Solutions and PeopleSoft 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.

In addition to the *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, you should review the *PeopleSoft Campus Community Fundamentals PeopleBook*. This 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.

Note. One or more pages in PeopleSoft Recruiting and Admissions operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook.*

See Also

PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook, “PeopleSoft Contributor Relations Preface”

CHAPTER 1

Getting Started With PeopleSoft Recruiting and Admissions

This introductory chapter provides important information that you should review before using this PeopleBook.

PeopleSoft Student Administration Solutions Fundamental PeopleBooks

Two PeopleBooks are building blocks for PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions documentation.

- *PeopleSoft Student Administration Solutions Fundamentals PeopleBook*
- *PeopleSoft Campus Community Fundamentals PeopleBook*

PeopleSoft Student Administration Solutions Fundamentals PeopleBook contains important information about your implementation including legacy data management, installation settings, and application dependencies. This book also includes essential information about setting up your organizational structure and calendars. Chapters cover many general topics such as tableset sharing, system and application security, and Collaborative Applications.

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

PeopleSoft Recruiting and Admissions

This PeopleBook reviews the concepts behind PeopleSoft Recruiting and Admissions Business Processes and presents procedures for designing and using this part of your Student Administration system.

The following topics provide an overview of this PeopleBook:

- Building Your Recruiting Structure discusses how to define recruiters in your database and the type of information you can record for them.
- Recruiting Prospective Students discusses how to create a database of prospective students in PeopleSoft Student Administration Solutions, as well as how to capture data regarding these prospective students.

- Tracking Supporting Prospect and Applicant Information discusses how to enter and maintain supporting prospect and applicant information.
- Adding and Updating Applications discusses how to add and update applications manually, using the Quick Admit feature, and in a limited fashion through external test data loads.
- Receiving EDI Applications and Transcripts discusses how to load external academic transcripts and applications through EDI.
- Processing External Test Score Data discusses the steps to be followed to set up, process and post ACT, ADA, AMCAS, AP, CRS, DAT, EOS, GMASS, GMAT, GRE, LSAT, LSDAS, SAT, SAT II, SSS, and TOEFL external test data.
- Receiving External Applications from OUAC discusses how to load, post, and maintain OUAC external data.
- Evaluating Applicants discusses how to evaluate applicants and applications.
- Calculating Admissions Averages discusses how to evaluate that applicant by the grade point average he or she earned in a specific set of classes.
- Creating Alternate Program Offers discusses how to evaluate applicants in alternate programs when they do not meet the requirements for their requested program.
- Updating Application Program Actions and Statuses discusses the program actions and program statuses delivered with your system and how to update them.
- Managing Enrollment describes how your institution can store enrollment management information such as target enrollment numbers and actual enrollment numbers. You have the ability to group both of these sets of enrollment numbers into sets of levels you define.
- Loading and Assigning EPS Market Codes describes how to load and assign the College Board's proprietary market codes used to categorize external institutions into geographic areas.
- Deleting Prospect and Applicant Information shows you, if a prospect or applicant was inadvertently added to the system by error how to quickly delete a prospect record, an applicant record, and associated 3C information.
- Running a Year to Year Comparison Report describes the delivered Admissions Funnel report you can use to report on your prospect and applicant numbers across one or multiple terms.
- Reviewing PeopleSoft Recruiting and Admissions Reports lists all the reports discussed in the PeopleSoft Recruiting and Admissions PeopleBook and provides more information about selected reports.

Standard Field Definitions and the Glossary of Terms

For a list of definitions of terms and acronyms frequently used throughout PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions, see *PeopleSoft Student Administration Solutions Fundamentals PeopleBook:* Glossary of Terms and Acronyms.

For a list of Standard Fields used in PeopleSoft documentation, see *About These PeopleBooks:* PeopleBooks Standard Field Definitions.

PeopleSoft Recruiting and Admission Integration

PeopleSoft Recruiting and Admissions shares data with PeopleSoft Campus Community, Student Financials, and Student Records. By sharing data, PeopleSoft Recruiting and Admissions prevents users from having to enter data into the system multiple times.

PeopleSoft Recruiting and Admissions integrates with other applications in the following ways:

- PeopleSoft Campus Community shares people data, such as names and addresses, and external organization data, for prospect, application and transcript processing, with PeopleSoft Recruiting and Admissions.
- PeopleSoft Recruiting and Admissions uses Student Financials functionality to process application fees and application deposits.
- PeopleSoft Recruiting and Admissions transfers application data with PeopleSoft Student Records once applicants have been matriculated. PeopleSoft Student Records can then build student program and plan records without having to re-enter large amounts of information.

CHAPTER 2

Building Your Recruiting Structure

This chapter discusses how to:

- Set up your recruiting structure.
- Define recruiters.

Setting Up Your Recruiting Structure

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

This section discusses how to:

- Set up region codes.
- Define postal codes.
- Set up region trees.
- Activate region trees.
- Set up recruiting categories.
- Set up application processing centers.

Pages Used to Set Up Your Recruiting Structure

Page Name	Object Name	Navigation	Usage
Region Table	REGION_TABLE	• Design Student Administration, Design Admissions, Setup, Region Table, Region Table • Develop Enrollment, Manage Recruiters, Setup, Region Table, Region Table	Define the geographic regions that your academic institution uses for recruiting and admissions.

Page Name	Object Name	Navigation	Usage
Region Postal Table	REG_POSTAL_TABLE	Design Student Administration, Design Admissions, Setup, Region Postal Table, Region Postal Table	Define postal codes for use in your region tree. You can define any number of postal codes for your regional recruiting purposes. Postal codes are used as the detail values, or *leaves,* of your region tree. It is vital to keep the region postal codes that you define on this page synchronized with the detail values on your region tree. Plan out your postal code values and enter them here before entering them into the region tree.
Update Region SetID Effdt (update region setID effective date)	RUNCTL_AD505	Develop Enrollment, Manage Recruiters, Process, Update Region Setid Effdt	Run the AD505 process, which activates region trees.
Recruiting Category Table	RECRUIT_CAT_TABLE	• Design Student Administration, Design Admissions, Setup, Recruiting Category Table, Recruiting Category Table • Develop Enrollment, Manage Recruiters, Setup, Recruiting Category Table, Recruiting Category Table	Set up your recruiting categories.
Recruiting Center Table	ADM_RECRCTR_TABLE	• Design Student Administration, Design Admissions, Setup, Recruiting Center Table, Recruiting Center Table • Develop Enrollment, Manage Recruiters, Setup, Recruiting Center Table, Recruiting Center Table	Create the admission recruiting centers for your institution.
Application Center Table	ADM_APPLCTR_TABLE	• Design Student Administration, Design Admissions, Setup, Application Center Table, Application Center Table • Develop Enrollment, Manage Recruiters, Setup, Application Center Table, Application Center Table	Set up your application centers.

Setting Up Region Codes

Access the Region Table page.

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

Setting Up Region Trees

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

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

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

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

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

Enter Regions in the Region Table Page

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

Set Up Postal Codes on the Region Postal Code Table Page

Before you can define postal code values (detail values) on your tree, you must set up all of your postal codes on the Region Postal Table page. To verify that a detail exists on the Region Postal Table page, right-click that detail in the region tree. If you receive a message that the value is not found, then you must go to the Region Postal Table page and set it up. It is extremely important to keep the region postal codes on the Region Postal Table page synchronized with the detail values of your region tree.

Define a Region Tree for Recruiting and Admissions

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

To set up your region tree, selectPeopleTools, Tree Manager. Select the ADMISSIONS file cabinet. Highlight the delivered REGION tree. Then select File, New.

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

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

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

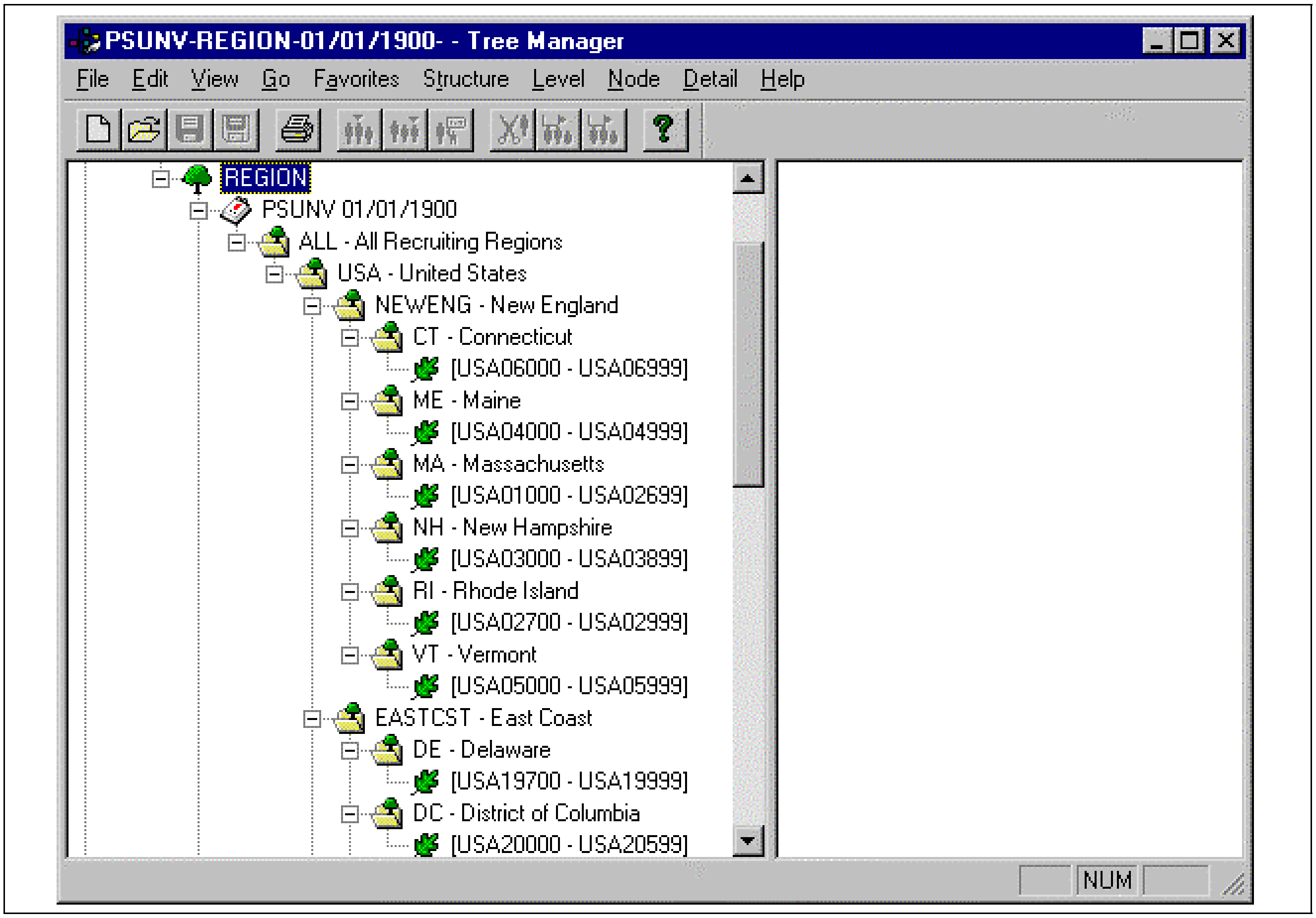
- The All Detail Values in This Tree check box is cleared.
- The Allow Duplicate Detail Values check box is cleared.
- The Strictly Enforced option is selected.
- Enter your institution's setID and an effective date. When you click OK, you return to the PeopleSoft Tree Manager panel, with the name of your region tree highlighted. The name of your region tree is the setID plus the effective date.

Delivered Region Tree Examples

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

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

The following is an example of part of the delivered PSUNV region tree.



PeopleSoft Tree Manager displaying part of the sample PSUNV region tree

See Also

Chapter 2, "Building Your Recruiting Structure," Setting Up Region Codes, page 6

Chapter 9, "Recruiting Prospective Students," page 77

PeopleSoft PeopleTools PeopleBook: Tree Manager

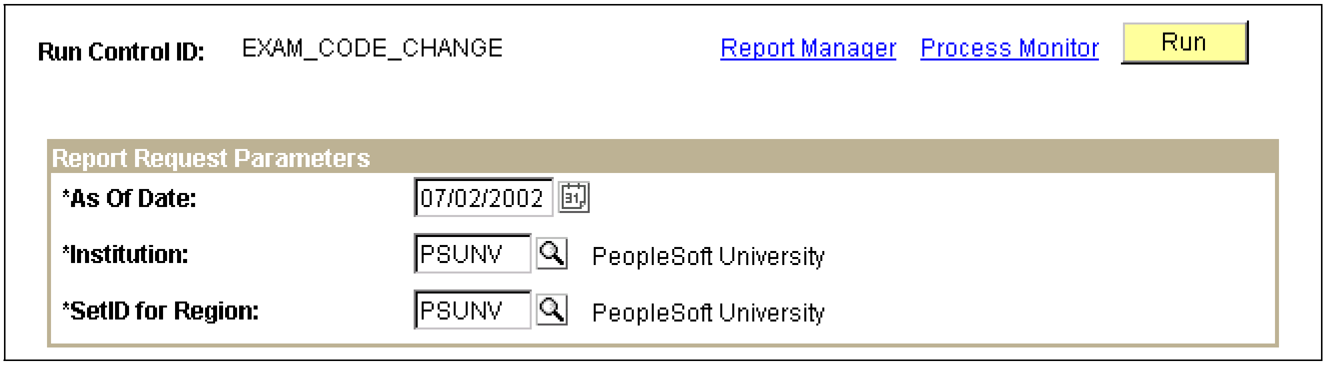
PeopleSoft PeopleTools PeopleBook: Tree Manager, "Printing a List of Regions"

Activating Region Trees

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

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

Access the Update Region SetID Effdt page.



Update Region Setid Effdt page

As Of Date Enter a date equal to the effective date of the region tree.

Institution Enter the institution for which the region tree will be used.

SetID for Region Enter the setID that was used when creating the region tree.

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

Setting Up Recruiting Categories

Access the Recruiting Category Table page.

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

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

Recruitment Group Assign the recruiting category to a recruitment group. Your choices are *Academic, Alumni, Athletics, Music, Region,* and *Special.* Recruitment groups are delivered with your system as translate values. You can modify these translate values.

Important! Do not change or delete the translate value *Region.* It's required for automated region and recruiter assignment.

Move to Application Select to copy this recruiting information to the application record when the prospect who is assigned to this category becomes an applicant.

Academic Career Indicator Select to limit the recruiting category to one career. For example, you can create a recruiting category called *EXTV* for those prospects who are currently business executives and define it so that it's only available to your *BUSN* (graduate business) academic career. Enter the career to which you want the category limited in the Academic Career field.

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

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

Setting Up Recruiting Centers

Access the Recruiting Category Table page.

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

Academic Career Select an academic career if you want this recruiting center associated with only *one* academic career. If you want the recruiting center available to *all* academic careers, leave this field blank.

See Also

Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 12

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Recruiting and Admissions"

Setting Up Application Processing Centers

Access the Application Center Table page.

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

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

Academic Career Select an academic career if this application center is for *one* academic career only. If you want this application center available to *all* careers, leave this field blank. Define academic careers on the Academic Career Table page.

Application Fee Code Select the appropriate application fee code for this application center. Define application fee codes on the Application Fees page in PeopleSoft Student Financials. If you do not charge an application fee, you can leave this field blank.

Deposit Fee Code Select the appropriate deposit fee code used for this application center. Define deposit fee codes on the Deposit Fees page in PeopleSoft Student Financials. If you do not charge deposits, you can leave this field blank.

Calculate Deposit Fee in Batch Select if you want to allow users to *save* applications without calculating a deposit fee. When you enter a status of *Admitted* on the Application Program Data page, the system does *not* prompt you to calculate the deposit. Rather, you use the Deposit Fees Calc (deposit fees calculation) batch process (SFPBADEP) to calculate the deposit fee. This enables you to automate the deposit fee calculation process.

If you clear this check box, the system *does* prompt you to calculate a deposit fee when you enter a status of *Admitted* on the Application Program Data page.

SF Merchant ID Select a merchant ID for the application center. The merchant ID is a user-defined element that defines the rules for interfacing with a third-party credit card processor. Define student financials merchant IDs on the SF Merchants page in PeopleSoft Student Financials. Leave this blank if you either do not accept credit cards for application fees or do not process application fees at all.

See Also

Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 12

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 165

PeopleSoft 8 SP1 Student Financials PeopleBook, "Setting Up Credit Card Processing and Self Service," Setting Up SF Merchants

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Recruiting and Admissions"

Defining Recruiters

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

This section lists prerequisites and discusses how to:

- Designate individuals in your system as recruiters.
- Assign recruiters to recruiting categories.
- Associate recruiters with recruiting and application centers.
- Link recruiters with academic programs and academic plans.

Prerequisites

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

To see if the recruiter is already in your system, select Develop Enrollment, Manage Recruiters, Inquire, Search Match.

If you discover that the recruiter does *not* yet exist in your system, you can quickly add a record by choosing Develop Enrollment, Manage Recruiters, Use, Bio/Demo Data.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Searching for Records,” Using Search/Match

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Adding People to Your Database

Pages Used to Identify Recruiters

Page Name	Object Name	Navigation	Usage
Recruiters	RECRUITERS	Develop Enrollment, Manage Recruiters, Use, Recruiters, Recruiters	Designate a person as a recruiter or to update a recruiter's information.
Recruiter Categories	RECRUITER_RCR_CAT	Develop Enrollment, Manage Recruiters, Use, Recruiters, Recruiter Categories	Assign recruiting categories to recruiters. This aids in recruiter assignment. You also assign recruiting categories to prospects and applicants, enabling you to match appropriate recruiters to prospective students.
Recruiter Regions	RECRUITER_REGIONS	Develop Enrollment, Manage Recruiters, Use, Recruiters, Recruiter Regions	Link recruiters at the career level to specific geographic regional assignments. You can also use this page to exclude recruiters from certain regions. For example, you can assign a recruiter to the Texas region, but *exclude* him or her from Abilene and Waco. You also link prospects and applicants to geographic regions, enabling you to match appropriate recruiters to prospective students.
Recruiter Centers	RECRUITER_CENTERS	Develop Enrollment, Manage Recruiters, Use, Recruiters, Recruiter Centers	Link a recruiter to the appropriate recruiting and application centers, which is beneficial for grouping and reporting purposes. You can link prospects to recruiting centers and applicants to application centers.
Recruiter Programs	RECRUITER_PROGRAMS	Develop Enrollment, Manage Recruiters, Use, Recruiters, Recruiter Programs	Link recruiters to academic programs and academic plans.

Designating Recruiters

Access the Recruiters page.

Recruiter Type Select a recruiter type for this person. Your options are *Alumni, Faculty, Staff,* and *Student.* Recruiter types are delivered with your system as translate values. You can modify these translate values.

Recruiter Role Select one or more recruiter roles for this person. In our example, James Alonzo is both an evaluator and an interviewer. Add as many recruiter roles as are pertinent to this person. A recruiter can recruit for more than one career. Add the recruiter again, only enter the pertinent academic career when prompted.

Recruiter roles are delivered with your system as translate values. You can modify these translate values.

Assigning Recruiters to Recruiting Categories

Access the Recruiter Categories page.

Category

Select the appropriate recruiting categories for this recruiter. Define categories on the Recruiting Category Table page. In the preceding page example, this recruiter is assigned to the *High Test Scores* and *Region* recruiting categories.

Group

The group to which this category belongs.

Assignment Stage

For each category, select the appropriate stage of recruiting in which this recruiter is involved. Your choices are *Applicant, Prospect/Applicant,* and *Prospect.* For basketball and region, our example recruiter looks at prospects and applicants; but for track and field recruiting, he only deals with actual applicants. Values for this field are delivered with your system as translate values. You can modify these translate values.

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

Linking Recruiters to Geographic Regions

Access the Recruiter Regions page.

Stage

Select the stage of recruitment in which this recruiter is involved for this region. Your choices are *Applicant, Prosp/Appl* (prospect/applicant), and *Prospect.* Stage values are delivered with your system as translate values. Any modifications to these values require a substantial programming effort.

Region

Select a region for this recruiter. This can be a region where this person recruits, or a region where this person does *not* recruit. Define regions on the Region Table page.

Include/Exclude

Choose whether to *Include* the recruiter in or *Exclude* the recruiter from this region. If you select *Include,* the recruiter can be assigned to prospects or applicants in any school in that region. If you select *Exclude,* the recruiter can not be assigned to prospects or applicants in any school in that region.

Note. First add the regions where this person recruits. Then, if you must exclude the person from certain areas, add those rows last.

External Org ID (external organization ID)

If you want a recruiter to recruit at a school in a region from which he or she is excluded (for example, include a school in an excluded region), or if you do not want a recruiter to recruit at a school in a region in which he or she is included (for example, exclude a school from an included region), select the external organization ID of the school you are including or excluding. All schools within the postal code range of the selected region are available.

Note. Be aware that you can only exclude or include a school (in the External Org ID field) from a region if the Region value entered is at the *lowest level region node* on your region tree. If the region value is at any other level, you cannot access the External Org ID field.

Include/Exclude The display-only Include/Exclude field (next to the External Org ID field) automatically contains the opposite value of that entered in the Include/Exclude field (below the Region field).

An Example of Including and Excluding Regions and Schools

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

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

Associating Recruiters with Recruiting and Application Centers

Access the Recruiter Centers page.

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

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

Note. For recruiters to have access to prospects and applicants within the recruiting and application centers that you select, you must grant the recruiters security access to these recruiting and application centers.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Securing Recruiting and Admissions”

Linking Recruiters with Academic Programs and Academic Plans

Access the Recruiter Centers page.

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

Academic Program	Select the academic programs in which this recruiter is involved.
Academic Plan	Select the academic plans, within the chosen academic programs, that apply to this recruiter.

CHAPTER 3

Setting Up Prospects

This chapter discusses how to :

- Set up admissions installation defaults.
- Set up admit types.
- Set up referral sources.
- Set up school types.
- Set up extracurricular activities.
- Set up honors and awards.
- Set up student groups.
- Set up external summary types.
- Set up GPA tables.
- Set up student response.
- Review material types and define material groups.

Setting Up Admission Installation Defaults

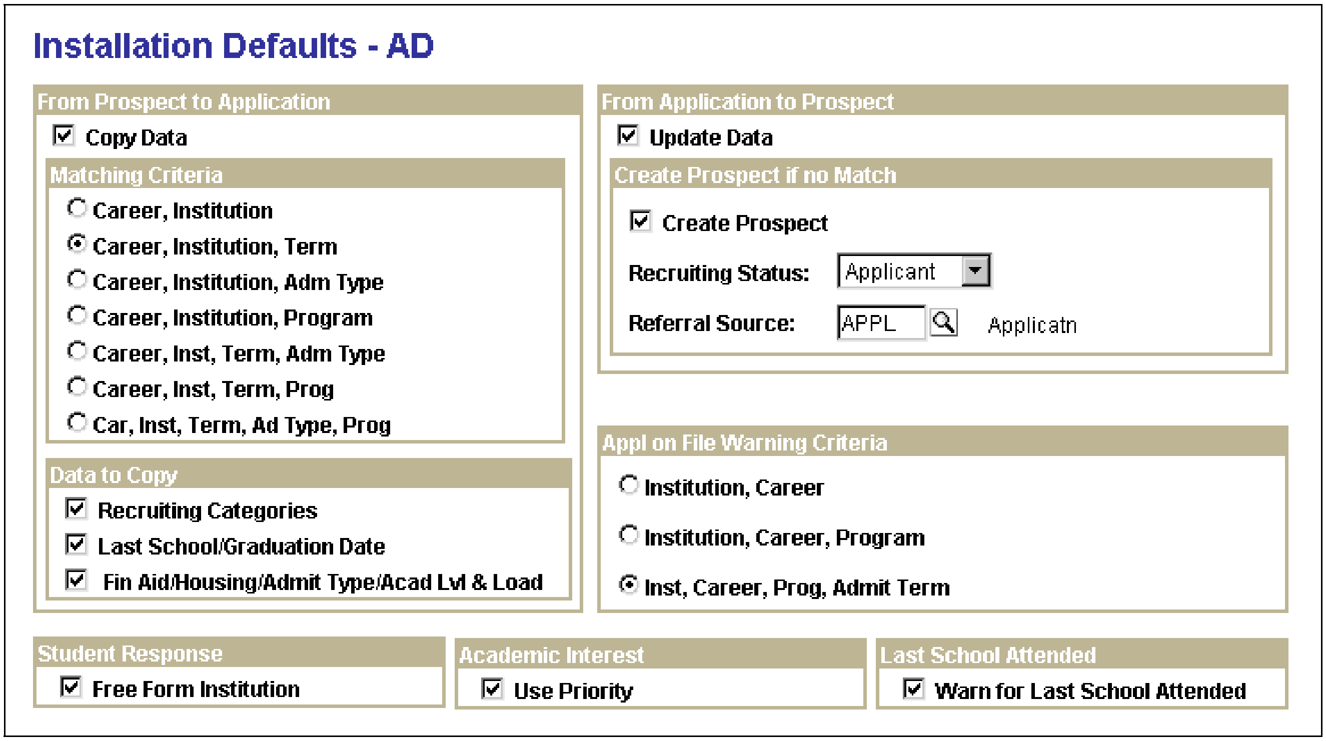
This section discusses how to set up admission installation defaults.

Page Used to Set Up Admission Installation Defaults

Page Name	Object Name	Navigation	Usage
Installation Defaults – AD	INSTALLATION_AD	Design Student Administration, Design Admissions, Setup, Installation Defaults - AD, Installation Defaults - AD	Set up defaults, such as for copying information between application and prospect records. For example, when you add an application record, and a prospect record exists for that applicant, you might want to copy some of the information from the prospect record to the application record.

Setting Up Admission Installation Defaults

Access the Installation Defaults – AD page.



Installation Defaults - AD page

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

From Prospect to Application

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

Matching Criteria

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

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Setting User Defaults".

Data to

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

- Recruiting categories.
- Last school attended and graduation date.
- Financial aid, housing, admit type, and academic level and load.

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

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

See Chapter 9, "Recruiting Prospective Students," Adding Prospects, page 77.

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

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

From Application to Prospect

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

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

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

Create Prospect if no Match

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

Create Prospect	Select this check box to create a retroactive prospect record for an applicant. You must have selected the Update Data check box. When you save the new application, the system automatically creates a prospect record. The new record contains the following data from the application: admit term, admit type, campus, academic level, academic load, academic program, academic plan and sub-plan, recruiting status, application number, status date, last school attended, graduation date and region. Recruiting center comes from your user defaults. Additionally, the application number appears on the Prospect Program Data page in the Prospect Data component, and the Applied field is selected on

the Prospect Career Data page in the Prospect Data component. The system only creates a prospect if a recruiting center is defined in your user defaults.

Recruiting Status and **Referral Source**

If you selected the Create Prospect check box, enter a recruiting status and a referral source on the new prospect record. Recruiting status values are delivered with your system as translate values. You can modify these translate values. Define referral sources on the Referral Source Table page.

Appl on File Warning Msg Matching Criteria

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

Institution, Career

If an application for this person exists with the same institution and career as the application that you are saving, a warning message appears.

Institution, Career, Program

If an application for this person exists with the same institution, career, and programs as the application that you are saving, a warning message appears.

Institution, Career, Program, Admit Term

If an application for this person exists with the same institution, career, program, and admit term as the application that you are saving, a warning message appears.

If the system detects a potential duplicate when you save an application, you get a warning such as the following:

“An application with Career (UGRD), Program (LAU), Admit Term (0450) and Institution (PSUNV) already exists.

If you would like to create a new application with the same Career, Program, Admit Term and Institution push the OK button, otherwise push the Cancel button.”

Student Response

Free Form Institution

Select this check box to allow your users to enter a free-form institution name on the Student Response page and to allow students to enter a free form name on the self-service Accept Admissions page. If you want users to select from a list of external organizations that your institution has, clear this check box.

You can use the Student Response page to capture reasons why a prospect or applicant chose or rejected your institution. This is important information that your institution might want to track and report on. Your institution has the option of allowing end users to enter the free-form name of a school when they capture data on the Student Response page. You might want to enable this option (on the Installation Defaults - AD1 page) because a student can choose to attend an institution that is not loaded as an external organization in your system.

See Chapter 14, "Adding and Updating Applications," Updating Applications, page 192.

Academic Interest

Use Priority

Select this check box to enable the Academic Interest Priority feature. To disable the Academic Interest Priority feature for your institution, clear this check box.

The Academic Interest Priority feature enables you to capture and view a prospect's or applicant's academic interest priority ranking level. For example, pre-law could be their first level academic interest priority and technology could be their second level academic interest priority. This feature can help in your enrollment management, recruiting efforts, and reporting program evaluation. If you enable this feature, the Priority field becomes active on the Academic Interests page.

See Chapter 10, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 101.

Last School Attended

Warn for Last School Attended

Select this check box to have the following warning message appear: "Academic history not being updated." The message only appears if you don't enter a value in the Last School Attended field on the Prospect School/Region page or the Application School/Recruiting page or if you enter the last school attended after you add the initial time that you add the person.

This warning message applies to the data entry of both prospects and applicants.

Setting Up Admit Types

This section discusses how to set up admit types.

Page Used to Set Up Admit Types

Page Name	Object Name	Navigation	Usage
Admit Type Table	ADMIT_TYPE_TABLE	Design Student Administration, Design Admissions, Setup, Admit Type Table, Admit Type Table	Define your institution's admit type values. You can assign an admit type to prospects and applications to clarify the type of prospect or applicant, such as first year, readmit, or transfer.

Setting Up Admit Types

Access the Admit Type Table page.

Academic Career — Select the academic career to which this admit type is related if you want this type available for *only* that career. Do *not* select an academic career if you want this admit type available for *all* careers.

Readmit Processing Required — Select this check box if the admit type requires you to admit a person into an existing student record (for example, a person applies to reenter a career). When this admit type is entered on an application record, the system populates an existing program record rather than create a new record when the person matriculates.

Setting Up Referral Sources

This section discusses how to set up referral sources.

Page Used to Set Up Referral Sources

Page Name	Object Name	Navigation	Usage
Referral Source Table	REFERL_SRCE_TABLE	Design Student Administration, Design Admissions, Setup, Referral Source Table, Referral Source Table	Define your referral sources and track how prospects or applicants learned of your institution. A referral source indicates why this person was originally added to your database.

Setting Up Referral Sources

Access the Referral Source Table page.

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

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

See Also

Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 19

Setting Up School Types

This section discusses how to set up school types.

Page Used to Set Up School Types

Page Name	Object Name	Navigation	Usage
School Type Table	SCHOOL_TYPE_TABLE	Design Student Administration, Design Admissions, Setup, School Type Table, School Type Table	Set up school types and categorize external organization material.

Setting Up School Types

Access the School Type Table page.

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

Advisement School Type If this is an advisement school, select an advisement school type. Values for this field are delivered with your system as translate values. You can modify these translate values. When you are defining a school type code, you must also specify whether this school type can be used with the Student Response feature.

Use Within Student Response Select this check box to enable student response reasons when defining a school type on the School Type Table page.

Canadian School Govt Class (Canadian school government class) This field appears only if your system installation country equals *CAN.* In order to report the correct value for the school type, select a Canadian classification value.

See Also

Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 19

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Setting Up Organization Data"

Setting Up Extracurricular Activities

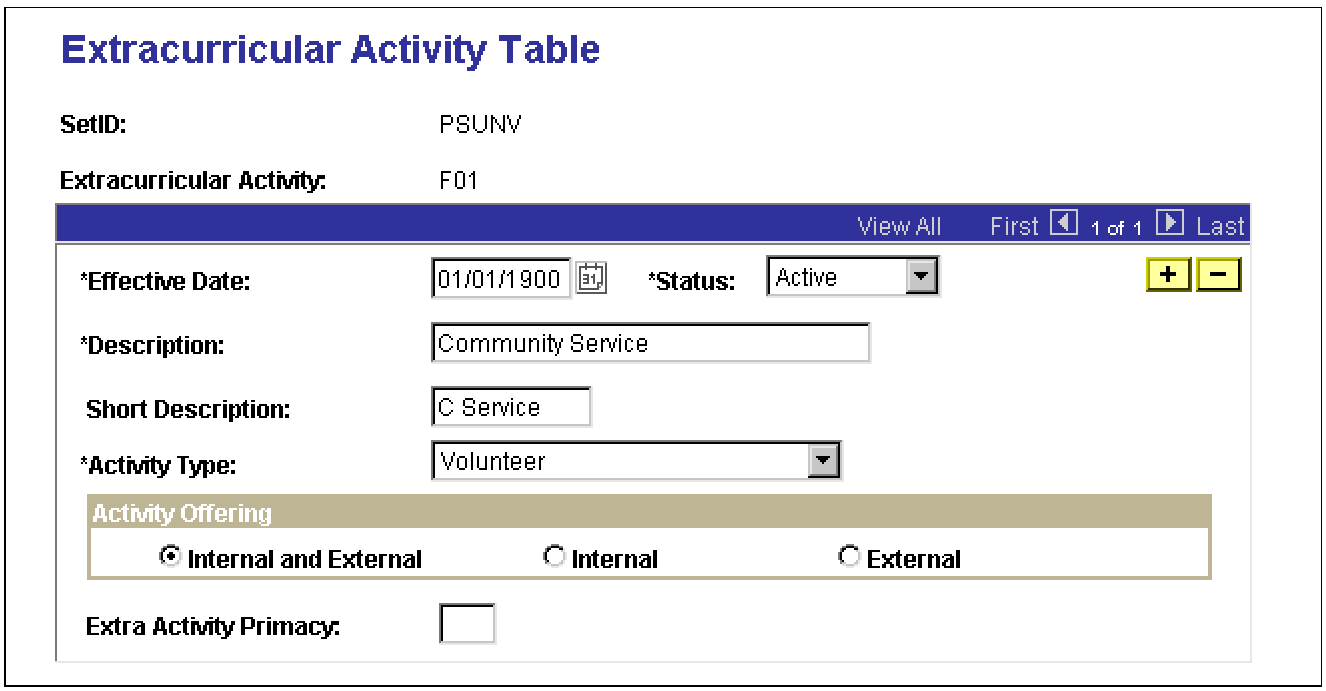
This section discusses how to set up extracurricular activities.

Page Used to Set Up Extracurricular Activities

Page Name	Object Name	Navigation	Usage
Extracurricular Activity Table	EXTRA_ACTIVITY_TBL	• Design Student Administration, Define Student Administration, Setup, Extracurricular Activity Tbl, Extracurricular Activity Table • Manage Student Records, Track Student Careers, Setup, Extracurricular Activity Tbl, Extracurricular Activity Tbl	Define extracurricular activities for tracking, reporting, and recruiting and admission purposes.

Setting Up Extracurricular Activities

Access the Extracurricular Activity Table page.



Extracurricular Activity Table page

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

Activity Offering

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

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

Internal The activity is offered by your institution only. These activities are available only in PeopleSoft Student Records.

External The activity is offered by an external organization only. These activities are available only in PeopleSoft Recruiting and Admissions.

Additional Elements

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

Setting Up Honors and Awards

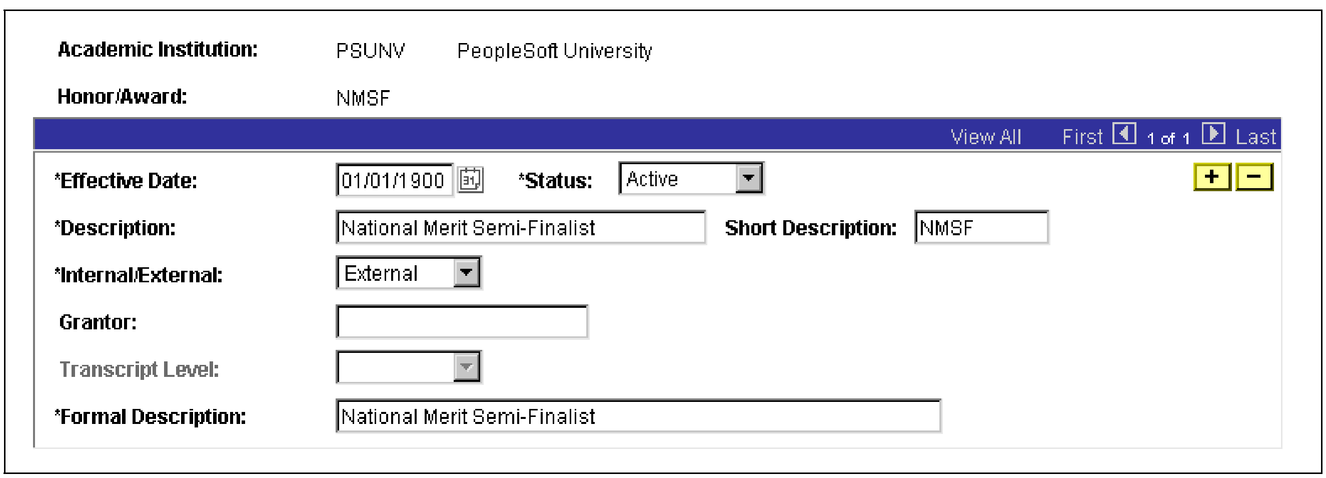
This section discusses how to set up honors and awards.

Page Used to Set Up Honors and Awards

Page Name	Object Name	Navigation	Usage
Honors/Awards Table	SA_HON_AWRD_TABLE	• Design Student Administration, Define Student Administration, Setup, Honors/Awards Table, Honors/Awards Table • Design Student Administration, Define Student Records, Setup, Honors/Awards Table, Honors/Awards Table • Manage Student Records, Manage Academic Records, Setup, Honors/Awards Table, Honors/Awards Table • Manage Student Records, Track Student Careers, Setup, Honors/Awards Table, Honors/Awards Table	Define internal and external honors and awards.

Setting Up Honors and Awards

Access the Honors/Awards Table page.



Honors/Awards Table page

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

Internal/External Select whether this award or honor is internal or external to your institution.

Grantor Enter a grantor if one is associated with this award.

Transcript Level

Select the transcript level for which you want the honor or award to appear: *Degr Prog (degree program), Not Print, Official, Stdnt Life (student life),* or *Unofficial.* This field is only available if the Internal/External field is set to *Internal.*

The transcript level is hierarchical, based on the two position numeric codes in the value column of the translate table. Depending on the transcript level that you select, the system prints the honor or award on that transcript type and all other transcript types occurring below it on the translate table.

For example, if you select *Official* for your transcript level (which has a level value of 20 on the translate table), the system prints the honor or award on all transcript types.

If you select *Stdnt Life* for your transcript level (which has a level value of 60 on the translate table), the system prints the honor or award only on student life transcripts (level 60) and PeopleSoft Academic Advisement degree progress transcripts (level 80). The following table shows the hierarchy of these transcript level values.

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

Formal Description

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

Setting Up Student Groups

This section discusses how to set up student groups.

Page Used to Set Up Student Groups

Page Name	Object Name	Navigation	Usage
Student Group Table	STDNT_GROUP_TABLE	• Design Student Administration, Define Student Administration, Setup, Student Group Table, Student Group Table • Design Student Administration, Define Student Records, Setup, Student Group Table, Student Group Table	Define student groups and track particular groups to which a prospect or applicant belongs. This data supports application information. You can define any groups that you want to record for a prospect, applicant, or student. Student groups are also used in PeopleSoft Student Records.

Setting Up External Summary Types

This section discusses how to set up external summary types.

Page Used to Set Up External Summary Types

Page Name	Object Name	Navigation	Usage
External Summary Type Table	EXT_SUMM_TYPE_TBL	Design Student Administration, Design Admissions, Setup, External Summary Type Table, External Summary Type Table	Define the types of summary education information that you want to capture from a prospect or applicant. For example, you might define external summary types that mirror academic levels on a transcript, such as High School Grade 9, High School Overall, Undergraduate Third Year, and Post-Baccalaureate Overall.

Setting Up GPA Tables

This section discusses how to:

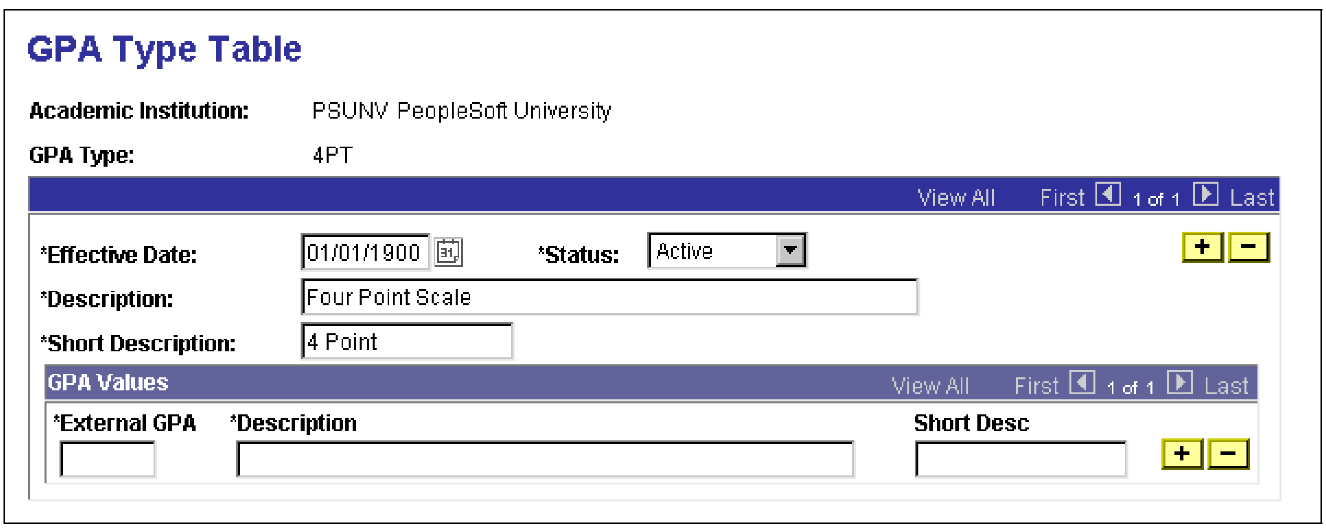
- Define GPA type codes.
- Set up GPA conversion rules.

Pages Used to Set Up GPA Tables

Page Name	Object Name	Navigation	Usage
GPA Type Table	GPA_TYPE_TABLE	• Design Student Administration, Design Admissions, Setup, GPA Type Table, GPA Type Table • Develop Enrollment, Evaluate Applicants, Setup, GPA Type Table, GPA Type Table	Set up grade point average types for external organizations.
GPA Rules Table	GPA_RULES_TABLE	• Design Student Administration, Design Admissions, Setup, GPA Rules Table, GPA Rules Table • Develop Enrollment, Evaluate Applicants, Setup, GPA Rules Table, GPA Rules Table	Define your GPA conversion rules.

Defining GPA Type Codes

Access the GPA Type Table page.



GPA Type Table page

Defining the External GPAs

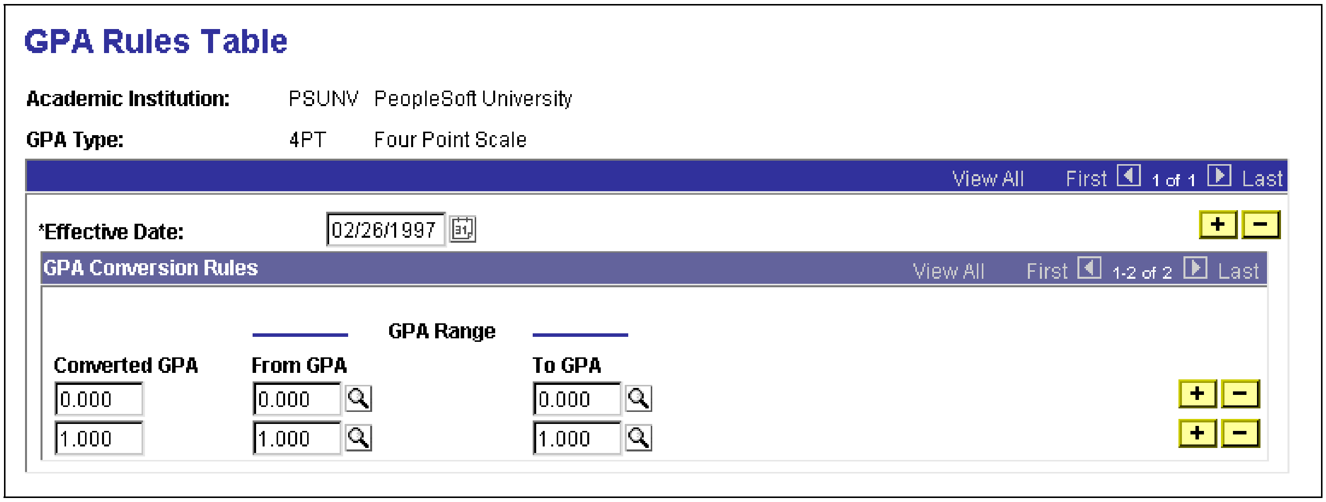
If the outside GPA type has a name that is not descriptive or self-evident, you can use the GPA values portion of this page to more clearly define the external GPAs that belong to this GPA type.

External GPA Enter the external GPA value for each GPA value.

Short Description — Enter a short description—up to 15 characters—for each GPA value. You do not need to fill in GPA values if it is clear from the GPA type name exactly what it means.

Setting up GPA Conversion Rules for GPA Types

Access the GPA Rules Table page.



GPA Rules Table page

Effective Date — Enter an effective date for this GPA rule. If the effective date is equal to or greater than the effective date for this GPA type, then this GPA rule is active.

Converted GPA — Enter the converted GPA that applies to the range entered in the From GPA and To GPA fields.

From GPA and **To GPA** — You can enter any numeric value in these fields. If you defined GPA values (on the GPA Type Table page) for this GPA type, you can prompt for those values, but you are still free to enter values that are not defined. You can add as many converted GPAs as needed for a GPA type.

Setting Up Student Response

This section discusses how to set up the reasons why a prospect or applicant chose or rejected your institution You can set up a series of adapted reason response codes that enable you to capture and track the specific information that you want. You can use the Student Response page to capture why students *did select* your school, or why students chose *not* to attend your school and where they are going instead. If a student has multiple applications on file, a response can be captured for each individual application.

See Also

Chapter 14, "Adding and Updating Applications," Updating Applications, page 192

Page Used to Set Up Student Response

Page Name	Object Name	Navigation	Usage
Student Response Reason Table	RESP_RSN_TABLE	Design Student Administration, Design Admissions, Setup, Response Reason Table, Student Response Reason Table	Define reason codes for capturing the reason why a student decided to attend another institution.

Enabling Student Response for a School Type

Each external organization that you define in the system must have a school type code assigned to it. When you define a school type code, you must specify whether this school type will be considered when using the Student Response feature. Then, when you use the Student Response page, the External Org ID (external organization ID) field prompt dialog box displays a list of external organizations whose school type codes have the Student Response option enabled. Use the School Type Table page to enable the Student Response feature for school types.

See Also

Chapter 3, "Setting Up Prospects," Setting Up School Types, page 24

Reviewing Material Types and Defining Material Groups

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

This section discusses how to:

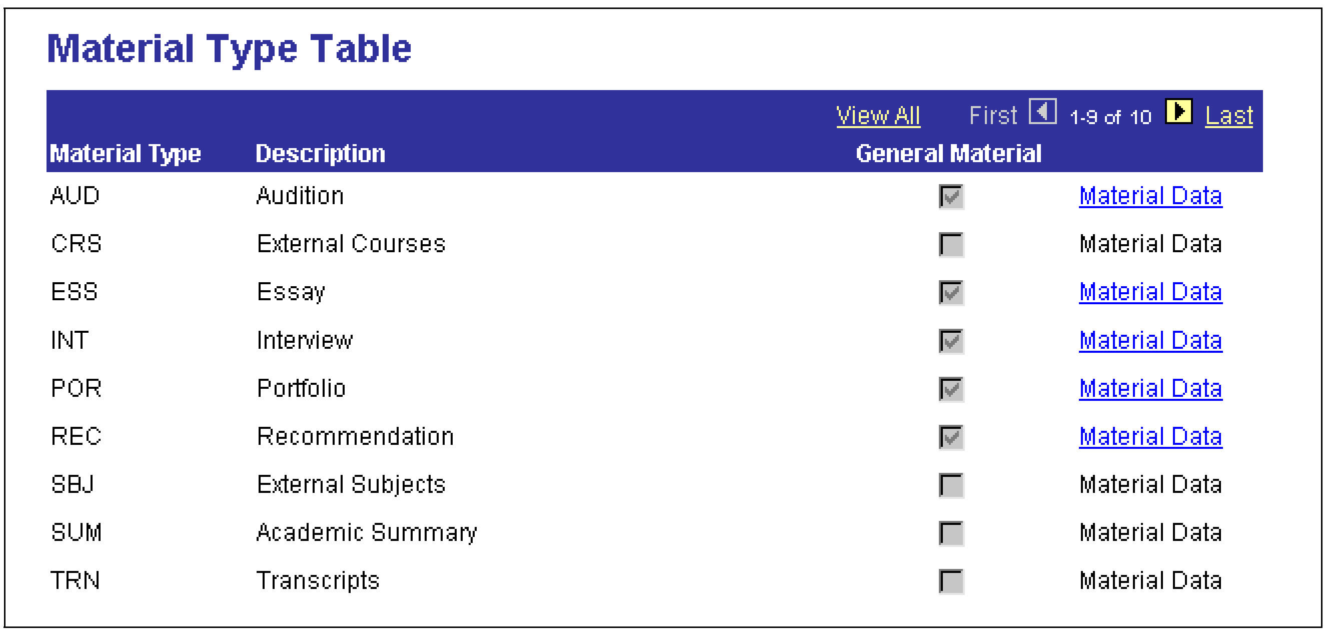
- View material types.
- Set up material groups.

Pages Used to Review Material Types and Define Material Groups

Page Name	Object Name	Navigation	Usage
Material Type Table	MATL_TYPE_TABLE	Design Student Administration, Design Admissions, Inquire, Material Type Table, Material Type Table	View material types and their material data.
Material Type Field Usage	MATL_TYPE_SP	Click the Material Data link on the Material Type Table page to view the Material Type Field Usage page.	Review additional material data content.
Material Group Table	MATL_GRP_TYP_TABLE	Design Student Administration, Design Admissions, Setup, Material Group Table, Material Group Table	Define material types into groups. For example, you can have one group of materials for undergraduate auditions, one for graduate test scores, one for medical external courses, and so on.

Viewing Material Types

Access the Material Type Table page.


Material Type Table

View All First 1-9 of 10 Last

Material Type	Description	General Material	
AUD	Audition	☑	Material Data
CRS	External Courses	☐	Material Data
ESS	Essay	☑	Material Data
INT	Interview	☑	Material Data
POR	Portfolio	☑	Material Data
REC	Recommendation	☑	Material Data
SBJ	External Subjects	☐	Material Data
SUM	Academic Summary	☐	Material Data
TRN	Transcripts	☐	Material Data

Material Type Table page

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

General Material Material types that are designated as general materials—the check box is selected—appear as a material type on the General Materials page. When you enter general materials for a prospect or applicant, you can choose only those designated material types.

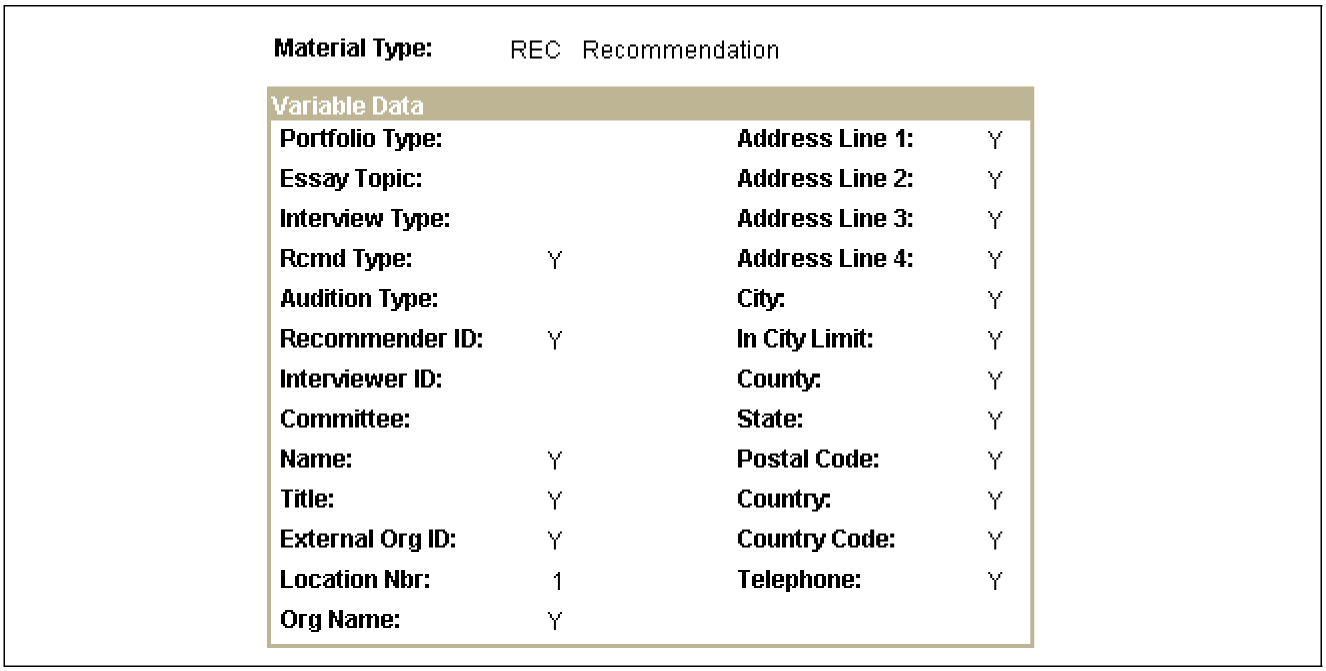
Material types that are not indicated as general materials—the check box is cleared—appear on the Application Materials page.

Material Data

Click this link to display the Material Type Field Usage page. This page is for informational purposes only. All items marked with a *Y* or a *1* on the Material Type Field Usage page are available to add to an application record on the General Materials page. For example, the Recommendation material type contains a *Y* for city, but nothing for essay topic. Thus, on the General Materials page you can enter a city for the prospect but not an essay topic.

Using the Material Type Field Usage Page

Access the Material Type Field Usage page



Material Type Field Usage page

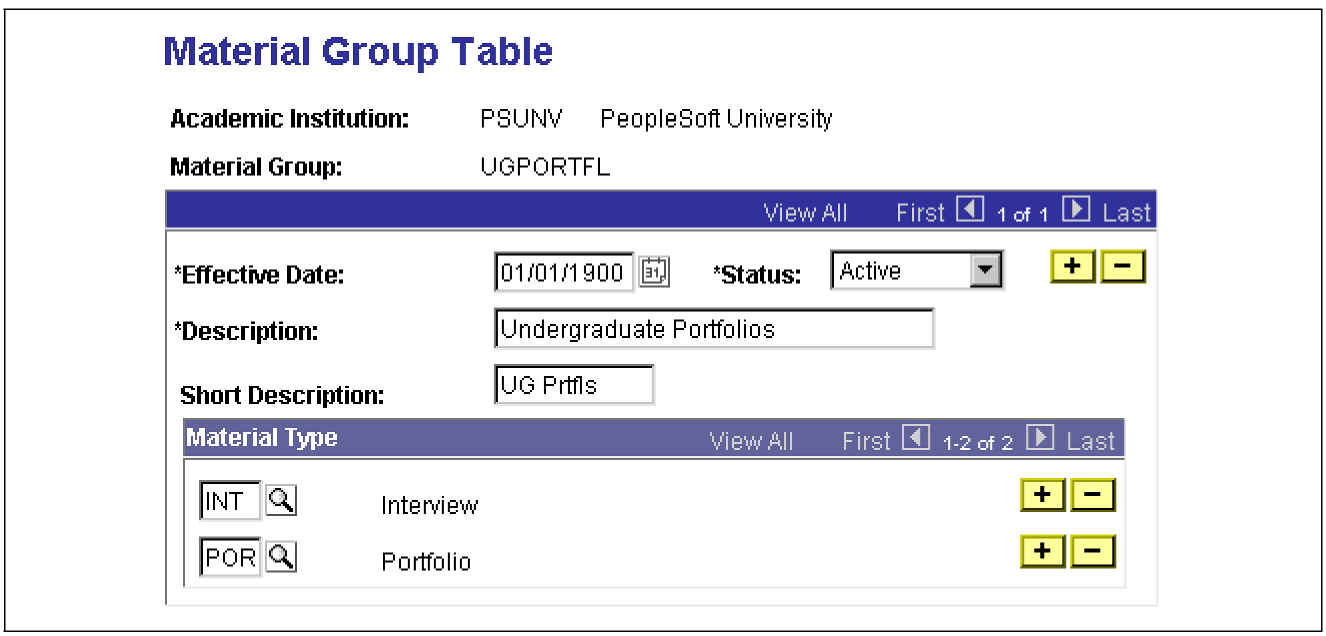
If the General Material check box is cleared on the Material Type Table page, then that material type is stored elsewhere for each person and then linked to actual applications on the Application Materials page. For example, test scores (not a general material type) are linked to a person's ID on the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

Material Type Values	General Material?
AUD - Audition	Y
CRS - External Courses	N
ESS - Essay	Y

Material Type Values	General Material?
INT - Interview	Y
POR - Portfolio	Y
REC - Recommendation	Y
SBJ - External Subjects	N
SUM - Academic Summary	N
TRN - Transcripts	N
TST - Test Scores	N

Setting Up Material Groups

Access the Material Group Table page.



Material Group Table page

Material Type

Select the material types that you want in this group. A material group can consist of one or more material types. For example, you can define a group called Undergraduate Recommendations and assign the material type *Recommendation.* You can define another group called Undergraduate Portfolios and include the material types *Interview* and *Portfolio.* Also, a material type can be assigned to as many material groups as needed.

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

CHAPTER 4

Setting Up Self-Service Request Information

The chapter provides an overview of self-service request information and discusses how to set up self-service request information.

Understanding Self-Service Request Information

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the Learner Services 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".

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

Prerequisites

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

Note. To access the Communication Comm Keys page, you must enter an administrative function. Enter *PSSV* (prospect self-service).

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

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

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

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Communications,” Defining Communication Speed Keys

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Events Data,” Creating an Event

Requesting Self-Service Information

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

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

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

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

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services 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”

Setting Up Self-Service Request Information

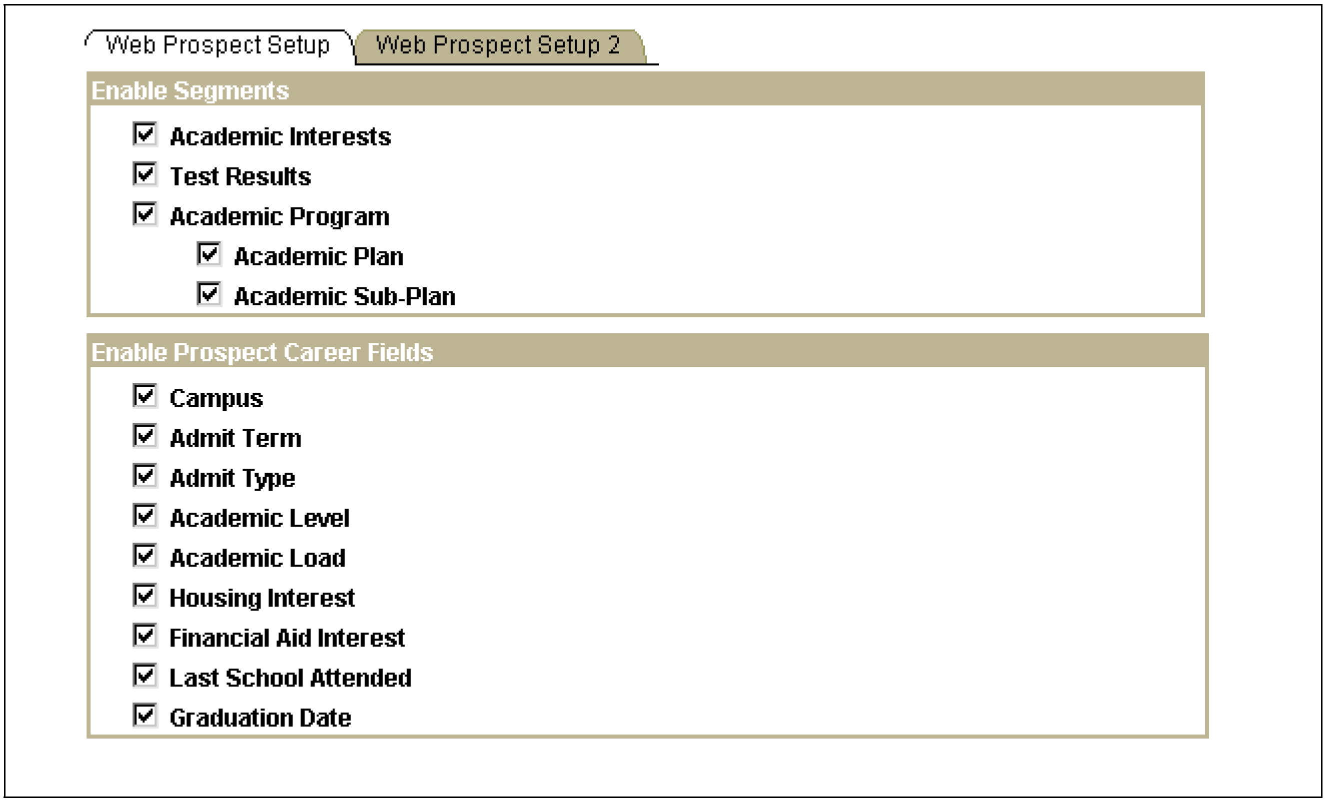
Use the Web Prospect Create Table component to determine which information segments you want to enable in the Request Information self-service transaction and to set up academic institution and career parameters (such as which careers you want available to the visitor, and which recruiting center you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

Pages Used to Set Up Self-Service Request Information

Page Name	Object Name	Navigation	Usage
Web Prospect Setup	ADM_WEB_PRS_TBL	Design Student Administration, Design Admissions, Setup, Web Prospect Create Table, Web Prospect Setup	Enable or disable Request Information self-service transaction segments and prospect career fields.
Web Prospect Setup 2	ADM_WEB_PRS2_TBL	Design Student Administration, Design Admissions, Setup, Web Prospect Create Table, Web Prospect Setup 2	Define institution and career setup parameters for the Request Information self-service transaction. The academic institutions and careers that you select on this page appear as choices on the Request Information detail page.

Enabling Segments and Prospect Career Fields

Access the Web Prospect Setup page.



Web Prospect Setup page

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

Enable Segments

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

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

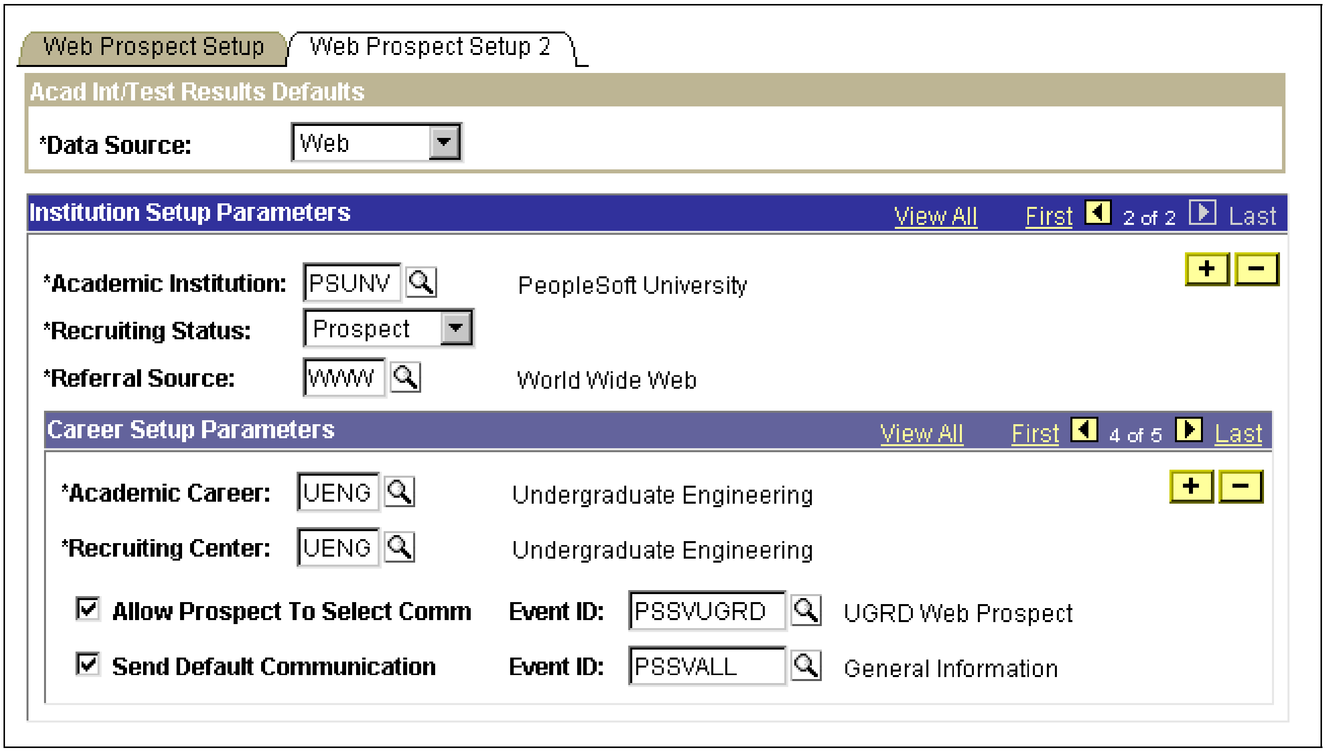
Enable Prospect Career Fields

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

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

Setting Up Institution and Career Parameters

Access the Web Prospect Setup 2 page.



Web Prospect Setup 2 page

Acad Int/Test Results Defaults

Data Source — *Web* is the default. You can change this value. The data source posts to the Academic Interests and Test Results pages.

Institution Setup Parameters

Academic Institution — Select the academic institution that you want available to the visitor. If you enter more than one academic institution, visitors can select the academic institution that they are interested in on the Request Information detail page. The system uses the academic institution that the visitor selects to create the prospect record. If you select only one academic institution, the system hides the Academic Institution field on the Request Information page. In this case, the system uses the one academic institution that you entered here to create the prospect record. You must enter at least one academic institution.

Recruiting Status — Select the recruiting status that you want the system to assign to the new prospect record. You can select a different recruiting status for each academic institution. The system assigns the selected recruiting status to new prospect records, based on information collected through the Request Information self-service transaction.

Referral Source Select the referral source for information collected through the Request Information self-service transaction. You can select a different referral source for each academic institution. The referral source that you enter here posts to the Prospect Career Data page.

Career Setup Parameters

Academic Career Select the academic careers that you want available for the visitor to select. On the Request Information detail page, visitors can select the academic careers that interest them. The system uses the selected academic career to create the prospect record. You must enter at least one academic career.

Recruiting Center Select the recruiting center that you want the system to assign to the new prospect record. You can select a different recruiting center for each academic career. The system assigns the selected recruiting center to new prospect records, based on information collected through the Request Information self-service transaction.

Allow Prospect to Select Comm (allow prospect to select communication) Select this check box to enable visitors to select from a list of available communications. If you select this check box, a group box that lists the communication items contained in the event ID that you select appears on the Request Information detail page. Visitors can select which items to receive. For example, the *UGRD Web Prospect* event ID at PSUNV includes communications containing information on financial aid, campus housing, and undergraduate applications. Visitors can choose one or more communications from this list. However, only those events that have the User Selection check box selected on the Event Definition Setup page appear as choices in the Event ID field, next to the Allow Prospect to Select Comm field.

Send Default Communication Select this check box to send a default communication to all visitors who request admissions information for this particular academic institution and career.

Event ID Select the event IDs that contain the communications that you want mailed to visitors (for each academic career). Enter an event ID in at least one of the Event ID fields. If both fields are blank, then a visitor could submit a Request Information request and receive a confirmation that the request went through, without receiving any communication. The event ID tells the system which communications to send to the visitor. Define event IDs on the Event page.

See *PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook*, “Managing Events Data,” Creating an Event.

CHAPTER 5

Setting Up External Test Data Loads

This chapter discusses how to:

- Define test components.
- Define tests.
- Review external data setup tables.

Note. You must complete these items before you can process external tests.

Defining External Test Components

Use the Test Component Table page to define the test components (such as verbal, math, analytical, and so on) of external academic tests (such as ACT, GMAT, GRE, and so on). You also use this table to create components of placement and other tests administered internally by your institution. If a component is used in more than one test, it only needs to be defined once. Note that totals are not computed by the system, so if you want to enter and track totals, be sure to define *Total* as one of your test components.

Page Used to Define External Test Components

Page Name	Object Name	Navigation	Usage
Test Component Table	SA_TEST_COMP_TABLE	• Design Student Administration, Design Admissions, Setup, Test Component Table, Test Component Table • Manage Student Records, Process Transfer Credit, Setup, Test Component Table, Test Component Table	Define the test components (such as verbal, math, analytical, and so on) of external academic tests (such as ACT, GMAT, GRE, and so on). Also, create components of placement and other tests administered internally by your institution. If a component is used in more than one test, it only needs to be defined once. Note that totals are not computed by the system, so if you want to enter and track totals, be sure to define *Total* as one of your test components.

Defining External Tests

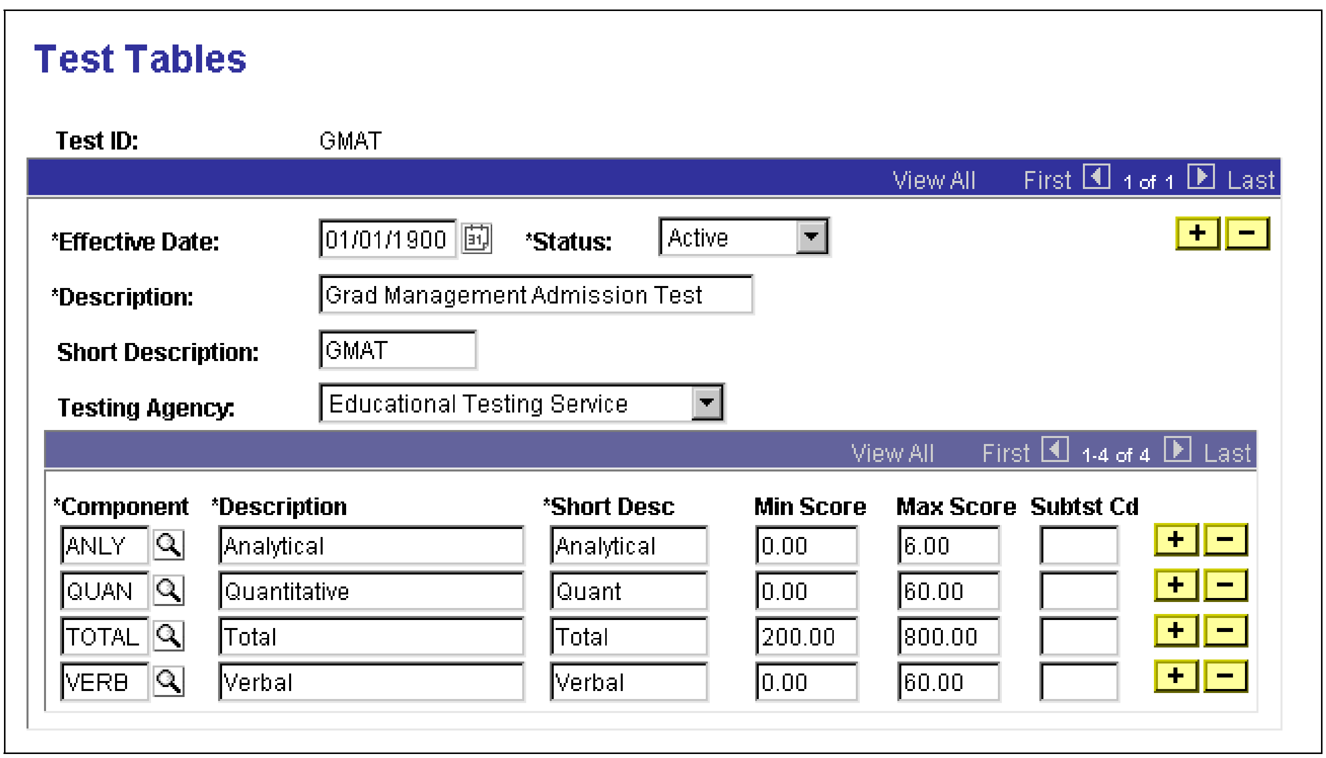
This section discusses how to define tests (such as ACT, GMAT, GRE, and so on) and how to associate test components with the appropriate tests.

Page Used to Defining External Tests

Page Name	Object Name	Navigation	Usage
Test Tables	SA_TEST_TABLE	• Design Student Administration, Design Admissions, Setup, Test Tables, Test Tables • Manage Student Records, Process Transfer Credit, Setup, Test Table, Test Tables	Define tests (such as ACT, GMAT, GRE, and so on) and associate test components with the appropriate tests. You can also associate tests on this page with a particular testing agency, such as American College Testing, College Board, Educational Testing Services and Law School Admission Services.

Defining External Tests

Access the Test Tables page.



Test Tables page

Testing Agency

Select the testing agency that administers this test (if applicable). This field is for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these translate values. The

	delivered values are *American College Testing, College Board, Educational Testing Services,* and *Law School Admission Services.*
Component	Select the test components that you want to link to this academic test. The system populates the descriptions based on the code that you select. Define test components on the Test Component Table page.
Min Score/Max Score (minimum score/maximum score)	Enter a test score range for each component.

Reviewing External Data Setup Tables

PeopleSoft Recruiting and Admissions delivers AP, GRE and SAT test codes, CRS major codes, MCAT credit hours, GPA codes, and SAT recentered values. These codes and values are used in external data processing.

You can edit the provided descriptions, but we recommend that the descriptions retain their original meaning to avoid confusion when viewing the loaded test data.

Pages Used to Review External Data Setup Tables

Page Name	Object Name	Navigation	Usage
AP Subject Test Codes	AP_SUBJECT_CODE	Develop Enrollment, Process External Data, Setup, AP Subject Test Codes	Review the delivered AP subject test codes or to add or edit a code. This table stores the test codes used on the AP test. You can link your own codes and descriptions to these codes so that the system displays your codes after the scores are posted. Use the AP Subject Test Code Parameters page to link your codes to the delivered codes.
ADA Country Table	ADA_COUNTRY_TBL	Develop Enrollment, Process External Data, Setup, ADA Country Codes, ADA Country Table	Define or review the AADAS country code. Before processing the ADA external search/test score data load, use the Country field to map AADAS country codes used on the ADA to PeopleSoft country codes.
CRS Major Codes	CRS_MJR_CD_TABLE	Develop Enrollment, Process External Data, Setup, CRS Major Codes, CRS Major Codes	Review the delivered CRS major codes or to add or edit a code.

Page Name	Object Name	Navigation	Usage
GRE Subject Test Codes	GRE_SUBJECT_CODE	Develop Enrollment, Process External Data, Setup, GRE Subject Test Codes, GRE Subject Test Codes	Review the delivered GRE subject test codes or to add or edit a code. You can link your own codes and descriptions to these so that the system displays your codes after the scores are posted. This linking is done later on the GRE Subject Test Code Parameters page.
AMCAS Credit Hours Codes	AMCAS_CR_HR_CODE	Develop Enrollment, Process External Data, Setup, AMCAS Credit Hours Codes, AMCAS Credit Hours Codes	Review the delivered AMCAS credit hours codes or to add or edit a code. An AMCAS file only includes the actual number of credit hours, so this table includes the codes and descriptions that are mapped to the AMCAS credit hour types.
AMCAS GPA Codes	AMCAS_GPA_CODE	Develop Enrollment, Process External Data, Setup, AMCAS GPA Codes, AMCAS GPA Codes	Review the delivered AMCAS GPA codes or to add or edit a code. An AMCAS file only includes the actual GPA, so this table includes the codes and descriptions that are mapped to the GPA.
SAT Math Recentered Values	SAT_MATH_RECENTER	Develop Enrollment, Process External Data, Setup, SAT Math Recentered Values, SAT Math Recentered Values	Review or edit the recentered SAT math score values. When you process SAT math scores, the system recenters some of the scores (as indicated by the SAT load) according to the values in this table. When the system recenters scores, only the recentered scores post to the person's record. The system displays the score it receives from the testing agency in the Math Score field. The translated score appears in the Recentered Math Score field. This is the score that the reported score is translated to.

Page Name	Object Name	Navigation	Usage
SAT Verbal Recentered Values	SAT_VERBAL_RECENTR	Develop Enrollment, Process External Data, Setup, SAT Verbal Recentered Values, SAT Verbal Recentered Values	Review or edit the recentered SAT verbal score values. When you process SAT verbal scores, the system recenters some of the scores according to the values in this table. When the system recenters scores, only the recentered scores post to the person's record. The system displays the score it receives from the testing agency in the Verbal Score field. The score displayed in the Recentered Verbal Score field is what the reported score is translated to when processed.
SAT II Test Codes	SATII_CODE	Develop Enrollment, Process External Data, Setup, SAT II Test Codes, SAT II Test Codes	Review the delivered SAT II test codes or to add or edit a code. You can link your own codes and descriptions to the codes you received in an SAT II tape or file so that your codes are displayed on your Admissions pages.
SAT II Test Recentered Values	SATII_TST_RECENTER	Develop Enrollment, Process External Data, Setup, SAT II Test Recentered Values, SAT II Test Recentered Values	Review or edit the recentered test score values for each SAT II test code. When you process SAT II scores, the system recenters the scores according to the values in this table. Only the recentered scores post to the person's record. The left column lists the SAT II test scores received from the testing agency. The right column lists the recentered test scores, which are what the reported score is translated to when processed.

CHAPTER 6

Setting Up to Receive OUAC Transactions

This chapter discusses how to:

- Set up EDI Manager for OUAC transactions.
- Set up OUAC law categories.
- Set up teaching subjects.
- Set up OUAC organizations.

Setting Up EDI Manager for OUAC Transactions

EDI is a means of transmitting data electronically from one entity to another. Through the EDI Manager you can receive data files from external sources and load important recruiting and admissions data into staging tables where you can review and edit the data. Then you can post the data to tables in your database.

Before you begin processing external OUAC transactions, you must set up conversion parameters in the EDI Manager. This enables the EDI Manager to recognize OUAC elements (such as OUAC element number 400—expected enrollment date) and to map data from OUAC elements to PeopleSoft objects (such as the field ADMIT_TERM in the table ADM_APPL_PROG).

To map OUAC elements to PeopleSoft objects, you must first define a conversion type definition for the destination objects in your database (such as ADMIT_TERM). Use the Conversion Type Definition page to define conversion type definitions. Then you must define conversion data profiles that relate internal values to external values. Use the Conversion Data Profile page to define conversion data profiles. Lastly, define an inbound map definition that links the OUAC element to the PeopleSoft object. Use the Business Document Layout page to map OUAC elements to PeopleSoft objects. EDI Manager pages are discussed in more detail in your PeopleTools documentation.

The elements that are school specific are:

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
010 –	OUAC_LAW_A	OUAC_CTL_WD	INSTITUTION
	OUAC_LAW_U	OUAC_CTL_WD	INSTITUTION
	OUAC_PT	OUAC_CTL_WD	INSTITUTION
	OUAC_TEA_A	OUAC_CTL_WD	INSTITUTION
	OUAC_TEA_U	OUAC_CTL_WD	INSTITUTION
	OUAC_UAS_A	OUAC_CTL_WD	INSTITUTION
	OUAC_UAS_U	OUAC_CTL_WD	INSTITUTION
395 – University/Program Desired	OUAC_UAS_A	OUAC_A5_U5_WD	ACAD_PROG
	OUAC_UAS_U	OUAC_A5_U5_WD	ACAD_PROG
	OUAC_UAS_U	OUAC_D1_WD	ACAD_PROG
	OUAC_PT	OUAC_A5_U5_WD	ACAD_PROG
400 – Expected Enrollment Date	OUAC_UAS_A	OUAC_A5_U5_WD	ADMIT_TERM
	OUAC_UAS_U	OUAC_A5_U5_WD	ADMIT_TERM
	OUAC_UAS_U	OUAC_D1_WD	ADMIT_TERM
	OUAC_PT	OUAC_A5_U5_WD	ADMIT_TERM
410 – Full or Part-time	OUAC_UAS_A	OUAC_A5_U5_WD	ACAD_LOAD_APPR
	OUAC_UAS_U	OUAC_A5_U5_WD	ACAD_LOAD_APPR
	OUAC_PT	OUAC_A5_U5_WD	ACAD_LOAD_APPR
411 – Year Desired	OUAC_UAS_A	OUAC_A5_U5_WD	ACADEMIC_LEVEL
	OUAC_UAS_U	OUAC_A5_U5_WD	ACADEMIC_LEVEL
	OUAC_PT	OUAC_A5_U5_WD	ACADEMIC_LEVEL
440 – Residence Information Requested	OUAC_UAS_A	OUAC_A5_U5_WD	HOUSING_INTEREST
	OUAC_UAS_U	OUAC_A5_U5_WD	HOUSING_INTEREST
	OUAC_PT	OUAC_A5_U5_WD	HOUSING_INTEREST
600 – Final or Interim	OUAC_UAS_A	OUAC_M2_WD	TRNSCRPT_STATUS
	OUAC_UAS_U	OUAC_M2_WD	TRNSCRPT_STATUS

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
755 – Last Session of Study at CEGEP	OUAC_UAS_A OUAC_UAS_U	OUAC_C1_WD OUAC_C1_WD	EXT_TERM EXT_TERM
765 – Session CEGEP Course Taken	OUAC_UAS_A OUAC_UAS_U	OUAC_C2_WD OUAC_C2_WD	EXT_TERM EXT_TERM
531 – Year Level	OUAC_PT OUAC_TEA_A OUAC_TEA_U OUAC_UAS_A OUAC_UAS_U	OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD	EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL
533 – Diploma Received	OUAC_LAW_A OUAC_LAW_U OUAC_PT OUAC_TEA_A OUAC_TEA_U OUAC_UAS_A OUAC_UAS_U	OUAC_G2_H2_WD OUAC_G2_H2_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD	OUAC_DIPLOMA_ CODE OUAC_DIPLOMA_ CODE OUAC_DIPLOMA_ CODE OUAC_DIPLOMA_ CODE OUAC_DIPLOMA_ CODE OUAC_DIPLOMA_ CODE OUAC_DIPLOMA_ CODE
665 - University/Program Desired	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ACAD_PROG ACAD_PROG
670 – Enrollment 1 Offered	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ADMIT_TERM ADMIT_TERM
840 – University/Program Code	OUAC_TEA_A OUAC_TEA_U OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD OUAC_D1_WD	ACAD_PROG ACAD_PROG ACAD_PROG

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
860 - Residence Information Requested	OUAC_TEA_A OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD	HOUSING_INTEREST HOUSING_INTEREST
685 – Year Level Offered	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ACADEMIC_LEVEL ACADEMIC_LEVEL
1400 – Course Level	OUAC_UAS_A OUAC_UAS_U OUAC_UAS_A OUAC_UAS_U	OUAC_F2_WD OUAC_F2_WD OUAC_F3_WD OUAC_F3_WD	COURSE_LEVEL COURSE_LEVEL COURSE_LEVEL COURSE_LEVEL
825 – Degree Code	OUAC_TEA_A OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD	OUAC_DIPLOMA_CODE OUAC_DIPLOMA_CODE

The translates PeopleSoft maintains as TP Coverts are:

OUAC ELEMENT	Transactions	TP Convert Name
170 – Country of Current Citizenship	A4	OUAC_CNTRY
180 – Citizenship, Appendix 9.A.30	A4	OUAC_CNTRY
190 – Country of Residence, Appendix 9.A.30	A4	OUAC_CNTRY
200 – Province of Residence	A4	OUAC_PROV
220 – Immigration Status	A4	CitznStat
230 – Gender	A4	Sex
250 – Marital Status	A4	MAR_STATUS
270 – First Language	A4	Accmpl-Lng

OUAC ELEMENT	Transactions	TP Convert Name
542 – Country where attended English School	A5	OUAC_CNTRY
573 – Response to OSAP Question	A5	OUAC_Y/N
2174 – LSAT Misconduct Flag	J1	OUAC_Y/N
1080 – Country of Birth	A5	OUAC_CNTRY
280 – Language of Correspondence	A4	Accmpl-Lng
450 – Language of Instruction	A5	Language
581 – Language of Instruction	M2	Language
865 – Language of Instruction	A8	Language
430 – Previous Yr Applied to this Inst	A5	Prior_Appl
114 – Mailing Address Country	B7	OUAC_FCTRY
154 – Home Address Country	B8	OUAC_FCTRY
560 – Achievement of OSSD	M1	Degr_Stat
2168 – Plan to Write LSAT Future	J1	OUAC_Y/N
2106 – Emergency Contact Country	B9	OUAC_FCTRY

The translates PeopleSoft maintain as translate tables are:

OUAC ELEMENT	Transactions	Field Name
2201 – LSAT Details irreg code	J2, J3, J4	OUAC_LSAT_IRREG1 OUAC_LSAT_IRREG2 OUAC_LSAT_IRREG3 OUAC_LSAT_IRREG4
477 – Attended Postsecondary	A5	OUAC_ATTND_PSTSCND
475 – Authorization to Release Academic	A5	OUAC_AUTH_RELEASE
397 – Cooperative Education	A5, D1	COOP_REQ
507 – Authorization to Release Univ Performance to Sec School	A9	OUAC_AUTH_RELEASE
930 – Previously Dealt w/ University	B1	OUAC_PRV_WITH_UNIV
2020 – Ever Attended Law School	B1	OUAC_ATTEND_LAW
2145 – Fee Waiver Received	G8	OUAC_WAIVER_RCVD (check box)
2151 – All OLSAS Applications	G8	OLSAS_OSGOODE_STAT OLSAS_OTTAWA_STAT OLSAS_QUEENS_STAT OLSAS_TORONTO_STAT OLSAS_WESTERN_STAT OLSAS_WINDSOR_STAT
2095 – Authorization	G3	OUAC_EMR_CNTCT_AUT
295 – Mature Student Regulation	A4	OUAC_MATURE_STDNT
935 – Second Degree	B1	OUAC_SECOND_DEGREE

OUAC ELEMENT	Transactions	Field Name
2173 – Ethnic Code	J1	ETHNICITY_LSAC
2286 - Type	R2	OUAC_DEGREE_TYPE

The translates PeopleSoft maintain in tables are:

OUAC ELEMENT	Table Name
532 – Program of Study, Appendix 9.A.65	EXT_SUBJECT_TBL
332 – Subject of Major Interest, Appendix 9.A.80	EXT_SUBJECT_TBL
845 – Teaching Subject 1, Appendix 9.A.85 850 – Teaching Subject 2, Appendix 9.A.85	OUAC_T_SUBJECT_TBL
750 – Program Code Last Studied, Appendix 9.A.25	CEGEP_PROG_TBL
525 – Advanced Standing Program, Appendix 9.A.95	OUAC_PROG_TBL
2111 – Category, Appendix 9.A.50	OUAC_LAW_CAT_TB

See Also

PeopleSoft Supported Integrated Technologies

Setting Up OUAC Law Categories

This section discusses how to set up OAUC law categories.

Page Used to Set Up OUAC Law Categories

Page Name	Object Name	Navigation	Usage
OAUC Law Categories	OUAC_LAW_CAT_TBL	Design Student Administration, Design Admissions, Setup, OUAC Law Categories, OUAC Law Categories	Define OUAC law categories. Law categories are used on the OUAC Appl Law Cat (OUAC application law category) page.

Setting Up Teaching Subjects

This section discusses how to set up teaching subjects.

Page Used to Set Up Teaching Subjects

Page Name	Object Name	Navigation	Usage
OUAC Teaching Subject Table	OUAC_T_SUBJECT_TBL	Design Student Administration, Design Admissions, Setup, OUAC Teaching Subjects, OUAC Teaching Subject Table	Define OUAC teaching subjects. Teaching subjects are used on the OUAC A8/U8 page.

Setting Up OUAC Organizations

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

To set up OUAC organizations:

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

Page Used to Set Up OUAC Organizations

Page Name	Object Name	Navigation	Usage
OUAC Organization Data	EXT_ORG_TABLE_OUAC	Build Community, Organization Data, Use, Organization Table OUAC, Ouac Organization Data	Enter the Ministry of Education code, the OUAC institution code, and the current enrollment levels for the new organization.
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	Enter or update an organization.
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 person that your institution should contact for an organization.

Page Name	Object Name	Navigation	Usage
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 the organizations that offer courses.
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	Identify details that are important to your institution in affiliation with an organization.
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	Record the specific course offerings for each subject area.
Comment Category Table	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	Set up comment categories that enable you to group comments for similar purposes.

Adding OUAC Organizations

Access the Organization Table page.

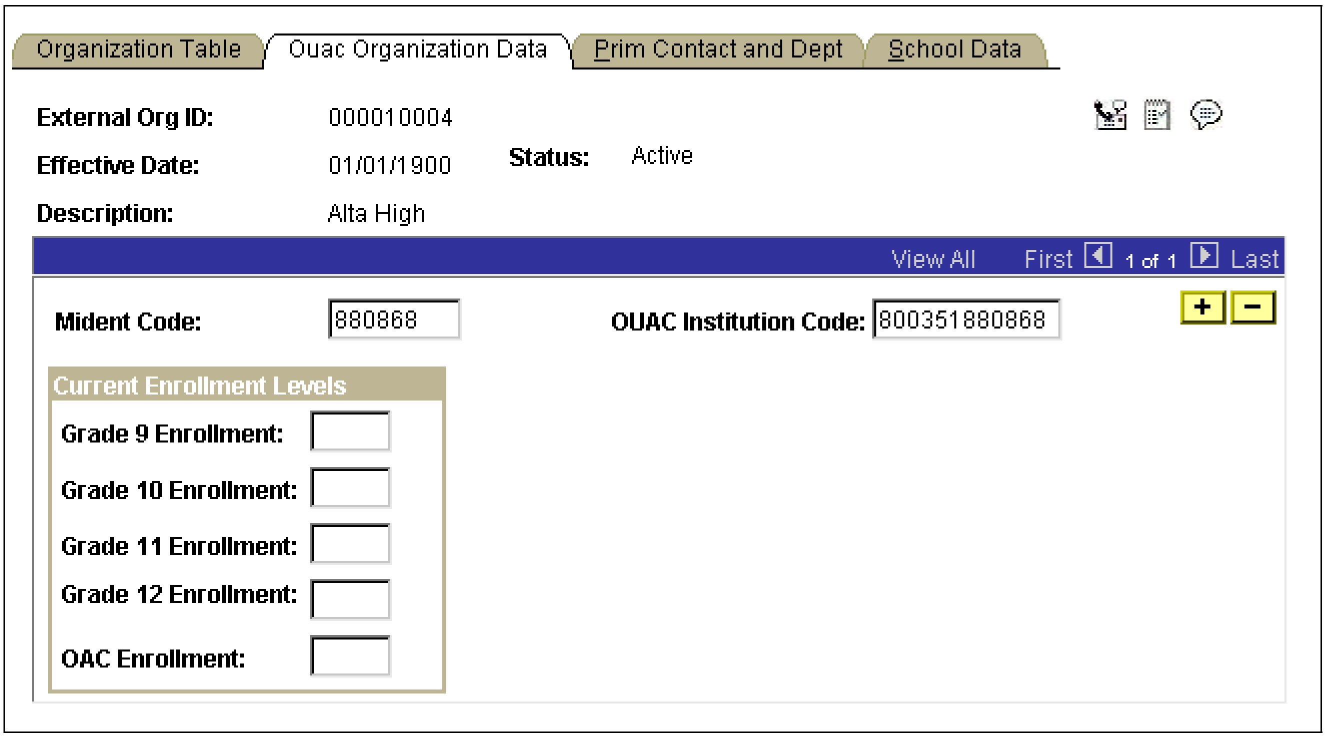
Use the Organization Table page to add OUAC organizations. You can enter definitions for the organization, elect an organization type and a location.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Adding Organizations to Your Database"

Entering OUAC Organization Data

Access the OUAC Organization Data page.



OUAC Organization Data

Mident Code Enter the Ontario Ministry of Education six digit school code.

OUAC Institution Code Enter the code that identifies OUAC institutions—when you post OUAC data the process looks for this code to populate the EXT_ORG_ID field.

Grade 9 (through 12) Enrollment Enter the current enrollment levels for the respective grades.

OAC Enrollment Enter the total OUAC enrollment.

Specifying a Primary Contact and Department for an OUAC Organization

Access the Primary Contact and Department page.

Use the Primary Contact and Department page to specify an organization's primary contact person or the department to contact, to help streamline your institution's communication with that organization.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Adding Organizations to Your Database"

Entering School Data

Access the School Data page.

Use the School Data page to enter school characteristics, school codes, and system default values.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Adding Organizations to Your Database," Entering School Related Data

Assigning GPA Types to OUAC Organizations

Access the Organization Affiliation page.

GPA type must have a value entered to populate a grading scheme on the External Courses page when OUAC transmissions are processed. This is important because grading scheme is a required field on external courses and if it is not populated the user can not make any changes to that page without getting an error message. Use the Organization Affiliation page to define a GPA type for an organization.

See Also

PeopleSoft Campus Community Fundamentals PeopleBook, "Maintaining Organization Data," Entering Affiliations with Organizations

Defining School Course Classifications for OUAC

Access the School Course Classification page.

Use the School Course Classification page to define school course classifications for OUAC organizations. The values you enter on this page populate fields on the External Courses page when you post OUAC transmissions.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Setting Up Organization Data," Setting Up External Subjects, Terms, and Courses

Defining the SECSCH Comment Category

Secondary school comments on the A9 transaction appear on the Comments pages. To view them, you must first set up the comment category "SECSCH". You must also tie it to at least one 3C group. Use the Comment Category Table page to define the SECSCH comment category. Use the Comment 3C Groups page to tie the SECSCH comment category to a 3C group.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Comments,” Setting Up Comment 3C Group Security

CHAPTER 7

Setting Up for Evaluating Applicants

This chapter lists prerequisites and discusses how to set up for evaluating applicants.

Prerequisites

Before you begin performing applicant evaluations, you must set up the following:

- Rating components.
- Rating schemes.
- Evaluation codes.
- Evaluation status codes.
- Evaluation committees.

Pages Used to Set up Applicant Evaluation

Page Name	Object Name	Navigation	Usage
Rating Comp Def Table (rating component definition table)	RATING_COMP_DEF	Design Student Administration, Design Admissions, Setup, Rating Comp Definition Table, Rating Comp Def Table	Define rating components. Rating components are specific criteria that you use to rate applicants. For example, you could have components such as extracurricular activities, academic preparation, highest SAT, and so on. You use rating components to define rating schemes.
Rating Scheme Table	RATING_SCHEM_TABLE	• Design Student Administration, Design Admissions, Setup, Rating Tables, Rating Scheme Table • Develop Enrollment, Evaluate Applicants, Setup, Rating Tables, Rating Scheme Table	Define rating schemes. The admissions evaluation process uses rating schemes to evaluate applicants. For example, you could have one rating scheme for undergraduate applicants and another for undergraduate engineering applicants. Rating schemes can be defined for manual and automatic evaluations.

Page Name	Object Name	Navigation	Usage
Materials Extract Detail	RATING_SCHEME_SP	Click the Extracts button on the Rating Scheme Table page.	Enter the SQCs for your material extracts.
Rating Components Table	RATING_CMP_TABLE	• Design Student Administration, Design Admissions, Setup, Rating Tables, Rating Components Table • Develop Enrollment, Evaluate Applicants, Setup, Rating Tables, Rating Components Table	Select the rating components that make up your rating scheme. For example, an undergraduate first year rating scheme could consist of components such as overall rating, academic preparation, highest ACT score, highest SAT score, and subjective committee rating. Later, you can assign scores to each component, which can be averaged for an overall score for the rating scheme.
Evaluation Table	EVALUATION_TABLE	Design Student Administration, Design Admissions, Setup, Evaluation Tables, Evaluation Table	Define evaluation codes and the rating schemes linked to them. You must assign evaluation codes—either manually or automatically—to evaluations during the evaluation process. Evaluation codes contain default information that populates fields (such as rating scheme) in the General Evaluation and Application Evaluation components on evaluation pages when you assign an evaluation code to an applicant. Thus, evaluation codes act as templates, making data entry much speedier when creating evaluation records.
Evaluation Committee Table	EVAL_COMMITTEE	• Design Student Administration, Design Admissions, Setup, Evaluation Tables, Evaluation Committee Table • Develop Enrollment, Evaluate Applicants, Setup, Evaluation Tables, Evaluation Committee Table	Assign evaluation committees to your evaluation codes (if applicable).

Page Name	Object Name	Navigation	Usage
Evaluation Status Table	EVAL_STATUS_TABLE	• Design Student Administration, Design Admissions, Setup, Evaluation Status Table, Evaluation Status Table • Develop Enrollment, Evaluate Applicants, Setup, Evaluation Status Table, Evaluation Status Table	Define evaluation status codes. For example, you can set up statuses such as Final, On Hold, and In Progress. Later, when evaluating applicants, you will enter these statuses on evaluation pages as well as on the Application Program Data page under the Application Maintenance menu.

Defining Rating Schemes

Access the Rating Scheme Table page.

Rating Type

Select a rating type for this scheme. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Application, Audition, Committee, Interview, Overall,* and *Portfolio.*

Note. If you plan to evaluate applicants using automated processes, you must define a rating scheme with an *Overall* rating type.

Instructions

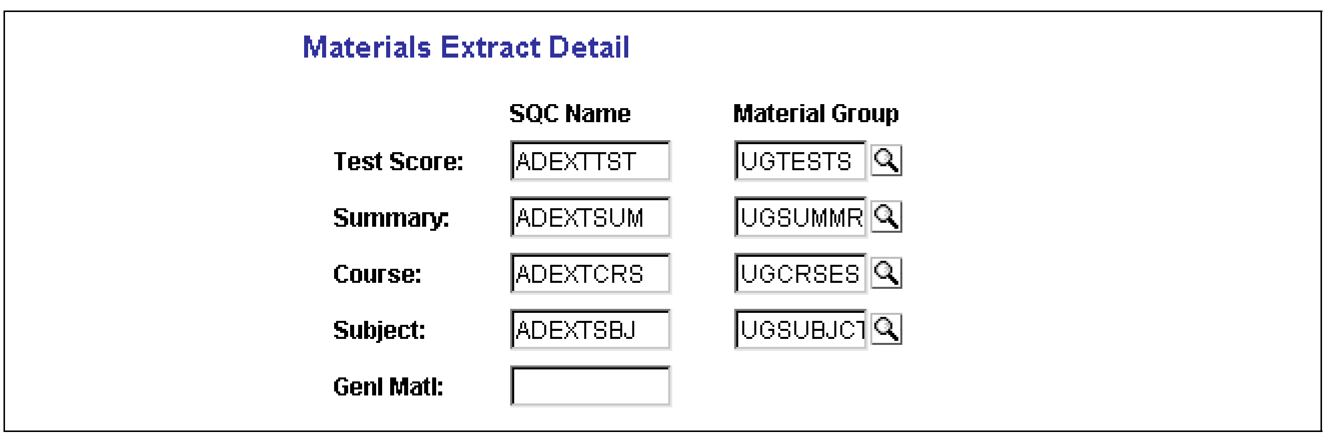
Enter any pertinent information regarding this rating scheme.

Extracts

Click this button to enter the SQCs for your material extracts. The Material Extract Detail Page for this rating scheme appears.

Using the Material Extract Detail Page

Access the Materials Extract Detail page.



Materials Extract Detail page

Test scores, academic summaries, course/subject information, and general materials are linked to a *person.* When you evaluate applicants, you might only want to consider certain materials for a particular evaluation, rather than considering all materials for the person. Within PeopleSoft Recruiting and Admissions you can manually associate the appropriate application materials to an application (on the Application Materials page), or you can associate application materials to applications using the Application Materials Extract process. To associate materials to an application using the application materials extract process, you use SQCs to define which information to extract and use in your evaluation process. Use the Materials Extract Detail page to enter the name of the SQCs that extract appropriate material information (at the person level) for evaluating applicants.

Enter the SQCs that you want to be executed by the SQR that your institution has defined to retrieve test scores, summaries, courses, subjects and general materials. PeopleSoft delivers the example SQCs shown on the previous page shot.

Note. A sample SQR, ADMTLEXT.SQR, is provided with your system on which you can base your SQR.

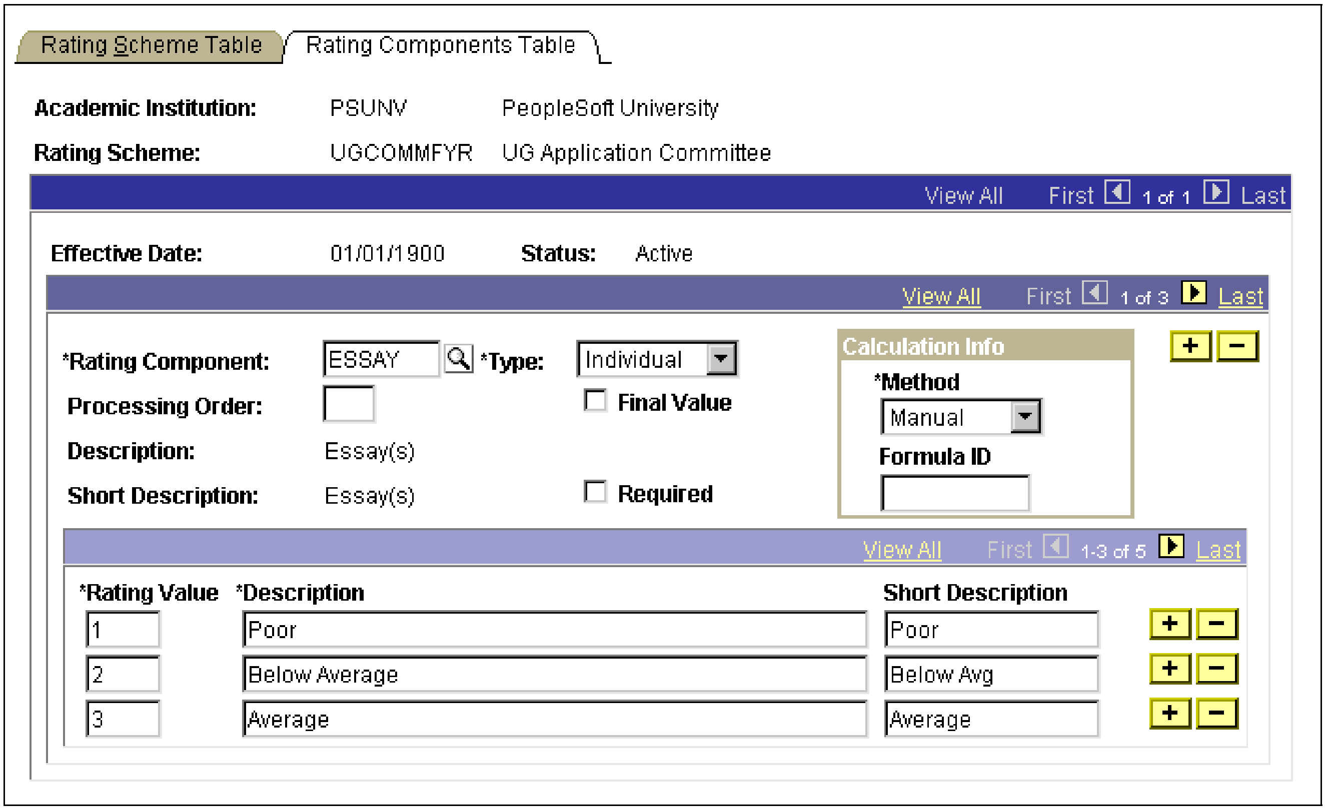
For each SQC, except general materials, select the appropriate material group from which you will extract data. Material groups are made up of material types. The information you extract can later be viewed on the Application Materials Summary pages.

See Chapter 2, “Building Your Recruiting Structure,” page 5.

Note. You can use the extract process to associate transcript information to an application. To associate transcript information to an application, use the Materials Extract Detail page to enter the SQC name for summary information, which contains the transcript information. Or, you can manually associate transcript information to an application on the Application Materials for Applicants page.

Assigning Components to Rating Schemes

Access the Rating Components Table page.



Rating Components Table page

Rating Component

Select a rating component for this rating scheme. Rating components are specific criteria that you use to rate applicants. When you're ready to evaluate applicants, you can assign scores to each rating component (if you are evaluating the applicant manually), which can be averaged for an overall score for the rating scheme. Assign rating components on the Rating Component Definition Table page.

Type

Identify the type of rating component that you selected. This identifies the rating component as an individual component (such as Essay), or one that is made up of other components (such as Overall). Component types are useful for informational and reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Cumulative* and *Individual.*

Processing Order

Enter the order in which this component should be processed within the group of components assigned to this rating scheme.

Final Value

Select this check box if this component is one on which you base admissions decisions. The application status update process that posts results of an evaluation to the application looks to see if all components with this check box selected have been fulfilled before posting a result. You can have only one component selected as final value (such as overall rating), if that component is the only component that needs to be fulfilled before evaluating the applicant. You can also have more than one component selected as final value (such as overall, highest GPA, and highest test score), if you require all of these components to be fulfilled before evaluating the applicant.

Required

Select this check box if this component *must* be considered for this rating scheme. For example, suppose you have a rating scheme that requires the testing component, which looks for a person's highest ACT or highest SAT score. Suppose further that within this rating scheme you also have separate components for SAT and ACT, but they are *not* marked required. If a component is not marked as required, your rating scheme process knows to continue to the next component if this component does not exist for this applicant. If a component is marked required, the process will not continue if the component is missing. So in our example, there would have to be an ACT*or* SAT score, but not both, since only the testing component is required.

Method

Select the calculation method for this component. Component rating values can be calculated automatically, in which case the Assign Adm Applicant Rating (assign admissions applicant rating) process calculates the rating value for you. Or you can calculate the value manually, which means you will enter a score yourself. For example, you would most likely want to calculate an objective rating component (such as overall rating) automatically. Thus, the process would look at various data to come up with the overall rating score for an applicant. On the other hand, you would probably want to enter subjective scores (such as for the recommendations rating component) manually.

Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Automatic* or *Manual.*

Formula ID

If you selected *Automatic* in the Method field, enter a formula ID. Formula IDs are the names of the SQCs that provide the programming logic for components. These are the programs that retrieve the data for the evaluation calculation.

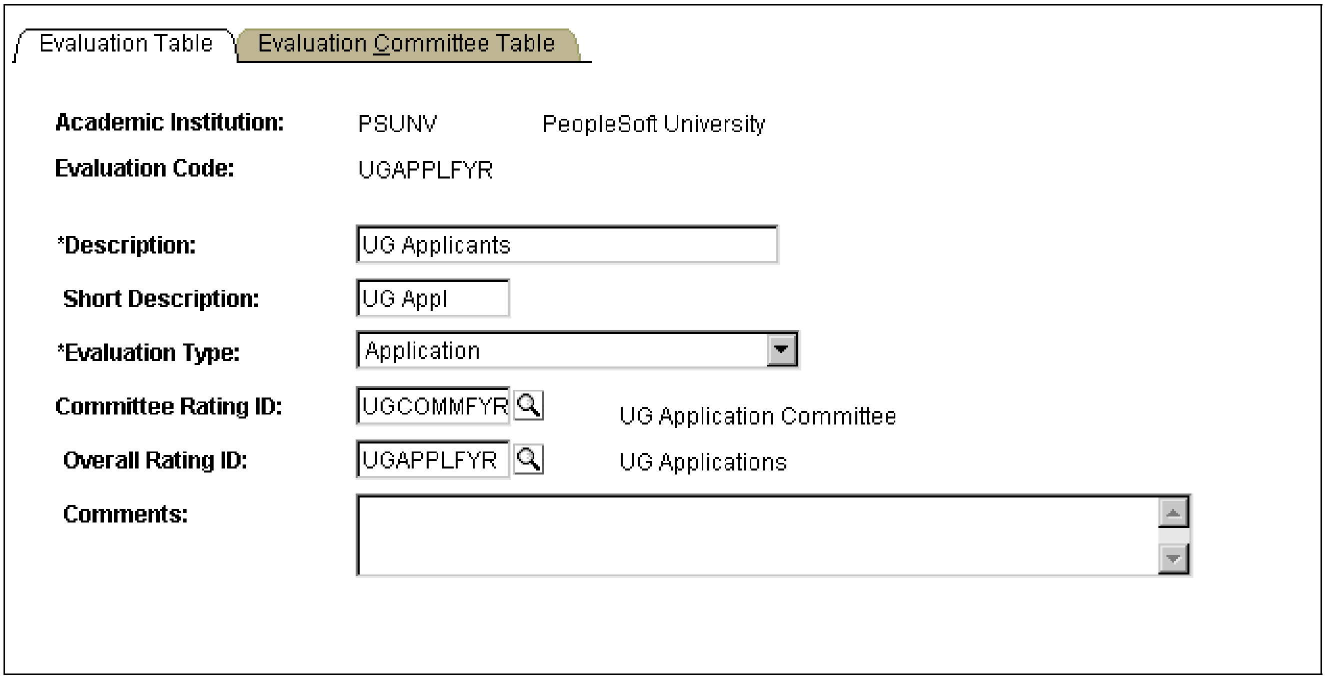
Rating Value

Enter a numeric rating value if the component is calculated manually. For example, suppose you wanted the essay component to be used as part of a committee evaluation. You could assign rating values (such as poor, average, and so forth) to the essay component, as on the previous page example. Then, when evaluators enter evaluations for these components (on the General Evaluator Detail page or the Application Evaluator Detail page), they can prompt for these rating values.

Note. The rating values you enter here are not retrieved through the Application Evaluation process, as are objective values such as test scores and GPA. Individual evaluators will use the rating values you enter here when they rate subjective materials (such as essays).

Defining Evaluation Codes

Access the Evaluation Table page.



Evaluation Table page

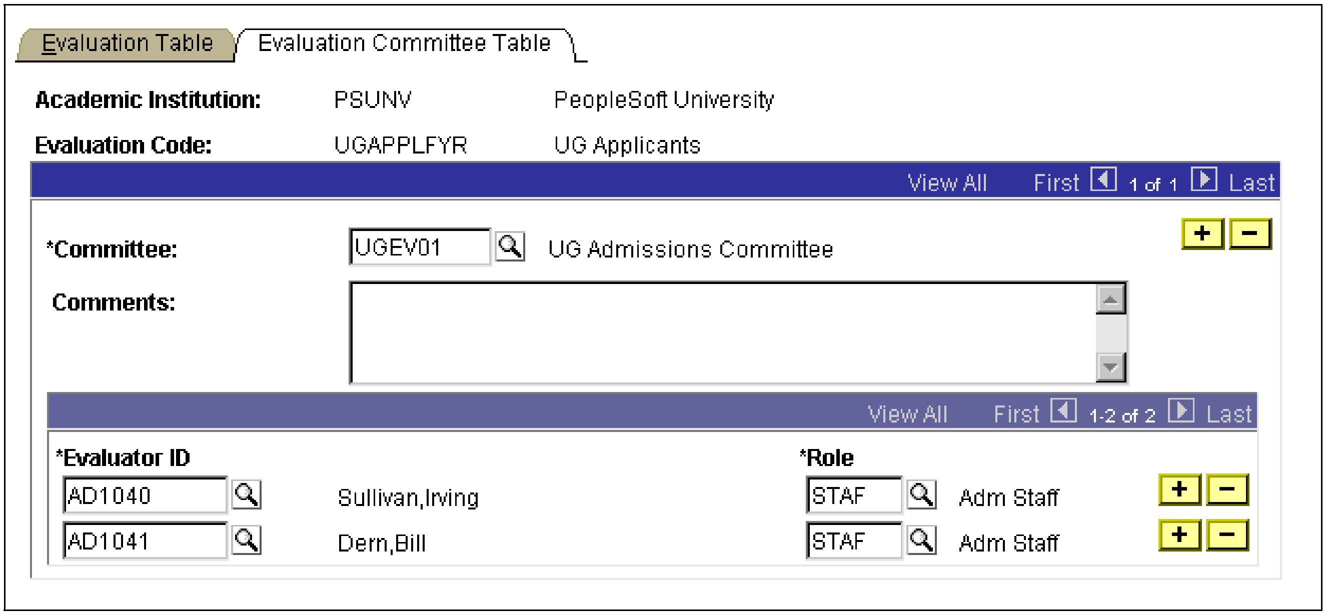
Evaluation Type Select an evaluation type for this evaluation code. You can define evaluation codes that can be used for evaluating applicants *(Application),* or you can define evaluation codes that can be used for evaluating individuals *(General).* In the latter case, the evaluation code will be assigned to a person, rather than an application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Application* and *General.*

Committee Rating ID If committees perform this evaluation, select the rating scheme that the committee will use with this evaluation code. You assign actual committees to this evaluation code on the next page in this component. Define rating schemes on the Rating Scheme Table page.

Overall Rating ID Assign an overall rating scheme if you use this rating code for overall evaluations.

Defining Evaluation Committees for Admission Applications

Access the Evaluation Committee Table page.



Evaluation Committee Table page

Committee Select a committee to be assigned to this evaluation code. You can add more than one committee for an evaluation code. Define committees and committee members on the Committee page in PeopleSoft Campus Community.

Evaluator ID Enter the evaluators who sit on this committee. All members of this committee automatically appear as evaluators, along with their role on the committee. You can add evaluators who are not already assigned to this committee.

Role Select evaluator roles for the evaluators that you add. Roles for committee members appear from the Committee Members page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Committee Data”

Defining Evaluation Status Codes

Access the Evaluation Status Table page.

Evaluation in Progress Select this check box if the evaluation status that you’re defining is defined as in progress (such as *In Progress,* and as opposed to *Final).* Applicant evaluation processes only process applications whose current evaluation status is one that has this check box selected.

CHAPTER 8

Setting Up for Admissions Program Actions and Statuses

This chapter discusses how to set up for admissions program actions and statuses.

Setting Up for Admissions Program Actions and Statuses

This section discusses how to:

- Review admissions program action values that are delivered with your system.
- Define admissions program action reason values.

Pages Used to Set Up for Admissions Program Actions and Statuses

Page Name	Object Name	Navigation	Usage
Admissions Action Table	ADM_ACTION_TABLE	Design Student Administration, Design Admissions, Setup, Admissions Action Table, Admissions Action Table	View admissions program actions.
Program Action Table	PROG_ACTION_TABLE	• Design Student Administration, Define Student Administration, Setup, Program Action Table, Program Action Table • Manage Student Records, Track Student Careers, Setup, Program Action Table, Program Action Table	Modify program action codes. Program action codes designate the status of a student in a program from the time he or she is an applicant and throughout his or her academic career. For example, a student must have a program action of *Matriculate* to become a student, and a program action of *Activate* in any term in which she wants to enroll. You can change the effective date and status for the program action codes that PeopleSoft provides. By changing the effective date and status you can render a program action code inactive so that it is longer available to your users.
Program Action Reason Table	PROG_RSN_TBL	• Design Student Administration, Define Student Administration, Setup, Program Action Reason Table, Program Action Reason Table • Design Student Administration, Design Admissions, Setup, Program Action Reason Table, Program Action Reason Table • Manage Student Records, Track Student Careers, Setup, Program Action Reason Table, Program Action Reason Table	Define program action reasons. You can define multiple reasons for one action. For example, for the action *Administrative Withdrawal,* you can define a reason of *Incomplete Application* as well as a reason of *No Response.* These reasons enable flexibility with the program action codes delivered with your system.

Reviewing Admissions Program Action Values

Access the Admissions Action Table page.

Program actions are shared with PeopleSoft Student Records. The only values you'll see in this page, however, are those that are specific to admissions. Similarly, when you prompt for a program action on PeopleSoft Recruiting and Admissions pages, you will only see a list of those values relevant to admissions.

Values for this table are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. For your convenience, you can view the admissions specific program actions in this table without having to go to the translate table.

Defining Admissions Program Action Reason Values

Access the Program Action Reason Table page.

This table is shared with PeopleSoft Student Records and reasons are also defined here for Student Record-specific program actions.

Important! If you want the system to update a person's personal data record with his or her date of death upon taking an admissions program action of *Deny, Applicant Withdrawal, Administrative Withdrawal,* or *Admission Revocation* because of death, you must define an action reason code of *DEAT*. *DEAT* must be the action reason defined for the program actions listed in order for the system to populate the Date of Death field on the Decedent Data page.

CHAPTER 9

Recruiting Prospective Students

This chapter lists prerequisites and discusses how to:

- Add prospects to your system.
- View prospect information.
- Assign regions, recruiting categories, and recruiters on a mass basis.
- Use outreach for recruiting and admissions.

Prerequisites

Before you enter prospects into the system, set up your recruiting structure. Your recruiting structure consists of recruiting regions and recruiters. You must also define honors, awards, school types, admit types, extracurricular activities, and so on, before you can assign them to prospects.

See Chapter 2, “Building Your Recruiting Structure,” page 5.

Before you add prospects, search the database to see if a biographic and demographic record already exists for the person. The person might already be in your database as an employee, instructor, or student in another academic institution or career. To see if the prospect exists in your system, select Develop Enrollment, Recruit Prospective Students, Inquire, Search Match.

See *PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook*, “Setting Up Search/Match Criteria”.

If the person already exists in your database, see if there is a prospect record for the academic institution and career for which you want to create a prospect record.

Adding Prospects

You are ready to add a prospect if you determine that the person does not already have a prospect record in the academic institution and career for which you are entering that person.

The Prospect Data component is the first of three similar components:

- Prospect Data component.
- Application Entry component.
- Application Maintenance component.

All three components have a Bio/Demo page, an Addresses page, and other pages with similar names such as Prospect Academic Program Data page and Application Program Data page. Use these components to enter or maintain similar information at different times in the admissions process: for prospects (discussed in this section), for entering application data, and for maintaining application data.

The following 3C buttons are common to multiple pages within this component and are defined in the preface of this PeopleBook: Add a New Communication, Add a New Checklist, and Add a New Comment.

Note. The system automatically populates many of the values in this component according to your user defaults. These fields are indicated in the documentation by the phrase *(user defaults).*

This section discusses how to enter and update the following information for prospects:

- Bio/demo data.
- Addresses.
- Academic career data.
- Academic program data.
- School and recruiting data.
- Event attendance.
- Event meeting information.

Pages Used to Add Prospects

Page Name	Object Name	Navigation	Usage
Prospect Career Data	ADM_PRSPCT_CAR	Develop Enrollment, Recruit Prospective Students, Use, Prospect Data, Prospect Career Data	Enter pertinent prospect career data.
Prospect Program Data	ADM_PRSPCT_PROG	Develop Enrollment, Recruit Prospective Students, Use, Prospect Data, Prospect Program Data	Enter information about programs, plans, or subplans in which a prospect has expressed interest.
Prospect School/Recruiting	ADM_PRSPCT_RECRUIT	Develop Enrollment, Recruit Prospective Students, Use, Prospect Data, Prospect School/Recruiting	Enter recruiting information for a prospect. This page stores information such as the last school that a prospect attended and the recruiting region to which this prospect belongs.
Attendee Events	EVENT_ATTENDEE_SEC	Click the Events link on the Prospect School/Recruiting page.	Register a prospect for events or to record events that the prospect attended.
Attendee Meetings	EVENT_MEETING_SEC	Click the Meetings button on the Attendee Events page to open the Attendee Meetings page.	Record information regarding meetings associated with an event.

Entering and Updating Prospect Bio/Demographic Data

Use the Bio/Demo Data (biographic and demographic data) page to enter or update any personal or demographic information for the prospect.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Entering and Updating Prospect Addresses

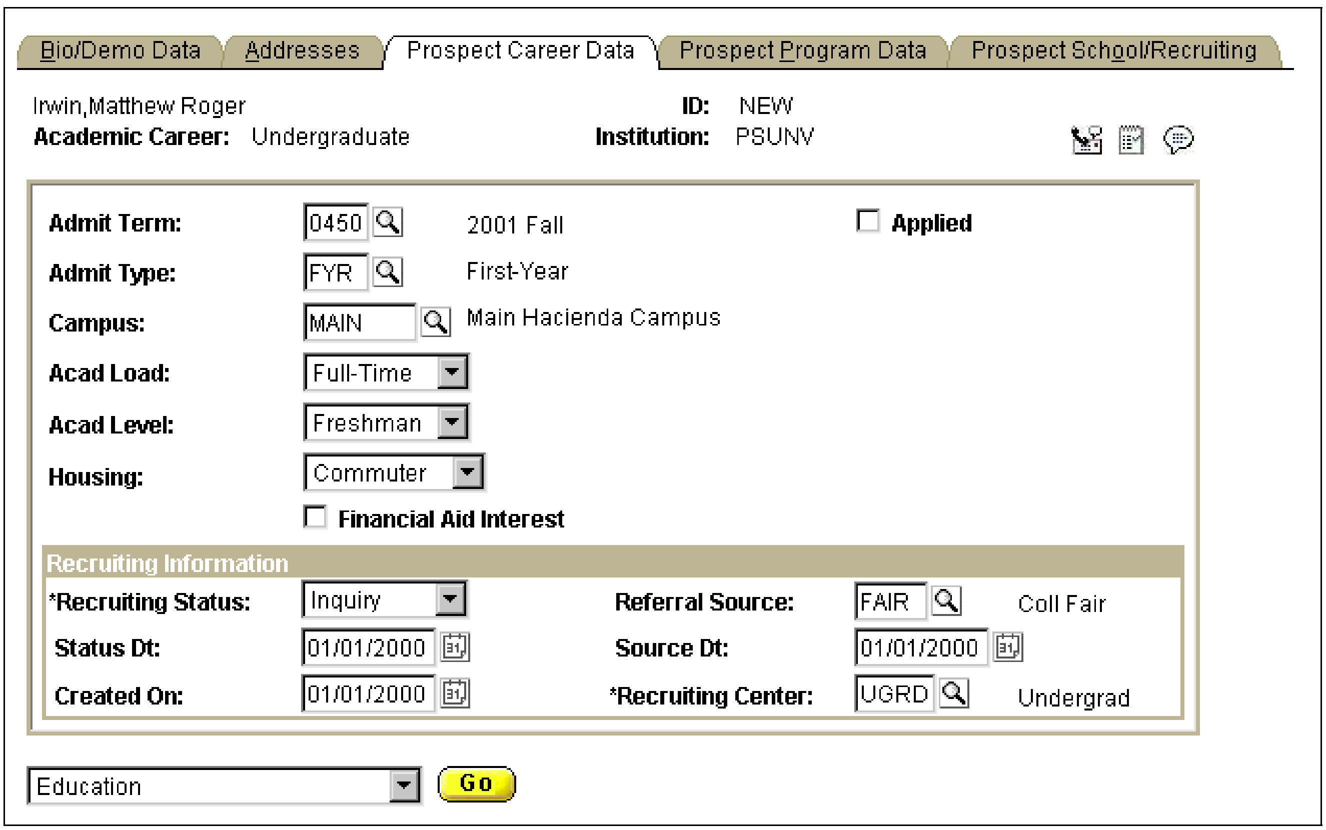
Use the Addresses page to view, enter, and update prospect addresses.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio /Demographic Data," Entering Addresses Data

Entering and Updating Prospect Academic Career Data

Access the Prospect Career Data page.



Prospect Career Data page

Multiple academic career records can be created for a prospect by adding another prospect record for each academic career. The first two pages in the Prospect Data component, the Prospect Bio/Demo Data page and the Addresses page, are the same for each academic career because the data on those pages is shared. The data on the remaining three pages in the Prospect Data component is unique to each academic career. Prospects are tracked at the academic career level at least.

Admit Term	Select the admit term for the prospect's career. Define admit terms on the Term Table page. (user defaults)
Admit Type	Select the prospect's admit type for this career. Define admit types on the Admit Type Table page. (user defaults)
Campus	Select a campus if you want to relate the prospect to a specific campus. Define campuses on the Campus Table page. (user defaults)
Acad Load (academic load)	Select the appropriate academic load for this career. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Level (academic level)	Select the academic level for this career. Values for this field are delivered with your system as translate values. You can modify these translate values.
Housing	Select any housing interest that this person indicated. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Commuter, Off Campus,* and *On Campus.* This field is for informational purposes. (user defaults)
Financial Aid Interest	Specify whether this prospect indicated an interest in financial assistance. This field is for informational purposes only. (user defaults)
Applied	The system automatically updates this check box when the prospect applies to your institution if, on the Installation Defaults - AD page, you specified that you want the system to update prospect records when prospects become applicants.
Recruiting Status	Select the person's recruiting status. The recruiting status indicates the level of interest, at the academic career level, that your institution has in the prospective student. For example, you might consider a person who attended an on-campus event a suspect (someone who you *suspect* is interested in your institution); whereas, you might consider a person who sends a prospect card a prospect (someone who you know is interested in your institution). This field is also helpful for targeting mass mailings. Values for this field are delivered with your system as translate values. These translate values and can be modified. The delivered values are *Applicant, Inactive, Inquiry, Prospect,* and *Suspect.*
Status Dt (status date)	Enter the date, if different than the default date, on which you entered or updated the recruiting status. The default date is the system date on the day of the last update.
Created On	Enter the date, if different than the default date, on which this prospect record was created. The default date is the system date on the day of the last update.
Referral Source	Select the appropriate referral source for this prospect. A referral source indicates how this person became a prospect. In other words, it is a high level indicator of how your institution came into contact with the person. For

example, a referral source could be *Drop-In, Campus Event,* or *College Fair.* Although this is a way to track your first contact with this person, record subsequent contacts with the Communication Management pages. Define referral sources on the Referral Source Table page.

Source Dt (source date) Enter the date, if different than the default date, on which you entered this referral source. The default date is the system date on the day of the last update.

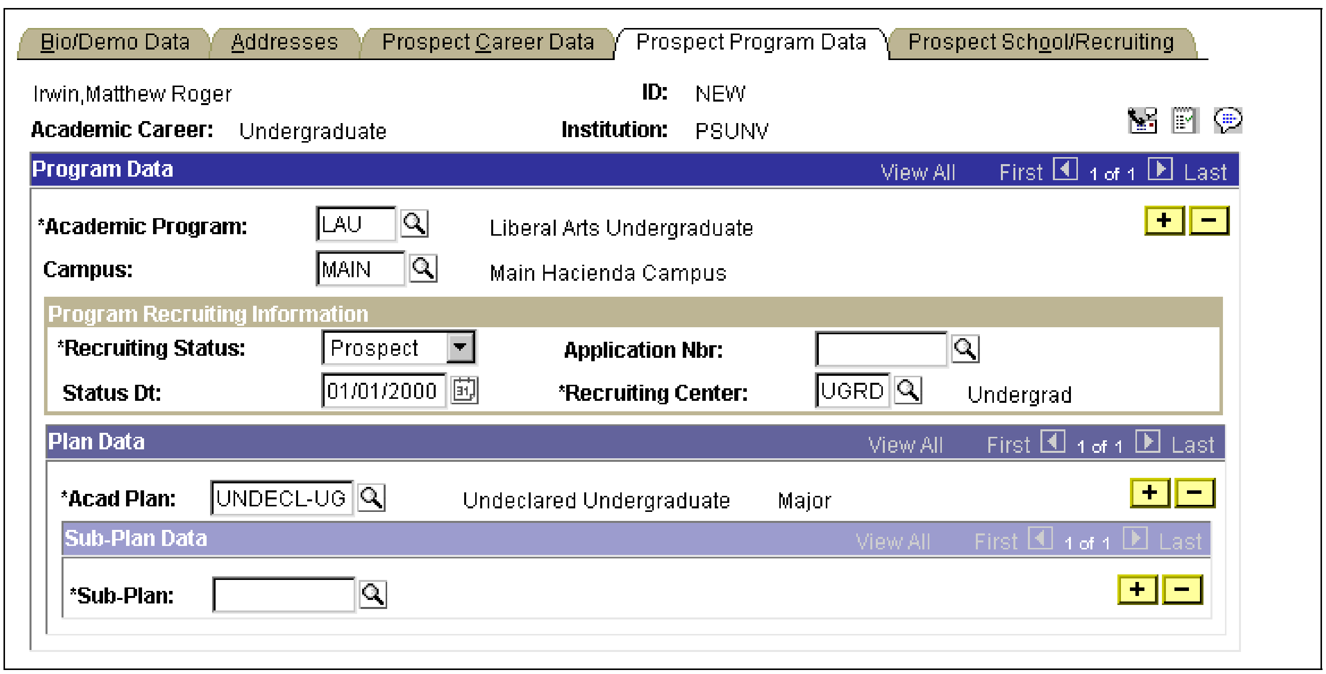
Recruiting Center Select the recruiting center that is responsible for this prospect's career. Define recruiting centers on the Recruiting Center Table page. Valid values depend upon the academic career that you select and are subject to user security established for recruiting centers. (user defaults)

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Note. To enter an additional career for a prospect, reenter the component and enter the new academic career when prompted by the system.

Entering and Updating Prospect Academic Program Data

Access the Prospect Program Data page.



Prospect Program Data page

While you are required to enter prospect career data, you are not required to enter prospect program data because you might not have that information at this stage. Tracking prospects by programs under a career, by academic plans under programs, and by subplans under academic plans are options that your institution can perform.

Recruiting Status Select the recruiting status for this particular program. Depending on your settings on the Installation Defaults - AD page, the system can update the recruiting status when the person applies to your institution. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Applicant, Inactive, Inquiry, Prospect,* and *Suspect.*

By tracking recruiting information at the academic program level, you can designate, at that level, a recruiting status different than that designated at the academic career level.

Status Dt (status date)
The status date is your system date on the day you last modified the Recruiting Status field.

Application Number
If the prospect applies to this academic program, the system automatically updates the application number.

Note. You determine, on the Installation Table - AD page, if the system automatically populates the *Application Number* field when the prospect applies.

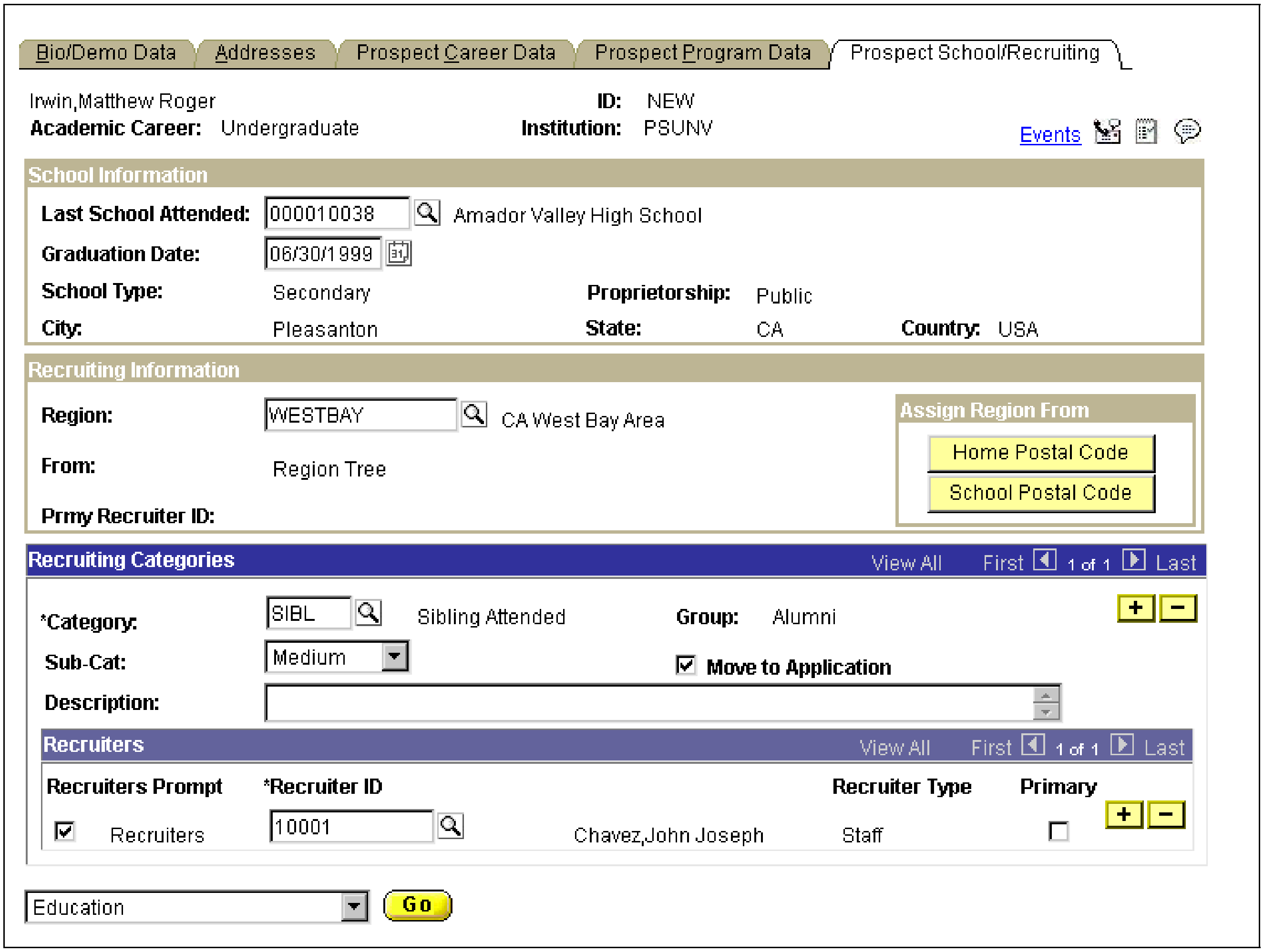
Recruiting Center
Select the recruiting center that is responsible for this particular program for the prospect. Define recruiting centers on the Recruiting Center Table page.

Acad Plan (academic plan) and **Sub-Plan**
Select an academic plan and subplan, if known. You can record multiple academic plans for a program, and you can record multiple subplans under an academic plan. Define academic plans in the Academic Plan Table component and academic programs in the Academic Program Table component. (user defaults)

Note. Multiple program data records can be created for a prospect because a person might be interested in multiple programs within one academic career. Additionally, a prospect can have multiple plans and subplans. Add rows to add additional programs, plans, and subplans.

Entering and Updating Prospect School and Recruiting Data

Access the Prospect School/Recruiting page.



Prospect School/Recruiting page

School Information

Last School Attended

Select the prospect's last school attended. Since a person might attend several schools in his or her external academic career, it is helpful to know which school the person attended most recently. You can use this information to target that school for recruiting visits. (user defaults)

Graduation Date

Select the expected graduation date from the last school attended. Define schools on the Organization Table page. (user defaults)

Recruiting Information

Region

You can assign a recruiting region manually or automatically. To manually assign a region, prompt on the Region field and select the proper value. Define regions on the Region Table page.

Home Postal Code

Click to automatically assign the recruiting region, based on the home postal code of the prospect. Assigning recruiting regions based on home address postal codes requires that the region tree be defined.

School Postal Code

Click to automatically assign the recruiting region, based on the postal code of the primary location of the prospect's last school attended. Assigning recruiting regions based on school postal codes requires that the region tree be defined.

See Chapter 2, "Building Your Recruiting Structure," Setting Up Your Recruiting Structure, page 5.

From

This display-only field shows you how this region was defined:

Region Tree: appears if you *manually* assigned a region.

Address: appears if you assigned the region by clicking theHome Postal Code button.

School: appears if you assigned the region by clicking the *School Postal Code* button.

See Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 12.

Recruiting Categories

Category

Select a recruiting category for the prospect within this career. In our example, the prospect's sibling attended the institution. Define recruiting categories on the Recruiting Category Table page. Categories are used to target and report on students.

You can enter multiple recruiting categories and prospect supporting information for each career.

Note. If you plan to assign a regional recruiter to this prospect, you must enter a category of *REGN* (region).

Sub-Category

Select a recruiting subcategory, if known. Subcategories can indicate the priority of this recruiting category. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), High, Low,* and *Medium.*

Group

The system automatically populates this field from the Recruiting Category Table page after you enter a recruiting category in the Category field.

Move to Application

Select this check box if you want the information in theRecruiting Categories group box copied to the application record when the prospect applies to your institution. The system selects this check box if you determined that prospect data should be copied to the application by selecting the Copy Data and Recruiting Categories check boxes on the Installation Defaults − AD page.

Recruiters

Recruiter assignment is tied to recruiting categories. If you entered a recruiting category, the Recruiters group box becomes available. Use this section to assign one or more recruiters pertinent to this category for the prospect. You can add multiple recruiters under all categories entered.

When selecting recruiters, you might want to see all of the recruiters in your system, or you might want to see only recruiters linked to the current recruiting category. The system uses various methods to specify the selection of recruiters when you prompt on the Recruiter ID field.

Recruiters Prompt

Select this check box if you want *all* recruiters to be available when you prompt on the Recruiter ID field, regardless of the recruiting category to which recruiters are assigned.

Clear this check box if you want only the recruiters assigned to the current recruiting category to be available when you prompt on the Recruiter ID field. The *REGN* (region) category works differently.

If you are adding recruiters for the recruiting category *REGN,* you select only from recruiters in the same region as the region selected on the Prospect School/Region page. You can enter a region on the Prospect School/Region page manually or automatically. The regional recruiters that you see when you prompt on the Recruiter ID field vary, depending on how you entered the region.

If you entered the region according to the last school attended, by clicking the External Organization button, the Prompt Table field displays *Recruiters for School's Region,* and prompting at the Recruiter ID field brings up any recruiters assigned to that school. If no recruiters are assigned to that school, then your choices are any recruiters assigned to the region.

If you entered the region according to the prospect's home address by clicking the Home Postal Code button, the Prompt Table field displays *Recruiters from Address Region,* and pressing the prompt at the Recruiter ID field brings up all recruiters assigned to the region.

If you manually assigned the region (that is, from the region tree) all recruiters assigned a recruiting category of *REGN* are available when you prompt for values on the Recruiter ID field. The Prompt Table display field then displays *Recruitment Category.*

If you want to override what the application is doing according to your category and region selections, select the Recruiters Prompt check box. All recruiters for the academic career are then available when you prompt for values on the Recruiter ID field.

Recruiter ID

Select the ID of the person being assigned to this prospect. You can assign multiple recruiters for any recruiting category to a prospect.

Recruiter Type

The recruiter type appears automatically, based on the recruiter ID.

Primary

Select this check box if this is the primary recruiter for this academic career. The ID of the person who has been marked *Primary* appears on the Prospect School/Recruiting page in the Primary Recruiter ID field. Also, you can report on primary versus nonprimary recruiters using this option.

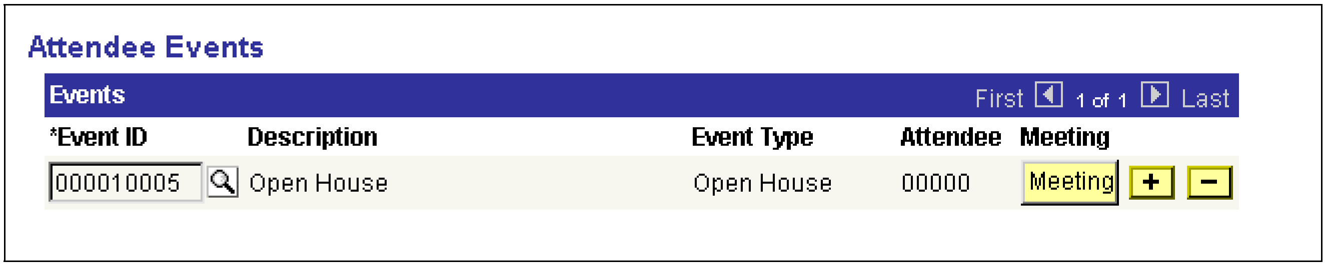
Events

Click to record the events that this prospect attended or was invited to. The Attendee Events Page appears.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Tracking Prospects Event Attendance

Access the Attendee Events page.



Attendee Events page

Event ID Select the ID of the event that the prospect is attending (or attended).

Description, Event Type, and **Attendee** The description, event type, and attendee automatically appear after you select the event ID.

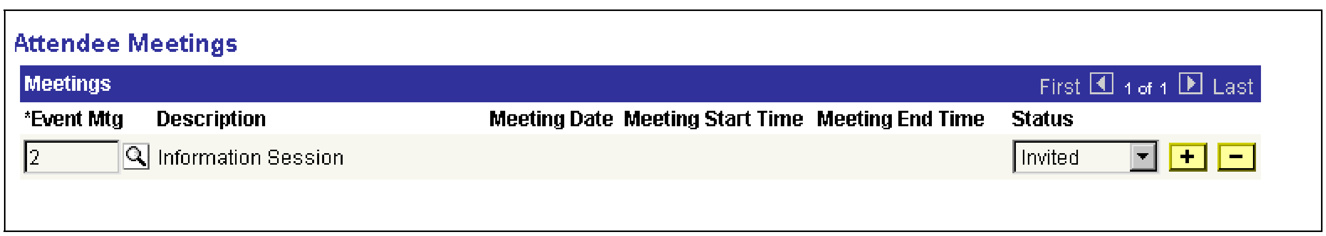
Meetings Click to view the Attendee Meetings Page if there are any meetings associated with this event, or if the event is broken into sessions.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Events Data," Creating an Event

Recording Event Meeting Information

Access the Attendee Meetings page.



Attendee Meetings page

Event Mtg (event meeting), **Description, Meeting Date, Meeting Start Time,** and **Meeting End Time** Select the event meeting number. The event description, meeting date, meeting start time, and meeting end time automatically appear after you enter the event meeting number.

Status Enter the attendee's status regarding this meeting. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Attended, Invited, Not Attend,* and *Will Attend.*

Viewing Prospect Information

This section discusses how to view prospect information.

Pages Used to View Prospect Information

Page Name	Object Name	Navigation	Usage
Prospect Summary	ADM_PRSPCT_SUMM	Develop Enrollment, Recruit Prospective Students, Inquire, Prospect Summary, Prospect Summary	View a summary of information about a prospect, such as academic career, recruiting status, and referral source. You can also view whether or not this prospect has applied.
Prospect Programs	ADM_PRSPCT_S_SEC	Click the Program link on the Prospect Summary page. This link appears if you have entered academic program data for this prospect.	View information about a prospect's academic career. You can click the Detail Panel link to transfer directly to the person's Prospect Career Data page at the row for this academic career.
Prospect Recruiters	PRSPCT_RCR_SUMMARY	Develop Enrollment, Recruit Prospective Students, Inquire, Prospect Recruiters, Prospect Recruiters	Look up a list of a prospect's recruiters for an academic career.

Assigning Regions, Recruiting Categories, and Recruiters on a Mass Basis

This section provides an overview and discusses how to:

- Use general criteria to select the prospect group.
- Use academic criteria to select the prospect group.
- Use program and plan criteria to select the prospect group.
- Use academic interests criteria to select the prospect group.
- Assign regions, recruiters, and recruiting categories to the prospect group.

Understanding the Assignment of Regions, Recruiting Categories, and Recruiters on a Mass Basis

Use the Process Recruiters component to assign regions, recruiting categories, and recruiters to a *group* of prospects at one time. You can select the group of prospects based on any of the following selection criteria:

- Biographic and demographic data, such as gender, ethnicity, and citizenship.
- Address data, such as state and postal codes, or a range of postal codes.

- Geographic region, based on last school attended, prospect's home address, or the region tree.
- Academic institution, last school attended, academic career, program, plan, and campus.
- Recruiting status and recruiting center.
- Other items, such as referral source, academic interest, housing interest, and financial aid interest.

You can assign regions, recruiting categories, and recruiters to prospects based on one or more of the fields on these pages. The number of fields that you use to narrow the selection is entirely up to you. For example, you can define only one field, such as Country, and select all prospects in the USA. Or you can use multiple selection criteria fields to capture a specific prospect group. For example, you can select all Native American females whose home address is within postal code 10990, with a certain academic career and academic program, who have an academic interest in law with a priority ranked between 1 and 5. Using more selection criteria fields narrow the group of prospects being selected for assignment to a region, recruiting category, and recruiter.

See Also

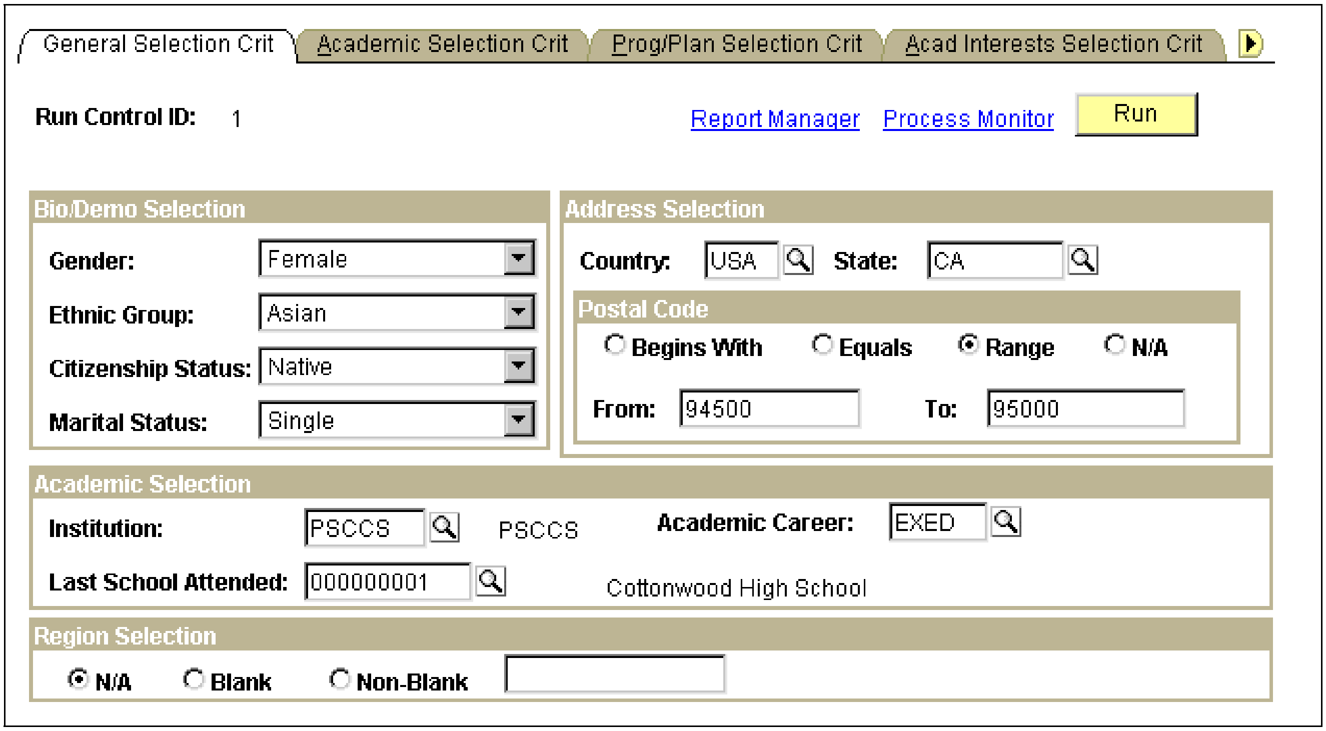
Chapter 9, "Recruiting Prospective Students," Adding Prospects, page 77

Pages Used to Assign Regions, Recruiting Categories, and Recruiters on a Mass Basis

Page Name	Object Name	Navigation	Usage
General Selection Crit (general selection criteria)	ADM_PERS_CAR_PARMS	Develop Enrollment, Recruit Prospective Students, Process, Process Recruiters, General Selection Crit	Use the General Selection Crit (general selection criteria) page to specify the prospect group for which you want to assign regions, recruiting categories, and recruiters.
Academic Selection Crit (academic selection criteria)	ADM_CAR_PARMS	Develop Enrollment, Recruit Prospective Students, Process, Process Recruiters, Academic Selection Crit	Enter any academic selection criteria for the prospect group.
Prog/Plan Selection Crit (program or plan selection criteria)	ADM_PROGRAM_PARMS	Develop Enrollment, Recruit Prospective Students, Process, Process Recruiters, Prog/Plan Selection Crit	Enter any academic program or academic plan selection criteria for the prospect group.
Acad Interests Selection Crit (academic interests selection criteria)	ADM_INTEREST_PARMS	Develop Enrollment, Recruit Prospective Students, Process, Process Recruiters, Acad Interests Selection Crit	Enter any subject area selection criteria for this prospect group. You can select people for prospect groups that have expressed an academic interest in certain subject areas if you want to assign regions, recruiting categories, and recruiters based on this criteria.
Assignment Crit (assignment criteria)	ADM_RECRREGN_PARMS	Develop Enrollment, Recruit Prospective Students, Process, Process Recruiters, Assignment Crit	Assign regions, recruiting categories, and recruiters to the prospect group.

Using General Criteria to Select the Prospect Group

Access the General Selection Crit (general selection criteria) page.



General Selection Crit page

Note. All of the items that you enter on this page must apply to a person to have the system select him or her for the prospect group that you create. For example, you can select a female from Cottonwood High School with an admit term of spring 2001 and an academic load of Full Time. Only persons to whom *all* of these conditions apply are selected. This is an example of AND logic. Contrast this with the discussion of OR logic in the Program Data group box on the Prog/Plan Selection page.

Bio/Demo Selection

Gender Select whether you want *(none), Female, Male,* or *Unknown* if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Ethnic Group Select an ethnic group if you want to assign based on this criterion. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Citizenship Status Select a citizenship status if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Marital Status Select a marital status if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Address Selection

Country and **State** Select the country and state if you want to assign regions, recruiting categories, and recruiters based on these criteria.

Postal Code

Use this group box if you want to select a prospect group from a certain postal code or postal code range. Select the appropriate option, depending on how you want to select by postal code. Only one of these options can be selected.

Begins With and **From**	Choose a prospect group by a beginning postal code. Enter the beginning postal code in the From field. For example, use this option if one person has a 5-digit postal code entered *(90068)* and another person has a 9-digit version of the postal code entered *(90068-6328)*. Using a postal code that begins with *90068* finds both people.
Equals	Select this option to choose a prospect group by a specific postal code. Enter the postal code in the From field.
Range, From, and **To**	Select *Range* if you want to select a prospect group by a postal code range. Enter the beginning postal code in the From field and the ending postal code in the To field.
N/A	Select *N/A* if you do *not* want to use a postal code in your selection criteria for this prospect group. This is the default setting.

Academic Selection

Institution and **Academic Career**	Enter the academic institution and career and for this prospect group. If you do not select an academic institution and an academic career, there are no prompt values—such as admit term, admit type, and referral source—on certain fields on the Acad Interests Selection Crit (academic interests selection criteria) page and the Program/Plan Selection Crit (program or plan selection criteria) page.
Last School Attended	Select a last school attended if you want to assign regions, recruiting categories, and recruiters based on this criterion.

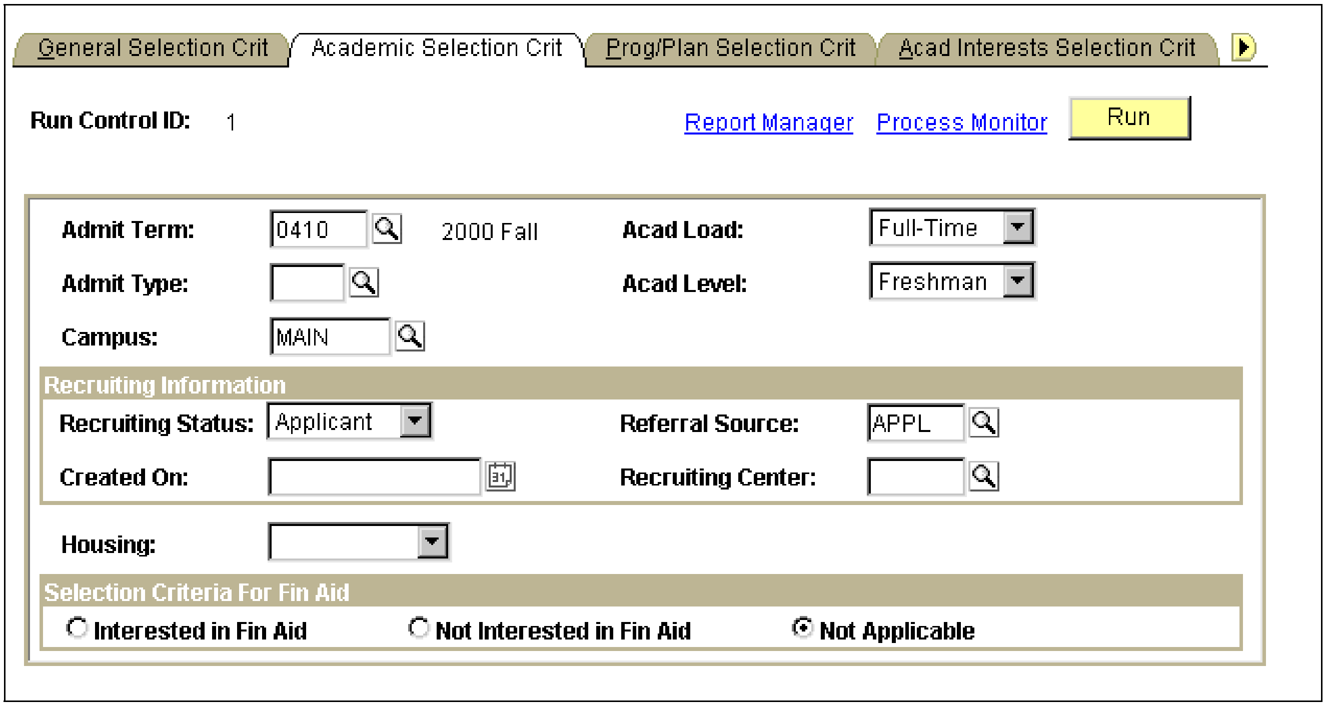
Region Selection

In this group box, indicate how you will choose this prospect group if you want to assign regions, recruiting categories, and recruiters based on this criterion.

N/A	Select this option if you do *not* want to use region in your selection criteria for this prospect group.
Blank	Select this option if you want to select people for a prospect group who do *not* have a region assigned.
Non-Blank	Select this option if you want to select prospects who have been assigned a geographical region.

Using Academic Criteria to Select the Prospect Group

Access the Academic Selection Crit (academic selection criteria) page.



Academic Selection Crit page

Admit Term
Select the admit term for this career for the prospect group if you want to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic career entered on the General Selection Crit page.

Admit Type
Select the admit type for this career if you want to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic career entered on the General Selection Crit page.

Campus
Select a campus if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Acad Load (academic load)
Select the appropriate academic load for this career if you want to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic career entered on the General Selection Crit page.

Acad Level (academic level)
Select an academic level for this career if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Note. If you have not selected an academic institution and an academic career on the General Selection Crit page, there are no prompt values for these fields.

Recruiting Status
Select the recruiting status if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Created On
Enter the date that prospect records were created if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Referral Source — Select the referral source if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Recruiting Center — Select the recruiting center that prospects in this career are assigned to if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Housing — Select a housing interest for this prospect group if you want to assign regions, recruiting categories, and recruiters based on this criterion.

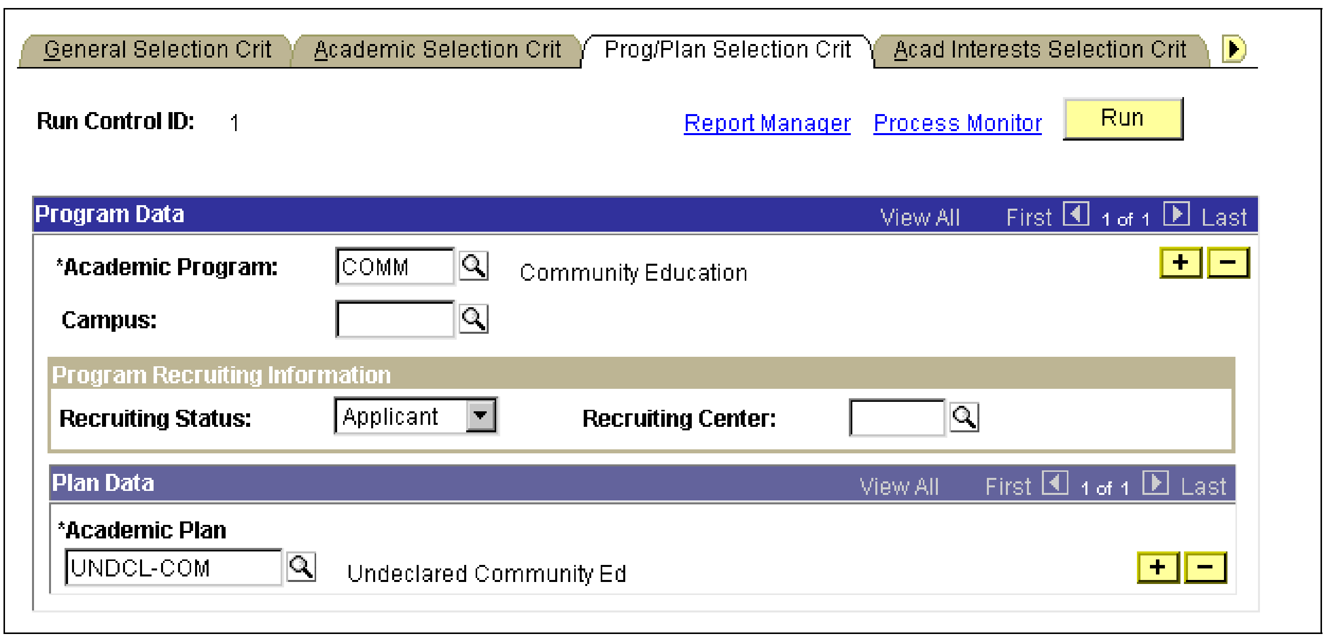
Interested in Fin Aid (interested in financial aid) — Select this option to select a prospect group by those indicating an interest in financial aid.

Not Interested in Fin Aid (not interested in financial aid) — Select this option to select a prospect group by those who have specified that they are *not* interested in financial aid.

Not Applicable — Select this option to selects a prospect group *regardless* of their expressed interest in financial aid. This is the default setting.

Using Program and Plan Criteria to Select the Prospect Group

Access the Prog/Plan Selection Crit (program or plan selection criteria) page.



Prog/Plan Selection Crit page

Academic Program — Select an academic program for this prospect group. Valid values depend upon the academic institution and career that you select on the General Selection Crit page. You can select more than one academic program. If you enter more than one academic program, for example *Liberal Arts* and *Fine Arts,* people who are in either the Liberal Arts *or* the Fine Arts academic programs are selected for this prospect group. Whenever you see a scrollable field (First-Next-Previous-Last links available on the right-hand side) in this component, the OR logic applies; one or the other must be true for that person to be selected. Contrast this to the AND logic discussed in “Using General Criteria to Select the Prospect Group."

Campus Select a campus for this prospect group if you want to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic program selected.

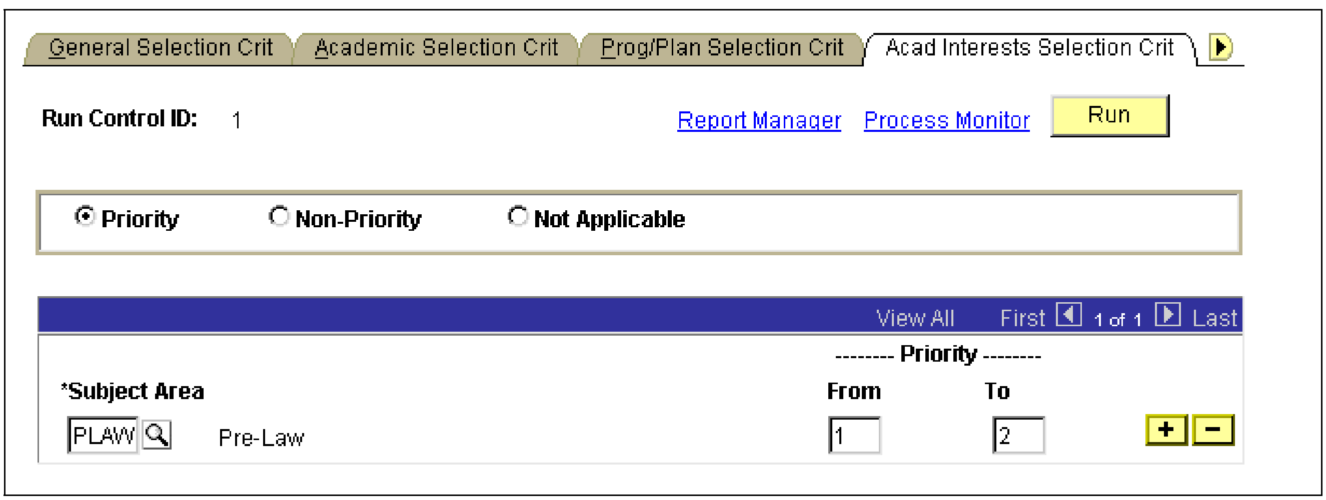
Recruiting Status Select a recruiting status for this academic program if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Recruiting Center Select a recruiting center for this academic program if you want to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the selected academic career and are subject to the user security established for recruiting centers.

Academic Plan Select an academic plan for the academic program entered in the Academic Program field if you want to assign regions, recruiting categories, and recruiters based on this criterion. You can enter more than one academic plan. If you enter one academic plan, a person must have that plan to be selected for this prospect group. If you enter more than one academic plan, a person must have only *one* of the plans that you enter to be included in this prospect group.

Using Academic Interests Criteria to Select the Prospect Group

Access the Acad Interests Selection Crit (academic interests selection criteria) page.



Acad Interests Selection Crit page

Priority Select this option to select prospects that have expressed a prioritized interest in certain subject areas.

Non-Priority Select this option to select prospects that have expressed a nonprioritized interest in certain subject areas.

Not-Applicable Select this option to select prospects *regardless* of their expressed interest in any subject area. This is the default option.

Subject Area Select individuals for a prospect group who have expressed an academic interest in a common subject area. This is optional and based on which of the options *(Priority, Non-Priority,* or *Not-Applicable)* you selected. You can enter more than one subject area. For example, suppose you enter *English* and *Math* as subject areas. The system selects those people who have expressed an interest in either English or math for this prospect group. Therefore, the OR logic applies; one or the other must be true for that person to be selected. Contrast this to the AND logic discussed in the Bio/Demo Selection group box on the first page in this component.

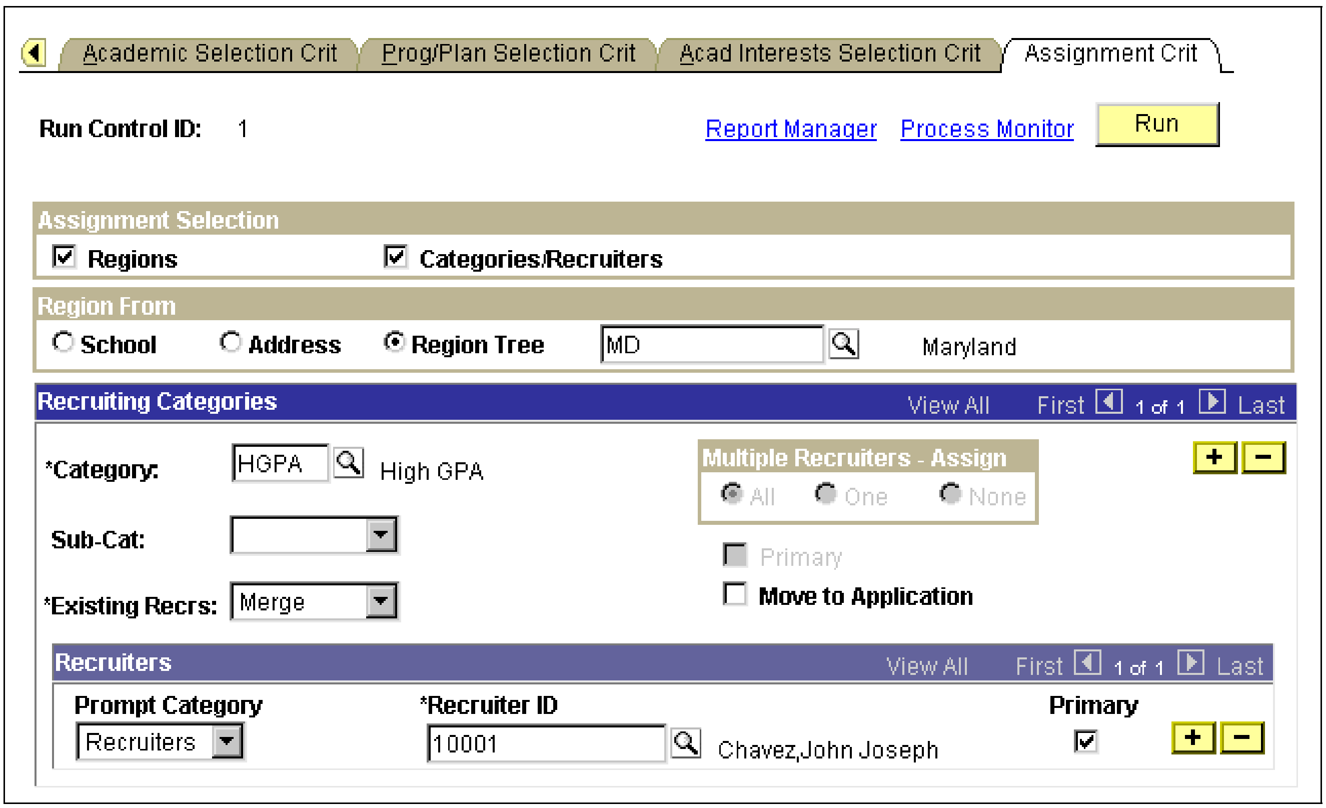
From and **To** — Enter an academic interest priority range. For example, you can select people for this prospect group who have expressed an interest in prelaw as their first or second interest choice. These fields are relevant only if you selected the Priority option.

See Also

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Pages Used to Track Other Information for Prospects and Applicants, page 102

Assigning Regions, Recruiters, and Recruiting Categories to the Prospect Group

Access the Assignment Crit page.



Assignment Crit page

Assignment Selection

Regions and **Categories/Recruiters**
Choose the criteria for processing this prospect group: assign regions to the prospect group; assign recruiting categories and recruiters to the prospect group; or, by selecting both check boxes, assign regions, recruiting categories, and recruiters to the prospect group. The system selects both check boxes by default.

Region From

You can automatically or manually assign a region for the individuals in this prospect group. These fields are only relevant if you select the Regions check box.

School
Select this option if you want the system to automatically assign a region for this prospect group, based on the primary location postal code of the school that the person last attended.

Address
Select this option if you want the system to automatically assign a region for this prospect group, based on the home address postal code of the person.

Region Tree
You manually assign a region for this prospect group by prompting on the Region field to the right of the Region Tree. If you are manually assigning a region to the prospect group, select this option and prompt on the Region field to the immediate right. Select a region from the list.

Important! If you plan to assign a regional recruiter to this prospect, you must enter a category of *REGN* (region) in the Category field.

Recruiting Categories

Use this group box to assign recruiting categories to the prospect group. Recruiting categories are used to target a prospect group for special attention during the recruiting and admissions business process.

Category
Select a recruiting category for this prospect group, for example, *HTST* (high test scores). You can assign multiple recruiting categories. Define recruiting categories on the Recruiting Category Table page. These categories are used in the recruiting and application processes to target and report on students.

Sub-Cat (category)
Select a recruiting category, if known. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), High, Low,* and *Medium.* A category can be used to indicate the priority of this recruiting category.

Existing Recrs (existing recruiters)
Choose what to do if there are already existing recruiters for people in this prospect group. You can choose to merge them or replace them with the recruiters that you are assigning now. The system selects *Merge* by default.

Move to Application
Select this check box if you want the recruiting categories carried to the application records when individuals in this prospect group apply to your institution. However, you must set up your installation defaults to allow

the recruiting category to be copied. Select the Recruiting Categories check box on the Installation Defaults - AD page.

Multiple Recruiters - Assign

This group box becomes active when you assign recruiters to prospects by the region category.

All Select this option to assign to this prospect group all of the region's recruiters in the specific region that you are pulling from.

One Select this option to assign to this prospect group one of the region's recruiters in the specific region from which you are pulling. The process assigns the first recruiter it finds who is assigned to this recruiting category.

None Select this option if you want the process to assign no recruiters if there are multiple recruiters for this category.

Recruiters

Prompt Category Use this field to assign recruiters to the prospect group for all recruiting categories other than *REGN.* Select *Categories* if you want the list of recruiters that appears in the Recruiters ID field to show only recruiters for the category entered in the Recruiting Categories group box. Select *Recruiters* to display a list of all recruiters regardless of their category.

If you chose the *REGN* category, the Recruiting Categories and Recruiters group boxes become unavailable.

Recruiter ID Select a recruiter ID for the prospect group. The list of recruiters that appears depends on what you entered in the Prompt Category field.

Primary Select this check box if you want the recruiter to be designated as the primary recruiter.

Note. Save the page before clicking the Run button.

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

Using Outreach for Recruiting and Admissions

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the Outreach application, you can use the self-service pages described here.

See Chapter 20, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 382.

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

See Also

PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook, “Working With Self-Service Outreach”

Prerequisites

Before recruiting officers can view prospects and applicants through self-service pages, they must have prospects and applicants assigned to them. Assign a recruiter to a prospect on the Prospect School/Recruiting page or through the Process Recruiters pages. Assign a recruiter to an applicant on the Application School/Recruiting page.

Pages Used to Manage Outreach for Recruiting and Admissions

Page Name	Object Name	Navigation	Usage
Recruiting Home Page	AD_OUTREACH_HOME	Outreach, Recruiting Officer, Home, Recruiting, Recruiting Home Page	Recruiting officers use this page to view prospects and applicants by category, organization, and region.
Prospects by Category – Select Search Criteria	SS_ADM_PRS_REQ_CAT	• Outreach, Recruiting Officer, Home, Recruiting, By Category • Outreach, Recruiting Officer, Tasks, View Prospects By Category	Recruiting officers use this page to search for prospects by category.
Prospects by Category – Search Results	SS_ADM_PRS_SUM_CAT	Click the Search button on the Prospects by Category – Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Program Detail link on any one of the prospect search results pages.	Recruiting officers use this page to view program details for a prospect.
Prospects by Organization – Select Search Criteria	SS_ADM_PRS_REQ_ORG	• Outreach, Recruiting Officer, Home, Recruiting, By Organization • Outreach, Recruiting Officer, Tasks, View Prospects By Organization	Recruiting officers use this page to search for prospects by organization.
Prospects by Organization – Search Results	SS_ADM_PRS_SUM_ORG	Click the Search button on the Prospects by Organization – Select Search Criteria page.	Recruiting officers use the page to view prospect search results.
Organization Primary Location	EXT_ORG_LOC	Click the Org Primary Location link on the Prospects by Organization – Search Results page.	Recruiting officers use this page to view the organization’s primary address.
Prospects by Region – Select Search Criteria	SS_ADM_PRS_REQ_REG	• Outreach, Recruiting Officer, Home, Recruiting, By Region • Outreach, Recruiting Officer, Tasks, View Prospects By Region	Recruiting officers use this page to search for prospects by region.

Page Name	Object Name	Navigation	Usage
Prospects by Region – Search Results	SS_ADM_PRS_SUM_REG	Click the Search button on the Prospects by Region – Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Applicants by Category – Select Search Criteria	SS_ADM_APP_REQ_CAT	• Outreach, Recruiting Officer, Home, Recruiting, By Category • Outreach, Recruiting Officer, Tasks, View Applicants By Category	Recruiting officers use this page to search for applicants by category.
Applicants by Category – Search Results	SS_ADM_APP_SUM_CAT	Click the Search button on the Applicants by Category – Select Search Criteria page.	Recruiting officers use this page to view applicant search results.
Applicants by Category – Program Detail	SS_ADM_APPL_PROG_C	Click the Program Detail link on any one of the applicant search results pages.	Recruiting officers use this page to view program details for an applicant.
Applicants by Category – Application Status	SS_ADM_APP_ST_CAT	Click the Application Status link on the Applicants by Category – Program Detail page.	Recruiting officers use this page to view a person’s application status.
Applicants by Organization – Select Search Criteria	SS_ADM_APP_REQ_ORG	• Outreach, Recruiting Officer, Home, Recruiting, By Organization • Outreach, Recruiting Officer, Tasks, View Applicants By Org	Recruiting officers use this page to search for applicants by organization.
Applicants by Organization – Search Results	SS_ADM_APP_SUM_ORG	Click the Search button on the Applicants by Organization – Select Search Criteria page.	Recruiting officers use this page to view applicant search results.
Applicants by Region – Select Search Criteria	SS_ADM_APP_REQ_REG	• Outreach, Recruiting Officer, Home, Recruiting, By Region • Outreach, Recruiting Officer, Tasks, View Applicants By Region	Recruiting officers use this page to search for applicants by region.
Applicants by Region – Search Results	SS_ADM_APP_SUM_REG	Click the Search button on the Applicants by Region – Select Search Criteria page.	Recruiting officers use this page to view applicant search results.

CHAPTER 10

Tracking Supporting Prospect and Applicant Information

This chapter lists prerequisites and discusses how to:

- Track supporting information for prospects and applicants.
- View event and meeting summary information.
- View schools by groups.
- View a person's account summary.

Note. PeopleSoft Recruiting and Admissions shares functionality with PeopleSoft Campus Community. For this reason, many of the pages covered in this chapter are documented in their entirety in *PeopleSoft Campus Community.*

Prerequisites

Before you begin entering supporting information for a prospect or applicant, you must enter prospects and applicants into your database.

See Also

Chapter 14, "Adding and Updating Applications," page 161

Chapter 9, "Recruiting Prospective Students," Adding Prospects, page 77

Tracking Other Information for Prospects and Applicants

This section discusses how to track and view the following information for prospects and applicants:

- Academic interests.
- Electronic addresses.
- Extracurricular activities.
- Honors and awards.
- Languages.
- Names.
- Publications.

- Relations with your institution.
- Relationships.
- Residency data.
- Student group involvement.
- Work experience.
- Test results.
- Test summary information.

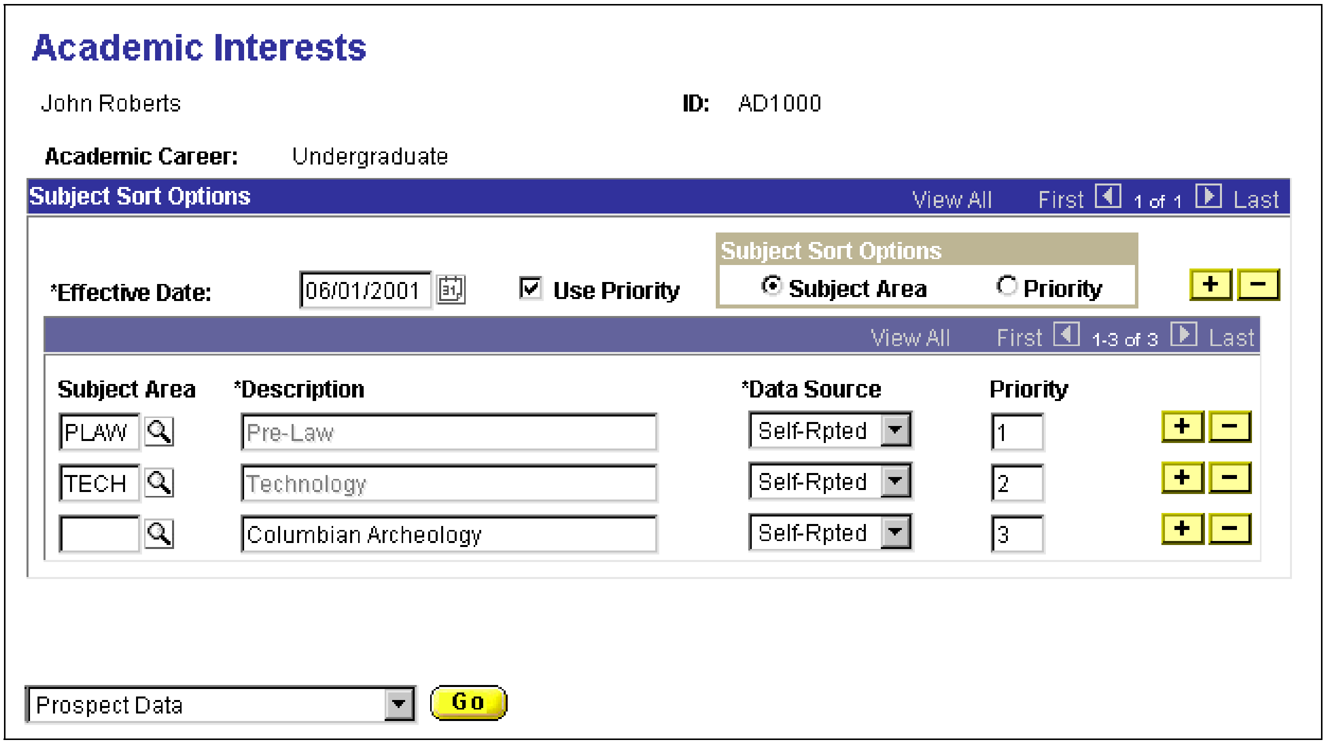
Pages Used to Track Other Information for Prospects and Applicants

Page Name	Object Name	Navigation	Usage
Academic Interests	ADM_INTERESTS	• Develop Enrollment, Process Applications, Use, Academic Interests, Academic Interests • Develop Enrollment, Recruit Prospective Students, Use, Academic Interests, Academic Interests	Record a person's external subject areas of interest, whether or not your institution offers them. You can also record the person's level of academic interest. For example, Pre-Law could be a person's first priority and Technology could be the person's second. You can use this information for recruiting purposes by determining what areas you offer that are similar to those recorded. This information is also valuable for reporting and academic program planning purposes.
Test Results	STDNT_TEST_SCORE	• Develop Enrollment, Evaluate Applicants, Use, Test Results, Test Results • Develop Enrollment, Process External Data, Use A-F, Test Results, Test Results • Develop Enrollment, Process Applications, Use, Test Results, Test Results • Manage Student Records, Process Transfer Credit, Use, Test Results, Test Results • Develop Enrollment, Recruit Prospective Students, Use, Test Results, Test Results	Enter manually test scores and related test information for a person. Various test information can also be loaded into this page through an external test score data load. Test results are stored under a person and therefore can be used when evaluating any application the person might have. Link test scores to an application on the Application Materials page.

Page Name	Object Name	Navigation	Usage
Test Summary	STDNT_TEST_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Academic Test Summary, Academic Test Summary • Develop Enrollment, Process External Data, Inquire, Academic Test Summary, Academic Test Summary • Develop Enrollment, Process Applications, Inquire, Academic Test Summary, Academic Test Summary • Manage Student Records, Process Transfer Credit, Inquire, Academic Test Summary, Academic Test Summary • Develop Enrollment, Recruit Prospective Students, Inquire, Academic Test Summary, Academic Test Summary	Look up a summary of academic test information for prospects and applicants. Information such as test score and data source is included on this page.

Tracking Academic Interests for Prospects and Applicants

Access the Academic Interests page.



Process Applications - Academic Interests page

Effective Date — Enter the effective date if it is different than the default, or current date. The effective date defines when the information you enter is valid.

Use Priority — Select this check box to prioritize a person's academic interests.

The default for this field is selected if you enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.

Subject Area — Select this option to alphabetically list the person's academic interests by subject area.

Priority — Select this option to rank the person's academic interests by level of enthusiasm.

Priority is the default if you enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page

Subject Area — Select a subject area. Define external subject areas on the External Subject Table page.

Description — The description for this subject appears.

If the person expressed an interest for which no subject area code is defined, leave the Subject Area field blank and enter a free-form description as shown in the third entry *(Colombian Archeology),* in the previous example.

Data Source — Select how this information was provided to your institution. For example, you can have received this information directly from the applicant or through a data load. Values for this field are delivered with your system as translate values. You can modify these translate values.

Priority

The academic interest priority feature assists your enrollment management and recruiting efforts. Enter a priority level, for example *1, 2, 3,* and so forth. *1* is the highest priority.

The default for this field is selected if you have enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.

Go

Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Tracking Electronic Addresses for Applicants

Use the Electronic Addresses page to enter or update electronic addresses for a person.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Entering and Updating Basic Bio/Demo Data

Tracking Extracurricular Activities for Prospects and Applicants

Use the Extracurricular Activities page to record information regarding a person’s external interests.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Tracking Work Experience

Tracking Honors and Awards for Prospects and Applicants

Use the Honors and Awards page to record a person’s honors and awards. For example, an external honors could be National Merit Finalist or Valedictorian. Internal honors and awards could be a scholarship for an incoming applicant or the Dean’s List for a matriculated student.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Tracking Student Data,” Tracking Honors and Awards

Tracking Languages for Prospects and Applicants

Use the Languages page to enter, update, and view language proficiency information.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Entering Languages Data

Tracking Names for Prospects and Applicants

Use the Prospect Names page to enter, update, and review name information. You can store numerous types of names for a person: primary, preferred, former, maiden, and so on. You can also search on these names using the Search/Match feature. When generating letters, you can specify the particular name you want to use.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Entering and Updating Basic Bio/Demo Data

Tracking Publications for Prospects and Applicants

Use the Publications page to enter, update, and review publication information. For example, a person might have written a book, produced a video, or published a thesis.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Participation Data,” Entering Publications Data

Tracking Relations With Your Institution for Prospects and Applicants

Use the Relations With Institution page to enter, update, and review information regarding relationships a person has with your institution. The status you designate here is reflected on the Search/Match Results page. There is a mass change definition delivered with your system that can update and move multiple peoples’ status as a background process.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Entering Relationships Data

Tracking Relationships for Prospects and Applicants

Use the Relationships page to enter, update, and review information regarding relationships a person has with any person in your database. For example, a person could have a friend or a relative in the database. The Relationships page can store data for people already existing in the system (those who have an ID), or for people who do not exist in the system. For those people who do not exist in the system, a new ID is not created for them if information is entered on this page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Entering Relationships Data

Tracking Residency Data for Prospects and Applicants

Use the Residency Data component to enter, update, and review residency information for a person.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Identification Data,” Entering Residency Data

Tracking Student Group Involvement for Prospects and Applicants

Use the Student Groups page to enter any student groups that your institution has defined to which this person belongs.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Tracking Student Data,” Tracking Student Groups

Tracking Work Experience for Prospects and Applicants

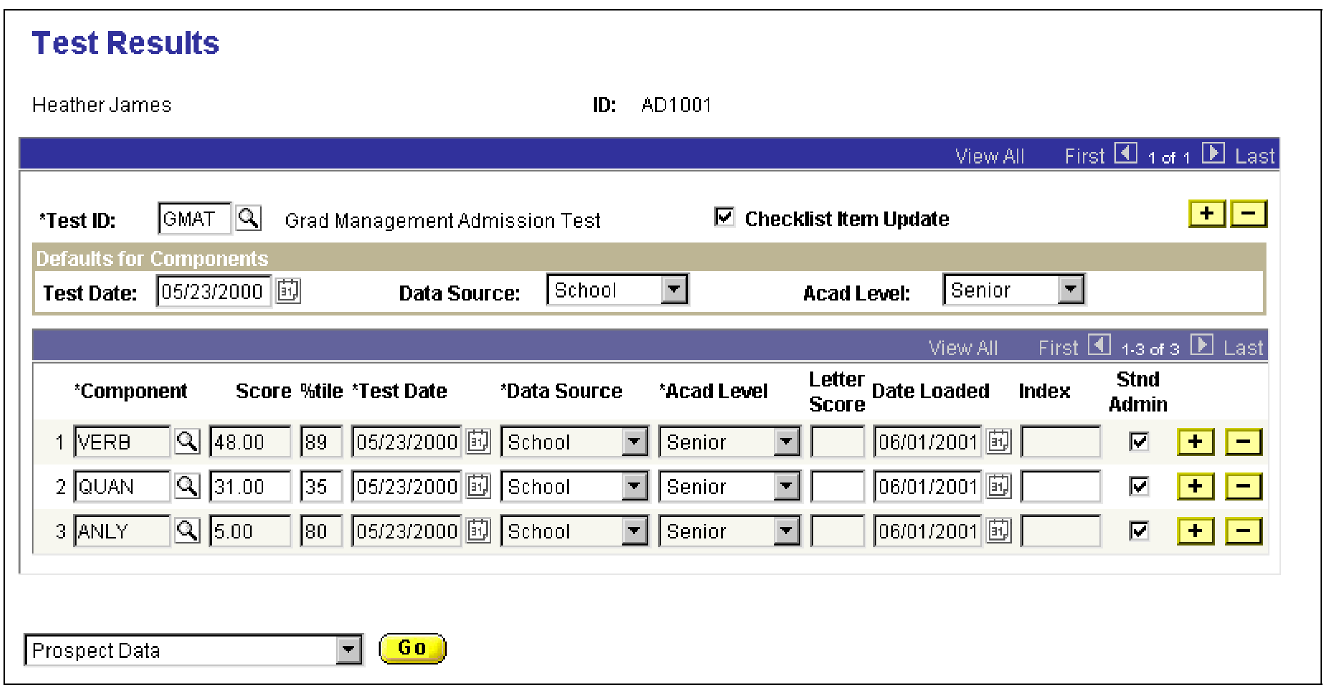
Use the Work Experience page to enter, update, and review work experience information you might have for a person.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Tracking Work Experience

Tracking Test Results for Prospects and Applicants

Access the Test Results page.



Test Results page

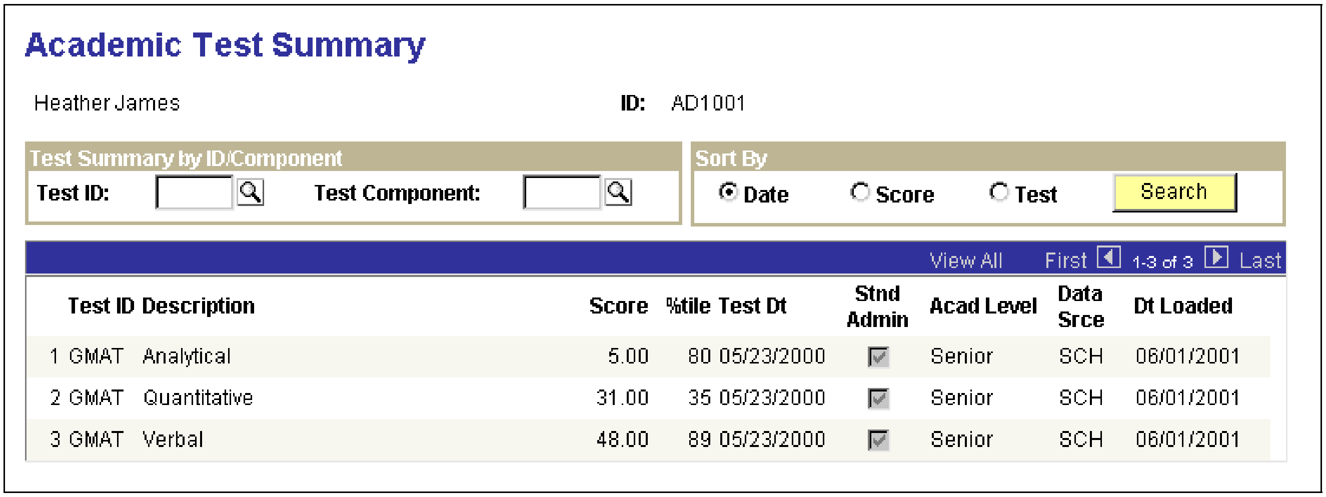
Test ID Select the test you are recording. Define tests on the Test Tables page.

Checklist Item Update Select this check box to indicate that the checklist related to this row of data is updated when you run the Checklist Item Update Automated process. When you save the page the system selects this check box automatically. To clear this check box, save the page, clear the check box, then save the page again.

Test Date	Enter the date this test was taken. The value you enter here populates the corresponding field in the bottom region of the page.
Data Source	Select how this test information was reported. For example, the data could have been self-reported or received from a testing agency. The value you enter here populates the corresponding field in the bottom region of the page. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Level (academic level)	Select the applicant's academic level at the time this test was taken. This level can be different from the applicant's current level. The value you enter here defaults to the corresponding field in the bottom region of the page. Values for this field are delivered with your system as translate values. You can modify these translate values.
Component	Select the first test component. Values for this field are determined by the test ID that you enter. Define test components on the Test Component Table page and are linked to tests on the Test Tables page.
Score %tile (score percentile)	Enter the score, percentile, or both for this test component.
Test Date	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the date if necessary.
Data Source	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.
Acad Level	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.
Letter Score	Enter a letter score for this test component, if applicable.
Date Loaded	The default for the loaded date is your system date. Edit this field if necessary. If this information is electronically loaded, this field is automatically filled in with your system date the day the data is loaded.
Index	The LSAT 3-Year Test Index appears if this information has been loaded.
Stnd Admin (standard administration)	The system selects this check box by default. This means that this test was administered in a standard fashion. Clear this check box if the test was administered in a non-standard or non-timed fashion.
Go	Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Viewing Academic Test Summary Information for Prospects and Applicants

Access the Academic Test Summary page.



Academic Test Summary

Heather James ID: AD1001

Test Summary by ID/Component

Test ID: Test Component:

Sort By

Date Score Test Search

View All First 1-3 of 3 Last

	Test ID	Description	Score	%tile	Test Dt	Stnd Admin	Acad Level	Data Srce	Dt Loaded
1	GMAT	Analytical	5.00	80	05/23/2000	☑	Senior	SCH	06/01/2001
2	GMAT	Quantitative	31.00	35	05/23/2000	☑	Senior	SCH	06/01/2001
3	GMAT	Verbal	48.00	89	05/23/2000	☑	Senior	SCH	06/01/2001

Academic Test Summary page

Test ID and **Test Component**	Select the test ID and, if desired, a test component about which you want to view summary information.
Date, Score, or **Test**	Select how you want to order the summary information, by date, score or test.
Search	Click to bring up information matching your search criteria.

Viewing Event and Meeting Summary Information

Use the Person Event Summary page to look up summary information regarding events and meetings for any prospect or applicant in your database.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Events Data,” Reviewing Events, Meetings, and Attendees

Viewing Schools by Groups

Use the Organization Groups page to view schools or any type of organization, in groups you designate. You can display the list in the order you choose.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Organization Data,” Reviewing Organization Data

Viewing a Person's Account Summary

You can view a summary of a person's account history through a PeopleSoft Student Financials inquire page. Use the Customer Accounts page to view a person's account history.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, "Common Pages in PeopleSoft Student Financials," Viewing Student Accounts

CHAPTER 11

Tracking External Education Information

This chapter provides an overview of external education information and discusses how to:

- Enter and update external data.
- View summary education data.

Understanding External Education Information

Enter and update academic information from external sources, such as transcripts, in the Education component. You can record general and specific external education data, such as schools attended, academic summaries, subjects, degrees, courses, dates of attendance, and so forth. You can later link the appropriate data from these pages to actual applications.

Note. The Education information on this component is linked to a *person* as opposed to an *application,* so it can be considered later when evaluating specific applications for the person.

This information could be reported on a transcript, self-reported, or reported from another source. The information can be linked to specific applications on the Application Materials page.

Entering and Updating External Data

This section discusses how to:

- Enter general external data.
- Enter and update external academic summary information.
- Enter and update external subject information.
- Enter external subject area details.
- (CAN) Enter and update ESIS previous education data.
- Enter and update external degrees.
- Enter and update external courses.
- Enter external course default data.

Pages Used to Enter and Update External Data

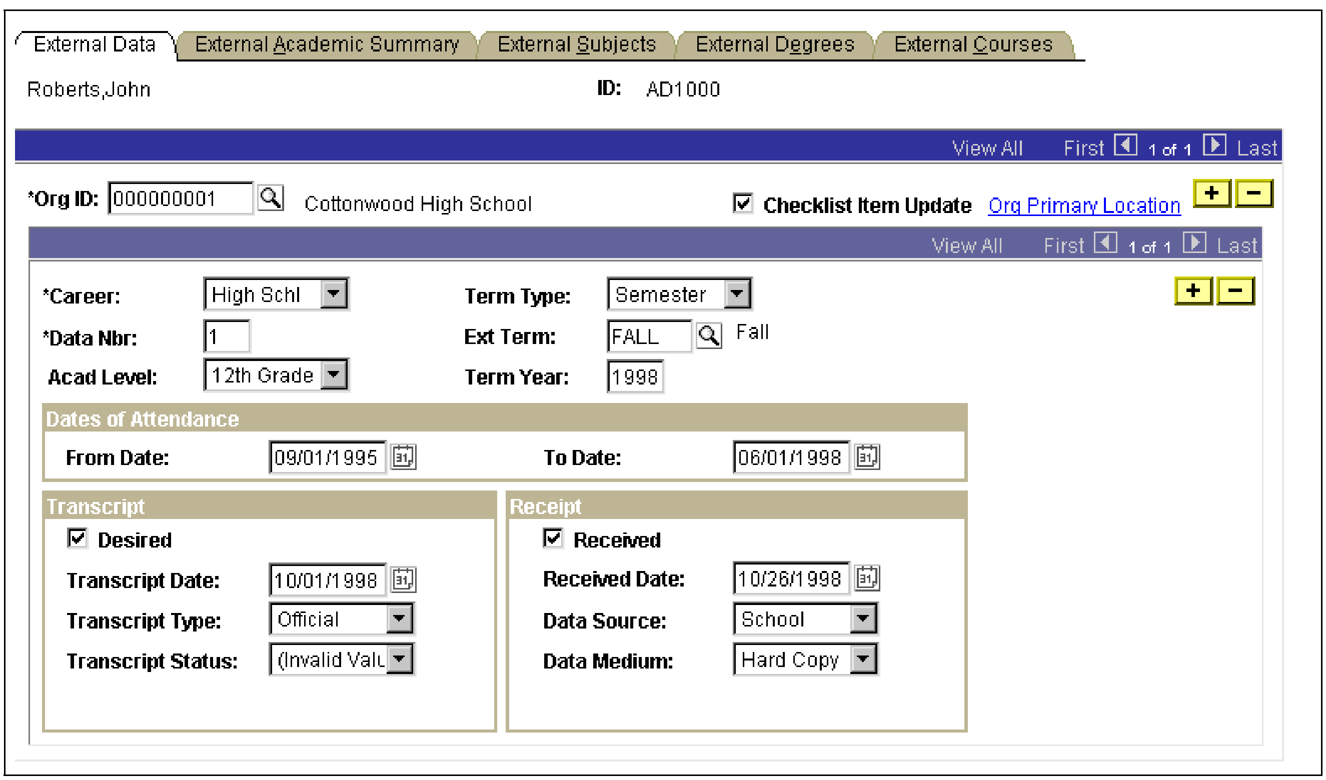
Page Name	Object Name	Navigation	Usage
External Data	EXT_ACAD_DATA	• Develop Enrollment, Evaluate Applicants, Use, Education, External Data • Develop Enrollment, Process External Data, Use A-F, Education, External Data • Develop Enrollment, Process Applications, Use, Education, External Data • Manage Student Records, Process Transfer Credit, Use, Education, External Data • Develop Enrollment, Recruit Prospective Students, Use, Education, External Data	Record information regarding the schools a person has attended.
Organization Primary Location	EXT_ORG_LOC	Click the Org Primary Location link on the Education – External Data page.	View the primary address of the organization.
Organization School Info (organization school information)	SCHOOL_INFO1	Click the Detail button on the Organization Primary Location page to view additional information regarding the school.	View additional information about schools an applicant has attended. Close the Organization School Information page to return to the External Data page.
External Academic Summary	EXTERNAL_ACAD_SUMM	• Develop Enrollment, Evaluate Applicants, Use, Education, External Academic Summary • Develop Enrollment, Process External Data, Use A-F, Education, External Academic Summary • Develop Enrollment, Process Applications, Use, Education, External Academic Summary • Manage Student Records, Process Transfer Credit, Use, Education, External Academic Summary • Develop Enrollment, Recruit Prospective Students, Use, Education, External Academic Summary	Enter external academic summary information.

Page Name	Object Name	Navigation	Usage
External Subjects	EXTERNAL_ACAD_SUBJ	• Develop Enrollment, Evaluate Applicants, Use, Education, External Subjects • Develop Enrollment, Process External Data, Use A-F, Education, External Subjects • Develop Enrollment, Process Applications, Use, Education, External Subjects • Manage Student Records, Process Transfer Credit, Use, Education, External Subjects • Develop Enrollment, Recruit Prospective Students, Use, Education, External Subjects	Enter external subject information.
External Subject Detail	EXT_SUBJ_DETAIL	Click the External Subjects Detail link to open the External Subject Detail page.	Enter details about an external subject area.
Canadian Data	CAN_EXT_ACAD_DATA	Manage Student Records, Process Transfer Credit, Use, Education, Canadian Data	(CAN) Define previous education information for ESIS (Extended Student Information System) reporting.
External Degrees	EXTERNAL_DEGREE	• Develop Enrollment, Evaluate Applicants, Use, Education, External Degrees • Develop Enrollment, Process External Data, Use A-F, Education, External Degrees • Develop Enrollment, Process Applications, Use, Education, External Degrees • Manage Student Records, Process Transfer Credit, Use, Education, External Degrees • Develop Enrollment, Recruit Prospective Students, Use, Education, External Degrees	Enter information about a person's degrees—either those that have been received or those that are still in progress. Fields of study, honors, and degree status are examples of information you might want to record. The system enables you to link degree data on this page to a particular transcript or other type of reported information from the External Data page.

Page Name	Object Name	Navigation	Usage
External Courses	EXT_COURSE	• Develop Enrollment, Evaluate Applicants, Use, Education, External Courses • Develop Enrollment, Process External Data, Use A-F, Education, External Courses • Develop Enrollment, Process Applications, Use, Education, External Courses • Manage Student Records, Process Transfer Credit, Use, Education, External Courses • Develop Enrollment, Recruit Prospective Students, Use, Education, External Courses	Enter detailed course information for an applicant. These might be courses reported on a transcript, self-reported, or reported from another source. Or, you can link courses on this page to a particular transcript or other type of reported information from the External Data page.
External Course Defaults	EXT_COURSE_DEFAULT	Click the Defaults link on the External Courses page.	Enter default data for external courses.

Entering General External Data

Access the External Data page.



Education - External Data page

Org ID (organization ID) The school to which this external data is related. The system automatically populates this field from the Prospect School/Recruiting page or the Application School/Recruiting page if a value was entered in the Last School Attended field on either of those pages when the prospect record or application was initially added to the database. You can edit this field.

Checklist Item Update Select this check box to indicate that the checklist related to this row of external data (or transcript) is updated when the Checklist Item Update Automated process is run. Select this option if the Received check box in the Receipt group box is selected.

Career Select the external career for the external data that you are recording. Values for this field are delivered with your system as translate values. You can modify these translate values.

Data Nbr (data number) The system populates this field automatically. The first data item (or row) you enter is *1.* The system numbers subsequent rows sequentially (*2, 3,* and so on).

If you make a change to the Data Nbr field on this page, click the Save button prior to prompting on theData Nbr field in any of the other pages in the Education component.

Acad Level (academic level) Enter the academic level of the person at the time this data was collected or issued. This level might be different from the person's current level. Values for this field are delivered with your system as translate values. You can modify these translate values.

Term Type Select the term type used by the external organization. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Full Year, Miniterm, Other, Quarter, Quinmester, Semester, Trimester,* and *Unknown.*

This field is optional; you may want to leave it blank until you are ready to enter Transfer Credit information.

Ext Term (external term) Select the external term to which this data relates. For example, if this is a Fall transcript, select *FALL* in the Ext Term field. The values available to you in this field depend on what you entered in the Term Type field. Define external terms on the External Term Table page.

This field is optional; you may want to leave it blank until you are ready to enter Transfer Credit information.

Term Year Enter the appropriate term year pertinent to this external data entry.

This field is optional; you may want to leave it blank until you are ready to enter Transfer Credit information.

From Date and **To Date** Enter the dates that the person attended this school.

Desired Select this check box if you are entering data for a transcript that you requested. The remaining fields in the Transcript group box become available.

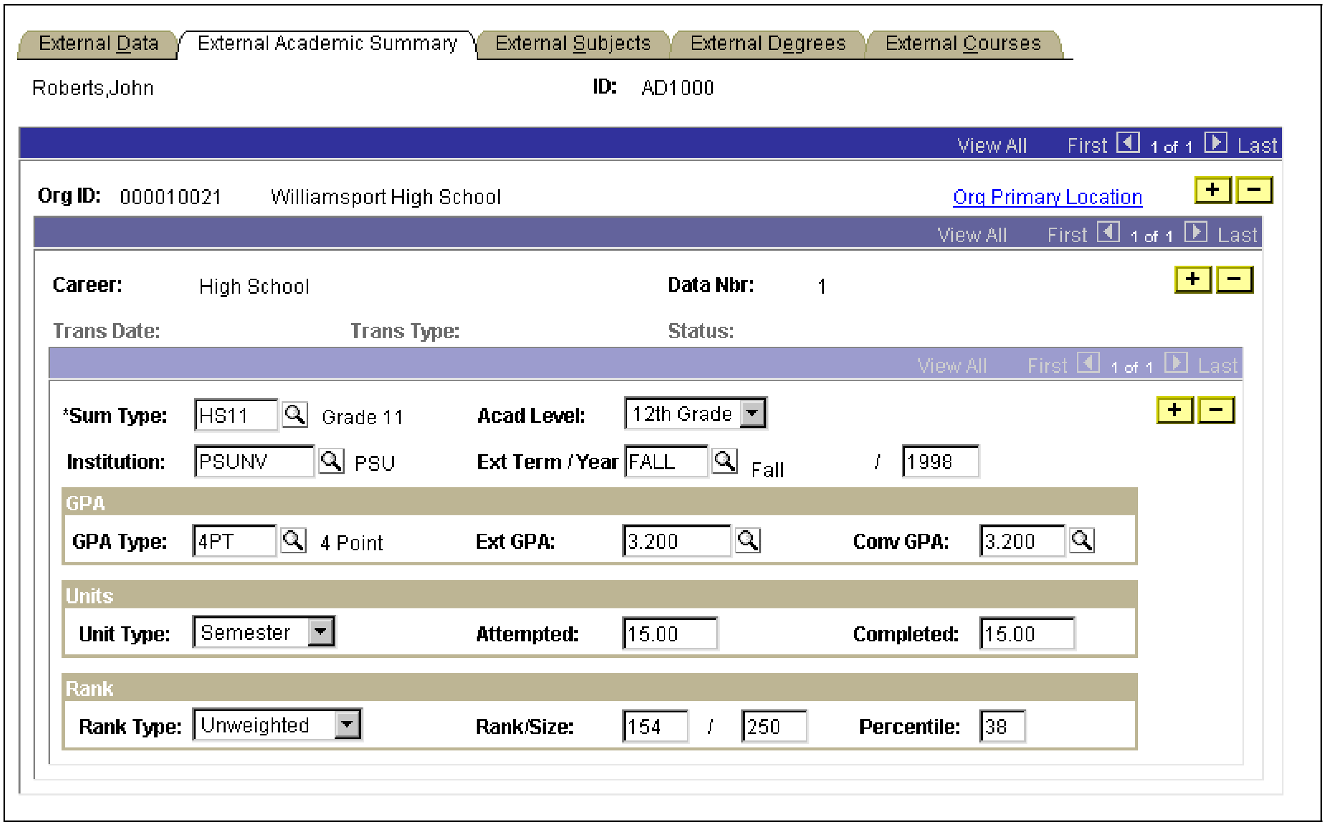
Transcript Date Enter the date that the transcript was issued. The transcript date cannot come after the received date.

Transcript Type	Select a transcript type. Values for this field are delivered with your system as translate values. You can modify these translate values. You can define a user default for this field on the User Defaults 3 page. The user default populates once you select the Desired option.
Transcript Status	Select a transcript status. Values for this field are delivered with your system as translate values. You can modify these translate values. If the Received check box is selected, then the data in this group box can be linked to an application on the Application Materials page.
Received	Select this check box if the data you are entering is for a transcript you have received. The remaining fields in the Receipt group box become available.
Received Date	Enter the date that your office received the transcript. The received date cannot come before the transcript date. When you save the page, the system populates this field, but you can override it.
Data Source	Enter the data source for this transcript. Values for this field are delivered with your system as translate values. You can modify these translate values. You can define a user default for this field. The user default populates once you select the Received check box.
Data Medium	Select the format by which you received the transcript. Values for this field are delivered with your system as translate values. You can modify these translate values. You can define a user default for this field on the User Defaults 3 page. The user default populates once you select the Received check box.
Org Primary Location (organization primary location)	Click to view the primary address of the organization. The Organization Primary Location page appears.

Note. If you are entering two careers, one or both of the Desired or Received check boxes must be selected before saving the page.

Entering and Updating External Academic Summary Information

Access the External Academic Summary page.



Education - External Academic Summary page

You can record GPA (grade point average), units, and rank details for this data, which can be reported on a transcript, self-reported, or reported from another source. You can enter multiple transcripts (or similar data) under an academic institution. The layout of the page enables you to define how you want to represent a person's academic transcripts. You can enter one or more summaries regarding a single transcript. You can record just the summary GPA, units, and rank of a person's entire career; or you can insert rows to create individual summaries that capture data for various segments of a person's academic career. Enter as many summary types as needed. This structure enables you to capture the GPA, rank, and units for each individual year of school, in addition to the overall summary, on one transcript.

Note. The system automatically populates many of the values on this page according to your user defaults and what you entered on the External Data page. If you determined that data from the prospect record be copied to the application (on the Installation Defaults - AD page), some fields are populated from the person's prospect record.

Sum Type (summary type)
: Select the summary type for this external data. For example, this could be an overall summary of an entire high school transcript, or a summary of the 12th grade only. Define summary types on the External Summary Type Table page.

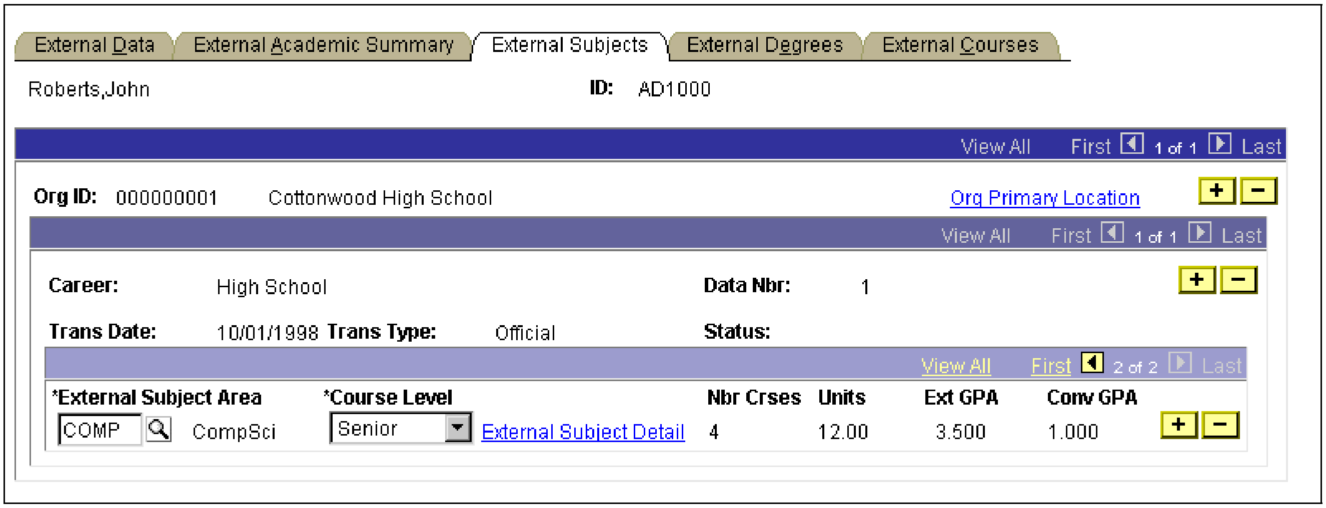
Institution
: The code for your academic institution appears.

Acad Level (academic level)
: Select the academic level of the person at the time this piece of information was current, which might not be the person's current academic level. For example, this could be a summary of a school year the person has completed. Values for this field are delivered with your system as translate values. You can modify these translate values.

Ext Term/Year (external term/year)	Select the external term and year regarding this summary. Define external terms on the External Term Table page.
GPA Type	Select the GPA type used by the school from which the information was received. For example, they can use a 4 point scale or a 100 point scale. Define GPA types on the GPA Type Table page.
Ext GPA (external GPA)	Enter the external GPA from the reported information. If you have defined external GPA values for this GPA type on the GPA Type Table page, you can prompt for those values here. Otherwise, you can type in the appropriate numeric GPA value.
Conv GPA (converted GPA)	When you either navigate to a new page or click the Refresh button, the system automatically converts the GPA if you have defined GPA conversion rules. If you have not specified GPA conversion rules, the GPA that you enter in the External GPA field is copied into the Conv GPA field. The system converts the GPA when you click the Refresh button or when you navigate out of this page.
Unit Type	Select the unit type used by the school on this transcript or reported information. Values for this field are delivered with your system as translate values. You can modify these translate values.
Attempted	Enter the number of units attempted by the person for this summary.
Completed	Enter the number of units completed at the time this summary transcript or reported information was recorded.
Rank Type	Select the rank type. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Unweighted* and *Weighted.*
Rank/Size	Enter the person's rank in their class and the size of the class.
Percentile	When you either navigate to a new page or click the Refresh button, the system automatically calculates the percentile.
Org Primary Location (organization primary location)	Click to view the primary address of the organization for this external academic summary. The Organization Primary Location page appears.

Entering and Updating External Subject Information

Access the External Subjects page.



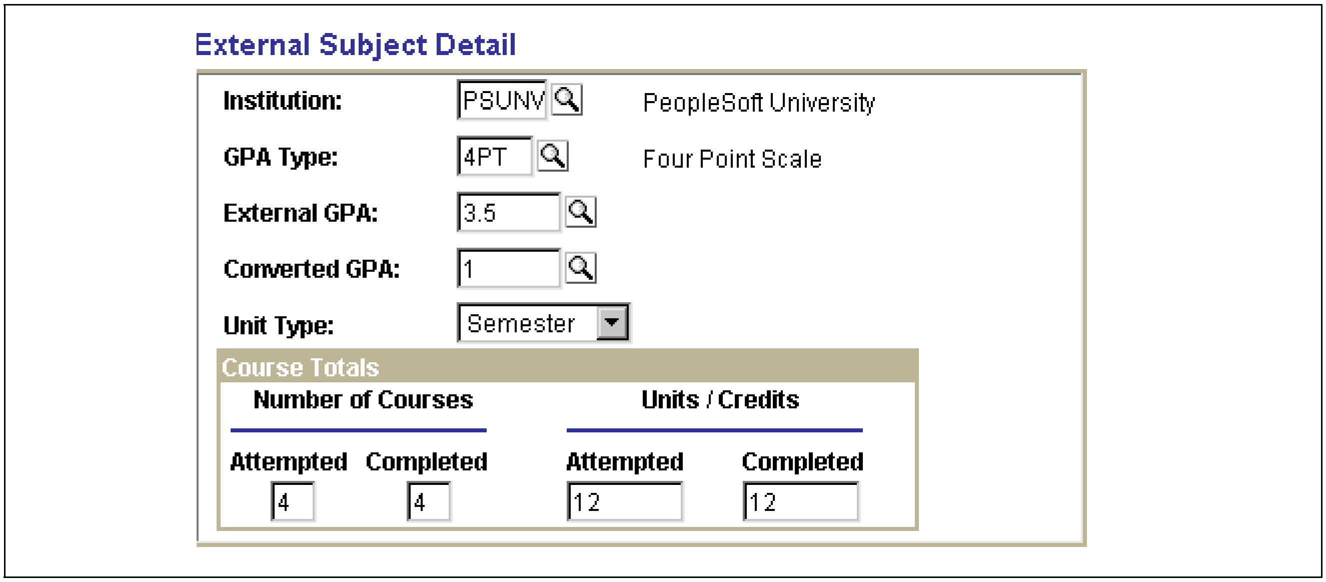
Education - External Subjects page

External subject information can be reported on a transcript, self-reported, or reported from another source. Storing this data is useful for grouping subjects. For example, if your office tracks subject area requirements but does not want to enter or load all of the external courses a student has taken, you can record course level, number of courses, units, external GPA, and converted GPA details about external subject areas.

External Subject Area	Select an external subject area. Define external subjects on the External Subject Table page.
Course Level	Select the course level taken in this area. Values for this field are delivered with your system as translate values. You can modify these translate values.
Nbr Crses (number of courses attempted)	This value populates from the External Subject Detail page.
Units	This value populates from the External Subject Detail page.
Ext GPA (external grade point average)	This value populates from the External Subject Detail page.
Conv GPA	This value populates from the External Subject Detail page.
Org Primary Location (organization primary location)	Click to view the primary address of the organization where these external subject areas were taken. The External Subject Detail page appears.
External Subject Detail	Click to enter details about an external subject area. The External Subject Detail page appears.

Entering External Subject Area Details

Access the External Subject Detail page.



External Subject Detail page

Institution	The code for your academic institution appears.
GPA Type	Select the GPA type for the school the person attended. Define GPA types on the GPA Type Table page.
External GPA	Enter the external GPA earned by the applicant for this subject. If you have defined external GPA values for this GPA type on the GPA Type Table page you can prompt for those values here. Otherwise, type in the appropriate GPA value.
Converted GPA	The system automatically converts the GPA if you have defined GPA conversion rules. If you have not specified GPA conversion rules, the system copies the GPA that you enter in the External GPA field into the Converted GPA field.
Unit Type	Select a unit type. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Adult, Carnegie, CEU, No Credit, Other, Quarter, Semester, Units, Unknown,* or *Vocational.*
Number of Courses, Attempted, and **Completed**	Enter the number of courses the person attempted and completed.
Units/Credits, Attempted, and **Completed**	Enter the number of units or credits the person attempted and completed.

(CAN) Entering and Updating ESIS Data

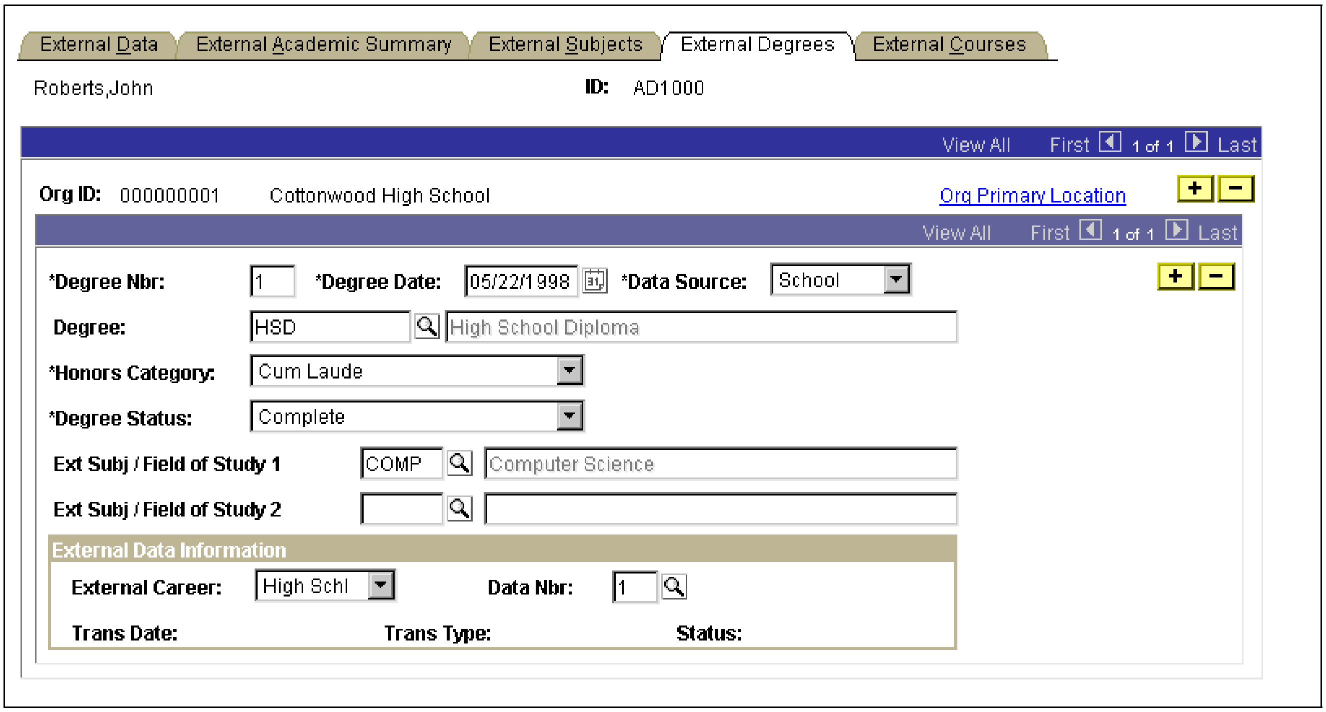
Access the Canadian Data page.

Previous Educational Activity	Enter the most recent educational activity of the student.

Previous PostSecond Credential (previous postsecondary credential)
Enter the type of credential associated with successful completion of the student's most recent postsecondary education.

Entering and Updating External Degrees

Access the External Degrees page.



Education - External Degrees page

Degree Nbr (degree number)
The system populates this field automatically. The first data item (or row) you enter is *1.* The system numbers subsequent rows sequentially (*2, 3,* and so on).

Degree Date
Enter the date this degree was or will be granted.

Data Source
Enter the data source for this degree information. Values for this field are delivered with your system as translate values. You can modify these translate values.

Degree
Select the external degree that the person received or that is still in progress. The system populates the description automatically. Define degrees on the Degree Table page.

If you want to enter a degree that is not defined in the Degree Table page, leave the Degree field blank, and type in the appropriate information in the description field to the right of the Degree field.

Honors Category
Select an honors category if the person received an honor for this degree. Values for this field are delivered with your system as translate values. You can modify these translate values.

Degree Status — Select the degree status. Values for this field are delivered with your system as translate values. You can modify these translate values.

Ext Subj (external subject) and **Field of Study 1** and **2** — Select an external subject or field of study if the person had a subject or field of study concentration for this degree. Define external subjects on the External Subject Table page. However, if you must enter an external subject area not defined in your system, leave the field blank and tab to the related description field and enter any text desired.

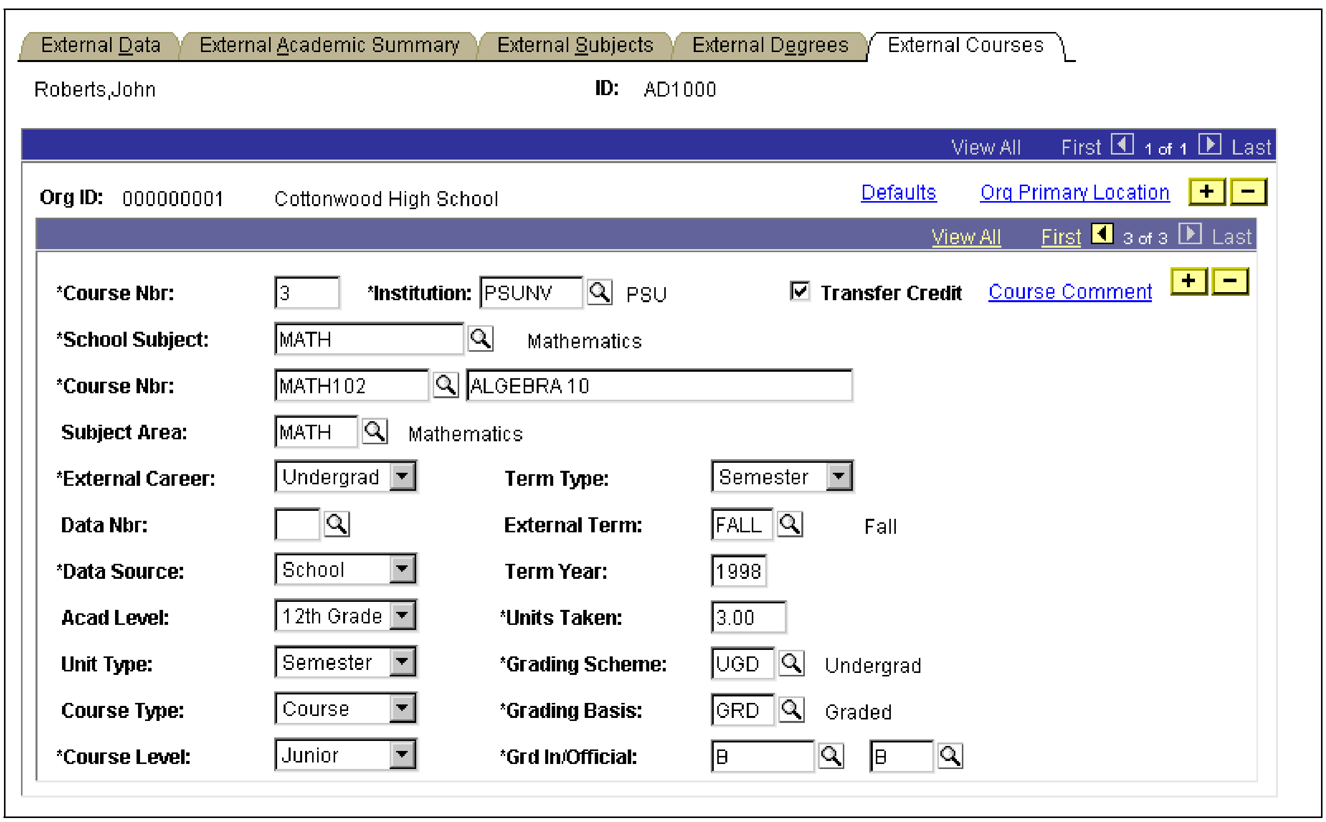
External Career — Select the person's external career for this degree. Values for this field are delivered with your system as translate values. You can modify these translate values.

Data Nbr (data number) — If this degree information is related to a particular transcript or source of information, enter the data number of the transcript or other source. This field populates from the External Data page. You cannot link to a *newly entered* data number until the External Data page has been saved.

Org Primary Location (organization primary location) — Click to view the primary address of the school to which this degree is related. The Organization Primary Location page appears.

Entering and Updating External Courses

Access the External Courses page.



Education - External Courses page

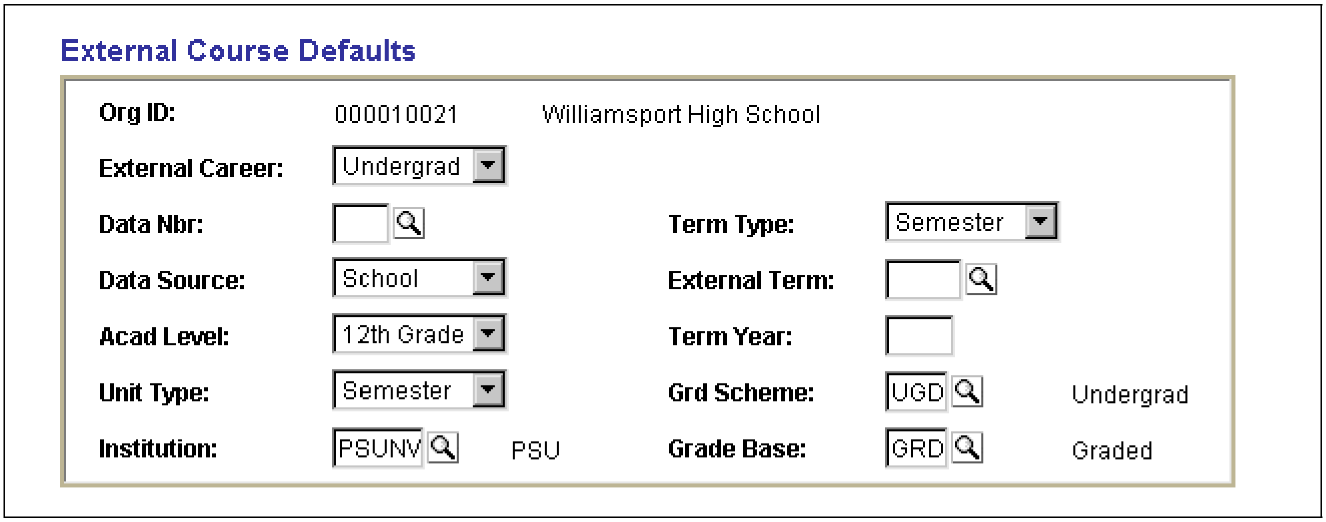
Important! If you have more than one course to enter, click the Defaults link to enter information common to each course. This will save you data entry time.

Course Nbr (course number)	The system populates this field automatically. The first data item (or row) you enter is *1.* The system numbers subsequent rows sequentially (*2, 3,* and so on).
Institution	The code for your academic institution appears.
Transfer Credit	Select this check box if you want the system to consider the external course information to be transfer credit. The system includes this course in its transfer credit process.
School Subject	Select the subject of the course you are entering. If you have a course catalog for this school set up in the system, you can prompt for valid values on this field. If a course catalog does not exist for this school, type in the subject.
Course Nbr (course number)	Select the school course number of this course. If a course catalog has been set up for this school, you can prompt for valid values on this field. If a course catalog does not exist for this school, type in the course number. The description of the course displays if linked to a course catalog. If the course catalog is not linked, type in the description of this course.
Subject Area	Select the external subject area to which this course belongs. Subject areas are a way of identifying common subjects with different titles. For example, similar subjects offered at external schools could have diverse titles such as “Creative Writing,” “Writing Fiction,” and “Free Writing.” You can link a common external subject area you define as “Writing,” to all of these subjects. Define external subject areas on the External Subject Table page.
External Career	The external career populates automatically from the School Data page for this organization. Edit the field if necessary.
Data Nbr (data number)	If this course information is linked to a row of data, such as a transcript on the External Data page, enter the data number from that page. When you tab out of this field, the remaining fields populate automatically from the data linked to this data number. If the courses you are entering are *not* linked to a data number, skip this field and complete the remaining fields. **Note.** The *newly entered* data number values are not available until they have been saved on the External Data page.
Data Source	Select the data source for this course information. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Level (academic level)	Select the person’s academic level at the time these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values.
Unit Type	Select the unit type for these courses. Values for this field are delivered with your system as translate values. You can modify these translate values.

Course Type	Select the course type defining this course. Values for this field are delivered with your system as translate values. You can modify these translate values.
Course Level	Select the course level of this course. Values for this field are delivered with your system as translate values. You can modify these translate values.
Transfer Credit Type	This field appears only if your system installation country equals *CAN.* Indicate the type of transfer credit for the student. Your choices are *Dom Exch, Foreign Ex, More than 1, No Permiss, Other, PLA/Skill, Unknown,* and *W/Permiss.*
Term Type	Select the term type used by the school where these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values. Depending on the term type entered, you must either fill in a begin date and end date or an external term and term year.
External Term	Select the external term in which these courses were taken. The values available to you in this field depend on what you have entered in the Term Type field. Define external terms on the External Term Table page.
Term Year	Enter the term year during which these courses were taken.
Units Taken	Enter the number of units taken for this course.
Grading Scheme	Select the grading scheme you want to use to convert the external school's grading scheme to your standards. Define grading schemes on the Grading Scheme Table page.
Grading Basis	Select a grading basis for the grading scheme. The values available depend on what grading scheme you enter.
Grd In/Official (grading in/official)	Select the grade the applicant earned in this course. The values available for this field are determined by the grading scheme. When you click the Refresh button or navigate out of this page, the system converts the grade according to your grading scheme definition and displays in the field to the right of the Grd In/Official field.
Defaults	To enter a group of courses with different default information for this same school and person, save the page, then click the Defaults button to return to the External Course Defaults page and enter new default information.
Org Primary Location (organization primary location)	Click to view the primary address of the school to which this degree is related. The Organization Primary Location page appears.

Entering External Course Default Data

Access the External Course Defaults page.



External Course Defaults page

External Career

The external career populates automatically from the School Data page for this organization. Edit this field if necessary.

Data Nbr (data number)

If this course information is linked to a row of data, such as a transcript on the External Data page, enter the data number from that page. When you navigate out of this field, the remaining fields populate automatically from the data linked to this data number. If the courses you are entering are *not* linked to a data number, skip this field and complete the remaining fields.

Note. The *newly entered* data number values are not available until they have been saved on the External Data page.

Data Source

Select the data source for this course information. Values for this field are delivered with your system as translate values. You can modify these translate values.

Acad Level (academic level)

Select the person's academic level at the time these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values.

Unit Type

Select the unit type for these courses. Values for this field are delivered with your system as translate values. You can modify these translate values.

Institution

The code for your academic institution appears.

Term Type

Select the term type used by the school where these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values. Depending on the term type entered, you must either fill in a begin date and end date or an external term and term year.

External Term

Select the external term in which these courses were taken. The values available to you depend on what you have entered in the Term Type field. Define external terms on the External Term Table page.

Term Year

Enter the term year during which these courses were taken.

Grd Scheme (grading scheme) — Select the grading scheme you want to use to convert the external school's grading scheme to your standards. Define grading schemes on the Grading Scheme Table page.

Grade Base — Select a grade base for the grading scheme. The values available depend on what grading scheme you have entered.

Note. Values for data entered on the External Course Defaults page automatically appear on the External Courses page.

Viewing Summary Education Data for Prospects and Applicants

Use the Education Summary component to look up summaries of external education information stored for prospects and applicants.

This section discusses how to:

- View external academic summary information.
- View external subject summary information.
- View external degree summary information.
- View external course summary information.

Pages Used to View Summary Education Data for Prospects and Applicants

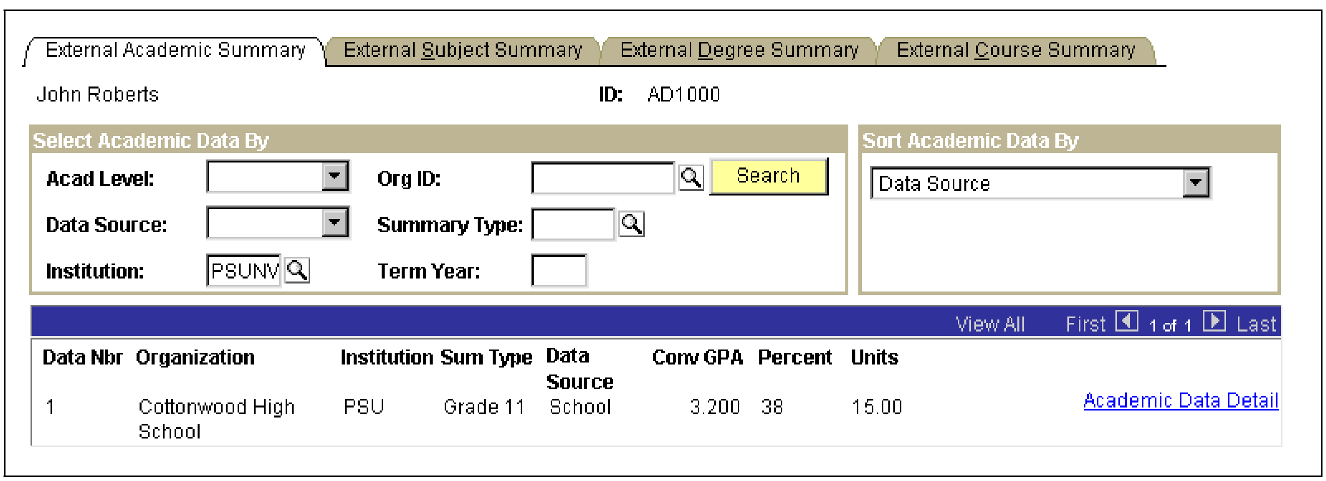
Page Name	Object Name	Navigation	Usage
External Academic Summary	EXT_ACAD_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Education Summary, External Academic Summary • Develop Enrollment, Process Applications, Inquire, Education Summary, External Academic Summary • Develop Enrollment, Recruit Prospective Students, Inquire, Education Summary, External Academic Summary	View a person's external academic summary information displayed in the order you designate. You can access this page for prospects and for applicants.
Transcript Data	TRANSCRIPT_SEC1	Click the Transcript Data link on the External Academic Summary page.	View details about an external academic entry.

Page Name	Object Name	Navigation	Usage
Academic Data Detail	EXT_ACAD_SEC	Click the Academic Data Detail link on the External Academic Summary page.	View further details about a transcript.
External Subject Summary	EXT_SUBJ_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Education Summary, External Subject Summary • Develop Enrollment, Process Applications, Inquire, Education Summary, External Subject Summary • Develop Enrollment, Recruit Prospective Students, Inquire, Education Summary, External Subject Summary	View summaries of a person's external subject matter displayed in the order you designate. You can access this page for prospects and for applicants.
Transcript Data	TRANSCRIPT_SEC2	Click the Transcript Data link on the External Subject Summary page.	View further details about an external academic entry.
Academic Subject Detail	EXT_SUBJ_SUM_SEC	Click the Academic Subject Detail link on the External Subject Summary page.	View further details about an external subject summary.
External Degree Summary	EXT_DEGREE_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Education Summary, External Degree Summary • Develop Enrollment, Process Applications, Inquire, Education Summary, External Degree Summary • Develop Enrollment, Recruit Prospective Students, Inquire, Education Summary, External Degree Summary	View a person's external degree summary information displayed in the order you designate. You can access this page for prospects and for applicants.
Transcript Data	TRANSCRIPT_SEC3	Click the Transcript Data link on the External Degree Summary page.	View further details about an external academic entry.

Page Name	Object Name	Navigation	Usage
External Course Summary	EXT_COURSE_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Education Summary, External Course Summary • Develop Enrollment, Process Applications, Inquire, Education Summary, External Course Summary • Develop Enrollment, Recruit Prospective Students, Inquire, Education Summary, External Course Summary	View a person's external course summary information displayed in the order you designate. You can access this page for prospects and for applicants.
Transcript Data	TRANSCRIPT_SEC4	Click the Transcript Data link on the External Course Summary page.	View further details about an external academic entry.
External Course Detail	EXT_COURSE_DTL	Click the External Course Detail link to view on the External Course Summary page.	View further details about External Course summary information.

Viewing External Academic Summary Information

Access the External Academic Summary page.



External Academic Summary page

To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Select the following criteria for which you want to search for external academic summary information: academic level, data source, academic institution, organization ID, summary type and term year.

Sort Academic Data By Select which sort order you prefer. A person can have multiple rows of data (such as official 10th grade, official 11th grade, and so on). Sort order enables you to decide how you want to view the data.

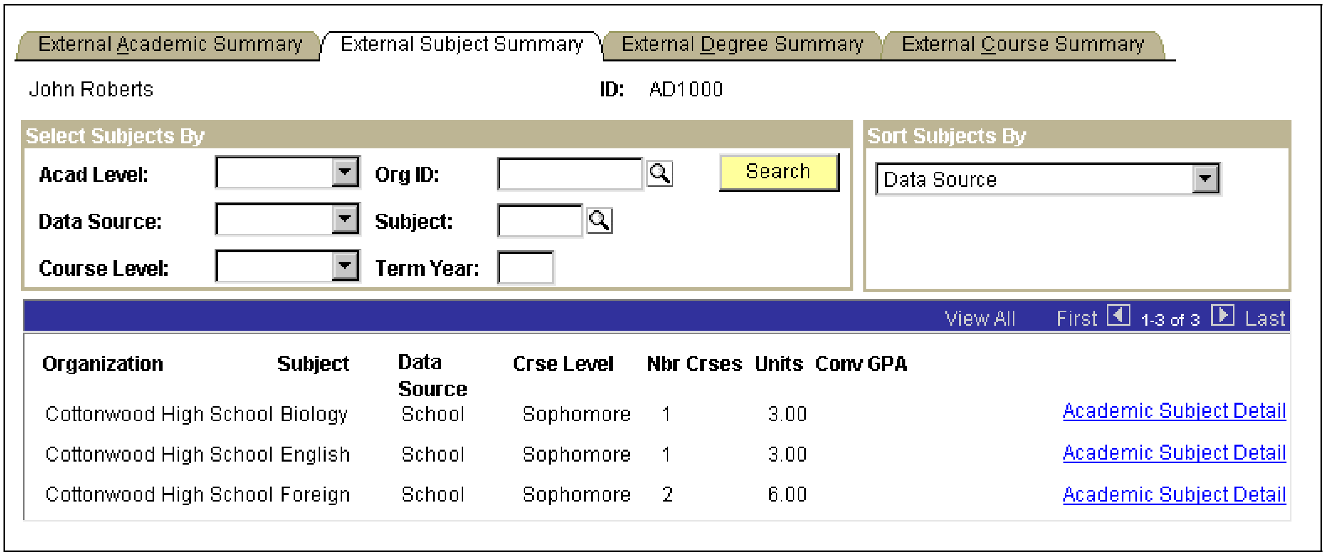
Search Click to bring up information matching your search and sort criteria.

Transcript Data If an external academic entry is from a transcript, click this link to view details about the transcript. The Transcript Data page appears.

Academic Data Detail Click to view additional details about a transcript. The Academic Data Detail page appears.

Viewing External Subject Summary Information

Access the External Subject Summary page.



External Subject Summary page

To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Select the following criteria for which you want to search for external subject summary information: academic level, data source, course level, organization ID, subject, and term year.

Sort Subjects By Select which sort order you prefer. A person can have multiple rows of data (such as math, English, and so on). Sort order enables you to decide how you want to view the data.

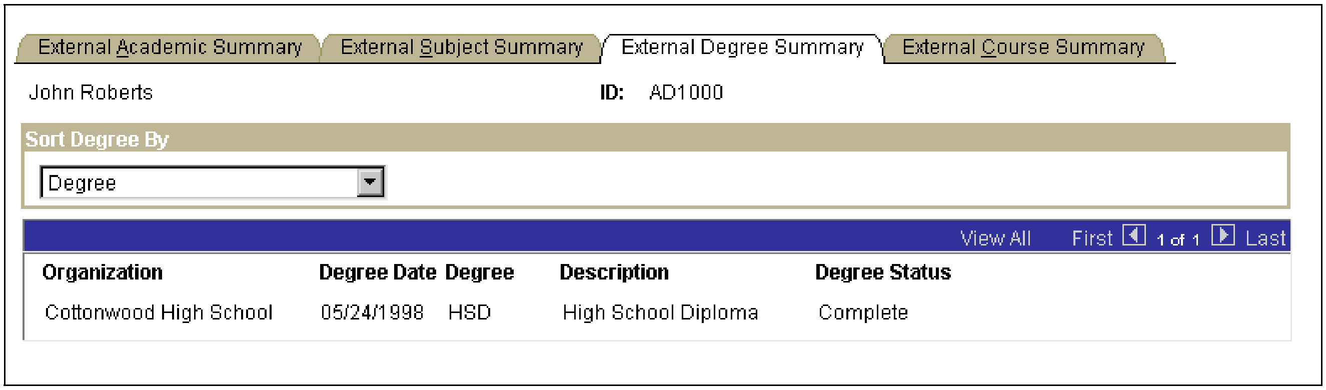
Search Click to bring up information matching your search and sort criteria.

Transcript Data If an external subject summary is from a transcript, click this link to view details about the transcript. The Transcript Data page appears.

Academic Subject Detail Click to view further details about an external subject summary. The Academic Subject Detail page appears.

Viewing External Degree Summary Information

Access the External Degree Summary page.



External Degree Summary page

To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Sort Degree By

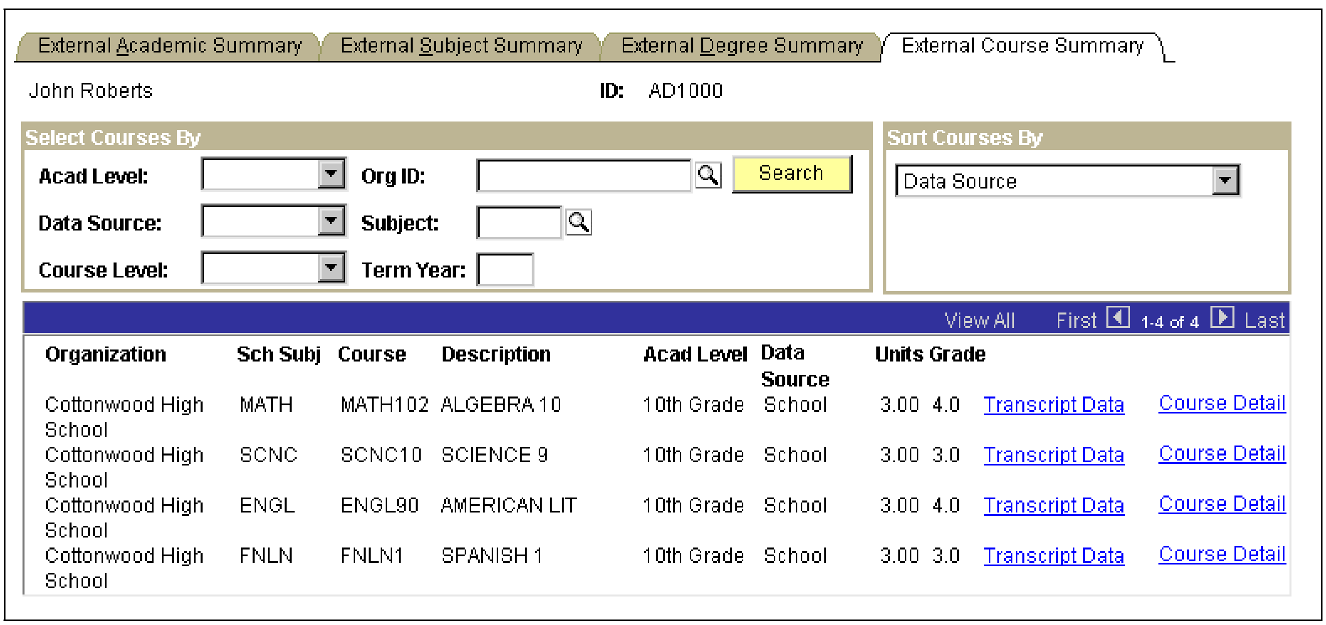
Indicate the order in which you want to view degree information. For example, you can view the data by *Degree, Trans Date* (transcript date), or *(none)*.

Transcript Data

If an external degree summary is from a transcript, click this link to view details about the transcript. The Transcript Data page appears.

Viewing External Course Summary Information

Access the External Course Summary page.



External Course Summary page

To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Select the following criteria for which you want to search for external course summary information: academic level, data source, course level, organization ID, subject, and term year.

Sort Course By	Select which sort order you prefer. A person can have multiple rows of data (such as ENGL101, MATH125, and so on). Sort order enables you to decide how you want to view the data.
Search	Click to bring up information matching your search and sort criteria.
Transcript Data	If this course information is from a transcript, click this button to view details about the transcript.
External Course Detail	Click to view further details about external course summary information. The External Course Detail page opens.

CHAPTER 12

Tracking General Materials for Prospects and Applicants

This chapter discusses how to:

- Enter general materials for prospects and applicants.
- View summary application materials information.

Entering General Materials for Prospects and Applicants

This section discusses how to:

- Enter general materials.
- Add details about the recommender.
- View general materials summary information for prospects and applicants.
- Associate supporting materials to an application manually.
- Link general materials to applications.

Pages Used to Enter General Materials for Prospects and Applicants

Page Name	Object Name	Navigation	Usage
General Materials	GENL_MATERIALS	• Develop Enrollment, Evaluate Applicants, Use, General Materials, General Materials • Develop Enrollment, Process Applications, Use, General Materials, General Materials • Develop Enrollment, Recruit Prospective Students, Use, General Materials, General Materials	Enter supporting information for prospects and applications. The type of information you record here is that information defined as a general material type. For example, PeopleSoft considers essays, portfolios, recommendations and interviews general materials. General material data is linked to a *person,* so anything entered here can be considered when evaluating any application for this person. Once general materials are recorded here, they can be linked to applications and evaluations.
Recommender Information	ORG_DATA_PANEL	Click the Recommender Information link on the General Materials page.	Add details about the recommender.
Address Information	ADDR_INFO_PANEL	Click the Address Information link on the General Materials page.	View, add, or edit a recommender's mailing address. If you chose an address location on the Recommender Information page, then that address is automatically filled in here. Otherwise, fill in the mailing address information you have for this recommender. Note that if this is an address of an organization, any changes here do not affect addresses stored elsewhere in the system for the school or organization with which this recommender is affiliated.

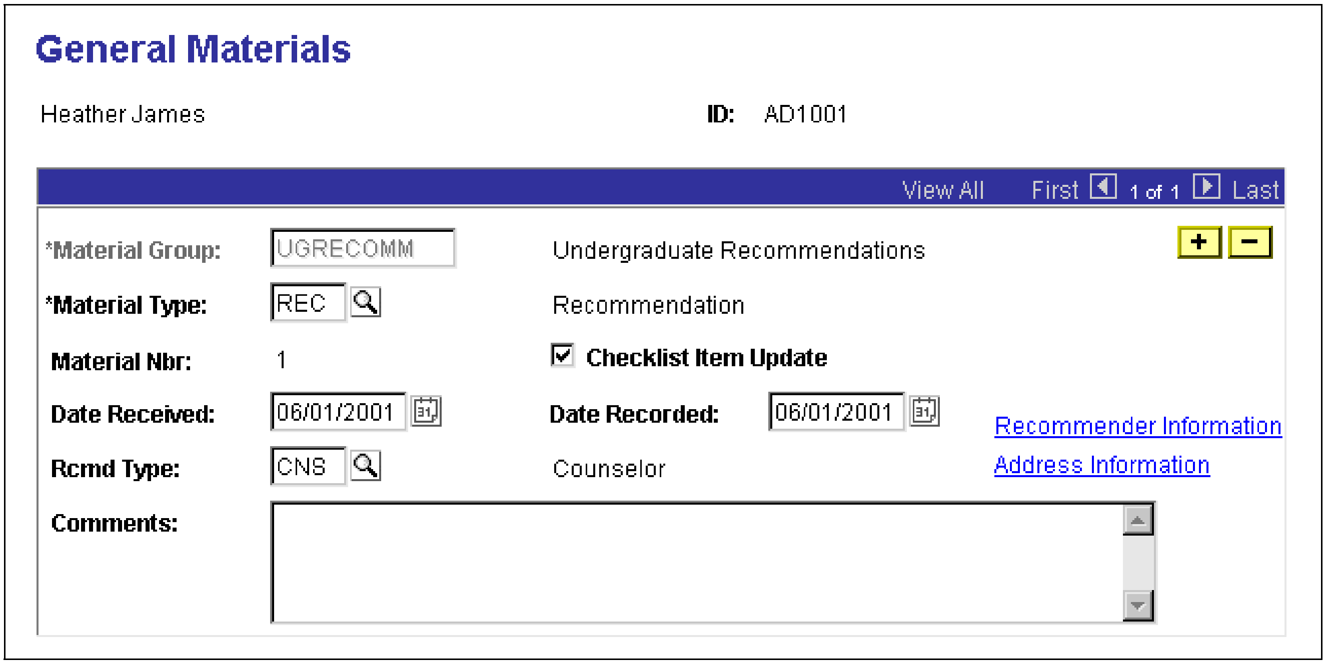
Page Name	Object Name	Navigation	Usage
General Materials Summary	GENL_MATL_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, General Materials Summary, General Materials Summary • Develop Enrollment, Process Applications, Inquire, General Materials Summary, General Materials Summary • Develop Enrollment, Recruit Prospective Students, Inquire, General Materials Summary, General Materials Summary	Look up any general materials stored for a person. You can display the information by material group or material type.
Recommender	RECOMMENDER_SEC1	Click the Recommender link on the General Materials Summary page.	View further details about general materials summary information. This Recommender Detail page is available with a *Recommendation* material type entry.
Application Materials	ADM_APPL_MATL	• Develop Enrollment, Evaluate Applicants, Use, Application Materials, Application Materials • Develop Enrollment, Process Applications, Use, Application Materials, Application Materials	Manually associate application materials to an application. This information is stored elsewhere in the database associated with a person; you link only the pertinent data to an application on this page.
Select Test Scores	APPL_SCORES_SP	After choosing a test score material group, click the Test Scores link on the Application Materials page.	View test scores associated with this applicant. Select the test IDs that you want to link to this application. All tests stored for this person that are not already linked to this application are available on this page. Choose only those tests that are relevant to this material group and application. You can enter tests for a person on the Test Results page.

Page Name	Object Name	Navigation	Usage
Select Academic Summary Data	APPL_ACAD_SUMM_SP	After choosing an academic summary material group, click the Academic Summary link on the Application Materials page.	Link an academic summary group to this application. Select the academic summaries you want to link to this application. All academic summaries stored for this person that are not already linked to this application are available on this page. Choose only those academic summaries that are relevant to this material group and application. You can enter academic summaries for a person on the External Academic Summary page.
Select External Courses	APPL_COURSE_SP	After you choose an external course material group, click the External Courses link on the Application Materials page.	Link external courses to this application. Select the external courses you want to link to this application. All external courses stored for this person that are not already linked to this application are available on this page. Choose only those external courses that are relevant to this material group and application. You can enter external courses for a person on the External Courses page.
Select External Subject	APPL_SUBJECTS_SP	After you choose an external subjects material group, click the External Subjects link on the Application Materials page.	Link external subjects to this application. Select the external subjects you want to link to this application. All external subjects stored for this person that are not already linked to this application are available on this page. Choose only those external subjects that are relevant to this material group and application. You can enter external subjects for a person on the External Subjects page.

Page Name	Object Name	Navigation	Usage
Select Transcripts	APPL_TRANSCRIPT_SP	After you choose a transcripts material group, click the Transcripts link on the Application Materials page.	Link transcripts to this application. Select the transcripts you want to link to this application. All transcripts stored for this person that are not already linked to this application are available on this page. Choose only those transcripts that are relevant to this material group and application. You can enter transcript information for a person on the External Data page.
Select General Materials	APPL_MATL_SP	Click the General Materials link on the Application Materials page.	Link general materials to this application. Select only those general materials you want to link to this application. All general materials stored for this person that are not already linked to this application are available on this page. You can enter general materials for a person on the General Materials page.
Recommender Detail	INTERVIEWER_SEC2	Click the Recommender Detail link on the Select General Materials page.	View information about an interviewer or a recommender.

Entering General Materials

Access the General Materials page.



General Materials page

Note. The fields on this page vary depending on the material group type you choose. The material data attached to this type dictates what fields are available. For example, the Recommender Information and Address Information links enable you to enter information about recommenders and their addresses. However, these links appear on the page only when the material type is *REC* (recommendation).

Material Group

Select the material group that you are associating with this person. Only material groups that include a material type that is marked “General Material” are available to select. Define material groups on the Material Group Table page.

Material Type

Select a material type. Only general material types from this material group are available. Material types are associated with groups on the Material Group Table page.

Material Nbr (material number)

This display-only field shows which general material entry you are viewing for this person. For example, the first general material entry is number *1,* the second is number *2,* and so on.

Checklist Item Update

When you add a new material group row, the system selects this check box. This check box indicates that the checklist related to this row of general material data is updated when you run the Checklist Item Update Automated process.

Date Received

The default for the date received is your system date. Edit this field if necessary.

Date Recorded

The default for the date recorded is your system date. Edit this field if necessary.

Rcmnd Type (recommender type)

The remaining fields you see depend on the variable data associated with the material type selected. In our example, you next fill in the recommender type. Values for this field are delivered with your system as translate values. You can modify these translate values.

Comments	Enter any notes or text for this general materials entry.
Recommender Information	This link appears when you select the Recommender material type. Click this link to add details about the recommender. The Recommender Information page appears.
Address Information	This link appears when you select the Recommender material type. Click this link to view, add, or edit the mailing address for this recommender. The Address Information page appears.

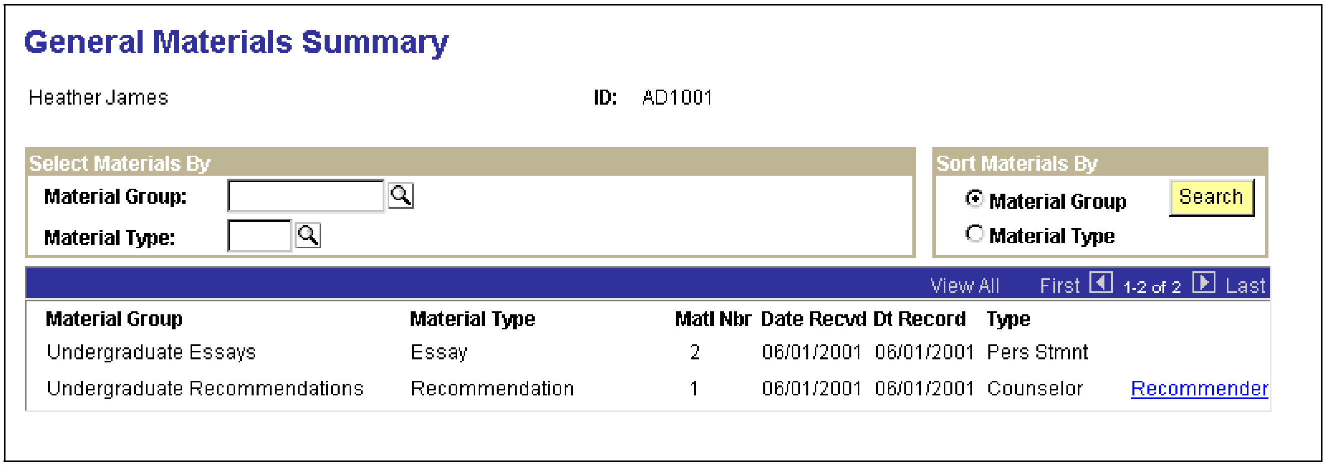
Adding Details About the Recommender

Access the Recommender Information page.

ID	If this recommender is in your database, select the person's ID.
Name	If you selected an ID, the recommender's name automatically appears. If you did not select an ID because this recommender is not in your database, type in the recommender's name.
Title	Enter the recommender's title.
Org ID (organization identification)	If the recommender is affiliated with a school or organization in your database, select the organization ID. The name of the organization automatically appears. Leave this field blank if the recommender is not associated with a school or organization in your database and type in the name of the organization.
Location	If you entered an organization ID, you can choose any defined address for the organization or school you want to use as a mailing address for the recommender.
Org Name (organization name)	The system automatically populates the organization name if you enter an organization ID. Type in the organization name if the organization does not already exist in your database.

Viewing General Materials Summary Information for Prospects and Applicants

Access the General Materials Summary page.



General Materials Summary page

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

Select Materials By

Material Group Select a material group to search for a summary of general materials for this person based on material group.

Material Type Select a material type to search for a summary of general materials for this person based on material type.

Sort Materials By

Material Group Select a material group to sort the findings by material group.

Material Type Select a material type to sort the findings by material type.

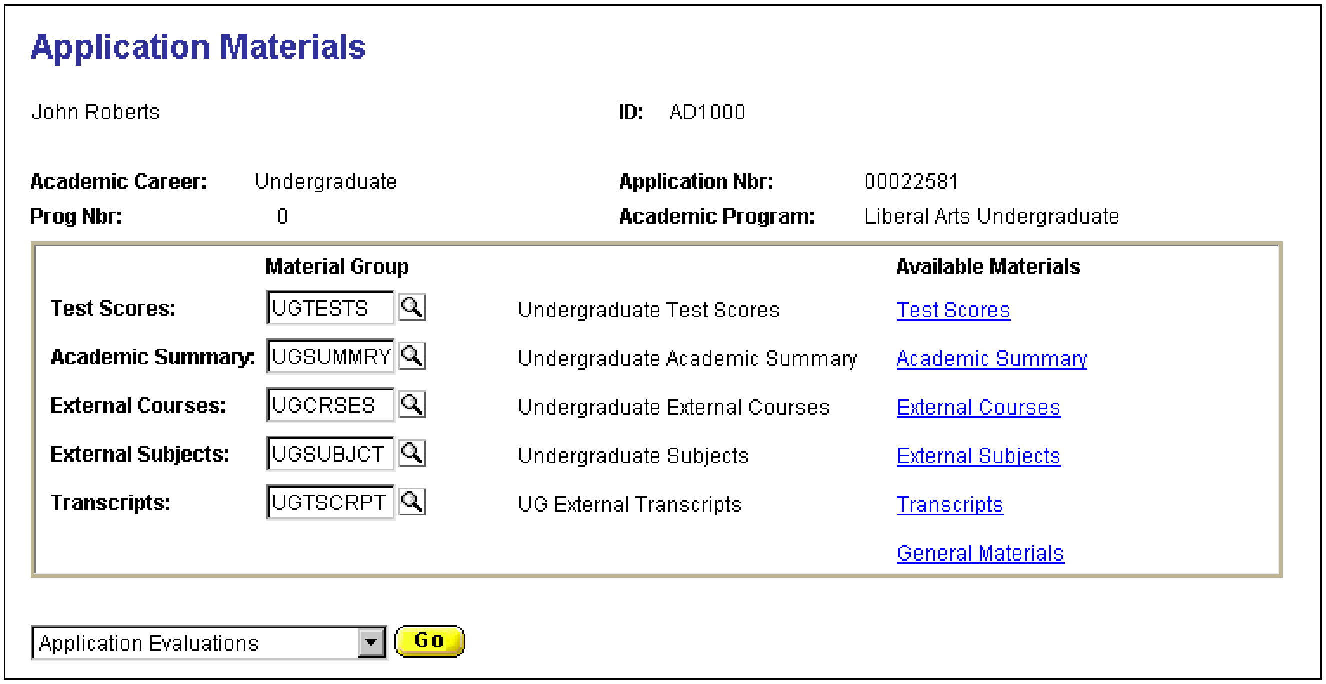
Search Click to bring up information matching your search criteria.

Other Page Elements

Recommender Click to view additional details about general materials summary information for a particular row.

Associating Supporting Materials to an Application Manually

Access the Application Materials page.



Application Materials page

An application for this person must already exist.

Test Scores

To link a test score group to this application, select a material group for the test scores material type. The groups available are only those that include a test scores material type. Define material groups on the Material Group Table page.

Once you have chosen a test score material group, click the Test Scores link to view a list of test scores associated with this applicant. The Select Test Scores page appears.

Academic Summary

To link an academic summary group to this application, select a material group for the academic summary material type. The groups available are only those that include an academic summary material type.

After you have chosen an academic summary material group, click the Academic Summary link to view a list of academic summaries associated with this applicant. The Select Academic Summary Data page appears.

External Courses

To link an external course group to this application, select a material group for the external courses material type. The groups available are only those that include an external courses material type.

After you choose an external course material group, click the External Courses link to view a list of external courses associated with this applicant. The Select External Courses page appears.

External Subjects

To link an external subject group to this application, select a material group for the external subjects material type. The groups available are only those that include an external subjects material type.

After you choose an external subjects material group, click the External Subjects link to view a list of external courses associated with this applicant. The Select External Subjects page appears.

Transcripts To link transcripts to this application, select a material group for the transcripts material type. The groups available are only those that include a transcripts material type.

After you choose a transcripts material group, click the Transcripts link to view a list of transcripts associated with this applicant. The Select Transcripts page appears.

General Materials Click to link general materials to this application. The Select General Materials page appears, where you can view a list of general materials associated with this applicant.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

See Also

Chapter 20, "Evaluating Applicants Using Automatic Processing," Assigning Evaluation Codes to Applications in Batch, page 378

Linking General Materials to Applications

Access the Select General Materials page.

Recommender Detail If a general material entry has a person linked to it, such as an interviewer or a recommender, you can click the Recommender Detail link to view information about that person, as shown in the following page example.

Viewing Summary Application Materials Information

This section discusses how to:

- View materials summary information.
- View academic summary information.
- View academic subjects summary information.
- View course summary information.

See Also

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 101

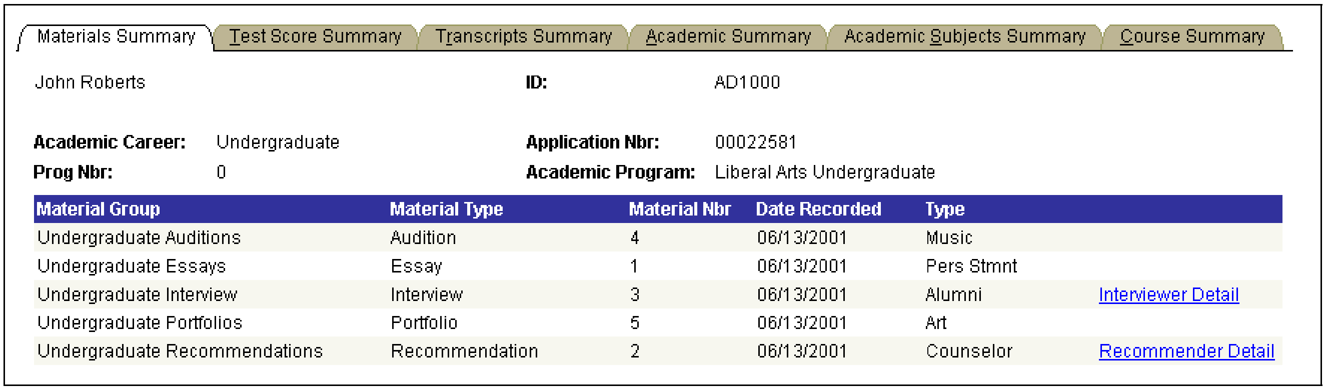
Pages Used to View Summary Application Materials Information

Page Name	Object Name	Navigation	Usage
Materials Summary	APPL_MATL_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Application Materials Summary, Materials Summary • Develop Enrollment, Process Applications, Inquire, Application Materials Summary, Materials Summary	View summary information regarding materials assigned to a person, and associated with a particular application and academic program.
Interviewer Detail	INTERVIEWER_SEC	Click the Interviewer Detail link on the Materials Summary page.	View additional interview information.
Recommender Detail	RECOMMENDER_SEC	Click the Recommender Detail button on the Materials Summary page.	View additional recommender information.
Test Score Summary	APPL_TEST_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Application Materials Summary, Test Score Summary • Develop Enrollment, Process Applications, Inquire, Application Materials Summary, Test Score Summary	View summary information regarding test scores associated with a particular application and academic program.
Transcripts Summary	APPL_TRNS_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Application Materials Summary, Transcripts Summary • Develop Enrollment, Process Applications, Inquire, Application Materials Summary, Transcripts Summary	View summary information regarding transcripts associated with a particular application and academic program.
Academic Summary	APPL_SUMM_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Application Materials Summary, Academic Summary • Develop Enrollment, Process Applications, Inquire, Application Materials Summary, Academic Summary	View academic summary information associated with a particular application and academic program. You can view the data in a variety of ways, depending on your selection criteria.

Page Name	Object Name	Navigation	Usage
Application Summary Detail	APPL_SUMM_SEC	Click the App Summary Detail link on the Academic Summary page to bring up the Application Summary Detail page.	View application detail information.
Academic Subjects Summary	APPL_SUBJ_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Application Materials Summary, Academic Subjects Summary • Develop Enrollment, Process Applications, Inquire, Application Materials Summary, Academic Subjects Summary	View summary information regarding academic subjects associated with a particular application and academic program.
Academic Subject Detail	APPL_SUBJ_SUM_SEC	Click the Acad Subject Detail button on the Academic Subjects Summary page to bring up the Application Subject Detail page.	View application subject information.
Course Summary	APPL_CRSE_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Application Materials Summary, Course Summary • Develop Enrollment, Process Applications, Inquire, Application Materials Summary, Course Summary	View summary information regarding courses associated with a particular application and academic program.
Transcript Data	APPL_CRSE_TRAN_SEC	Click the Transcript Data link to open the Transcript Data page.	View transcript data.
Application Course Detail	APPL_CRSE_SEC	Click the App Course Detail link to open the Application Course Detail page.	View an applicant's course detail information.

Viewing Materials Summary Information

Access the Materials Summary page.



Materials Summary page

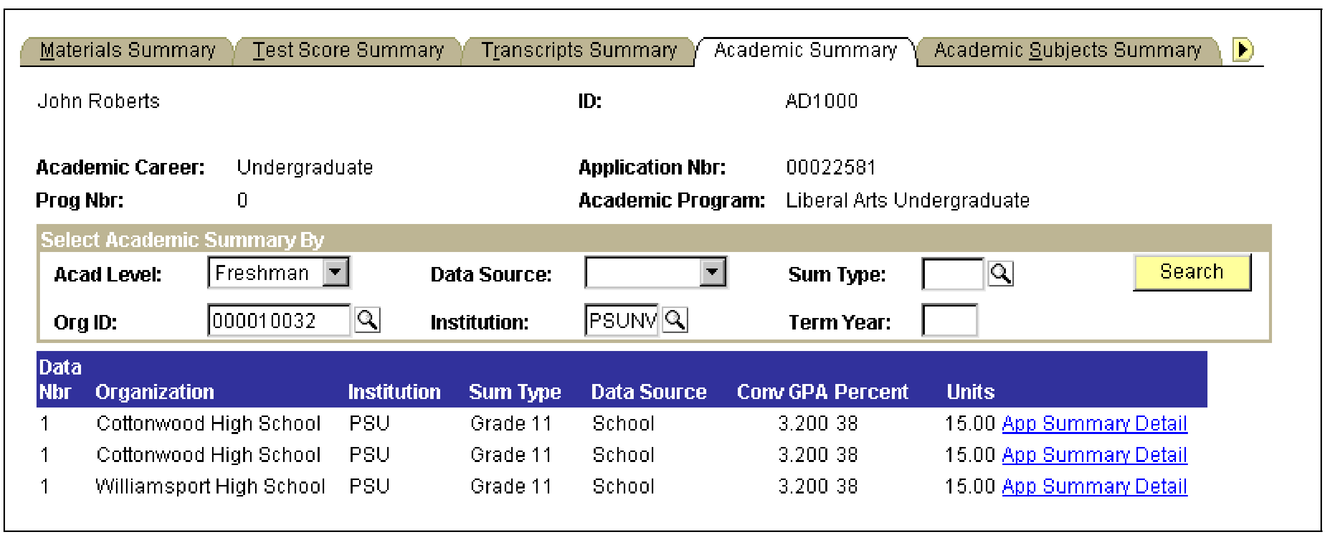
You must first attach materials to the application on the Application Materials page.

Interviewer Detail Click to view about interviewer information about this material type. The Interviewer Detail page appears.

Recommender Detail Click to view recommender information about this material type. The Recommender Detail page appears.

Viewing Academic Summary Information

Access the Academic Summary page.



Academic Summary page

Acad Level (academic level) Select the academic level for which you want to search for academic summary information.

Org ID (organization ID) Select the organization ID for which you want to search for academic summary information.

Data Source Select the data source for which you want to search for academic summary information.

Institution Select the academic institution for which you want to search for academic summary information.

Sum Type (summary type) Select the summary type for which you want to search for academic summary information.

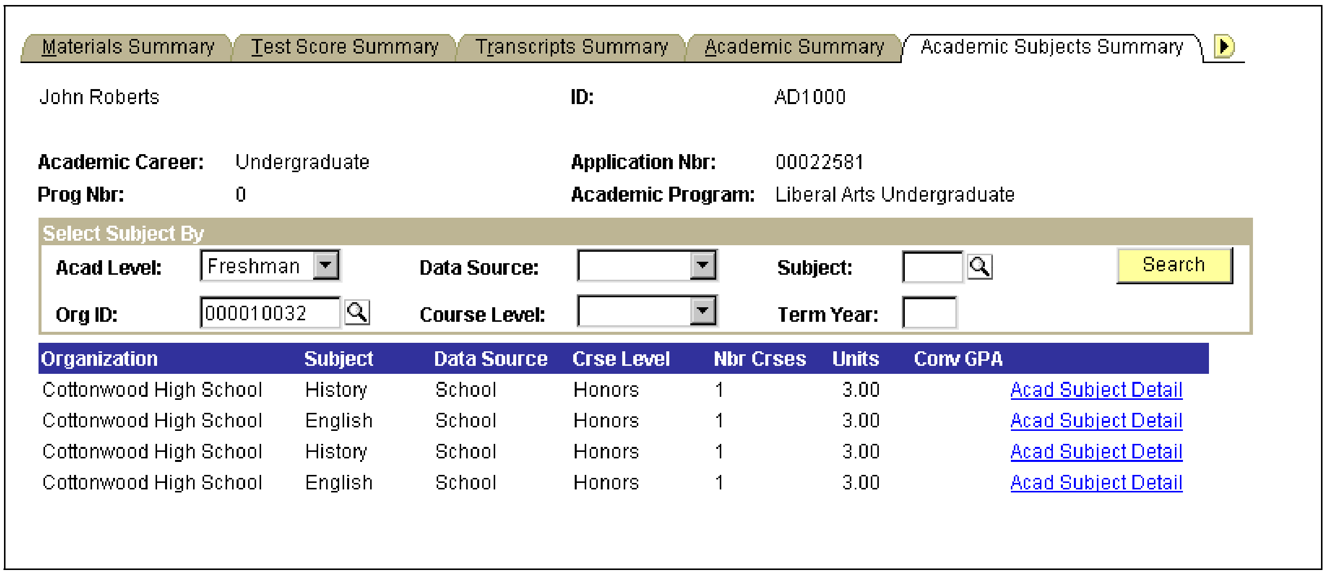
Term Year Select the term year for which you want to search for academic summary information.

Search Click to bring up information matching your search criteria.

App Summary Detail (application summary detail) Click to view application summary details. The Application Summary Detail page appears.

Viewing Academic Subjects Summary Information

Access the Academic Subjects Summary page.



Academic Subjects Summary page

Acad Level (academic level) Select the academic level for which you want to search for academic subjects summary information.

Org ID (organization ID) Select the organization ID for which you want to search for academic summary information.

Data Source Select the data source for which you want to search for academic subjects summary information.

Course Level Select the course level for which you want to search for academic subjects summary information.

Subject Select the subject for which you want to search for academic subjects summary information.

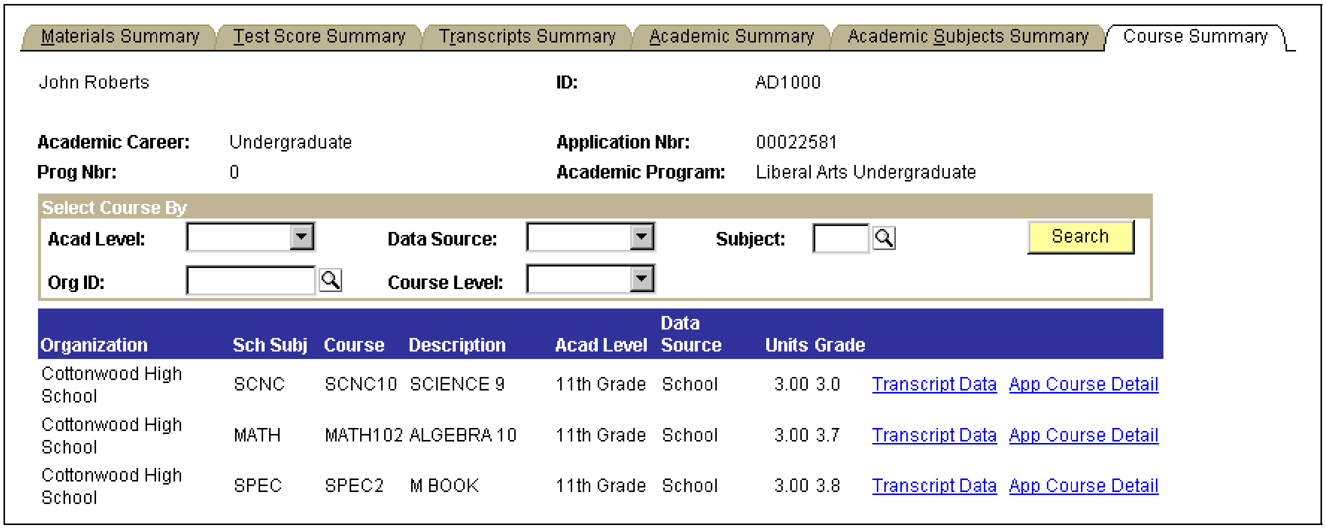
Term Year Select the term year for which you want to search for academic subjects summary information.

Search Click to bring up information matching your search criteria.

Acad Subject Detail (academic subject detail) Click to view academic subject details. The Application Subject Detail page appears.

Viewing Course Summary Information

Access the Course Summary page.



Course Summary page

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

Acad Level (academic level) Select the academic level for which you want to search for course summary information.

Org ID (organization ID) Select the organization ID for which you want to search for course summary information.

Data Source Select the data source for which you want to search for course summary information.

Course Level Select the course level for which you want to search for course summary information.

Subject Select the subject for which you want to search for course summary information.

Search Click to bring up information matching your search criteria.

Transcript Data Click to view transcript data. The Transcript Data page appears.

App Course Detail (application course detail) Click to view application course details. The Application Course Detail page appears.

CHAPTER 13

Viewing Groups of Prospects or Applicants

This chapter discusses how to:

- View prospects and applicants by organization.
- View prospects and applicants assigned to a specific recruiter.

Viewing Prospects and Applicants by Organization

This section discusses how to:

- View prospects by organization.
- View contact information.
- View applicants by organization.

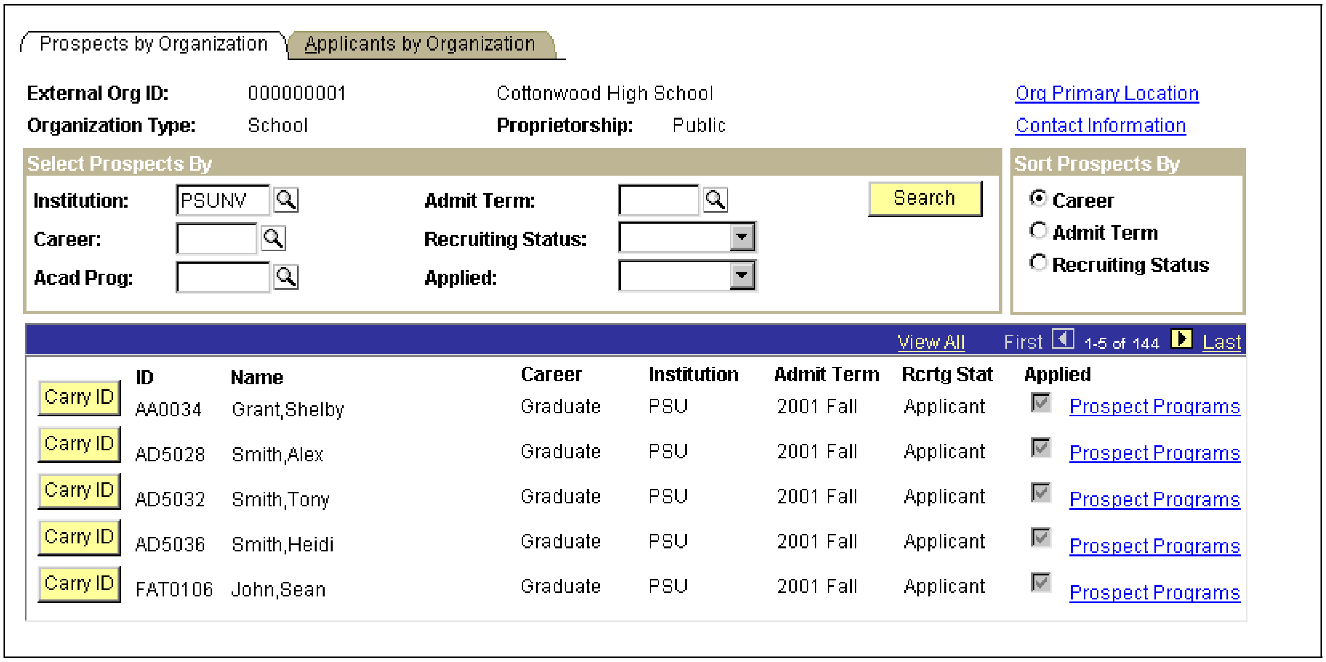
Pages Used to View Applicants and Prospects by Organization

Page Name	Object Name	Navigation	Usage
Prospects by Organization	ORG_PRSP_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Org Admissions Summary, Prospects by Organization • Develop Enrollment, Manage Recruiters, Inquire, Org Admissions Summary, Prospects by Organization • Develop Enrollment, Process Applications, Inquire, Org Admissions Summary, Prospects by Organization • Develop Enrollment, Recruit Prospective Students, Inquire, Org Admissions Summary, Prospects by Organization	Look up lists of prospects associated with a particular organization, or school, and display the records in the order you choose. You can even narrow the scope to view only certain prospects associated with the school.

Page Name	Object Name	Navigation	Usage
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Programs link on the Prospects by Organization page.	View a listing of programs for a prospect.
Organization Primary Location	EXT_ORG_PRIM_LOC	Click the Org Primary Location link on the Prospects by Organization page.	View the primary address of the Organization or school.
Organization School Information	SCHOOL_INFO	Click the Detail button on the Organization Primary Location page.	View additional information regarding a school.
Contact Information	EXT_ORG_CNTCT_SEC	Click the Contact Information link on the Prospects By Organization page.	View any contacts associated with this school.
Contact Phone Information	EXT_ORG_CNTCT_PHN	Click the Ext Org Phone/Email button on the Contact Information page.	View phone numbers and email addresses of organization contacts.
Contact Location Information	EXT_ORG_CNTCT_LOC	Click the Address button on the Contact Information page.	View a contact's address.
Applicants by Organization	ORG_APPL_SUMMARY	• Develop Enrollment, Evaluate Applicants, Inquire, Org Admissions Summary, Applicants by Organization • Develop Enrollment, Manage Recruiters, Inquire, Org Admissions Summary, Applicants by Organization • Develop Enrollment, Process Applications, Inquire, Org Admissions Summary, Applicants by Organization • Develop Enrollment, Recruit Prospective Students, Inquire, Org Admissions Summary, Applicants by Organization	Look up lists of applicants associated with a particular organization, or school, and display the records in the order you choose. You can even narrow the scope to view only certain applicants associated with the school.
Program Summary	ORG_APPL_P_SEC	Click the Applicant Programs link to view the Program Summary page.	View a listing of academic programs for an applicant.

Viewing Prospects by Organization

Access the Prospects by Organization page.



Prospects by Organization page

Institution	Select the academic institution for which you want to search for prospect information.
Career	Select the academic career for which you want to search for prospect information.
Acad Prog (academic program)	Select the academic program for which you want to search for prospect information.
Admit Term	Select the admit term for which you want to search for prospect information.
Recruiting Status	Select the recruiting status for which you want to search for prospect information.
Applied	Select whether you want to see prospects who applied to your institution or not.
Sort Prospects By	In this group box, select whether you want to view prospects by career, admit term, or recruiting status.
Search	Click this button to bring up the prospects matching your search criteria. If any matches are found, they display in the bottom portion of the page.
Carry ID	Click this button to carry this person's ID to the next page you open.
Prospect Programs	Click this link to view a listing of the academic programs for a prospect. The Prospect Programs page appears.
Org Primary Location (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.
Contact Information	Click this link to view any contacts associated with this school. The Contact Information page appears.

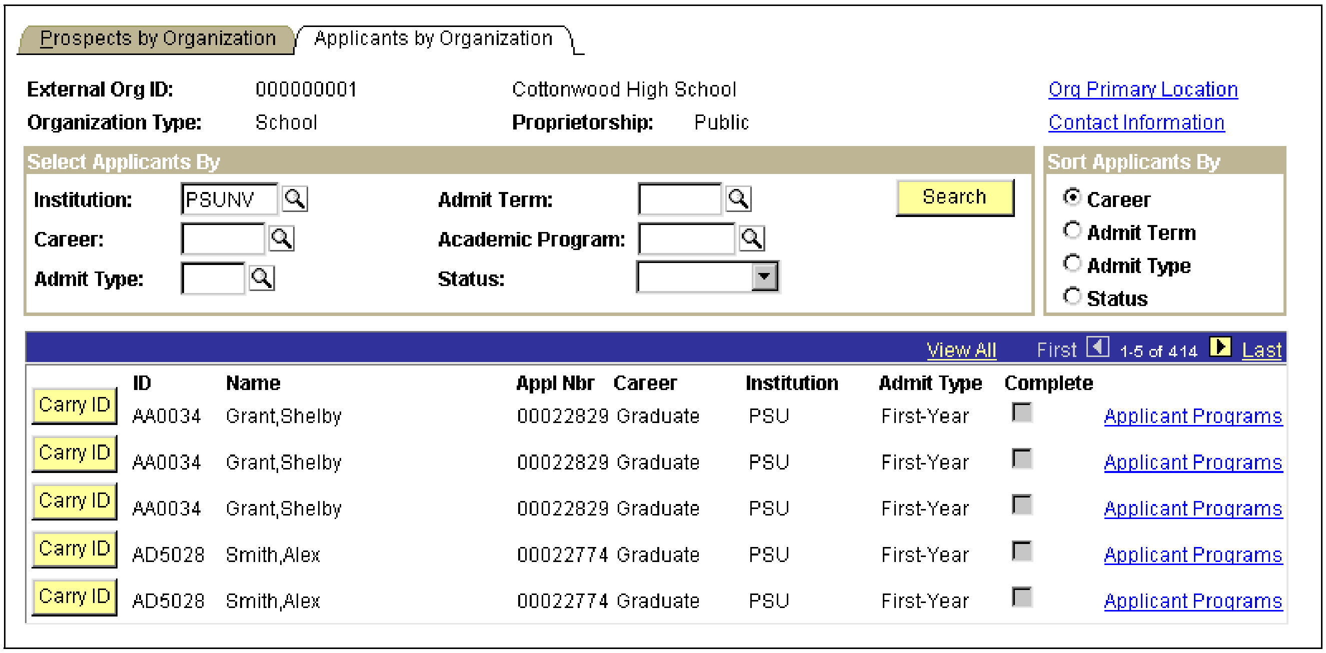
Viewing Contact Information

Access the Contact Information page.

	Click this button to view phone number and email address information. The Contact Phone Information Page appears.
	Click this button on the Contact Information page to view a contact's address. The Contact Location Information page opens.

Viewing Applicants by Organization

Access the Applicants by Organization page.



Applicants by Organization page

Institution and Career	These values default according to your user defaults. Edit if necessary.
Admit Type	Select an admit type.
Admit Term	Select the admit term of the applicants you want to view.
Acad Program (academic program)	Select an academic program.
Status	Select a status if you want to only see applicants with a particular program status. For example, you might only want to see applicants with a *Cancelled* or *Waitlisted* status.
Acad Career (academic career), **Admit Term, Admit Type,** or **Status**	Select whether you want to view prospects by academic career, admit term, admit type, or status.
Search	Click to bring up the applicants matching your search criteria. If any matches are found, they display in the bottom portion of the page.

Carry ID	Click to carry this person's ID to the next page you open.
Applicant Programs	Click to view a listing of programs for an applicant. The Program Summary page opens.
Org Primary Location (organization primary location)	Click to view the primary address of the organization or school. The Organization Primary Location page appears.
Contact Information	Click to view any contacts associated with this school. The Contact Information page appears.

Viewing Prospects and Applicants Assigned to a Specific Recruiter

This section discusses how to:

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

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

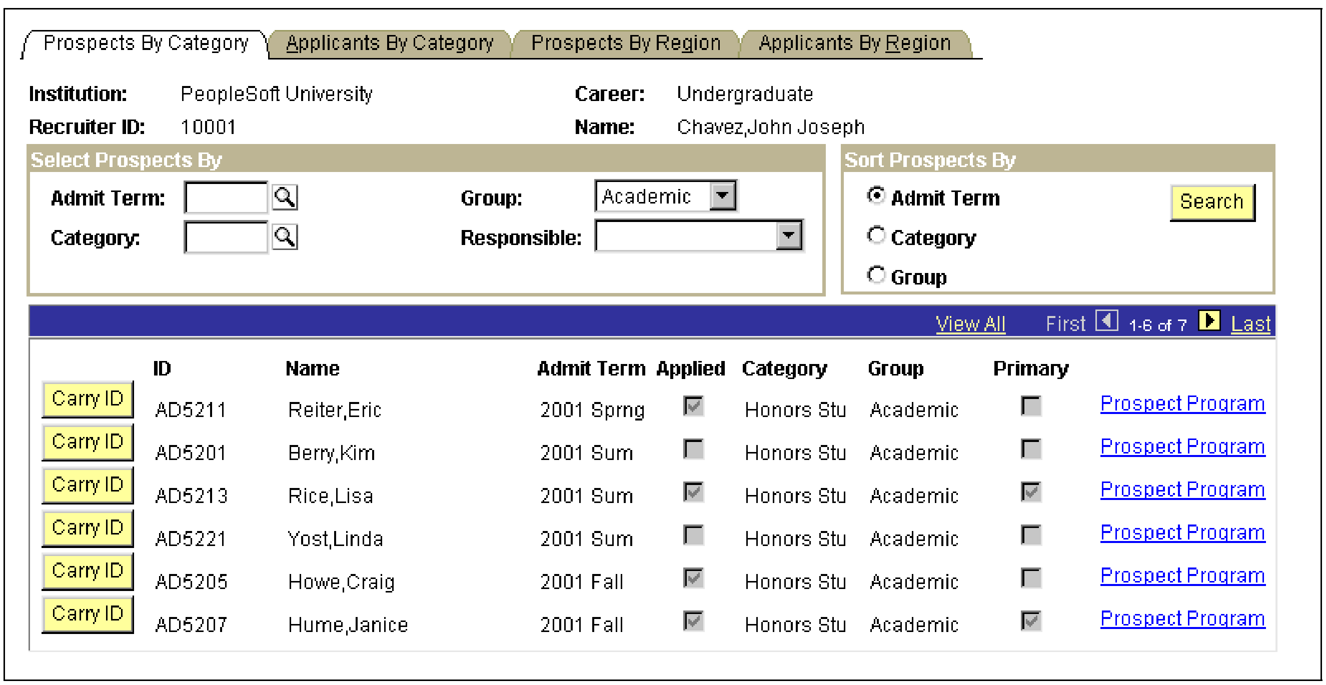
Page Name	Object Name	Navigation	Usage
Prospects by Category	RCR_PRSP_CAT_SUMM	• Develop Enrollment, Evaluate Applicants, Inquire, Recruiter Summary, Prospects By Category • Develop Enrollment, Manage Recruiters, Inquire, Recruiter Summary, Prospects By Category • Develop Enrollment, Process Applications, Inquire, Recruiter Summary, Prospects By Category • Develop Enrollment, Recruit Prospective Students, Inquire, Recruiter Summary, Prospects By Category	Look up lists of prospects associated with a particular recruiter for any category to which the recruiter is assigned. Additionally, you can display the records in the sort order you choose.

Page Name	Object Name	Navigation	Usage
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Program link on the Prospects by Category page.	View a listing of programs for a prospect.
Applicants by Category	RCR_APPL_CAT_SUMM	• Develop Enrollment, Evaluate Applicants, Inquire, Recruiter Summary, Applicants By Category • Develop Enrollment, Manage Recruiters, Inquire, Recruiter Summary, Applicants By Category • Develop Enrollment, Process Applications, Inquire, Recruiter Summary, Applicants By Category • Develop Enrollment, Recruit Prospective Students, Inquire, Recruiter Summary, Applicants By Category	Look up lists of applicants associated with a particular recruiter for any category to which the recruiter is assigned. Additionally, you can display the records in the sort order you choose.
Program Summary	ADM_APPL_P_SEC	Click the Program Detail link on the Applicants by Category page.	View a listing of programs for an applicant.
Prospects by Region	RCR_PRSP_REG_SUMM	• Develop Enrollment, Evaluate Applicants, Inquire, Recruiter Summary, Prospects By Region • Develop Enrollment, Manage Recruiters, Inquire, Recruiter Summary, Prospects By Region • Develop Enrollment, Process Applications, Inquire, Recruiter Summary, Prospects By Region • Develop Enrollment, Recruit Prospective Students, Inquire, Recruiter Summary, Prospects By Region	Look up lists of prospects associated with a particular region and assigned to a particular recruiter. You can, for example, search by last school attended, or by region. Additionally, you can display the records in the sort order you choose.
Prospect Programs	ADM_PRSPCT_R_SEC	Click the Prospect Programs link on the Prospects by Region page.	View any program information recorded for a prospect.

Page Name	Object Name	Navigation	Usage
Applicants by Region	RCR_APPL_REG_SUMM	• Develop Enrollment, Evaluate Applicants, Inquire, Recruiter Summary, Applicants By Region • Develop Enrollment, Manage Recruiters, Inquire, Recruiter Summary, Applicants By Region • Develop Enrollment, Process Applications, Inquire, Recruiter Summary, Applicants By Region • Develop Enrollment, Recruit Prospective Students, Inquire, Recruiter Summary, Applicants By Region	Look up lists of applicants associated with a particular region and assigned to a particular recruiter. You can, for example, search by last school attended, or by region. Additionally, you can display the records in the sort order you choose.

Viewing Prospects Assigned to a Specific Recruiter, by Category

Access the Prospects by Category page.



Prospects by Category page

Select Prospects By — In this group box fill in the appropriate values designating which prospects you want to see. You must fill in at least one field as search criteria.

Admit Term — Select an admit term if you want to specify a particular term.

Category — Select a recruiting category to narrow which prospects you want to see. Leave this field blank if you want all prospects assigned to this recruiter, regardless of category.

Note. *REGN* is the one category that cannot be searched on this page, it has its own page: Prospects by Region.

Group — Select a recruitment group if you want to search for a broader recruiting group.

Respnsible (responsible) — Select a value in this field if you want to see only prospects for whom this recruiter is the primary recruiter, or only prospects for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all prospects regardless of the recruiter's responsibility role.

Admit Term, Category, or **Group** — Select whether you want to view prospects by admit term, category or group.

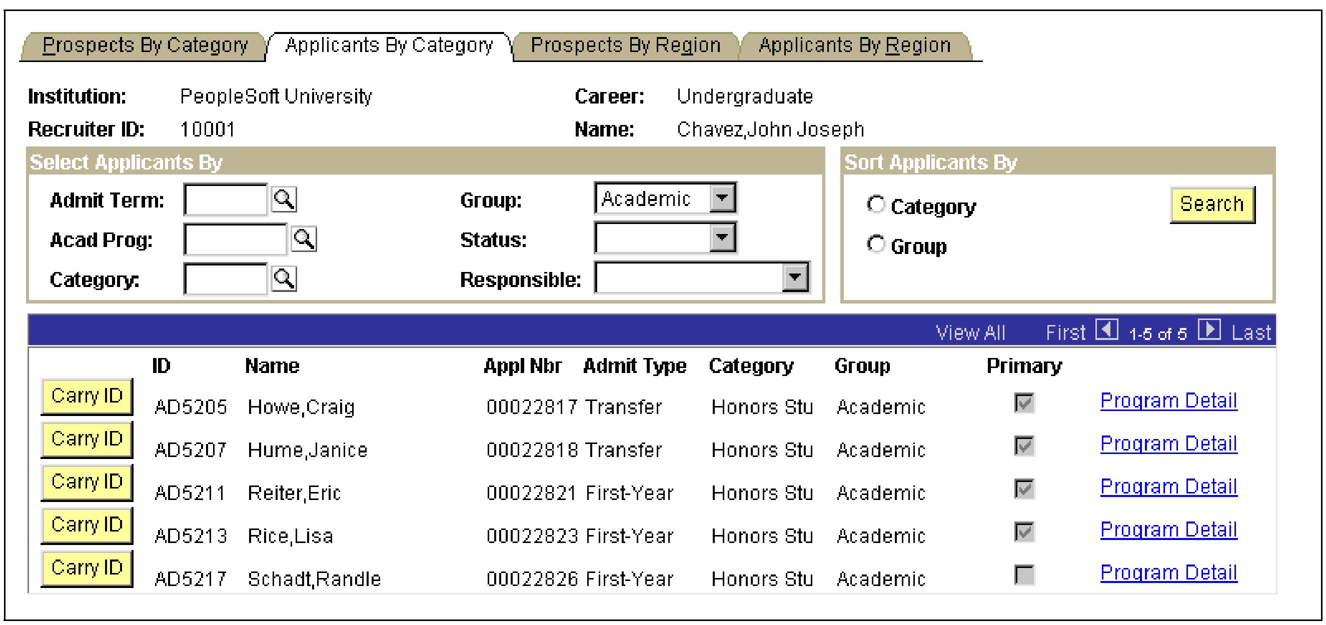
Search — Click this button to bring up the prospects matching your search criteria. If any matches are found, they display in the bottom portion of the page.

Carry ID — Click this button to carry this person's ID to the next page you open.

Prospect Program — Click this link to view a listing of programs for a prospect. The Prospect Programs page appears.

Viewing Applicants Assigned to a Specific Recruiter, by Category

Access the Applicants by Category page.


Prospects By Category | Applicants By Category | Prospects By Region | Applicants By Region

Institution: PeopleSoft University Career: Undergraduate
Recruiter ID: 10001 Name: Chavez,John Joseph

Select Applicants By
Admit Term: Group: Academic
Acad Prog: Status:
Category: Responsible:

Sort Applicants By
Category
Group
Search

View All First 1-5 of 5 Last

	ID	Name	Appl Nbr	Admit Type	Category	Group	Primary	
Carry ID	AD5205	Howe,Craig	00022817	Transfer	Honors Stu	Academic	☑	Program Detail
Carry ID	AD5207	Hume,Janice	00022818	Transfer	Honors Stu	Academic	☑	Program Detail
Carry ID	AD5211	Reiter,Eric	00022821	First-Year	Honors Stu	Academic	☑	Program Detail
Carry ID	AD5213	Rice,Lisa	00022823	First-Year	Honors Stu	Academic	☑	Program Detail
Carry ID	AD5217	Schadt,Randle	00022826	First-Year	Honors Stu	Academic	☐	Program Detail

Applicants by Category page

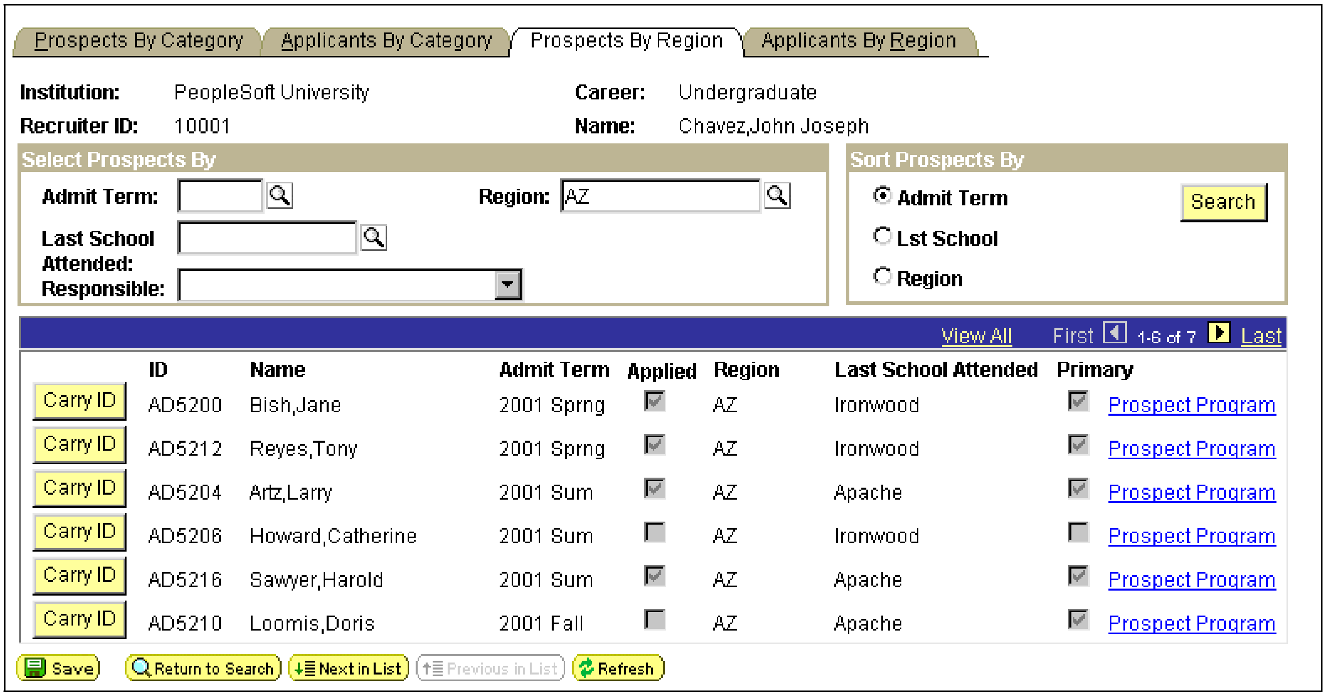
Select Applicants By — In this group box fill in the appropriate values designating which applicants you want to see. You must fill in at least one field as search criteria.

Admit Term — Select an admit term if you want to specify a particular term.

Acad Program (academic program)	Select an academic program if you want to specify a particular program.
Category	Select a recruiting category to narrow which applicants you want to see. Leave this field blank if you want all applicants assigned to this recruiter, regardless of category. **Note.** *REGN* is the one category that cannot be searched on this page, it has its own page: Applicants by Region.
Group	Select a recruitment group if you want to search for a broader recruiting group.
Status	If you want to select only applicants with a certain program status, select the proper value in the status field.
Respnsible (responsible)	Select a value in this field if you want to see only applicants for whom this recruiter is the primary recruiter, or only applicants for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all applicants regardless of the recruiter's responsibility role.
Admit Term, Category, Group, or **Status**	Select whether you want to view applicants by admit term, category, group, or status.
Search	Click this button to bring up the applicants matching your search criteria. If any matches are found, they are displayed in the bottom portion of the page.
Carry ID	Click this button to carry this person's ID to the next page you open.
Program Detail	Click this link to view a listing of programs for an applicant. The Program Summary page appears.

Viewing Prospects Assigned to a Specific Recruiter, by Region

Access the Prospects by Region page.



Prospects by Region page

Select Prospects By — In this group box you fill in the appropriate values designating which prospects you want to see. You must fill in at least one field as search criteria.

Admit Term — Select an admit term if you want to specify a particular term.

Region — Select a region to narrow which prospects you want to see. Leave this field blank if you want all prospects assigned to this recruiter, regardless of region.

Lst School Attended (last school attended) — Select a last school attended if you want to search for prospects who last attended a particular school.

Responsible — Select a value in this field if you want to see only prospects for whom this recruiter is the primary recruiter, or only prospects for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all prospects regardless of the recruiter's responsibility role.

Admit Term, Lst School (last school attended), or **Region** — Select whether you want to view prospects by admit term, last school attended, or region.

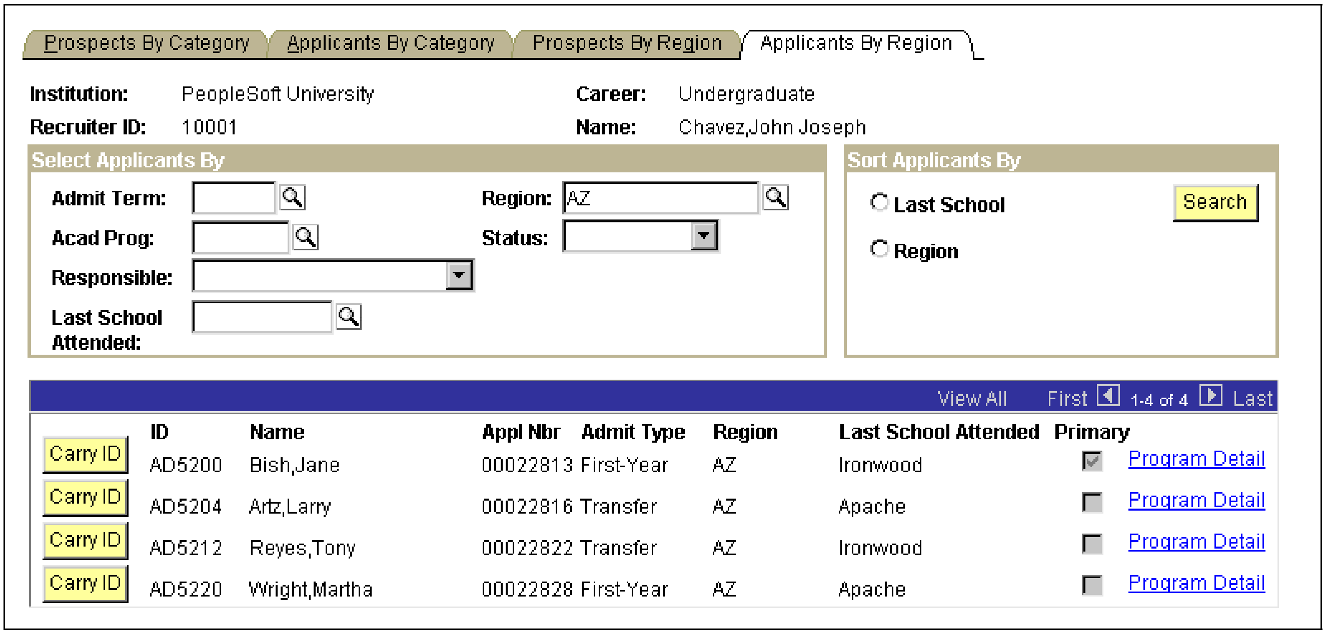
Search — Click this button to bring up the prospects matching your search criteria. If any matches are found, they are displayed in the bottom portion of the page.

Carry ID — Click this button to carry this person's ID to the next page you open.

Prospect Program — Click this link to open the Prospect Programs page to view details about the program or programs related to a prospect's academic career. The Prospect Programs page appears.

Viewing Applicants Assigned to a Specific Recruiter, by Region

Access the Applicants by Region page.



Applicants by Region page

Select Applicants By — In this group box you fill in the appropriate values designating which applicants you want to see. You must fill in at least one field as search criteria.

Admit Term — Select an admit term if you want to specify a particular term.

Region — Select a region to narrow which applicants you want to see. Leave this field blank if you want all applicants assigned to this recruiter, regardless of region.

Acad Program (academic program) — Select an academic program if you want to specify a particular academic program.

Status — Select an application status if you only want to see applicants of a particular status.

Respnsible (responsible) — Select a value in this field if you want to see only applicants for whom this recruiter is the primary recruiter, or only applicants for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all applicants regardless of the recruiter's responsibility role.

Lst School Attended (last school attended) — Select a last school attended if you want to search for applicants who last attended a particular school.

Admit Term, Lst School (last school attended), or **Region** — Select whether you want to view applicants by admit term, last school attended, or region.

Search — Click to bring up the applicants matching your search criteria. If any matches are found, they are displayed in the bottom portion of the page.

Carry ID — Click this button to carry this person's ID to the next page you open.

Program Detail	Click to view a listing of the programs for an applicant. The Program Summary page appears.

CHAPTER 14

Adding and Updating Applications

This chapter discusses how to:

- Add new applications manually.
- Add new prospects and applications with quick admit.
- Load applications from external test score data.
- Update applications.
- View application summary information.
- Calculate application fees in batch.
- Record an applicant's basis of admission.
- Record comments and conditions of admission.
- Viewing summary checklist, comment, and communication data.

See Also

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 101

Adding New Applications Manually

If the applicants you are entering do not already exist in your database, the system creates them and assigns them identification numbers.

The first two pages in this component store information regarding the applicant as a *person*. This data is shared between all applications for an applicant, as well as with prospect personal data. Updating personal data here updates it throughout the database. The last four pages in this component, however, are application-specific pages, meaning they store information unique to this *application*. In other words, applications share personal data but application data is unique to each application.

Avoid entering duplicate applications. Specify on the Installation Defaults - AD page at what level you want the system to warn you that a potential duplicate application exists.

See Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 19.

The Process Applications, Application Data component is the second of three very similar components:

- Recruit Prospective Students, Prospect Data component.
- Process Applications, Application Entry component.

- Process Applications, Application Maintenance component.

All three components have a Bio/Demo page, an Addresses page, and other pages with similar names such as Prospect Program Data page and Application Program Data page. You use these components to enter or maintain similar information at different times during your business processes: for entering prospects, for entering application data, and for maintaining application data.

This section lists prerequisites and discusses how to:

- Enter or update applicant bio/demographic data.
- Enter or update applicant addresses.
- Enter application program data.
- Enter application data.
- Enter recruiting information for an application.
- Add communications, checklists and comments for applicants.

Prerequisites

Before you begin entering application data, determine if the person is already in your Student Administration database. Often an applicant already has a system ID because an administrator already entered the person as a prospective student. For example, if a person sent test scores to your institution, it is likely that he or she is already in the system.

To see if the applicant is already in your system, select Develop Enrollment, Process Applications, Inquire, Search Match.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Searching for Records," Using Search/Match

Pages Used to Add New Applications Manually

Page Name	Object Name	Navigation	Usage
Application Program Data	ADM_APPL_PROG_ENT	Develop Enrollment, Process Applications, Use, Application Entry, Application Program Data	Enter program data and academic plan data pertaining to this application. You can also create an enrollment deposit and matriculate an applicant from this page. You must track applications at least at the plan level, but any lower level tracking depends on your office policies.
Evaluation	ADM_APPL_EVAL1_SEC	Click the Evaluation button on the Application Program Data page.	Add an evaluation status for this program.

Page Name	Object Name	Navigation	Usage
Deposit Fees	ADM_APPL_DEP_FEE	Click the Calculate Deposit Fees link on the Application Program Data page.	Calculate a deposit fee when entering a new application. You can calculate the deposit owed for enrollment and post that charge to the person's account directly from the Application Program Data page as part of adding a new application. If the application has a program status of admitted, the Calculate Deposits Fees link becomes available.
Deposit Fees (entry)	ADM_APPL_ENTRY2_S	Click the Calculate Deposit Fees button or the Deposit Fees link on the Deposit Fees page.	Enter deposit fees for the applicant. **Note.** When this deposit posts in PeopleSoft Student Financials, the system updates the program action to matriculation if you selected the Create Student check box on the Status Update page.
Application Data	ADM_APPL_DATA	• Develop Enrollment, Evaluate Applicants, Use, Application Maintenance, Application Data • Develop Enrollment, Process Applications, Use, Application Entry, Application Data • Develop Enrollment, Process Applications, Use, Application Maintenance, Application Data	Enter additional information regarding the application and to calculate an application fee. The system stores data on this page at the *application* level, as opposed to storing it under a person or academic program. This data is relevant to all academic programs being applied to with this application.
Application Fees	APP_FEE_CALC_MSG	Click the Calculate Application Fees link on the Application Data page.	Calculate the application fee that the person owes.
Tender Details	ADM_APPL_TNDRCC_SP	The Tender Details page displays when you select the Credit Card tender category on the Application Fees page.	Enter credit card information. See *PeopleSoft 8 SP1 Student Financials PeopleBook*, "Cashiering," Accepting Student Payments.

Page Name	Object Name	Navigation	Usage
Tender Details	ADM_APPL_TENDER_SP	The Tender Details page displays when you select the Check tender category on the Application Fees page.	Enter check information when you select the Check currency type. See *PeopleSoft 8 SP1 Student Financials PeopleBook*, "Cashiering," Accepting Student Payments.
Currency Conversion	APPL_FEE_CURR_SP	Click the Currency Conversion Details link on the Application Fees page.	Obtain details on the currency conversion. See *PeopleSoft 8 SP1 Student Financials PeopleBook*, "Cashiering," Accepting Student Payments.
Application Items	ADM_APPL_ENTRY3_S	Click the Transaction Summary link on the Application Data page to view information about the Application Fee for this application. The Application Items page opens.	Review information about the Application Fee for an applicant.
Tender Details	PAYMENT_TENDER_SP	Click the Show Tender Details page from the Application Items page.	View tender details.
Application School/Recruiting	ADM_APPL_RECRUIT	• Develop Enrollment, Evaluate Applicants, Use, Application Maintenance, Application School/Recruiting • Develop Enrollment, Process Applications, Use, Application Entry, Application School/Recruiting • Develop Enrollment, Process Applications, Use, Application Maintenance, Application School/Recruiting	Enter recruiting information about an applicant.
Application Recruiters	ADM_APPL_RCR_SUMM	• Develop Enrollment, Evaluate Applicants, Inquire, Application Recruiters, Application Recruiters • Develop Enrollment, Process Applications, Inquire, Application Recruiters, Application Recruiters	Look up a list of recruiters assigned to an applicant for a particular application.

Entering or Updating Applicant Bio/Demographic Data

Use the Bio/Demo Data (biographic/demographic data) page to enter and update the known biographic/demographic data for this applicant.

If, by performing search/match, you discovered that the person does *not* yet have an ID in your database, the key dialog prompt says *NEW* in the ID field because you are adding a new person as well as a new application. The application number will be all zeros.

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

If you found the person in your search/match and used the Carry ID option, your key dialog prompt lists that person's ID. The application number is still all zeros.

If the person exists in your database, it is a good idea to see if this application has already been entered. You do *not* want to enter a duplicate application. Go to the Application Maintenance component to determine if the person has any current applications.

If you found a matching ID during your search process, the Bio/Demo Data page displays existing data about this person. If you did not find a matching ID during your search process, then you add a new person as well as a new application. The page is blank except for those fields populated according to your user defaults.

After running a search/match, select Develop Enrollment, Process Applications, Use, Application Entry to add a new application.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Entering or Updating Applicant Addresses

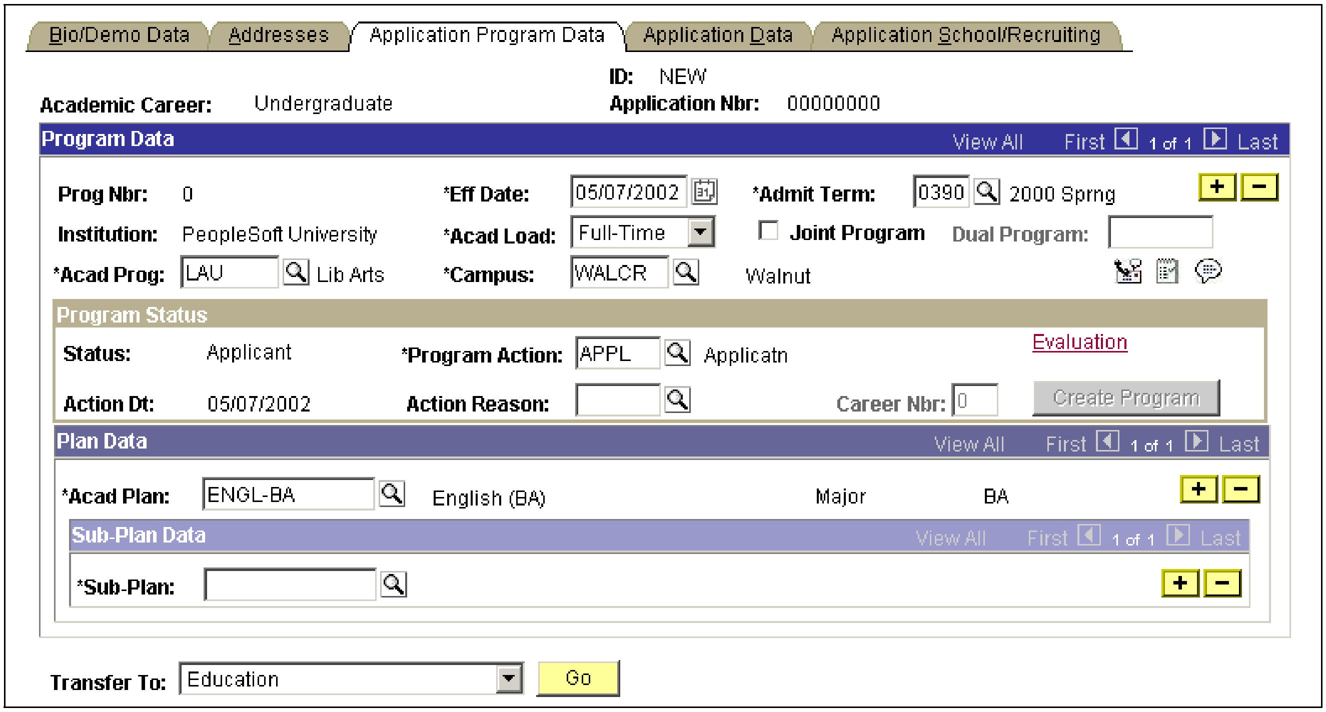
Use the Applicant Addresses page to enter new or update existing address information. If this person is already in your database and has existing address information, you can view it on this page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Entering Application Program Data

Access the Application Program Data page.



Application Program Data page

Note. The system fills in most of the fields on the Application Program Data page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, some fields fill in according to those defaults. For example, depending on your default setup, the system might populate academic career, institution, admit term, academic load, and academic program data based on the values in the matching prospect record.

Eff Date (effective date)
Enter an effective date for the application to this academic program if different than the default date. Note that you can use this field to back-admit an applicant.

Admit Term
Select the admit term that the applicant is expected to enroll in if admitted for this application. Define admit terms on the Term Table page.

Acad Load (academic load)
Select the academic load that the applicant will be taking on if admitted for this application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Full-Time* and *Part-Time.*

Joint Program
Select the Joint Program check box if the applicant is applying to a joint program.

Dual Program
This field becomes available when you select the Joint Program check box. Select the joint academic program. Define dual programs on the Academic Program page.

Acad Program (academic program)
Enter or update the academic program to which the person is applying. Define academic programs on the Academic Program page.

Once you matriculate the applicant, the system copies the application program data to the program/plan tables in PeopleSoft Student Records.

Campus Select or update the campus to which the person is applying within your academic institution. Define campuses on the Campus Table page.

Status Because you are entering a new application, this field automatically displays *Applicant.*

Program Action Because you are entering a new application, this field automatically displays *APPL* (application). Define program actions on the Admissions Action Table page. If you are admitting the person at this time, select a program action of admit.

Action Dt (action date) The default for the action date is your system date. This is the date that the action was actually entered into the system (contrast this with the effective date).

Action Reason If there are action reasons associated with the program action that you selected, you can select the appropriate reason value. Action reasons enable you to record a brief explanation of why the program action took place. For example, for the action *Administrative Withdrawal,* you could define a reason of *Incomplete Application.* Define action reasons on the Program Action Reason Table page.

Career Nbr (career number) Available if the Program Action field contains the value *RAPP* (readmit application). If you want to readmit this applicant for this application into an existing career, you can select the proper career number here. You must also have an admit type where the Readmit Processing Required check box has been selected on the Admit Type Table page. The system readmits the person into the career that corresponds to the career number that you select.

Acad Plan (academic plan) Select the academic plan within the academic program being applied to with this application. An academic plan can be any area of study, such as English, math minor, physics, or undeclared. Define academic plans on the Academic Plan Table page.

Sub-Plan If a sub-plan exists within the academic plan, select the sub-plan here. Define academic sub-plans on the Academic Sub-Plan Table page.

Calculate Deposit Fees Click this link to calculate an enrollment deposit. The Calculate Deposit Fees Page appears.

If your application center has designated a deposit fee code that requires a deposit, and you enter a program status of *Admit,* the Calculate Deposit Fees link appears. You can not exit the component until you calculate the enrollment deposit. Application centers are designated on the Application Data page.

Create Program To matriculate the applicant at the same time you are entering the new application, select *MATR* (matriculation), in the Program Actionfield. The Create Program button becomes available.

Click the Create Program button to save the component. Also, note that if you selected *MATR* in the Program Action field, you are *required* to click the Create Program button (which, again, saves the component) before exiting the component.

Once you matriculate a person, the system creates a record in PeopleSoft Student Records. All fields on this page are unavailable because to access the information you need access to pages in PeopleSoft Student Records. Therefore, if you must make a change to this person's record after matriculation, you must do so through the PeopleSoft Student Records menu.

The PeopleSoft Recruiting and Admissions application enables you to record multiple academic programs for one application under an academic career. Once you have saved the Application Entry component, however, you must use the Program Addition page to add an additional program. Note that the Prog Number field shows the number of the program in the order it was entered. If you only have one program, it displays "*0*". The next program displays "*1*", and so on.

Before matriculating the applicant, you might want to move to the next page in the Application Entry component first to record additional information about the applicant before you perform the matriculation process.

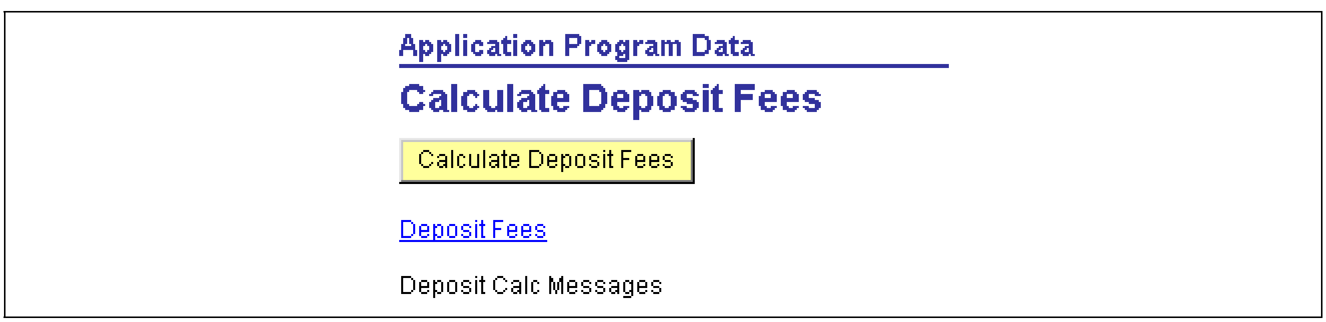
Go

Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Note. To make changes to this page once it has been saved, you must do so through the Application Maintenance component. If you are only entering one program for the applicant, enter only one program action on the Application Data Entry page. You must enter additional program actions through the Application Maintenance component. For example, suppose you enter the application initially with a program action of APPL in the Application Entry component. When you admit the applicant, you would enter the program action of ADMT in the Application Maintenance component.

Using the Calculate Deposit Fees Page

Access the Calculate Deposit Fees page.



Calculate Deposit Fees page

Calculate Deposit Fees

Click this button to calculate an enrollment deposit fee. The Deposit Fees Page appears.

Deposit Fees

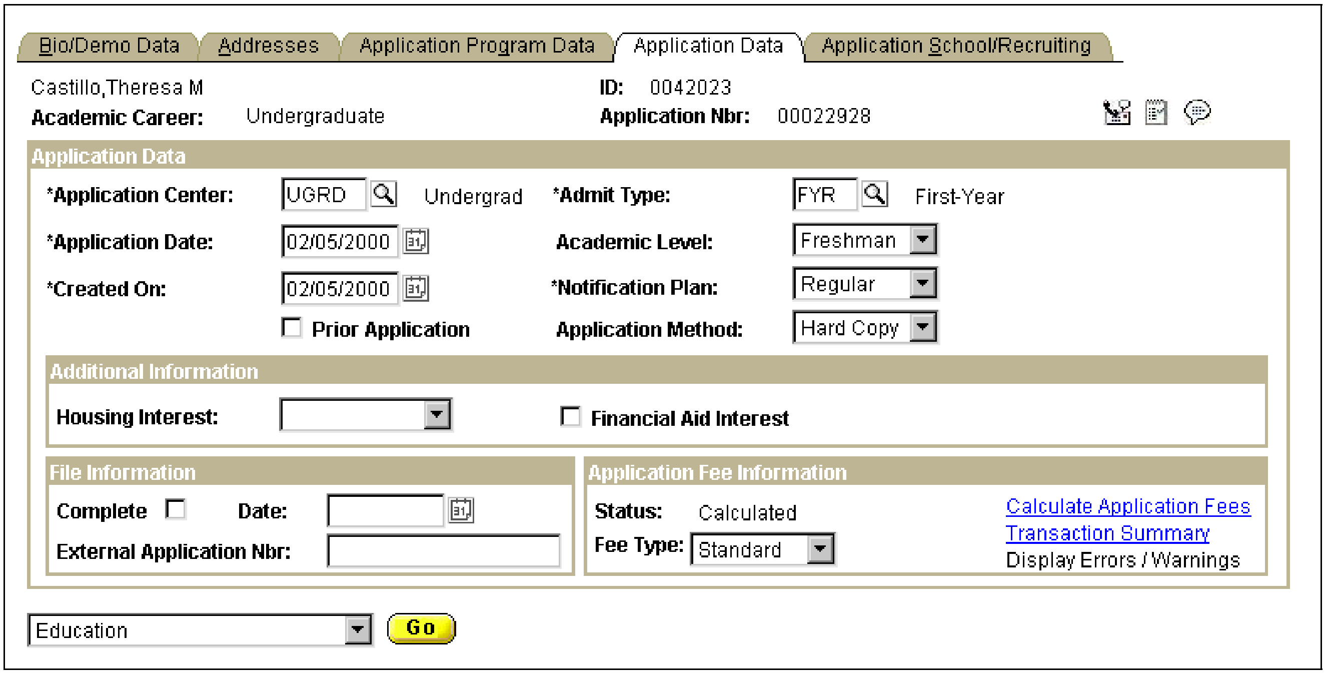
Click this link to view details about this person's enrollment deposit. The Deposit Fees Page appears.

Deposit Calc Msg (deposit calculation message)

Click this link to view messages that occur while trying to calculate deposit fees. This link becomes available when the system generates a message.

Entering Application Data

Access the Application Data page.



Application Data page

Note. The system fills in most of the fields on this page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, some fields will be filled in according to those defaults.

Application Center Select the application center that will process this application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page.

Admit Type Select the admit type for this applicant regarding this application (such as *First-Year* or *Transfer,* for example). Define admit types on the Admit Type Table page.

Application Date The default for the application date is your system date.

Academic Level Select the academic level to which the applicant is applying for admission with this application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Freshman, Graduate, Junior, Not Set,* and *Post-Baccalaureate.* This is a user default field.

Created On The default for the created date is your system date. This should be the date on which you are creating this application record.

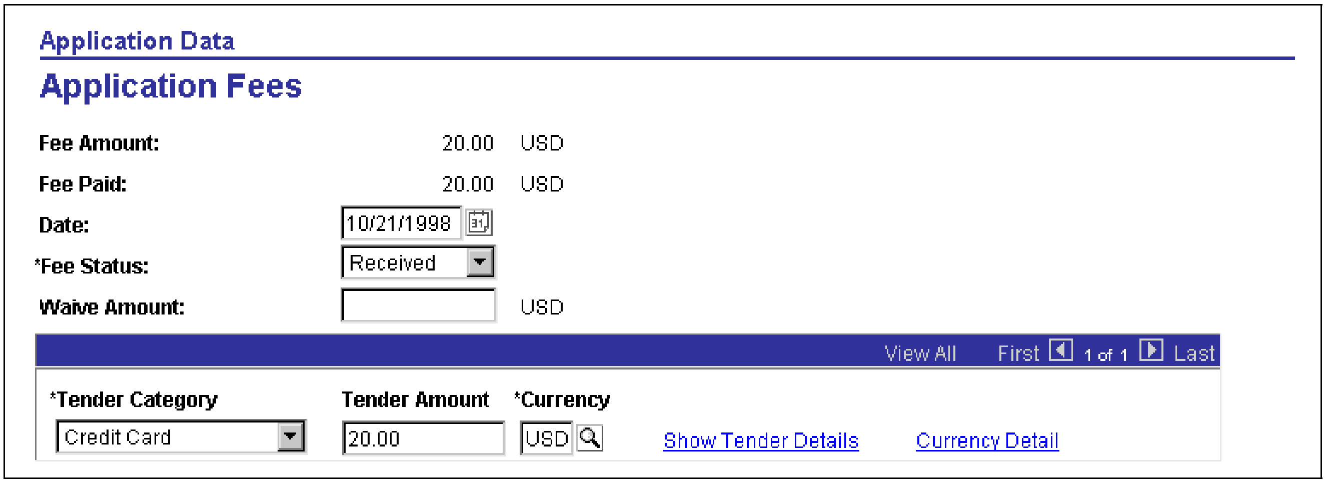
Notification Plan Specify whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Early Admit, Regular,* and *Rolling.*

Prior Application	Select this check box if this applicant previously applied to this career. This selection is useful for informational and reporting purposes.
Application Method	Select how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Application Service, Diskette, Hard Copy, Web Application, EDI,* and *OUAC.*
Housing Interest	Select any housing interest indicated by the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Commuter, Off Campus,* or *On Campus.*
Financial Aid Interest	Select this check box if this applicant is interested in financial aid for the programs to which he or she is applying. This field is useful for informational and reporting purposes. For example, the financial aid office can run reports listing those applicants interested in financial aid.
Complete	Select this check box if this application is not missing any information and is considered complete by your office.
Date	Enter the date that you marked this application as complete.
External Application Nbr (external application number)	Enter the external application number if you received this application from a service with its own application-numbering scheme.
Fee Type	Select the type of fee assigned to this application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), International,* and *Standard.* These fee types enable you to charge varying user-defined application fees.
Calculate Application Fees	After selecting the fee type, click this link to calculate the application fee owed. The Application Fees Calculation process runs and the Application Fees Page appears. The system displays the calculated fee amount. When you return to the Application Data page, the Status field in the Application Fee Information group box displays *Calculated.* If your application fee is set up to post to PeopleSoft Student Financials, the application fees calculation process runs when you click the Run button on the Application Fees page. A COBOL posting program runs which creates an account for this person in PeopleSoft Student Financials.
Transaction Summary	Click this link to view information about the application fee for this application. The Application Items Page appears.
Display Errors/Warnings	If any errors occurred during the calculation, click this link to view error details.
Go	Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

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

Application Fees Page

Access the Application Fees page.



Application Fees page

Date

The default for this date is your system date. Edit this field to reflect the date the application fee was entered or waived.

Fee Status

Select a status for this application fee. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Received, Pending,* and *Waived.* If you are receiving the application fee, change the status of the fee to *Received.* After you change the status to *Received,* the fields in the bottom section of the page become available.

Waive Amount

Enter the amount of the application fee that will be waived, if appropriate.

Tender Category

If the fee has been received, use this field to designate how the payment was received. You have the flexibility to receive payments in multiple tenders. For example, you can waive a portion of a fee and the student's remaining payment can be split between a credit card and a check. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Credit Card, Check,* or *Cash.*

If you select *Credit Card,* the Tender Details page appears so you can enter credit card information.

If you select *Check,* the Tender Details page appears so you can enter check information.

Tender Amount

After selecting a form of payment, enter the amount tendered.

Currency

Select the type of currency, such as *USD* (US Dollars).

Currency Conversion Details

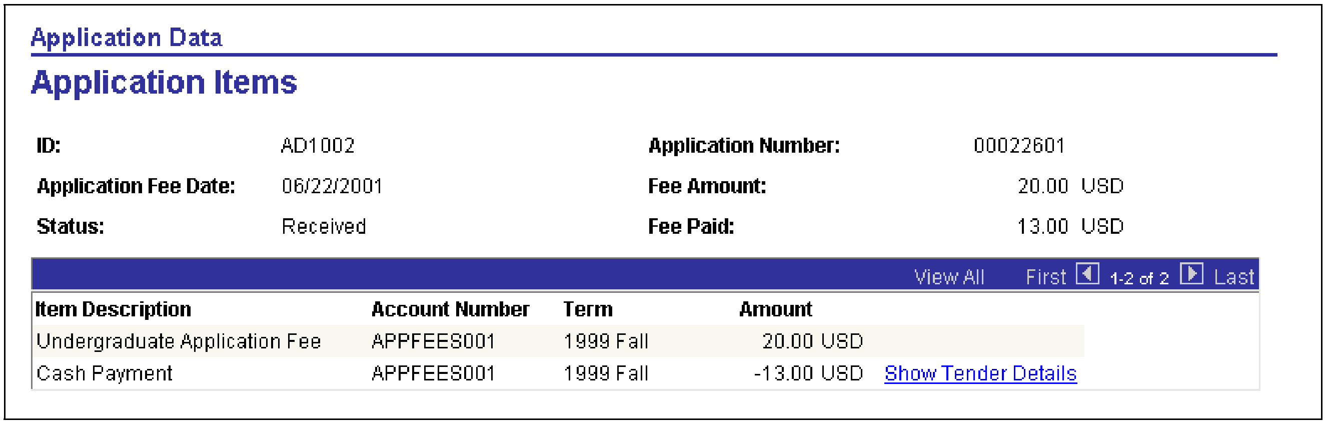
Click this link to obtain details on the currency conversion. The Currency Conversion Page appears.

Show Tender Details

Click this link to view details about the application fee. The Tender Details page appears.

Application Items Page

Access the Application Items page.



Application Items page

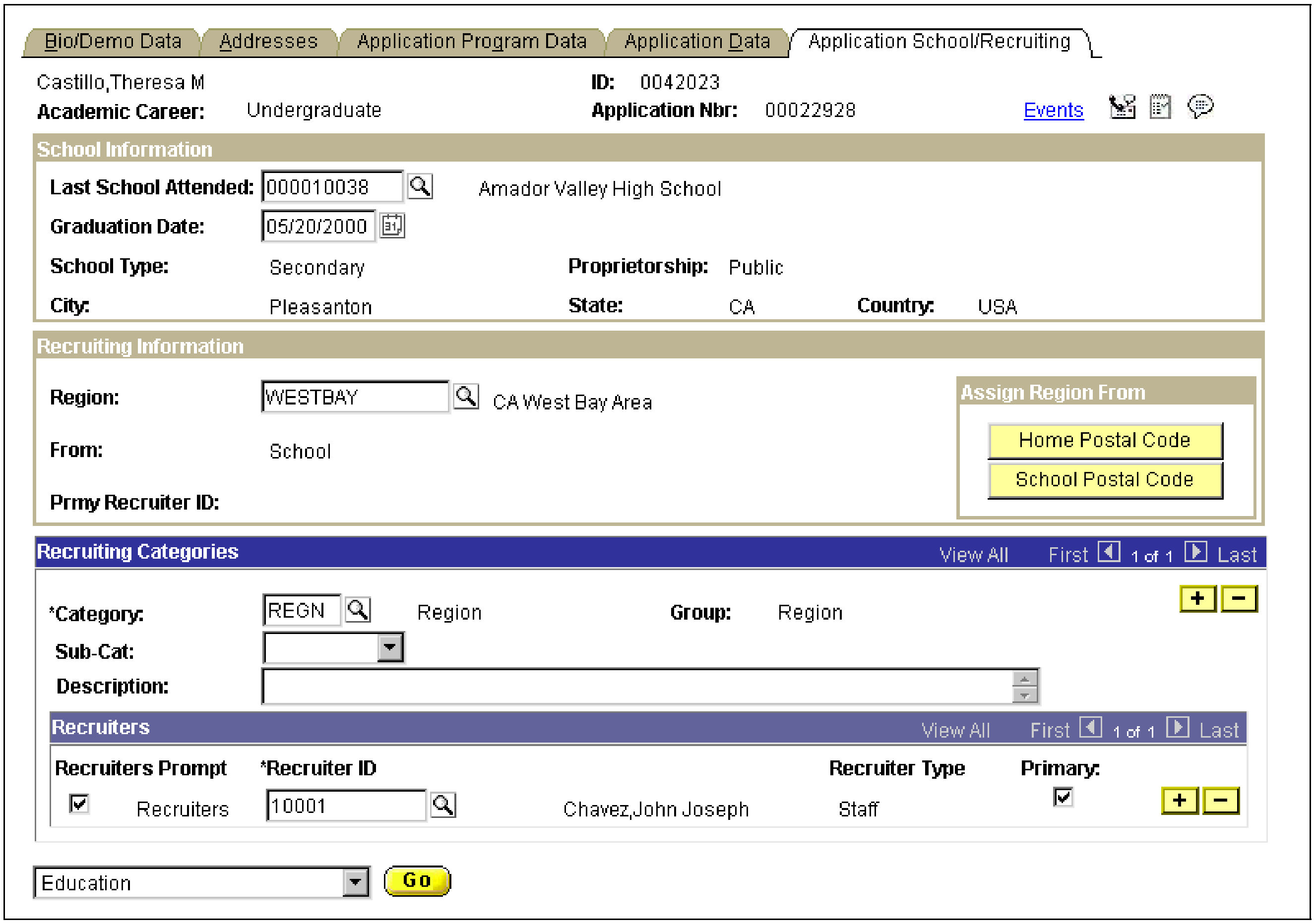
Errors If any errors occurred during the calculation, click the Display Errors button to view error details.

Show Tender Details Click this link to view tender details. The Tender Details Page appears.

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

Entering Recruiting Information for an Application

Access the Application School/Recruiting page.



Application School/Recruiting page

Note. If the applicant had a prospect record, and you selected the Move to Application option on the Prospect Recruiters page, and your setup dictates that data from the prospect record be copied to the application, the system automatically populates some of the fields on this page. For example, the Last School Attended and Graduation Date fields could be populated by the values in the matching prospect record.

School Information

Last School Attended

Select the last school attended for this applicant. Because a person might have attended several schools in his or her external academic career, it is helpful to know which school was attended most recently.

After you enter a school, you might receive a message informing you that this school will not be added to the Academic History record, depending on how your institution has set this parameter on the Installation - AD page. Schools are stored for academic history in the Education component. The school you store here is for recruiting and informational purposes.

Graduation Date

Enter the graduation date. A graduation date can be in the future if the person is still attending this school.

Recruiting Information

Region Select a region if you want to choose a region from the region tree manually. Only regions from your region tree are available for selection. Define regions on the Region Table page.

Home Postal Code Click this button if you want the system to assign a region based on the postal code in the applicant's home address. The system uses the tree manager to assign a region based on the postal code.

School Postal Code Click this button if you want the system to assign a region based on the applicant's last school attended postal code. The system uses the tree manager to assign a region based on the postal code.

From This display-only field shows you how this region was defined:

Region Tree: If you *manually* assigned a region.

Address: Assigned if you click theHome Postal Code button.

School: Assigned if you click the School Postal Code button.

Recruiting Categories

Use the fields in this group box to target the applicant for special recruiting efforts during the admissions process regarding this application.

Category Select a recruiting category for the applicant under this career and application. For example, in the previous screen example, this applicant is being recruited according to the geographic region of her school. Define recruiting categories on the Recruiting Category Table page. These same categories are used in both the recruiting and application processes to target and report on students.

If you plan to assign a recruiter to this applicant based on your region tree, you must enter a category of *REGN* (region). Only the recruiters assigned to the region appearing in the Region field will be available.

Group The group under which this category falls automatically displays when you move out of the Category field.

Sub-Category Select a recruiting subcategory, if desired. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), High, Low,* and *Medium.* A subcategory can be used to indicate the priority of this recruiting category.

Description Enter any descriptive information regarding the recruiting category.

Note. You can enter multiple recruiting categories and supporting information for an application.

Recruiters

This group box becomes available if you have entered a recruiting category. The recruiter assignment is tied to the recruiting categories. Use this section of the page to assign one or more recruiters, pertinent to this category, for the applicant.

Recruiters Prompt	Select this check box if you want *all* recruiters in your database to be available when you prompt on the Recruiter ID field, regardless of the recruiting category to which recruiters are assigned. Clear this check box if you want *only* the recruiters assigned to the current recruiting category to be available when you prompt on the Recruiter ID field. (Note that the *REGN* category works differently). If you are adding recruiters for the recruiting category *REGN,* you select only from recruiters who were assigned the region that appears in the Region field. If you entered the region according to the last school attended using the School Postal Code button; the Prompt Table field displays *Recruiters for School's Region.* Select the prompt to bring up any recruiters assigned to that school. If no recruiters are assigned to that school, then your choices are any recruiters assigned to the region. If you entered the region according to the applicant's home address using the Home Postal Code button, the Prompt Table field displays *Recruiters from Address Region.* Click the prompt to bring up all recruiters assigned to the region. If you manually chose the region from the region tree, all recruiters assigned a recruiting category of *REGN - Region* are available when you prompt for values on the Recruiter ID field. The Prompt Table display field in this case displays *Recruitment Category.*
Recruiter ID	Select the ID number of the recruiter that you want to assign to this applicant. The region tree determines which recruiters to make available for selection, based on the region that you assigned to the applicant. You can override the region tree selection by selecting theRecruiters Prompt check box. If selected, all recruiters for the academic career are available. You can assign an applicant multiple recruiters for any recruiting category.
Primary	Select this check box if this is the primary recruiter for this category. The ID of the person who has been marked primary displays in the Prmy Recruiter ID (primary recruiter ID) field. You can use this field to report on primary versus non-primary recruiters.
Events	Click this link to sign an applicant up for attendee events. The Attendee Events page appears.
Go	Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Note. Once you save the information on these pages, all modifications must be made on the Application Recruiters page in the Application Maintenance component.

Adding Communications, Checklists and Comments for Applicants

As mentioned before, the Communication, Checklist and Comment buttons appear next to the Application Number field on the Application Program Data, Application School/Recruiting, and Application Recruiters pages, and below the Dual Program field on the Application Program Data page.

By using the Communication, Checklist and Comment buttons from this component, you can transfer directly to the entry pages for communication, checklist, and comments and initiate recruiting and admissions related items.

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

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Using the 3C Engine”

Adding New Prospects and Applications with Quick Admit

PeopleSoft Recruiting and Admissions can take information concerning people enrolled from the PeopleSoft Student Records Quick Enroll process and at your discretion, create a prospect record and an application, or an application only for those people.

This section provides an overview of quick enroll and quick admit and discusses how to:

- Select which students you want to quick admit.
- Create applications for the group of quick-admitted students.

Understanding Quick Enroll and Quick Admit

The Quick Admit Use component, Quick Enroll component, and Quick Admit Process component are a variation on the fuller processes of admitting students and enrolling them into classes. Typically, you'll use these components in conjunction with each other to accelerate admissions and enrollment procedures where immediate formal processing is not required or is unavailable for students. In addition, collecting admissions information on students who have been quick enrolled might come in handy for various funnel reports.

The Quick Admit Use component and Quick Enroll component, when used together, enable you to rapidly add or update a student's personal data in your system; activate the student in an academic career, academic program, or term; and enroll the student in classes.

The Quick Admit Use component works concurrently with the Quick Admit Process component. Whenever you admit a student through the Quick Admit Use component, the system flags the student's record to indicate that the student has been admitted by this method. The system then places these records into a suspense table awaiting your action. Using the Quick Admit Process component, you can then run the Quick Admit Process (ADQCKADM) to create prospect records and applications for these flagged records in the suspense table. The Quick Admit Process component and Quick Admit Use component are not a replacement for the regular PeopleSoft Recruiting and Admissions functionality. You must use the Application Data pages for regular admissions.

You can use the Quick Admit Use component to add a new student's personal data record to your system, to activate a student into an academic career and an academic program within that academic career, and to activate a student into a specific term. By completing and saving the Quick Admit Use component, a student quickly becomes eligible for class enrollment. You can also use the Quick Admit Use component to update a new or continuing student's personal data record once the student already has an existing personal data record stored in the system. If you are entering new students into the system through the Quick Admit Use component and you click the Save button after entering the student's demographic data and program stack data, the system assigns the student a unique ID that remains associated with the individual in your database until you change or delete it. Keep in mind that each user has access to specific edit modes based on her or his security profile.

Important! To avoid creating duplicate IDs in your system, we strongly recommend that you use the search/match function to determine if an individual with the same data already exists in your database before adding the new individual.

For new students, you can use the Quick Admit component to enter the biographic, demographic, address, and program stack data about the student. When you save the component, the system:

- Assigns the new student an ID and creates a row for the student in the personal data table (PERSONAL_DATA).
- Activates the new student in the academic program that you select within the specific academic institution and academic career that you specify.
- Activates the new student in the term that you select, creating a row in the student term table (STDNT_CAR_TERM) for the student.

For continuing students, you can use the Quick Admit component to activate the student into a subsequent term; to maintain the student's biographic, demographic, and address data; or to activate the student into a new academic career. When you save the component, the system:

- Updates the row for the student in the personal data table (PERSONAL_DATA).

- Verifies whether the student has already been activated for the term, and if not, activates the student in the term, creating a new row in the student term table (STDNT_CAR_TERM) for the student.
- Activates the continuing student in the new academic program that you select within the specific academic institution and career that you specify when you are adding the student to a new academic career.

Once you have saved the student's personal data and activated the student into the term, the student is eligible for class enrollment. You can then use the Quick Enroll component to rapidly enroll students into the term. The system carries forward the key information (ID, academic institution, academic career, and term) and automatically opens the Quick Enroll component for the given student.

When you access the Quick Admit component, a dialog box prompts you to enter the key values of the admissions transaction. The key values are:

ID

In add mode, the system defaults the student's ID to *New.* For a student new to your system, you can use the default value to have the system assign the ID, or you can enter a new ID of your choice provided that it does not belong to another individual already in the system (on the PERSONAL_DATA table), or you can enter a student's existing ID.

In other modes, the system prompts you to search for an existing ID.

If you enter a new ID of your choice, you run the risk of disrupting the auto-numbering sequence that is included with the system. If you disrupt the auto-numbering sequence, a system administrator must correct the situation.

Academic Institution

Select the academic institution to which you want to quickly admit the student.

Academic Career

Select the academic career to which you want to quickly admit the student. Remember that academic careers are parents of academic programs. Therefore, when you select an academic program on the Program/Plan page within this component, the system displays academic programs based only on the academic career you select here.

Term

Select the term for which you want to activate the student. After you enter the required data for a student into the Quick Admit component and click the Save button, the system activates the student into the term that you specify. This functionality works for both new and continuing students.

To use the Quick Admit/Quick Enroll feature for a specific term, you must already have defined your academic term calendar for the academic programs within that term.

Note. If the student has already been activated in an academic program and you try to activate the student into a term for that academic program, make sure that the effective date of the student's academic program activation is after the start date of the term. Otherwise, you'll receive a processing error.

OK

Click to open the component with the specified key values.

The Quick Admit process is a two-step, two-page process. Use the first page in the Quick Admit Process component, the Selection Criteria page, to select a group of students who have been admitted through the Quick Admit Use component. Use the second page in the Quick Admit process component, the Assignment Criteria page, to specify whether to create historical prospect and application records or new prospect and application records, or both.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Processing Class Enrollment Transactions”

Pages Used to Add New Prospects/Applications with Quick Admit

Page Name	Object Name	Navigation	Usage
Quick Admit - Bio/Demo Data (quick admit - biographic/demographic data)	SA_BIO_DEMO_DATA3	Manage Student Records, Manage Academic Records, Use, Quick Admit, Bio/Demo Data	Enter or update a student’s biographic and demographic information.
Quick Admit - Addresses	BIO_DEMO_ADDRESSES	Manage Student Records, Manage Academic Records, Use, Quick Admit, Addresses	Enter or update a student’s address information.
Quick Admit - Program/Plan	PROGRAM_PLAN	Manage Student Records, Manage Academic Records, Use, Quick Admit, Program/Plan	For new students, select the primary academic program for which you want to activate the student in a term and enter other program stack information. For continuing students, view the student’s career number and primary academic program or add the student to a new academic career. If you want make any changes to a new or continuing student’s program stack information after you save the student to your system, you must use the Student Program/Plan component.
Quick Admit - Selection Criteria	QUICK_ADMIT_SELECT	Manage Student Records, Manage Academic Records, Process, Quick Admit, Selection Criteria	Enroll students into classes without going through a formal admissions process.
Quick Admit - Assignment Criteria	QUICK_ADMIT_CREATE	Manage Student Records, Manage Academic Records, Process, Quick Admit, Assignment Criteria	Create applications for the group of quick-admitted students that you selected in the first page of this component.

Entering Biographic and Demographic Data

Access the Quick Admit - Bio/Demo Data page.

This page is part of the Quick Admit/Quick Enroll feature, which enables you to rapidly admit students into your institution and enroll those students into classes. The system saves any biographic and demographic data that you add or change to the personal data table (PERSONAL_DATA_TBL). You can maintain a student's personal data through either the Quick Admit component or the Bio/Demo Data component found in PeopleSoft Campus Community.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Entering Address and Phone Data

Access the Quick Admit - Addresses page.

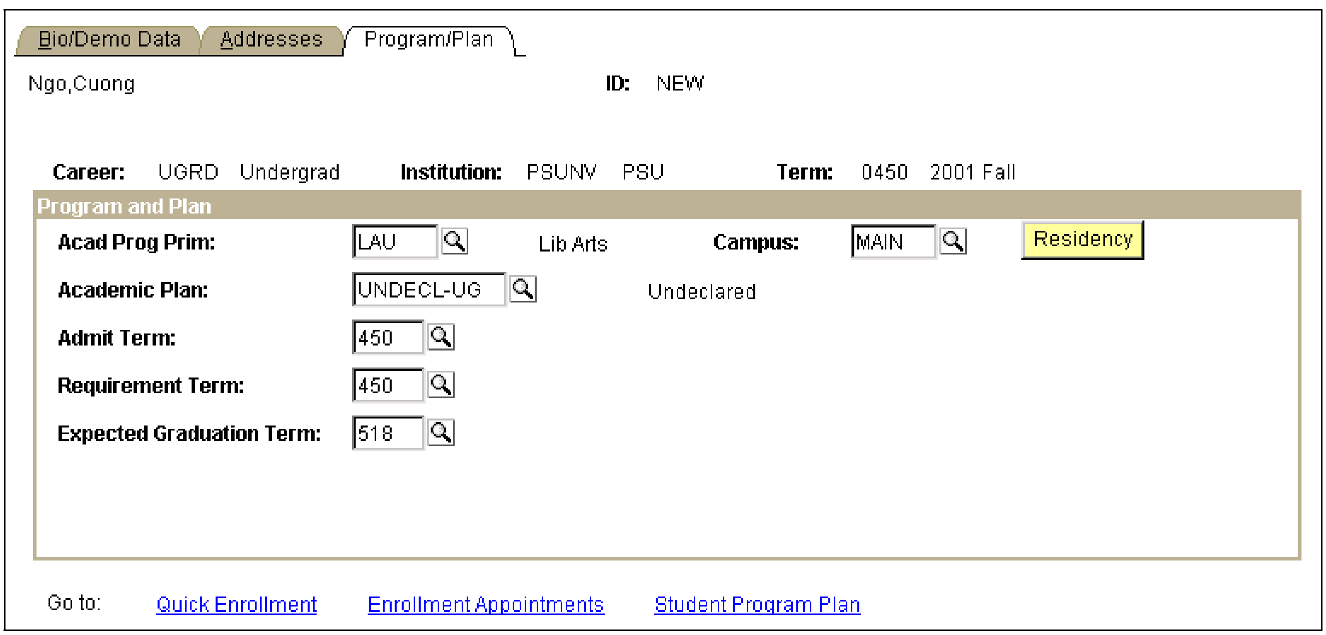
This page is part of the Quick Admit/Quick Enroll feature, which enables you to rapidly admit students into your institution and enroll them into classes. The system saves the address data that you add or change to the personal data table (PERSONAL_DATA_TBL). You can maintain a student's personal data through either the Quick Admit component or the Bio/Demo Data component found in PeopleSoft Campus Community.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data"

Entering or Viewing Academic Program Data

Access the Quick Admit - Program/Plan page.



Quick Admit - Program/Plan page

Entering Program Stack Data for New Students

When you are adding a new student to your system, the following fields appear:

Acad Prog Prim (academic program primary)
Select the primary academic program into which you want to matriculate and activate the student. The system prompts you with academic career values specific to the academic career that you selected as a key upon entering the component.

Campus
Select the campus on which the student is going to take the primary academic program.

Academic Plan
Select the student's primary academic plan within the primary academic program. If a student requests multiple academic plans within the academic program, you must enter the additional academic plans through the Student Program/Plan component.

Admit Term
The term in which you are matriculating the student into the academic program. The admit term normally defaults from the PeopleSoft Recruiting and Admissions matriculation process. However, because you are performing a quick activation and are going to matriculate the student through this Quick Admit component, you must therefore select the admit term for the primary academic program that you have specified.

Requirement Term
The requirement term indicates to the system which term's degree progress requirements apply to the student for the primary academic program that you have specified. The system, by default, sets this value to the Admit Term value.

Expected Graduation Term
Select the term in which you expect the student to graduate. Define term values on the Term Table page.

Residency
Click to display the Residency Official page. You can use this page to record residency information that has been verified by your institution.

Quick Enrollment
Click to access the Quick Enroll component, where you can process enrollment transactions for the student.

Enrollment Appointments
Click to access the Appointments component, where you can add and update enrollment appointments for the student.

Student Program Plan
Click to access the Student Program/Plan component, where you can make any changes to a new or continuing student's program stack information after the student has been saved to your system.

Viewing Program Stack Data After Saving the Component

When you are updating a new or continuing student's records, only the following fields appear:

Student Career Nbr (student career number)
The system uses the student career number to differentiate between academic programs within the same academic career. For students with multiple academic programs within the same academic career, you must select the student career number for which you want to activate the student into the term you have specified. If the student has only one student career number in a specific academic career, the field is unavailable for edit.

Prim Prog (primary program)
The system displays the primary academic program associated with the student career number. The primary academic program that appears

is the academic program into which the system activates the student for the term that you have specified.

See Also

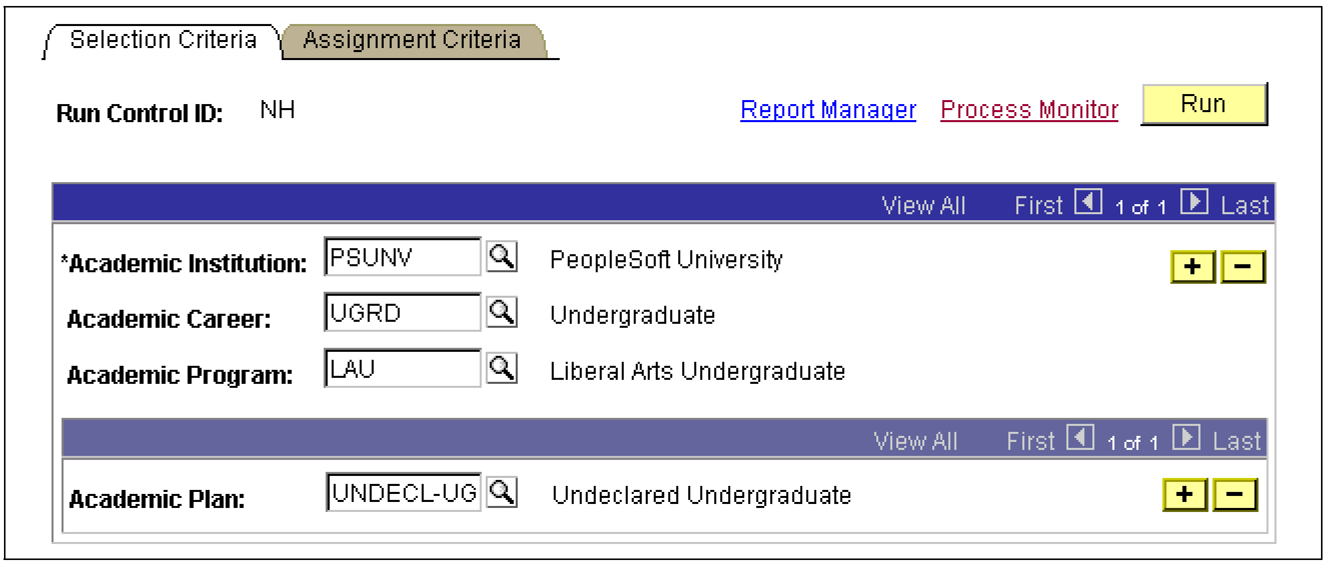
PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data"

Chapter 14, "Adding and Updating Applications," Understanding Quick Enroll and Quick Admit, page 177

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Identification Data," Entering Residency Data

Selecting Your Criteria for Quick Admit

Access the Quick Admit - Selection Criteria page.

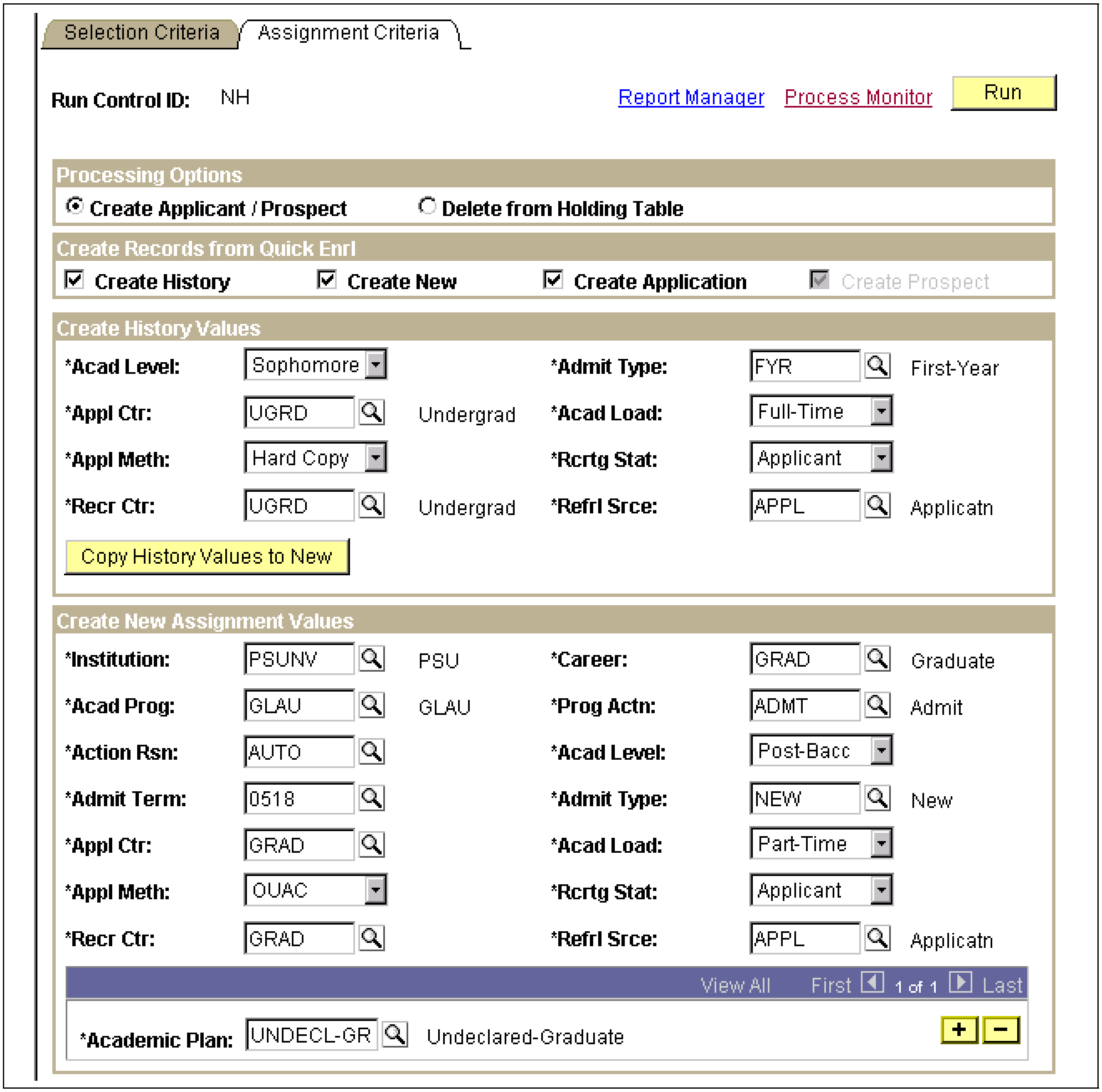


Quick Admit - Selection Criteria page

Academic Institution	Select the academic institution from which you want to select quick-admitted students. You can enter multiple academic institutions.
Academic Career	Select the academic career from which you want to select quick-admitted students. You can enter multiple academic careers.
Academic Program	Select the academic program from which you want to select quick-admitted students. You can enter multiple academic programs.
Academic Plan	Select the academic plan from which you want to select quick-admitted students. You can enter multiple academic plans.

Assigning Criteria for Quick Admit

Access the Quick Admit - Assignment Criteria page.



Quick Admit - Assignment Criteria page

Create Applicant/Prospect Select this option to create prospect and application records for the selected group of students.

Delete From Holding Table Select this option to take the selected group of students and delete them from the holding table. Selecting this option will disable the remaining fields on the page. If this is the desired option, click the Run button to initiate this process.

Create History Select this check box to create history records for the group of students you have selected. The system adds the students to the prospect and applicant tables even though they bypassed the normal admissions process. The data created is based on the data entered on the Quick Admit pages.

Selecting this check box ensures that admissions information is available for these people for your admissions reporting purposes.

Create New Select this check box to create a new set of prospect and application records for the selected group of students. “New” means that prospect and application records will be created based on the parameters in the Assignment Values group box.

Create Application Select this check box to create applications for the selected group of students. This field is available if you select the Create New check box.

Create Prospect Select this check box to create prospect records for the selected group of students specified on the Selection Criteria page. If the Create Application check box is selected, the availability of this field is determined by the settings on the Installation Defaults - AD page.

The following fields appear, regardless of whether you choose Create History or Create New:

Acad Level (academic level) Select the academic level that you want to assign to the selected group.

Admit Type Select the admit type that you want to assign to selected group.

Appl Ctr (application center) Select the application center to be populated for each application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page.

Acad Load (academic load) Select the academic load that the applicants will be taking on. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Full-Time* and *Part-Time.*

Appl Meth (application method) Select how or in what form the application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Application Service, Diskette, Hard Copy, Web Application, EDI,* and *OUAC.*

Rcrtg Stat (recruiting status) Select the recruiting status that will be populated on the prospect record of this applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Applicant, Inactive, Inquiry, Prospect,* and *Suspect.*

This field appears only if the Create Prospects field on the Installation – AD page is set to *Yes.*

Recr Ctr (recruiting center) Select the recruiting center that is responsible for this particular program on the prospect record. Define recruiting centers on the Recruiting Center Table page.

This field appears only if the Create Prospects field on the Installation – AD page is set to *Yes.*

Refrl Srce (referral source) Select the appropriate referral source that will be populated on the prospect record. A referral source indicates how this person became a prospect. In other words, it is a high-level indicator of how your institution came into contact with the person. For example, a referral source could be *Drop-In, Campus Event,* or *College Fair.* Define referral sources on the Referral Source Table page.

	This field appears only if the Create Prospects field on the Installation – AD page is set to *Yes.*
Copy History Values to New	Click to transfer values entered for Create History to the corresponding fields in the Create New section. This minimizes data entry.

The following fields are associated solely with the Create New option:

Institution	Select the academic institution that you want to assign to the selected group.
Career	Select the academic career that you want to assign to the selected group.
Academic Plan	Select the academic plan that you want to assign to the selected group of students.
Acad Program (academic program)	Select the academic program that you want to assign to the selected group.
Prog Actn (program action)	Select the program action that you want to assign to the selected group.
Action Rsn (action reason)	Select the action reason that you want to assign to the selected group.
Admit Term	Select the admit term that you want to assign to the selected group.

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

Students who were processed are automatically deleted from the holding file, so it is not necessary to run the Delete from Holding Table process.

Loading Applications from External Test Score Data

If application data is included in your LAW, AMCAS, or ADA external test score data loads, you can load the data as new applications. The data used to create new applications comes from the Additional Candidate Information data posted to the following pages:

Test	Page Where Data Comes From
LAW	LSAC Application Information
AMCAS	AMCAS Application Information
ADA	ADA Application Information

Once the external application data is posted to your database, you are ready to run the Create Application Via Test Score Data process.

Note. Applications are created for all records posted to the Additional Candidate Application Information pages listed in the previous table if the Post option contains the *Select for Application Creation* value. After the Create Application Via Test Score Data process runs, the process updates the Post option to *Created Application* if the process created an application for the person, or *Duplicate Application* if a potential duplicate was found and the program did not create an application.

You must set up some initial parameters before activating the process.

To run the Create Application Via Test Score Data process:

1. Indicate from which test score data load the application will come.
2. Set up your application program parameters.
3. Set up your application data parameters.
4. Set up your application recruiting data parameters and run the Create Application Via Test Score process.

See Also

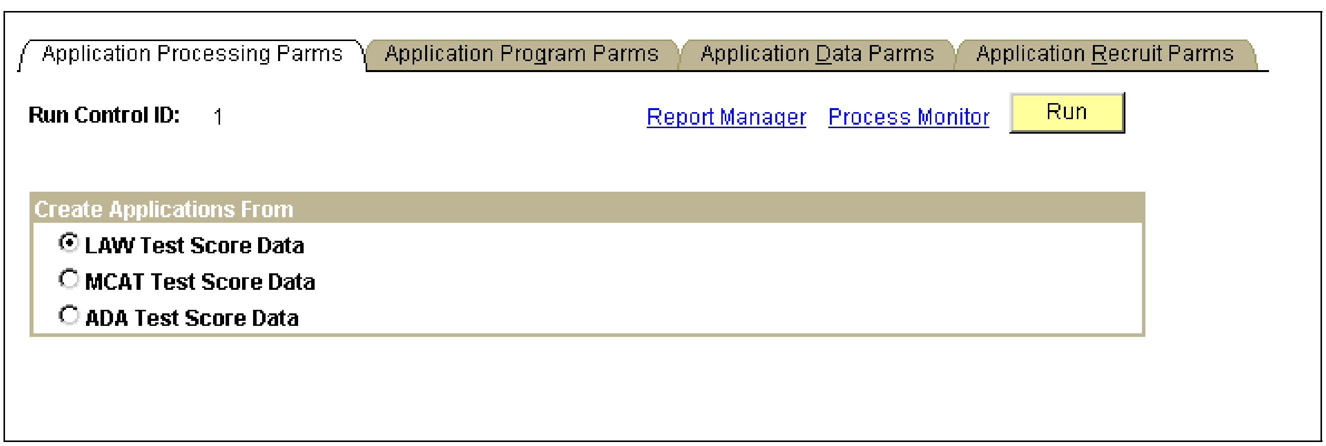
Chapter 17, “Processing External Test Score Data,” page 265

Pages Used to Load Applications from External Test Score Data

Page Name	Object Name	Navigation	Usage
Application Processing Parms (application processing parameters)	ADM_APPL_PROC_PARM	Develop Enrollment, Process Applications, Process, Create App Via Tst Score Data, Application Processing Parms	Indicate which type of application you want to load.
Application Program Parms (application program parameters)	ADM_PROG_PARMS	Develop Enrollment, Process Applications, Process, Create App Via Tst Score Data, Application Program Parms	Set up default program parameters for the new applications. The values you select for the fields on this page are inserted on the Application Program Data page when the new applications are loaded.
Application Data Parms (application data parameters)	ADM_APPL_PARMS	Develop Enrollment, Process Applications, Process, Create App Via Test Score Data, Application Data Parms	Set up default application data parameters to be filed in on new applications. The values you select for the fields on this page are inserted on the Application Data page when the new applications are loaded.
Application Recruit Parms (application recruit parameters)	ADM_RECRUIT_PARMS	Develop Enrollment, Process Applications, Process, Create App Via Tst Score Data, Application Recruit Parms	Set up default application recruiting parameters to be filled in on new applications. The values you select for the fields on this page are inserted on the Application School/Recruiting page when you load the new applications.

Selecting the Test Score Data Load

Access the Application Processing Parms (application processing parameters) page.

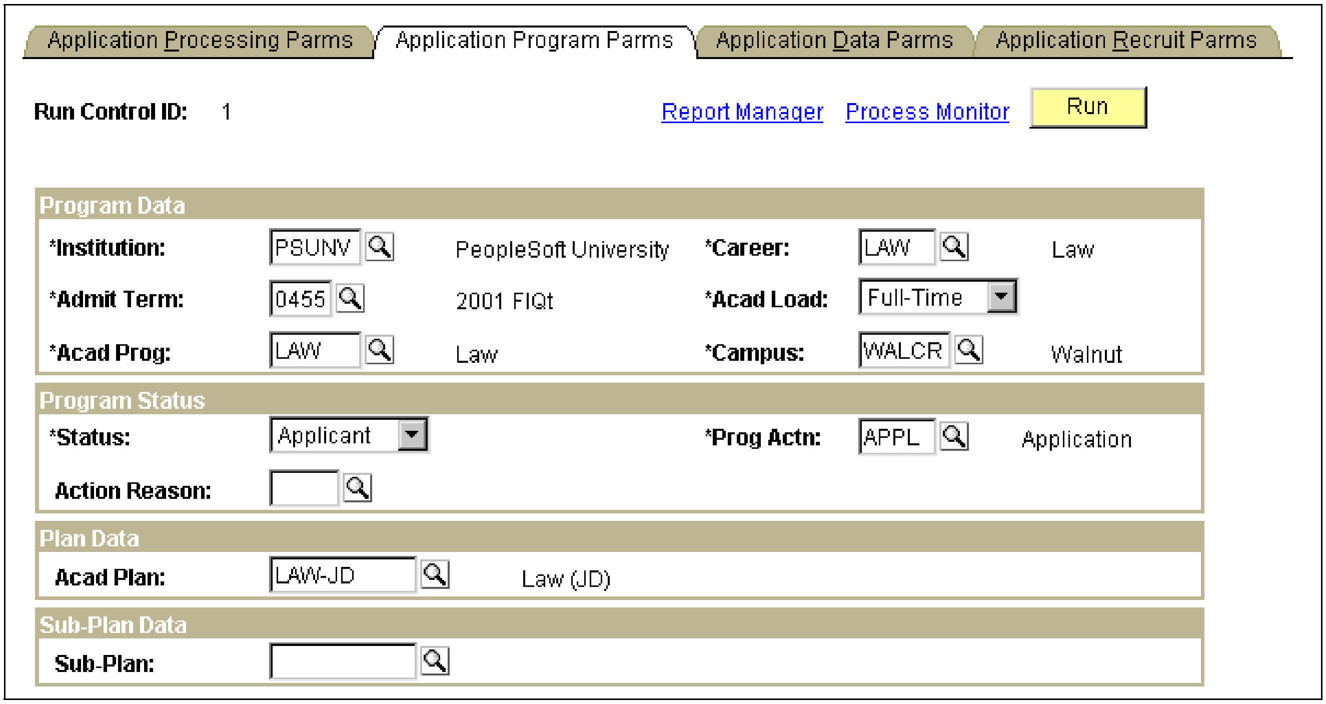


Application Processing Parms page

Select the type of external test data from which you want to load applications: *LAW Test Score Data, MCAT Test Score Data,*or*ADA Test Score Data.*

Setting Up the Application Program Parameters

Access the Application Program Parms (application program parameters) page.



Application Program Parms page

Note. Some of the fields on this page might populate automatically according to your user defaults. You can edit those fields as needed.

Admit Term	Select the admit term for these applicants. Define admit terms on the Term Values Table page.
Acad Load (academic load)	Select the academic load for these applicants. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Program (academic program)	Select the academic program for these applicants. Only the academic programs for the chosen career appear in the prompt list. Define academic programs on the Academic Program Table page.
Campus	Select the campus being applied to within your institution. Define campuses on the Campus Table page.
Status	Select the person's program status. This value is entered on the application. Values for this field are delivered with your system as translate values. You can modify these translate values.
Prog Actn (program action)	Select the program action that you want entered regarding the program on these applications. Because the intent of this process is to create applications,

not all program actions are available when you prompt on this field. Program actions are stored on the Program Action Table page.

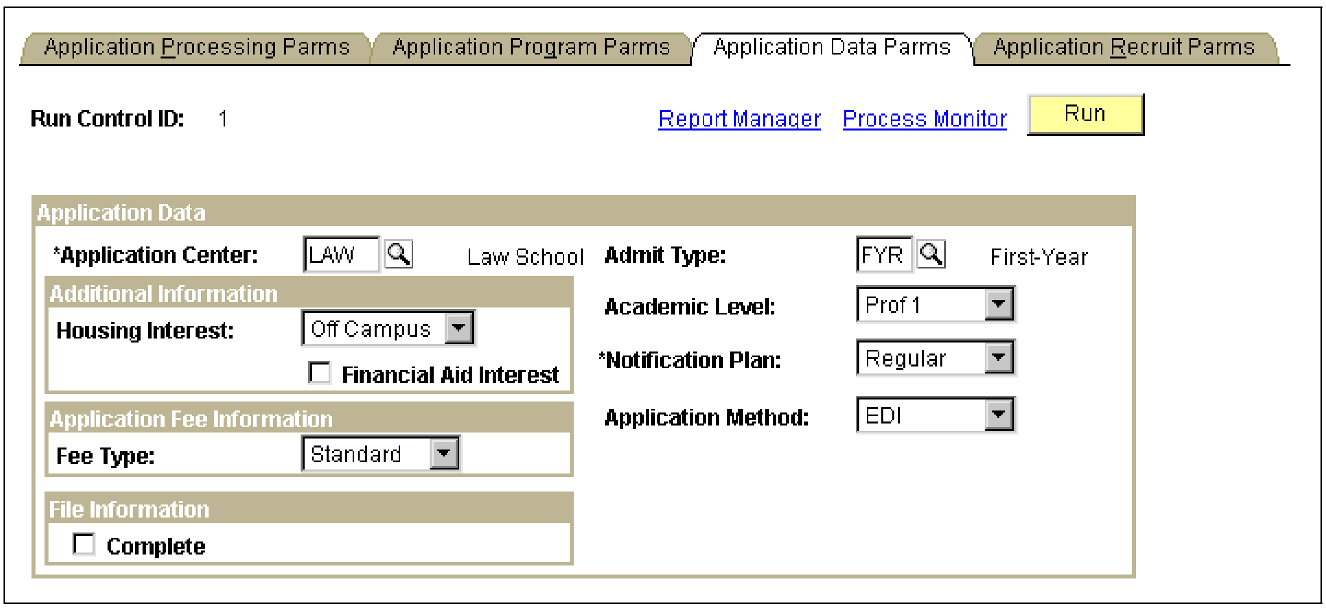
Action Reason If there are action reasons associated with the program action that you selected, you can select the appropriate reason value. Define action reasons on the Action Reason Table page.

Acad Plan (academic plan) Select an academic plan for these applications. Define academic plans on the Academic Plan Table page.

Sub-Plan Select a sub-plan for these applications. Define academic sub-plans on the Academic Sub-Plan Table page.

Setting Up the Application Data Parameters

Access the Application Data Parms (application data parameters) page.



Application Data Parms page

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

Application Center Select the application center for these applications. The only values available are those that fall under the academic career entered on the Application Program Parameters page.

Housing Interest Select a housing interest, if applicable. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Commuter, Off Campus,* and *On Campus.*

Financial Aid Interest Select this check box if you want the system to select the corresponding check box on the newly created applications. This field is useful for informational and reporting purposes. For example, your financial aid office can run reports listing those applicants interested in financial aid.

Fee Type Select the fee type you want entered for these applications. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Internatnl* (international) and *Standard.*

Complete Select this check box to mark these applications complete.

Admit Type Select the admit type that you want entered for these applications. Define admit types on the Admit Type Table page.

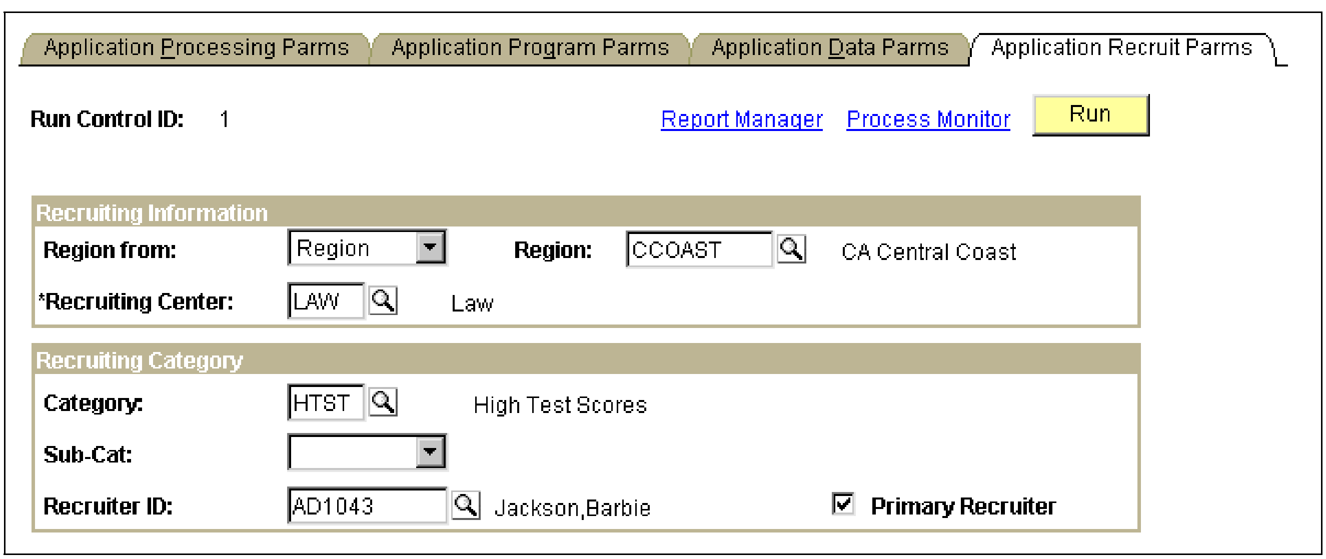
Academic Level Select the academic level you want entered for these applications. Values for this field are delivered with your system as translate values. You can modify these translate values.

Notification Plan Select the notification plan that you want entered for these applications. A notification plan specifies whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Early Admt* (early admit), *Regular,* and *Rolling.*

Application Method Select the application method that you want entered for these applications. Application methods indicate how or in what form you received these applications. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Appl Serv* (application server), *Diskette, EDI* (electronic data interchange), *Hard Copy, OUAC* (Ontario Universities Application Centre), *Web Appl* (web application).

Setting Up the Application Recruiting Parameters

Access the Application Recruit Parms (application recruit parameters) page.



Application Recruit Parms page

Region from	Select how you would like the region to be assigned to these applications. The delivered values are *School, Address,* and *Region.* *School:* Not a valid choice. You will get an error message if you select this value. *Address:* Select this value if you want the system to automatically assign a region to these applications according to the applicant's home address. If you choose *Address,* the Region field is not available because the system will assign the region based on the person's home address or the address of the last school attended. *Region:* Select this value if you prefer to choose a region here to be entered on all applications. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Region	Select a region to be entered on these applications. This field is available when you select *Region* in the Region from field. Define regions on the Region Tree page.
Recruiting Center	If you have indicated in your installation setup that you want prospect records to be created for applications that come in without existing matching prospect records, you must enter a recruiting center here to be added to the new prospect record. Define recruiting centers on the Recruiting Center Table page.
Category	Select a recruiting category If you want a recruiting category entered on these applications. The recruiting categories available are based on the academic career that you selected.
Sub-Category	Select a recruiting subcategory for these applications, if desired. Subcategories indicate your level of interest in the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *High, Low,* and *Medium.*
Recruiter ID	If you have selected a recruiting category and you want a recruiter assigned to these applications under the chosen category, enter the desired recruiter identification number in this field. Only recruiters assigned to this academic career are available.
Primary Recruiter	Select this check box if you want the recruiter that you selected to be the primary recruiter for these applications.

Click the Run button to run the Generate Test Score Appl Data process at user-defined intervals.

When this process runs, the system looks to the defaults you have set up on the Installation Defaults - AD page regarding moving prospect data to an application record, updating and adding prospect records and application matching criteria.

Note. To view the applications posted for a person, use the Application Maintenance component, or for a summary of the applications, see the Application Summary page.

See Also

Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 19

Updating Applications

Once you have entered and saved an application, you must use the Application Maintenance component to update the application. Use the Application Maintenance component to add or edit bio/demographic, address, program, recruiting data and more. You can also use this component to calculate an application fee, calculate an enrollment deposit, and matriculate an applicant.

Data in this component is stored at the *application* level, as opposed to the applicant or program level. This data is relevant to all academic programs being applied to with this application. You can enter and edit information in this component.

This section lists prerequisites and discusses how to:

- Update applicant biographics and demographics.
- Update or add applicant addresses.
- Update or add application program data.
- Capture student response why the student selected another institution.
- Add a program to an existing application.

Note. Most of the fields in this component default from the Application Entry component. You can edit any fields in this component or add values to those that have not yet been entered.

Prerequisites

Before you can edit or add any additional information in the Application Maintenance component, an application must first be entered into the system through the Application Entry component.

The Process Applications, Application Maintenance component is the third of three very similar components:

- Recruit Prospective Students, Prospect Data component.
- Process Applications, Application Entry component.
- Process Applications, Application Maintenance component.

For example, all three components have a Bio/Demo (biographic/demographic) page, an Addresses page, and other pages with similar names such as Prospect Academic Program Data page and Application Program Data page. You use these components to enter or maintain similar information at different times in your business process: for prospects, for entering application data, and for maintaining application data (discussed in this chapter).

Pages Used to Update Applications

Page Name	Object Name	Navigation	Usage
Application Program Data	ADM_APPL_PROG_MNT	• Develop Enrollment, Evaluate Applicants, Use, Application Maintenance, Application Program Data • Develop Enrollment, Process Applications, Use, Application Maintenance, Application Program Data	Edit or update program and plan data for an application. You can also create an enrollment deposit and matriculate an applicant from this page. *All* applications must be tied to an academic career and program. Any lower level tracking depends on your office's policies.
Application Data	ADM_APPL_DATA	• Develop Enrollment, Evaluate Applicants, Use, Application Maintenance, Application Data • Develop Enrollment, Process Applications, Use, Application Entry, Application Data • Develop Enrollment, Process Applications, Use, Application Maintenance, Application Data	Update information for an application.
Application School/Recruiting	ADM_APPL_RECRUIT	• Develop Enrollment, Evaluate Applicants, Use, Application Maintenance, Application School/Recruiting • Develop Enrollment, Process Applications, Use, Application Entry, Application School/Recruiting • Develop Enrollment, Process Applications, Use, Application Maintenance, Application School/Recruiting	Update or add recruiting information data. See Chapter 14, "Adding and Updating Applications," Entering Recruiting Information for an Application, page 172.
Application Student Response	ADM_APPL_STDNT_RSP	• Develop Enrollment, Evaluate Applicants, Use, Application Maintenance, Application Student Response • Develop Enrollment, Process Applications, Use, Application Maintenance, Application Student Response	Capture the reason why a prospect or applicant chose to attend another institution and what institution he or she will be attending.

Page Name	Object Name	Navigation	Usage
Program Addition	ADM_APPL_ADD_PROG	Develop Enrollment, Process Applications, Use, Program Addition, Program Addition	Add a program to an existing application if you have already created an application number for that person within the same career. This page is only for *adding* an academic program and program-related information. You perform all *modifications* to existing academic programs using the Application Program Data page in the Application Maintenance component.

Updating Applicant Bio/Demographics

Use the Bio/Demo Data page to edit demographic data. You can update any bio/demo data regarding an applicant that was entered in the Application Maintenance component

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio /Demographic Data," Entering Basic Bio/Demo Data

Updating or Adding Applicant Addresses

Use the Addresses page to edit or add addresses.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio /Demographic Data," Entering Addresses Data

Updating or Adding Application Program Data

Access the Application Program Data page.

Sequence The default of the sequence is 1. The sequence appears in the field to the right of the Effective Date field.

When you enter more than one row for the same effective date, the system automatically increments the sequence.

The following table summarizes how the effective date and related sequence function, depending on your action.

Action/Current Row (cursor position) Effective Date	New Row Effective Date Defaults To *	New Row Effective Sequence Defaults To **
Add current row (less than or equal to system date).	System date.	Increments by one from sequence on preceding row.
Add future dated row (greater than system date).	Date of preceding future row if one exists, otherwise defaults to system date.	Increments by one from sequence on preceding row if one exists, otherwise *1* is the default sequence number.
Insert history row (date is less than current row and system date).	Date of preceding history row if one exists, otherwise defaults to system date.	Increments by one from sequence on previous history row if one exists, otherwise *1* is the default sequence number.

* The date can be edited.

** The sequence can be edited. Note that the number zero displays as a blank space in this field, however the value will display as a zero when the row is copied over to the Student Plan table.

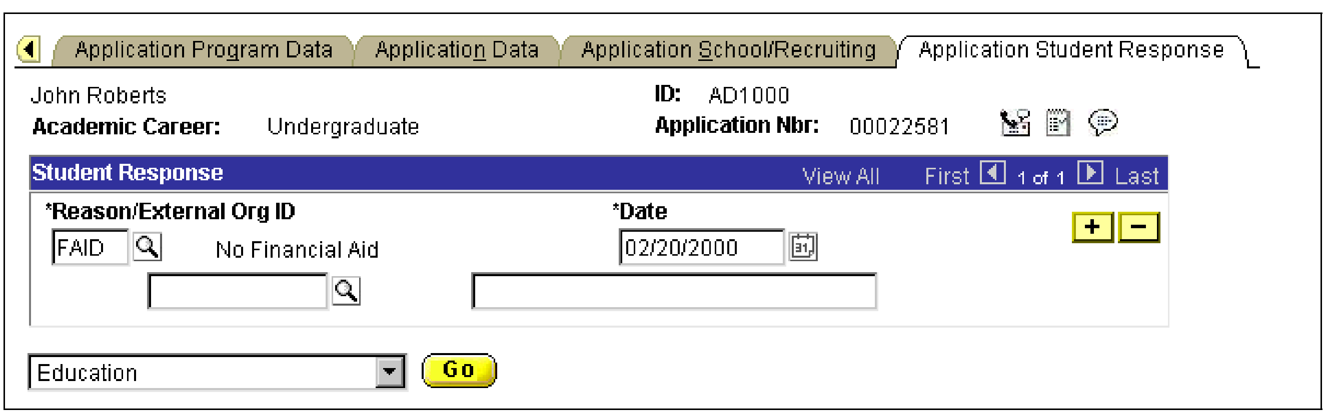
Program Action If you are adding a new row, the Program Action field is empty, because the system is assuming you are here to update the status of this application. Edit or add the appropriate program action value. Program actions are stored on the Admissions Action Table page.

See Also

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 165

Capturing Student Response – Why Student Selected Another Institution

Access the Application Student Response page.



Application Student Response page

Student response information is important information your institution might want to track and report on. You can choose from a series of adapted reason response codes that your institution can set up to capture the exact information you want to track. However, you can use this page however you want to. For example, you can capture why students chose *not* to attend a particular school and where they are going. Or instead, you can capture the reason why a student *did* select your school. If a student has multiple applications on file, each application can have its own corresponding student response.

Reason

Select a Student Response Reason code, for example *FAID* (financial aid). Define reason codes on the Response Reason Table page.

External Org ID (external organization ID)

Select the external organization ID of the institution that the student has decided to attend. The system displays the external organizations for which you selected the Student Response - School Type check box.

You can enter a free-form institution name by tabbing out of the External Org ID field without selecting a value and entering an institution in the field to the right. This way, the institution does not have to enter in all possible external institution codes. To enter a free form institution, you must select the Free Form Institution check box on the Installation – AD page.

Date

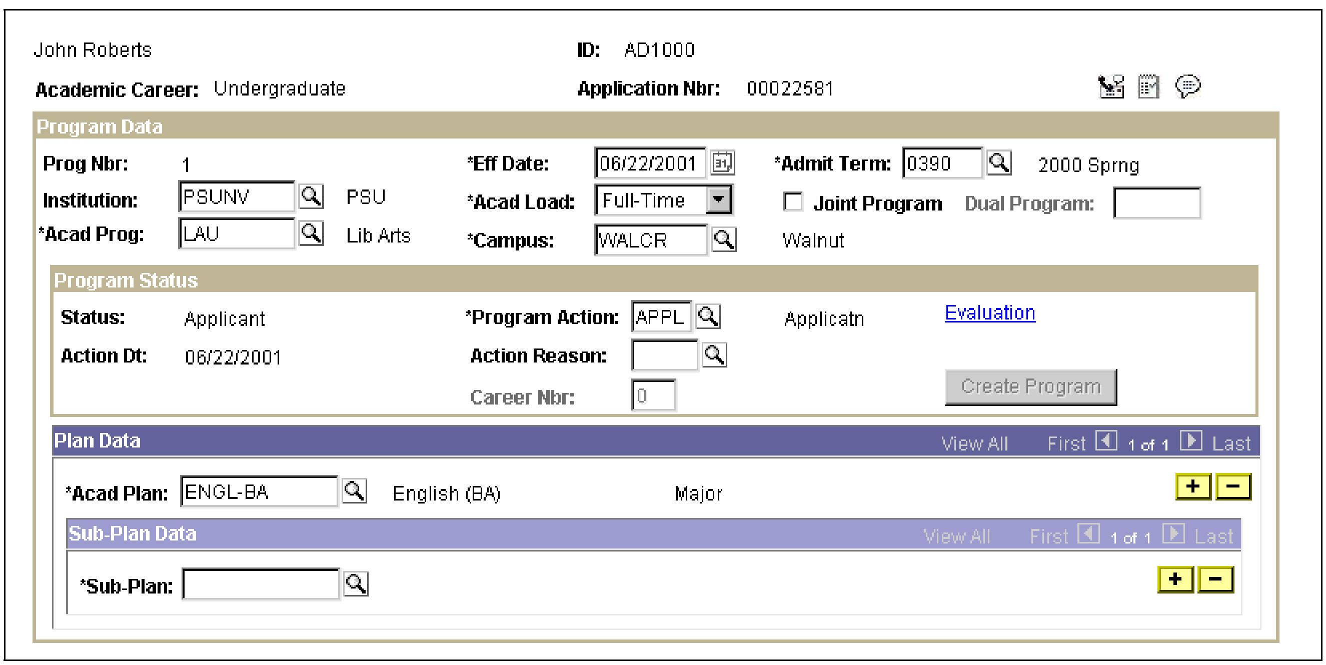
The default date is your system date.

See Also

Chapter 3, “Setting Up Prospects,” Setting Up Student Response, page 32

Adding a Program to an Existing Application

Access the Program Addition page.



Program Addition page

Once you have added an additional program, you maintain it through the Application Program Data page in the Application Maintenance component. You are prompted to choose the appropriate program number when accessing the Application Program Data page. To edit a different academic program for that application, you would need to click the Return to the Search button and choose the correct program number.

See Also

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 165

Viewing Application Summary Information

This section discusses how to view application summary information.

Pages Used to View Application Summary Information

Page Name	Object Name	Navigation	Usage
Application Summary	ADM_APPL_SUMM	• Develop Enrollment, Evaluate Applicants, Inquire, Application Summary, Application Summary • Develop Enrollment, Process Applications, Inquire, Application Summary, Application Summary	View summary information about any application stored for an applicant.
Application Detail	ADM_APPL_SEC	Click the Application Detail link on the Application Summary page.	View application detail information.

Calculating Application Fees in Batch

This section discusses how to calculate application fees in batch.

Pages Used to Calculate Application Fees in Batch

Page Name	Object Name	Navigation	Usage
Batch Application Fees	RUNCTL_SFPBAAPP	Develop Enrollment, Process Applications, Process, Batch Application Fees, Batch Application Fees	Calculate application fees for a group of applicants. The Batch Application Fees process updates each applicant's application fee status on the Application Data page to *Completed.* The process also updates each applicant's customer account in PeopleSoft Student Financials if appropriate.
Application Fees (Batch)	APP_FEE_CALC	Develop Enrollment, Process Applications, Inquire, Application Fees (Batch), Application Fees (Batch)	View application fee information generated by the Batch Application Fees process. You must first run the Batch Application Fees process via the Batch Application Fees page.

Calculating Application Fees in Batch

Access the Batch Application Fees page.

Batch ID The Batch Application Fees process assigns a batch ID once you initiate the process.

Academic Institution, Application Center, and **Admit Term** Enter an academic institution, application center, and admit term. The Batch Application Fees process calculates application fees for the applicants that the process selects using this criteria.

Display Application Fees Click this link to view the application fees for each applicant after you have run the Batch Application Fees process. The Application Fees (Batch) page appears.

Click the Run button to run the Batch Application Fees process at user-defined intervals.

Recording the Basis of Admission

This section discusses how to:

- Define basis of admission codes.
- Assign basis of admission codes to applicants.

You can set up basis of admission codes that represent general admission criteria—such as ACT test score, grade point average, or interview—then link the code or codes to applicants or students. You can also print the basis of admission on admission offer letters and transcripts.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

Winword Merge Field	PeopleSoft RECORD.FIELD
BasisAdmit	ADM_BASIS_ADMIT.BASIS_ADMIT_CODE
BasisAdmitDL	ADM_BASIS_ADMIT.DESCR254
BasisAdmitDE	BASIS_ADMIT_TBL.DESCR
BasisAdmitDS	BASIS_ADMIT_TBL.DESCRSHORT
BasisAdmitAcadProg	ADM_BASIS_ADMIT.ACAD_PROG
BasisAdmitTerm	ADM_BASIS_ADMIT.ADMIT_TERM
BasisAdmitBeginDt	ADM_BASIS_ADMIT.BEGIN_DT
BasisAdmitEndDt	ADM_BASIS_ADMIT.END_DT

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Communications”

Pages Used to Record the Basis of Admission

Page Name	Object Name	Navigation	Usage
Basis of Admission Setup	BASIS_ADMIT_TABLE	Design Student Administration, Design Admissions, Setup, Basis of Admission Table, Basis of Admission	Define basis of admission codes. You link these codes to applicants and students on the Basis of Admission page.
Basis of Admission	ADM_APPL_BASIS_ADM	• Develop Enrollment, Process Applications, Use, Basis of Admission, Basis of Admission • Manage Student Records, Track Student Careers, Use, Basis of Admission, Basis of Admission	Assign the basis of admission to an applicant or student.

Defining the Basis of Admission Code

Access the Basis of Admission setup page.

Include In Offer

Select this check box to include the code, description, short description, and long description by default on the admission offer letter for any applicant to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Offer check box on the Basis of Admission page.

Include In Transcript

Select this check box to include the code and long description by default on the transcript for any student to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Transcript check box on the Basis of Admission page.

See Chapter 14, "Adding and Updating Applications," Entering Recruiting Information for an Application, page 172.

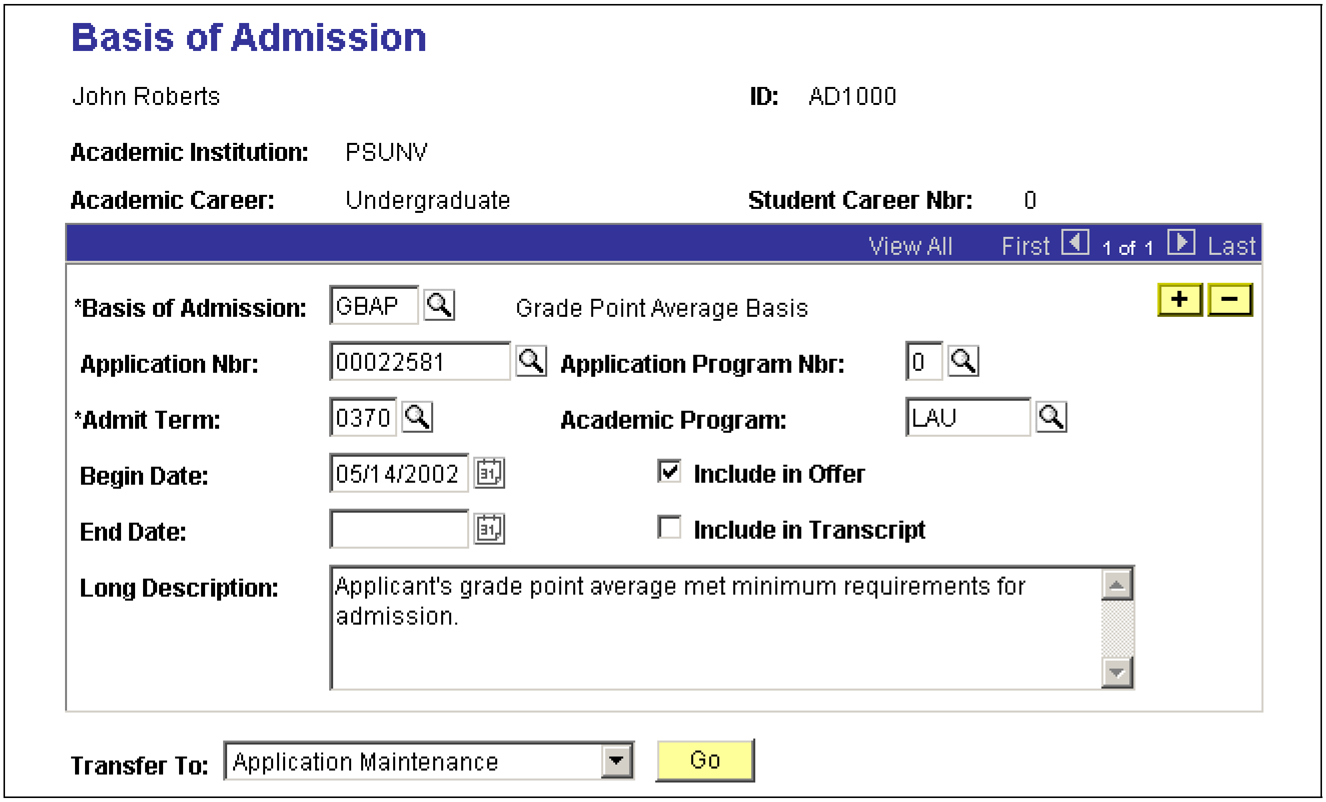
Long Description

Enter a default long description for this basis of admission code. The long description defaults to the Basis of Admission page once you assign this code to the applicant or student.

The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum score required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on their SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.

Assigning a Basis of Admission to an Individual

Access the Basis of Admission page.



Basis of Admission page

Basis of Admission — Select a basis of admission code from the list of valid values. Define basis of admission codes on the Basis of Admission page.

Application Nbr (application number) — Select an application number to assign the basis of admission to a specific application. (optional)

Application Program Nbr (application program number) — Select an application program number to assign the basis of admission to a specific program. (optional)

Admit Term — Select the individual's admit term. If an individual was admitted to more than one academic program, he or she could have multiple admit terms.

Academic Program — Select the individual's academic program to which you want to apply the basis of admission. Individuals can be admitted to multiple academic programs. (optional)

Begin Date — The default for the begin date is your system date.

End Date — Enter the date that you want this basis admission to be no longer valid. If you run the offer letter or transcript after this date it will not appear even if you have selected the Include in Offer check box.

Include in Offer — Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this applicant here.

Include In Transcript Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this person here.

Long Description The long description appears from the Basis of Admission setup page. You can change the long description for this person here.

The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on his or her SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Recording Comments and Conditions for Admission

This section discusses how to:

- Define admissions comment codes.
- Assign admission comment codes to applicants.

PeopleSoft Recruiting and Admissions functionality enables you to record generic comments and then link them to an applicant. You can use this functionality however you like. One particular use is to record conditions of admission. For example, you can define a comment such as "You must successfully complete all current coursework." You can set up admission comment codes that represent general admission comments, then link the code or codes to the applicant. You can print the comments on the admission offer letter, and later, once the applicant becomes a student, you can print the comment on his or her transcript.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

Winword Merge Field	PeopleSoft RECORD.FIELD
AdmCommentCd	ADM_COMMENTS.ADM_COMMENT_CD
AdmCommentDL	ADM_COMMENTS.DESCRLONG
AdmCommentDE	COMMENT_CDE_TBL.DESCR

Winword Merge Field	PeopleSoft RECORD.FIELD
AdmCommentDS	COMMENT_CDE_TBL.DESCRSHORT
AdmCommentTerm	ADM_COMMENTS.ADMIT_TERM
AdmCommentProg	ADM_COMMENTS.ACAD_PROG
AdmCommentBegin	ADM_COMMENTS.BEGIN_DT
AdmCommentEnd	ADM_COMMENTS.END_DT
AdmCommentType	ADM_COMMENTS.COMMENT_TYPE

See Also

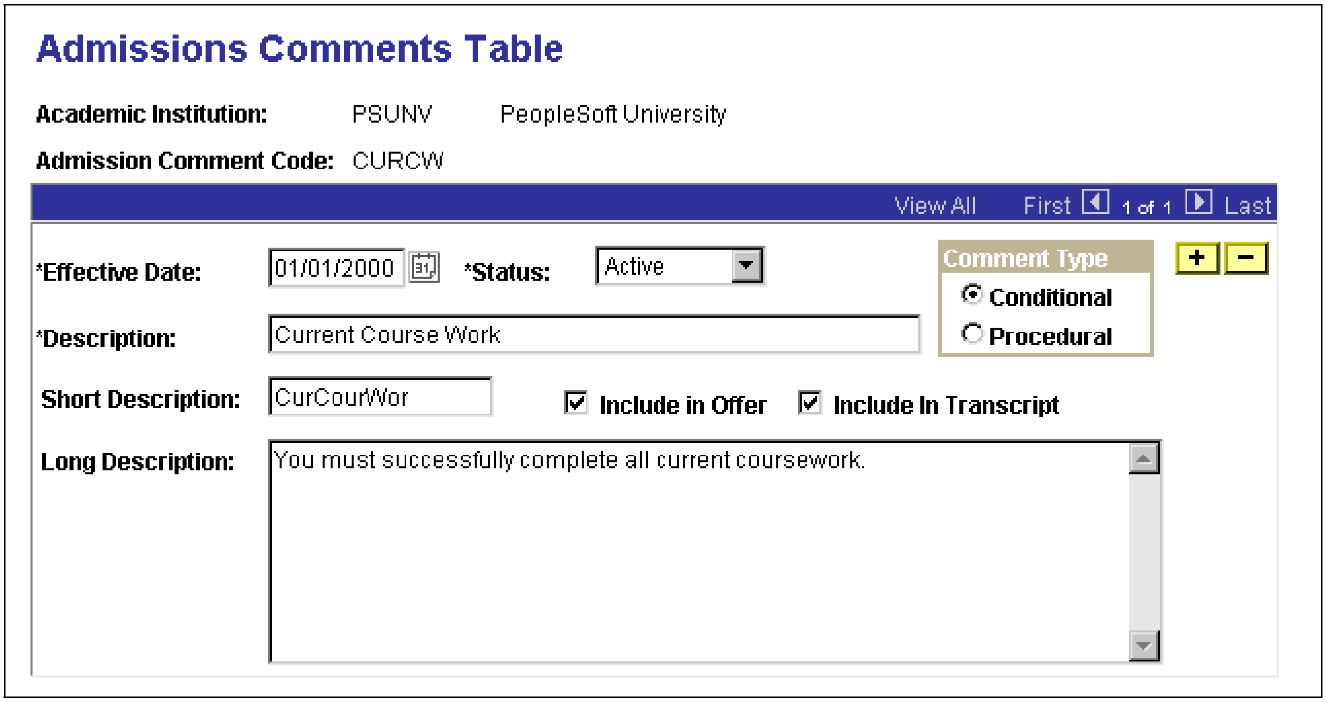
PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Communications,” Understanding Letter Generation

Pages Used to Record Comments and Conditions for Admission

Page Name	Object Name	Navigation	Usage
Admissions Comments Table	ADM_COMMENTS_TABLE	Design Student Administration, Design Admissions, Setup, Admission Comments Table, Admissions Comments Table	Define admission comment codes.
Admissions Comments	STDNT_ADM_COMMENTS	Develop Enrollment, Process Applications, Use, Admission Comments, Admission Comments	Assign admission comments to applicants.

Defining Admission Comment Codes

Access the Admissions Comments Table page.



Admissions Comments Table page

Comment Type — Indicates the type of comment that you are entering. Select *Conditional* if the comment is a condition for admission, and *Procedural* if the comment is for procedure only. (informational only)

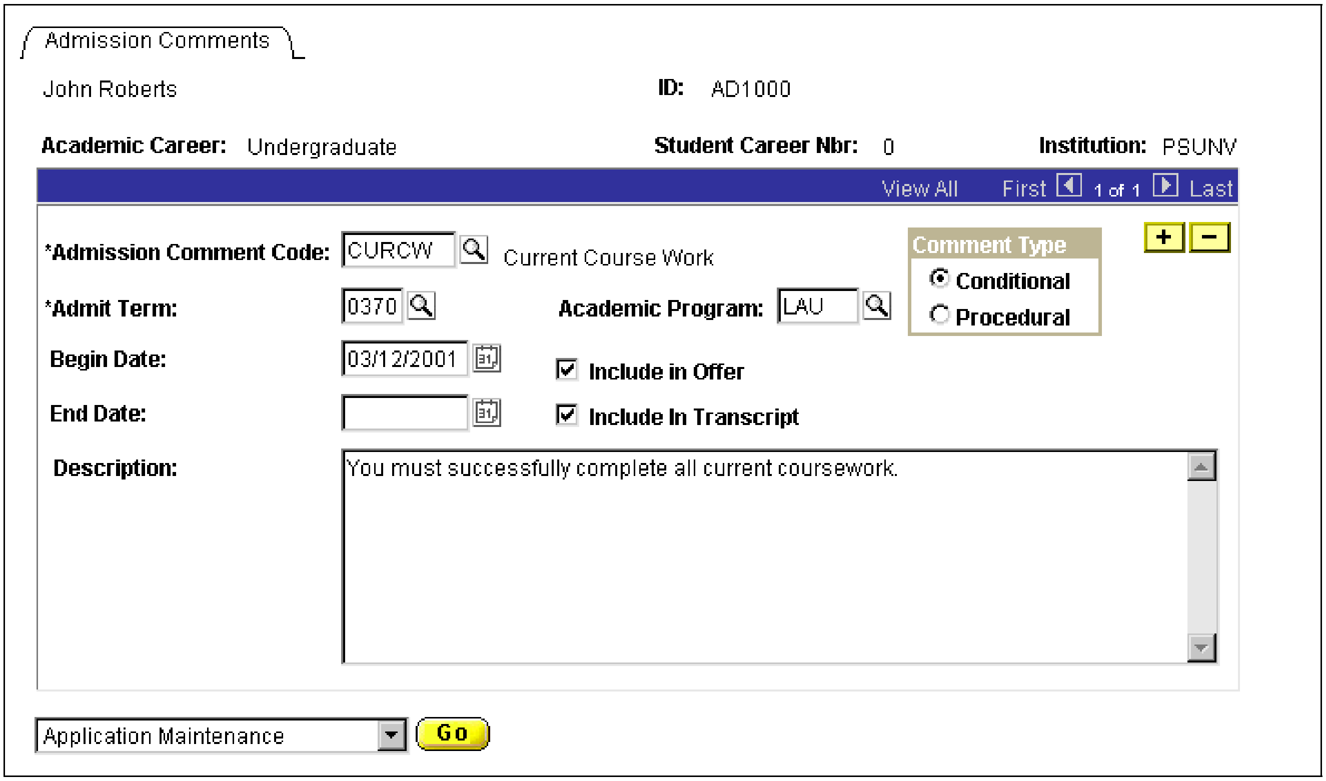
Include In Offer — Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. When you select this check box, the system automatically selects the Include in Offer check box on the Admission Comments page.

Include In Transcript — Select this check box to include the code and long description on the student's transcript. When you select this check box, the system automatically selects the Include in Transcript check box on the Admission Comments page.

Long Description — Enter the full text of the comment for this admission comment code. The long description defaults to the Admission Comment page once you assign this code to the applicant.

Assigning Admission Comments to Applicants

Access the Admission Comments page.



Admission Comments page

Admission Comment Code

Select the code from the list of valid values. Admission Define comment codes on the Admission Comment Table page.

Admit Term

Select an admit term. If an applicant was admitted to more than one academic program, he or she could have multiple admit terms.

Academic Program

Select an academic program. Applicants can be admitted to multiple academic programs. (optional)

Comment Type

Indicates the type of comment that you're entering. Select *Conditional* if the comment is a condition for admission, and *Procedural* if the comment is for procedure only. (informational only)

Begin Date

The default for the begin date is your system date.

End Date

Enter the date that you want this comment to be no longer valid. If you run the offer letter after this date it will not appear even if you have selected the Include in Offer check box.

Include in Offer

Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Admission Comment Table page is selected. You can change the setting for this applicant here.

Include In Transcript

Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Admission Comment Table page is selected. You can change the setting for this applicant here.

Long Description The long description appears from the Admission Comment Table page. You can change the long description for this applicant here.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Viewing Summary Checklist, Comment, and Communication Data

You can use summary pages for a quick view of checklists, comments and communications stored for prospects, applicants and recruiters. You can also view Operator 3C Groups pages for checklists, comments and communications.

- Use the Checklist Summary page (PERS_CHKLST_SUMM) to access a summary of checklists associated with a recruiter, a prospect, or an applicant.

  The Checklist Summary page enables you to designate which checklist information you want to see for a person.

- Use the Comment Summary page (CMNT_SUMMARY) to access a summary of comments associated with a recruiter, a prospect or an applicant.

  The Comment Summary page enables you to designate which checklist information you want to see for a person.

- Use the Communication Summary page (COMM_SUMMARY) to view a summary of communications associated with a recruiter, a prospect, or an applicant.

  This page enables you to designate which communication information you want to see for a person.

- Use the Operator 3C Groups Summary (Checklist) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Comment) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Communication) page (OPR_GRP_3C_SUM) to view the user 3C groups to which you are assigned.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Using the 3C Engine”

CHAPTER 15

Performing EDI TS130 Transcript Transactions

This chapter lists prerequisites, provides overviews, and discusses how to:

- Process the inbound EC agent.
- Load EDI data for transcript transactions.
- Review and edit the EDI TS130 staging pages.
- Set up TS130 search/match/post parameters, process, and post the EDI staging files.
- Purge the EDI TS130 staging table and messages.
- Purge all EDI messages.

Prerequisites

The EDI Manager provides the tools you need to manage electronic commerce transactions with your trading partners. To assist you in setting up the EDI Manager for recruiting and admissions application and transcript transactions, we have created some sample definitions in the EDI Manager. However, before processing EDI transactions, you might need to modify the setup to fit your particular needs. Therefore, it is important that you familiarize yourself with PeopleSoft EDI architecture and recruiting and admissions processes to understand the implications of your EDI implementation decisions. The following sections show you a demonstration of how this information *can* be set up.

When a trading partner submits an EDI transaction, it needs to address it to a specific business unit. In other words, the EDI agent needs to know in some way to which business unit to forward the transaction. Therefore, you must define entity codes that tell the EDI Manager where to forward the transaction. PeopleSoft has created sample entity codes for admissions transcript and application transactions, as well as sample internal and external partner definitions.

- The sample entity code provided for the Admissions Transcript Transaction (TS130) is ADTR—Admission Transcript Process.
- There are two sample entity codes provided for the Application for Admissions Transaction (TS189): ADAP—Admissions Applicant Processing, and ADST—Admissions Applicant Student.
- The example internal partner definition provided (for both the EDI TS130 and TS189 transactions) is Admissions − Admissions Office.
- The sample external partner definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_STX − Admissions EDI Supply Tech. As mentioned earlier, you might use another external partner as your EDI translator.

When you receive an EDI transaction from a trading partner, the first record of the transaction includes a *Transaction ID* that identifies the transaction type. The EDI agent uses the transaction ID, in conjunction with the trading partner ID, to determine which inbound map to use to process the transaction data. Similarly, when you initiate an outbound transaction, the EDI agent puts the appropriate transaction ID in the first transaction record so that the recipient knows what kind of transaction you've sent. PeopleSoft has created sample transaction definitions, partner profile definitions and conversion data profiles.

- The sample transaction definition provided for your ADM_TRNS_130 Admissions Transcript Transaction is ADM_TRNS_TS130 Inbound − Admissions Transcript Transaction.
- The sample transaction definition provided for your ADM_TRNS_189 Admissions Applicant Transaction is ADM_TRNS_TS189 Inbound − Admissions Applicant Transaction.
- The sample partner profile definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_P − Admissions EDI Transaction Profile.
- The sample conversion data profile provided is EDI_CONV − EDI TS130/TS189. Conversion Profile lists the conversion values used in your EDI load processing (for both the EDI TS130 and TS189 transactions).

Electronic commerce maps specify how the EDI Agent transfers data between PeopleSoft business documents and the staging tables in the PeopleSoft database. The EDI agent uses inbound maps to transfer data from PeopleSoft business documents to the staging tables, in preparation for processing by your PeopleSoft Recruiting and Admissions application. PeopleSoft has created sample inbound map definitions.

- The sample inbound map definition provided for the Admissions Transcript Transaction (ADM_TRNS_TS13O) is EC Map ID TS130_MAP.
- The sample inbound map definition provided for the Admissions Applicant Transaction (ADM_TRNS_TS189) is EC Map ID TS189_MAP.

When you add a trading partner, you assign to it a *map profile*, which lists the electronic commerce maps that the EDI agent can use to process transactions from the partner. PeopleSoft has created sample data mapping profile definitions.

The example data mapping profile definition provided is ADM_EDIMP − Admissions EDI Map Profiles. This definition lists the map assignments for the Admissions Transcript Transaction (ADM_TRNS_TS13O) and the Admissions Applicant Transaction (ADM_TRANS_TS189).

See Also

PeopleSoft Supported Integration Technologies: "EDI Manager," Setting Up Trading Partners

PeopleSoft Supported Integration Technologies: "EDI Manager," Defining EDI Transactions

PeopleSoft Supported Integration Technologies: "Mapping EDI Transactions," Creating Electronic Commerce Maps

PeopleSoft Supported Integration Technologies: "Mapping EDI Transactions," Creating Map Profiles

Understanding EDI TS130 Transcript Transactions

PeopleSoft Recruiting and Admissions enables you to load external academic transcripts through EDI (Electronic Data Interchange).

To perform EDI TS130 transcript transactions:

1. Process the inbound EC agent.

   Specify the location of the file that you want to load into the suspense file on the Inbound EC Agent page.

2. Load the EDI data for transcript transactions.

   Run the EDI TS130 Transcript Load/Edit process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

   Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Go into each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error)* in the Edit field on the Process Options page.

4. Once you have corrected all of the load errors in the suspense files, run the search/match/post process.

   This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include name, social security number, birth date, and so forth) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are truly duplicative.

5. Go into each suspense record that did not get posted and check to see if it is truly a duplicate.

   In the search dialog page of the TS130 Staging component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. Once you are in the component, find the parameters for which the process identified a match, then use search/match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who truly matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

6. Run the search/match/post process again.

   The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Develop Enrollment, Process External Data, Use, Bio/Demo Data. To view a test score record that the search/match/post process created or updated, select Develop Enrollment, Process External Data, Use, Test Scores.

   Purge EDI TS130 staging table records on the EDI TS130 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your EDI processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer have a need to view them.

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Purging All EDI Messages, page 239

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 107

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Understanding the EDI Applications and Transcripts Business Process

EDI is a means of transmitting data electronically from one entity to another. Through the EDI Manager you can receive data files from external sources and load important recruiting and admissions data into staging tables where you can review and edit the data. Then you can post the data to tables in your database.

PeopleSoft Recruiting and Admissions supports EDI transactions for transcripts and applications. For example, an applicant can fill out an application online using a third-party vendor, which then sends the application electronically to your institution. Additionally, an external institution can electronically send you an applicant's transcripts. In either case, you can load the data from a file into staging tables, review the data, and post it to your database.

The EDI transaction supported for the *transcript* load is the Admissions Transcript Transaction (ADM_TRNS_TS13O). The data transmitted through the EDI data load includes personal information, academic status, dates of attendance, session and course information, grades earned, degrees awarded, testing information, and more.

The inbound transaction supported for the *application* load is the Admissions Applicant Transaction (ADM_TRNS_TS189). The data transmitted through the EDI data load includes personal information, names, addresses, residence data, application entry and questions, session and course information, degrees awarded, testing information, and more.

If you receive a transcript or application for a person who does not exist in your database, the system can add the person to your system (depending on the parameters you set up). If the person already exists in your database, the system can update the person's records (depending on the parameters you set up).

The file that you load into EDI Manager is a business document that you receive from an EDI translator. The example setup provided with your system was developed using a Supply Tech business document. Your institution, however, might receive your business document from another EDI translator.

See Also

PeopleSoft Supported Integration Technologies: "EDI Manager"

Processing the Inbound EC Agent

Use the Inbound EC Agent (inbound electronic commerce agent) page to specify the location of the file that you want to load into the suspense file. The Inbound EC Agent (ECIN0001.sqr) process converts the data in the file according to your setup in the EDI Manager. Once the process converts the data, it loads it into temporary files until you run the load process.

To process the inbound EC agent for recruiting and admissions transactions:

- Select Develop Enrollment, Process External Data, Process, Inbound EC Agent.
- Select the Single File run option.
- In the Single File Path field, enter the directory path of the file that you want to load.
- In the Single File Name field, enter the name of the file that you want to load.
- Select Do Not Force in the Force Profile group box.
- Clear the check boxes in the File Options group box.

See Also

PeopleSoft Supported Integration Technologies, "EDI Manager"

Loading EDI Data for Transcript Transactions

This section discusses how to use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables.

Page Used to Load EDI Data for Transcript Transactions

Page Name	Object Name	Navigation	Usage
EDI TS130 Load Parameters	ADM_TS130_LOD_PARM	Develop Enrollment, Process External Data, Proc E-F, EDI TS130 Load, EDI TS130 Load Parms	Use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables.

Loading TS130 Transcripts into Staging Tables

Access the EDI TS130 Load Parameters page.

Warning! We recommend that you complete the full loading, search/match and posting process before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data in your staging files.

Male, Female, and **Unknown** — An EDI load does not include a person's prefix. It does, however, include gender. In these fields, enter the prefix that you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

Once you load the data into staging files, you can view the data in the EDI TS130 Staging pages if desired.

Click the Run button to run the EDI TS130 Transcript Load/Edit process at user-defined intervals.

Reviewing and Editing the EDI TS130 Staging Pages

This section discusses how to use the EDI TS130 Staging component to review or edit the transcript data that you loaded through the EDI transaction. If you have not run the posting process, any changes you make post to your database when you run the posting process, which means the data posts to the person's record (unless otherwise noted).

The EDI TS130 transcript staging pages are holding tables and are not linked to your database. Personal, organization, and transcript data from these tables post to your database during the posting process, but the data is not shared. In other words, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data, to the Education component, and to the Test Results page. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

You can access the EDI TS130 Staging pages to review the information stored here at any time during the Processing TS130 transcript business process. For example, you might prefer to look at the data immediately after loading it, after processing it, after posting it, or after each of those steps, depending on your procedures.

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

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

See Also

The Postsecondary Electronic Standards Council Website

Pages Used to Reviewing and Editing the EDI TS130 Data

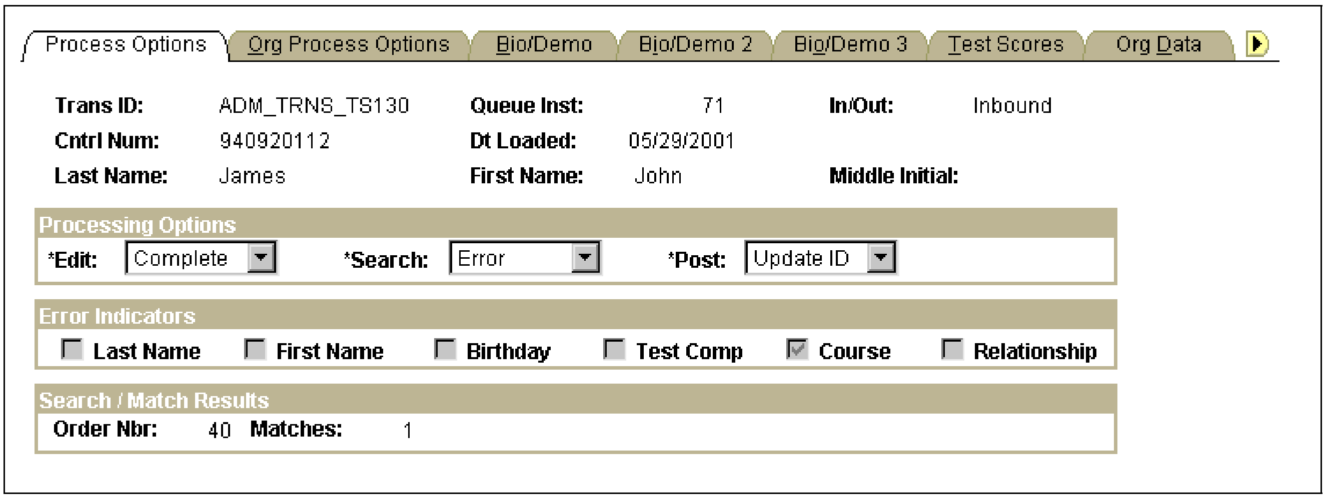
Page Name	Object Name	Navigation	Usage
Process Options	ADM_TS130_PROC_OPT	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Process Options	Review or edit the process options in your EDI TS130 staging table. This page provides the status of an EDI TS130 transcript record regarding the loading, search/match and posting processes. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.
Org Process Options (organization process options)	ADM_TS130_ORG_OPT	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Org Process Options	Review or edit the process options for external organization records in your EDI TS130 staging table.
Bio/Demo (EDI TS130 biographical/demographic)	ADM_TS130_BIODEMO1	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Bio/Demo	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.
Bio/Demo 2 (biographical/demographic 2)	ADM_TS130_BIODEMO2	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Bio/Demo 2	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.
Bio/Demo 3 (biographical/demographic 3)	ADM_TS130_BIODEMO3	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Bio/Demo 3	Review and edit the address data loaded through the EDI TS130 data load.
Test Scores	ADM_TS130_TESTS	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Test Scores	Review or edit test score data loaded through the EDI TS130 data load.
Org Data (organization data)	ADM_TS130_ORG_DEMO	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Org Data	Review and edit the organization demographic data loaded through the EDI TS130 data load. This page contains data about the external organization that this transcript data is regarding. Organization data does *not* post to your database.
Organization Address	ADM_TS130_ORG_SEC	Click the Organization Address link on the EDI TS130 Organization Data page.	View address information for an external organization.

Page Name	Object Name	Navigation	Usage
Acad Status (academic status)	ADM_TS130_SST	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Acad Status	Review or edit high school academic status data loaded through the EDI TS130 data load. If the organization you are viewing is a high school, this page contains high school academic information about the person in regard to this organization.
Entry Dates	ADM_TS130_SSE	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Entry Dates	Review entry dates loaded through the EDI TS130 data load. This page contains information regarding the dates the person on this transcript entered and left this school. The data on this page is informational only and does *not* post to your database.
Sessions	ADM_TS130_SES	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Sessions	Review or edit transcript session data loaded through the EDI TS130 data load. Multiple sessions can come from one organization. For example, one session could make up the Fall of 9th grade, whereas another session could make up the Spring of 9th grade.
Class Rank	ADM_TS130_CLS_RANK	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Class Rank	Review or edit transcript class rank data loaded through the EDI TS130 data load.
Courses	ADM_TS130_CRS	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Courses	Review or edit transcript course data loaded through the EDI TS130 data load.
Course Detail	ADM_TS130_CRS_SEC	Click the Course Detail link on the Courses page.	View additional course information.
Activities	ADM_TS130_ACTIVITY	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Activities	Review or edit transcript degree data loaded through the EDI TS130 data load. Activity information falls under a session.
Degrees	ADM_TS130_DEG	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Degrees	Review or edit transcript degree data loaded through the EDI TS130 data load. Degree information falls under a session.
RAP (requirements, attributes, and proficiencies)	ADM_TS130_RAP	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, RAP	Review or edit transcript degree data loaded through the EDI TS130 data load. Requirement, Attribute, and Proficiency information fall under a session.

Page Name	Object Name	Navigation	Usage
Academic Summary	ADM_TS130_ACAD_SUM	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Academic Summary	Review or edit academic summary data loaded through the EDI TS130 data load.
EDI TS130 Messages	ADM_TS130_MSGS	Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, Messages	View EDI TS130 processing messages.

Reviewing EDI TS130 Staging Process Options

Access the Process Options page.



EDI TS130 Staging - Process Options page

Processing Options

Edit

The system displays the status of the load process for this suspense record. The load process populates this value.

Complete: The load process loaded the transcript data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the transcript data. The system indicates the values that you need to correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. Once you correct the errors and save the component, the system changes the field value to *Complete.*

Perform: You set this value manually. It is for informational purposes only.

Search

The system displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process posted the transcript data without a problem. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the Bio/Demo page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.

Error: The search/match process encountered problems when posting the transcript data.

Perform: The search/match process processes this record the next time you run the process.

Post

The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the table below.

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	The system was unable to find a match in the database and will add a record with a new ID to your database when you run the search/match/post process. When set manually it means that the process identified a match and you determined manually that no duplication exists. When you run the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Bio/Demo page.	Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times). Set manually.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.

Post Value	Meaning	How Set
Update ID	The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record. When set manually it means that the process identified a match and you determined manually that a duplication exists. The system makes available the ID field on the Bio/Demo page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times). Set manually.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

Error Indicators

Last Name, First Name, Birth Day, Test Comp (test component), **Course,** and **Relationship**

When a load error occurs, the load external data process selects the required values that were missing or incorrect in the load. Go to the Bio/Demo page, the Tests page, or another page is the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box. Once you clear all of the check boxes and save the component, the system enters *Complete* in the Edit field.

Search/Match Results

Order Number

You know that the search/match/post process found a match and did not post the suspense record when the Search field contains *Perform* and displays the search order number that led to the match in the Order Number field. Use this information to decide for yourself whether or not a possible duplication exists.

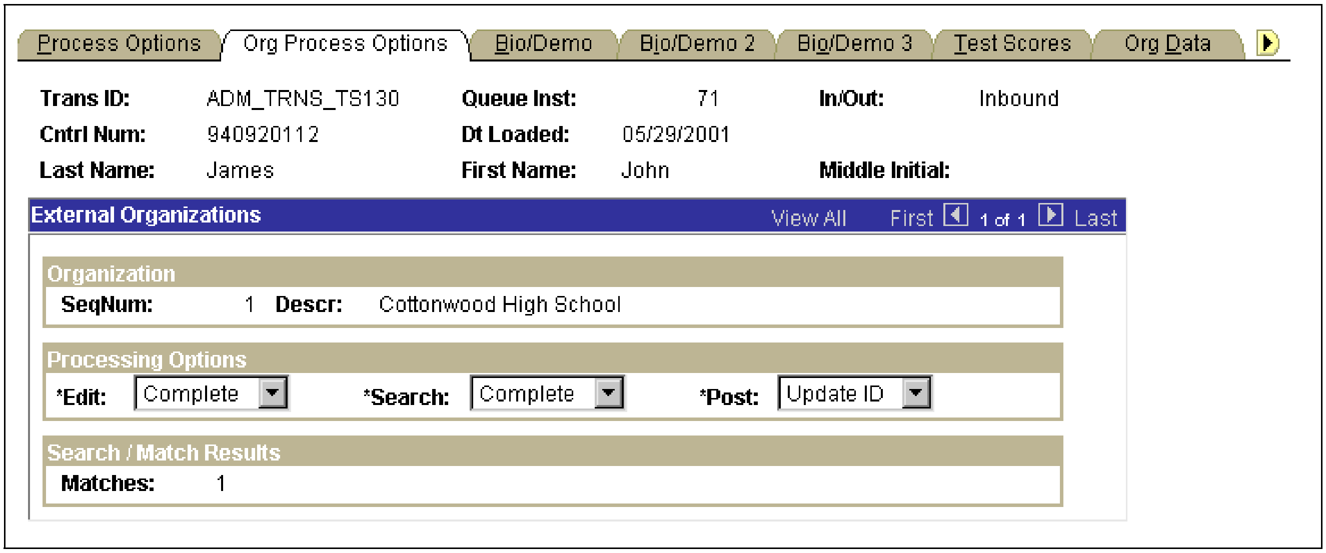
Matches

The system displays the number of matches the process found at the given order number.

Note. Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Organization Staging Process Options

Access the Org Process Options page.



EDI TS130 Staging - Org Process Options page

This page provides the status of EDI TS130 transcript organization data regarding the loading, search/match and posting processes. You can determine if an external organization record is waiting to be processed, if the person linked to this organization record instigated a new ID to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.

When organization data comes in with an EDI load, the system does not create new organizations in your database. Rather, the system searches through your database to find a *matching* external organization for the organization data that comes in. Therefore, the organization must already exist in your database for this transcript data to process. An error occurs if the process does not find a matching organization.

Organization data is linked to a personal EDI TS130 record. The organization controls the transcript information related to the person linked to this record. The system does not process the organization data until you process the matching personal record.

Processing Options

Edit

The system displays the status of the load process for this organization suspense record. The load process populates this value.

Complete: The load process loaded the organization data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the organization data. View details about the error on the EDI TS130 Messages page. Correct all errors and save the data before running the search/match/post process on this record. Once you correct the errors and save the component, the system changes the field value to *Complete.*

Perform: You set this value manually. This is for informational purposes only.

Search

The system displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process posted the organization data without a problem.

Error: The search/match process encountered problems when posting the organization data.

Perform: The search/match process processes this record the next time you run the process.

Post The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the table below.

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	The system was unable to find a match for this organization in your database. To post data for this person regarding this organization, you must manually enter a valid organization ID on the EDI TS130 Org Demo page.	Set by the system during the search/match process if no matching organization was found in your database.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	The system found a matching organization ID in the database. Consequently, data from this organization for this person can be updated.	Set by the system during the search/match process if a matching organization was found in the database.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

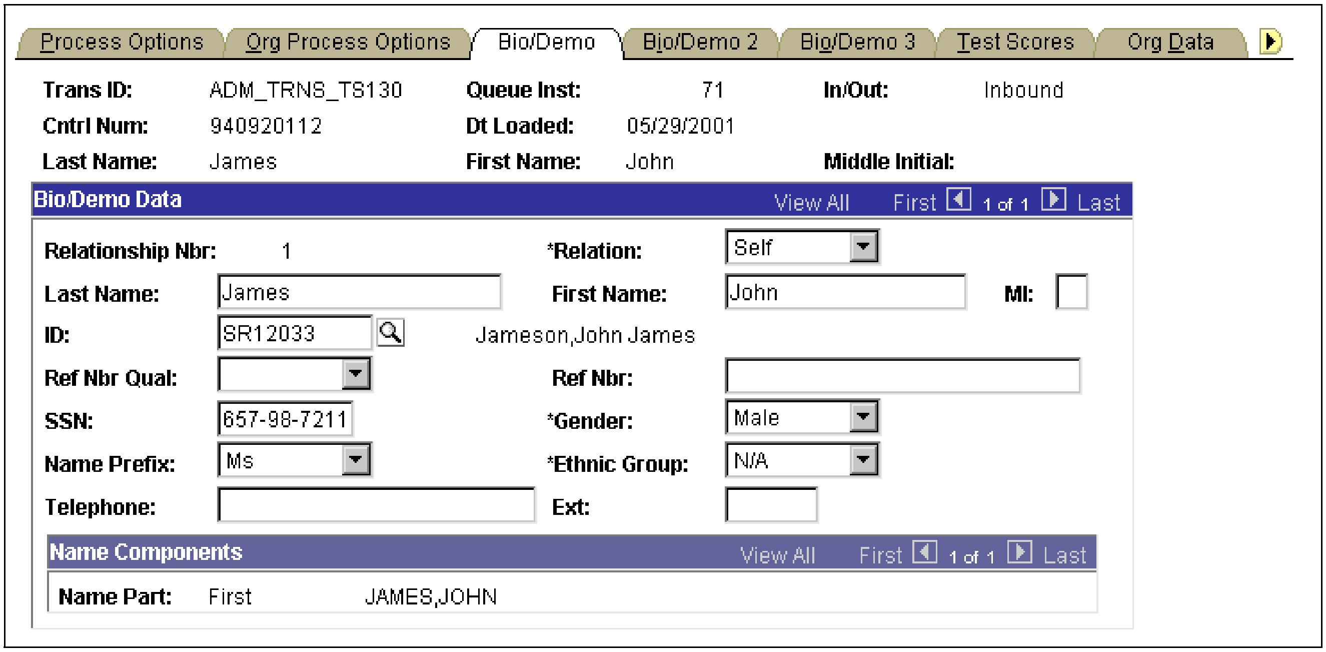
Search/Match Results

Matches The system displays number of external organization matches found in your database for this record.

Note. Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Staging Bio/Demo Data

Access the Bio/Demo (EDI TS130 biographical/demographic) page.



EDI TS130 Staging - Bio/Demo page

The Bio/Demo page contains biographical and demographic data for the person from the EDI TS130 transcript load. If provided during the load, data for persons *related* to the person on the transcript is also loaded into this page. This "relationship" data is informational only and does not post to your database. Only data regarding the person to whom this transcript belongs posts to your database.

If the system creates a new record when you post EDI TS130 data, the system uses personal information from this page to populate the new record. If the system finds a matching record in your database this EDI TS130 personal data does *not* overwrite any bio/demo data in the existing record, even if you have specified that matching records should be updated with EDI TS130 data. To protect verified information, the system never updates bio/demo data through external data loads.

If you have not run the posting process, and you edit the data on this page, the edited data posts to the person's record when you post the data.

Relationship Number The sequential numbering of the personal records related to this record. The system populates at least one row of data, which is that of the person on the transcript. Additional rows of data come in if personal information regarding persons related to this person is provided with the load.

Relation Indicates who this person is in relation to the person on the transcript. If it is the person on the transcript, *Self* appears in this field. *Self* is always the first row of bio/demo data on this page. If the row of data is for a person related to the person on the transcript, the system inserts other values (such as *Father, Sister, Spouse,* and so on). Values for this field are delivered with your system as translate values. You can modify these translate values.

Note. Only the information for *Self* posts to your database during the posting process.

ID After the load process runs, this field is display-only and is empty. After the search/match process runs this field is accessible and contains the ID of the person in your database if a match was found, or *NEW* if a new record will be added during the posting process. After the posting process runs, this field is display-only and displays the ID of the person in your database to whom this EDI data posted. This field is not accessible for rows of personal data regarding anybody except the person designated as *Self.*

This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here if the process created a new record.

If the process finds a match and updates an existing record, the process enters the ID of the record that it updated.

If the process finds a match and dumps the record into the suspense table, and you decide to update an existing ID (by selecting Update ID in the Post field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.

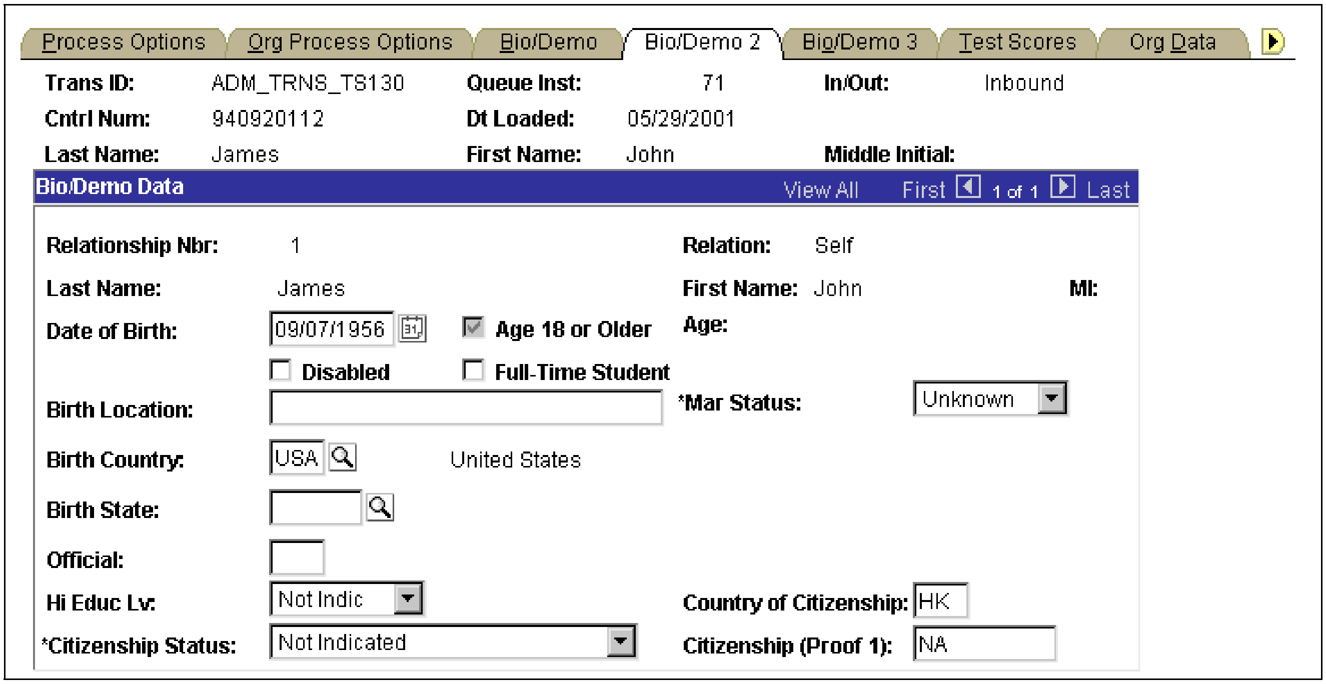
Ref Nbr Qual (reference number quality) The type of reference number indicated in the EDI TS130 load for this person.

Ref Nbr (reference number) The actual reference number from the EDI TS130 load.

Name Part The person’s name components as they come from the EDI TS130 load.

Reviewing EDI TS130 Staging Bio/Demo 2 Data

Access the Bio/Demo 2 (biographical/demographic 2) page.



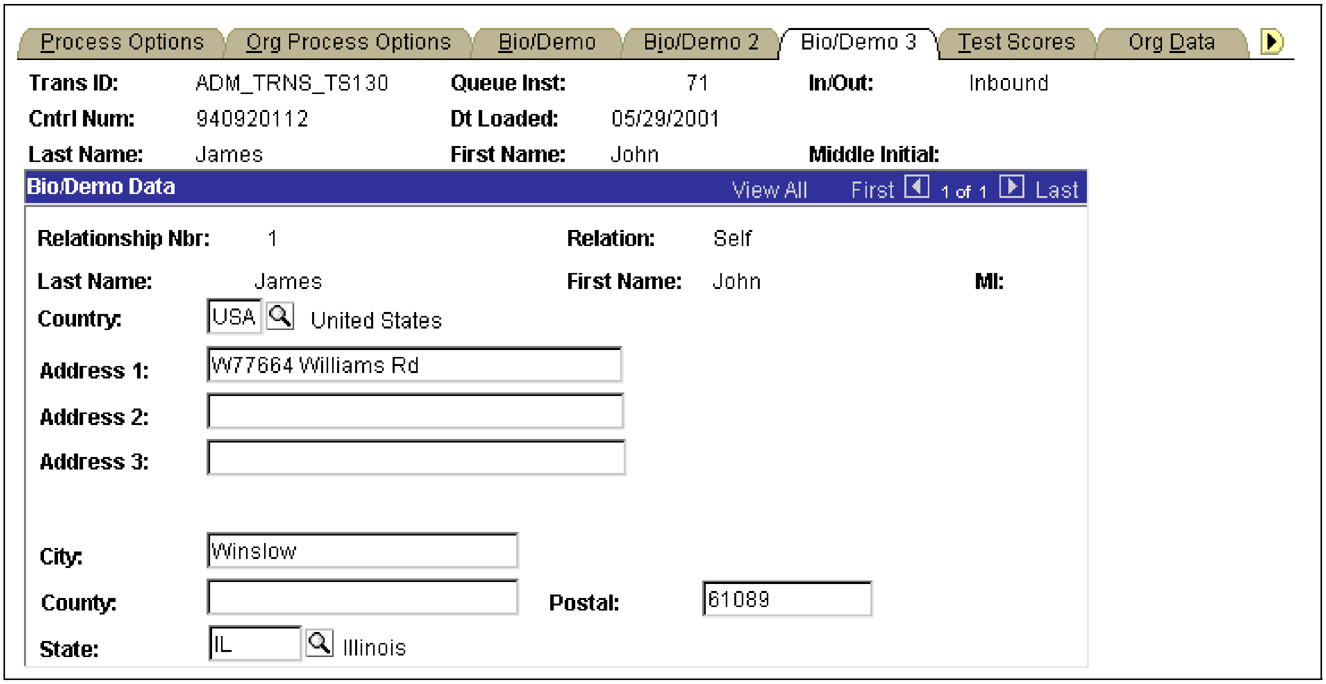
EDI TS130 Staging - Bio/Demo 2 page

If a new record is created when you post EDI TS130 data, personal information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record. If you have not run the posting process, and you edit the data on this page, the edited data posts to the person's record when you post the data.

Disabled	The system selects this check box if the record indicates that the person is disabled.
Full-Time Student	The system selects this check box if the record indicates that the person is a full-time student.
Official	The system displays the person's official language.

Reviewing EDI TS130 Staging Bio/Demo 3 Data

Access the Bio/Demo 3 (biographical/demographic 3) page.

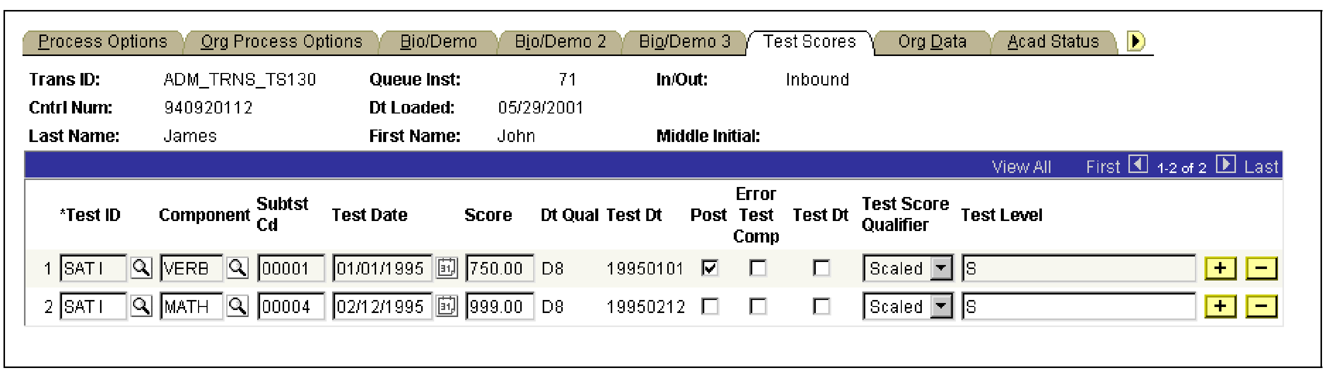


EDI TS130 Staging - Bio/Demo 3 page

If a new record is created when you post EDI TS130 data, address information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record. If you have not run the posting process, and you edit the data on this page, the edited data posts to the person's record when you post the data.

Reviewing EDI TS130 Staging Test Score Data

Access the Test Scores page.



EDI TS130 Staging - Test Scores page

Test ID The ID of the test taken by this person. Define test IDs on the Test Tables page.

Component The system translates the test component to your institution component code by matching the subtest code delivered with the EDI load and the subtest code on the Test Tables page.

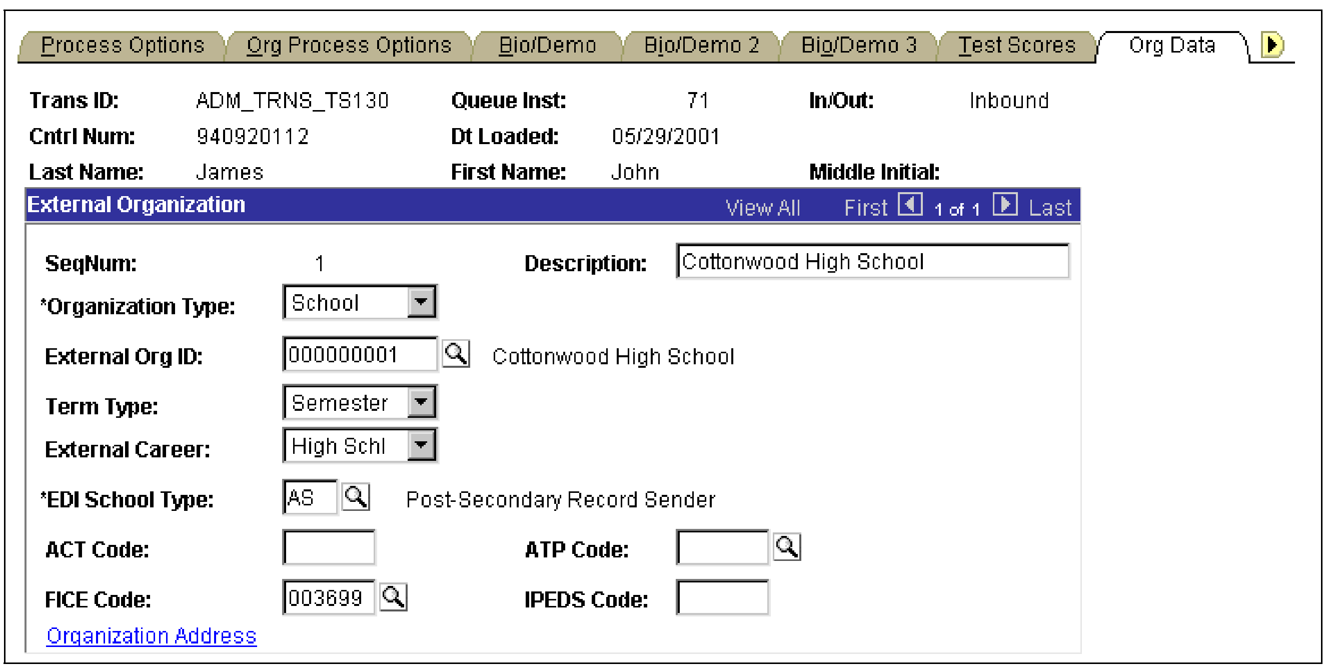
Subtst Cd (subtest code) The test component code from the EDI record.

Test Date	The PeopleSoft standard date format as translated from the EDI test date.
Score	The reported score from the EDI load.
Date Qual (date qualifier)	The date format in which the EDI test date is provided.
Test Dt (test date)	The test date appears as it is in the EDI record.
Post	The system selects this check box if the component will be posted to your database.
Error Test Comp (error test component)	The system selects this check box if it detected an error on the test component.
Test Dt (test date)	The system selects this check box if it detected an error on the test date.
Test Score Qualifier	Defines the type of test scores that the EDI process loads (such as *Pass/Fail, Normal Curve,* and *Percentile).*
Test Level	A free-form text description of the level of the test for cases in which there are multiple levels to a test. For example, for the International Baccalaureate Test, "H" represents the higher level, and "S" represents the subsidiary level.

Note. You can view the test results posted for a person through the Academic Test Summary page or the Test Results page.

Reviewing EDI TS130 Staging Organization Demographic Data

Access the Org Data (organization data) page.



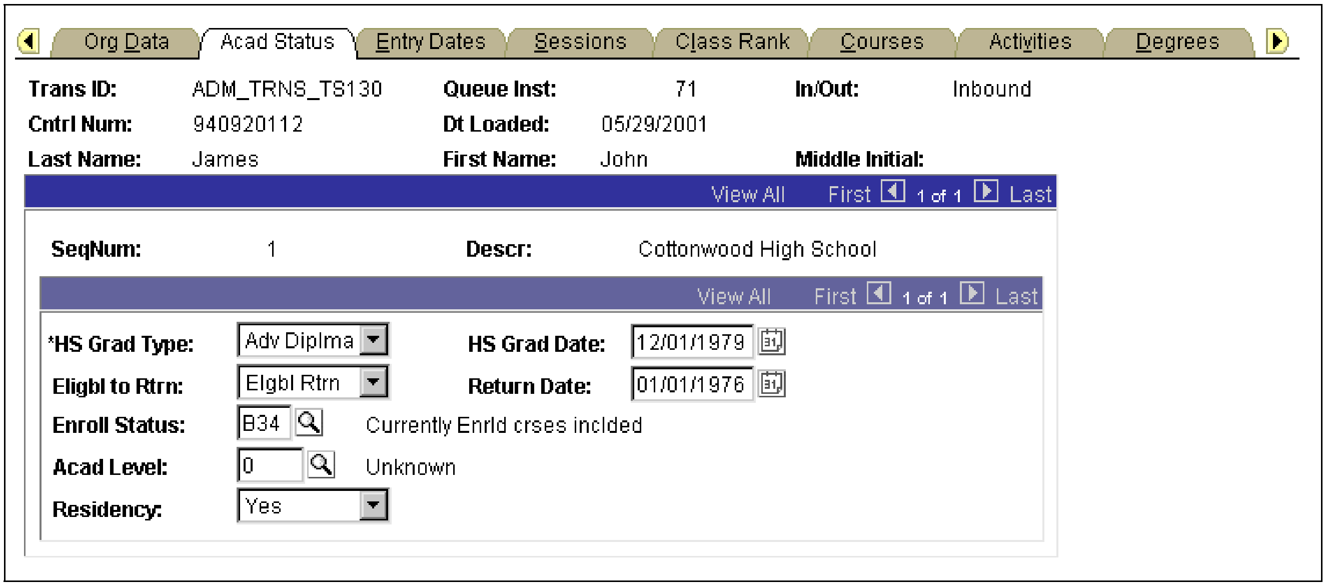
EDI TS130 Staging - Org Data page

Note. An organization must exist in your database in order for transcript data from that organization to post to your database. If the search/match process for the organization resulted in multiple or no matches, you'll need to manually choose an organization ID on this page. If the organization does not exist in your database, you'll need to add a new organization to your database and return to this page and insert the new ID.

Seq Nbr (sequence number)	The sequential number of this row of data. The first data item (or row) loaded is *1.* The next row is *2,* and so on.
Description	The descriptive name of this external organization as provided in the EDI load.
Organization Type	The type of external organization (such as *School).* Values for this field are delivered with your system as translate values. You can modify these translate values.
External Org ID (external organization ID)	If the search/match process found a match for this organization in your database, its ID appears. If more than one or no potential match is found during the search/match process, *Error* appears in the Search field of the Org Process Options page. In such a case, an organization does not appear in this page. To investigate the reason for the error, go to the EDI TS130 Staging - Messages page. If no match is found, you must manually choose the appropriate organization ID. If the organization does not exist, you'll need to add it to your database and return to this page to select the new ID. See *PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook*, "Adding Organizations to Your Database".
Term Type	The type of term used by this external organization.
External Career	The external career for this organization. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Graduate, High School, Law, Medical,* or *Undergraduate.*
EDI School Type	The EDI school type for this external organization comes from the EDI record. Its description displays next to the field.
ACT Code, ATP Code, FICE Code, and **IPEDS Code**	The ACT code, ATP code, FICE code, and IPEDS code appear.
Organization Address	Click this link to access address information for this external organization.

Reviewing EDI TS130 Staging Academic Status Data

Access the Acad Status page.

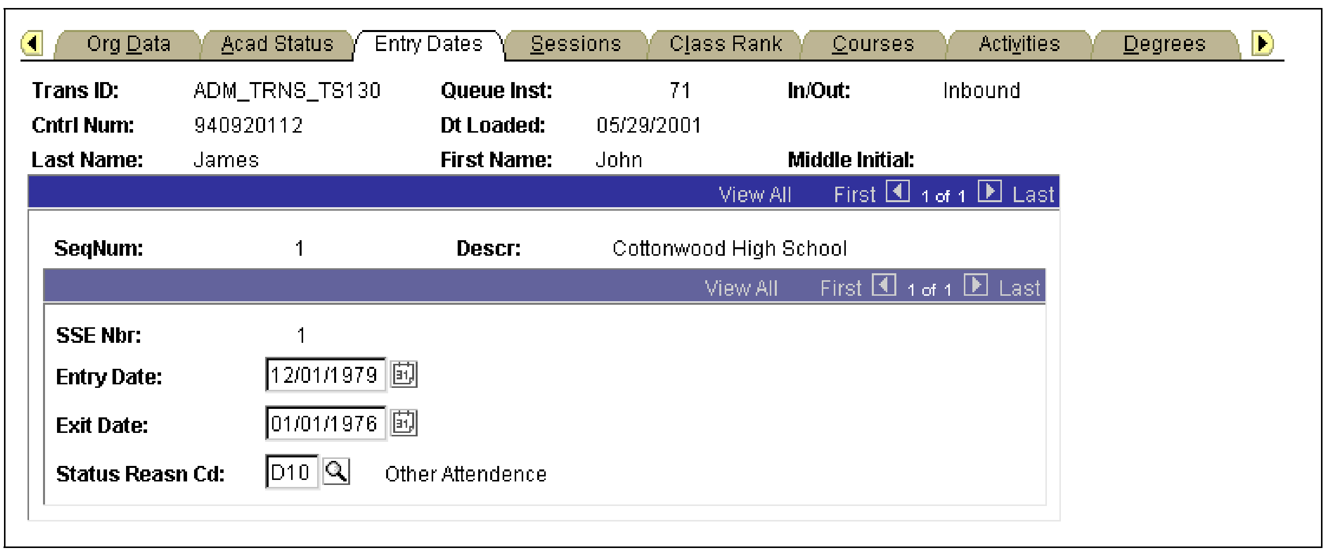


EDI TS130 Staging - Acad Status page

Once you post the EDI TS130 data, you can view transcript data for this person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Organization Entry Dates Data

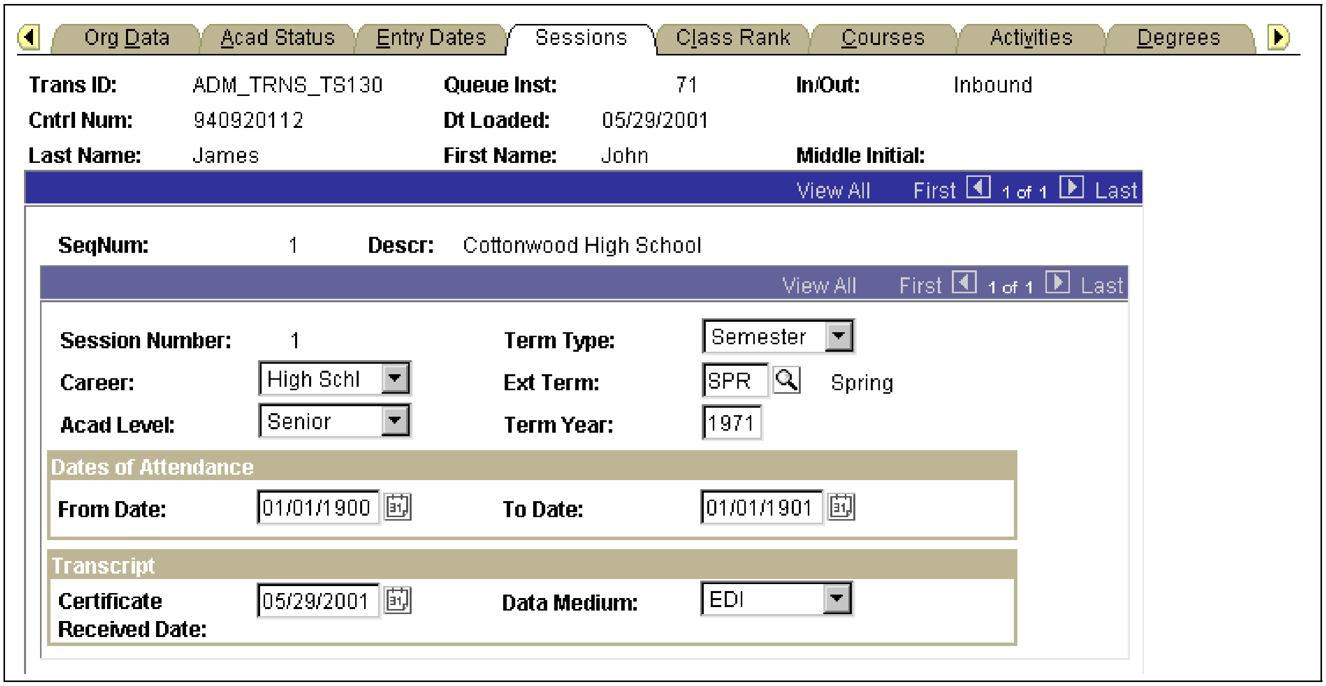
Access the Entry Dates page.



EDI TS130 Staging - Entry Dates page

Reviewing EDI TS130 Staging Session Data

Access the Sessions page.



EDI TS130 Staging - Sessions page

Term Type The term type used by this external organization. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Full Year, Miniterm, Other, Quarter, Quinmester, Semester, Trimester* and *Unknown.*

Career The external career to which this transcript session pertains. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Graduate, High School, Law, Medical,* and *Undergraduate.*

External Term The actual external term this data is regarding (such as *FALL* or *SPRING).* The values available to you in this field depend on what you have entered in the Term Type field. Define external terms on the External Term Table page.

Academic Level The academic level of the person at the time this data was collected or issued. Values for this field are delivered with your system as translate values. You can modify these translate values. Examples of the delivered values are *10th Grade, 11th Grade, Freshman, Postdoctoral,* and so on.

Term Year The term year pertinent to this session.

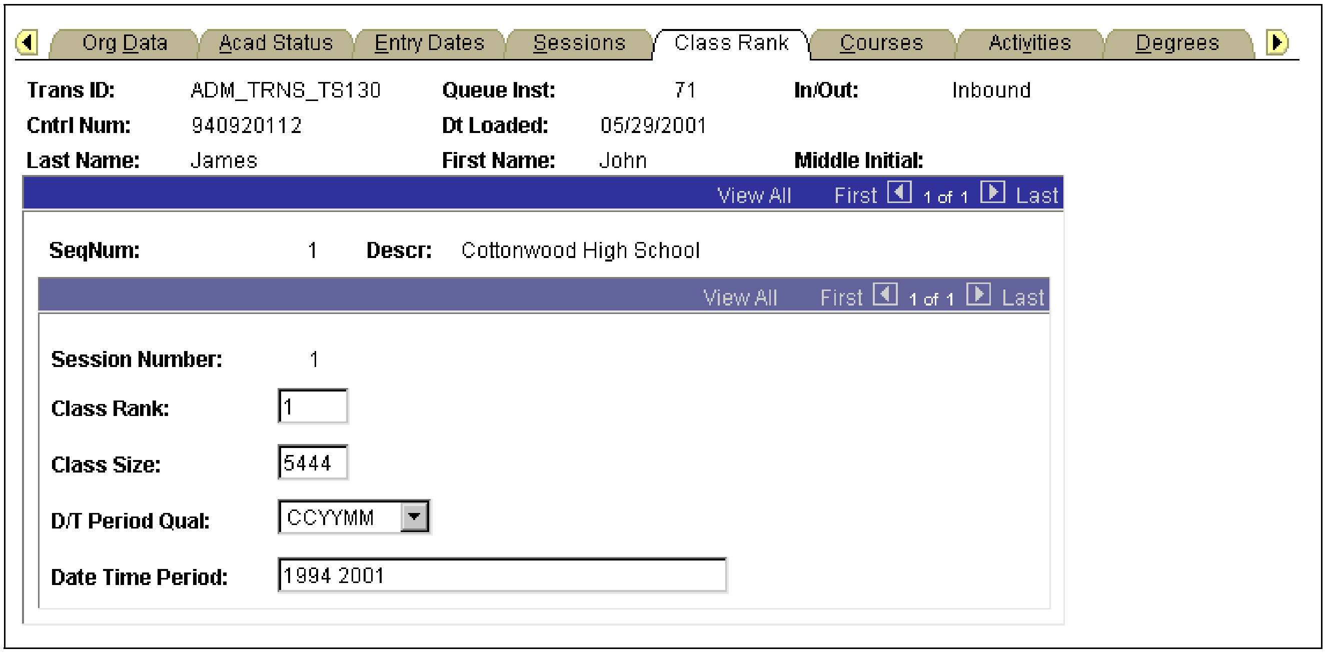
From Date and **To Date** The first and last date the applicant attended this school for this session.

Certificate Received Date The date you ran the EC Inbound Agent process.

Data Medium The data medium default for this session is *EDI.* Values for this field are delivered with your system as translate values. You can modify these translate values.

Reviewing EDI TS130 Staging Class Rank

Access the Class Rank page.



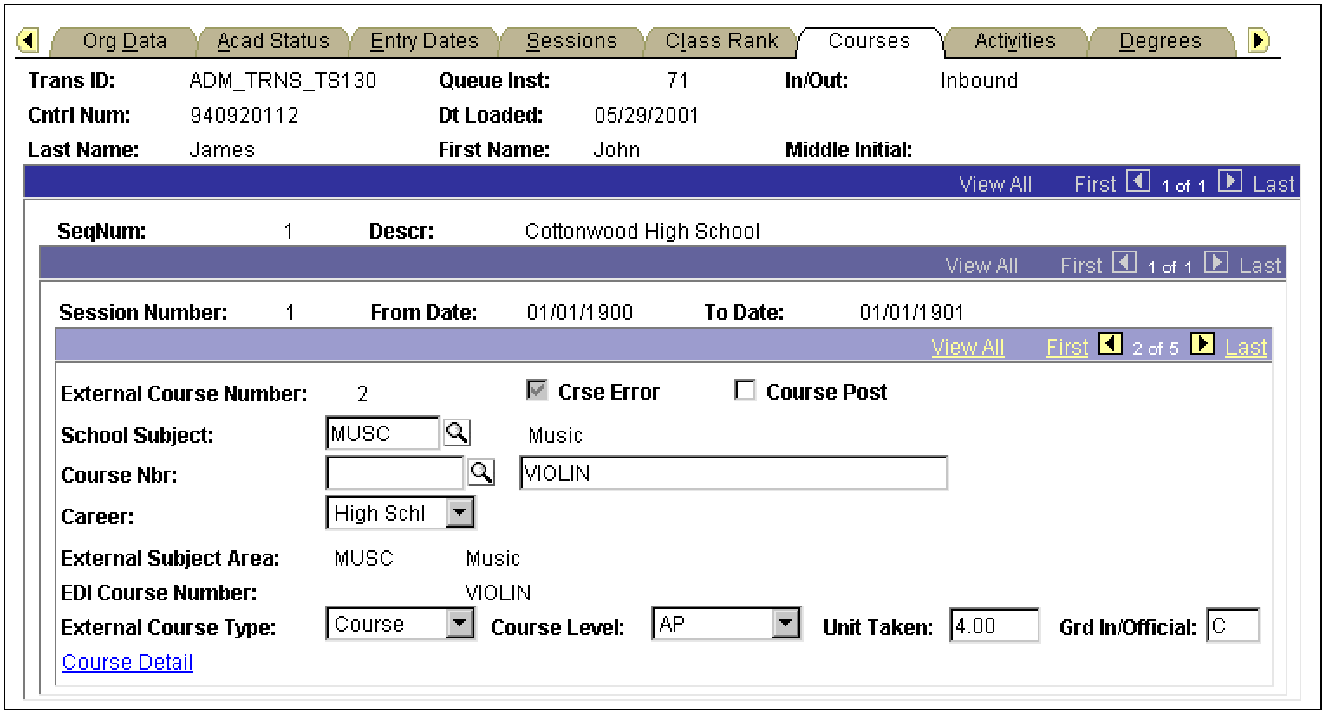
EDI TS130 Staging - Class Rank page

D/T Period Qual (date/time period qualifier)
Defines the units in which the Date Time Period field is defined. For example, if the date/time period qualifier is set at *CCYYMM,* then data represented as October 2000 would be transmitted as 200010. The date/time period qualifier comes from the EDI record. Values for this field are delivered with your system as translate values. You can modify these translate values.

Date Time Period
Represents the time period for which the class rank was calculated. The date time period comes from the EDI record.

Reviewing EDI TS130 Staging Course Data

Access the Courses page.



EDI TS130 Staging - Courses page

From Date and **To Date** — The beginning and ending date of this session.

External Course Number — The sequential number of this row of course data. The first data item (or row) loaded is *1*. The next row is *2,* and so on. Courses fall under a session.

Crse Error (course error) — The system selects the course error display-only check box if there was an error during the posting process. For example, the system selects this check box if it fails to find a matching course for the course loaded through the EDI load. See the Messages page for more information on this error.

Course Post — The system selects this check box if this course will be posted to your database.

School Subject — If the system finds an external subject area on the School Course Classification page for this school that matches the external subject area loaded through the EDI load, it populates the subject area from the School Course Classification page here. If it does not find a match, it populates the value from the External Subject Area field here, and selects the Crse Error check box. The system compares the subject areas when you post the record.

Course Nbr (course number) — If the system finds a course description and external subject area on the School Course Classification page that matches the description of the EDI course number and the external subject area from the load, it populates the course number here, and the description in the field to the right. If it does not find a match, the system leaves this field blank and selects the Crse Error check box. The system compares the course descriptions when you post the record.

Career — The external career comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

External Subject Area The external subject area loaded from the EDI load. When you post this record the system compares this value to the external subject areas and course descriptions set up for this external organization on the School Course Classification page. If it finds a match it populates the School Subject field with the corresponding subject area from the School Course Classification page. If it does not find a match the system populates the School Subject field with the value in this field. The description appears next to the field.

EDI Course Number The course number loaded from the EDI load. The description from the EDI load appears next to this course field. When you post this record the system compares the description of the EDI course number and the external subject area to the course descriptions and external subject areas set up for this external organization on the School Course Classification page. If it finds a match it populates the Course Nbr field with the corresponding course number from the School Course Classification page. If it does not find a match the system leaves the Course Nbr field blank and selects the Crse Error check box.

The Description field is display only if a match was found from your School Course Classification setup. If a match was not found, the Description field is editable.

External Course Type The external course type defining this course, such as *Course* and Event. External Course Type comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

Course Level The course level comes from the EDI load. This course could be described, for example, as an *Honors, AP,* or *Regular* course. Values for this field are delivered with your system as translate values. You can modify these translate values.

Units Taken The number of units taken for this course.

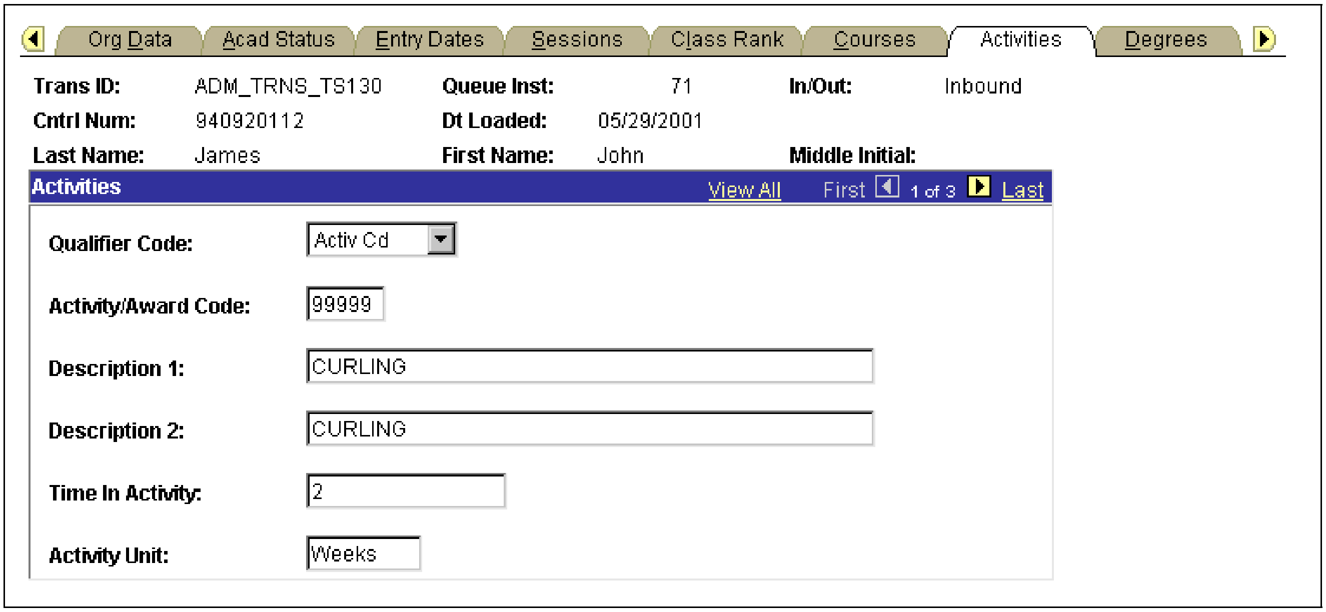
Grade In/Official The grade information for this course.

Course Detail Click this link to view additional data regarding this course.

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

Reviewing EDI TS130 Staging Activity Data

Access the Activities page.



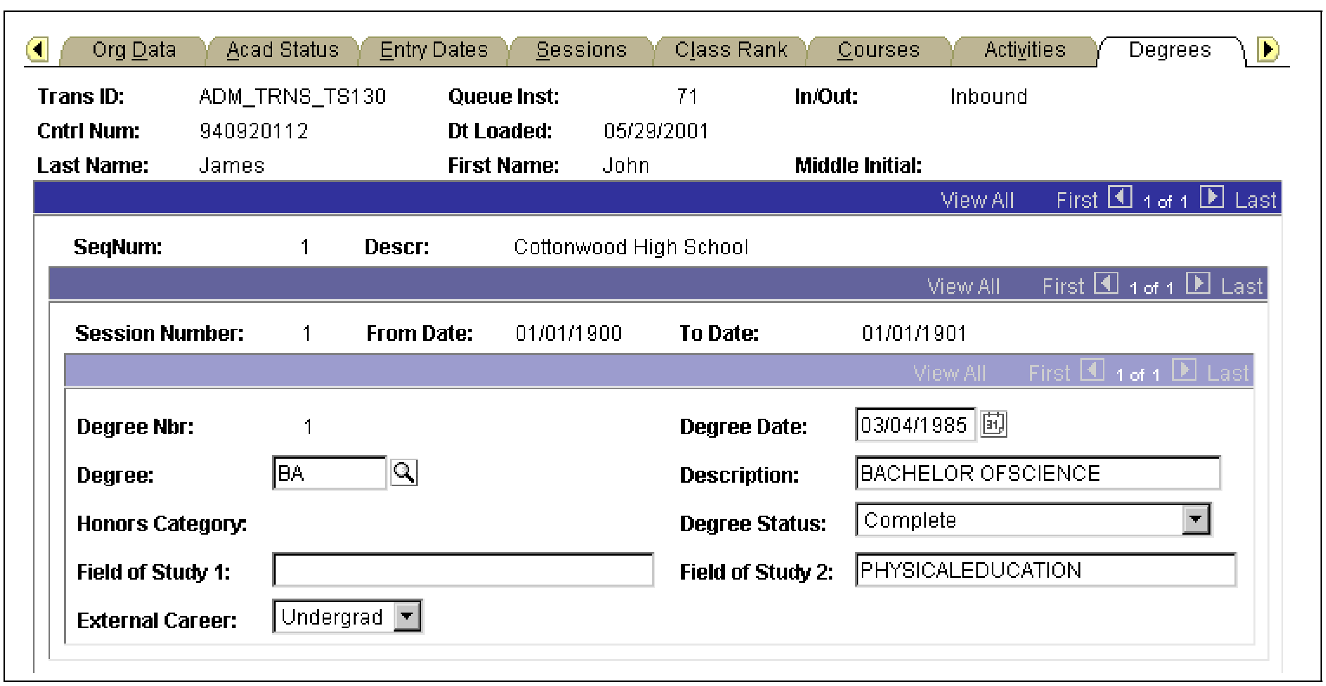
EDI TS130 Staging - Activities page

Qualifier Code Identifies a specific industry code list, such as *Activ Cd* (activity code) or *Award Cd* (award code).

Note. You can view activity code information on the Extracurricular Activities page and award code information on the Honors/Awards page once the person becomes a prospect or applicant and the data is posted to the database.

Reviewing EDI TS130 Staging Degree Data

Access the Degrees page.



EDI TS130 Staging - Degrees page

Degree Number Displays the sequential number of this row of degree data. The first data item (or row) loaded is *1*. The next row is *2,* and so on.

Degree Date The date the student received or will receive this degree.

Honors Category Honors the person received for this degree (if applicable). Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Cum Laude, Magna Cum Laude, None,* and *Summa Cum Laude.*

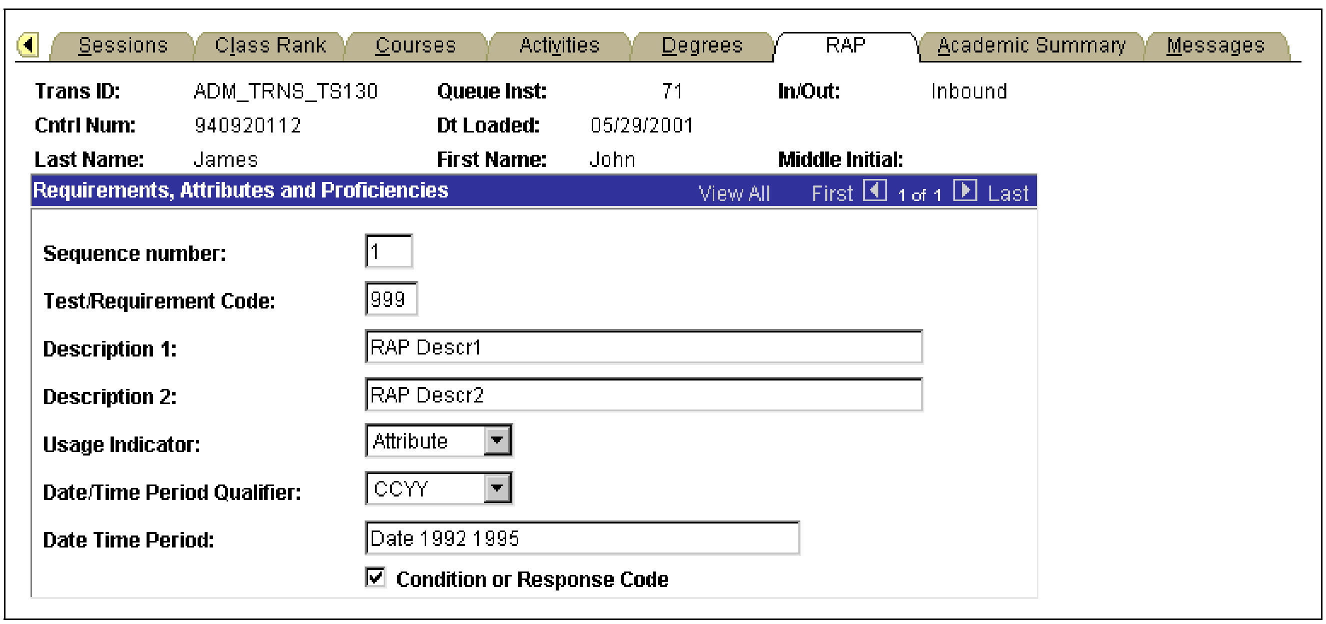
Field of Study 1 and **Field of Study 2** The particular subject areas or concentrations for this degree (if applicable).

External Career The external career of the person for this degree. Values for this field are delivered with your system as translate values. You can modify these translate values.

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

Reviewing EDI TS130 Requirements, Attributes, and Proficiencies

Access the RAP (requirements, attributes, and proficiencies) page.



EDI TS130 Staging - RAP page

Sequence Number Displays the sequential number of this row of data. The first data item (or row) loaded is *1*. The next row is *2,* and so on.

Test/Requirement Code Indicates a particular national, regional, state, or local requirement for a course.

Description 1 Specifies the *main* category of the requirement, attribute, or proficiency.

Description 2 Specifies the *lesser* category of the requirement, attribute, or proficiency.

Usage Indicator
Designates the achievement or characteristic being described as a requirement, an attribute, or a proficiency. Possible values are *Attribute, Prfncy* (proficiency), and *Reqmn* (requirement).

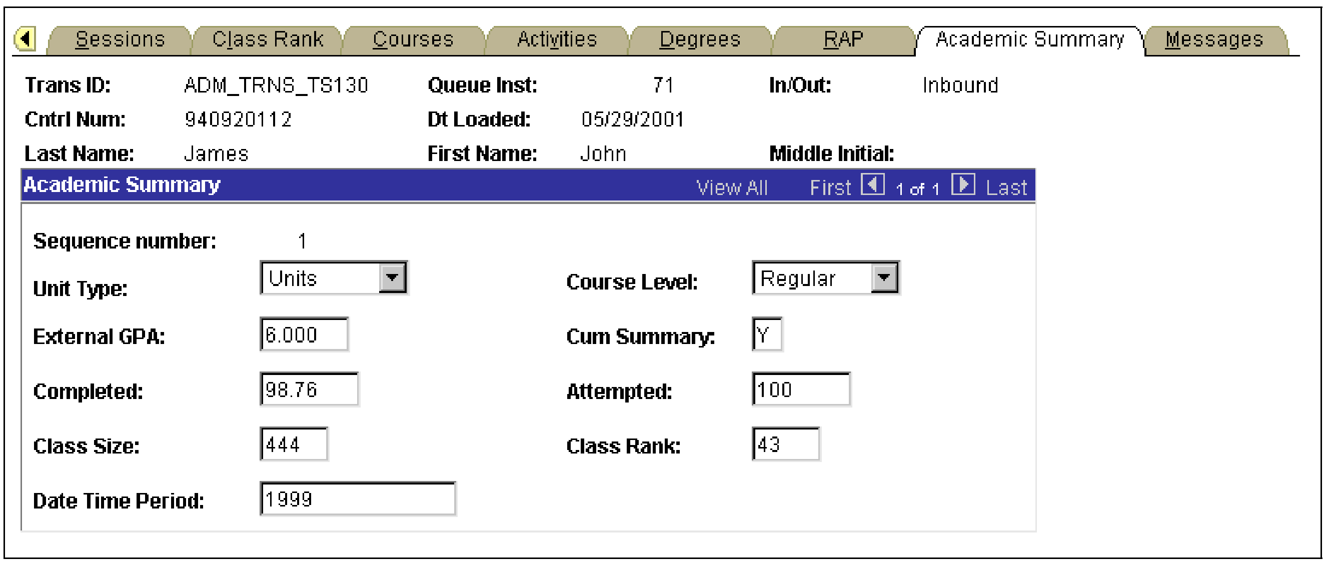
Date/Time Period Qualifier
Defines the units in which the Date Time Period field is defined. For example, if the date/time period qualifier is set at *CCYY,* then data represented as 1992 and 1995 would be transmitted as 1992 and 1995. The date and time period qualifier comes from the EDI record. Values for this field are delivered with your system as translate values. You can modify these translate values.

Date Time Period
The time period for which system calculated the requirement, attribute, or proficiency. The date time period comes from the EDI record.

Condition or Response Code
If selected, indicates that the student or course meets the requirement, attribute, or proficiency.

Reviewing EDI TS130 Staging Academic Summary Data

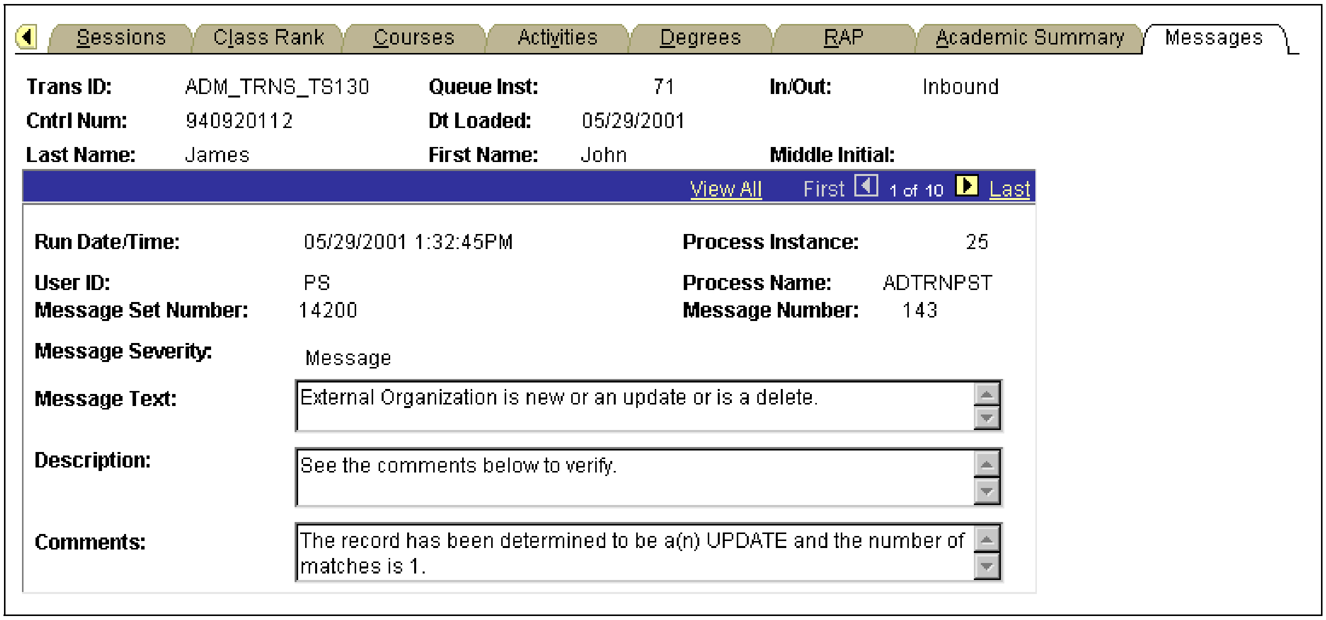
Access the Academic Summary page.



EDI TS130 Staging - Academic Summary page

Reviewing EDI TS130 Messages in the Staging Table

Access the Messages page.



EDI TS130 Staging - Messages page

Any informational and error messages that the EDI TS130 load, search/match, or posting processes generates appears on this page. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your EDI processing. To do such an analysis, you would need to wait to purge your EDI messages until you have completed your analysis.

You can also look to these messages to ascertain any changes you want to make to your staging data before posting it to your database.

Run Date/Time The day and time the last process ran for this record.

Process Instance The process number of the last process run for this record.

User ID The user ID of the person who ran the last process for this person.

Process Name The name of the last SQR run for this record. For example, in the previous page example, the last SQR run was ADTRNPST.SQR (the load process).

Message Set Number and **Message Number** The message set number and message number, which come from the message catalog.

Message Severity The message severity (such as *Message* or *Error).*

Message Text The actual message on this row of data.

Description Details about the message in the Message Text area.

Comments Results or other additional information about the message.

Setting Up TS130 Search/Match/Post Parameters, Processing, and Posting the EDI Staging Files

Once you have reviewed the staging tables, specify on the Search Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the EDI TS130 data, and then you can run both processes at once: to search for matching people in your database and to post the external EDI TS130 data according to the parameters you set up.

This section discusses how to:

- Set up search/match parameters.
- Post the EDI TS130 external data.

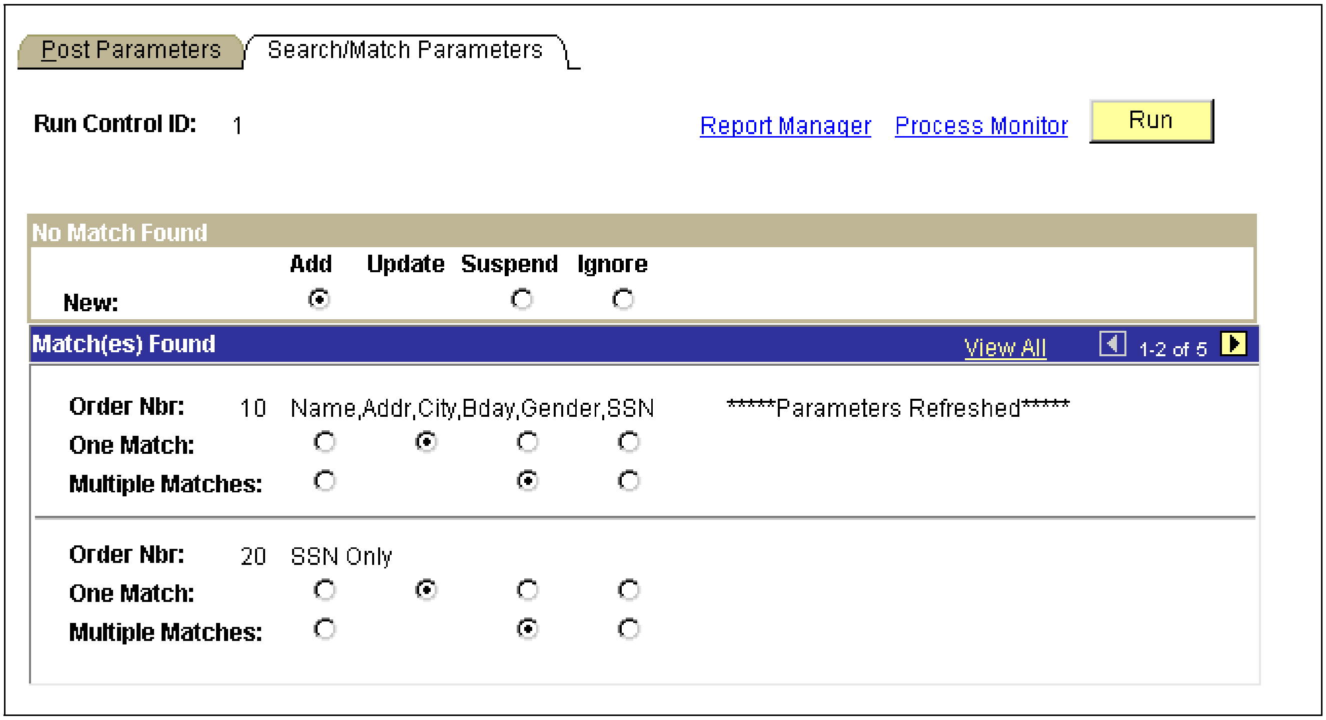
Note. The recommended option is to select the Search, Match, and Post option to search for matching people in your database and post the EDI TS130 data to the database in one step.

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

Page Name	Object Name	Navigation	Usage
Search/Match Parameters	SEARCH_PARMS	• Develop Enrollment, Process External Data, Proc E-F, EDI TS130 Search/Match/Post, Search/Match Parameters • Develop Enrollment, Process External Data, Proc E-F, EDI TS189 People Search/Post, Search/Match Parameters • Develop Enrollment, Process External Data, Proc, (Test) Search/Match/Post Scores, Search/Match Parameters	Set up your search/match parameters for processing the EDI TS130 transcript staging table.
Post Parameters	ADM_TS130_PST_PARM	Develop Enrollment, Process External Data, Proc E-F, EDI TS130 Search/Match/Post, Post Parameters	Set up post parameters and to post EDI TS130 transcript data. You can post a single record or all records in the staging table.

Setting Up Search/Match Parameters

Access the Search/Match Parameters page.



Search/Match Parameters page

Note. The words "Parameters Refreshed" appear if this is the first time you have entered this page with this run control ID, or if any of the parameters on this page changed since the last time you accessed this page with this run control ID.

No Matches Found

New Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database.

Add: Add the unmatched record to your database, including personal data.

Suspend: Keep the unmatched record in the suspense file to be looked at manually.

Ignore: Ignore the unmatched record completely. The process marks the record to be purged.

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Order Number For each order number, select what you want to do with the EDI record if the search/match/post process discovers one or more matching records.

One Match and **Multiple Matches** Select whether you want to add, update, suspend, or ignore matching records.

Add: Add a new record to your database using the suspense record.

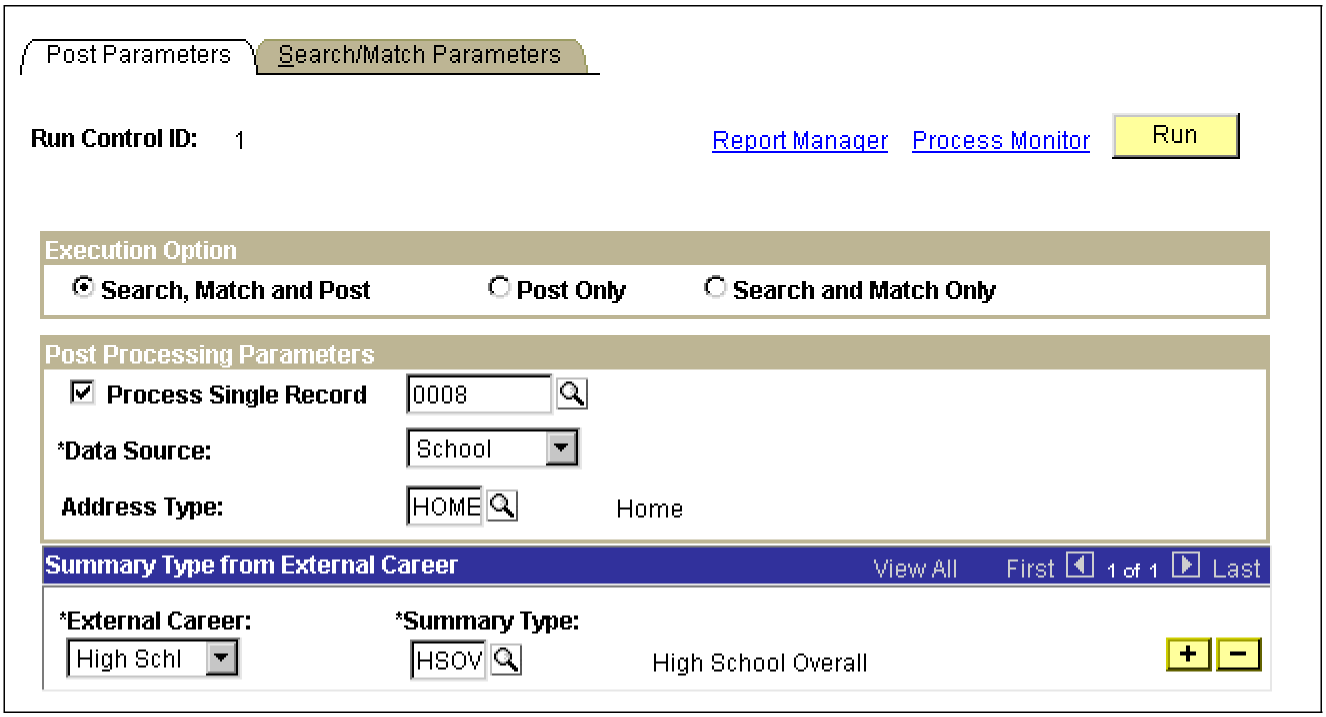
Update: Update the existing record with the data in the suspense record. Remember, the process does not update bio/demo data.

Suspend: Keep the suspense record back in the suspense table. You need to determine manually whether or not this record matches a record in your database.

Ignore: Ignore the suspense record that matched a record in your database. The process marks the record to be purged.

Posting the EDI TS130 External Data

Access the Post Parameters page.



Post Parameters page

Execution Option

Search, Match, and Post Select this option if you want to perform the search/match and the post process at the same time. This is the recommended option. The EDI TS130 Transcript Srch/Post process looks for matching data in your database. You can define search/match parameters that tell the process what to do in the case that it finds a match. Once the process has performed the match, it posts the EDI TS130 external data to your database.

Post Only Select this option if you only want to post the external data to your database.

Search and Match Only Select this option to only run the search and match process on the suspense table. Note that the process only flags the data, according to the parameters you set up, which tells the posting process to create a new person, update an existing person, or ignore the incoming data. However, the process does not create a new person or update and existing person until you post the data.

Post Processing Parameters

Process Single Record Select this option to process and post a single record. Once you select this, select the appropriate record you want to post. If you prefer to process the entire staging table, do not select this option.

Data Source Choose the data source that you want the process to assign to any transcript information that posts to your database. The default is *School.* Select a different value if desired. Values for this field are delivered with your system as translate values. You can modify these translate values.

Address Type If the posting process adds a new record to your database, the system loads the address information from the EDI record into the Address Maintenance component. Select the address type that you want to be assigned to the new address. Define address types on the Address Type Table page.

Summary Type from External Career

External Career and **Summary Type** Cross-reference fields that work in conjunction with external academic summary data from incoming transcripts. These two fields enable the posting of External GPAs to students' external education records—external GPA is tied to summary type, which is a child of external career. External career data is loaded with the TS130 table. By defining desired summary types for each external career that has been loaded, the EDI TS130 Transcript Srch/Post process writes external career, summary type, and external GPA data to the external education record.

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

Note. You can view the data in the EDI TS130 Staging pages at this time if desired. To view the transcript data posted for a person, use the Education component.

Purging the EDI TS130 Staging Table and Messages

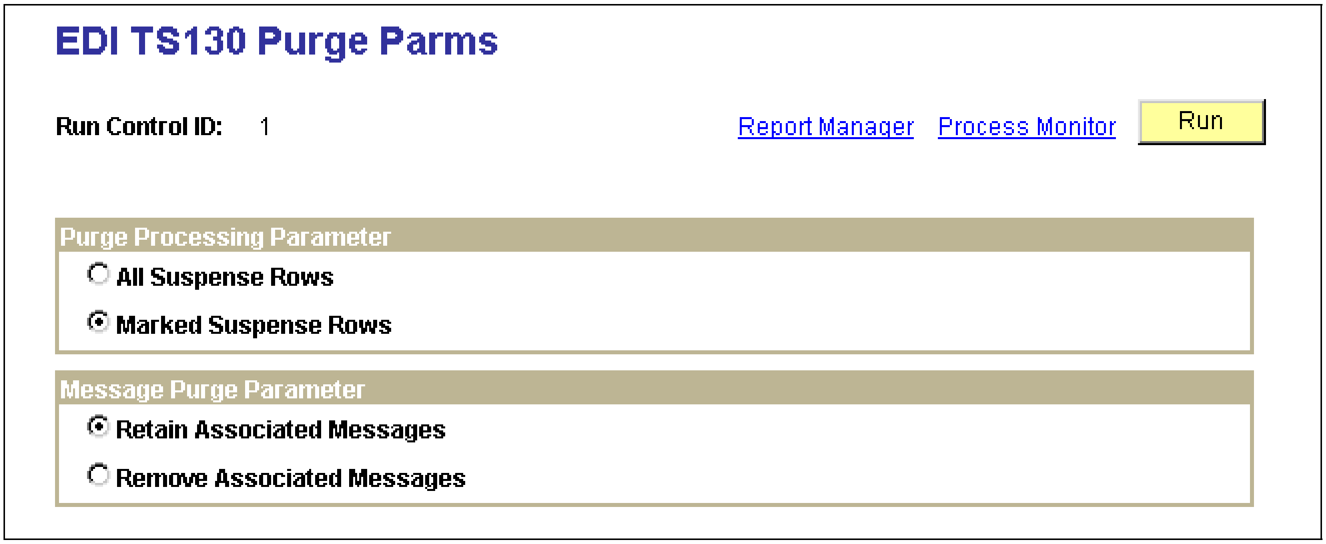
This section discusses how to purge the EDI TS130 staging table and messages.

Page Used to Purge the EDI TS130 Staging Table and Messages

Page Name	Object Name	Navigation	Usage
EDI TS130 Purge Parms (EDI TS130 purge parameters)	ADM_TS130_PUR_PARM	Develop Enrollment, Process External Data, Proc E-F, EDI TS130 Purge, EDI TS130 Purge Parms	Purge records and messages, if applicable, from the EDI TS130 staging table.

Purging Staging Tables

Access the EDI TS130 Purge Parms page.



EDI TS130 Purge Parms page

Purge Processing Parameter

All Suspense Rows Select this option if you want to purge all records in your staging table, regardless of the posting status, as shown in the Post field in the Process Options and Org Process Options pages.

Marked Test Suspense Rows Select this option if you only want to purge those records in your staging table marked *Purge* in the Post field on the Process Options and Org Process Options pages.

Message Purge Parameters

Retain Associated Messages Select this option if you *do not* want to purge messages associated with the files that you are purging.

Remove Associated Messages Select this option if you *do* want to purge messages associated with the files that you are purging.

Click the Run button to run the EDI TS130 Transcript Purge process at user-defined intervals.

Purging All EDI Messages

This section discusses how to purge all EDI messages.

Page Used to Purge All EDI Messages

Page Name	Object Name	Navigation	Usage
EDI Message Purge	EDI_TS_MSG_PURGE	Develop Enrollment, Process External Data, Proc E-F, EDI All Message Purge, EDI Message Purge	Purge all EDI messages. You can run a process to purge all EDI messages lingering in your staging files.

CHAPTER 16

Performing EDI TS189 Application Transactions

This chapter provides an overview and discusses how to:

- Load the EDI data for application transactions.
- Review and edit the EDI TS189 staging pages.
- Search for matching organization data.
- Set up TS189 search/match/post parameters, process, and post the EDI staging files.
- Purge the EDI TS189 staging table and messages.

Understanding EDI TS189 Application Transactions

PeopleSoft Recruiting and Admissions enables you to load applications through EDI (Electronic Data Interchange). This section discusses how to perform EDI TS189 application transactions.

To perform EDI TS189 application transactions:

1. Process the inbound EC agent.

   Specify the location of the file that you want to load into the suspense file on the Inbound EC Agent page.

   See Chapter 15, "Performing EDI TS130 Transcript Transactions," Processing the Inbound EC Agent, page 211.

2. Load the EDI data for transcript transactions.

   Run the EDI TS189 Transcript Load/Edit process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

   Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Go into each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error)* in the Edit field on the Process Options page.

4. Search for matching organization data.

   Once you have loaded the transcript (TS189) data into the staging files, you perform an organization search step. You must do the organization search as the TS189 load contains some organization data—course information associated with a particular organization—that must be identified to some record in the system.

5. Once you have corrected all of the load errors in the suspense files, run the search/match/post process.

This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include name, social security number, birth date, and so forth) that matches the data that you're posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are truly duplicative.

6. Go into each suspense record that did not get posted and check to see if it is truly a duplicate.

   In the search dialog page of the TS189 Staging component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. Once you are in the component, find the parameters for which the process identified a match, then use search match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who truly matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

7. Run the search/match/post process again.

   The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Develop Enrollment, Process External Data, Use, Bio/Demo Data. To view a test score record that the search/match/post process created or updated, select Develop Enrollment, Process External Data, Use, Test Scores.

8. Purge files.

   Purge EDI TS189 staging table records on the EDI TS189 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your EDI processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer have a need to view them.

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Purging All EDI Messages, page 239

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 107

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Loading the EDI Data for Application Transactions

This section discusses how to use the EDI TS189 Load Parms (EDI TS189 load parameters) page to set up application load parameters and to load application data into staging tables.

Page Used to Load the EDI Data for Application Transactions

Page Name	Object Name	Navigation	Usage
EDI TS189 Load Parms (EDI TS189 load parameters)	ADM_TS189_LOD_PARM	Develop Enrollment, Process External Data, Proc E-F, EDI TS189 Load, EDI TS189 Load Parms	Set up application load parameters and to load application data into staging tables. Once you have processed your Inbound EC Agent, define parameters on the EDI TS189 Load Parameters page for the data you are loading. After you've done that, you'll run a process to load the data into staging files.

Loading Applications

Access the EDI TS189 Load Parms page.

Warning! We recommend that you complete the full loading, search/match and posting process before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data in your staging files.

Male, Female, and **Unknown**

An EDI load does not include a person's prefix. It does, however, include gender. In these fields, enter the prefix you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

Click the Run button to run the EDI TS189 Application Load/EDI process at user-defined intervals.

Note. You can view the data in the EDI TS189 Staging pages at this time if desired.

Reviewing and Editing the EDI TS189 Staging Pages

This section discusses how to use the EDI TS189 Staging component to review or edit the application data loaded through the EDI transaction. If you have not run the posting process, any changes you make posts to your database when you run the posting process, which means the data posts to the person's record (unless otherwise noted).

The EDI TS189 application staging pages are holding tables and are not linked to your database. Personal, organization, and application data from these tables post to your database during the posting process, but the data is not shared. In other words, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data and the Application Maintenance, Extracurricular Activities, Honors and Awards, Education, Work Experience, and Test Results components. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

At any time during the TS189 application EDI load process you can access the EDI TS189 Staging pages to review the information stored here. For example, you might want to look at the data immediately after loading it, after processing it, after posting it, or after each of those steps, depending on your procedures.

If you have not run the posting process, then you can edit the data in these pages before it posts to your database. That way the edited data posts to the person's record.

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

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

Note. Many of the TS189 Staging pages are similar to those with the same name in the TS130 Staging component. For these common pages, we provide an example of the TS189 page here but refer you to the corresponding TS130 page section for a description of the fields, since they are the same.

Many of the pages in this component are identical to corresponding EDI TS130 pages

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Reviewing and Editing the EDI TS130 Staging Pages, page 212

The Postsecondary Electronic Standards Council Website

Pages Used to Review and Edit EDI TS189 Staging Pages

Page Name	Object Name	Navigation	Usage
Process Options	ADM_TS189_PROC_OPT	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Process Options	Review or edit the process options in your EDI TS189 staging table. This page provides the status of an EDI TS189 application record regarding the loading, search/match and posting processes. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.
Org Process Options (organization process options)	ADM_TS189_ORG_OPT	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Org Process Options	Review or edit the process options for external organization records in your EDI TS189 staging table.

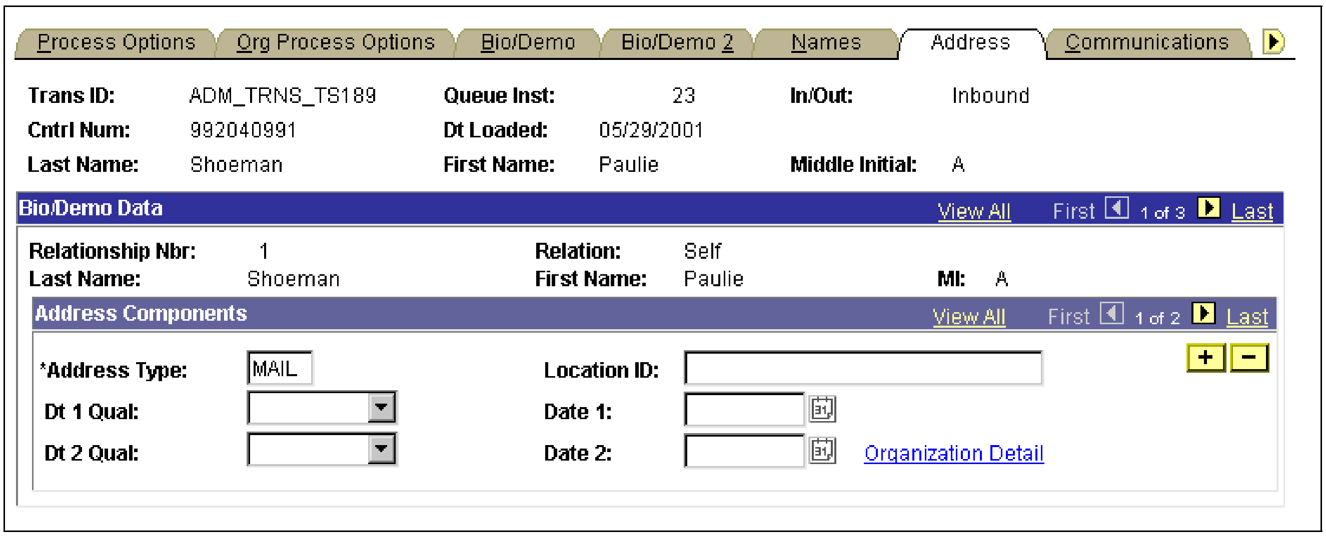
Page Name	Object Name	Navigation	Usage
Bio/Demo (biographic/demographic)	ADM_TS189_BIODEMO1	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Bio/Demo	Review and edit the biographical and demographic data loaded through the EDI TS189 data load.
Bio/Demo 2 (biographic/demographic 2)	ADM_TS189_BIODEMO2	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Bio/Demo 2	Review and edit the biographical and demographic data loaded through the EDI TS189 data load.
Names	ADM_TS189_NAM	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Names	View name component information for the application loaded through the EDI TS189 data load.
Addresses	ADM_TS189_ADR	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Address	View additional address information loaded through the EDI TS189 data load.
Organization Detail	ADM_TS189_ADR_SEC	Click the Organization Detail link on the Addresses page.	View actual address information.
Communications	ADM_TS189_COM	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Communications	View details on EDI TS189 communication data loaded through the EDI TS189 data load.
Languages	ADM_TS189_LANG	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Languages	View information concerning an applicant's language use and proficiency loaded through the EDI TS189 data load.
Recommenders	ADM_TS189_REC	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Recommenders	View information concerning individuals who recommended the applicant.
Address	ADM_TS189_REC_SEC	Click the Address link on the Recommenders page.	View address information for a recommender.
Residences	ADM_TS189_RES	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Residences	View residence data concerning the applicant and other related people.
Test Scores	ADM_TS189_TESTS	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Test Scores	Review or edit test score data loaded through the EDI TS189 data load.
Ref Nmbrs (reference numbers)	ADM_TS189_REF	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Ref Nmbrs	View reference number information loaded through the EDI TS189 data load.
App Degree (application degree)	ADM_TS189_DEG	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, App Degree	Review or edit applicant degree data loaded through the EDI TS189 data load. Degree information falls under a session.
Application Data	ADM_T189_DEG_EC	Click the Application Data link on the Application Degree page.	View details about an applicant's academic background.

Page Name	Object Name	Navigation	Usage
App Entry/Qstns (application entry/questions)	ADM_TS189_SSE	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, App Entry/Qstns	View information on additional applications questions and answers, if provided.
Org Data (organization data)	ADM_TS189_ORG_DEMO	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Org Data	Review and edit the organization demographic data loaded through the EDI TS189 data load. Organization data does *not* post to your database. The organization data from the EDI load is matched up with an organization in your database. The matching ID is then inserted on this page and carried over to the subsequent pages in this component which contain application data regarding this organization. The system also uses the matching organization to populate organization information in the Education component
Sessions	ADM_TS189_SES	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Sessions	Review or edit transcript session data loaded through the EDI TS189 data load.
Acad Status (academic status)	ACAD_TS189_SST	Develop Enrollment, Process External Data, Use, EDI TS189 Staging, EDI TS189 Acad Status	Review or edit high school academic status data loaded through the EDI TS189 data load.
Cum GPA (cumulative grade point average)	ADM_TS189_SST2	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Cum GPA	Review or edit applicant cumulative GPA data loaded through the EDI TS189 data load. GPA information is under a session.
Courses	ADM_TS189_CRS	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Courses	Review or edit applicant course data loaded through the EDI TS189 data load. Course information is under a session.
Employment	ADM_TS189_EMPLOY	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Employment	Review or edit applicant employment data loaded through the EDI TS189 data load. Employment information is under a session
Immunizations	ADM_TS189_IMMUNIZ	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Immunizations	Review or edit applicant immunizations data loaded through the EDI TS189 data load.

Page Name	Object Name	Navigation	Usage
Religion	ADM_TS189_RELIGION	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Religion	Review or edit applicant religion data loaded through the EDI TS189 data load.
Activities	ADM_TS189_ACTIVITY	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Activities	Review or edit applicant activities data loaded through the EDI TS189 data load.
Messages	ADM_TS189_MSGS	Develop Enrollment, Process External Data, Use A-F, EDI TS189 Staging, Messages	View EDI TS189 processing messages.

Reviewing EDI TS189 Staging Address Data

Access the Addresses page.



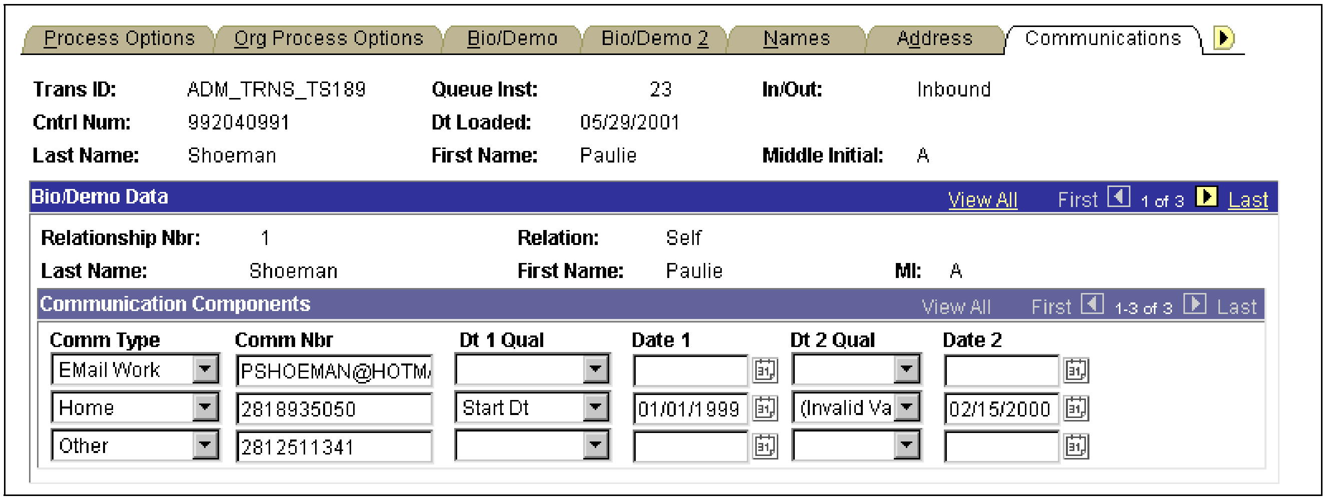
EDI TS189 Staging - Addresses page

DT 1 Qual (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier)
: Identifies what the date in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, the expiration date, and so on.

Organization Detail
: Click this link to view or edit address information. The Address Detail page appears.

Reviewing EDI TS189 Staging Communication Data

Access the Communications page.

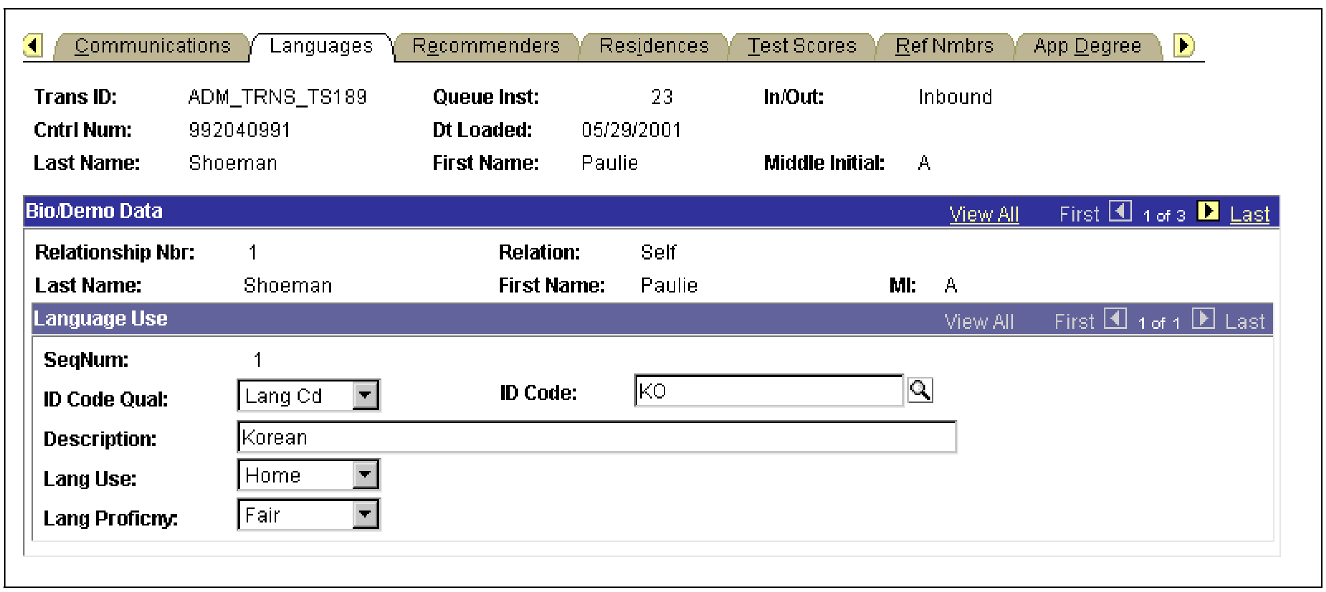


EDI TS189 Staging - Communications page

DT 1 Qual (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier)
: Identifies what the date in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, the expiration date, and so on.

Reviewing EDI TS189 Staging Languages

Access the Languages page.



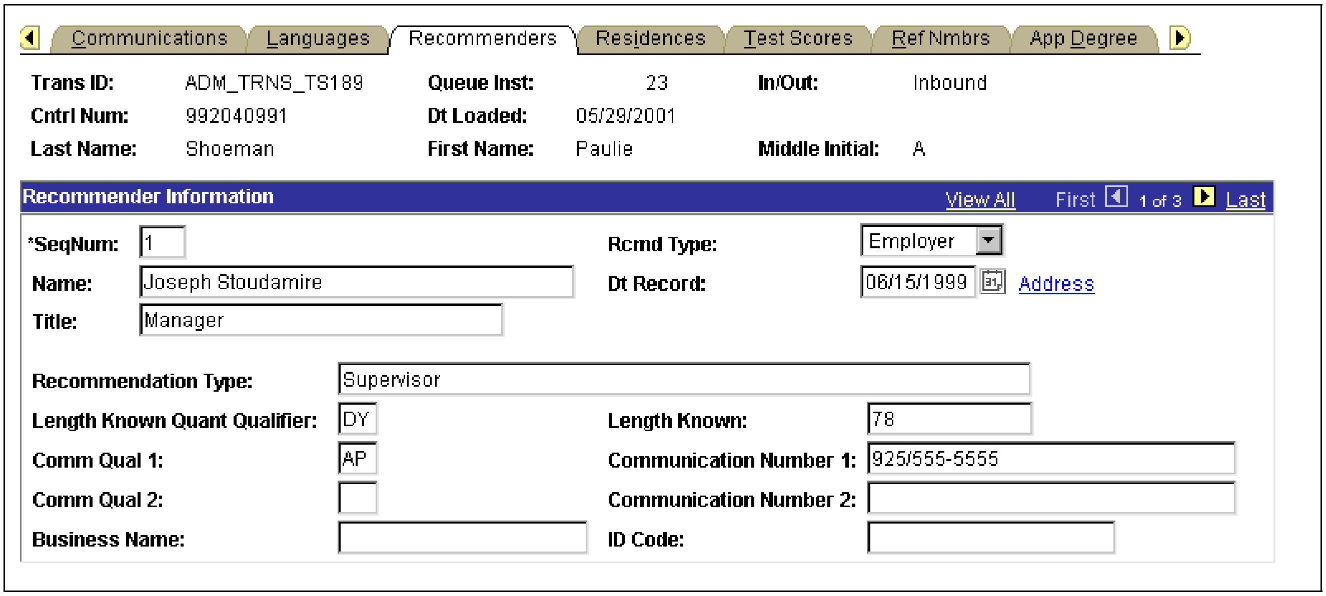
EDI TS189 Staging - Languages page

ID Code Qual (ID code qualifier)
: Indicates which set of language codes is being sent. The options are *Lang Cd* (language code) and *Mutually.*

ID Code
: A code that identifies the language (such as *KO* for Korean).

Reviewing EDI TS189 Staging Recommender Data

Access the Recommenders page.



EDI TS189 Staging - Recommenders page

Seq Num — The sequential number of this row of data. The first data item (or row) loaded is *1*. The next row is *2,* and so on.

Rcmd Type (recommendation type) — The recommendation type that the system posts to the General Materials component.

Dt Record (date record) — The date of the recommendation.

Recommendation Type — The free-form name or mutually defined indicator for the type of recommendation being supplied when there is a need to distinguish types of recommendations. Types might include "counselor evaluation," "faculty evaluation," "supervisor recommendation," and so on.

Length Known Quant Qual (length known quantity qualifier) — Codes that identify the format of the Length Known field. Possible codes are *DY* (days), *MN* (months), and *YY* (years).

Length Known — The amount of time the recommender has known the applicant. The code in the Length Known Quant Qual field defines the format of the number in this field. For example, if Length Known contains the value *78,* and the Length Known Quant Qual field contains *DY,* then the recommender has known the applicant for 78 days.

Comm Qual 1 and **2** — Codes identifying the type of communication number that appears in theCommunication Number 1 and 2 fields. Possible codes are:

Code	Name
AP	Alternate Telephone
AS	Answering Service

Code	Name
BN	Beeper Number
CP	Cellular Phone
EM	Electronic Mail
FX	Facsimile
HP	Home Phone Number
NP	Night Telephone
PC	Personal Cellular
TE	Telephone
WC	Work Cellular
WF	Work Facsimile Number
WP	Work Phone Number

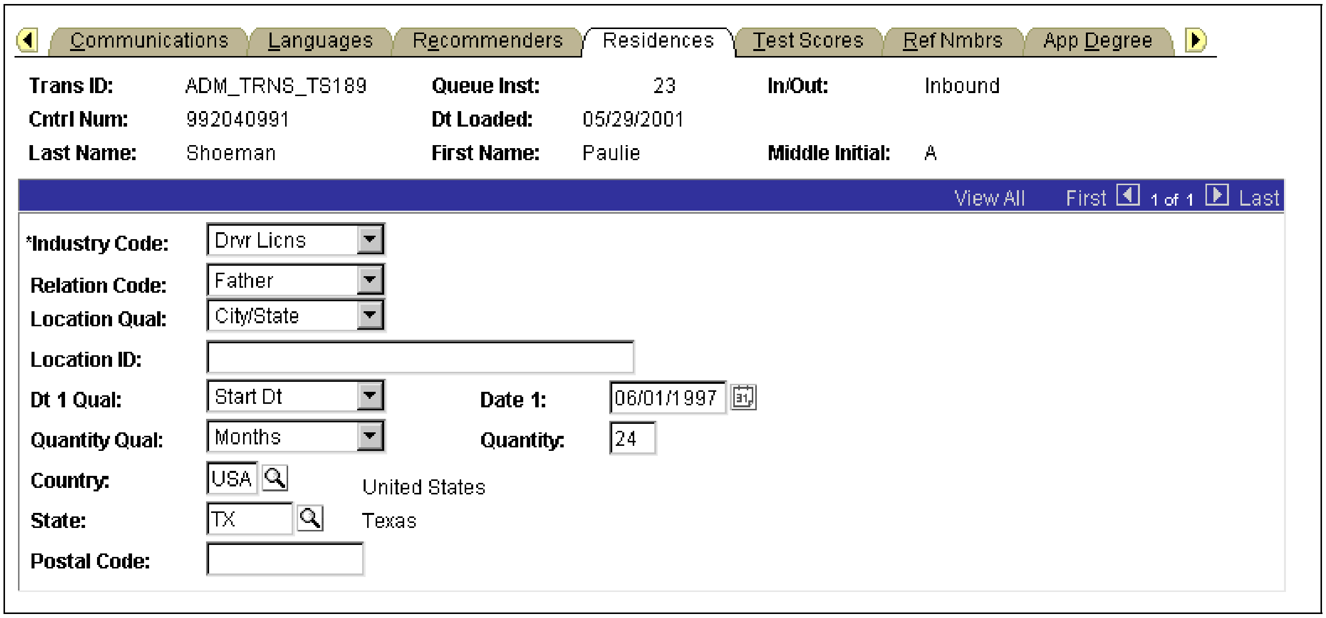
Communication Number 1 and **2** The complete communications number including country or area code (when applicable).

ID Code Identification of an organizational entity.

Address Click to access address information for this recommender. The Address Detail page appears.

Reviewing EDI TS189 Staging Residence Data

Access the Residences page.



EDI TS189 Staging - Residences page

Industry Code Indicates a particular criteria or test for determining residency.

Relation Code Indicates the relationship to the student of the individual to which this residency test or criteria applies. For example (not comprehensive): *01* (spouse), *03* (parent), *26* (guardian), *32* (mother), and *33* (father).

Location Qual (location qualifier) Code identifying the type of location.

Location ID Code identifying a specific location.

Dt 1 Qual (date 1 qualifier) Identifies what the date in the Date 1 field represents. For example, the date could represent the start date, the end date, the expiration date, and so on.

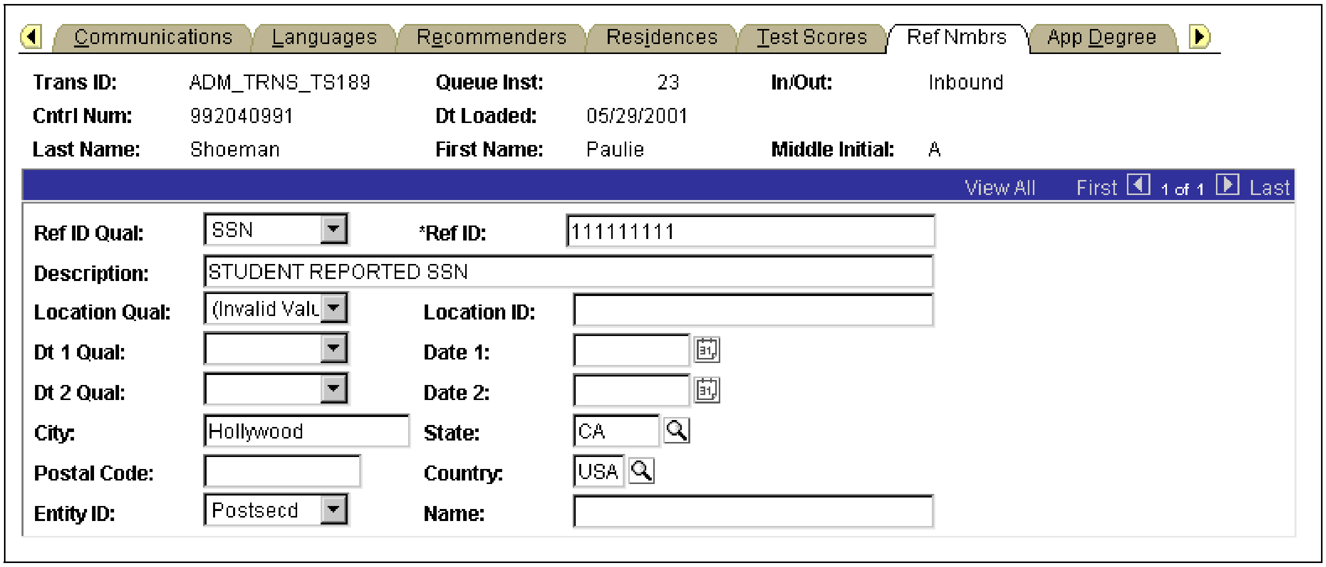
Date 1 The date that the Dt 1 Qual field identifies.

Quantity Qual (quantity qualifier) Identifies what the value in the Quantity field represents. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Days, Weeks, Months,* and *Years.*

Quantity The days, weeks, months, or years—as specified in the Quantity Qual field—that this person lived with this relation.

Reviewing EDI TS189 Staging Reference Numbers Data

Access the Ref Nmbrs (reference numbers) page.



EDI TS189 Staging - Ref Nmbrs page

Ref ID Qual (reference ID qualifier)
A code identifying what the reference ID represents. Some examples of reference ID qualifiers are (not comprehensive): SSN, state ID, PIN, visa number, and so on.

Ref ID (reference ID)
The Ref ID Qual field defines this number. For example, if the reference ID qualifier is *SSN,* then the reference ID number is the person's social security number.

Location Qualifier
A code identifying the type of location.

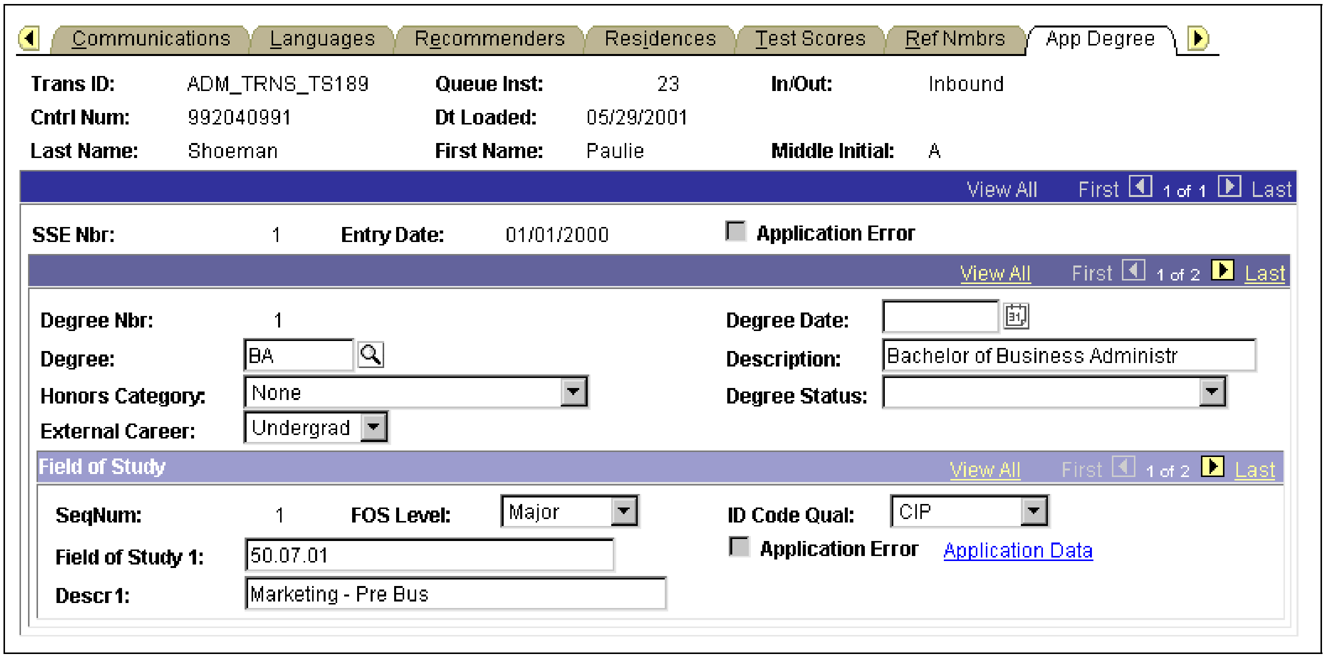
Location ID
A code identifying a specific location.

Dt 1 Qual (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier)
Identifies what the date in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, the expiration date, and so on.

Entity ID
The type of entity to which this name and location applies (for example, school, city, county, and so forth).

Reviewing EDI TS189 Staging Application Degree Data

Access the App Degree (application degree) page.



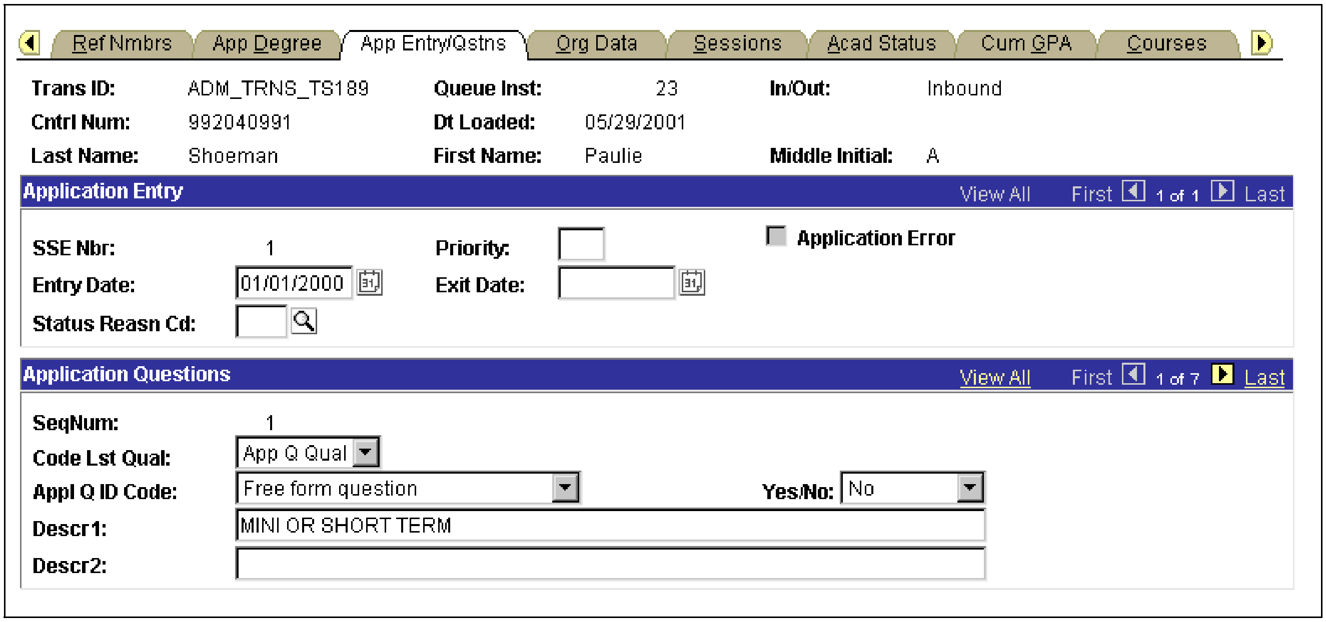
EDI TS189 Staging - App Degree page

ID Code Qual (ID code qualifier)	Identifies what the field of study represents. Mutually means that the value in the Field of Study 1 field is mutually defined.
Application Data	Click this link to view additional application data. The Application Data page appears.

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

Reviewing EDI TS189 Staging Application Entry/Questions

Access the App Entry/Questions (application entry/questions) page.

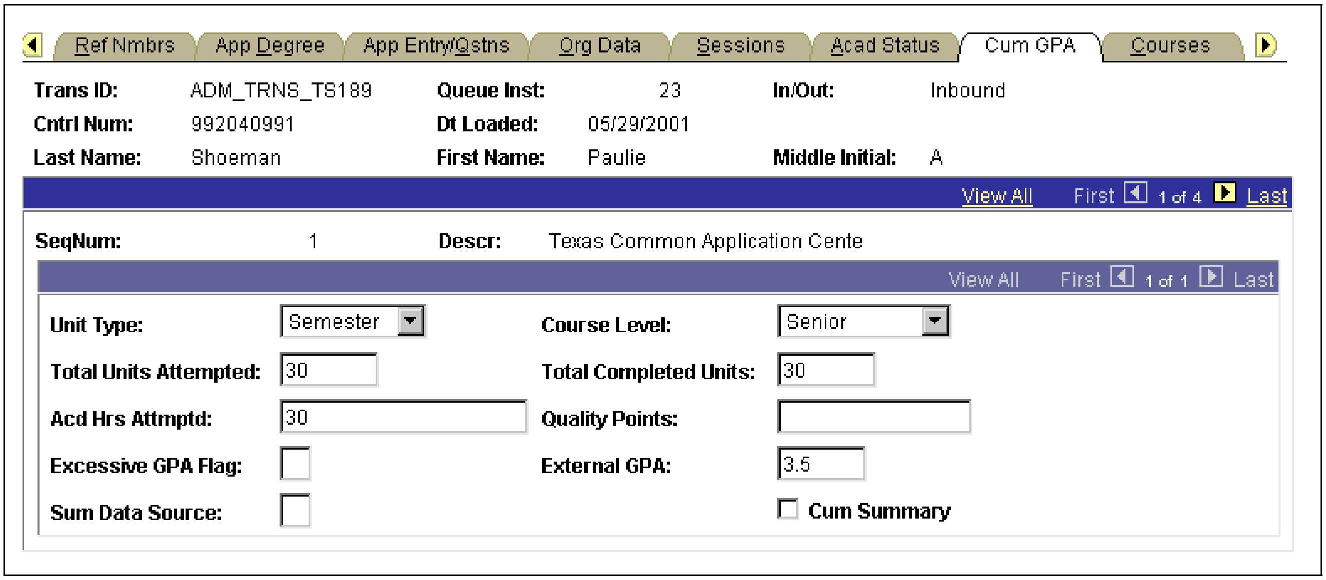


EDI TS189 Staging - App Entry/Qstns page

Priority	A number that indicates the priority of choice for an intended entry into a school, school program, or postsecondary institution.
Application Error	Indicates whether or not there was an error when loading this application data. (display only)
Entered Date	The applicant's desired entry date.
Exit Date	The applicant's desired exit date.
Status Reasn Cd (status reason code)	Indicates the status reason (such as dropout, graduated, and so forth).
Code Lst Qual (code list qualifier)	A code identifying a specific industry code list. For example, *App Q Qual* (application question identifier) and *Mutually Defined.*
Appl Q ID Code (application question identifier code)	A code identifying the type of question that was asked.
Yes/No	Indicates whether the applicant answered the question yes or no. The possible values are *N* (no), *U* (unknown), *W* (not applicable), and *Y* (yes).
Descr 1 (description 1)	A free-form question or indicator for a mutually defined question when the codified questions are not adequate.
Descr 2 (description 2)	The free form or fill-in-the blank response to the question when such a response is needed. Some questions require that an explanatory note accompany an answer (such as, "Have you ever been convicted of a crime?")

Reviewing EDI TS189 Staging Cumulative GPA Data

Access the Cum GPA (cumulative grade point average) page.



EDI TS189 Staging - Cum GPA page

Acd Hrs Attmptd (academic hours attempted) — The number of academic hours the person attempted.

Quality Points — The quality points used to compute the person's GPA.

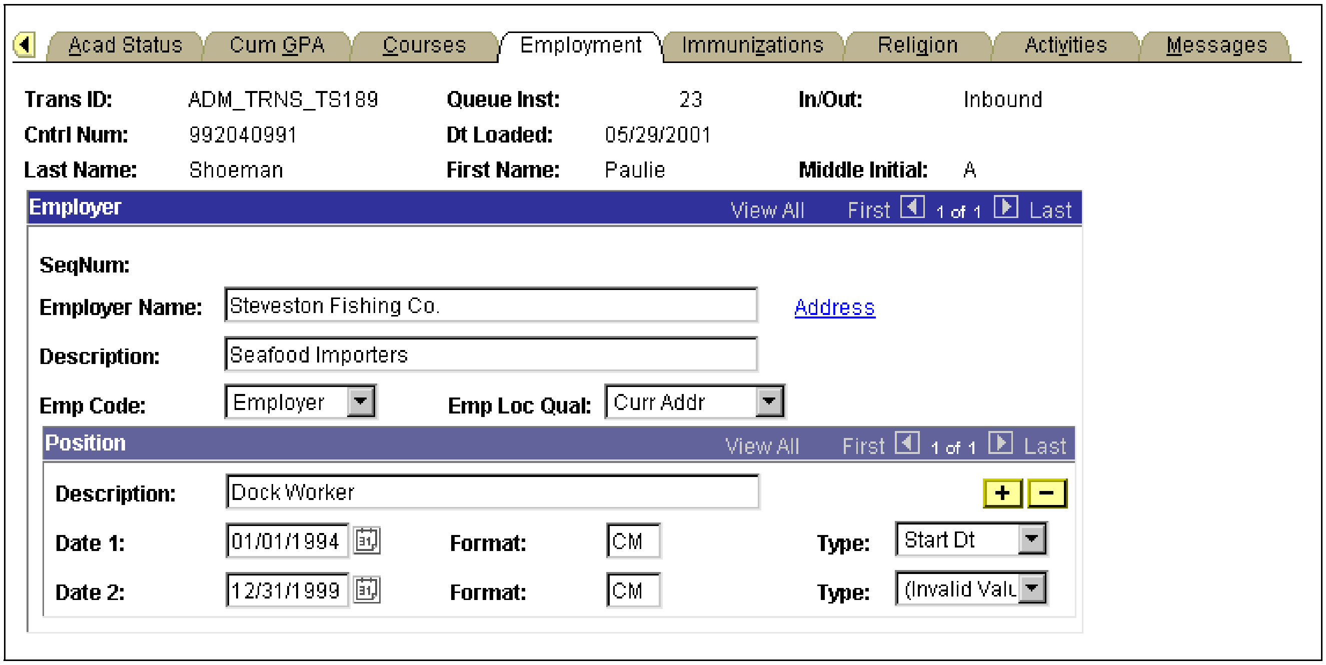
Excessive GPA Flag — Indicates that an A+ grade has a value higher than the highest possible GPA.

Sum Data Source (summary data source) — A code used to indicate the source of the summary data. The possibilities are *A* (self-reported) and *D* (college transcript).

Cum Summary (cumulative summary) — Indicates whether the summary is cumulative.

Reviewing EDI TS189 Staging Employment Data

Access the Employment page.



EDI TS189 Staging - Employment page

The Employer

Emp Code (employer code) The employer code. Values for this field are delivered with your system as translate values. You can modify these translate values. The possibilities are *Employer* or *Mutually.*

Emp Loc Qual (employer location qualifier) Defines the address type: home address, current address, local address, and so on.

The Position

Date 1 and **Date 2** The dates that the action in the Type field occurred. In the example in the preceding page shot, the start date of the position was January 1, 2000.

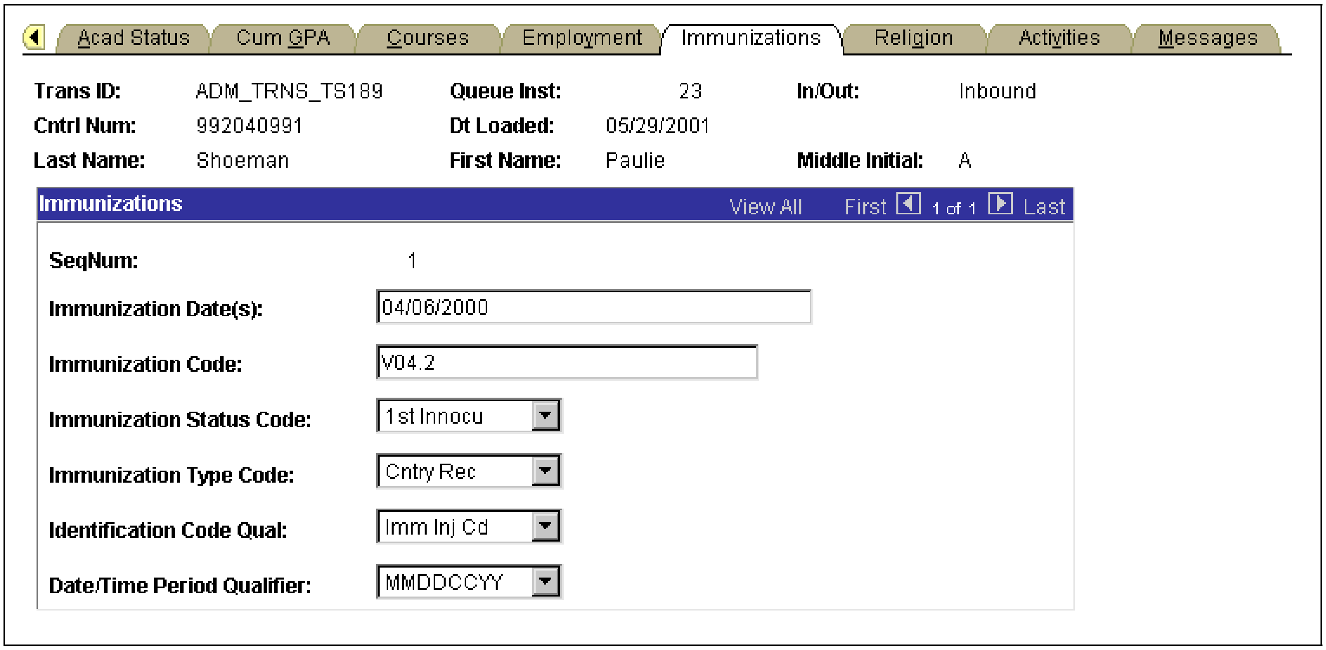
Format Defines the units in which the date is defined. For example, if the date is set at *CCYYMM,* then data represented as 01/01/2000 would be transmitted as 000101: century, year, month.

Type Specifies whether the date represents the starting date or the ending date.

Address Click to access address information for this employer. The Address Detail page appears.

Reviewing EDI TS189 Staging Immunizations Data

Access the Immunizations page.



EDI TS189 Staging - Immunizations page

Note. Immunization data does not post to the PeopleSoft Immunization Table.

Immunization Date(s) The date(s) that the immunization occurred.

Immunization Code The type of immunization a person received. The following table contains possible codes defined by the Postsecondary Electronic Standards Council. Some possible codes are:

Immunization Code	Description
V03.2	Vaccine for Tuberculosis
V03.6	Vaccine for Pertussis
V03.7	Tetanus Toxoid Inoculation
V04.01	Polio Oral
V04.02	Polio Immunization
V04.1	Vaccine for Smallpox
V04.2	Vaccine for Measles
V04.3	Vaccine for Rubella

Immunization Code	Description
V04.6	Vaccine for Mumps
V04.8	Vaccine for Influenza
V06.1	Vaccine for DTP
V06.12	TD

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

Immunization Status Code Indicates the status of an immunization conducted on a person. Possible codes are:

Code	Name
1	First Inoculation
2	Second Inoculation
3	Third Inoculation
4	Fourth Inoculation
5	Fifth Inoculation
6	Sixth Inoculation
7	Seventh Inoculation
8	Eighth Inoculation
9	Ninth Inoculation
10	Medical Exemption
11	Personal Exemption
12	Religious Exemption

Code	Name
13	Had the Disease
14	Has Not Had the Disease

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

Immunization Type Code Indicates the title or contents of a document, report, or supporting item. Some possible codes are:

Code	Description
CQ	County Record
HR	Health Clinic Records
IR	State School Immunization Records
MG	Migrant Student Records Transfer System (MSRTS) Record
PY	Physician's Report
ZZ	Mutually Defined

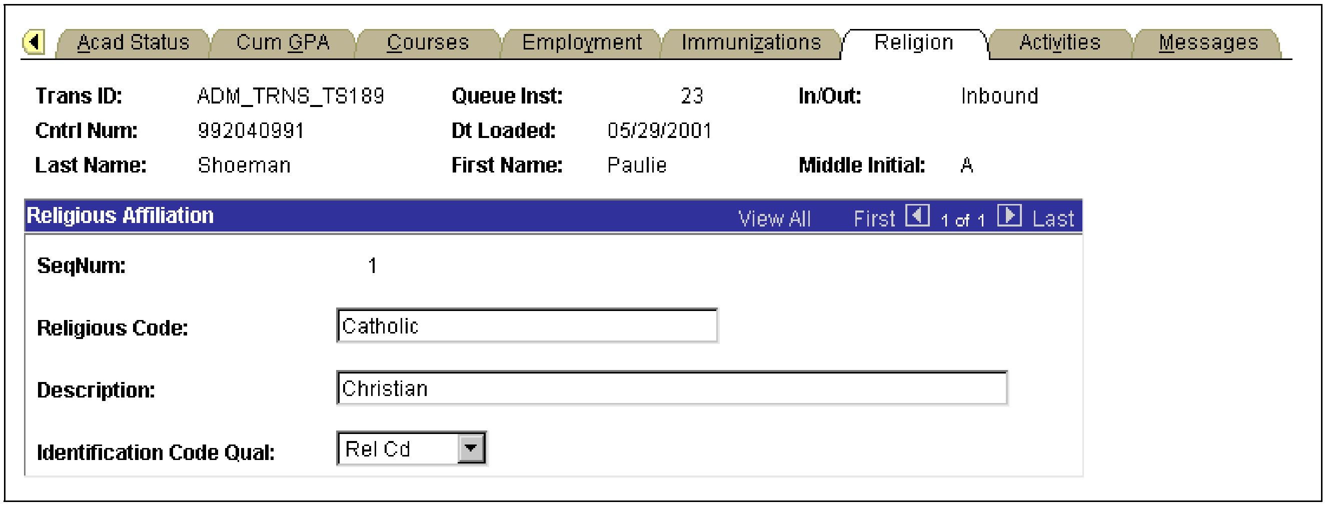
This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council Website.

Identification Code Qual (identification code qualifier) Identifies a specific industry code list, such as *AAW* (Immunization Injection Code).

Date/Time Period Qualifier Defines the units in which the Immunization Date(s) field is defined. For example, if the Date/Time Period Qualifier field is set at *MMDDCCYY,* then data represented as 04/06/2000 would be transmitted as 04062000.

Reviewing EDI TS189 Staging Religion Data

Access the Religion page.



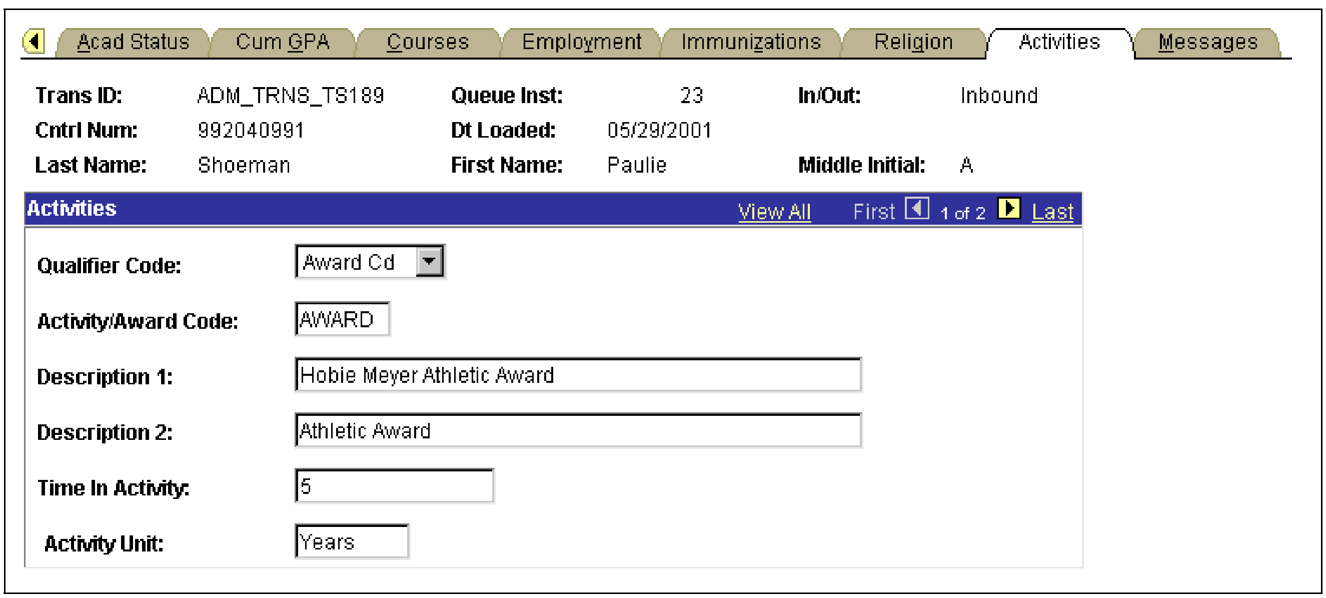
EDI TS189 Staging - Religion page

Identification Code Qual Identifies a specific industry code list, such as *REL Cd* (religion code).

Note. Religion data does not post to the PeopleSoft Religious Preferences Table.

Reviewing EDI TS189 Staging Activities Data

Access the Activities page.



EDI TS189 Staging - Activities page

Qualifier Code Identifies a specific industry code list, such as *Award Cd* (award code).

Searching for Matching Organization Data

Once you have loaded the application data into the staging files, you perform an organization search step. You must do the organization search because the TS189 load contains organization data—course information associated with a particular organization—that must be related to some record in your database.

This section discusses how to search for matching organization data.

Page Used to Search for Matching Organization Data

Page Name	Object Name	Navigation	Usage
EDI TS189 Org Search (EDI TS189 organization search)	ADM_TS189_ORG_PARM	Develop Enrollment, Process External Data, Proc E-F, EDI TS189 Org Search, EDI TS189 Org Search	Perform the organization search.

Using the EDI TS189 Organization Search Page

Access the EDI TS189 Org Search (EDI TS189 organization search) page.

Click the Run button to run the EDI TS189 App Org Search process at user-defined intervals.

Setting Up TS189 Search/Match/Post Parameters, Processing, and Posting the EDI Staging Files

Once you have reviewed the staging tables, specify on the Search/Match Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the EDI TS189 data and then you can run both processes at once: to search for matching people in your database and to post the external EDI TS189 data according to the parameters you set up.

Note. The recommended option is to select the Search, Match, and Post option to search for matching people in your database and post the EDI TS189 data to the database in one step.

To set up TS189 search/match/post parameters, process, and post the EDI staging files:

- Set up the EDI TS189 search/match parameters.
- Setting post parameters for EDI TS189 external data.
- Setting additional post parameters for EDI TS189 external data and posting the data.

Pages Used to Set Up TS189 Search/Match/Post Parameters, Process, and Post EDI Staging Files

Page Name	Object Name	Navigation	Usage
Post Parameters	ADM_TS189_PST_PARM	Develop Enrollment, Process External Data, Proc, EDI TS189 People Search/Post, Post Parameters	Post EDI TS189 application data. You can post a single record or all records in the staging table.
Post Parameters 2	ADM_TS189_PST_PRM2	Develop Enrollment, Process External Data, Proc E-F, EDI TS189 People Search/Post, Post Parameters 2	Enter additional run control defaults, such as contact type, external career, summary type, and material group information.

Setting Up the EDI TS189 Search/Match Parameters

Use the Search/Match Parameters page to set up your search/match parameters for processing the EDI TS189 application staging table.

Select Develop Enrollment, Process External Data, Proc, EDI TS189 People Search/Post, Search/Match Parameters.

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Setting Up Search/Match Parameters, page 235

Setting Post Parameters for EDI TS189 External Data

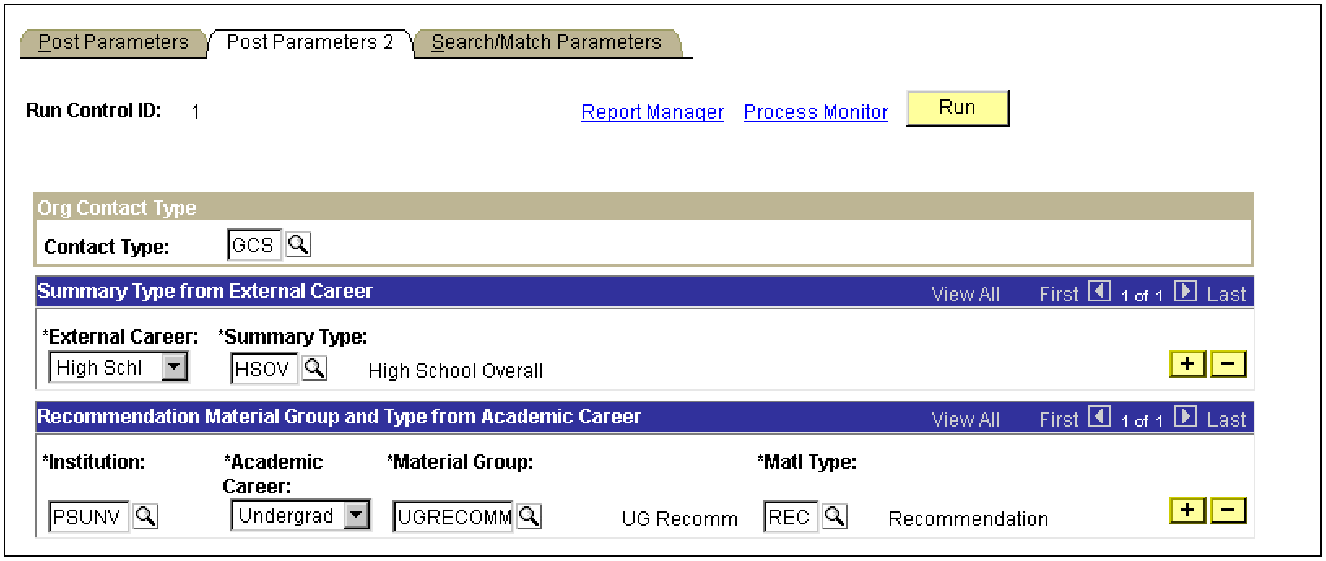
Access the Post Parameters page. Use the Post Parameters page to post EDI TS189 application data. You can post a single record or all records in the staging table.

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Posting the EDI TS130 External Data, page 237

Setting Additional Post Parameters for EDI TS189 External Data

Access the Post Parameters 2 page.



Post Parameters 2 page

Contact Type

Select the contact type to enable the posting of new organization and organization contact information that is loaded with the TS189 file.

External Career and **Summary Type**

These are cross reference fields that work in conjunction with external academic summary data from incoming applications. The two fields enable the posting of external GPAs to students' external education records (external GPA is tied to summary type, which is a child of external career). External career data is loaded with the TS189 file. By defining desired summary types for each external career that has been loaded, the EDI TS189 PeopleSearch/Post process writes external career, summary type, and external GPA data to the external education record.

Institution, Academic Career, Material Group, and **Matl Type** (material type)

These fields enable the posting of recommendation material group information. Select material groups that represent recommendations and the recommendation material type. Recommendation material group information gets posted to the general materials page. Define material groups on the Material Group Table page.

Purging the EDI TS189 Staging Table and Messages

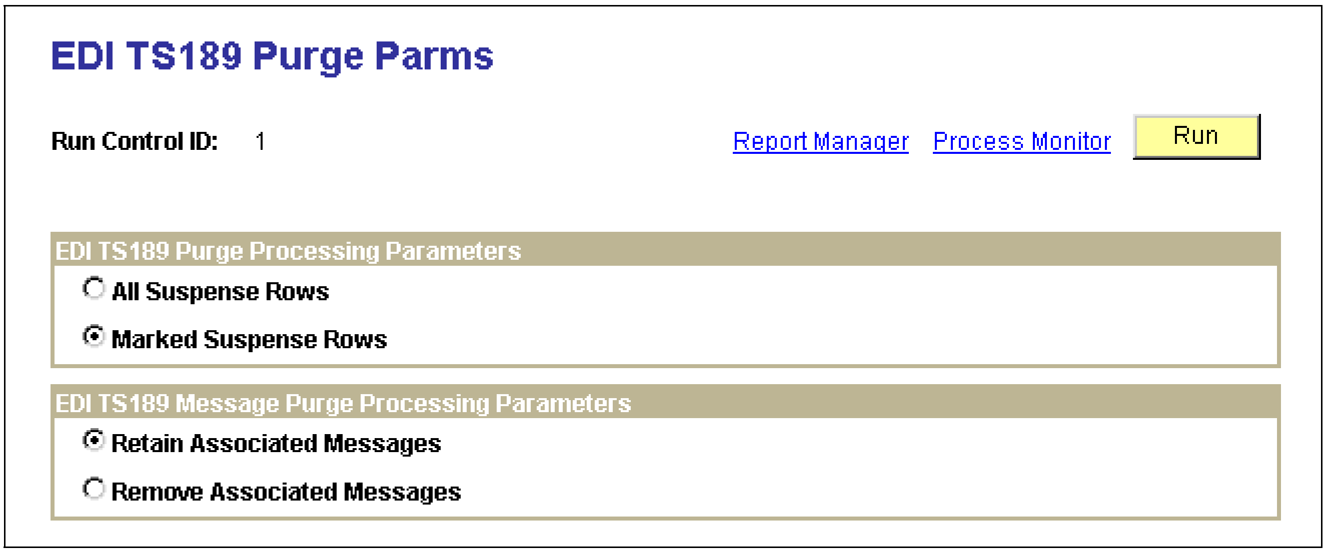
This section discusses how to use the EDI TS189 Purge Parms (EDI TS189 purge parameters) page to purge records and messages, if applicable, from the EDI TS189 staging table.

Page Used to Purge the EDI TS189 Staging Table and Messages

Page Name	Object Name	Navigation	Usage
EDI TS189 Purge Parms (EDI TS189 purge parameters)	ADM_TS189_PUR_PARM	Develop Enrollment, Process External Data, Proc E-F, EDI TS189 Purge, EDI TS189 Purge Parms	Purge records and messages, if applicable, from the EDI TS189 staging table.

Purging the EDI TS189 Staging Table and Messages

Access the EDI TS189 Purge Parms (EDI TS189 purge parameters) page.



EDI TS189 Purge Parms

The EDI TS189 Purge Processing Parameters

All Suspense Rows Select this option if you want to purge all records in your staging table, regardless of what is in the Post field on the Process Options and Org Process Options pages.

Marked Test Suspense Rows Select this option if you only want to purge those records in your staging table marked *Purge* on the Post field on the on the Process Options and Org Process Options pages.

The EDI TS189 Message Purge Processing Parameters

Retain Associated Messages Select this option if you do not want to purge messages associated with the files that you're purging.

Remove Associated Messages Select this option if you want to purge messages associated with the files that you're purging.

Click the Run button to run the EDI TS189 Application Purge process at user-defined intervals.

CHAPTER 17

Processing External Test Score Data

This chapter provides overviews and discusses how to:

- Load external test data files.
- Correct and edit data in the suspense record.
- Perform search/match and post external data.
- Research duplicate records.
- Re-run the search/match/post process.
- Purge suspense files and test score messages.
- Review additional external test data.
- Create an application from ADA, AMCAS, or LAW test data.
- View test score messages summary information.

Understanding How to Process External Test Score Data

To Process External Test Score Data:

1. Load the test score data from a file in your directory into a suspense table using the external data load process.
2. Review and edit the data that you loaded in suspense pages.

   Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Go into each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error)* in the Edit field on the (Test) Suspense − Process Options page.
3. Once you have corrected all of the load errors, run the search/match/post process.

   This process looks for data in your database (based on search parameters that you define on the search/match criteria pages, to include name, social security number, birth date, and so forth) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process will not post the record until you can manually determine which records are truly duplicative.
4. Go into each suspense record that did not get posted and check to see if it is truly a duplicate.

In the search dialog page of the suspense component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. Once you are in the component, find the parameters for which the process identified a match, then use Search Match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who truly matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

5. Run the search/match/post process again.

   The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Develop Enrollment, Process External Data, Use, Bio/Demo Data. To view a test score record that the search/match/post process created or updated, select Develop Enrollment, Process External Data, Use, Test Scores.

6. Purge the suspense tables.

   We recommend that you purge the suspense tables as soon as all of the suspense records have been posted to the database. This helps you to avoid confusion the next time you load data into the suspense tables.

7. Review Student Profile or Additional Candidate Information, if desired.

   When external test data loads contain information such as student profile and additional candidate information, the search/match/post process stores the data in the (Test) Student Profile Section and (Test) Additional Candidate Information components.

See Also

Chapter 17, "Processing External Test Score Data," Reviewing Additional External Test Data, page 297

Understanding External Test Score Data Processing

The ability to receive external test score data and post it to your database is integral to evaluating applicants. Academic institutions receive hundreds if not thousands of test score data per year. Using your PeopleSoft Recruiting and Admissions application, you can receive external test score data, review the data for errors, and post the data, confident that you are not creating duplicate IDs.

PeopleSoft Recruiting and Admissions supports many test score data loads, such as loads for the ACT, GRE, GMAT, SAT, and TOEFL, to name only a few. The ultimate goal in processing external test score data is to update test score data for individuals through electronic data loads. Your institution receives tapes that contain scores, bio/demo, and sometimes transcript data for individuals. For each test, you first load the data into suspense tables. Then, you ensure that you are not going to create any duplicate bio/demo or test records—it's very hard to identify and correct duplicate records once they've been created. Finally, you post the bio/demo and test score data to your database—the search/match/post process posts self reported academic information to student profile and additional candidate information tables. You follow this process for each test.

Understanding External Test Data Loads

There are many different external test data files that you can load. You use a distinct page to load each external test data file, however, these pages are very similar to each other in the way they look and work. Therefore, here is one example of the pages that you use to load the files.

The following table contains the load process name for each test, and the corresponding page through which you initiate the load process.

Test	Load Process Name	Page
ACT	ACT Test Score Load (ADACTLOD)	ACT Load/Edit Parms (ACT load/edit parameters) page
ADA	ADA Load External Data (ADADALOD)	ADA Load/Edit Parms page ADA Test Code Parms page
AMCAS	AMCAS Load from External File (ADAMCLOD)	AMCAS Load/Edit Parms page
AP	AP Load External Data (ADAPLOD)	AP Load/Edit Parms page AP Subject Test Code Parms page
CRS	CRS Load External Data (ADCRSLOD)	CRS Load/Edit Parms page
DAT	DAT Load External Data (ADDATLOD)	Load/Edit Parms page Test Code Parms page
EOS	EOS Test Score Load (ADEOSLOD)	Load/Edit Parms page
GMASS	GMASS Load External Data (ADGMSLOD)	GMASS Load/Edit Parms page
GMAT	GMAT Load External Data (ADGMTLOD)	GMAT Load Parms page
GRE	GRE Test Score Load (ADGRELOD)	GRE Load/Edit Parms page GRE Subject Test Code Parms page
LAW	LSAT Load External Data (ADLSTLOD)	LAW Load/Edit Parms page

Test	Load Process Name	Page
SAT	SAT Test Score Load (ADSATLOD)	SAT Load/Edit Parms page SAT II Test Code Parms page
SSS	SSS Test Score Load (ADSSSLOD)	SSS Load/Edit Parms page SSS AP Subj Test Code Parms (SSS AP subject test code parameters) page
TOEFL	TOEFL Load External Data (ADTOFLOD)	TOEFL Load/Edit Parms page CBT Test Code Parms page PB and TSE Test Code Parms page

Loading External Test Data Files

To run an external test data load process, you must enter the directory path where the test data file lives (such as \\network\test files\ACT_1.dat), so you must know where the test data file resides in your directory. The process loads the data from the file into suspense tables.

To load external test data files:

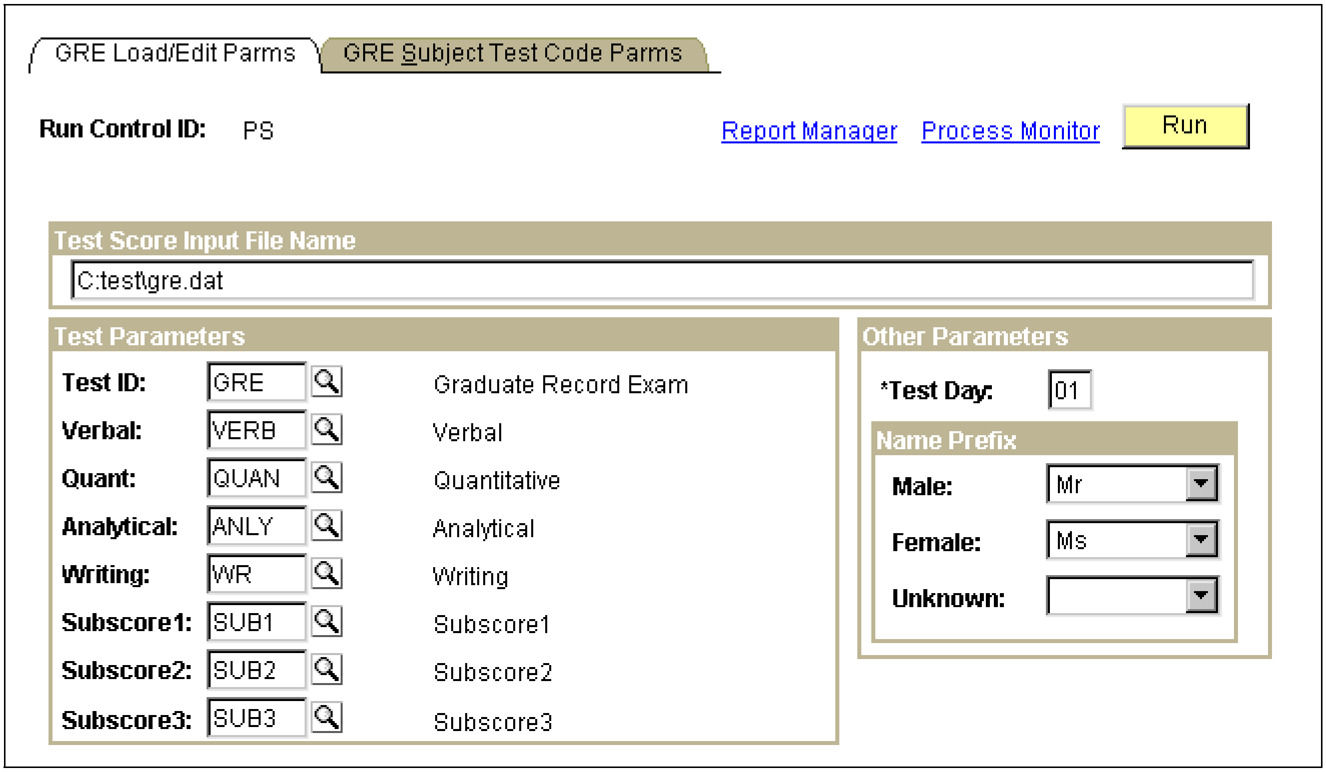
- Set up load/edit parameters.
- Set up code parameters.

Pages Used to Load External Test Data Files

Page Name	Object Name	Navigation	Usage
(Test) Load/Edit Parms (load/edit parameters)	ACT_LOAD_PARMS, ADA_LOAD_PARMS, AMCAS_LOAD_PARMS, AP_LOAD_PARMS , CRS_LOAD_PARMS , DAT_LOAD_PARMS, GRE_LOAD_PARMS, LSAC_LOAD_PARM, SAT_LOAD_PARMS, SSS_LOAD_PARMS, TOEFL_LOAD_PARMS	Develop Enrollment, Process External Data, Proc, (Test) External Data Load	Set up the load parameters for each test, and to designate the directory location of the test data that you are loading. **Note.** We recommend that you complete the full loading, search/match and posting process before loading a new set of data. Therefore, if you have test data waiting to be processed, such as ACT test data, do not load a new ACT test data file until you have processed the data in your ACT suspense files.
(Test) Subject Test Code Parms (subject test code parameters)	ADA_LOAD_PARMSII, AP_LOAD_PARMS_SUB, DAT_LOAD_PARMS, EOS_LOAD_PARMS, GMASS_LOAD_PARMS, GMAT_LOAD_PARMS, GRE_LOAD_PARMS_SUB, SATII_LOAD_PARMS, SSS_LOAD_PARMS_SUB, TOEFL_LOAD_PARMS1	Develop Enrollment, Process External Data, Proc, (Test) External Data Load	Set up the subject test code parameters.

Setting Up Load/Edit Parameters and Loading the File

Access the GRE Load/Edit Parms page.



GRE Load/Edit Parms page (GRE_LOAD_PARMS)

Test Score Input File Name

Test Score Input File Name

Enter the path of the directory and file where the test data resides.

For the ADA test only: in the AADSAS field, enter the name of the directory and file where the AADSAS data resides. This is the bio/demo and test score data. In the AADSAS (Crs) field, enter the name of the directory and file where the AADSAS course data resides. This is course data only and is linked to the matching person's test score record.

Test Parameters

Test ID

Select the test that you want to load. Define test ID values on the Test Tables page.

English, Math, Reading, Science Reasoning, and **Composite**

Select components that you defined on the Test Component Table page that correspond to the official test components. The components and definitions that you define are those that post to a person's record.

Each test contains different components; therefore the components displayed in the example above may not match the test that you are loading.

Score and **Percentile**

For the EOS, GMASS, and SSS only: for each component, enter the score and percentile that you want to appear for all of the EOS, GMASS, and SSS records that you load. EOS, GMASS, and SSS are search tapes. Your institution buys the names of students who have taken these tests with specific scores. Thus, you must enter the scores on which you based your selection criteria.

Other Parameters

Test Day, Test Month, and **Grad Day** (graduation day)	The PeopleSoft date format requires a day, month, and year. If the date format for a test omits one of these numbers, the system asks you to enter the numeric value for the missing number (such as day, month, or graduation day) that you want the load process to use when it converts the date to the PeopleSoft date format. Your valid options are *1* through *28.*
LSAT/LSDAS Test Score	For LAW only: Select *LSAT* or *LSDAS* to indicate the type of file that you are loading.

Search Selection (SSS)

SAT I Search, PSAT/NMSQT Search, or **AP Search**	For the SSS only: your institution can buy the names of students who have either taken the SAT I, PSAT/NMSQT, or AP exams. Select the search tape that you are loading. The format of the file varies according to the test that you are loading.

School Tape Type (SAT)

School Tape Type	For the SAT only: select the type of file that you're loading: *College* or *Secondary.*

Name Prefix

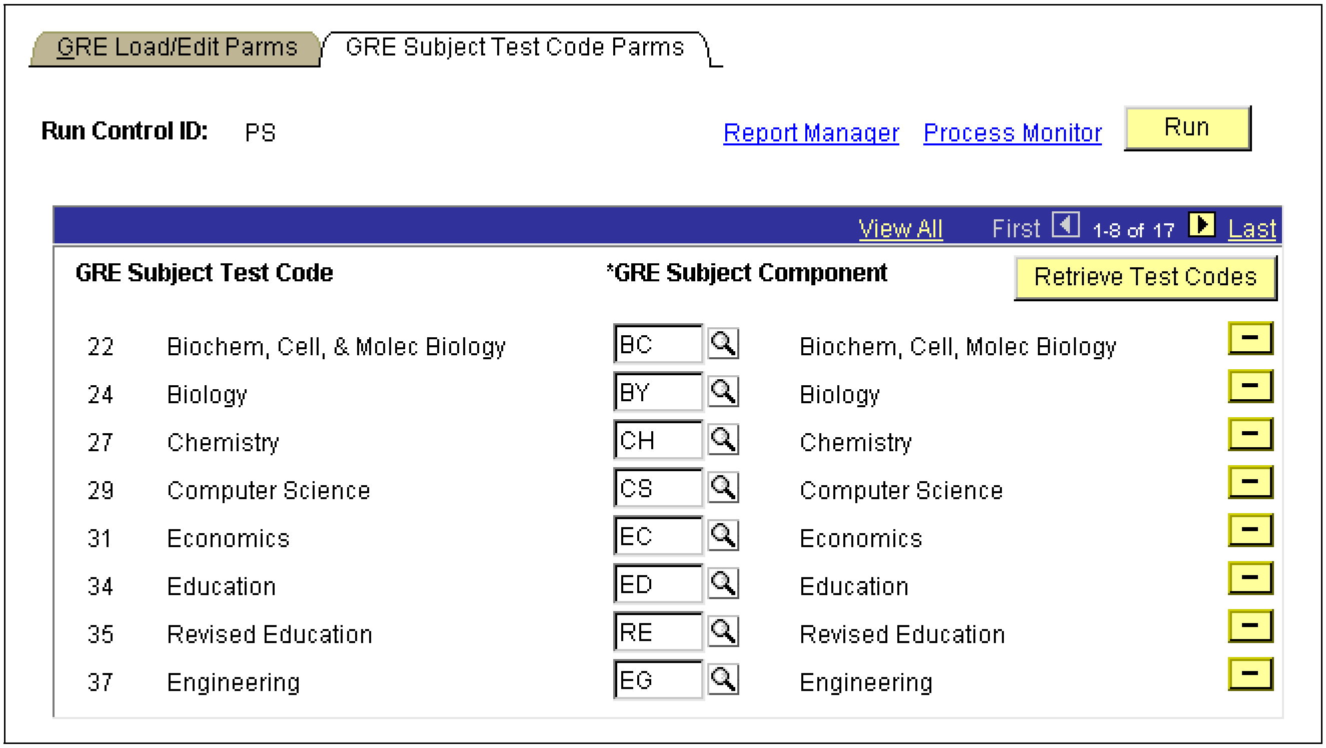
Male, Female, and **Unknown**	Test data loads do not include name prefixes. They do, however, include gender. Enter the prefix according to the gender provided in the test data load. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Dr, Miss, Mr, Mrs,* and *Ms.*

Middle Name Load Option (AMCAS and DAT)

Initial or **Full**	For the AMCAS and DAT only: select one of these options to determine whether to have the system load the student's middle name initial or the full middle name. The default setting is to load the middle initial.

Setting Up Code Parameters

Access the GRE Subject Test Code Parms page.



GRE Subject Test Code Parms page (GRE_LOAD_PARMS_SUB)

After you enter your initial test parameters, you set up the subject test code parameters. Select the test component codes defined by your institution that you want to post in place of the codes used in the delivered test data. For example, the GRE subject test code for Biology is *22.* Your institution likely has a different code for this test component, such as *BY,* which you would prefer to use. Once you have set up the components, you can run the external test data load process from the subject test code parameters pages.

Not all tests require you to enter test code parameters. You can identify tests that require you to enter this information by the presence of the second tab in the (Test) Load External Data component. The tests that do require you to enter test code parameters are ADA, AP, DAT, GRE, SAT, SSS, and TOEFL. The TOEFL Load External Data component contains three pages because the test code parameters are spread over two pages.

Test code parameter pages look very similar to each other, and they work the same. Each page consists of two columns. The left column is the delivered test code. This is the code that the testing organization defines. (To view the delivered codes, selectDevelop Enrollment, Process External Data, Setup, then choose the component that you want to review.) The right column is the corresponding component that you defined on the Test Component Table page. Select the test component codes defined by your institution that you want to post in place of the codes used in the delivered test data.

If you are adding test code parameters for a new run control ID, the page does not list any codes. Click the Retrieve Test Codes button to copy the codes from the test codes table.

Click the Run button to run the external test data load process at user-defined intervals.

Correcting and Editing Data in the Suspense Record

To correct and edit data in the suspense record, you must review:

- Process options.
- External test bio/demo data.
- Test score data.
- Additional test score data.
- Permanent address information.
- Identification data.
- Family information.
- High school and degree detail data.
- Additional cumulative education data.
- Graduate education data.
- Undergraduate education data.
- College detail information.
- Additional question information data.
- Course information.
- Test messages.

Understanding Correcting and Editing Suspense Data

You use the suspense components to correct processing errors at two different times: first, to correct external test data load errors, and second, to correct search/match processing errors. You can also edit information in the suspense record. However, remember that the search/match/post process only posts bio/demo data and test score data to your database. The system stores additional data that the test loads contain (such as additional candidate information and student profile section information) in their own components. However, this data does not affect other tables in your database. But again, you can edit this data if you want while it is in the suspense record.

Each test has its own suspense component. The pages in the different components are very similar in the way they look and work. For example, every suspense component has bio/demo data and additional items depending on the type of information the testing agency collects during the testing process. Some testing agencies ask questions about college preferences, high school activities, and transcript information. Independent of the testing agency, core and supplemental data are handled similarly within the system. Therefore, this book discusses the suspense component only once. To view the specific data that appears in the suspense record for each test, navigate to that test's suspense record.

In addition, much of the data that the load process loads into the suspense record is data the person entered when completing the student profile section of the test. If the person left out information, or did not complete the entire section, there will be empty fields in the suspense component.

Many of the values and codes that appear in the suspense component are based on values and codes that the testing agency in question defines. Therefore, please contact the testing agency that manages the test with which you are concerned for full descriptions of the data that appears in these pages.

Correcting Load Errors

An error occurs in the load process when a required value is missing or invalid in the data load. For example, PeopleSoft requires a first and last name for each person in the database. So if a first or last name is missing in the data load, the load process generates an error. Other values that can generate an error in the data load are birthday, test date, and test scores (among others). An invalid test score is a score that is outside the valid test score range according to the ranges that you defined on the Test Table page. An invalid date is one that contains more than 12 months or 31 days. Be sure to correct all errors before posting the data.

The load process indicates that it encountered an error by displaying *Error* in the Edit field on the (Test) Suspense − Process Options page in the suspense component (each test has its own suspense component, such as ACT Suspense, AMCAS Suspense, and so forth). In addition to displaying *Error* in the Edit field, the load process indicates which value or values were missing in the load by selecting the appropriate check boxes in the Error Indicators group box (also on the Process Options page). Find the field that contains the missing value and enter a valid value. You can find the First Name, Last Name, and Birthdate fields on the Bio/Demo page, and the Test Date and Test Component fields on the Tests page. For other error indicators, look through the suspense component to find the corresponding field and enter a valid value.

Once you enter a valid value for the fields that were missing or incorrect, save the component. The Edit field on the Process Options page should now display *Complete.*

Note. Data in suspense tables does not affect tables in your database until you post the data by running the search/match/post process. In addition, if you find an error in the suspense component after you run the search/match/post process, you would need to go to the proper page in your database to make any changes. For example, if you found an error on the Bio/Demo page in the suspense component, you would need to go to the Bio/Demo Data component in the Process External Data menu for this person to correct the error.

Correcting Search/Match Errors

By comparing data in suspense records with data in your database, the search/match/post process prevents duplicate records in your database. Sometimes you must determine manually whether or not a record is duplicative. In these cases, the search/match/post process does not post the record to the database. The process indicates this by displaying *Complete* in the Edit field on the Process Options field and *Perform* in the Search field. The process also displays the search/match level involved in the possible match—and the number of individuals in the database that match the criteria—in the Search/Match Results group box. In this case, you must manually compare the suspense record to the bio/demo records in your database and decide whether a match truly exists.

For example, suppose that the Order Number field in the Search/Match Results group box displayed 40. At PSUNV, row 40 means that the process is checking for a matching name and gender. So if there is anyone else in the database with the same name and gender as the person in the suspense record the search/match/post process keeps the record in the suspense table as previously explained. Because you know the criteria with which the process found the possible match, you can search on those criteria to see if the record is duplicative. Search the database by name to find the possible duplication, then compare other information (such as social security number) to determine whether or not the person in the database is the same as in the suspense record.

You can also search for duplicate records using the Search/Match component. Select Develop Enrollment, Process External Data, Inquire, Search/Match.

If the person from the test data load is *not* the same person as in your database, set the Search field to *Complete* (which tells the search/match/post process to process this record the next time it is run), and the Post field to *New ID Add* (which adds a new ID for this person).

If the person from the test data load *is* the same person as in your database, set the Search field to *Complete,* and the Post field to *Update ID* (which would update the person's record). Then go to the Bio/Demo page in the suspense component and enter the ID that you want to update. Note, however, that the search/match/post process only *updates* test score, additional candidate, and student profile information. The process does not update bio/demo data because some bio/demo data may have already been verified.

The following suspense pages comprise an example of one particular suspense component (ADA). To access the suspense component for a particular test, select Develop Enrollment, Process External Data, Use, (Test) Suspense.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Searching for Records," Using Search/Match

Pages Used to Correct and Edit Data in the Suspense Record

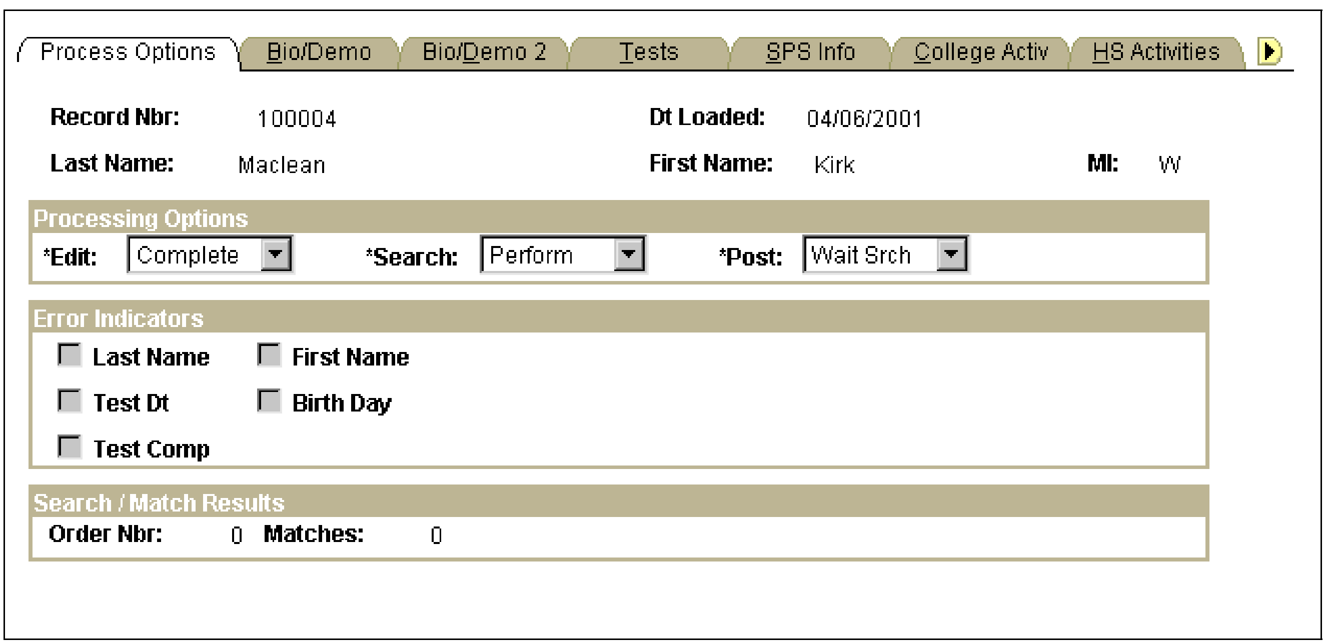
Page Name	Object Name	Navigation	Usage
Process Options	ACT_SUSP_PROC_OPTN, ADA_SUSP_PROC_OPT, NAMCAS_SUSP_ PROC_OPTN, AP_SUSP_PROC_OPTN, CRS_SUSP_PROC_OPTN, DAT_SUSP_PROC_OPTN, EOS_SUSP_PROC_OPTN, GMAT_SUSP_PROC_OPTN, GMASS_SUSP_PROC_OPTN, GRE_SUSP_PROC_OPTN, LSAC_SUSP_PROC_OPTN, SAT_SUSP_PROC_OPTN, SSS_SUSP_PROC_OPTN, TOEFL_SUSP_PROC_OP	Develop Enrollment, Process External Data, Use, (Test) Suspense	View and correct load process results.
Bio/Demo	ACT_SUSP_BIO_DEMO, ADA_SUSP_BIO_DEMO, AMCAS_SUSP_BIO_DEMO, AP_SUSP_BIO_DEMO, CRS_SUSP_BIO_DEMO, DAT_SUSP_BIO_DEMO, EOS_SUSP_BIO_DEMO, GMASS_SUSP_BIO_DEMO, GMAT_SUSP_BIO_DEMO, GRE_SUSP_BIO_DEMO, LSAC_SUSP_BIO_DEMO, SAT_SUSP_BIO_DEMO, SSS_SUSP_BIO_DEMO, TOEFL_SUSP_BIO_DEMO	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit bio/demo data in the suspense record.

Page Name	Object Name	Navigation	Usage
Bio/Demo2	ACT_SUSP_BIO_DEMO2, ADA_SUSP_BIO_DEMO2, AMCAS_SUSP_OTH, AP_SUSP_OTH	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit citizenship and enrollment information in the suspense record.
Test Scores	ACT_SUSP_TESTS, ADA_SUSP_TESTS, AMCAS_SUSP_TESTS, AP_SUSP_TESTS, CRS_SUSP_TESTS, DAT_SUSP_TESTS, EOS_SUSP_TESTS, GMASS_SUSP_TESTS, GRE_SUSP_TESTS, LSAC_SUSP_TESTS, SAT_SUSP_TESTS, SSS_SUSP_TESTS, TOEFL_SUSP_TESTS	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review or edit test data in the suspense record. Some of the information on this page is required (such as test date and test components). If this information is missing in the external test data load, you will have to enter valid values here before posting the record.
Test Scores 2	ADA_SUSP_TESTS2, AMCAS_SUS_TST_INFO, GMAT_SUSP_TST_COMP, GRE_SUSP_SUB_TESTS, SAT_SUSP_SATII_C, SSS_AP_SUS_TST_COM	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review or edit additional test score data in the suspense record.
Perm Address (permanent address)	ADA_SUSP_OTH_BIO	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit permanent address data in the suspense record.
Identification	ADA_SUSP_OTH_BIO3	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit identification data in the suspense record.
Family Info (family information)	ADA_SUSP_OTH_BIO2	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit family information in the suspense record.
Education	ACT_SUSP_HS , ADA_SUSP_OTH , AP_SUSP_SCH , LSDAS_SUSP_SCH , SAT_SUSP_ACTHSCL	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit high school and degree detail information in your suspense file.
Education 2	ADA_SUSP_SUPPL	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit identification data in the suspense record.
Education 3	ADA_SUSP_SUPPL2	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit graduate education data in the suspense record.
Education 4	ADA_SUSP_SUPPL3	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit undergraduate education data in the suspense record.

Page Name	Object Name	Navigation	Usage
College Details	ACT_SUSP_COLL , ADA_SUSP_COL , AMCAS_SUSP_COL	Develop Enrollment, Process External Data, Use, (Test) Suspense	Use the College Details page to review and edit college data in the suspense record.
Addl Info (additional information)	ADA_SUSP_EXTRA, SAT_SUSP_SDQ, SSS_SUSP_SDQ	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit additional question information in the suspense record.
Course Info (course information)	ADA_SUSP_COURSE	Develop Enrollment, Process External Data, Use, (Test) Suspense	Review and edit course information in the suspense record.
Test Messages	ACT_TST_SCORE_MSG, ADA_TST_SCORE_MSG, AP_TST_SCORE_MSG, CRS_TST_SCORE_MSG, DAT_TST_SCORE_MSG, EOS_TST_SCORE_MSG, GMASS_TST_SCORE_MSG, GMAT_TST_SCORE_MSG, GRE_TST_SCORE_MSG, LSAC_TST_SCORE_MSG, SAT_TST_SCORE_MSG, SSS_TST_SCORE_MSG, TOEFL_TST_SCORE_MSG	Develop Enrollment, Process External Data, Use, (Test) Suspense	View test score messages.

Reviewing Process Options

Access the Process Options page.



Process Options page (ADA_SUSP_PROC_OPTN)

Each external test has a corresponding suspense component, and each suspense component contains a Process Options page. This page provides the status of a suspense record regarding the loading, search/match and posting processes.

Processing Options

Edit

Displays the status of the load process for this suspense record. The load process populates this value.

Complete: The load process loaded the test score data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the test score data. The system indicates the values that you must correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. Once you correct the errors and save the component, the system changes the field value to *Complete.*

Perform: You set this value manually. This is for informational purposes only.

Search

Displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process processed the external test score data without a problem. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the Bio/Demo page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.

Error: The search/match process encountered problems when processing the test score data.

Perform: The search/match process will process this record the next time you run the process.

Post

Displays the status of the record regarding the search/match/post process. These values can be entered manually; however, some are entered by the system after processes are run as described in the table below.

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

Post Value	Meaning	How Set
New ID Add	The system was unable to find a match in the database and will add a record with a new ID to your database when you run the search/match/post process. When set manually, means that the process identified a match and the user determined manually that no duplication exists. When the user runs the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Bio/Demo page.	Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times). Set manually.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record. When set manually, means that the process identified a match and the user determined manually that duplication exists. The system makes available the ID field on the Bio/Demo page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times). Set manually.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you may experience problems when posting the data.

Error Indicators

Last Name, Test Date, Birth Day, First Name, and **Test Component**

When a load error occurs, the load external data process selects the required values that were missing or incorrect in the load. Go to the Bio/Demo page, the Tests page, or another page is the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box. Once all of the check boxes are cleared and the component is saved, the system enters *Complete* in the Edit field.

Search/Match Results

Order Number

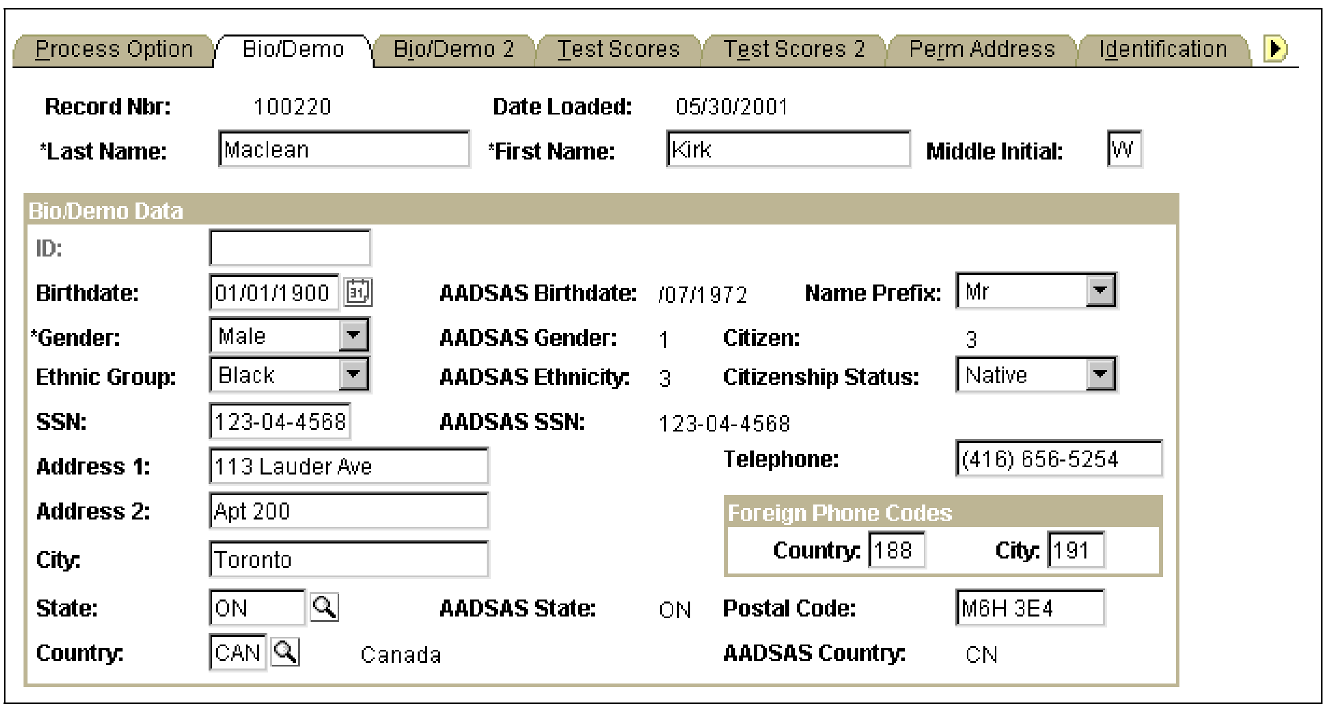
You know that the search/match/post process found a match and did not post the suspense record when the Search field contains *Perform* and displays the search order number that led to the match in the Order Number field. Use this information to decide for yourself whether or not a possible duplication exists.

Matches

Displays the number of matches the process found at order number given.

Reviewing External Test Bio/Demo Data

Access the Bio/Demo page.



Bio/Demo page (ADA_SUSP_BIO_DEMO)

Use bio/demo pages in the suspense components to review and edit biographical and demographic data loaded through the external test data load. Use this page to edit the person's last name, first name, and birth date, if the external data load omitted these values.

When the search/match/post process posts the data in the suspense record, the process posts this data to the newly created bio/demo record.

Note. If the search/match/post process finds a match and updates the existing record with the data in the suspense file, the process does not update the bio/demo data. This prevents you from overriding verified information.

Record Number The test record number.

Date Loaded The date that you loaded this record.

Last Name, First Name, and **Middle Initial** The person's last name, first name, and middle initial as they appear in the test record. If the last name or first name are empty, enter a value.

ID This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here when the process creates a new record.

If the process finds a match and updates an existing record, the process enters the ID of the record that it updated.

If the process finds a match and retains the record in the suspense table, and you decide to update an existing ID (by selecting Update ID in the Post field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.

Birthdate The person's birth date after the load process converts it to the PeopleSoft standard from the birth date reported on the test.

AADSAS Bday (AADSAS birthday) The person's birthday as it appears on the test record. This system converts this date to the PeopleSoft date standard. The converted date appears in the Birthdate field.

Name Prefix A name prefix is inserted here according to the gender from the test record and the prefix criteria you set up on the (Test) Load/Edit Parameters page.

Gender The person's gender. The load process converts the person's gender as reported in the test record to the corresponding PeopleSoft gender code.

AADSAS Gender The person's gender as it appears on the test record. The system converts the AADSAS gender to a corresponding PeopleSoft gender code (which appears in the Gender field).

Ethnic Group The person's ethnic group. The load process converts the person's ethnicity code as reported on the test record to the corresponding PeopleSoft ethnic group. 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 require a substantial programming effort.

AADSAS Ethnicity The person's ethnicity as it appears on the test record. The system converts the AADSAS ethnicity to a corresponding PeopleSoft ethnicity group (which appears in the Ethnic Group field).

Citizen The person's citizen code as it appears on the test record.

Citizenship Status The person's citizenship status as it appears on the test record. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Alien Perm* (alien permanent), *Alien Temp* (alien temporary), *Native, Naturaliz* (naturalized), and *Not Indic* (not indicated).

SSN (social security number) — The person's social security number after the load process converts it to the PeopleSoft standard from the social security number reported on the test.

AADSAS SSN (AADSAS social security number) — The person's social security number as it appears on the test record. This system converts this social security number to the PeopleSoft social security number standard. The converted social security number appears in the SSN field.

Address 1 and **Address 2** — The person's address.

City and **Telephone** — The person's city and telephone number.

Country and **City** — The person's country and city foreign phone codes as it appears on the test record.

State and **AADSAS State** — State is translated to your code from the test state code.

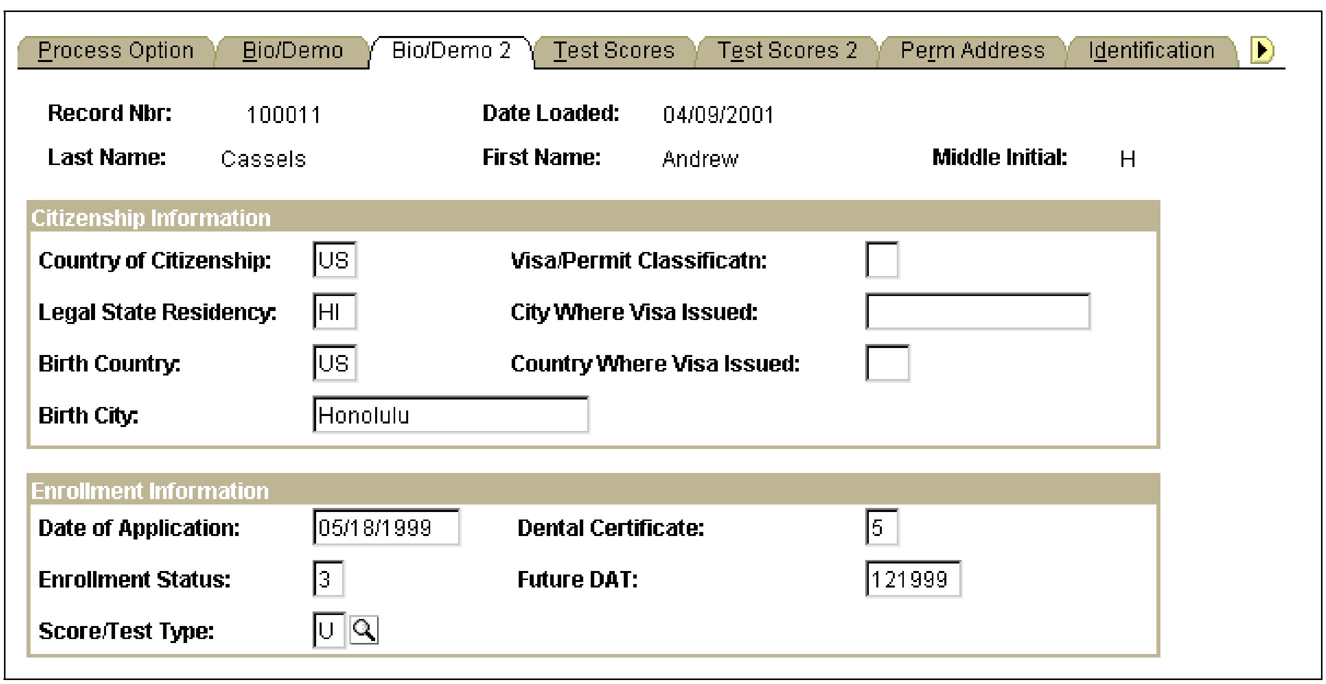
Postal — The person's postal code.

Country — The person's country of residence. The load process converts the person's country as reported in the test record to the corresponding PeopleSoft country code.

AADSAS Country — The person's country as it appears on the test record. The system converts the AADSAS country to a corresponding PeopleSoft country code (which appears in the Country field).

Reviewing Additional Bio/Demo Data

Access the Bio/Demo 2 page.

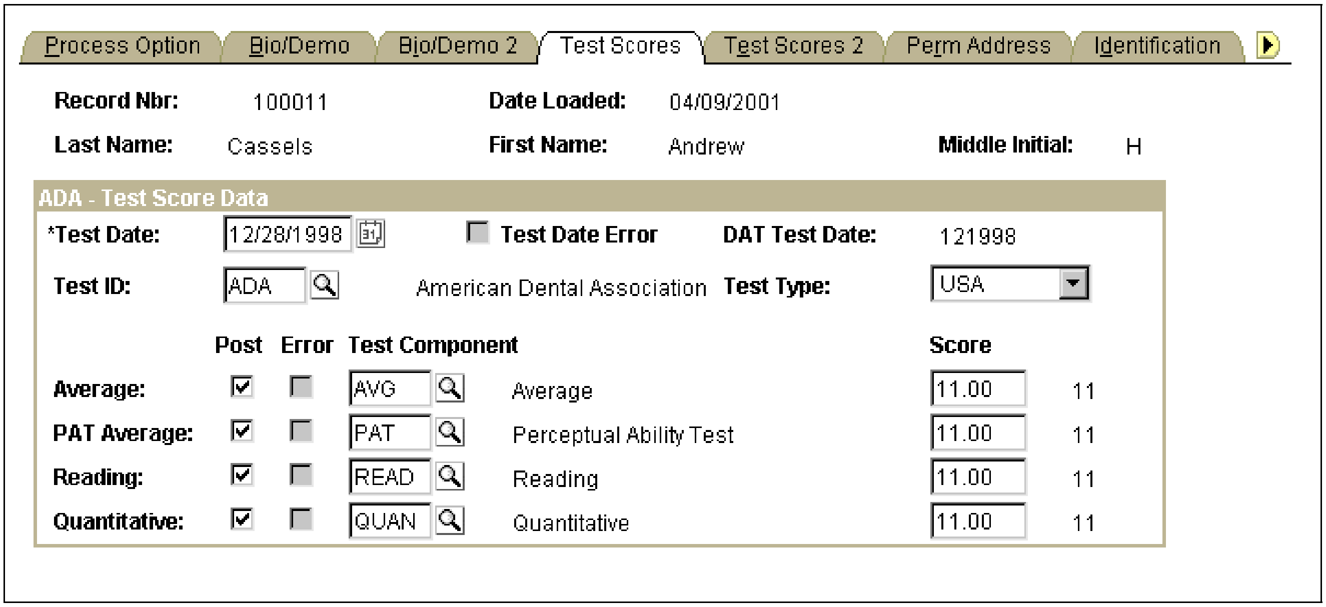


Bio/Demo 2 page (ADA_SUSP_BIO_DEMO2)

Personal data loaded from the external test data load appears on this page.

Reviewing Test Score Data

Access the Test Scores page.



Test Scores page (ADA_SUSP_TESTS)

Test Date

The day this person took the test appears. The load process converts the test date delivered with the test to the PeopleSoft format, which appears here. The search/match/post process posts the test date to your database when you run the process for this suspense record.

Test Date Error

The load process selects this check box if it encountered an error when loading the test date. You can view additional information about this error on the Test Messages page.

DAT Test Date

The test date in the format loaded from the test appears.

Test ID

Test ID is the ID of the test taken by this person. Define test IDs on the on the Test Tables page. The Test ID is entered as a parameter during the load process.

Test Type

ADA only: The test type defines the test component included in the input file. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *USA* and *Canada.*

Post

The load process selects this check box if the score and component are valid. You can post the score for this component.

Error

The load process selects this check box if it encountered an error with either the component or the score during the load process. You can view additional information about this error on the Test Messages page.

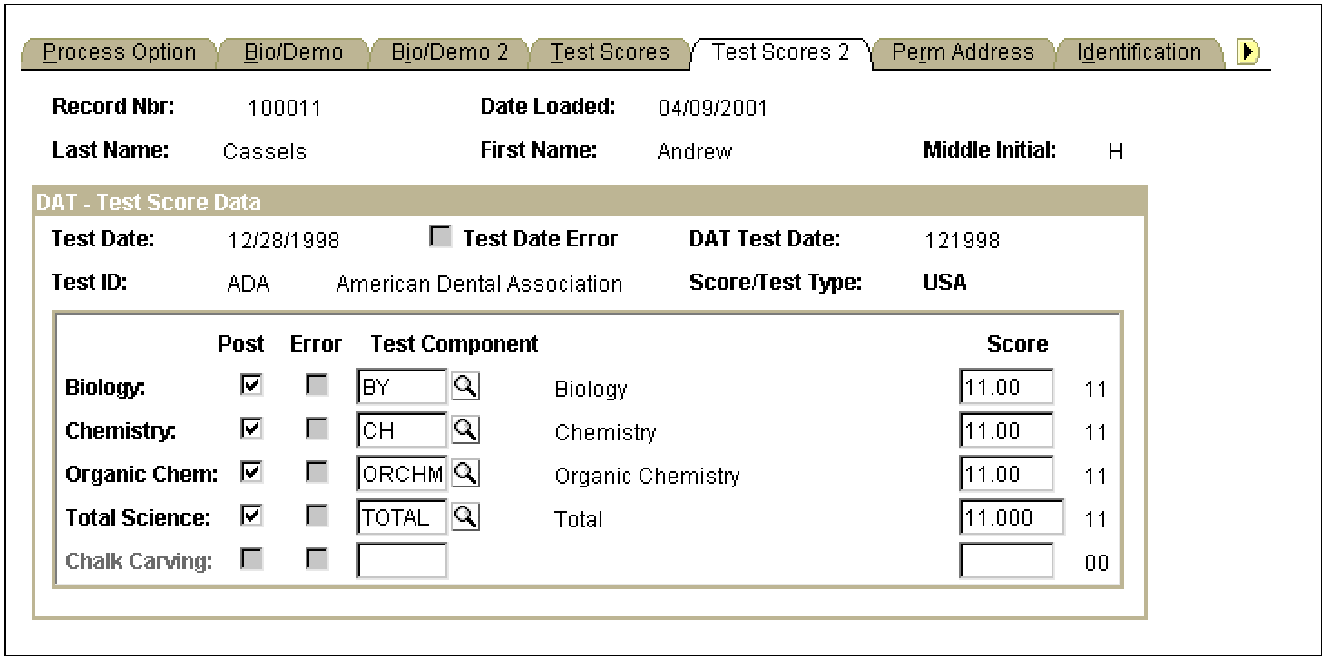
Test Component

The test components that you selected on the (Test) Test Code Parms page appear. Each test component has a corresponding score.

Score and **Percentile** The reported score and percentile appears for each component (if applicable).

Reviewing Additional Test Scores Data

Access the Test Scores 2 page.



Test Scores 2 page (ADA_SUSP_TESTS2)

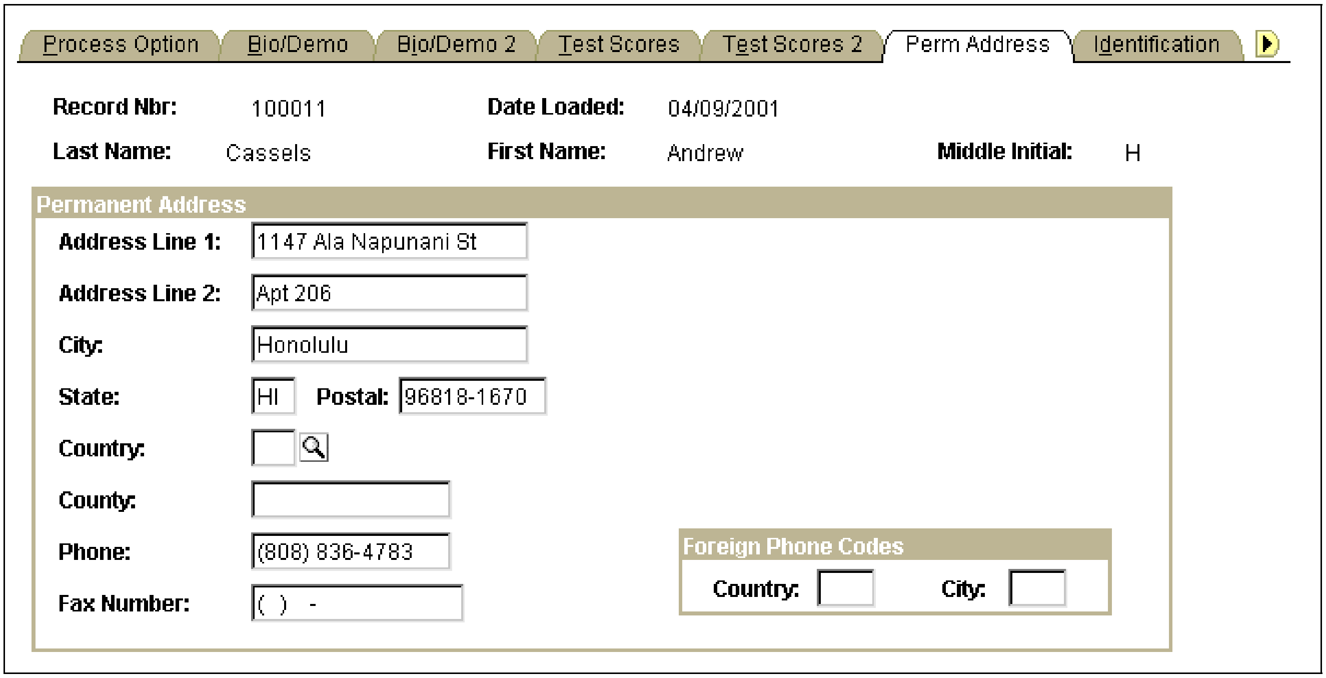
This page is identical to the Test Scores page.

See Also

Chapter 17, "Processing External Test Score Data," Reviewing Test Score Data, page 283

Reviewing Permanent Address Data

Access the Perm Address (permanent address) page.

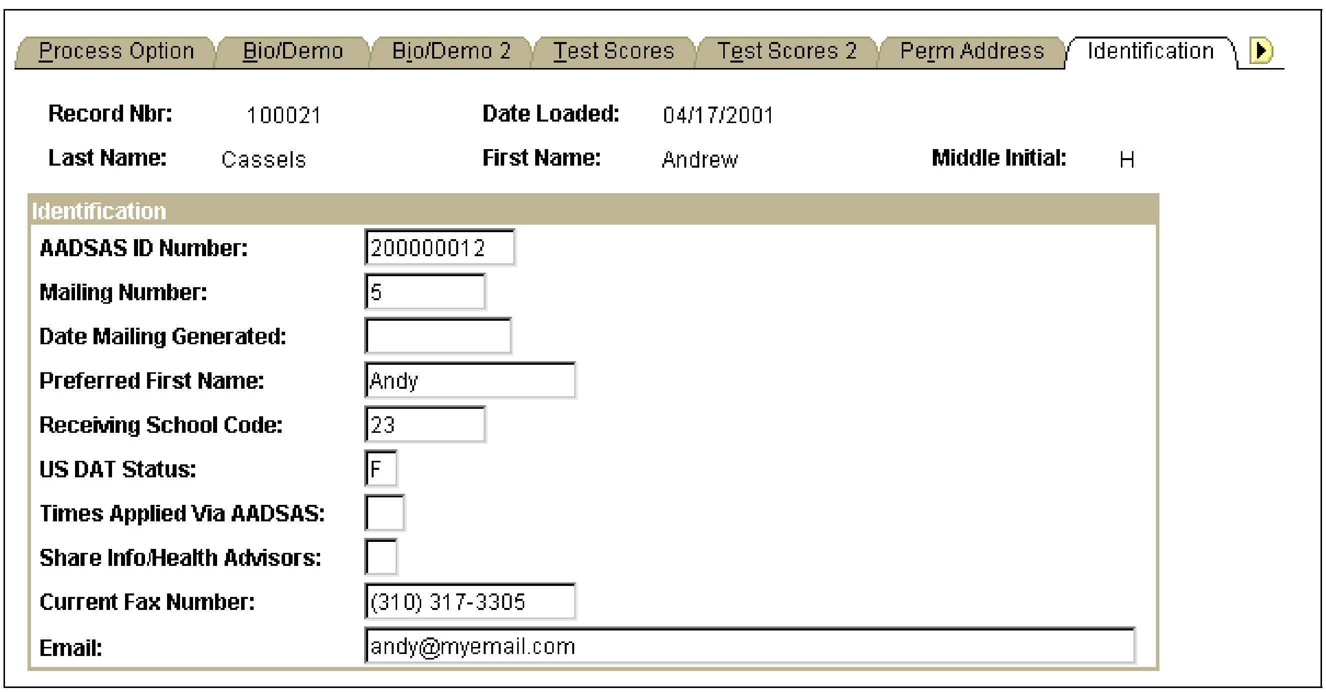


Perm Address page (ADA_SUSP_OTH_BIO)

Permanent address, phone number, and fax number data loaded from the external test data load appears on this page.

Reviewing Identification Data

Access the Identification page.

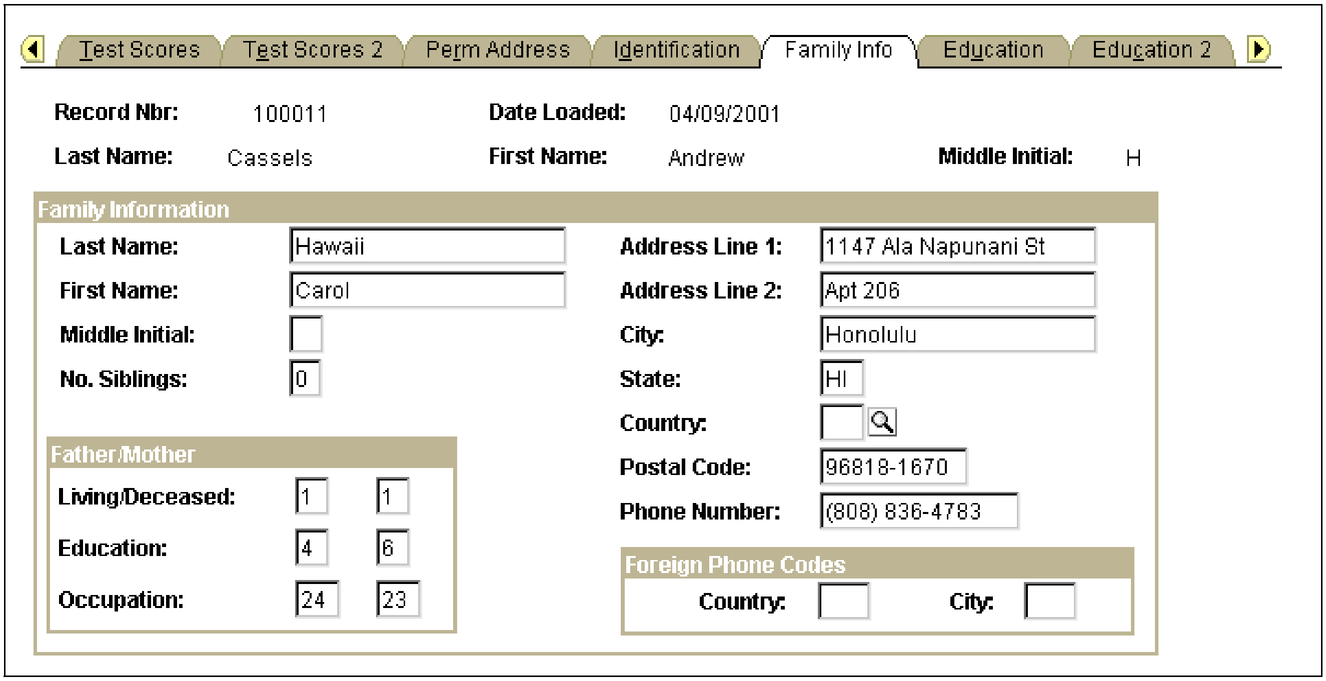


Identification page (ADA_SUSP_OTH_BIO3)

Identification data loaded from the external test data load appears on this page.

Reviewing Family Information Data

Access the Family Info (family information) page.

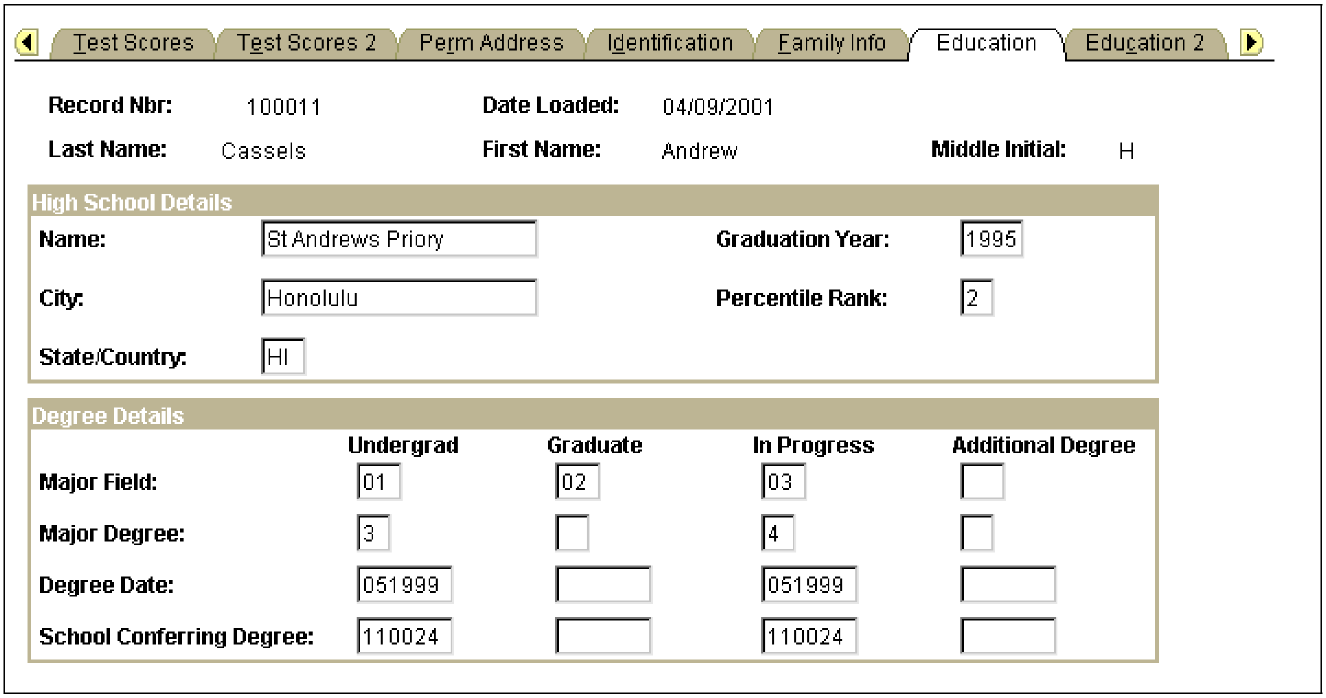


Family Info page (ADA_SUSP_OTH_BIO2)

Family information data loaded from the external test data load appears on this page.

Reviewing High School and Degree Details Data

Access the Education page.

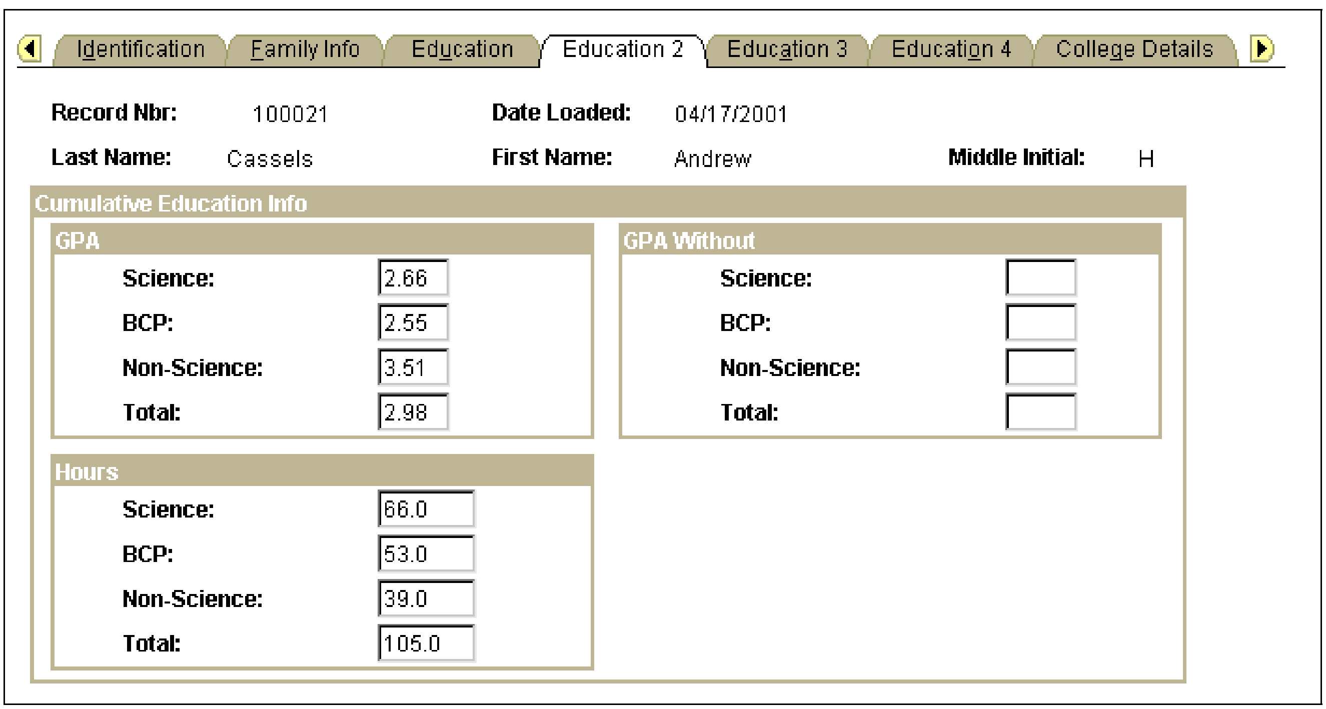


Education page (ADA_SUSP_OTH)

High school and degree detail data loaded from the external test data load appears on this page.

Reviewing Additional Cumulative Education Data

Access the Education 2 page.

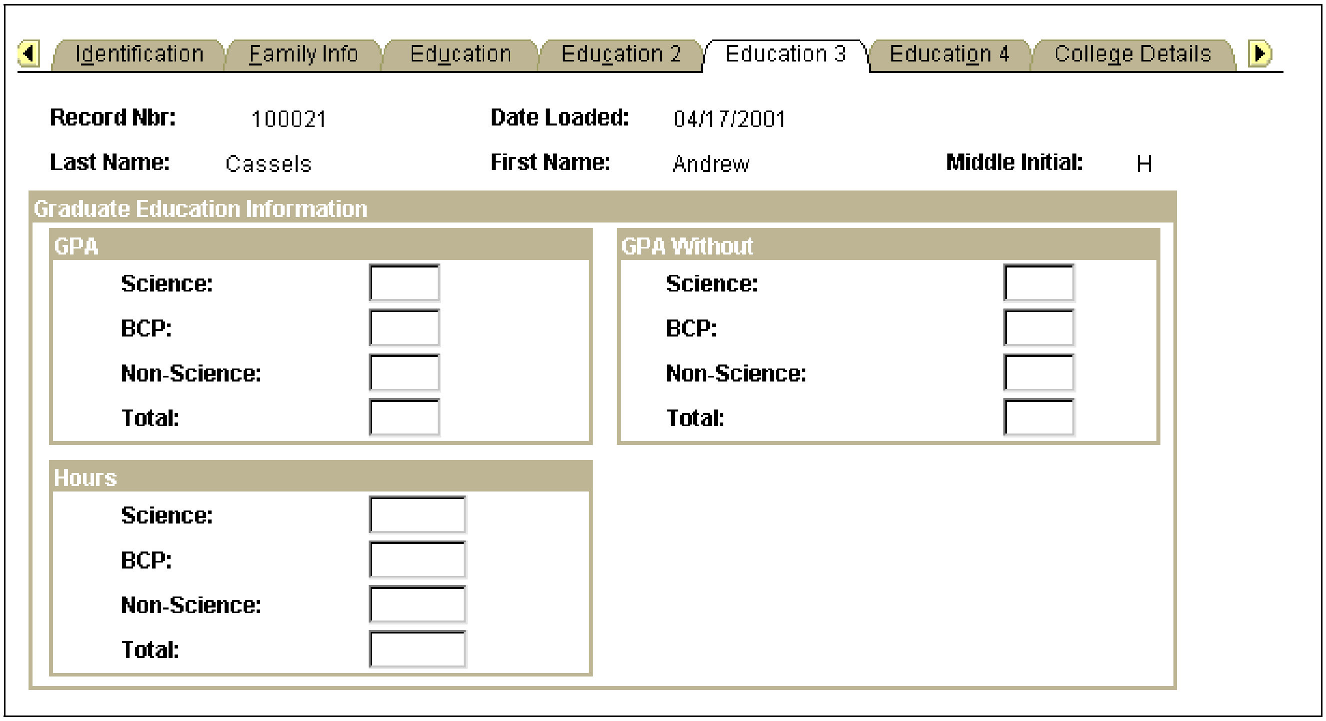


Education 2 page (ADA_SUSP_SUPPL)

Cumulative education information loaded from the external test data load appears on this page.

Reviewing Graduate Education Data

Access the Education 3 page.

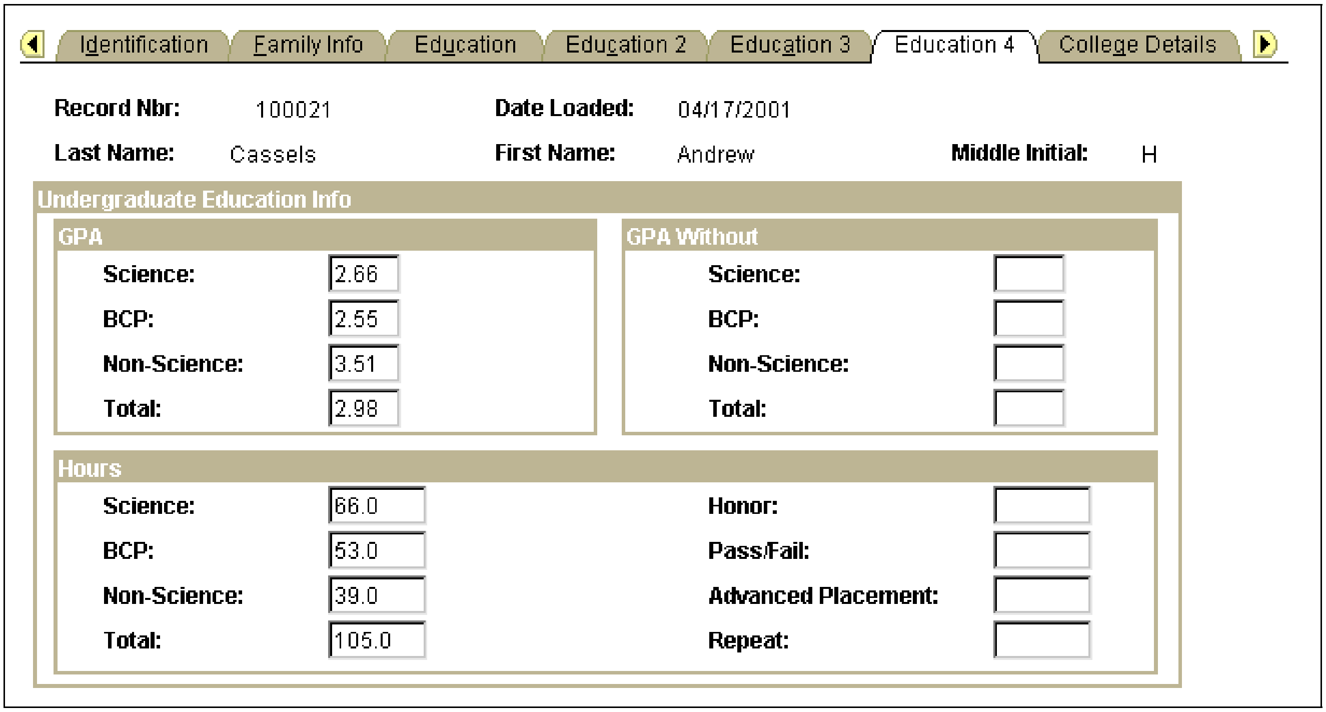


Education 3 page (ADA_SUSP_SUPPL2)

Graduate education information loaded from the external test data load appears on this page.

Reviewing Undergraduate Education Data

Access the Education 4 page.

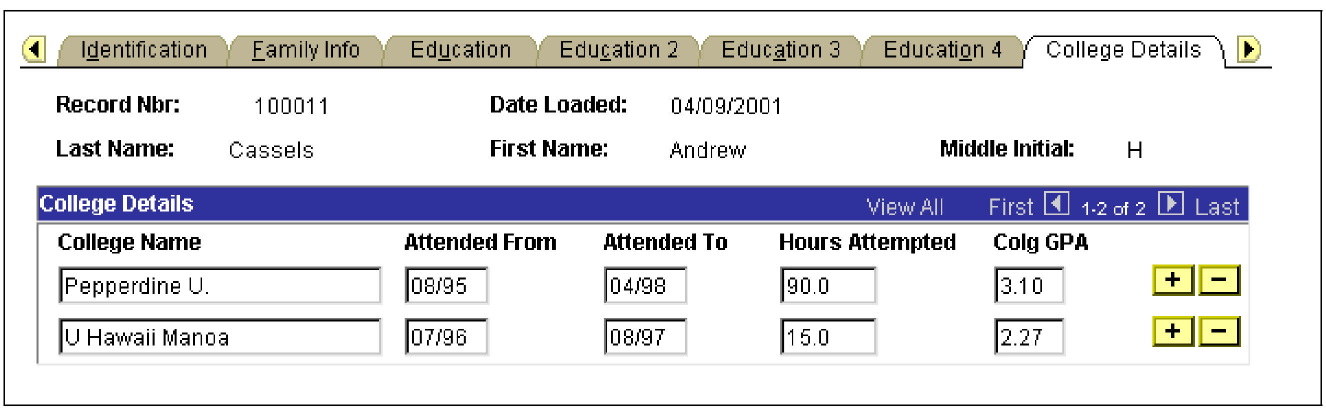


Education 4 page (ADA_SUSP_SUPPL3)

Undergraduate education information loaded from the external test data load appears on this page.

Reviewing College Detail Information

Access the College Details page.

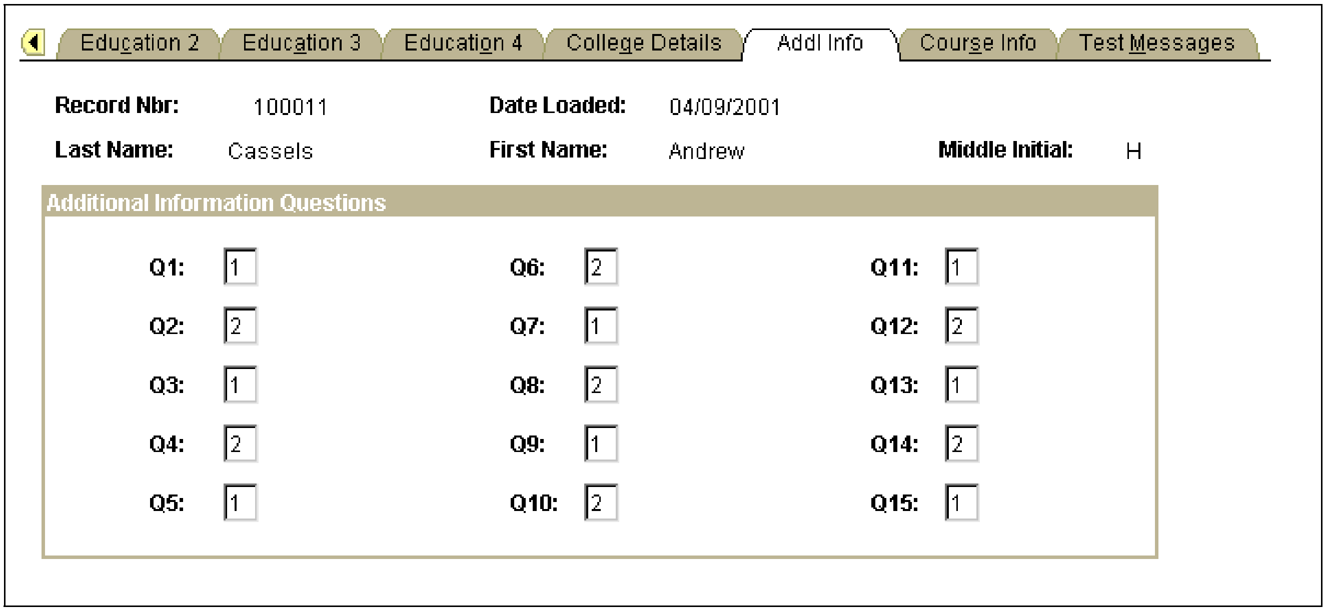


College Details page (ADA_SUSP_COL)

College detail information loaded from the external test data load appears on this page.

Reviewing Additional Question Information Data

Access the Addl Info page.

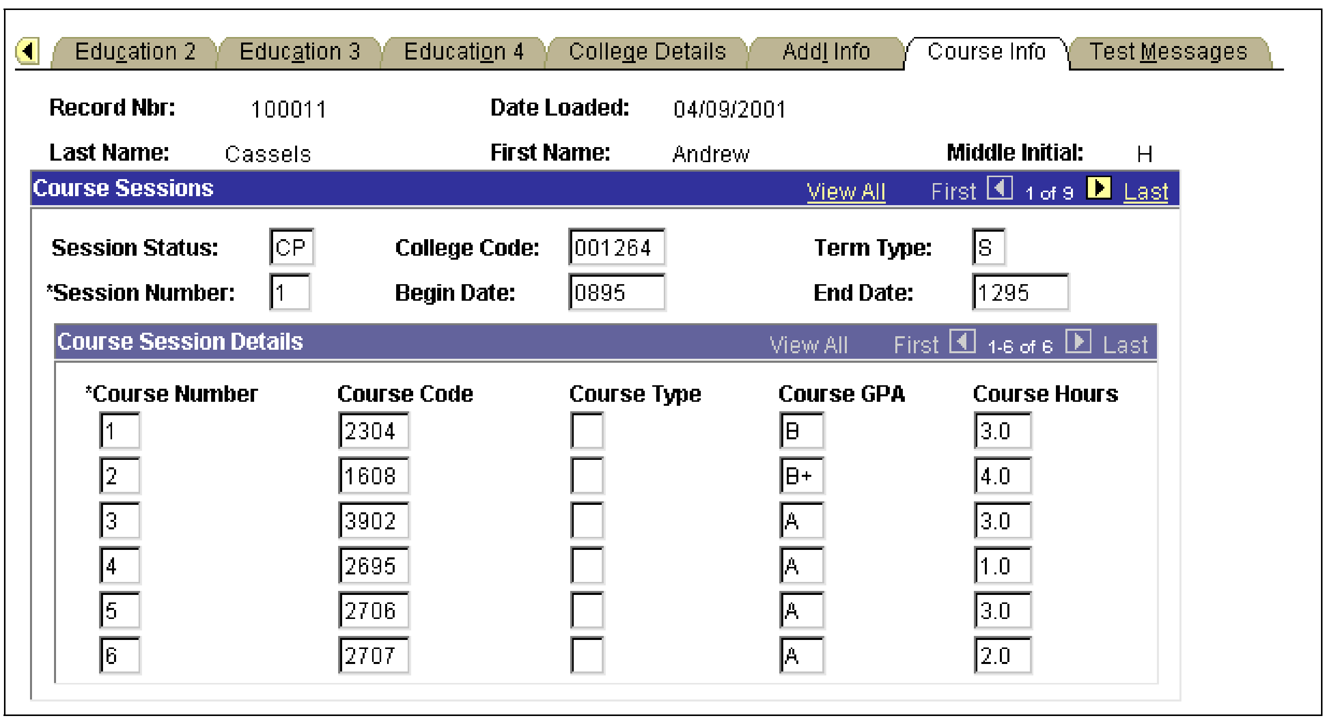


Addl Info page (ADA_SUSP_EXTRA)

Additional question information loaded from the external test data load appears on this page.

Reviewing Courses Information Data

Access the Course Info page.



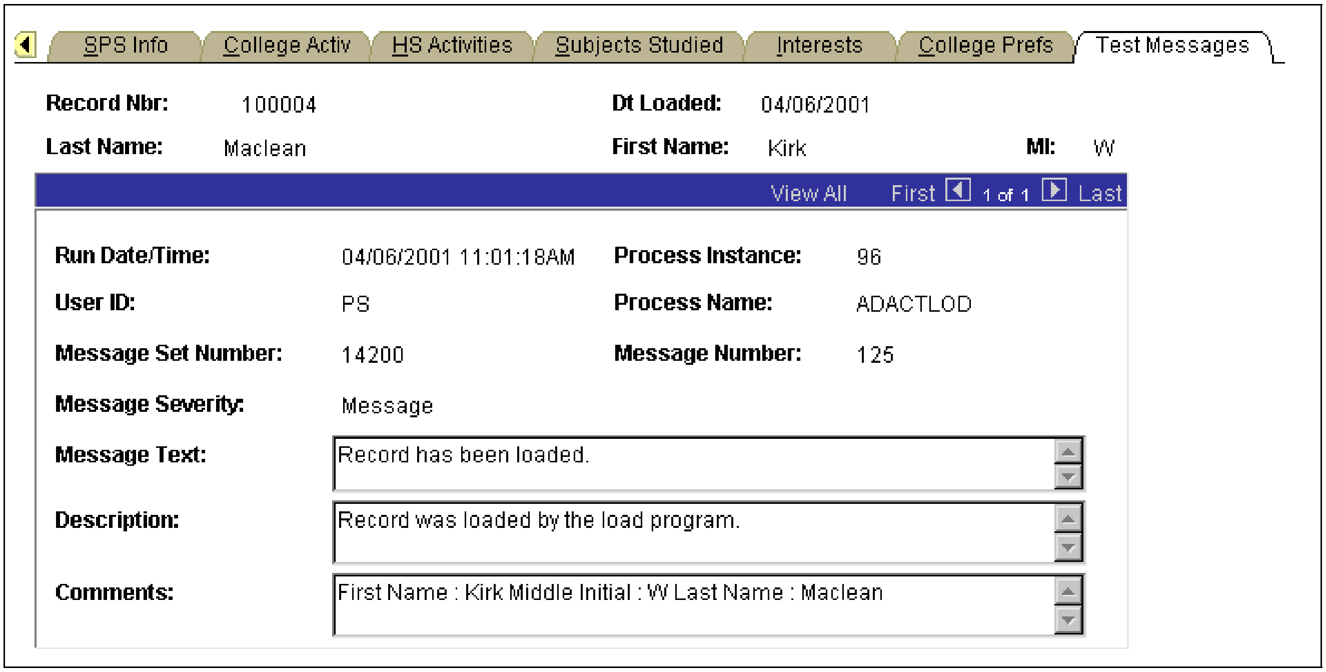
Course Info page (ADA_SUSP_COURSE)

Record Number ADA only: Displays the matching ADA record to which this course record is linked. If the field is empty, then this record is not yet linked to an ADA record.

Course session information loaded from the external test data load appears on this page.

Reviewing Test Messages in the Suspense File

Access the Test Messages page.



Test Messages page (ADA_TST_SCORE_MSG)

Any informational and error messages that external test data load and search/match/post processes generate appear on this page. You can use this page to keep current on the status of an individual's test score processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your test score processing. To do so, you would need to wait to purge your test score messages until you have completed your analysis. The system inserts a row for each process instance.

Run Date/Time	The day and time the process ran for this record.
Process Instance	The process number of the process that you ran for this record. Process Scheduler generates this number.
Operator ID	The user ID of the person who ran the process for this person.
Process Name	The name of the SQR that you ran for this record. For example, in the previous page example, the last SQR that ran was ADACTLOD, which is the ACT External Data Load process.
Message Set Number and **Message Number**	The message set number and message number. These numbers come from the message catalog.
Message Severity	The message severity, such as *Message* or *Error.*
Message Text	The message on this row of data.
Description	The detailed message.
Comments	Results or other additional information about the message.

Performing Search/Match and Posting External Data

This section provides an overview of how to perform search/match and post external data, and discusses how to:

- Post the external data.
- Set up search/match parameters for test score data.

Understanding Performing Search/Match and Posting External Data

When you run the search/match/post process, the process first performs a search based on search parameters that you set up. The purpose of the search/match is to prevent duplicate records in your database. Duplicate records are very difficult to find and delete once they have been created.

You can specify what you want the process to do when it finds a match (or multiple matches). The process can update the record in your database that matches the suspense record if you are sure that the person in your database is the same person the test data is for. For example, if the process found a matching social security number, you might be confident that this is the same person, so the process could update the record automatically. You can also define parameters that tell the process to wait on posting the record. This enables you to review the record and decide manually if it matches a record in your database. For example, you would want to check for yourself whether or not duplication exists if the only parameters that matched were name and gender.

If the search/match/post process does not find a match, and you selected the Add option for the New parameter on the Search/Match Parms page, it posts the suspense record to your database. External test load data posts to the Bio/Demo Data and Test Score components, and either the Student Profile Section or Additional Candidate Information components (depending on the test that you are processing). Once you post suspense data, you must use these components to edit the information.

You can perform the search/match and post processes separately, or you can perform them together. We recommend that you run the search/match and post processes in one step. This ensures that you process the records in the right order, which can save you a lot of confusion later on.

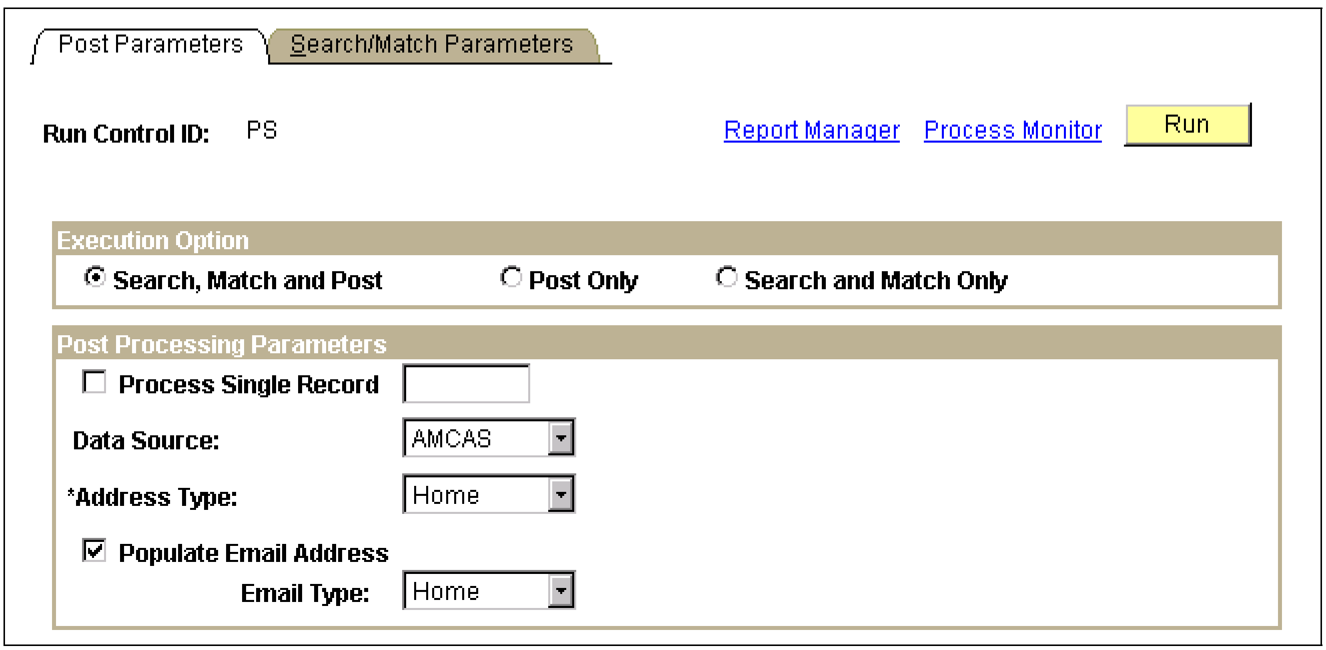
You might run the search/match/post process more than once for any given suspense record. You first run the process after you load the data and correct any errors that the load process generated. If the search/match/post process finds possible matches and retains the records in the suspense table, you must manually determine whether or not a match exists and then run the process again to process the suspense record accordingly.

Page Used to Perform Search/Match and Post External Data

Page Name	Object Name	Navigation	Usage
Post Parameters	ACT_POST_PARMS, ADA_POST_PARMS, AMCAS_POST_PARMS, AP_POST_PARMS, CRS_POST_PARMS, DAT_POST_PARMS, EOS_POST_PARMS, GMASS_POST_PARMS, GMAT_POST_PARMS, GRE_POST_PARMS, LSAC_POST_PARMS, SAT_POST_PARMS, SSS_POST_PARMS, TOEFL_POST_PARMS	Develop Enrollment, Process External Data, Proc, (Test) Search/Match/Post Scores	Post external test data from suspense files. Before you post the data, however, set up the search/match parameters on the Search/Match Parameters page. You can post a single record or all of the records in the suspense file. This page is the same for all external test score data loads.

Posting External Data

Access the Post Parameters page.



Post Parameters page (AMCAS_POST_PARMS)

Execution Option

Search, Match and Post Select this option if you want the process to search your database for records that match the suspense record *and* post the suspense data to your database. This is the recommended option.

Post Only Select this option if you only want to post the suspense data to your database (if you select this option, you should have already ran search/match).

Search and Match Only Select this option if you only want to run the search and match process on the suspense file. You will need to post the data at a later time.

Post Processing Parameters

Process Single Record Select this check box if you want to run the search/match/post process for a single suspense record. The field to the right becomes available. Select the suspense record that you want to process.

Data Source Select the data source from which this information was received. Data source is a required value on the Test Results page. The search/match/post process will post the value that you select here to the Test Results page. Values for this field are delivered with your system as translate values. You can modify these translate values.

Address Type If the search/match/post process adds a new record to your database, the process loads the address information from the test record into the Addresses page in the Bio/Demo component. Select the address type that you want the process to assign to the new address. Define address types on the Address Type Table.

Populate Email Address, Email Type Select this check box to post an email address to the EMAIL_ADDRESSES record. If you choose to populate an email address, you must then select an Email Type.

Note. This option is available only for the EOS and AMCAS Post Processes.

Setting Up Search/Match Parameters for Test Score Data

Access the Search/Match Parameters page. Use the search/match parameters pages to set up your search/match/post parameters. These are the parameters that guide the search/match/post process when it processes suspense files. This page is the same for all external test score data loads.

Select Develop Enrollment, Process External Data, Proc, (Test Name) Search/Match/Post Scores.

See Also

Chapter 15, “Performing EDI TS130 Transcript Transactions,” Setting Up Search/Match Parameters, page 235

Researching Duplicate Records

In the search dialog page of the suspense component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. Once you are in the component, find the parameters for which the process identified a match, then use Search Match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who truly matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

See Also

Chapter 17, "Processing External Test Score Data," Performing Search/Match and Posting External Data, page 292

Re-Running the Search/Match/Post Process

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Develop Enrollment, Process External Data, Use, Bio/Demo Data. To view a test score record that the search/match/post process created or updated, select Develop Enrollment, Process External Data, Use, Test Scores.

See Also

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 107

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Purging Suspense Files and Test Score Messages

This section discusses how to use the purge parameters pages to purge suspense records and test score messages, if applicable.

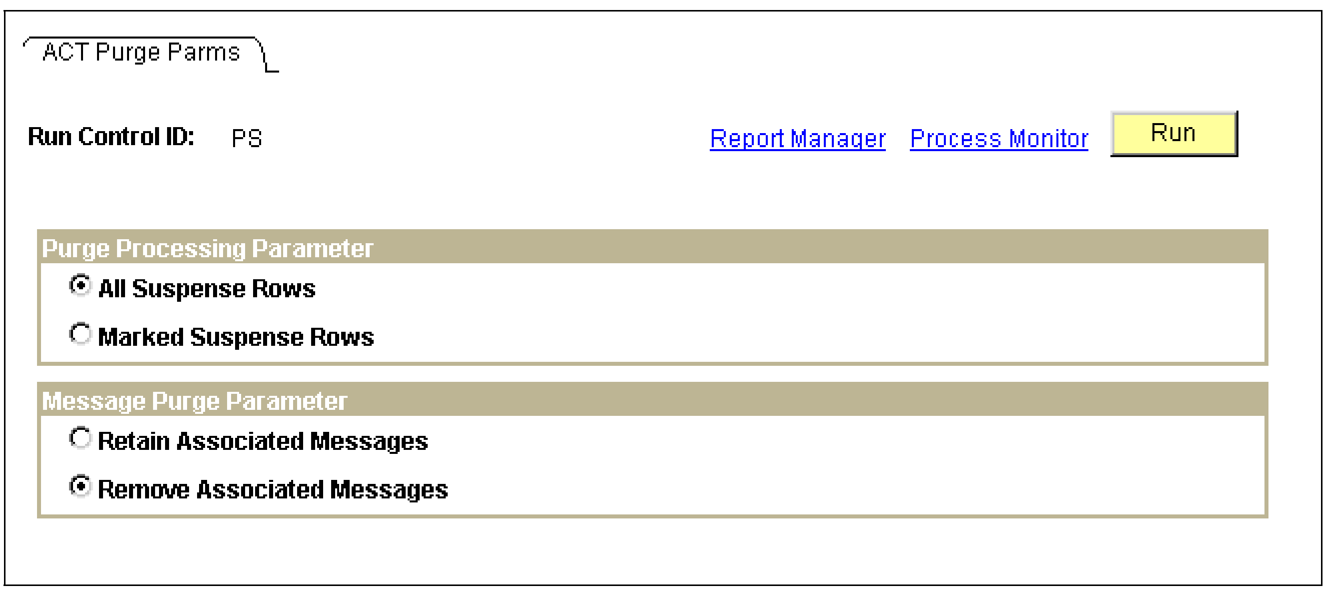
Note. If you intend to perform an analysis on your test score processing, do not purge your test score messages with this process. Instead, purge them at a later date when you know you no longer have a need to view them. This page is the same for all external test score data suspense records.

Pages Used to Purge Suspense Files and Test Score Messages

Page Name	Object Name	Navigation	Usage
(Test) Purge Parms	ACT_PURGE_PARMS, ADA_PURGE_PARMS, AMCAS_PURGE_PARMS, AP_PURGE_PARMS, CRS_PURGE_PARMS, DAT_PURGE_PARMS, EOS_PURGE_PARMS , GMASS_PURGE_PARMS , GMAT_PURGE_PARMS, GRE_PURGE_PARMS, LSAC_PURGE_PARMS, SAT_PURGE_PARMS, SSS_PURGE_PARMS, TOEFL_PURGE_PARMS	Develop Enrollment, Process External Data, Proc, (Test) Purge Suspense File	Purge suspense records and test score messages, if applicable.
All Messages Purge	TST_SCORE_PARMS	Develop Enrollment, Process External Data, Proc S-Z, Test Score Messages Purge, All Messages Purge	Purge all test score messages. You can run a process to purge all test scores remaining in your suspense files for all external test score data loads.

Using the Purge Parms Page

Access the (Test) Purge Parms page.



ACT Purge Parms page (ACT_PURGE_PARMS)

All Suspense Rows Select this option if you want to purge all of the records in your suspense table, regardless of the status of the Post field on the Process Options page.

Marked Suspense Rows	Select this option if you only want to purge those records in your suspense file marked *Purge* in the Post field on the Process Options page. Select this option if you suspect that there are still suspense records that need to be processed. The purge process will only delete suspense records with *Purge* in the Post field on the Process Options page.
Retain Associated Messages	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
Remove Associated Messages	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

See Also

Chapter 17, "Processing External Test Score Data," Purging Suspense Files and Test Score Messages, page 295

Reviewing Additional External Test Data

This section provides an overview of additional external test data and discusses how to review the following additional external test data:

- Personal information.
- General information.
- Additional general information.
- High school activity information.
- College activity information.
- Subjects studied information.
- Interest information.
- College preferences information.

Understanding Reviewing Additional External Test Data Information

The search/match/post process posts additional candidate information or student profile section data (according to the test) to the (Test) Addl Candidate Info or (Test) Student Profile Section component. These components are informational only. The data in these components does not affect other data in your database. For example, if you change a person's name in these components, it would not change the name anywhere else in the system. In other words, these components are not connected to any tables in your database other than the additional candidate and student profile section tables.

Many of the values and codes that appear in the Additional Candidate Information and Student Profile Section components are based on values and codes that the testing agency in question defines. Therefore, please contact the testing agency that manages the test with which you are concerned for full descriptions of the data that appears in these pages.

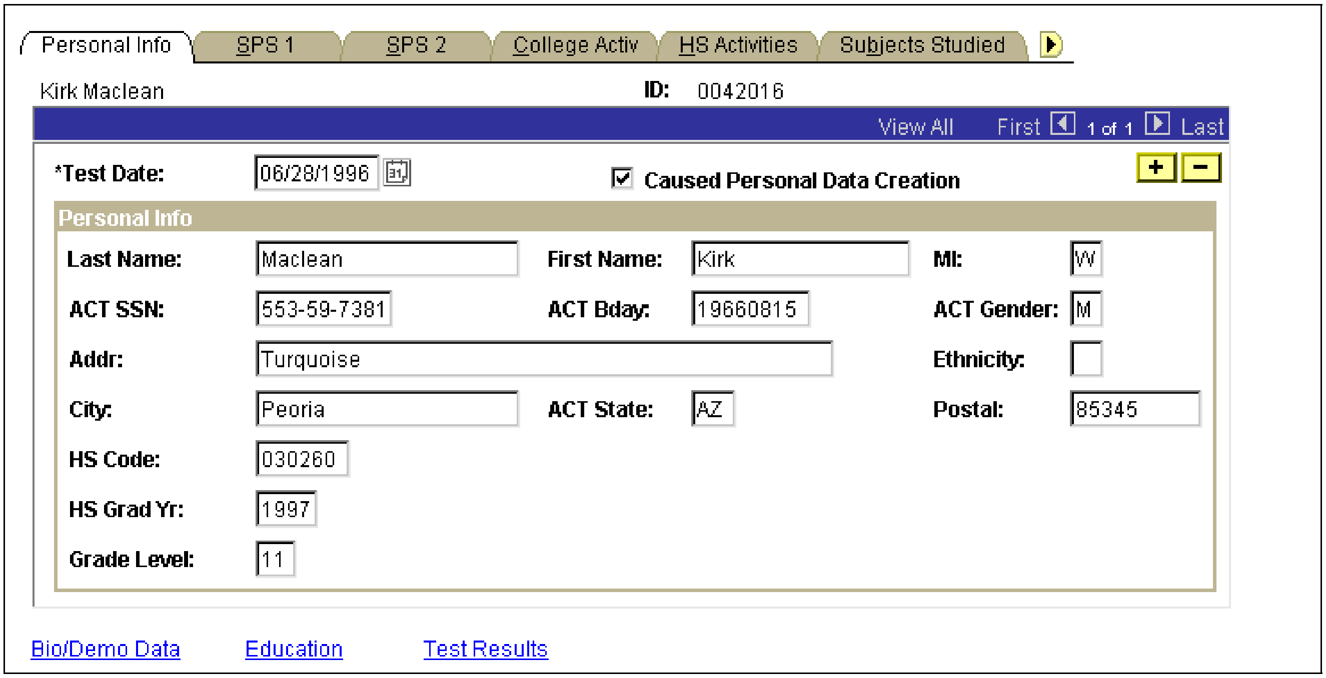
The following pages comprise an example of one particular student profile section data component (ACT). Student profile and additional candidate information components work the same way. To access the additional candidate or student profile section components for a particular test, select Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information.

Pages Used to Review Additional External Test Data Information

Page Name	Object Name	Navigation	Usage
Personal Info (personal information)	ACT_SPS_PERS, MCAT_ACI_PERS	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access student profile personal information. Demographic information appears on this page from the suspense record Bio/Demo page. This page also indicates if the post process created a personal record for this person.
SPS 1	ACT_SPS	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access student profile general information.
SPS 2	ACT_SPS_BIO_DEMO2	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access additional student profile general information.
HS Activities (high school activities)	ACT_SPS_HS	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access student profile high school activity information.
College Activ (college activities)	ACT_SPS_COL	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access student profile college activity information.
Subjects Studied	ACT_SPS_STUDY	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access student profile subjects studied information.
Interests	ACT_SPS_INTERESTS	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access student profile interest information.
College Prefs (college preferences)	ACT_SPS_COL_PREFS	Develop Enrollment, Process External Data, Use, (Test) Student Profile Section or (Test) Additional Candidate Information	Access student profile college preferences information.

Reviewing Student Profile Personal Information

Access the Personal Info page.



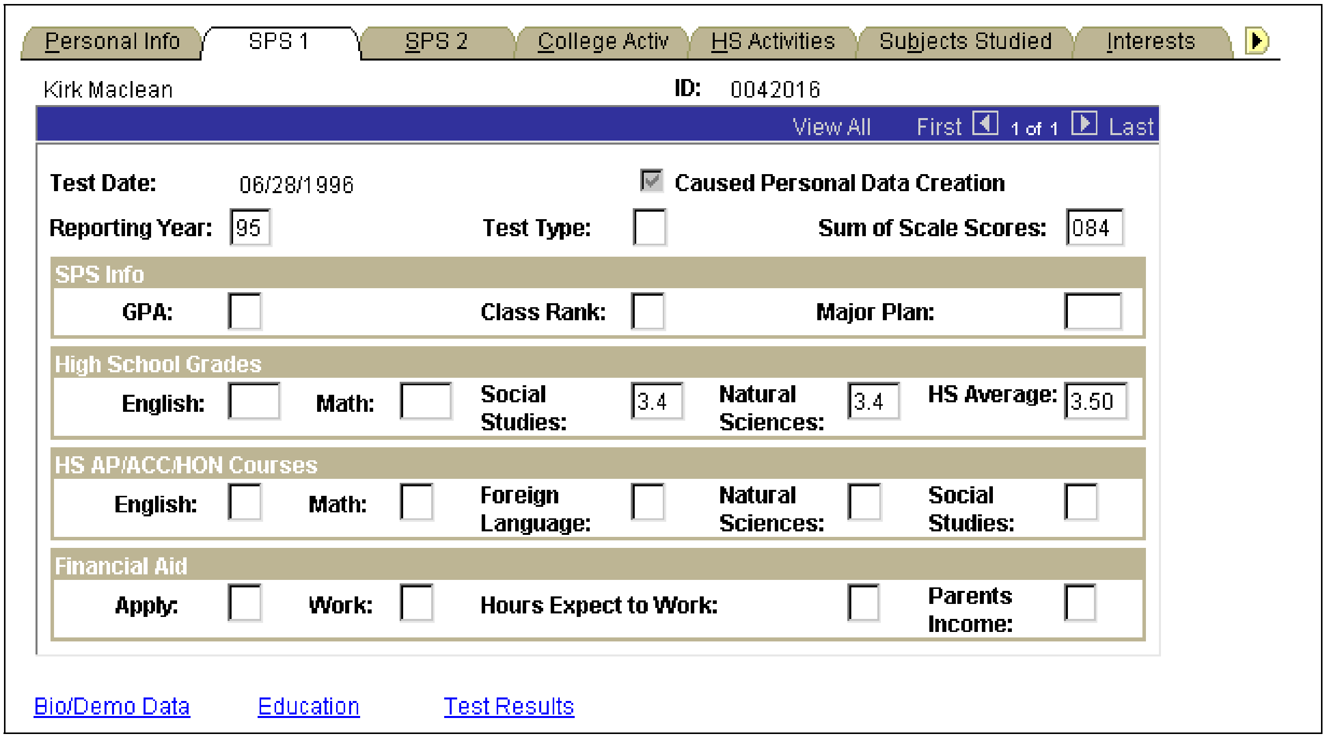
Personal Info page (ACT_SPS_PERS)

Personal data posted from the Bio/Demo page appears in these fields.

Test Date	The day the person took the test.
Caused Personal Data Creation	Indicates whether or not the process added a new ID to your database.

Reviewing Student Profile Section General Information

Access the SPS 1 page.

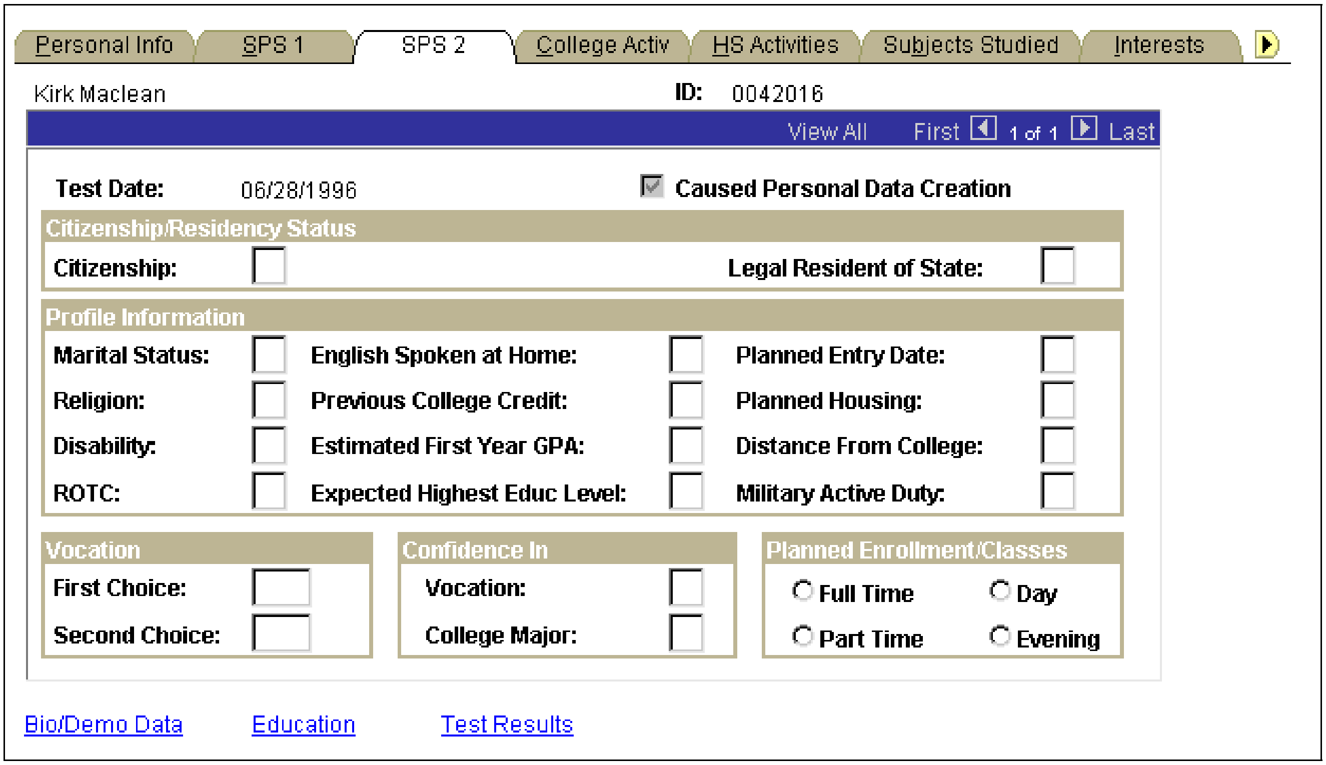


SPS 1 page (ACT_SPS)

General information data posted from the suspense record appears in these fields.

Reviewing Student Profile Section Additional General Information

Access the SPS 2 page.

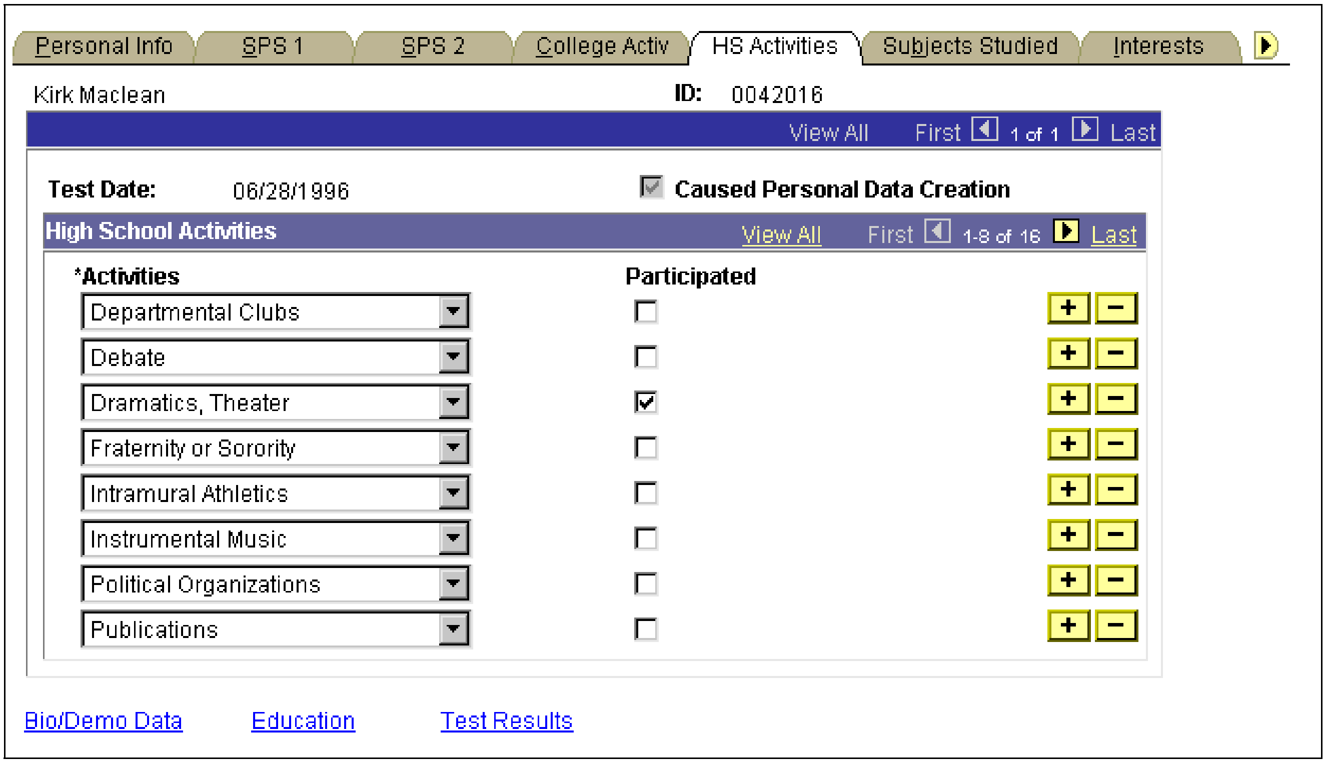


SPS 2 page (ACT_SPS_BIO_DEMO2)

General information data posted from the suspense record appears in these fields.

Reviewing Student Profile High School Activity Information

Access the HS Activities (high school activities) page.

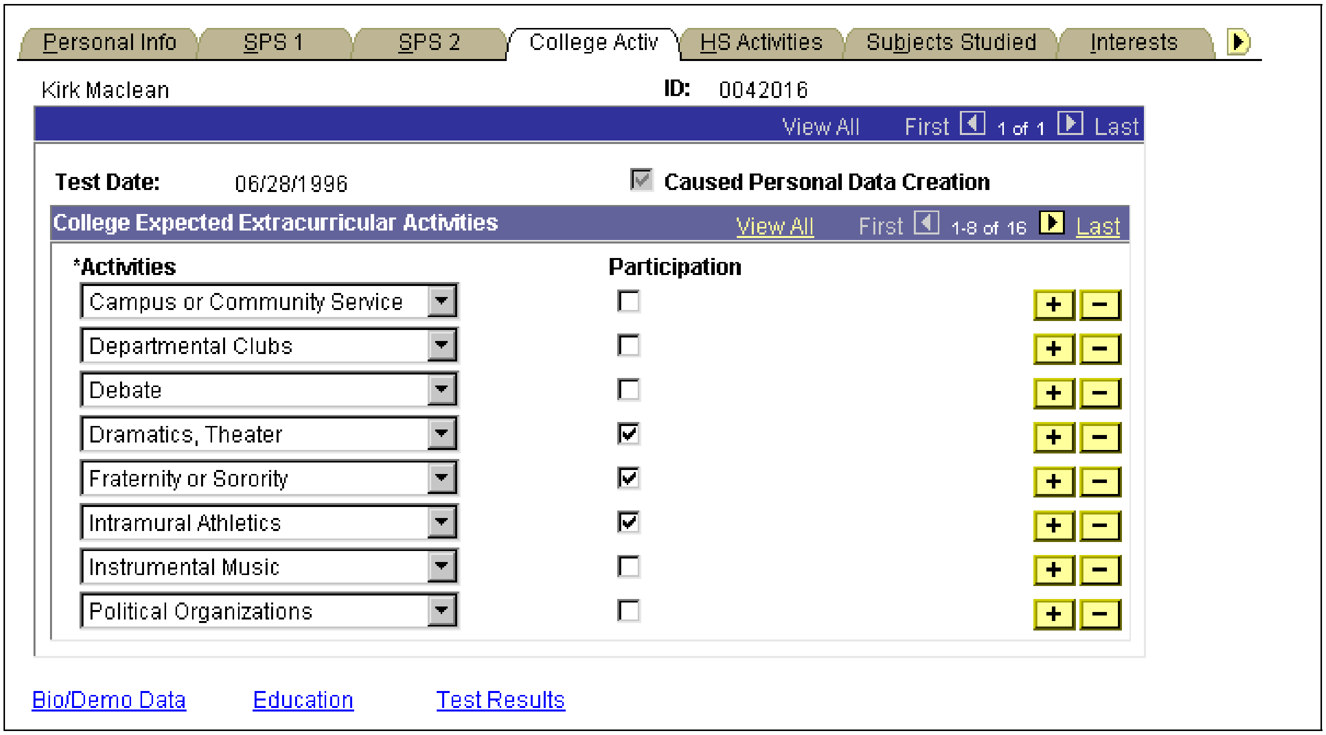


HS Activities page (ACT_SPS_COL)

High school activities data posted from the suspense record appears on this page.

Reviewing Student Profile College Activity Information

Access the College Activ (college activities) page.

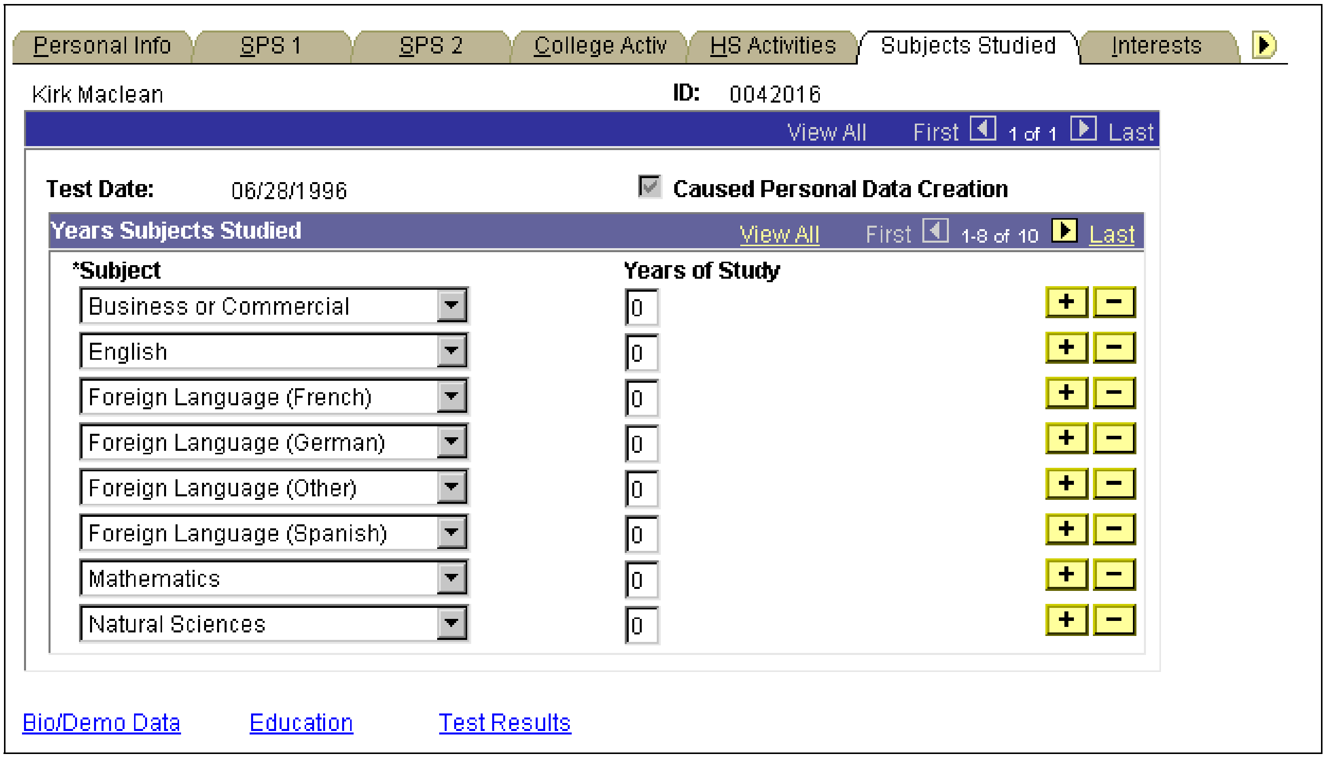


College Activ page (ACT_SPS_HS)

College activities data posted from the suspense record appear on this page.

Reviewing Student Profile Subjects Studied Information

Access the Subjects Studied page.



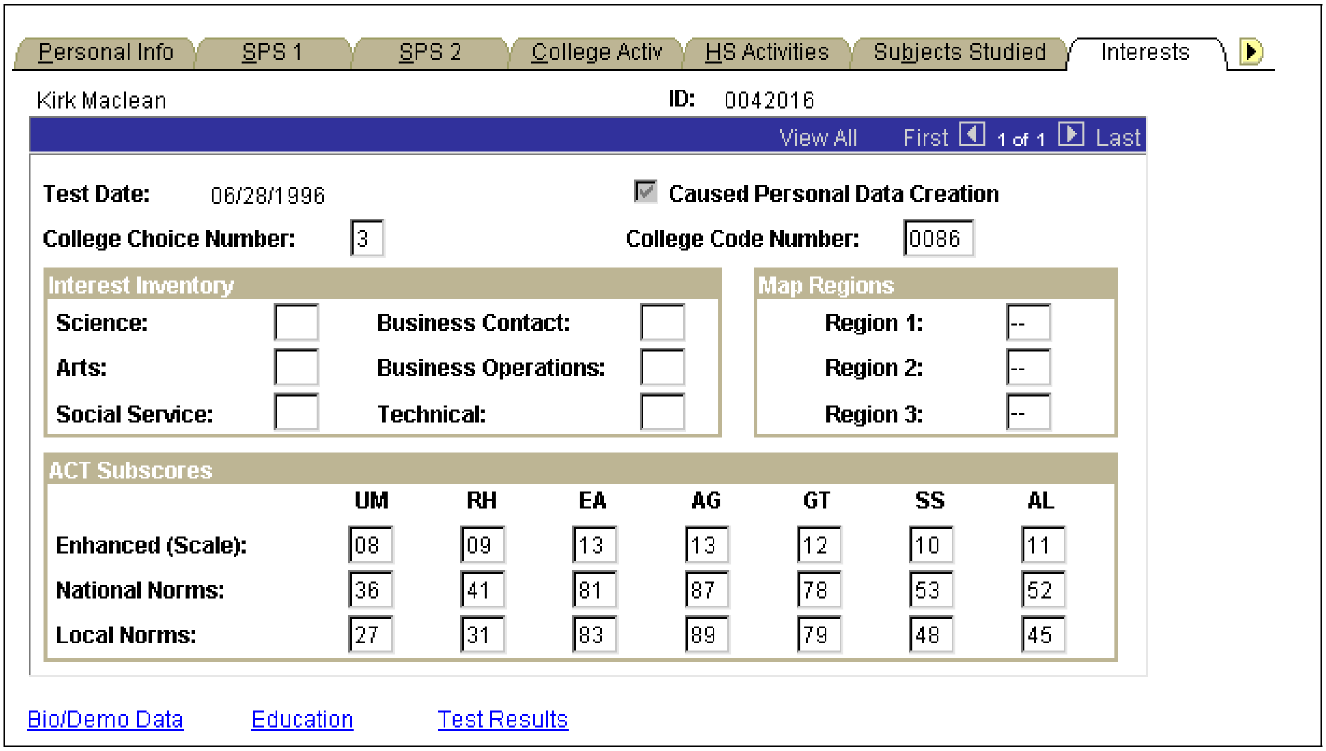
Subjects Studied page (ACT_SPS_STUDY)

Subject The posting process selects the subjects that the person selected in the student profile section as a subject he or she has studied.

Years of Study The posting process displays the number of years that the person indicated that he or she has studied this subject.

Reviewing Student Profile Section Interest Information

Access the Interests page.

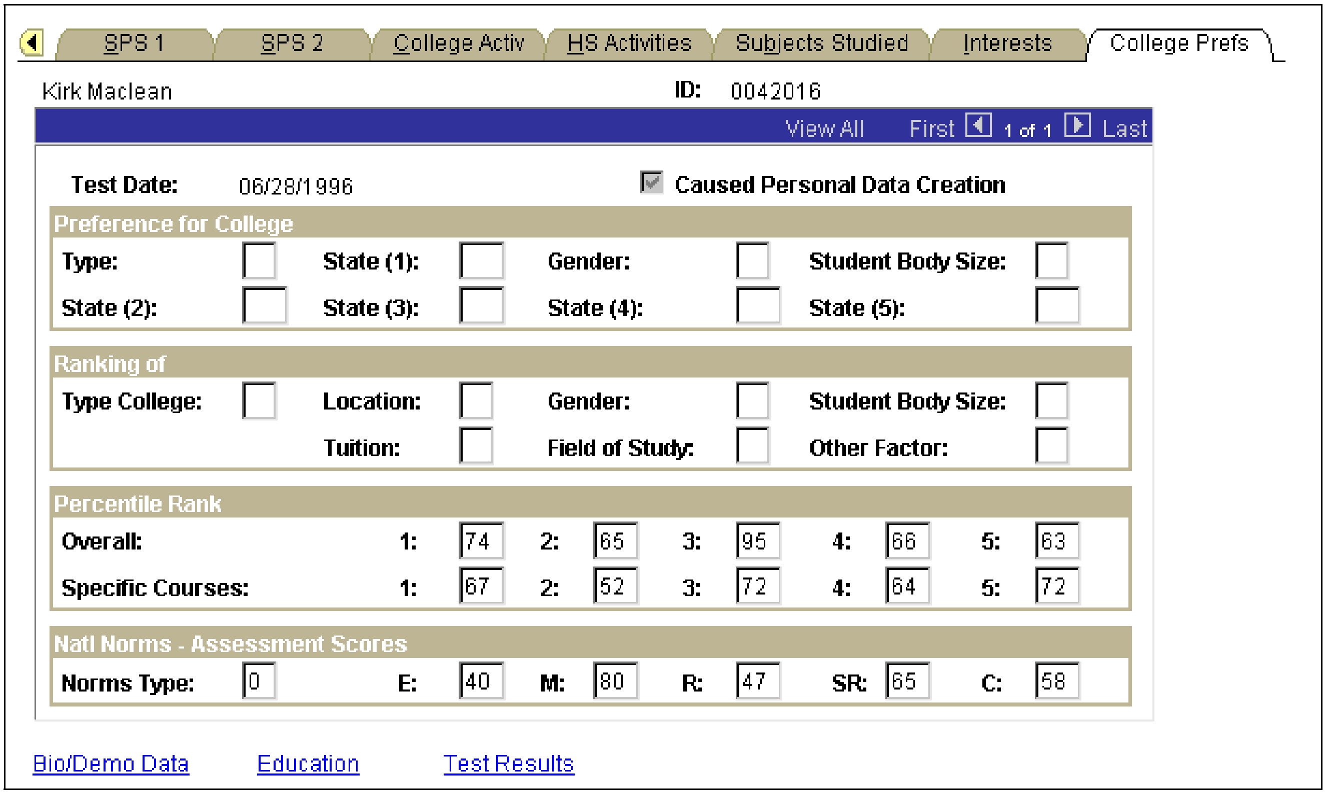


Interests page (ACT_SPS_INTERESTS)

Interest data posted from the suspense record appears on this page.

Reviewing Student Profile College Preferences Information

Access the College Prefs (college preferences) page.



College Prefs page (ACT_SPS_COL_PREFS)

College preferences data posted from the suspense record appear on this page.

Creating an Application from ADA, AMCAS, or LAW Test Data

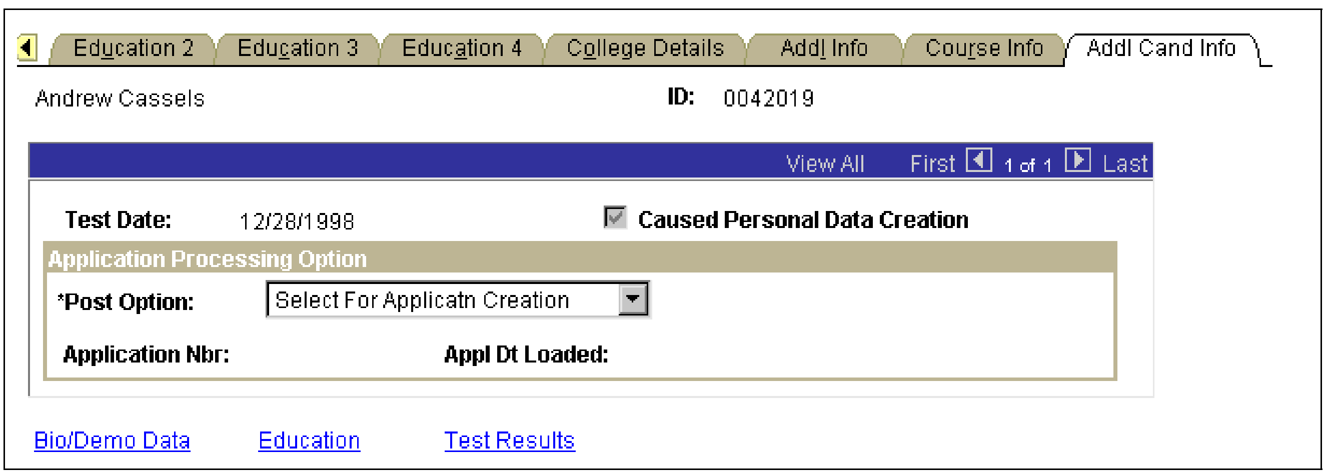
This section discusses how to use the Addl Cand Info (additional candidate information) page to specify whether or not you want to create an application for this person based on this test score data. This page applies only to the ADA, AMCAS, and LAW Additional Candidate Information components.

Pages Used to Create an Application from ADA, AMCAS, or LAW Test Data

Page Name	Object Name	Navigation	Usage
Addl Cand Info (additional candidate information)	ADA_ACI_ADM_APPL	Develop Enrollment, Process External Data, Use, ADA Addl Candidate Info	Specify whether or not you want to create an application for this person based on this test score data.
Addl Cand Info (additional candidate information)	AMCAS_ACI_ADM_APPL	Develop Enrollment, Process External Data, Use, AMCAS Addl Candidate Info	Specify whether or not you want to create an application for this person based on this test score data.
Addl Cand Info (additional candidate information)	LSAC_ACI_ADM_APPL	Develop Enrollment, Process External Data, Use, LAW Addl Candidate Info	Specify whether or not you want to create an application for this person based on this test score data.

Creating an Application from ADA Test Data

Access the Addl Cand Info page.



Addl Cand Info page

Post Option

Specify whether or not you want to create an application for this person based on this test score data. The Create Application Via Test Score Data process also updates this field.

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

Created Application: The Create Application Via Test Score Data process enters this value after it creates an application for this person.

Do Not Use For Appl Creation: Select this value if you *do not* want the Create Application Via Test Score Data process to create an application for this person.

Duplicate Application: The Create Application Via Test Score Data process enters this value if an application for this person already exists.

Select For Applicatn Creation: Select this value if you *do* want the Create Application Via Test Score Data process to create an application for this person. This is the default.

Note. The Create Application Via Test Score Data process creates an application for the ID assigned to this additional candidate information record. The process does not transfer data from the Additional Candidate Information component to the application.

See Also

Chapter 14, "Adding and Updating Applications," Loading Applications from External Test Score Data, page 185

Viewing Test Score Messages Summary Information

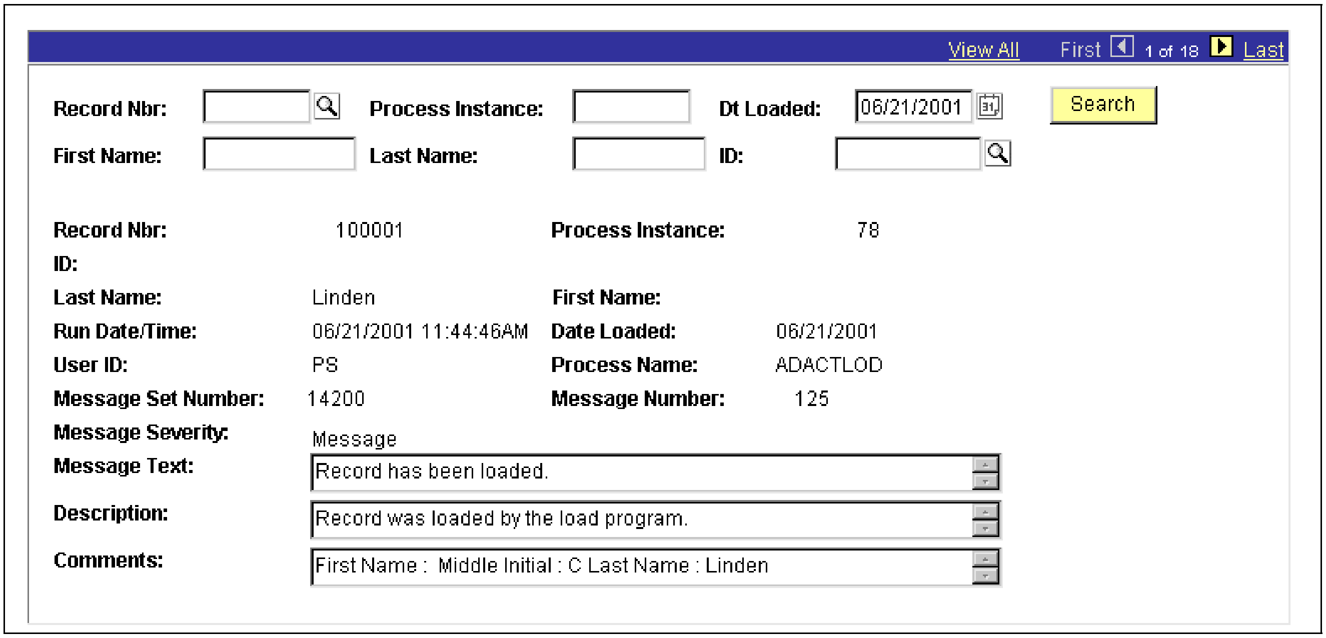
This section discusses how to use the All Test Score Messages page to view a list of all test score messages stored in your suspense files for any record loaded through an external test score data load.

Page Used to Viewing Test Score Messages Summary Information

Page Name	Object Name	Navigation	Usage
All Test Score Messages	TST_SCORE_MSG_TBL	Develop Enrollment, Process External Data, Inquire, Test Score Messages, All Test Score Messages	View a list of all test score messages stored in your suspense files for any record loaded through an external test score data load.

Viewing Test Score Messages Summary Information

Access the All Test Score Messages page.



All Test Score Messages page

Record Nbr (record number)	Select the record number for which you want to search for test score messages.
First Name	Select the first name for which you want to search for test score messages.
Process Instance	Select the process instance for which you want to search for test score messages.
Last Name	Select the last name for which you want to search for test score messages.
Dt Loaded (date loaded)	Select the date loaded for which you want to search for test score messages.
ID	Select the ID for which you want to search for test score messages.
Search	Click the Search button to bring up information matching your search criteria.

CHAPTER 18

Receiving External Applications from OUAC

This chapter provides an overview of external; applications from OUAC and discusses how to:

- Pre-load OUAC data.
- Load OUAC data through the EDI Manager.
- Load additional data through an SQR process.
- Review and edit OUAC transaction A/U staging tables.
- Review and edit OUAC transaction B5 staging tables.
- Review and edit OUAC transaction B/V-E staging tables.
- Review and edit OUAC transaction F staging tables.
- Review and edit OUAC transaction G/H staging tables.
- Review and edit OUAC transaction J/N staging tables.
- Review and edit OUAC transaction P/R staging tables.
- Review and edit OUAC transaction T staging tables.
- View search/match and OUAC processing statuses.
- Post OUAC transaction data.
- View OUAC messages.
- Review overflow OUAC application information.

Understanding External Applications from OUAC

Universities in Ontario, Canada use the Ontario Universities Application Center (OUAC) throughout their undergraduate admissions process. The OUAC collects much of the undergraduate admissions data from various sources and electronically transmits the data to institutions in Ontario.

PeopleSoft developed the OUAC interface using EDI Manager. This tool enables you to load data that you receive electronically from OUAC into your PeopleSoft application. The system posts personal data, application data, academic history, and testing information to core tables in your database.

To process OUAC transactions, you first run a pre-load process that prepares the OUAC file for EDI. Then you load the data from the OUAC file into staging tables in your application. While the data is in the staging tables you can view and edit the data. When you are ready, you post the data to tables in your application.

The OUAC defines the fields on these pages. Please refer to the *OUAC Systems Manual* for explanations of the individual fields on each page.

Pre-Loading OUAC Data

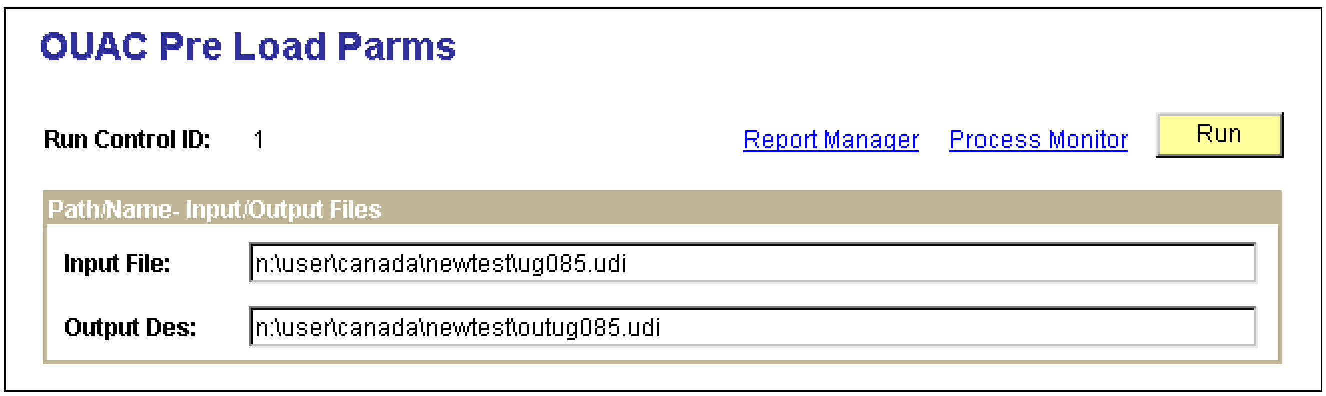
This section discusses how to pre-load OUAC data.

Page Used to Pre-Load OUAC Data

Page Name	Object Name	Navigation	Usage
OUAC Pre Load Parms (OUAC pre load parameters)	OUAC_PRELOAD_PARMS	Develop Enrollment, Process External Data, Proc G-R, OUAC Pre Load Process, OUAC Pre Load Parms	Prepare the OUAC file for EDI. The OUAC pre load process adds control records to transaction groups and sends them to the output file.

Using the OUAC Pre Load Parms Page

Access the OUAC Pre Load Parms (OUAC pre load parameters) page.



OUAC Pre Load Parms page

Input File Enter the full path and name of the OUAC file that you want to process.

Output Des (output description) Enter the full path and name of the output file.

Click the Run button to run the OUAC pre load process at user-defined intervals.

Loading the OUAC Data Through the EDI Manager

Use the Inbound EDI Agent − Run Control Parameters page to load the OUAC data through EDI Manager. The Inbound EC Agent process (ECIN0001) translates the values in the flat file created by the OUAC pre-load process and loads them into staging tables. Set the run option parameter to single file and the force profile parameter to do not force.

See Also

PeopleSoft PeopleTools PeopleBooks

Loading Additional Data Through an SQR Process

This section discusses how to load additional data through an SQR process.

Page Used to Load Additional Data Through an SQR Process

Page Name	Object Name	Navigation	Usage
OUAC Load	PRCSRUNCNTL_AD_OL	Develop Enrollment, Process External Data, Proc G-R, OUAC Load Process	Translate OUAC data that EDI Manager is not equipped to handle (such as dates that are in YYMM format, name fields that need to be converted to the PeopleSoft format, and other character fields that need to be converted to mixed case).

Reviewing and Editing the OUAC Transaction A/U Staging Tables

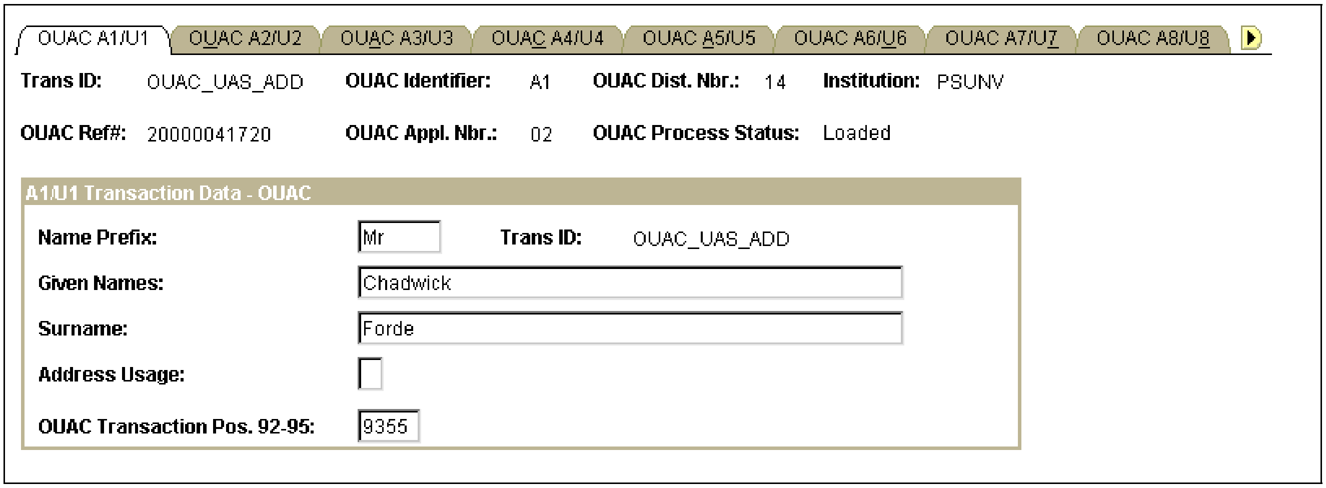
This section discusses how to use the OUAC Transactions A/U component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction A/U Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC A1/U1	OUAC_A1_U1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A1/U1	Review and edit OUAC transaction data.
OUAC A2/U2	OUAC_A2_U2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A2/U2	Review and edit OUAC transaction data.
OUAC A3/U3	OUAC_A3_U3_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A3/U3	Review and edit OUAC transaction data.
OUAC A4/U4	OUAC_A4_U4_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A4/U4	Review and edit OUAC transaction data.
OUAC A5/U5	OUAC_A5_U5_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A5/U5	Review and edit OUAC transaction data.
OUAC A6/U6	OUAC_A6_U6_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A6/U6	Review and edit OUAC transaction data.
OUAC A7/U7	OUAC_A7_U7_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A7/U7	Review and edit OUAC transaction data.
OUAC A8/U8	OUAC_A8_U8_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A8/U8	Review and edit OUAC transaction data.
OUAC A9/U9	OUAC_A9_U9_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC A9/U9	Review and edit OUAC transaction data.
OUAC AR	OUAC_AR_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions A/U, OUAC AR	Review and edit OUAC transaction data.

Reviewing OUAC Transactions A1/U1

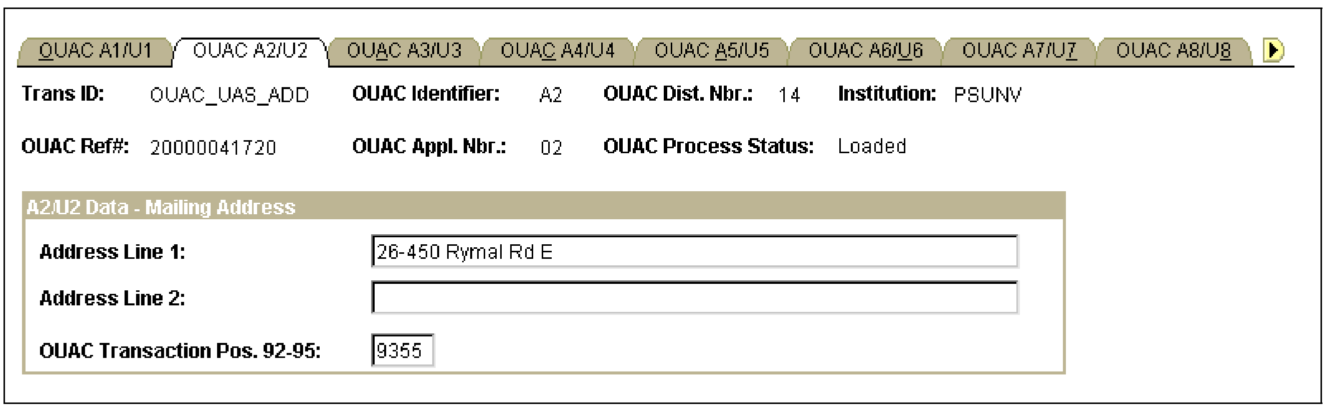
Access the OUAC A1/U1 page.



OUAC A1/U1 page

Reviewing OUAC Transactions A2/U2

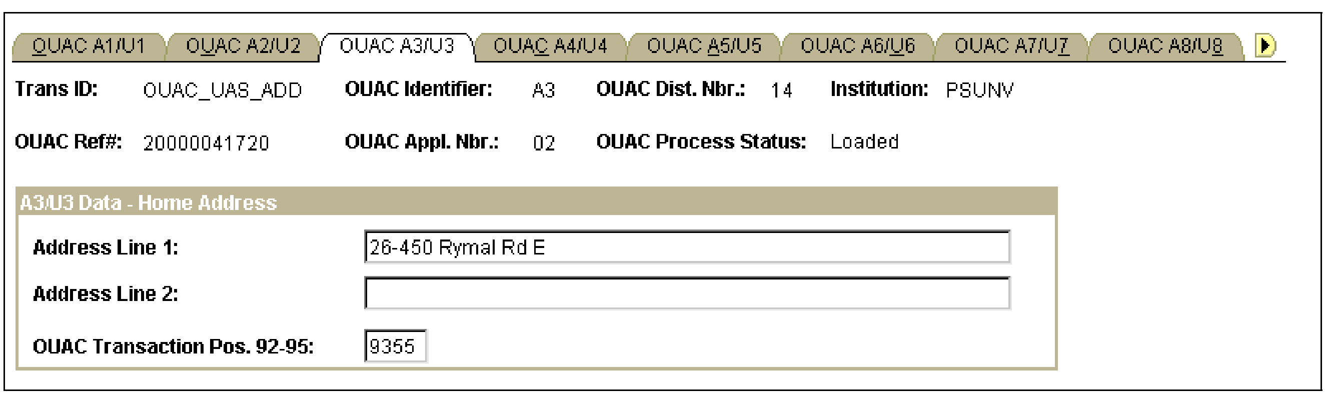
Access the OUAC A2/U2 page.



OUAC A2/U2 page

Reviewing OUAC Transactions A3/U3

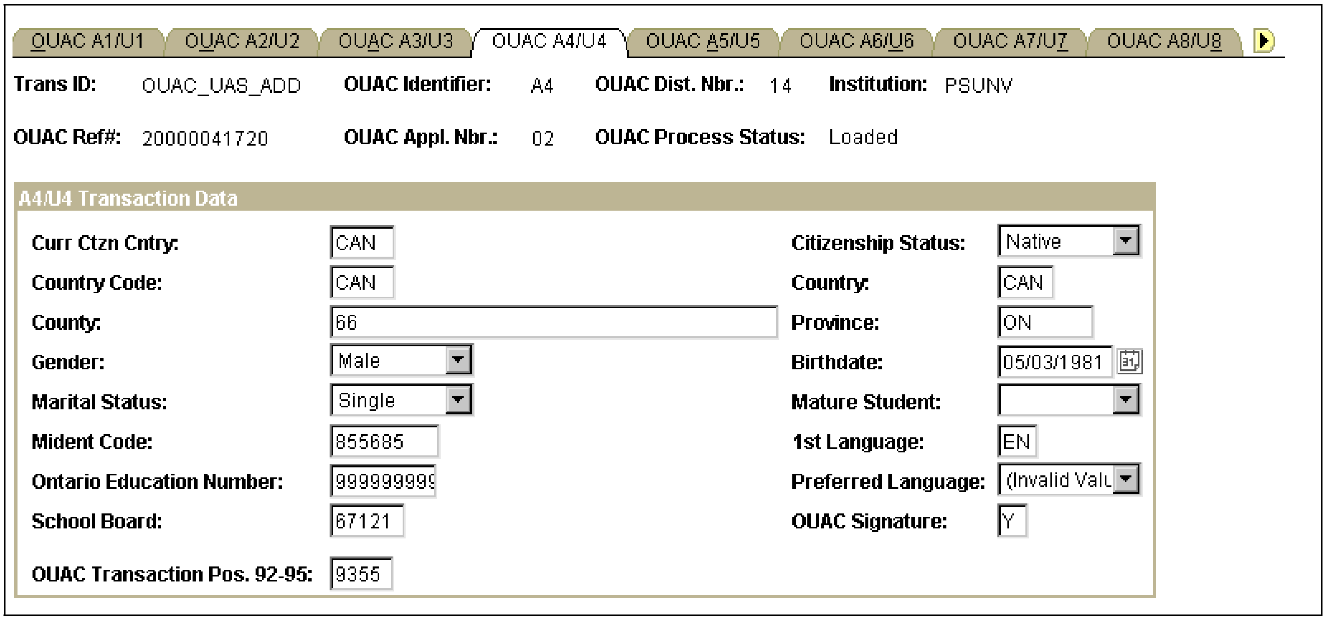
Access the OUAC A3/U3 page.



OUAC A3/U3 page

Reviewing OUAC Transactions A4/U4

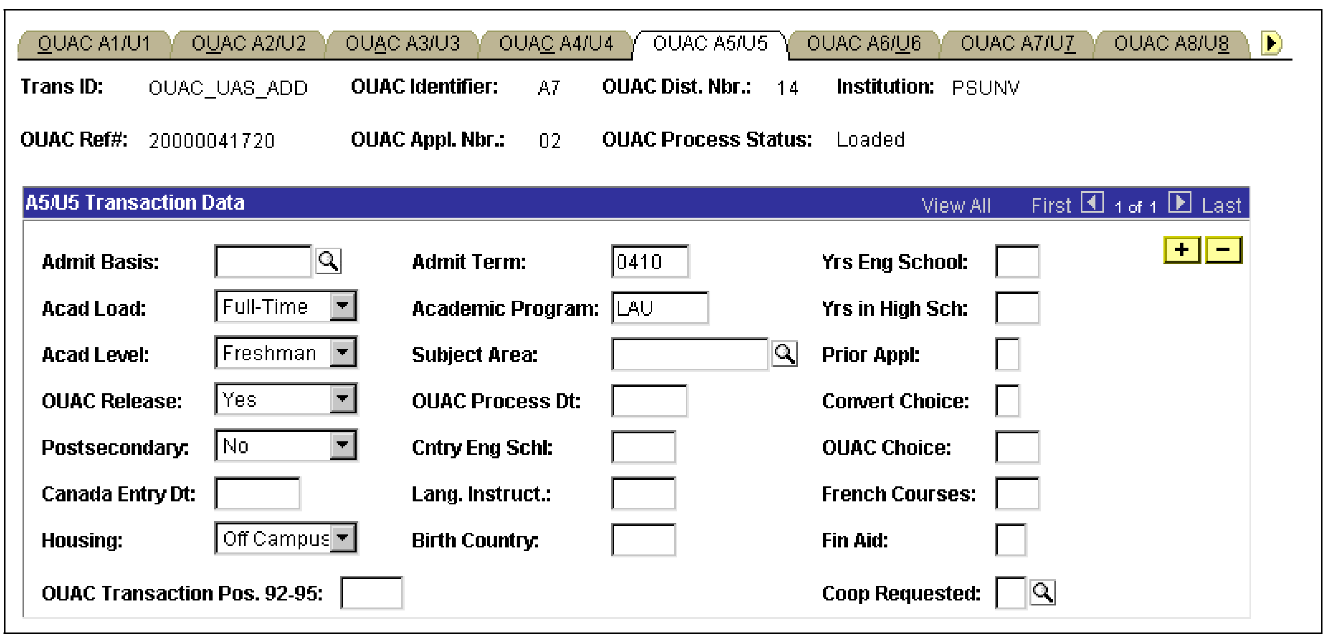
Access the OUAC A4/U4 page.



OUAC A4/U4 page

Reviewing OUAC Transactions A5/U5

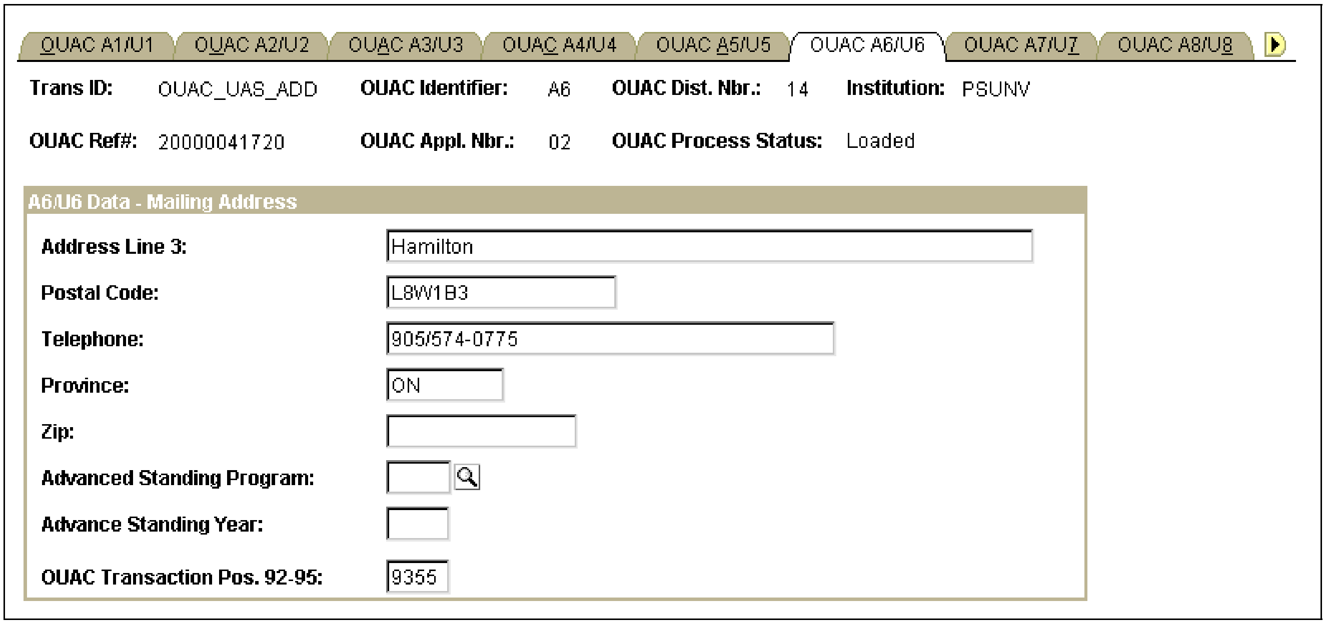
Access the OUAC A5/U5 page.



OUAC A5/U5 page

Reviewing OUAC Transactions A6/U6

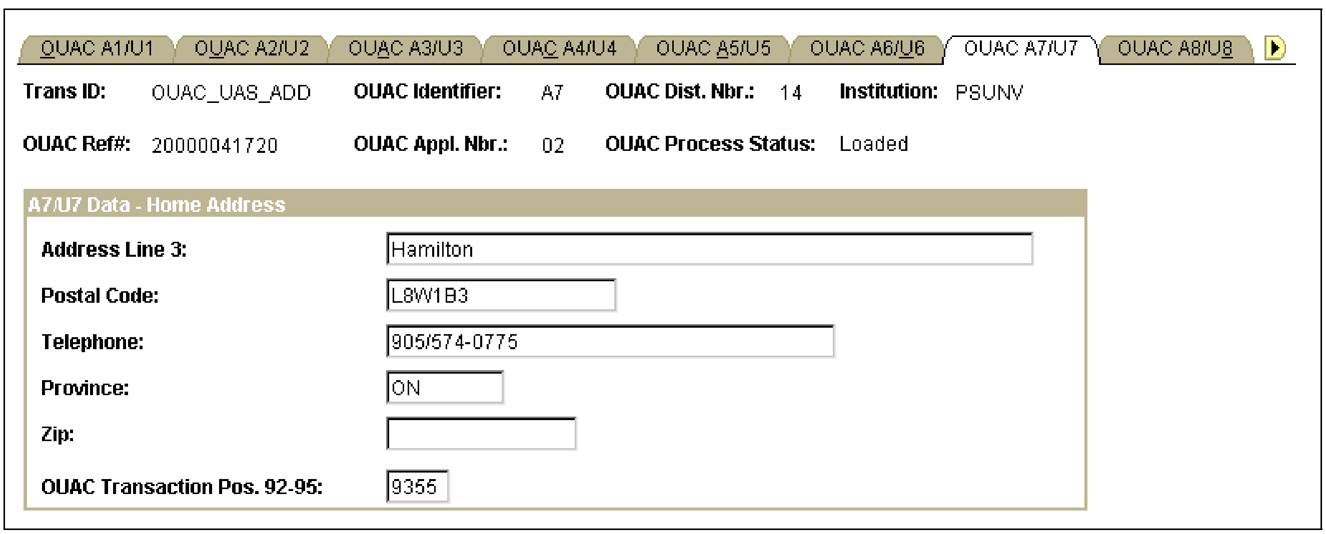
Access the OUAC A6/U6 page.



OUAC A6/U6 page

Reviewing OUAC Transactions A7/U7

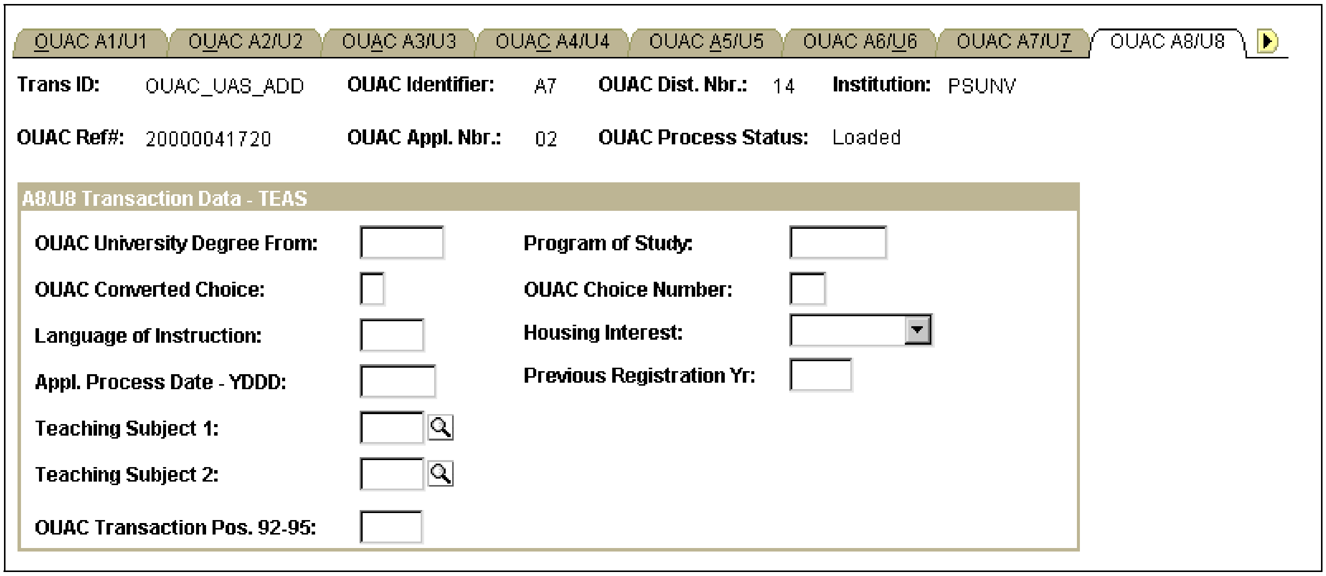
Access the OUAC A7/U7 page.



OUAC A7/U7 page

Reviewing OUAC Transactions A8/U8

Access the OUAC A8/U8 page.

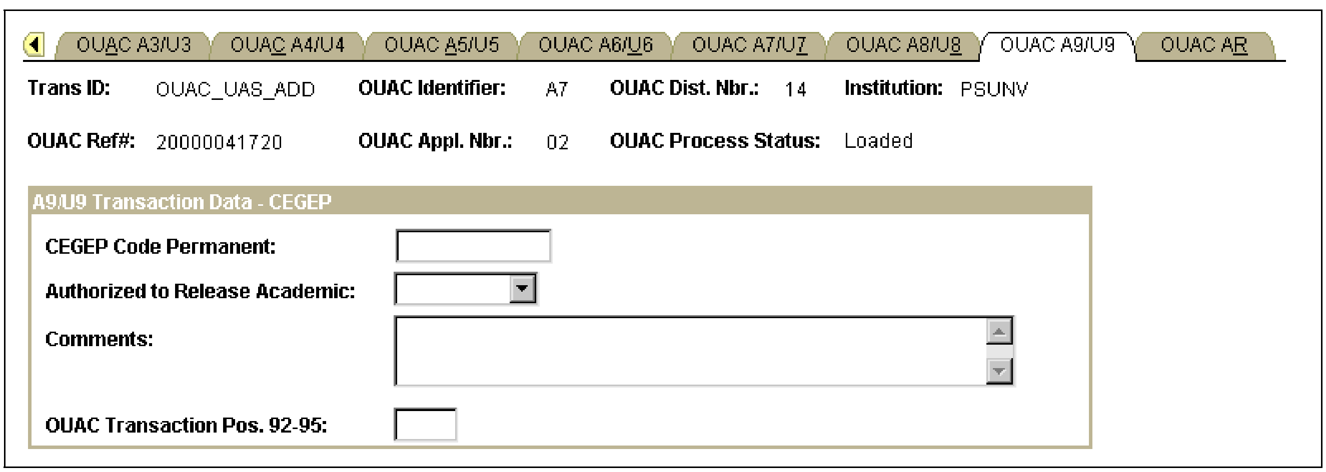


OUAC A8/U8 page

Define teaching subjects on the OUAC Teaching Subject Table page.

Reviewing OUAC Transactions A9/U9

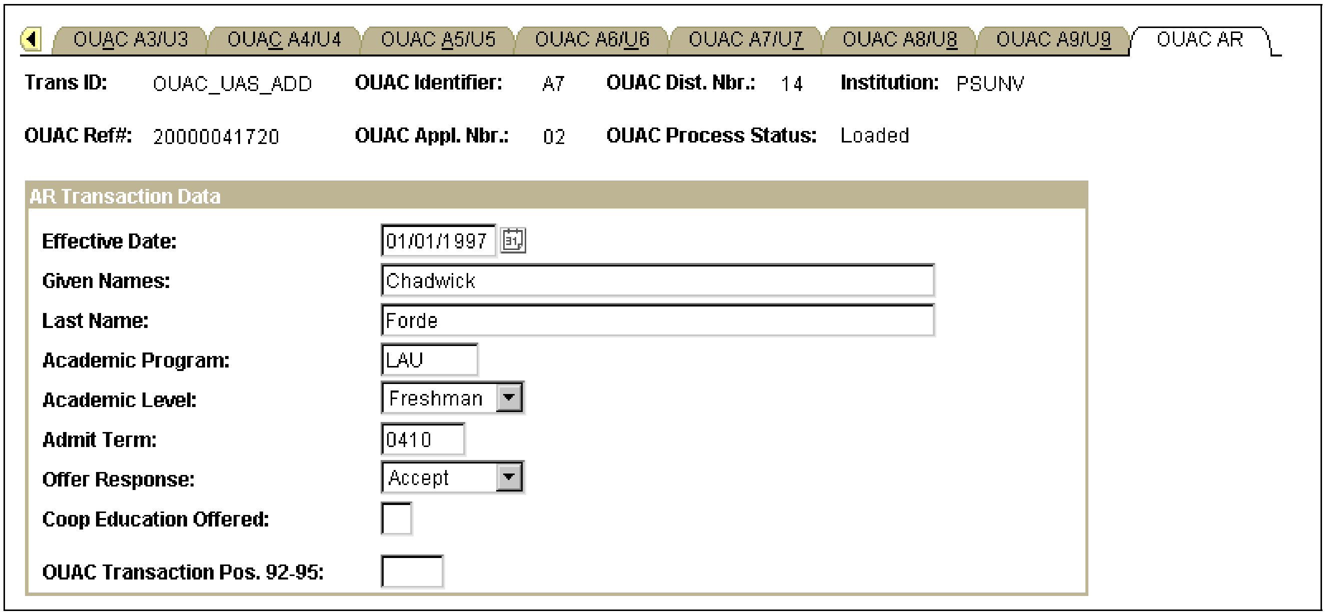
Access the OUAC A9/U9 page.



OUAC A9/U9 page

Reviewing OUAC Transactions AR

Access the OUAC AR page.



OUAC AR page

Reviewing and Editing the OUAC Transaction B5 Staging Tables

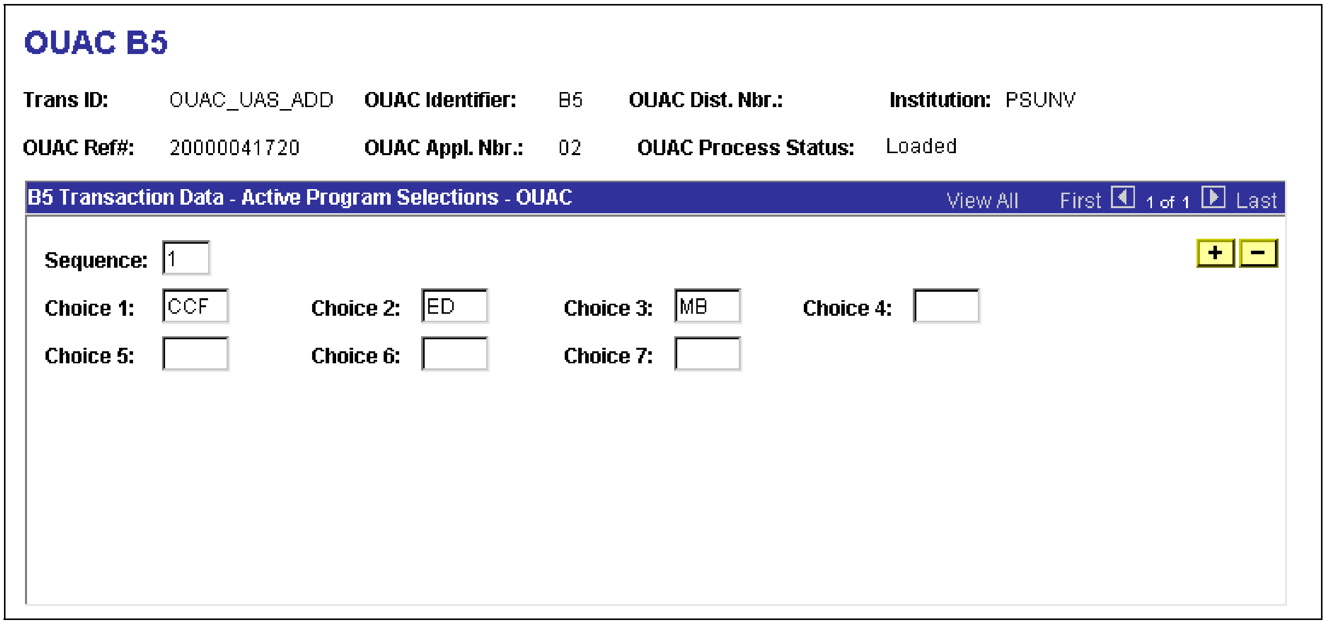
This section discusses how to use the OUAC B5 page to review and edit OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction B5 Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC B5	OUAC_B5_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B5, OUAC B5	Review and edit OUAC transaction data.

Using the OUAC B5 Page

Access the OUAC B5 page.



OUAC B5 page

Reviewing and Editing the OUAC Transaction B/V-E Staging Tables

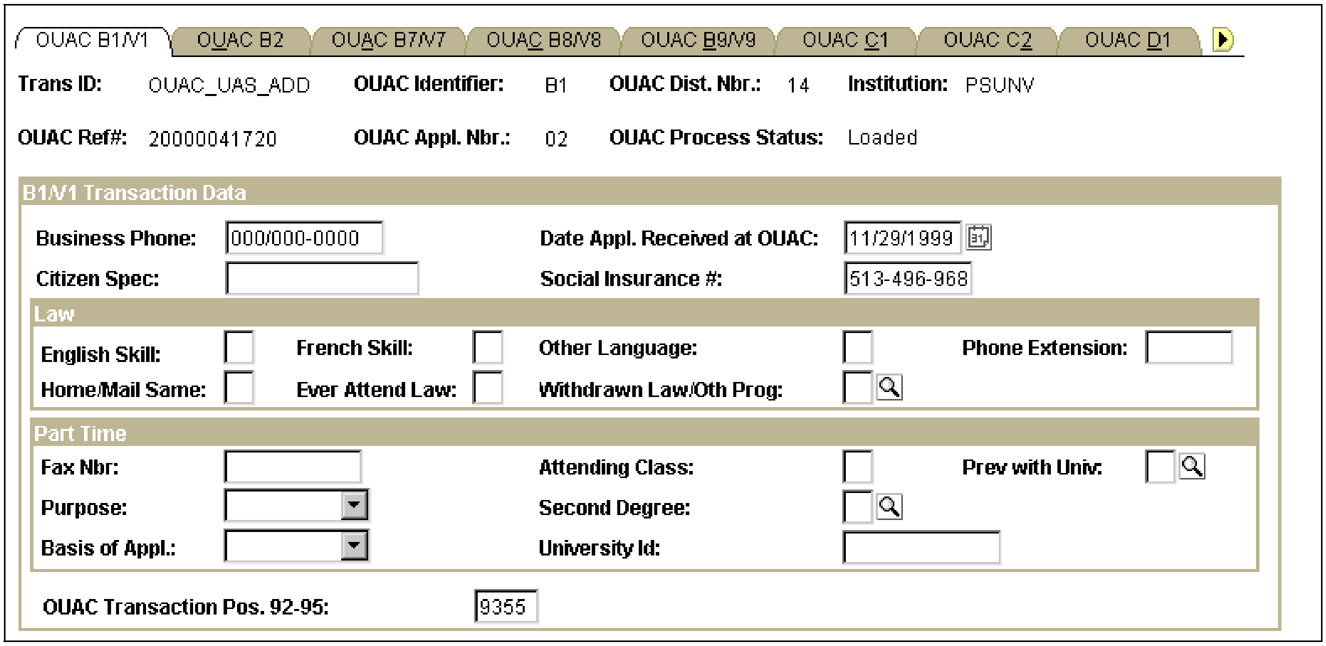
This section discusses how to use the OUAC Transactions B/V-E component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction B/V-E Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC B1/V1	OUAC_B1_V1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC B1/V1	Review and edit OUAC transaction data.
OUAC B2	OUAC_B2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC B2	Review and edit OUAC transaction data.
OUAC B7/V7	OUAC_B7_V7_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC B7/V7	Review and edit OUAC transaction data.
OUAC B8/V8	OUAC_B8_V8_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC B8/V8	Review and edit OUAC transaction data.
OUAC B9/V9	OUAC_B9_V9_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC B9/V9	Review and edit OUAC transaction data.
OUAC C1	OUAC_C1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC C1	Review and edit OUAC transaction data.
OUAC C2	OUAC_C2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC C2	Review and edit OUAC transaction data.
OUAC D1	OUAC_D1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC D1	Review and edit OUAC transaction data.
OUAC E1	OUAC_E1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions B/V - E, OUAC E1	Review and edit OUAC transaction data.

Reviewing OUAC Transactions B1/V1

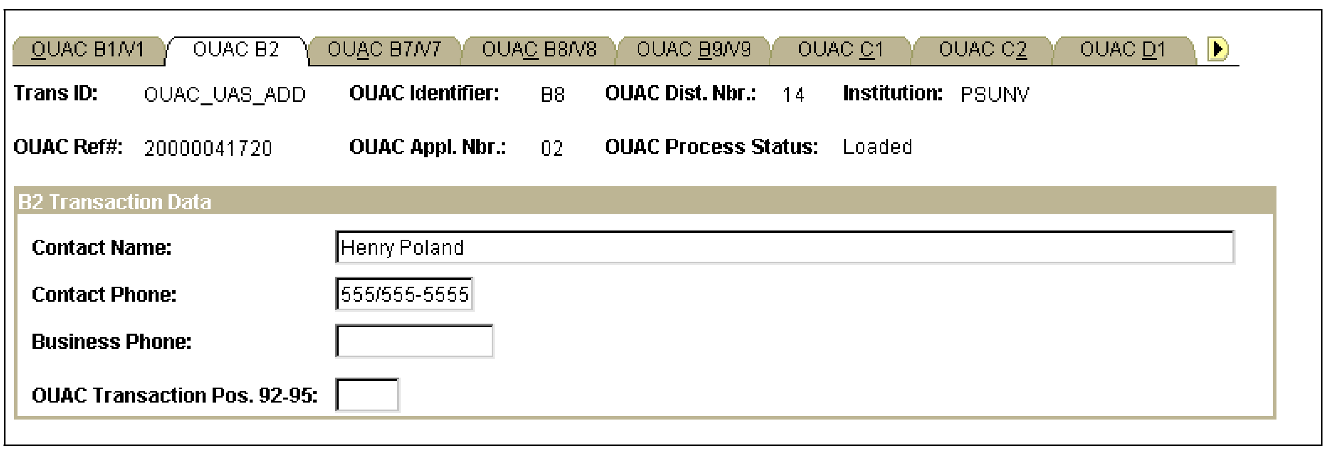
Access the OUAC B1/V1 page.



OUAC B1/V1 page

Reviewing OUAC Transactions B2

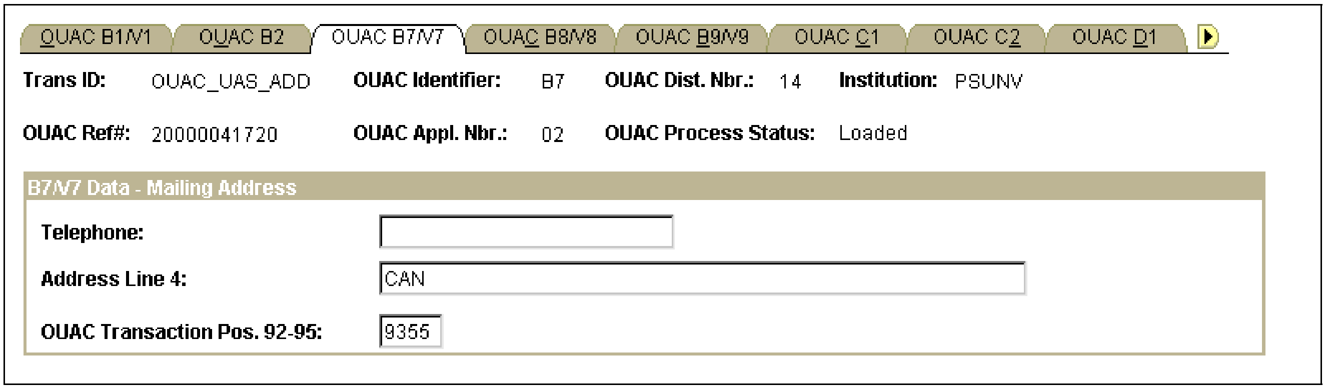
Access the OUAC B2 page.



OUAC B2 page

Reviewing OUAC Transactions B7/V7

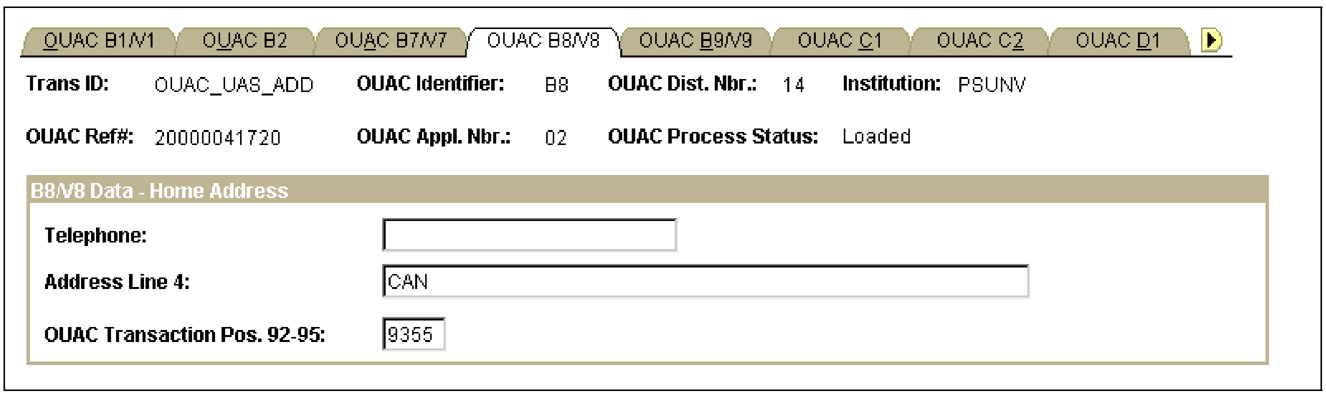
Access the OUAC B7/V7 page.



OUAC B7/V7 page

Reviewing OUAC Transactions B8/V8

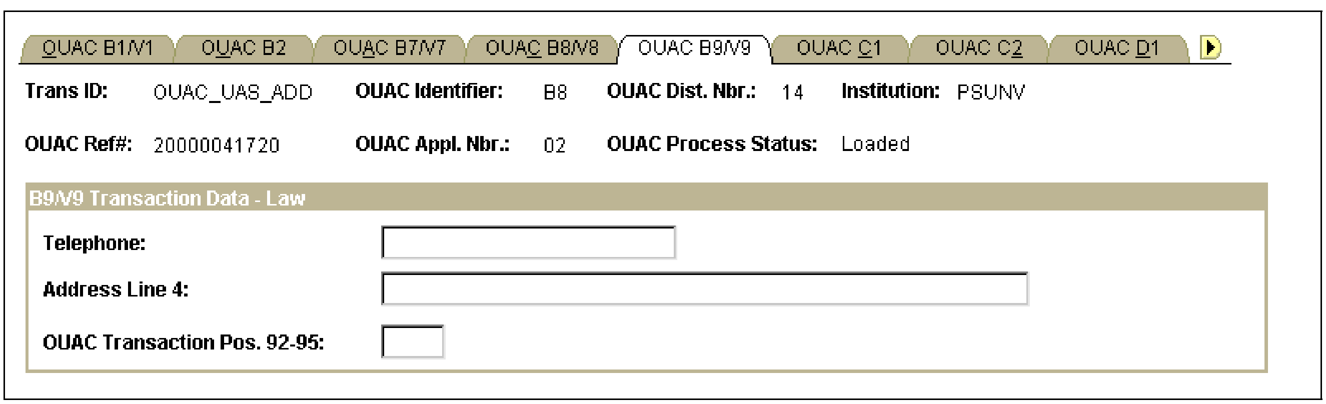
Access the OUAC B8/V8 page.



OUAC B8/V8 page

Reviewing OUAC Transactions B9/V9

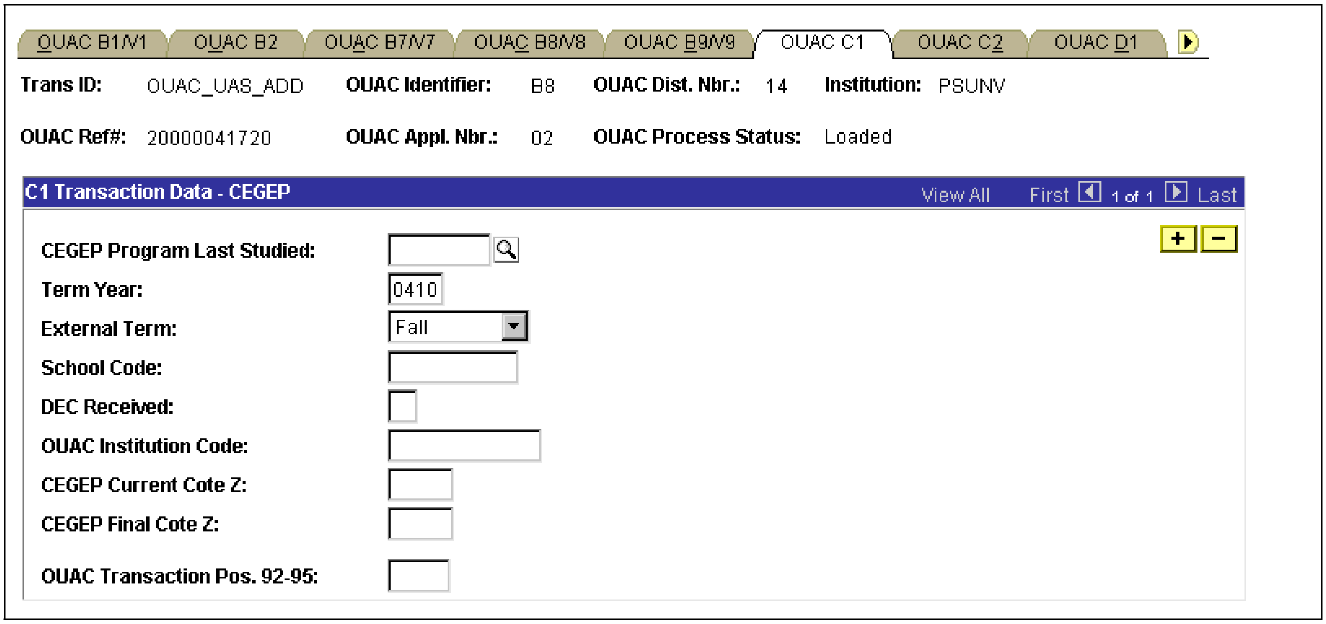
Access the OUAC B9/V9 page.



OUAC B9/V9 page

Reviewing OUAC Transactions C1

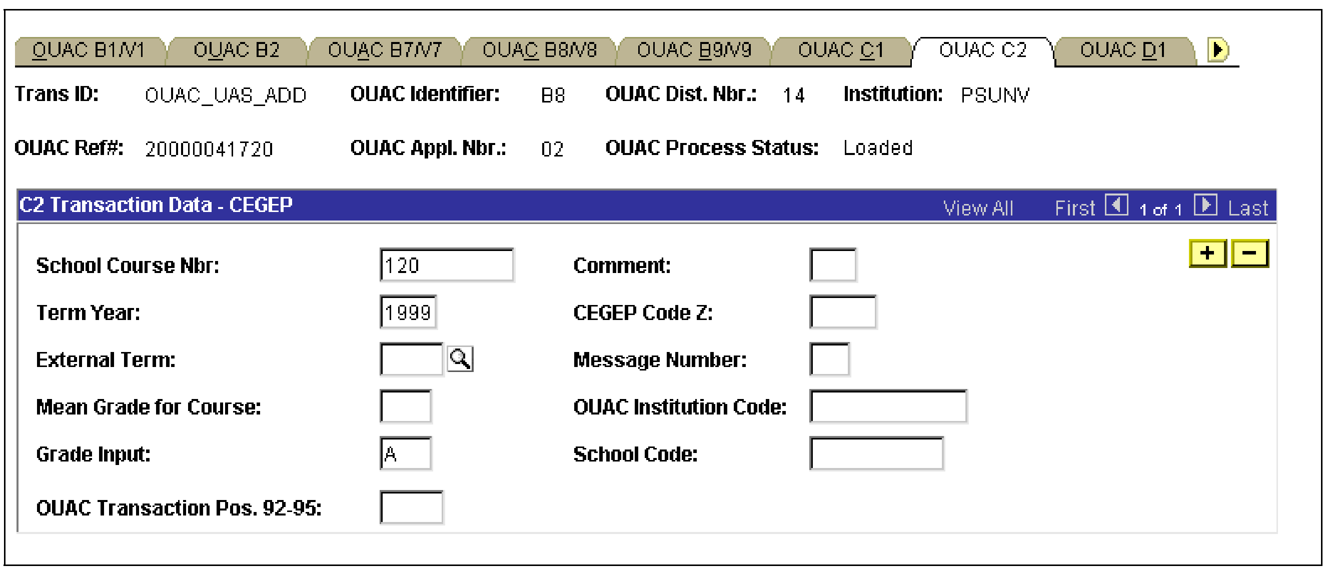
Access the OUAC C1 page.



OUAC C1 page

Reviewing OUAC Transactions C2

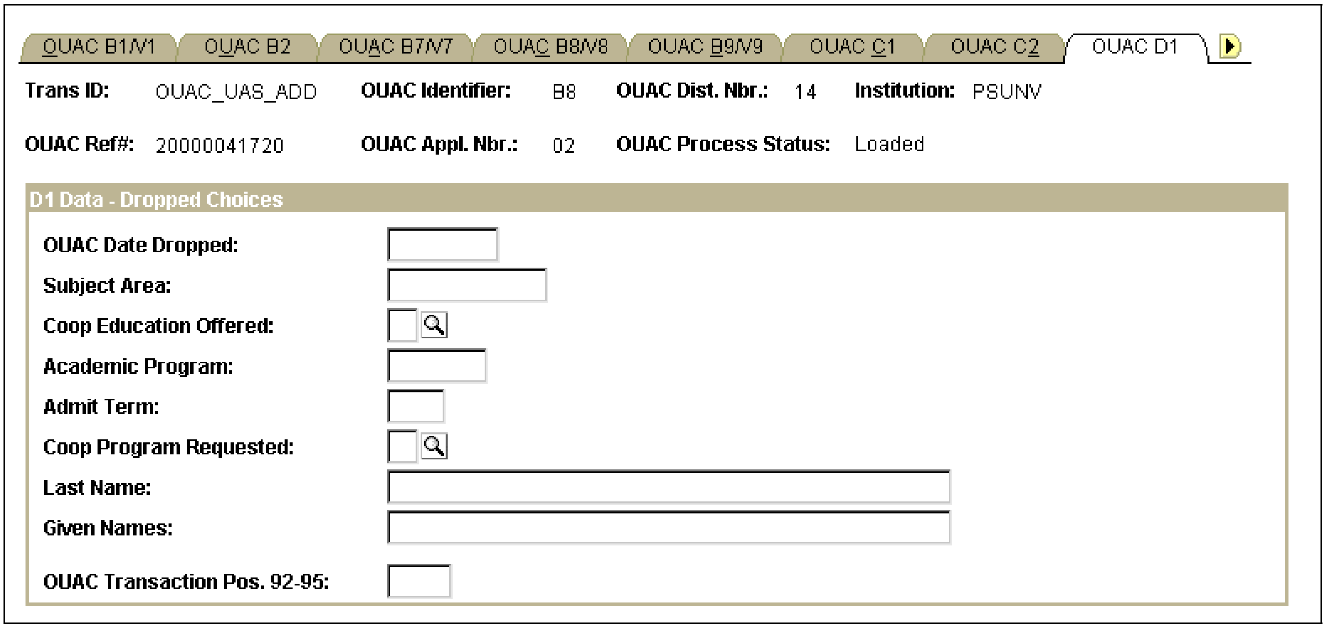
Access the OUAC C2 page.



OUAC C2 page

Reviewing OUAC Transactions D1

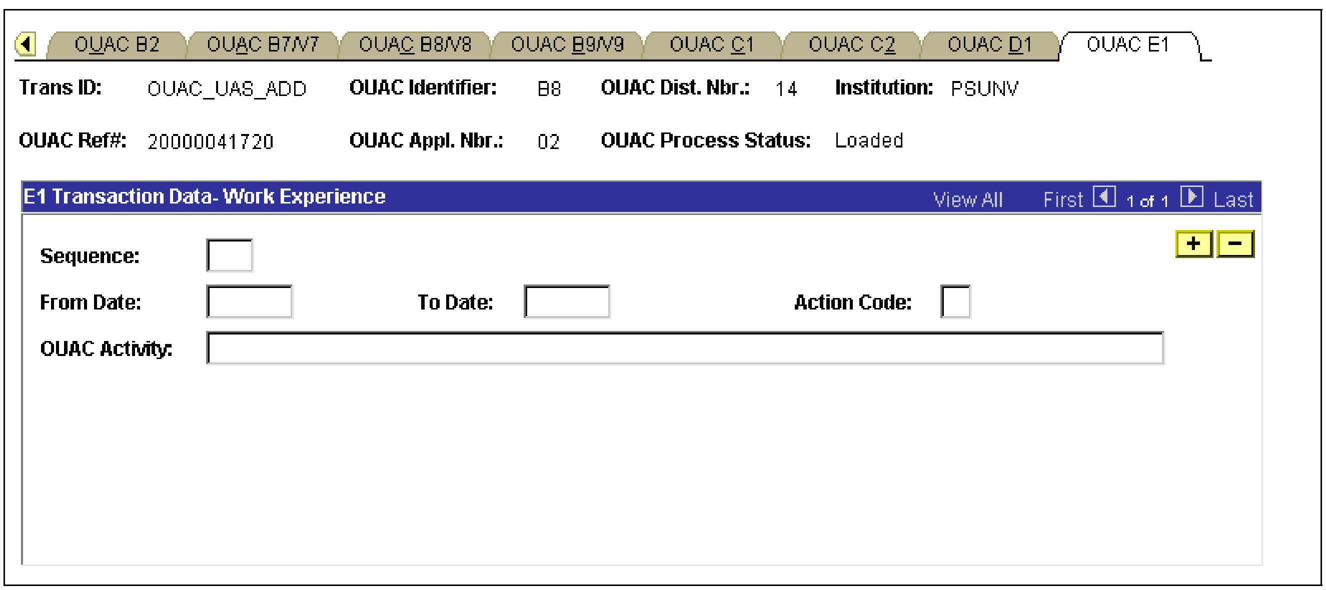
Access the OUAC D1 page.



OUAC D1 page

Reviewing OUAC Transactions E1

Access the OUAC E1 page.



OUAC E1 page

Reviewing and Editing the OUAC Transaction F Staging Tables

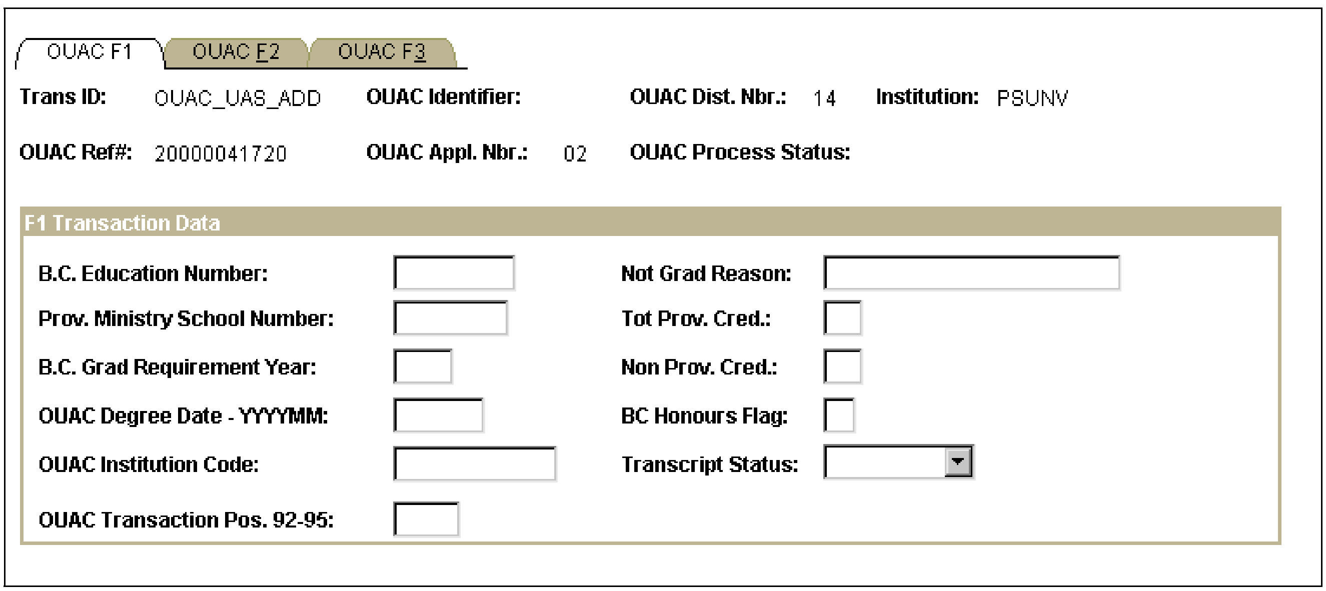
This section discusses how to use the OUAC Transactions F component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction F Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC F1	OUAC_F1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions F, OUAC F1	Review and edit OUAC transaction data.
OUAC F2	OUAC_F2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions F, OUAC F2	Review and edit OUAC transaction data.
OUAC F3	OUAC_F3_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions F, OUAC F3	Review and edit OUAC transaction data.

Reviewing OUAC Transactions F1

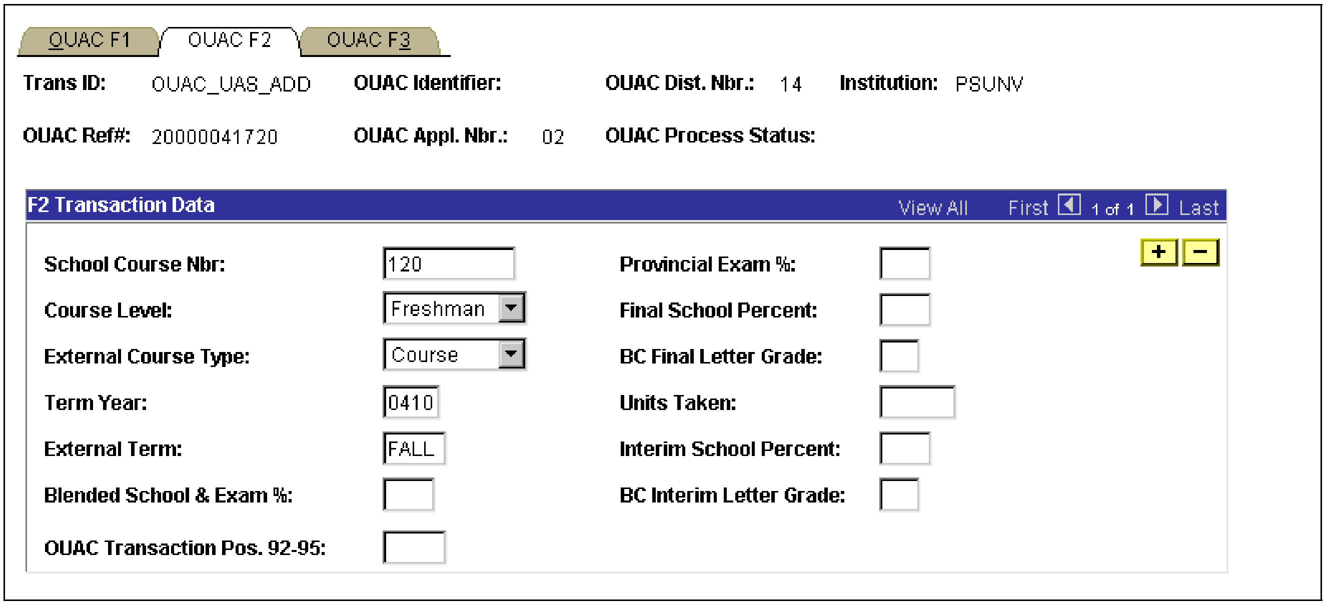
Access the OUAC F1 page.



OUAC F1 page

Reviewing OUAC Transactions F2

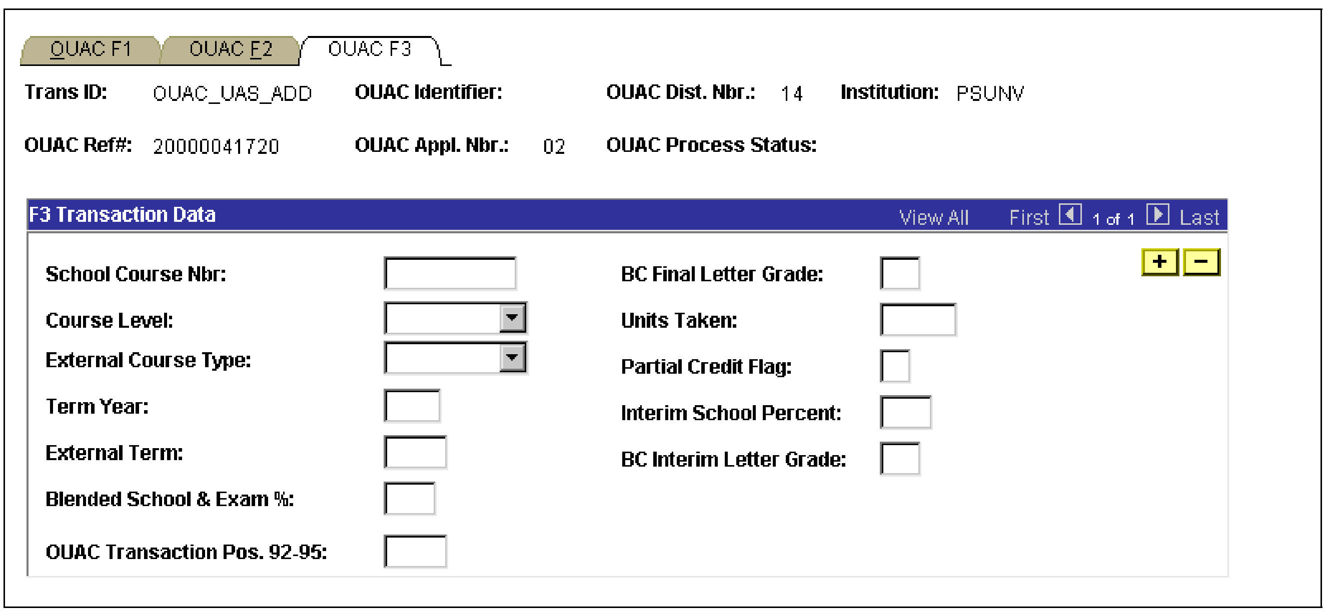
Access the OUAC F2 page.



OUAC F2 page

Reviewing OUAC Transactions F3

Access the OUAC F3 page.



OUAC F3 page

Reviewing and Editing the OUAC Transaction G/H Staging Tables

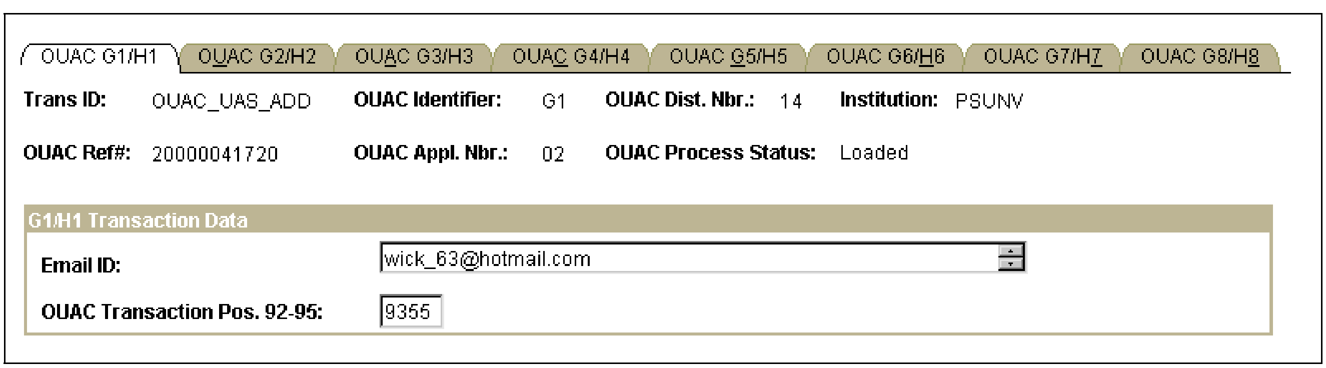
This section discusses how to use the OUAC Transactions G/H component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction G/H Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC G1/H1	OUAC_G1_H1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G1/H1	Review and edit OUAC transaction data.
OUAC G2/H2	OUAC_G2_H2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G2/H2	Review and edit OUAC transaction data.
OUAC G3/H3	OUAC_G3_H3_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G3/H3	Review and edit OUAC transaction data.
OUAC G4/H4	OUAC_G4_H4_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G4/H4	Review and edit OUAC transaction data.
OUAC G5/H5	OUAC_G5_H5_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G5/H5	Review and edit OUAC transaction data.
OUAC G6/H6	OUAC_G6_H6_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G6/H6	Review and edit OUAC transaction data.
OUAC G7/H7	OUAC_G7_H7_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G7/H7	Review and edit OUAC transaction data.
OUAC G8/H8	OUAC_G8_H8_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions G/H, OUAC G8/H8	Review and edit OUAC transaction data.

Reviewing OUAC Transactions G1/H1

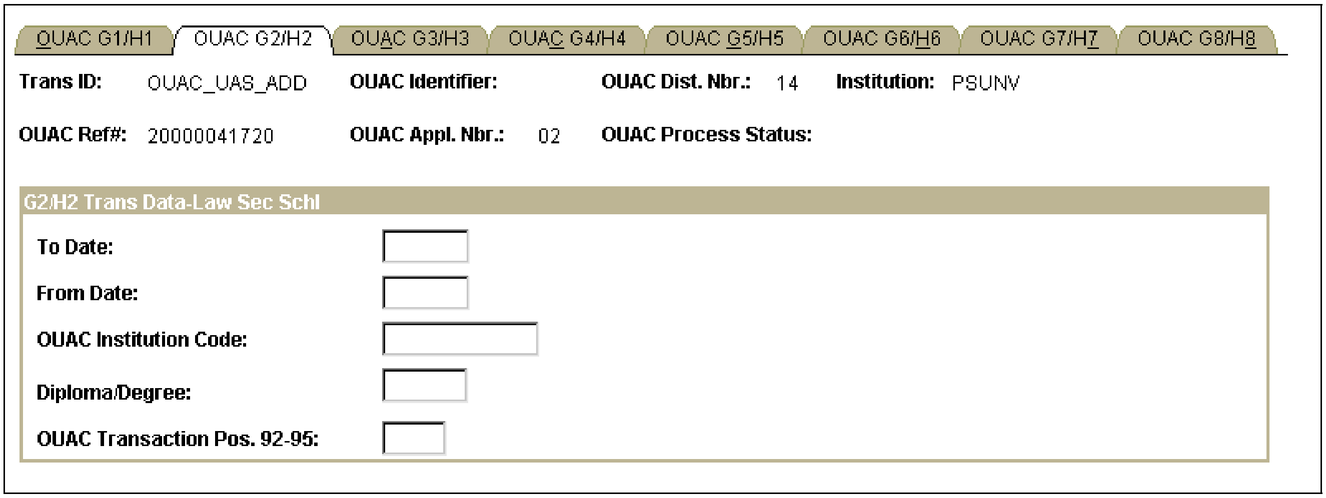
Access the OUAC G1/H1 page.



OUAC G1/H1 page

Reviewing OUAC Transactions G2/H2

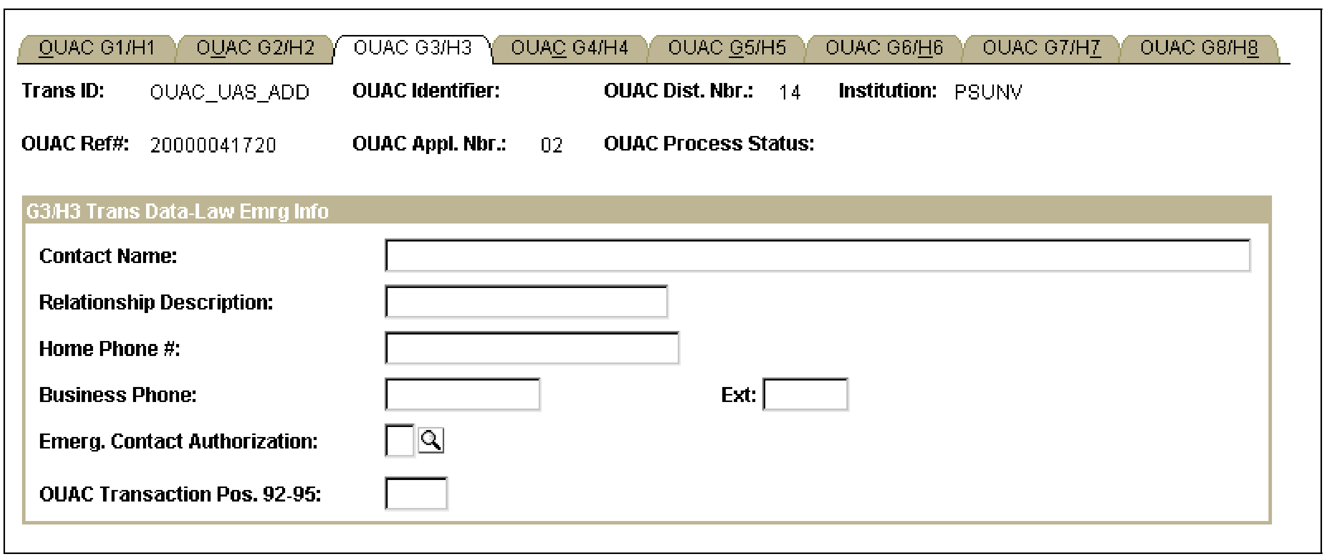
Access the OUAC G2/H2 page.



OUAC G2/H2 page

Reviewing OUAC Transactions G3/H3

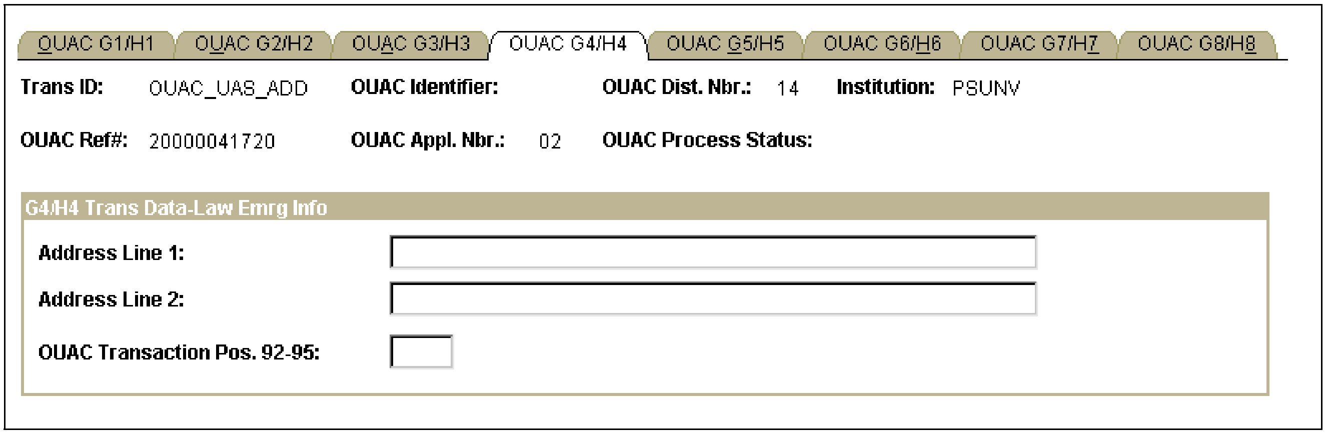
Access the OUAC G3/H3 page.



OUAC G3/H3 page

Reviewing OUAC Transactions G4/H4

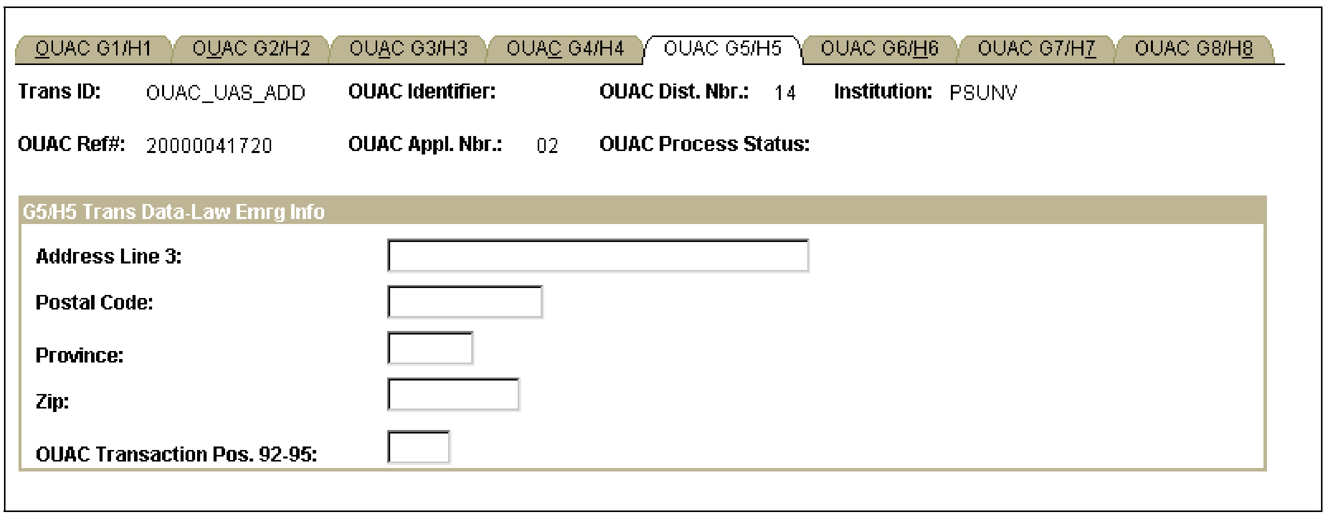
Access the OUAC G4/H4 page.



OUAC G4/H4 page

Reviewing OUAC Transactions G5/H5

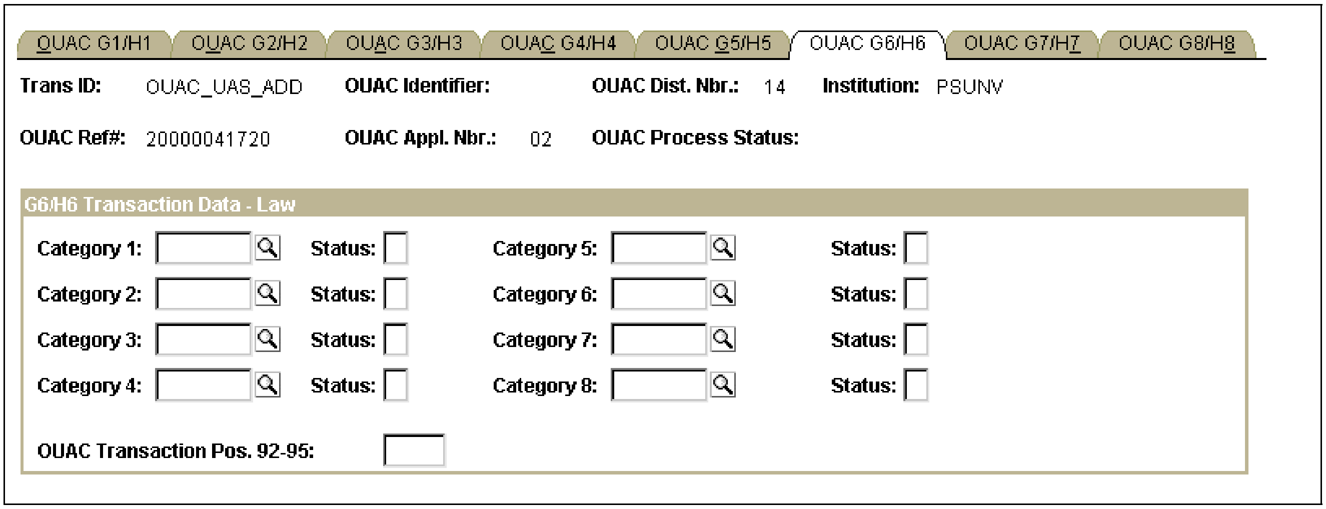
Access the OUAC G5/H5 page.



OUAC G5/H5 page

Reviewing OUAC Transactions G6/H6

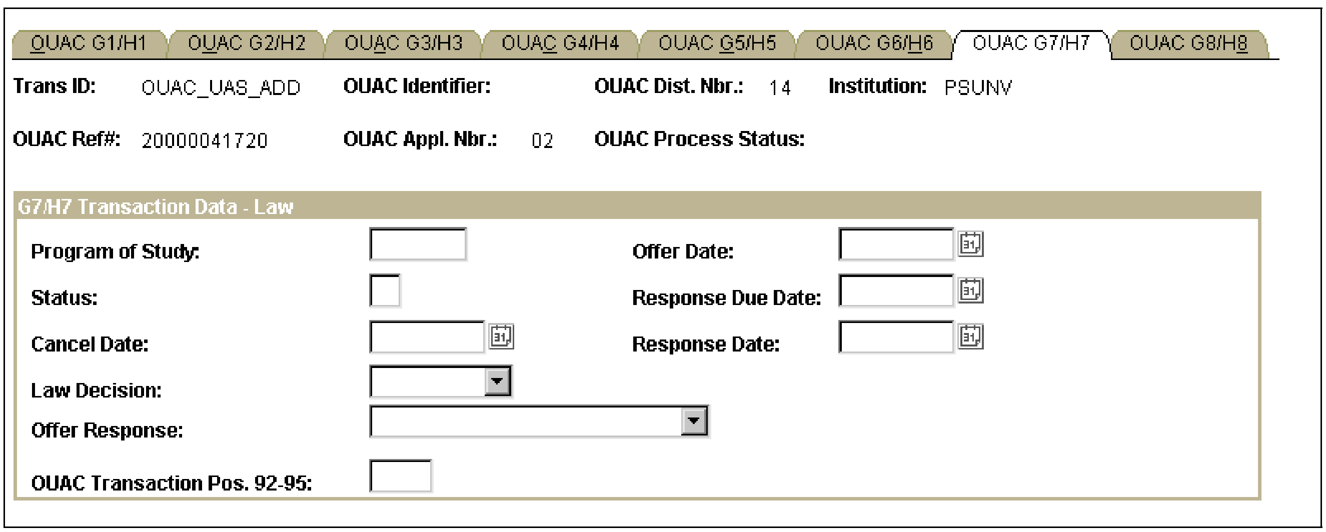
Access the OUAC G6/H6 page.



OUAC G6/H6 page

Reviewing OUAC Transactions G7/H7

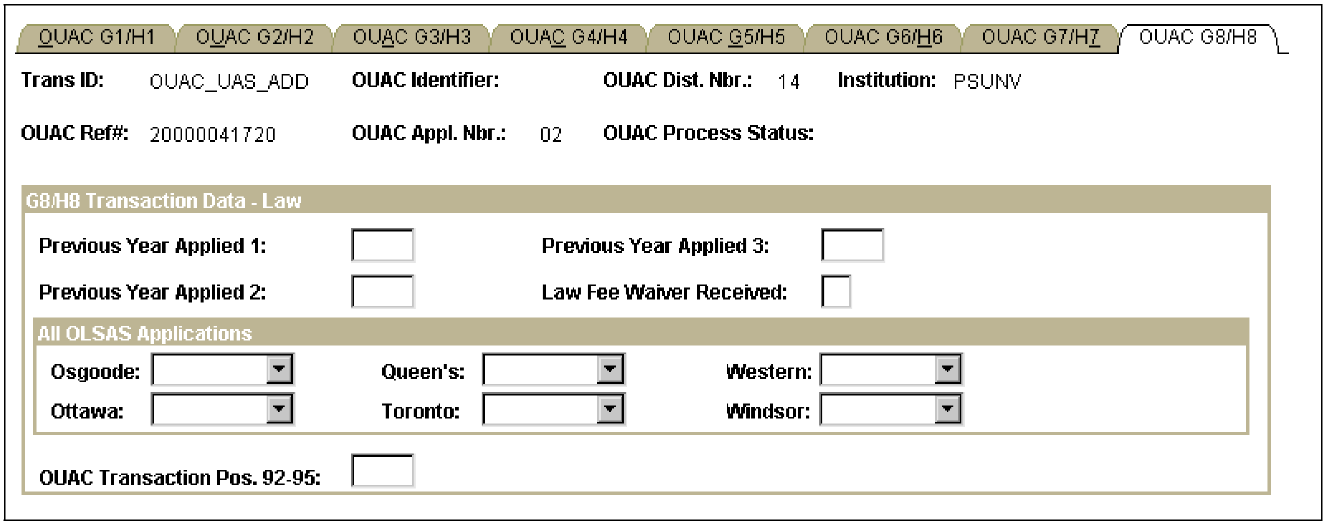
Access the OUAC G7/H7 page.



OUAC G7/H7 page

Reviewing OUAC Transactions G8/H8

Access the OUAC G8/H8 page.



OUAC G8/H8 page

Reviewing and Editing the OUAC Transaction J-N Staging Tables

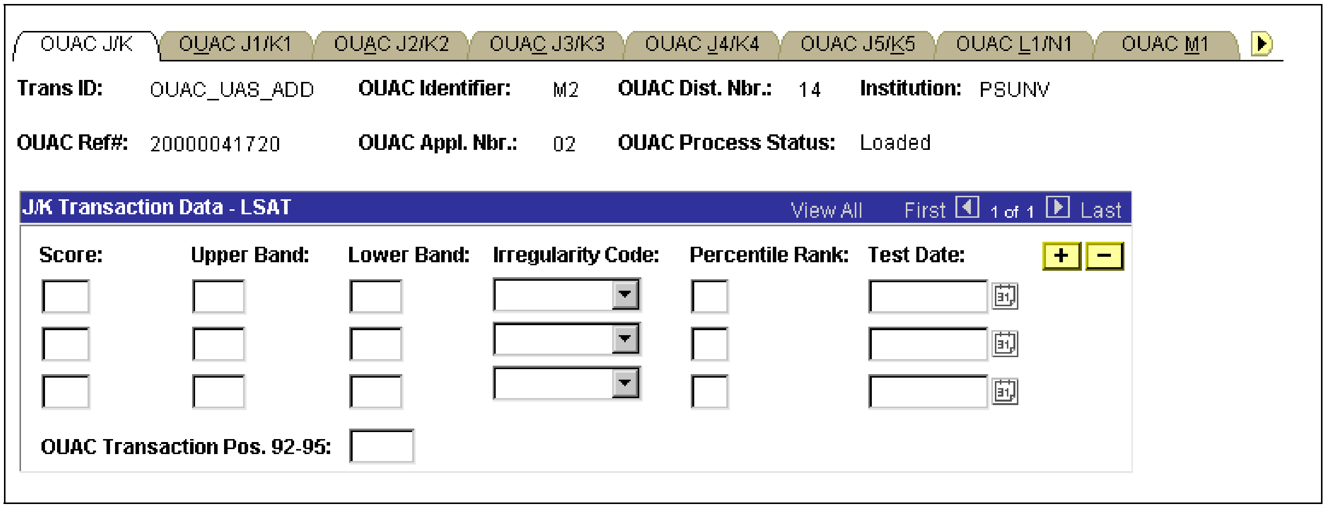
This section discusses how to use the OUAC Transactions J-N component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction J-N Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC J/K	OUAC_J_K_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC J/K	Review and edit OUAC transaction data.
OUAC J1/K1	OUAC_J1_K1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC J1/K1	Review and edit OUAC transaction data.
OUAC J2/K2	OUAC_J2_K2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC J2/K2	Review and edit OUAC transaction data.
OUAC J3/K3	OUAC_J3_K3_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC J3/K3	Review and edit OUAC transaction data.
OUAC J4/K4	OUAC_J4_K4_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC J4/K4	Review and edit OUAC transaction data.
OUAC J5/K5	OUAC_J5_K5_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC J5/K5	Review and edit OUAC transaction data.
OUAC L1/N1	OUAC_L1_N1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC L1/N1	Review and edit OUAC transaction data.
OUAC M1	OUAC_M1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC M1	Review and edit OUAC transaction data.
OUAC M2	OUAC_M2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions J - N, OUAC M2	Review and edit OUAC transaction data.

Reviewing OUAC Transactions J/K

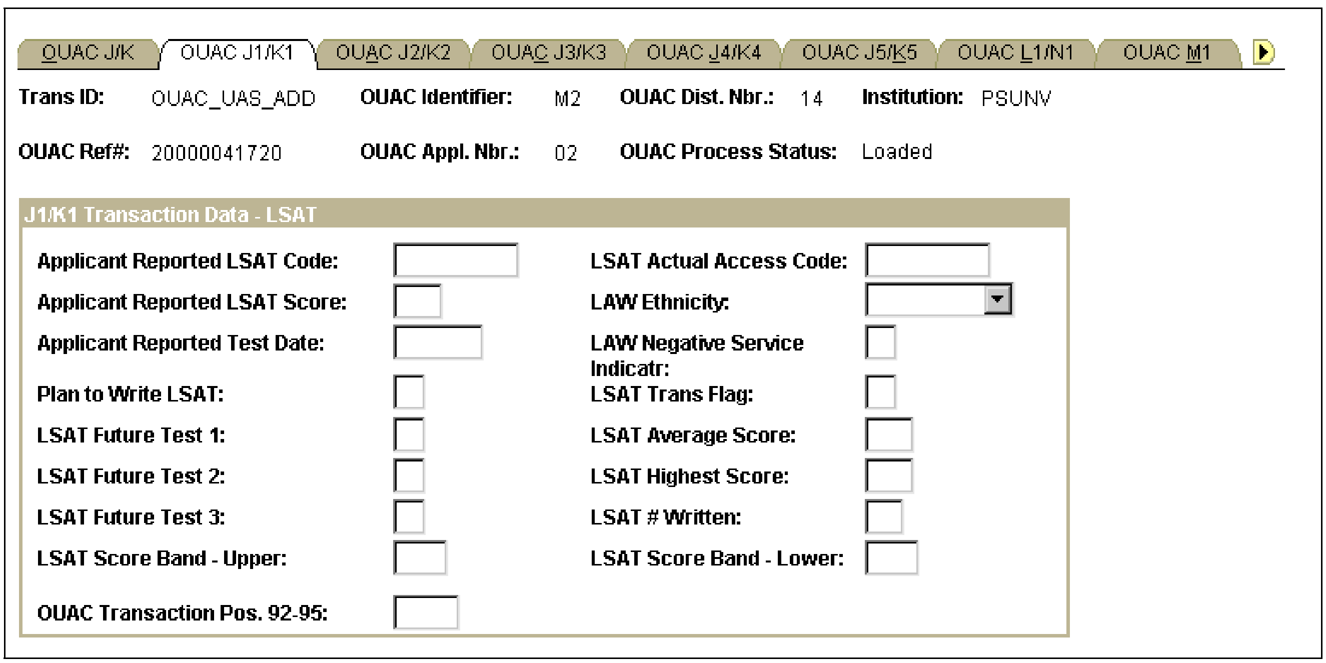
Access the OUAC J/K page.



OUAC J/K page

Reviewing OUAC Transactions J1/K1

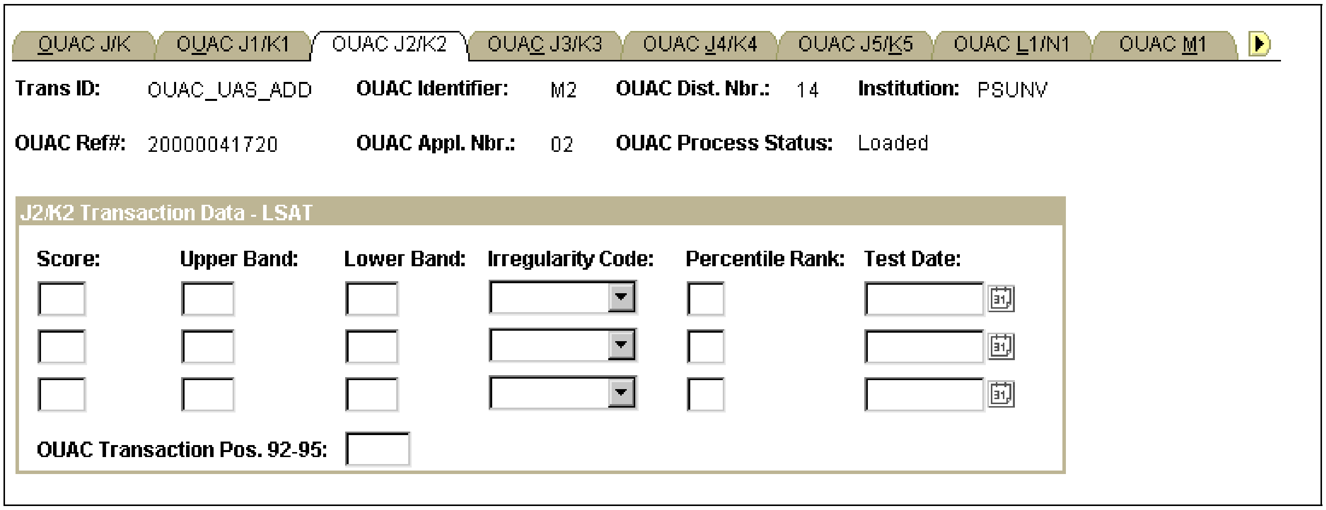
Access the OUAC J1/K1 page.



OUAC J1/K1 page

Reviewing OUAC Transactions J2/K2

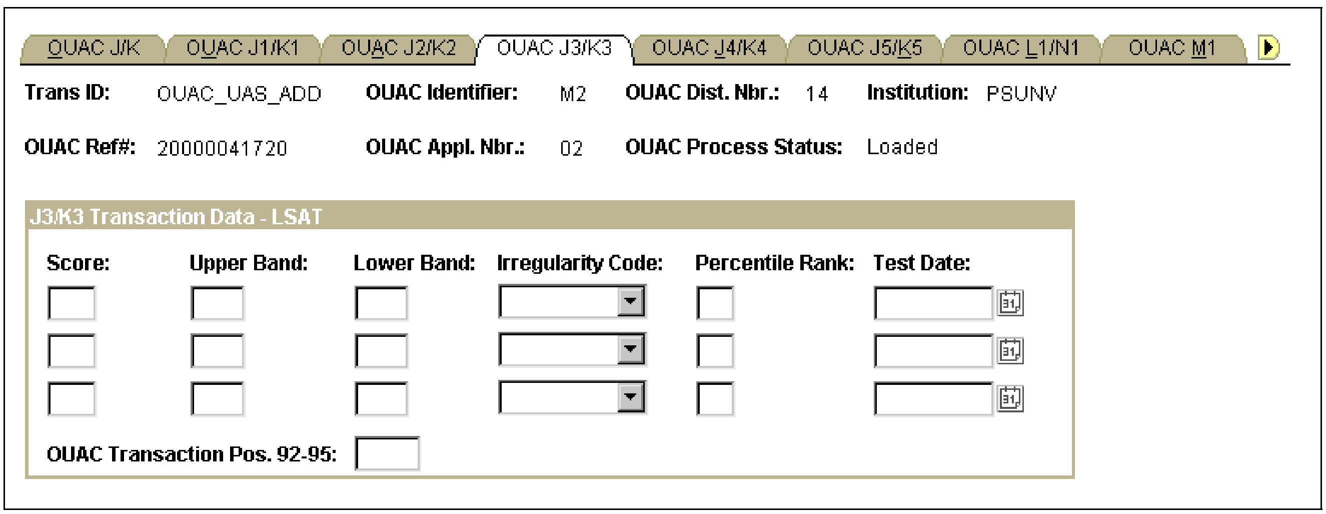
Access the OUAC J2/K2 page.



OUAC J2/K2 page

Reviewing OUAC Transactions J3/K3

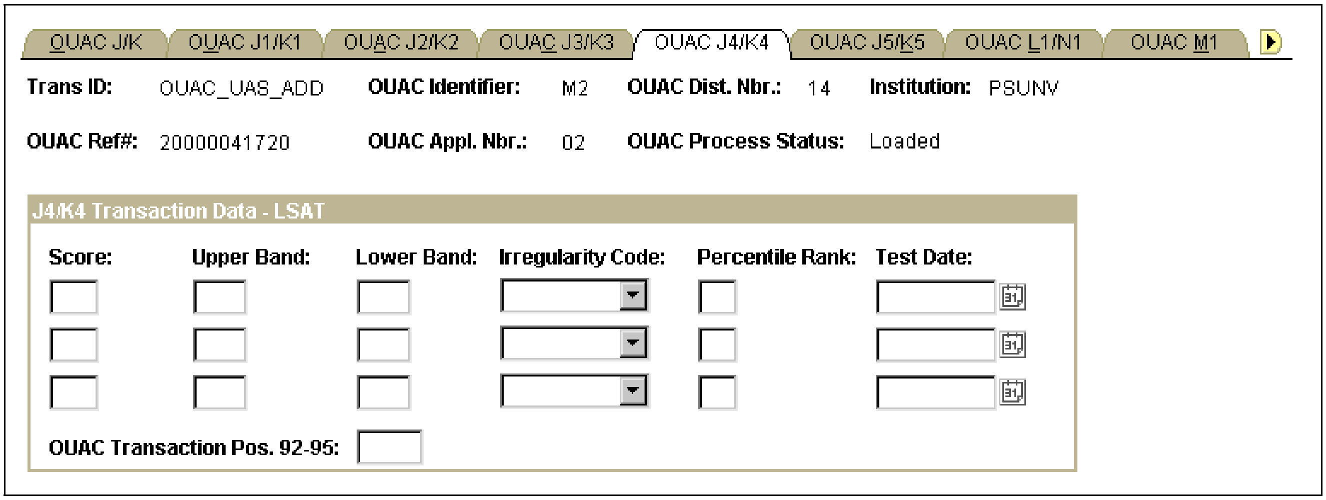
Access the OUAC J3/K3 page.



OUAC J3/K3 page

Reviewing OUAC Transactions J4/K4

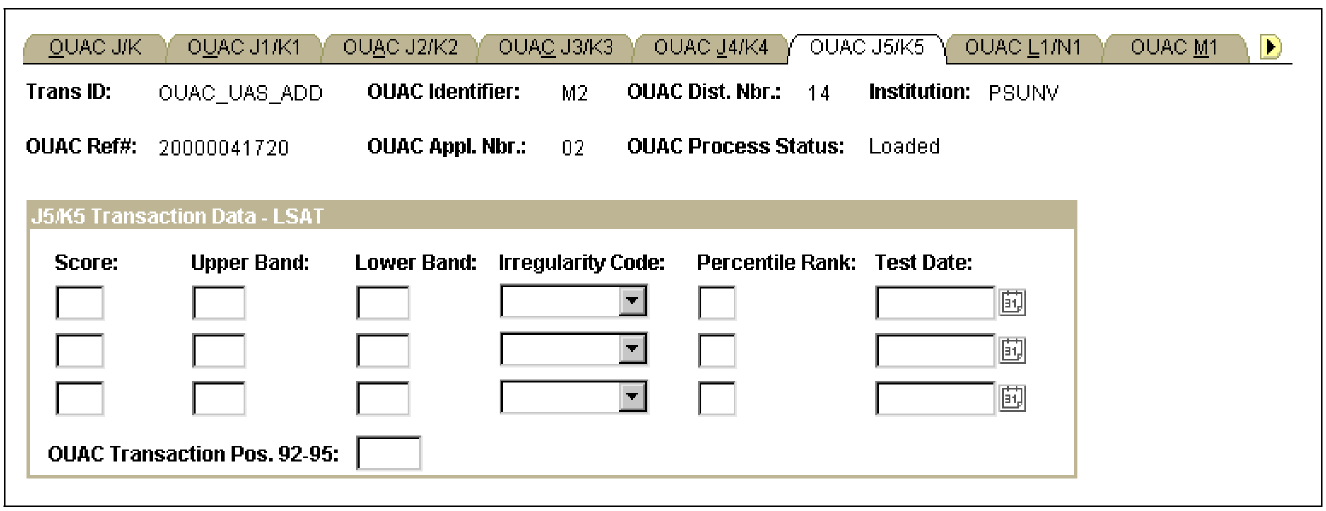
Access the OUAC J4/K4 page.



OUAC J4/K4 page

Reviewing OUAC Transactions J5/K5

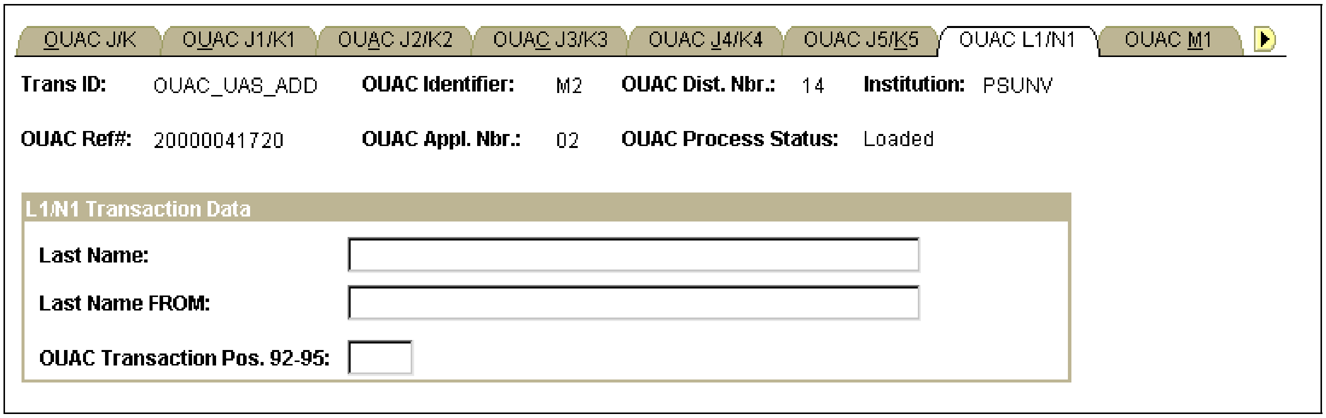
Access the OUAC J5/K5 page.



OUAC J5/K5 page

Reviewing OUAC Transactions L1/N1

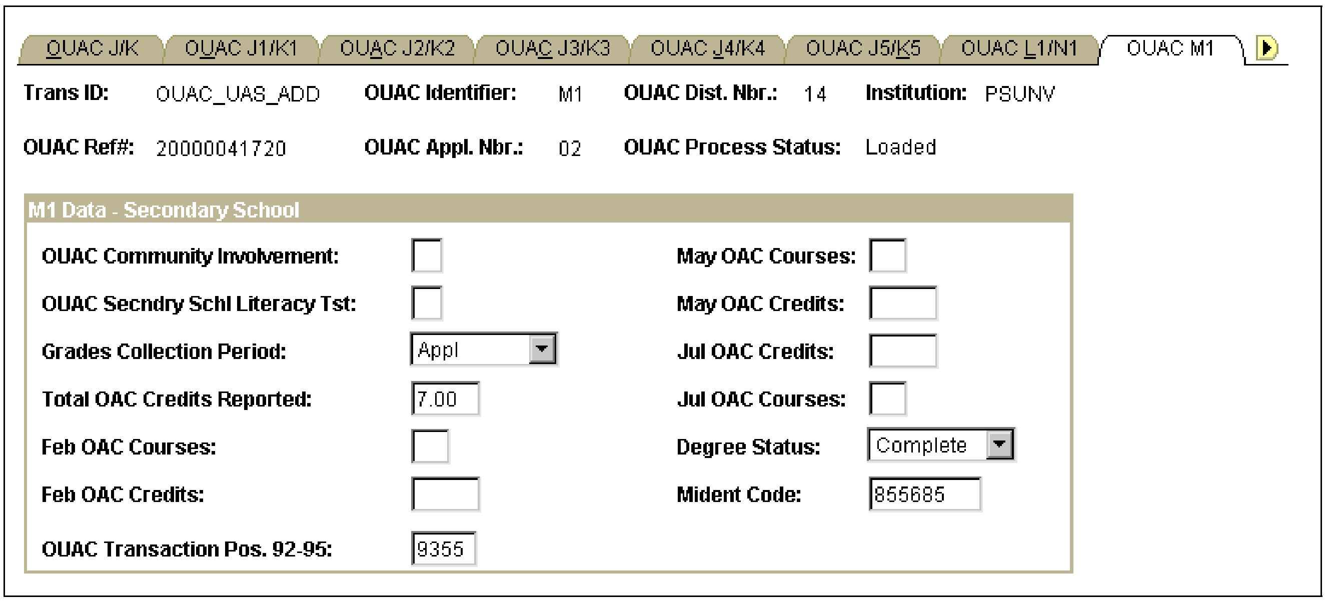
Access the OUAC L1/N1 page.



OUAC L1/N1 page

Reviewing OUAC Transactions M1

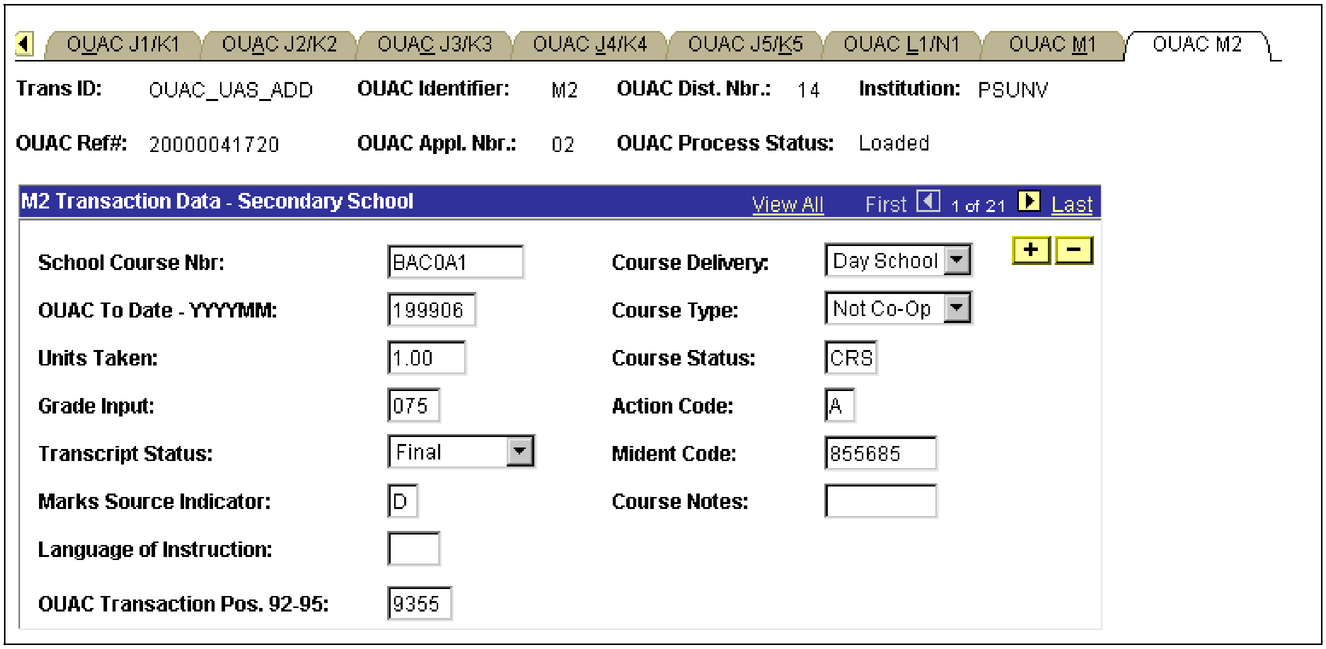
Access the OUAC M1 page.



OUAC M1 page

Reviewing OUAC Transactions M2

Access the OUAC M2 page.



OUAC M2 page

Reviewing and Editing the OUAC Transaction P-R Staging Tables

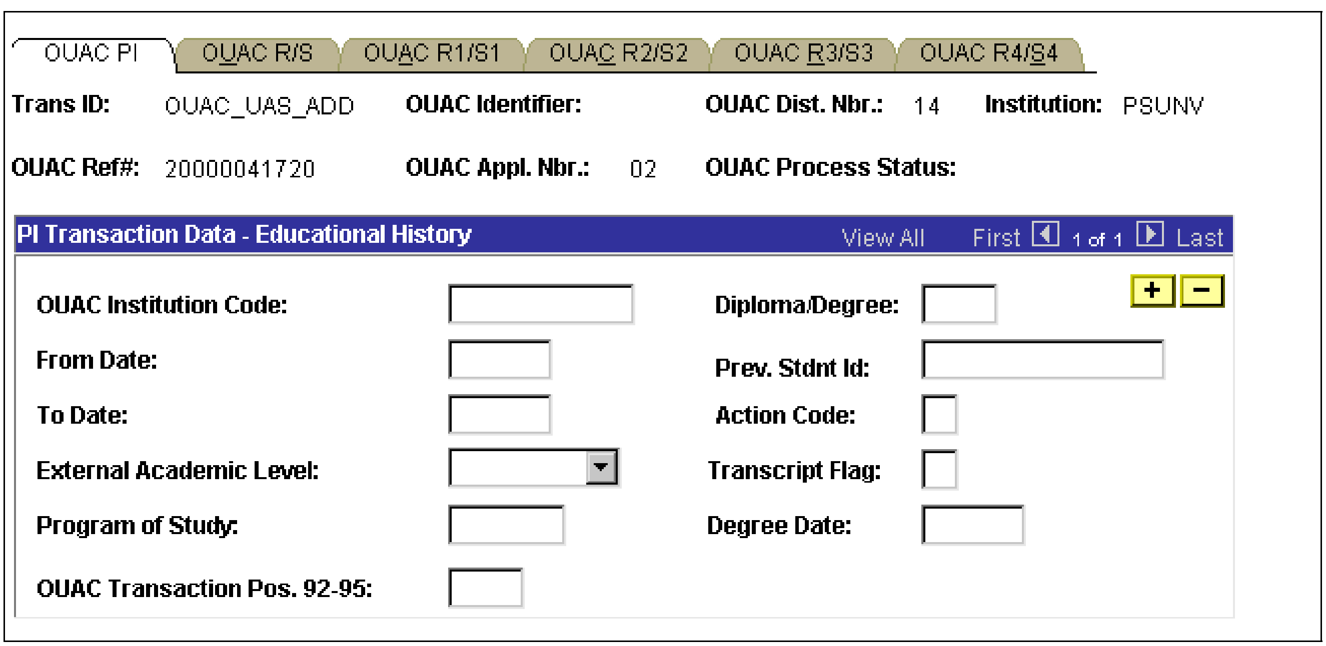
This section discusses how to use the OUAC Transactions P-R component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction P-R Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC PI	OUAC_PI_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions P - R, OUAC PI	Review and edit OUAC transaction data.
OUAC R/S	OUAC_R_S_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions P - R, OUAC R/S	Review and edit OUAC transaction data.
OUAC R1/S1	OUAC_R1_S1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions P - R, OUAC R1/S1	Review and edit OUAC transaction data.
OUAC R2/S2	OUAC_R2_S2_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions P - R, OUAC R2/S2	Review and edit OUAC transaction data.
OUAC R3/S3	OUAC_R3_S3_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions P - R, OUAC R3/S3	Review and edit OUAC transaction data.
OUAC R4/S4	OUAC_R4_S4_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions P - R, OUAC R4/S4	Review and edit OUAC transaction data.

Reviewing OUAC Transactions PI

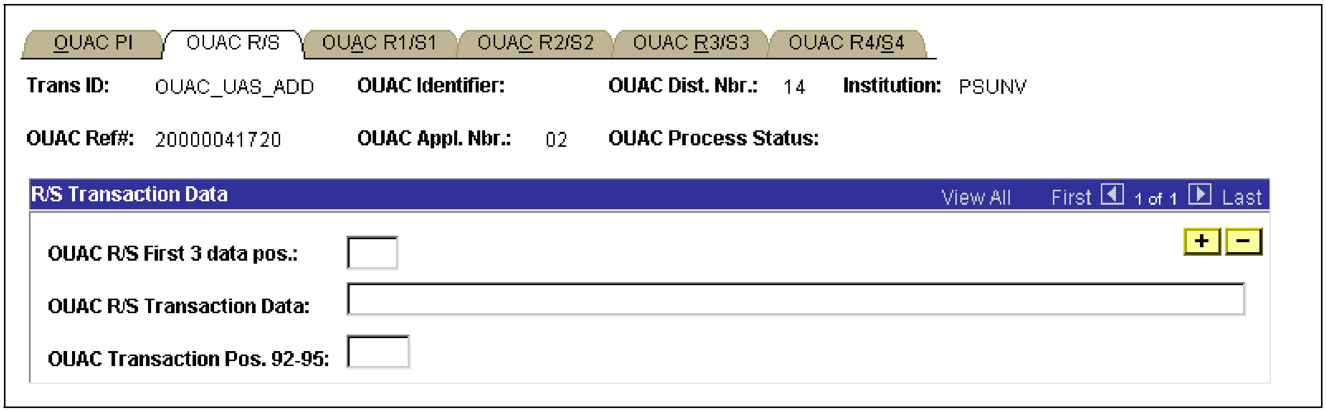
Access the OUAC PI page.



OUAC PI page

Reviewing OUAC Transactions R/S

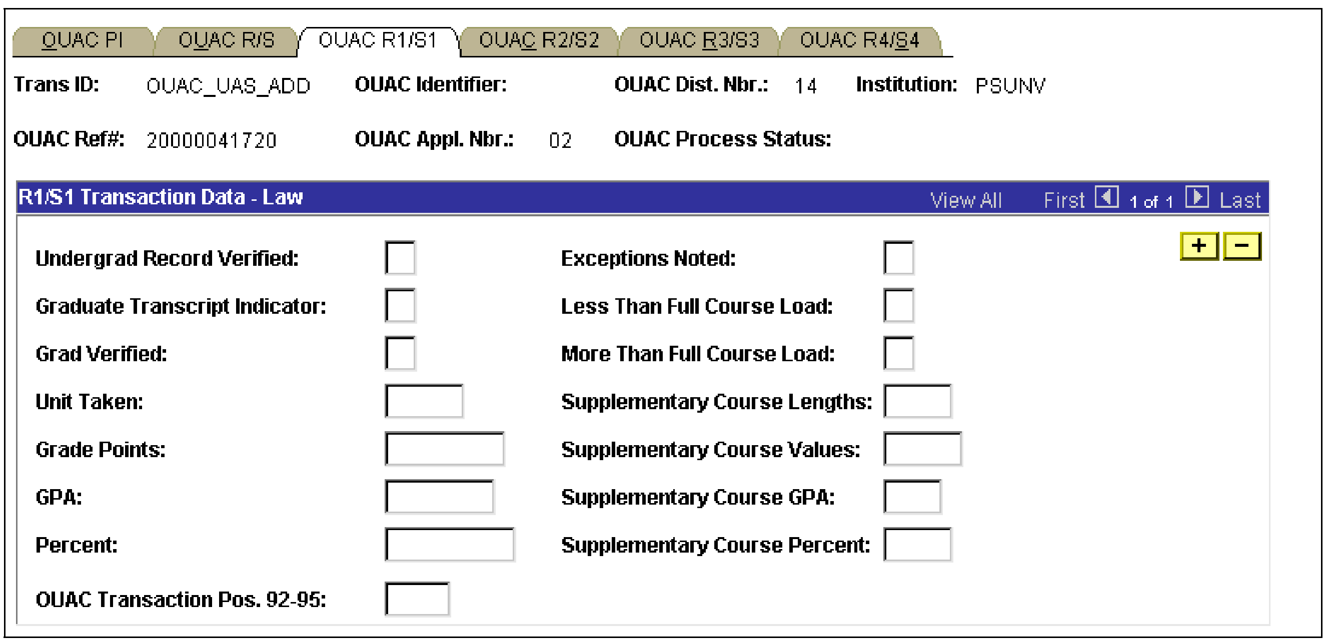
Access the OUAC R/S page.



OUAC R/S page

Reviewing OUAC Transactions R1/S1

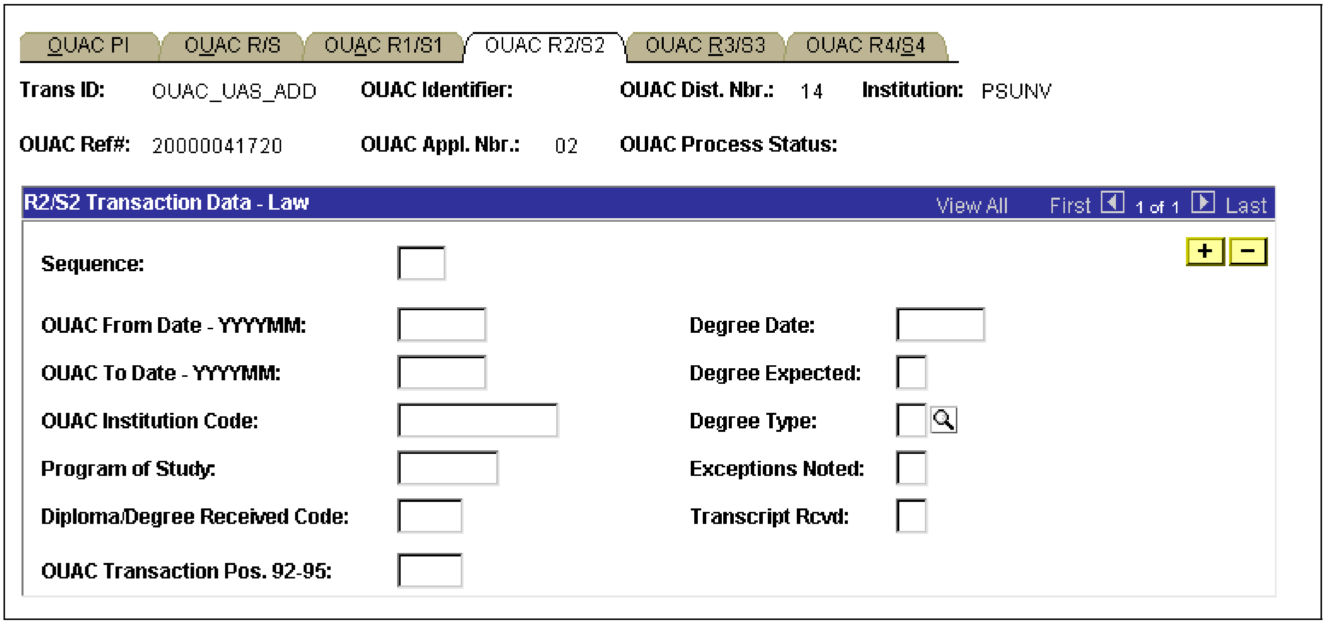
Access the OUAC R1/S1 page.



OUAC R1/S1 page

Reviewing OUAC Transactions R2/S2

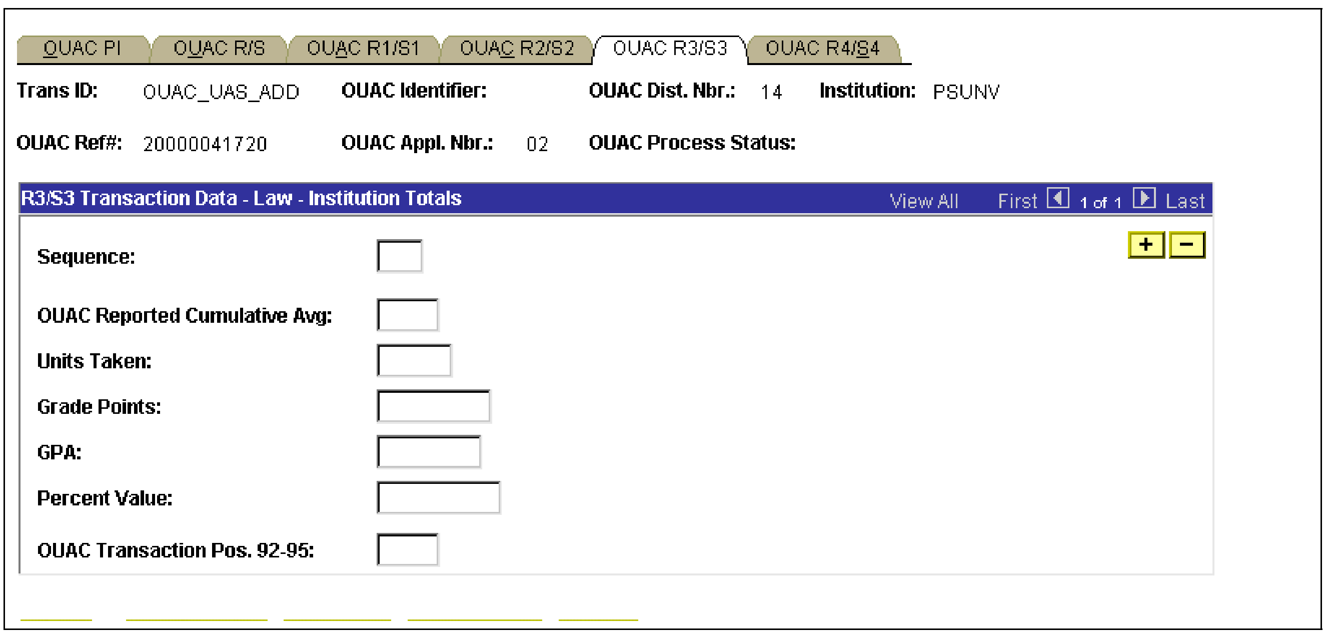
Access the OUAC R2/S2 page.



OUAC R2/S2 page

Reviewing OUAC Transactions R3/S3

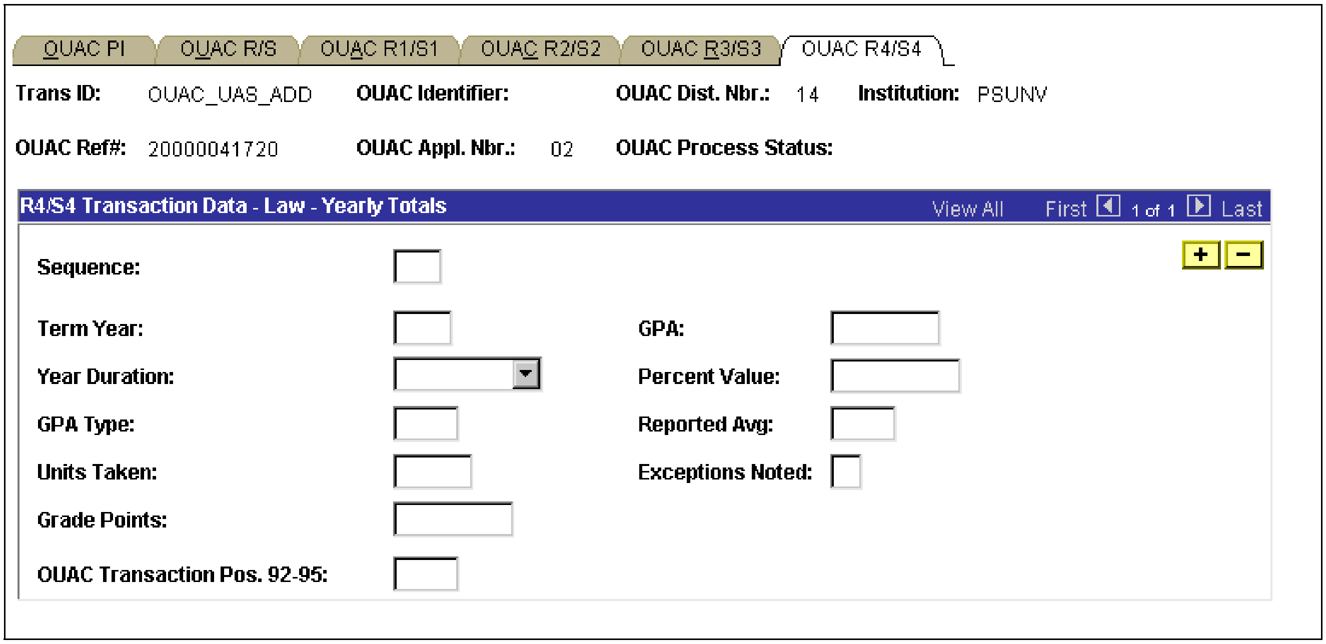
Access the OUAC R3/S3 page.



OUAC R3/S3 page

Reviewing OUAC Transactions R4/S4

Access the OUAC R4/S4 page.



OUAC R4/S4 page

Reviewing and Editing the OUAC Transaction T Staging Table

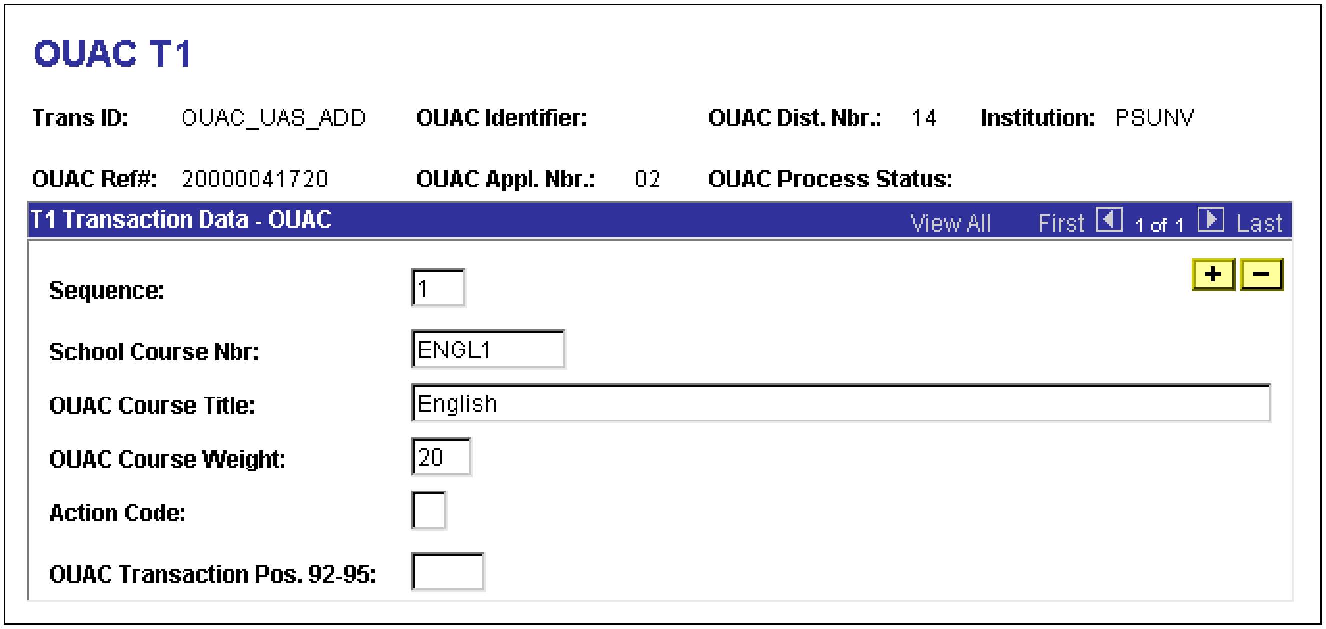
This section discusses how to use the OUAC T1 page to review and edit OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction T Staging Table

Page Name	Object Name	Navigation	Usage
OUAC T1	OUAC_T1_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Transactions T, OUAC T1	Review and edit OUAC transaction data.

Using the OUAC T1 Page

Access the OUAC T1 page.



OUAC T1 page

Viewing Search/Match and OUAC Processing Statuses

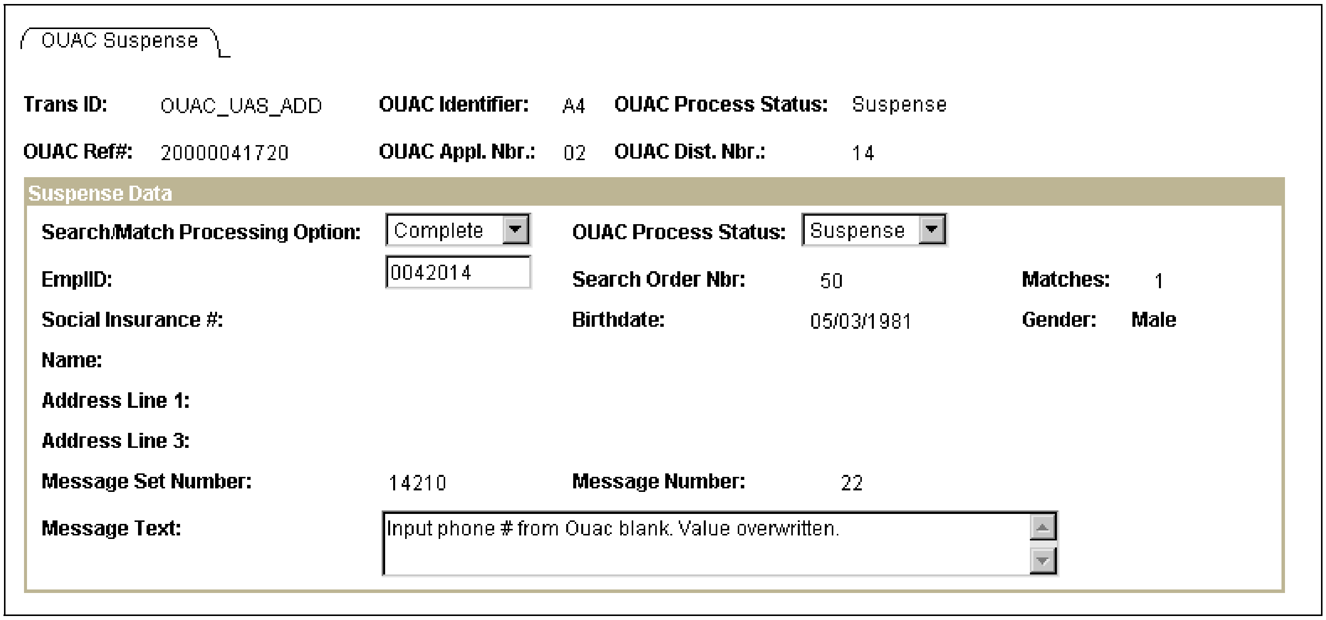
This section discusses how to use the OUAC Suspense page to view the status of an OUAC application record, and to view messages when generated by the posting process.

Page Used to View Search/Match and OUAC Processing Statuses

Page Name	Object Name	Navigation	Usage
OUAC Suspense	OUAC_SUSP_PNL	Develop Enrollment, Process External Data, Use G-Z, OUAC Suspense Entries, OUAC Suspense	View the status of an OUAC application record, and to view messages when generated by the posting process. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.

Using the OUAC Suspense Page

Access the OUAC Suspense page.



OUAC Suspense page

Search/Match Processing Option

Displays the status of the record after the Search/Match process.

Complete: The process was completed without errors.

Error: The process encountered errors.

Perform: The process has not run yet.

OUAC Process Status

Select the status you want for this record. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. The delivered values are *EDI Loaded, Loaded, Posted, Reviewed,* and Suspense. For example, you could change the status to *Loaded,* and the next time you run the post process this record would post to the database—because the post process posts any file with a status of *Loaded.* If you do not want the record to remain in suspense status and do not want to post it to the database at a later date, select *Reviewed.*

ID

Select an ID to merge this record with an existing ID type. If the system suspended the record after it performed the search and discovered a match for one ID, that ID displays here.

If the system finds more than one match, the search order number appears and the number of matches appear in the Matches display-only field.

Posting OUAC Transaction Data

This process picks up all the transactions in Loaded status and posts the data to the PS Core tables. It creates separate applications for each OUAC reference number/application number that is not a 101 applicant. For 101 applicants it creates separate program numbers.

To post OUAC transaction data:

- Set search parameters for posting.
- Set OUAC post parameters.
- Set defaults for posting OUAC data.
- Set more post parameters.

Pages Used to Post OUAC Transaction Data

Page Name	Object Name	Navigation	Usage
OUAC Post Parms (OUAC post parameters)	OUAC_POST_PARMS	Develop Enrollment, Process External Data, Proc G-R, OUAC Post Process, OUAC Post Parms	Define default values for admit type, application center, academic career, and campus.
OUAC Post Parms2 (OUAC post parameters2)	OUAC_POST_PARMS2	Develop Enrollment, Process External Data, Proc G-R, OUAC Post Process, OUAC Post Parms2	Define application and transcript posting defaults.
OUAC Post Parms BC (OUAC post parameters BC)	OUAC_POST_PARMS_BC	Develop Enrollment, Process External Data, Proc G-R, OUAC Post Process, OUAC Post Parms BC	Assign transcript status values.

Setting Search Parameters for Posting OUAC Data

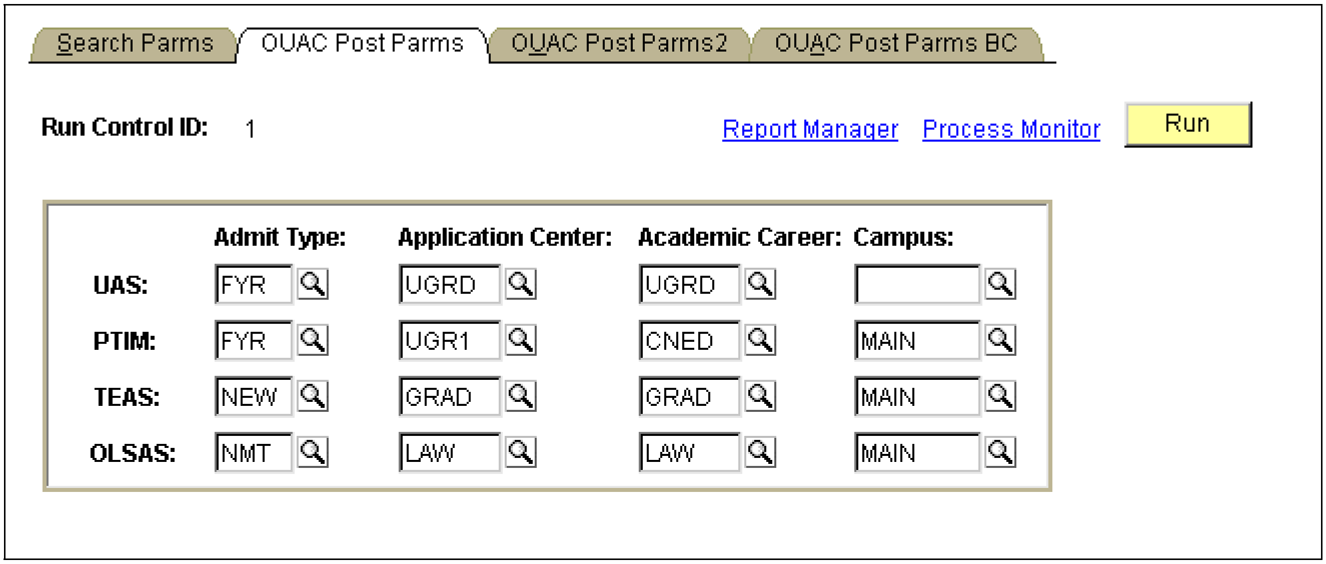
Use the Search Parms (search parameters) page to set up your search/match parameters for processing the OUAC staging tables.

See Also

Chapter 15, “Performing EDI TS130 Transcript Transactions,” Setting Up Search/Match Parameters, page 235

Setting OUAC Post Parameters

Access the OUAC Post Parms (OUAC post parameters) page.



OUAC Post Parms page

Admit Type

Select the default admit type for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The admit type that you enter here is the default on the Application Data page (the ADM_APPL_DATA record). Define admit types on the Admit Types Table page.

Application Center

Select the default application center for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The application center that you enter here is the default on the Application Data page (the ADM_APPL_DATA record). Define application centers on the Application Center Table page.

Academic Career

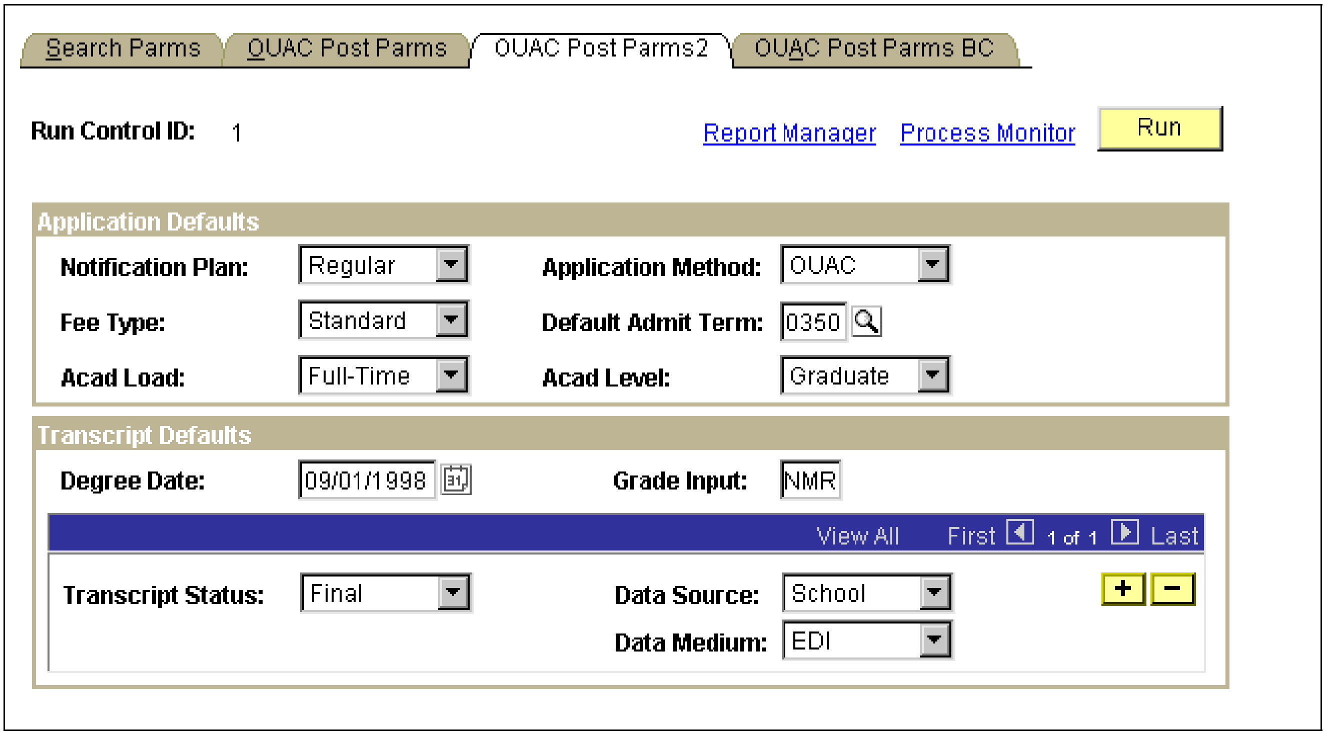
Select the default academic career for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The academic career that you enter here is the default in the ADM_APP_CAR_SEQ record. Define academic careers on the Academic Career Table page.

Campus

Select the default campus for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The campus that you enter here is the default on the Application Program page (the ADM_APPL_PROG record). If you do not select a campus here, the default is the default campus attached to the applicant's academic program. Define campuses on the Campus Table page.

Setting Defaults for Posting OUAC Data

Access the OUAC Post Parms2 (OUAC post parameters2) page.



OUAC Post Parms 2 page

Notification Plan
Select the notification plan that you want entered for these applications during the posting process. A notification plan specifies whether this person should be on a regular or special notification track. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Early Admt* (early admit), *Regular,* and *Rolling.*

Application Method
Select the application method you want entered for these applications during the posting process. Application methods indicate how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Appl Serv* (application server), *Diskette, EDI* (electronic data interchange), *Hard Copy, OUAC* (Ontario Universities Application Center), *Web Appl* (web application).

Fee Type
Select the fee type you want entered for these applications during the posting process. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Internatnl* (international) and *Standard.*

Default Admit Term
Select a default admit term for OUAC transactions that transmit term information without a term date. Term Date is a required field in PeopleSoft applications.

Acad Load (academic load)
Select the academic load you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.

Acad Level (academic level) — Select the academic level you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.

Degree Date — Select a default degree date for OUAC transactions that transmit degree information without a degree date. Degree Date is a required field in PeopleSoft applications.

Grade Input — Enter a default grade for OUAC transactions that transmit courses without a grade. Grade is a required field in PeopleSoft applications.

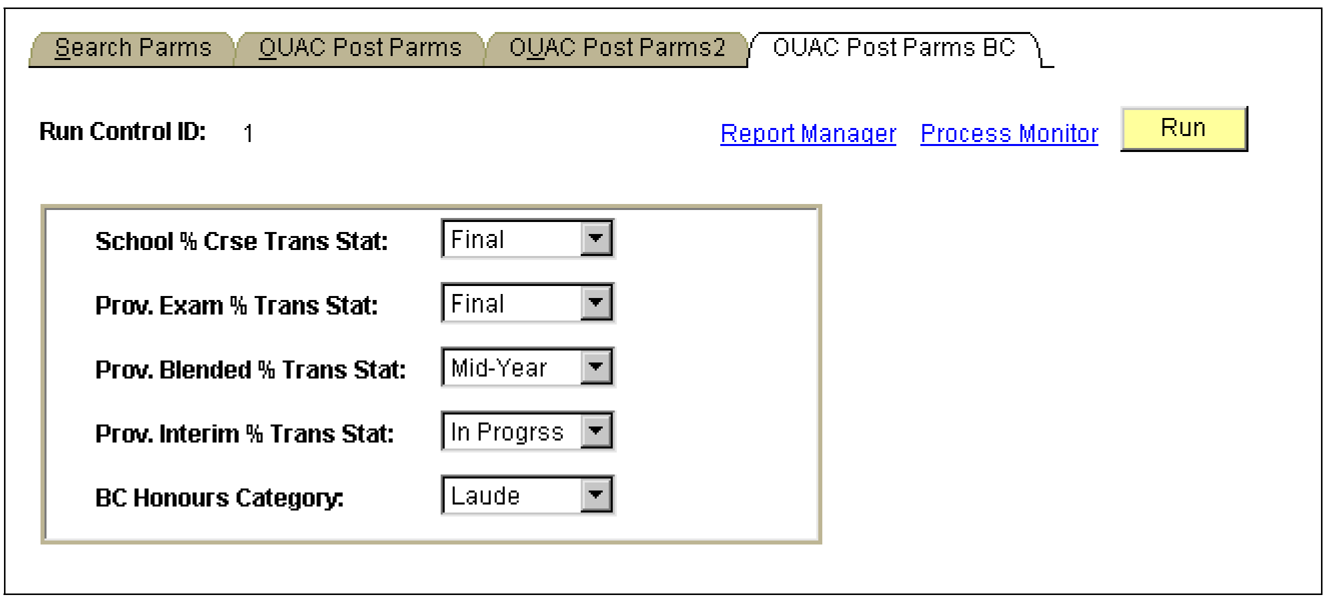
Transcript Status — Select a transcript status. The data source and data medium that you select is defaults for the transcript status that you select here. Insert rows to add subsequent transcript statuses.

Data Source — Select a default data source for the transcript status in this row of data.

Data Medium — Select a default data medium for the transcript status in this row of data.

Setting More Post Parameters

Access the OUAC Post Parms BC (OUAC post parameters BC) page.



OUAC Post Parms BC page

School % Crse Trans Stat (school % course translate status) — Assign a transcript status to the final percentage assigned by the school.

Prov. Exam % Trans Stat (province exam % translate status) — Assign a transcript status to the exam percentage assigned by the province.

Prov. Blended % Trans Stat (province blended % translate status) — Assign a transcript status to the blended percentage.

Prov Interim % Trans Stat (province interim % translate status)
Assign a transcript status to the interim percentage assigned by the school.

BC Honours Category
Enter a default for applicants who have earned honors standing. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Laude, Magna, None,* and *Summa.*

Note. If you assign the same transcript status to the percentage fields above, the incoming marks data does not create a new row, but, instead, overwrites the old one. Assigning a different transcript status to these fields ensures that marks are populated correctly.

Viewing OUAC Messages

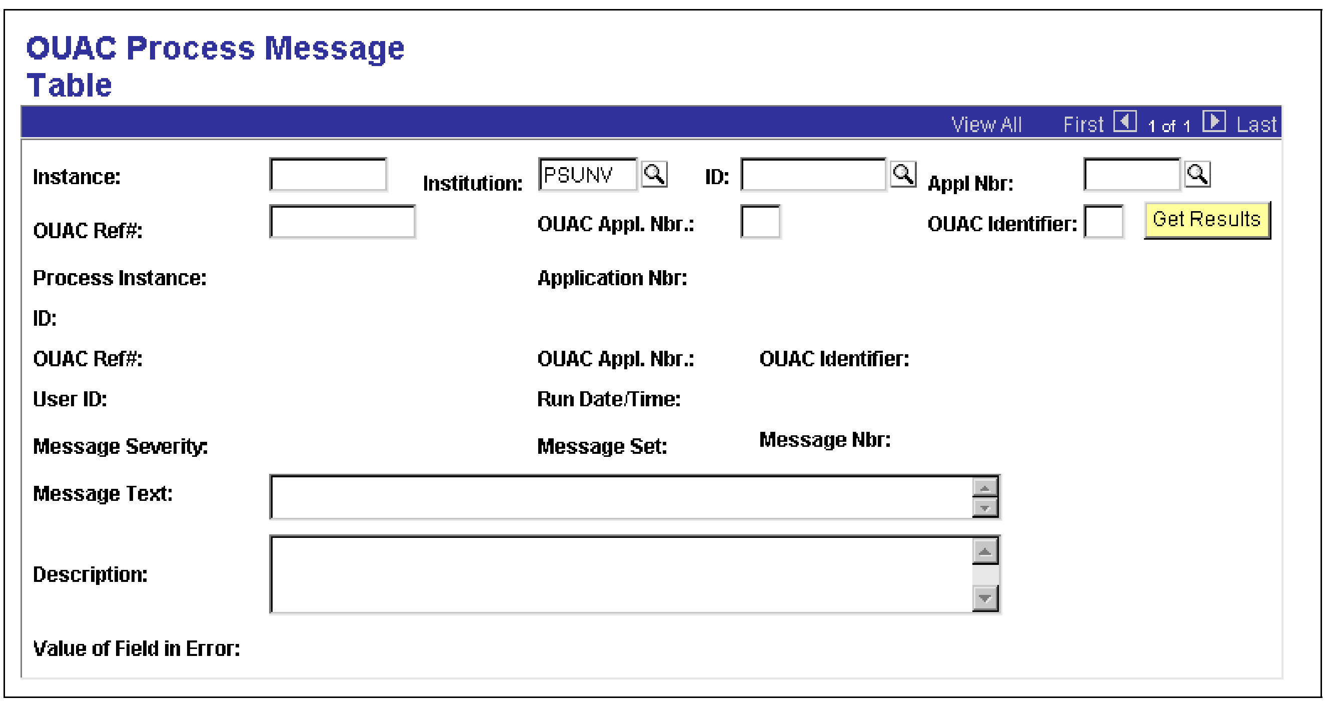
This section discusses how to view OUAC messages.

Page Used to View OUAC Messages

Page Name	Object Name	Navigation	Usage
OUAC Process Messages Table	OUAC_PRCS_MSG_TBL	Develop Enrollment, Process External Data, Inquire, OUAC Messages, OUAC Process Message Table	View errors generated during the posting process.

Using the OUAC Messages Page

Access the OUAC Process Message Table page.



OUAC Process Message Table page

Select the following criteria for which you want to search for OUAC process messages: *Instance, Institution, ID, Appl Nbr* (application number), *OUAC Ref#* (OUAC reference number) *OUAC Appl Nbr*(OUAC application number), *OUAC Identifier.*

Reviewing Overflow OUAC Application Information

Use the OUAC Application Data component to view overflow OUAC data. The data that appears in this component have no natural home in PeopleSoft core tables, which is why the data appears here. Thus, for students posted through OUAC, the OUAC Application Data component is an extension of their application.

To review overflow OUAC application information:

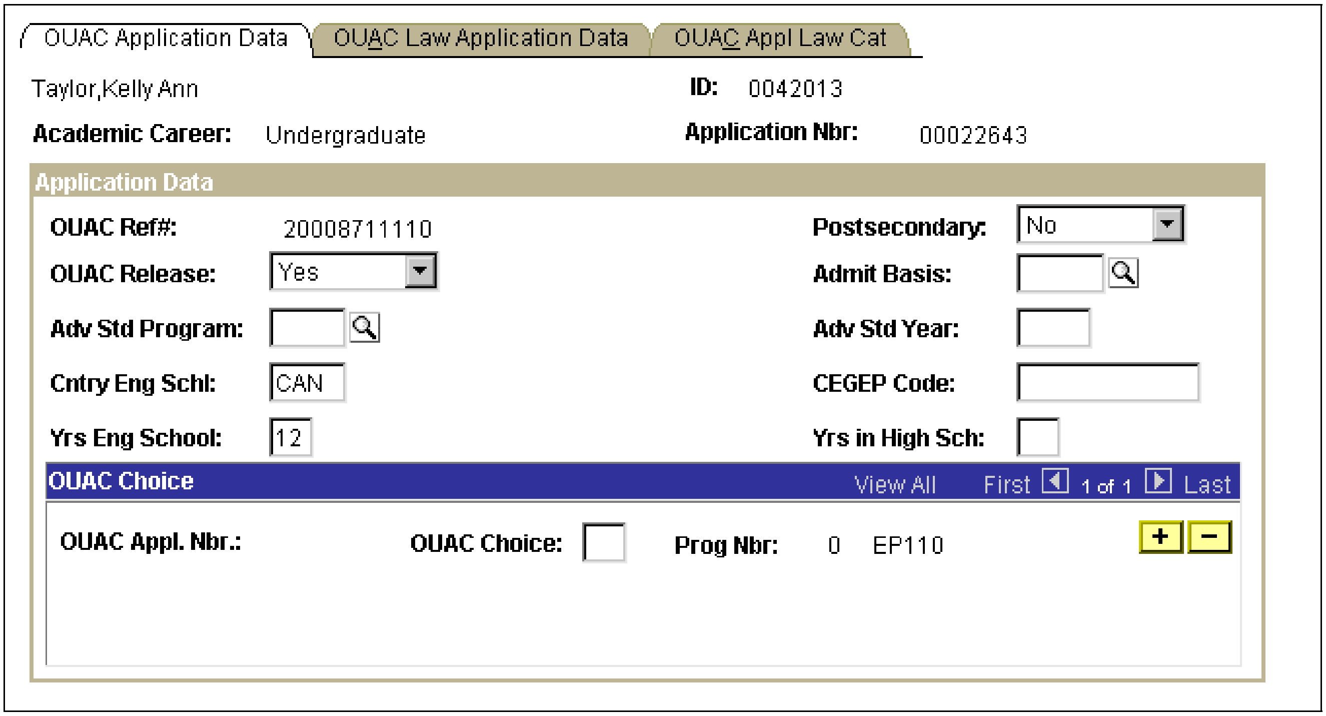
- Review general OAUC application data.
- Review OUAC law application information.
- Review OUAC law categories.

Pages Used to Review Overflow OUAC Application Information

Page Name	Object Name	Navigation	Usage
OUAC Application Data	OUAC_APPL_DATA	Develop Enrollment, Process Applications, Use, OUAC Application, OUAC Application Data	View overflow OUAC application data.
OUAC Law Application Data	OUAC_APPL_DATA_LAW	Develop Enrollment, Process Applications, Use, OUAC Application, OUAC Law Application Data	Review overflow OUAC law application data.
OUAC Appl Law Cat (OUAC application law category)	OUAC_APPL_LAW_CAT	Develop Enrollment, Process Applications, Use, OUAC Application, OUAC Appl Law Cat	View OUAC law categories.

Reviewing General OUAC Application Data

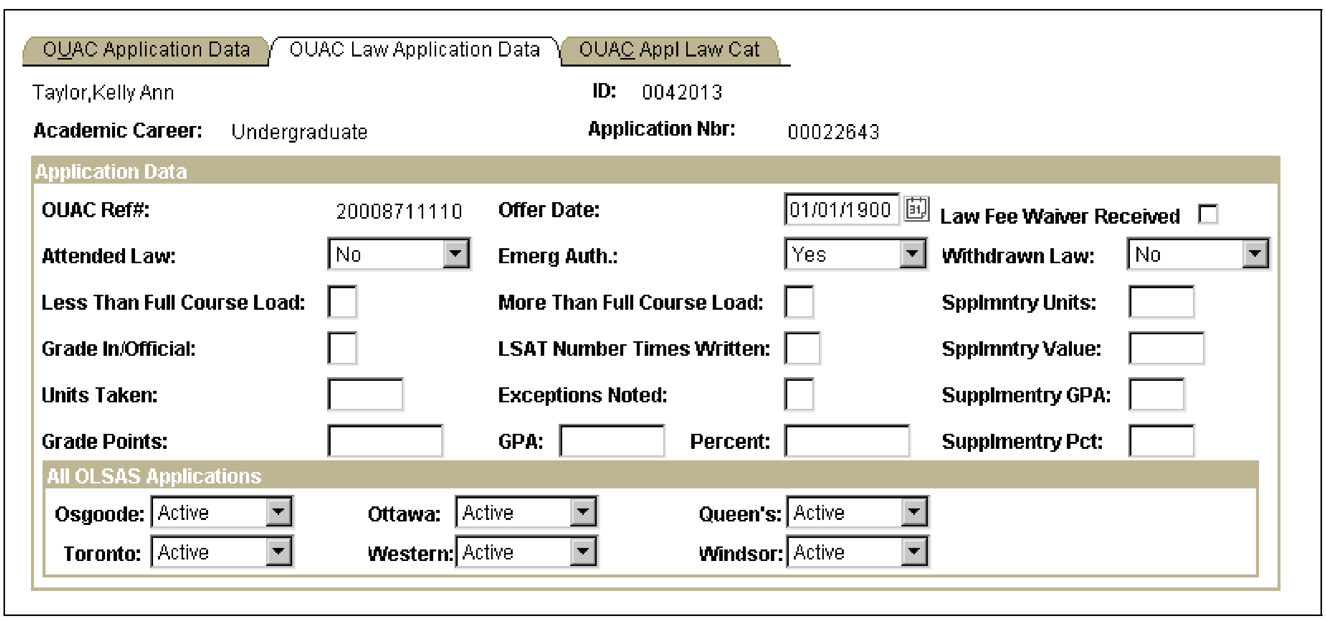
Access the OUAC Application Data page.



OUAC Application Data page

Reviewing OUAC Law Application Information

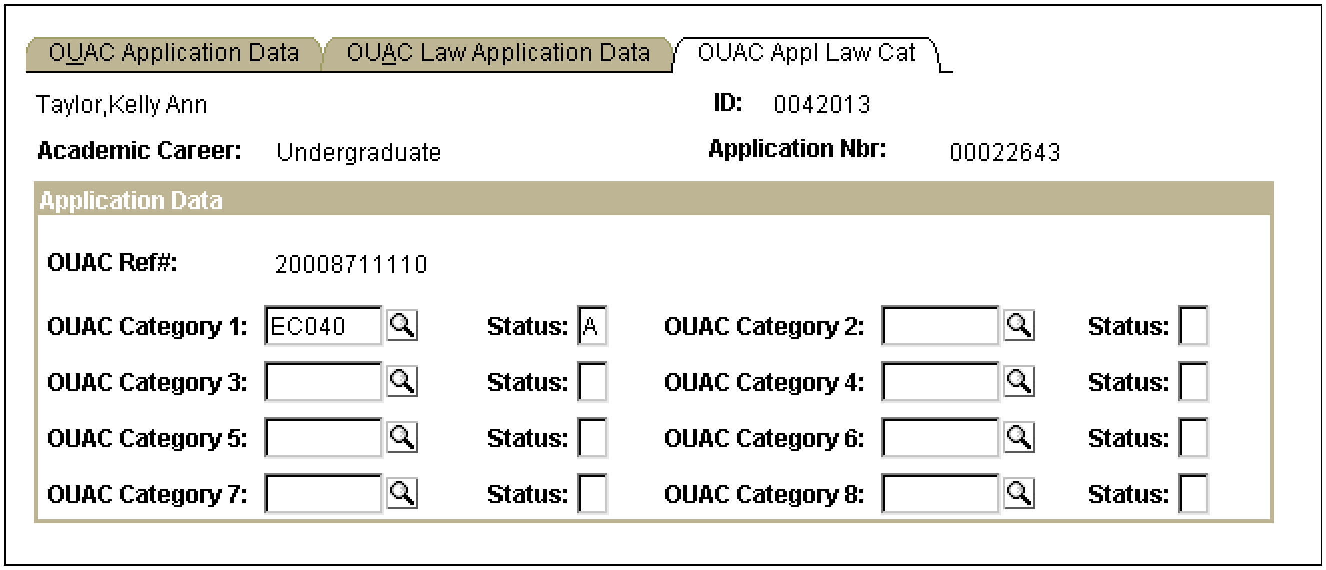
Access the OUAC Law Application Data page.



OUAC Law Application Data page

Reviewing OAUC Law Categories

Access the OUAC Appl Law Cat page.


OUAC Application Data | OUAC Law Application Data | OUAC Appl Law Cat

Taylor,Kelly Ann **ID:** 0042013

Academic Career: Undergraduate **Application Nbr:** 00022643

Application Data

OUAC Ref#: 20008711110

OUAC Category 1: EC040	**Status:** A	**OUAC Category 2:**	**Status:**
OUAC Category 3:	**Status:**	**OUAC Category 4:**	**Status:**
OUAC Category 5:	**Status:**	**OUAC Category 6:**	**Status:**
OUAC Category 7:	**Status:**	**OUAC Category 8:**	**Status:**

OUAC Appl Law Cat page

CHAPTER 19

Evaluating Applicants

Once you have entered all the necessary information for an applicant, you are ready to evaluate the applicant and related application materials.

This chapter provides an overview of the evaluating applicants business process and discusses how to:

- Create general evaluations.
- Enter and update general evaluator ratings.
- Create application evaluations.
- Enter and update evaluator ratings for an application.

Understanding the Evaluating Applicants Business Process

This section lists prerequisites and discusses the evaluating applicants business process.

Prerequisites

Before you begin evaluating applicants, applications must be fully entered into your system. Depending on your office procedures, you will add evaluations at different times during the year. Although not all of the following information is required to run evaluations, the following list can serve as an overview of the pertinent data that can be entered, and thus considered, for an application:

- Applicant demographics.
- Applicant address.
- Application program data.
- Application data.
- Application recruiting data.
- External education data.
- Test results.
- General materials.
- Application materials.
- Early financial aid offer information.

Evaluating Applicants Business Process

There are many ways you can use your system to evaluate applicants. PeopleSoft Recruiting and Admissions provides SQR processes that enable you to automate much of your business process. You can also use PeopleSoft Recruiting and Admissions to evaluate applicants manually. In fact, many combinations of manual and automated processes can work. Therefore, before evaluating applicants, decide how you want to use your system to evaluate applicants.

Regardless of whether you choose to evaluate applicants manually, through SQR processes, or through a combination of manual and automated processing, you must define rating schemes and the rating components that make up rating schemes. You must also define evaluation codes, evaluation committees (if applicable to your evaluation business process), and evaluation status codes. These steps are discussed more fully in the setting up section of this chapter.

Once you have set up the process for evaluating applicants, you are ready to perform the evaluations. This is where you have the most options regarding manual processing versus automatic processing. Performing applicant evaluations involves assigning evaluation codes to applicants, linking materials (such as recommendations, essays, portfolios, and so forth) to applications, assigning committees (which consist of the evaluators who physically evaluate the applicants), entering evaluator ratings, and retrieving and evaluating objective ratings (such as test scores and GPA) from the applications. You can perform many of these steps manually or through automatic processes. These steps are discussed more fully in the performing evaluations section of this chapter.

Once you have defined rating schemes, evaluation codes, committees, and evaluation statuses, you are ready to evaluate the applicants. Depending on the evaluation code/rating scheme structure that your institution uses, there are many ways to evaluate applicants. Therefore, this book limits the discussion to the tools that you can use to fulfill your specific needs. These tools include:

- General evaluations and general evaluator ratings.
- Application evaluations and application evaluation ratings.
- An automated method for assigning evaluation components.
- An SQR process for linking application materials to applications.
- An SQR process for entering rating values.
- An SQR process for evaluating applicants based on rating values, and for updating application evaluation statuses.
- A COBOL process for calculating enrollment deposits.
- A COBOL process for activating applicants as students.

Use these tools to assign evaluation codes to applications, to enter and retrieve rating component values, to enter or have the system calculate overall rating values, to evaluate the applicant based on those overall rating values, and to update the applicant's program status.

Automatic Versus Manual Processing

The following table presents the steps that can be performed manually or automatically:

Task	To execute automatically	To execute manually
Assign evaluation codes.	ADEVALCD.SQR	General Evaluations component or Application Evaluations component.
Link application materials.	ADMTEXT.SQR	Application Materials page.
Enter rating values for rating schemes and rating components.	For objective rating components: Evaluation Calculation process ADMTLRTG.SQR	For subjective rating components: General Evaluator Rating component or Application Evaluator Ratings component.
Evaluate applicants based on rating values, and update application evaluation statuses.	Application Status Update (ADMTLPGS.SQR)	General Evaluations component or Application Evaluations component.
Calculate enrollment deposits.	When you update application evaluation statuses in batch: SFPBADEP (COBOL SQL)	Click the Calculate Deposit Fees link on the Application Program Data page.
Activate applicants as students.	When you update application evaluation statuses in batch: ADPCPPRC (COBOL SQL)	Application Program Data page in the Application Maintenance component.

Your institution can rename the processes listed in the above table. You can also add to or edit the SQCs for the SQRs listed above. Check with your system administrator for more information about the specific SQRs and SQCs used by your institution.

General Versus Application Evaluations

To assign evaluation codes manually, you must create an evaluation for each applicant. There are two sets of components that you can use to create evaluations for an applicant.

- Use the General Evaluations and General Evaluator Ratings components to create *general* evaluations.

  General evaluations are *not* tied to a career, program, or application number. Therefore, use general evaluations to evaluate applicants on general criteria that are not required by a particular career or program (such as a statement of purpose that the institution requires, regardless of the career or program the person is applying to). In addition, because general evaluations are not tied to application numbers, you can use general evaluations to evaluate individuals (such as prospects) without having to enter an application.

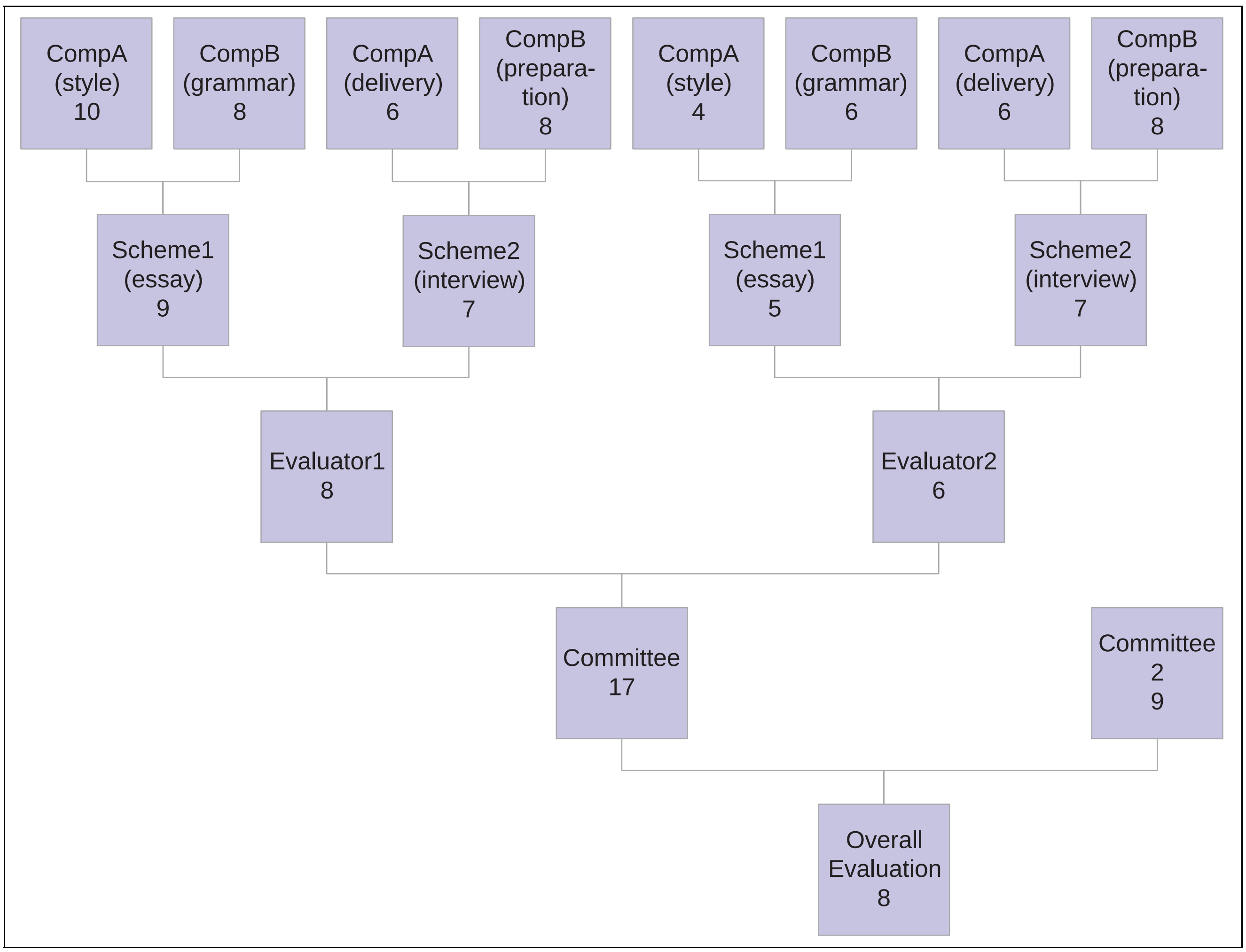
- Use the Application Evaluations and Application Evaluator Ratings component to create *application* evaluations.

  Application evaluations are tied to a career, program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the career and program to which they are applying.

You can evaluate an applicant using both of these sets of components if you desire. You would also use these components to enter ratings. You can enter the ratings manually, or you can use the Application Evaluation process to retrieve and evaluate objective scores, and then enter rating values. If you enter ratings manually, you would use the Application or General Evaluator Rating page. If the Application Evaluation process retrieves the ratings, they would appear on the Overall Ratings page in the Application Ratings component.

Understanding Automatic Overall Rating Calculation

Your PeopleSoft Recruiting and Admissions application is equipped with a background process that averages evaluator ratings and overall ratings. Therefore, you only have to manually enter rating values at the rating component level. The system averages those ratings and populate overall ratings at the next higher level. The system continues to average overall ratings until you have an overall rating for the application. The following chart illustrates the hierarchical structure of this background process:



Illustrating the hierarchical structure

You must first enter rating component rating values. The system then calculates the overall rating value for the scheme. Once all of the overall rating values for the scheme have been calculated, the system calculates the overall rating value for the evaluator, and so on.

For example, suppose you assigned two committees to evaluate an applicant. One committee is to evaluate essays and interviews, and the second committee is to evaluate other materials (for simplicity we will not look at the details of the second committee). The first committee consists of two committee members (or evaluators). Each evaluator evaluates two schemes (undergraduate essay and undergraduate interview) with two components within each scheme (style and grammar and delivery and preparation).

1. First, the evaluator enters ratings for each *component* in each scheme.

   In the example in the diagram above, the first evaluator entered 10 for style and 8 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. The second evaluator entered 4 for style and 6 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. For the system to calculate the averages, you must enter values at this level first.

2. When the evaluators saved the pages, the system calculates the averages for each *scheme* and populates the Overall Rating fields on the General Evaluator Rating page or the Application Evaluator Rating page, depending on the type of evaluation.

   In our example, the overall rating for the first scheme for Evaluator1 is 9 (the average of 10 and 8), and the overall rating for the second scheme for Evaluator1 is 7 (the average of 6 and 8). The overall rating for the first scheme for Evaluator2 is 5 (the average of 4 and 6), and the overall rating for the second scheme for Evaluator2 is 7 (the average of 6 and 8).

3. After each scheme has an overall rating value, the system populates the overall rating for the *evaluator* (once you save the page) and populates the Overall Rating field on the Evaluator Rating Page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

   In our example, the overall rating for Evaluator1 is 8 (the average of 9 and 7), and the overall rating for Evaluator2 is 6 (the average of 5 and 7).

4. After each evaluator has an overall rating value, the system populates the overall rating for the *committee* (once you save the page) and populates the Overall Rating field on the Evaluation Committee page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

   In our example, the overall rating for Committee1 is 7 (the average of 8 and 6), and let's say that the overall rating for Committee2 is 9.

5. After each committee has an overall rating value, the system populates the overall rating for the application (once you save the page) and populates the Overall Rating field on the General Evaluation or Application Evaluation page, depending on the type of evaluation.

   In our example, the overall rating for the application is 8 (the average of 7 and 9).

Remember that you must start at the first step. If you manually enter overall ratings for a scheme, for instance, without entering components, you will break the chain and the system will not calculate averages at any level. In other words, the system only calculates overall ratings at any given level if it had calculated the overall ratings at every level below that one.

Creating General Evaluations

This section discusses how to:

- Assign an evaluation code to a general evaluation.
- Link general materials to an application.

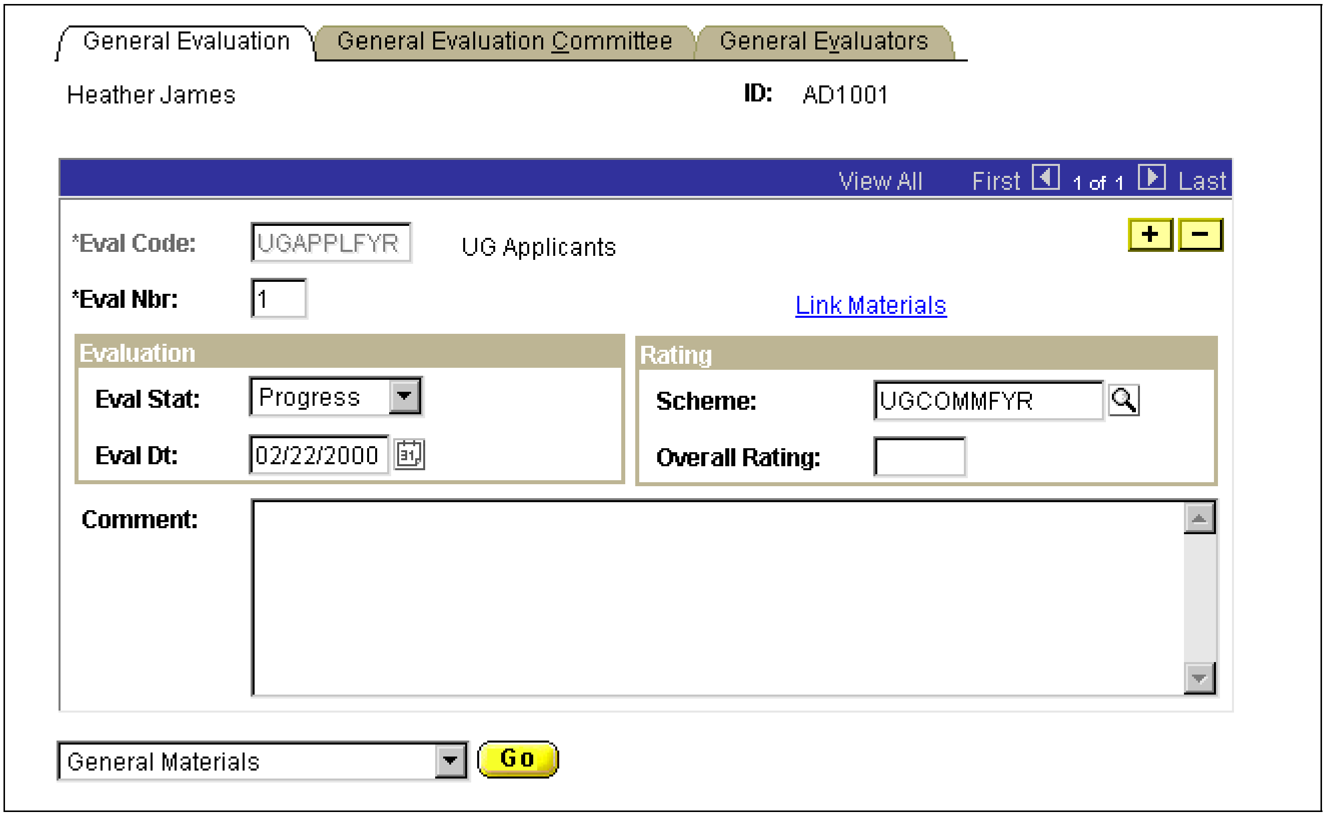
- Assign a committee to a general evaluation.
- Assign evaluators to a general evaluation.

Pages Used to Create General Evaluations

Page Name	Object Name	Navigation	Usage
General Evaluation	GENL_EVAL1	• Develop Enrollment, Evaluate Applicants, Use, General Evaluations, General Evaluation • Develop Enrollment, Recruit Prospective Students, Use, General Evaluations, General Evaluation	Assign evaluation codes and to enter high level, general information about a person. The evaluation code populates various fields in this component with default information (such as rating schemes and committees). You can also link general materials to an evaluation from this page.
Select General Materials	GENL_MATL_POPUP	Click the Link Materials link on the General Evaluation page.	Link general materials to an application.
View Assigned Materials	MATL_EVAL_POPUP	Click the appropriate Detail button on the Select General Materials page.	View details about a Material Type.
General Evaluation Committee	GENL_EVAL2	• Develop Enrollment, Evaluate Applicants, Use, General Evaluations, General Evaluation Committee • Develop Enrollment, Recruit Prospective Students, Use, General Evaluations, General Evaluation Committee	Assign general evaluation committees to a general evaluation. The overall ratings of the committees you assign are also stored on this page.
General Evaluators	GENL_EVAL3	• Develop Enrollment, Evaluate Applicants, Use, General Evaluations, General Evaluators • Develop Enrollment, Recruit Prospective Students, Use, General Evaluations, General Evaluators	Assign evaluators to a general evaluation, and to record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to a General Evaluation

Access the General Evaluation page.



General Evaluation page

Eval Code (evaluation code)
: Select the evaluation code to be used to evaluate this person. Other fields on this page (such as Scheme) populate according to the evaluation code you select. This is where you assign evaluation codes to evaluations manually. Define evaluation codes on the Evaluation Table page.

Eval Nbr (evaluation number)
: The evaluation number default is *1* for the first general evaluation you enter, *2* for the second, and so on.

Eval Stat (evaluation status)
: Select the evaluation status reflecting the current status of this general evaluation. Define evaluation status codes on the Evaluation Status Table page.

Eval Dt (evaluation date)
: The default for the evaluation date is your system date.

Scheme
: Select the rating scheme you want to use for this general evaluation. If the evaluation code entered on this page is linked to a committee rating ID scheme, that scheme appears automatically. Define rating schemes on the Rating Scheme Table page.

Overall Rating
: If you are using rating schemes, and if you entered all the evaluator ratings for every committee linked to this person, this value appears automatically. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each committee are stored on the General Evaluation Committee page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applicants and prospects, you can enter an overall rating manually.

See Chapter 19, "Evaluating Applicants," Evaluating Applicants Business Process, page 354.

Note. This value does not include rating values that were retrieved and calculated by the Evaluation Calculation process.

Link Materials

Click this link to link general materials to this general evaluation. This link is available only after you save the page, provided there are general materials stored for this person. You can only choose from the general materials that are linked to this person. The Select General Materials Page appears.

View Materials

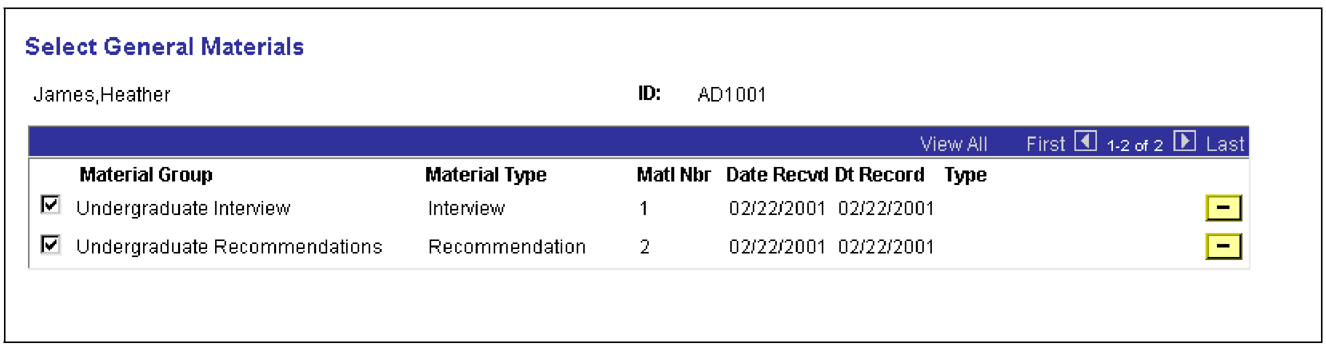
Click this link to view the general materials that are linked to this general evaluation. This link is available once you save the page, provided that you have linked materials to this general evaluation on the Select General Materials page. The View Assigned Materials Page appears.

Go

Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Linking General Materials to an Application

Access the Select General Materials page.



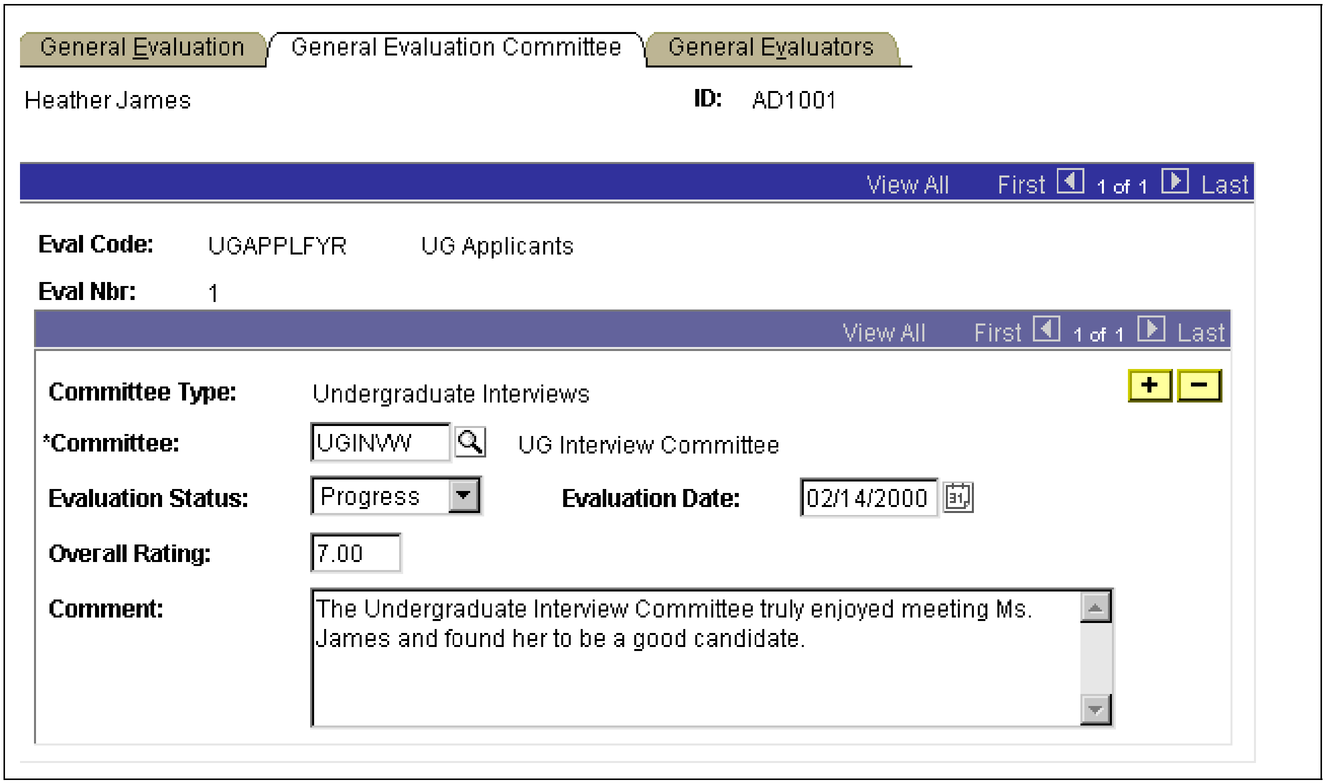
Select General Materials page

Material Types

Select the material types you want to link to this evaluation.

Assigning a Committee to a General Evaluation

Access the General Evaluation Committee page.



General Evaluation Committee page

Committee Type

The committee type of the committee that you select appears.

Committee

The system populates the committee if the evaluation code for this general evaluation has an evaluation committee assigned to it. You can add committees if desired.

Note. To create general evaluations, you must assign an evaluation committee. However, an evaluation committee can be made up of only one person.

Evaluation Status

Select the evaluation status reflecting the current status of this committee's evaluation. Define evaluation status codes on the Evaluation Status Table page.

Evaluation Date

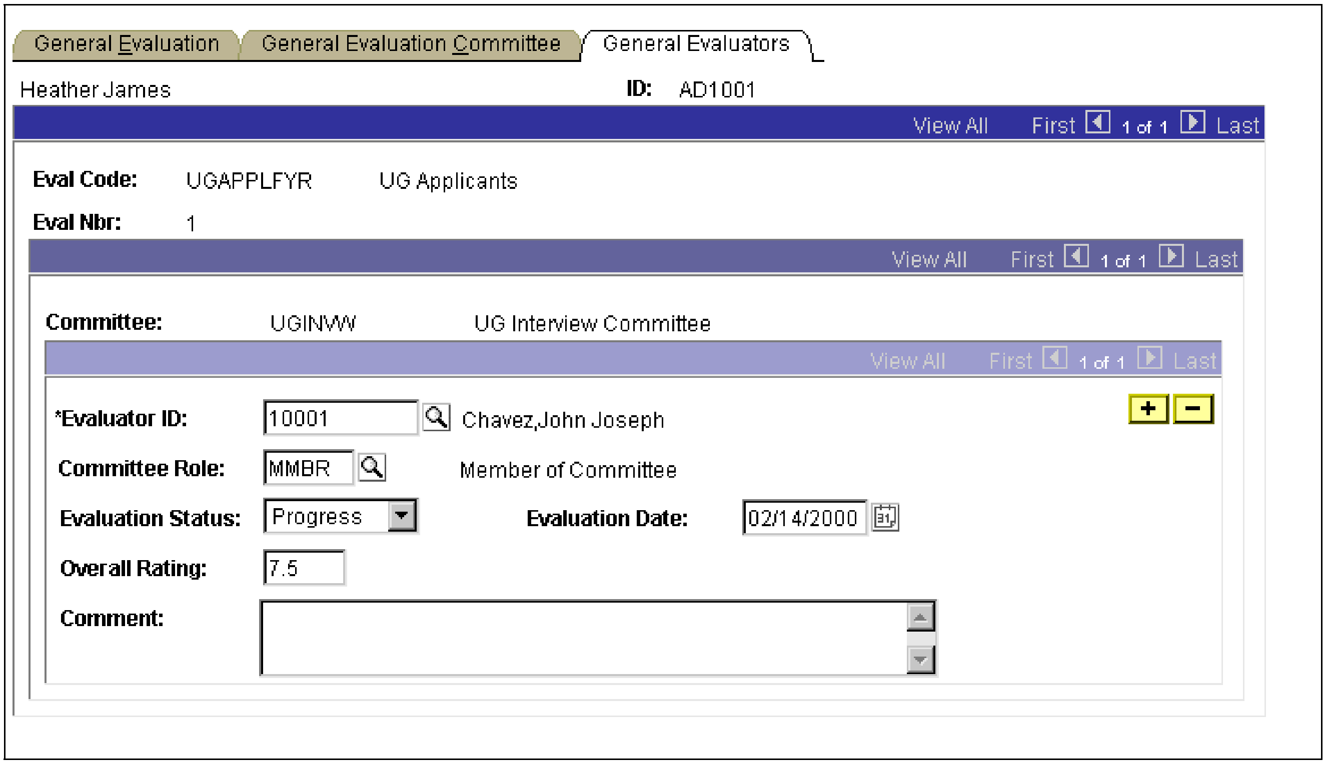
The default for the evaluation date is the system date.

Overall Rating

The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator in this committee assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applicants, you can enter an overall rating manually.

Assigning Evaluators to a General Evaluation

Access the General Evaluators page.



General Evaluators page

Evaluator ID

Select an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the General Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.

Note. You cannot enter evaluators under an evaluation code unless you have first entered a committee on the General Evaluation Committee page.

Committee Role

Select the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.

Evaluation Status

Select the evaluation status reflecting the current status of this evaluator's evaluation. Evaluation status codes are set up on the Evaluation Status Table page.

Evaluation Date

The default for the evaluation date is your system date.

Overall Rating

The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the General Evaluator Rating page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applicants or prospects, you can enter an overall rating manually.

See Also

Performing the Evaluating Applicants Business Process

Entering and Updating General Evaluator Ratings

Use the General Evaluator Ratings component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applicants based on rating schemes.

This section discusses how to:

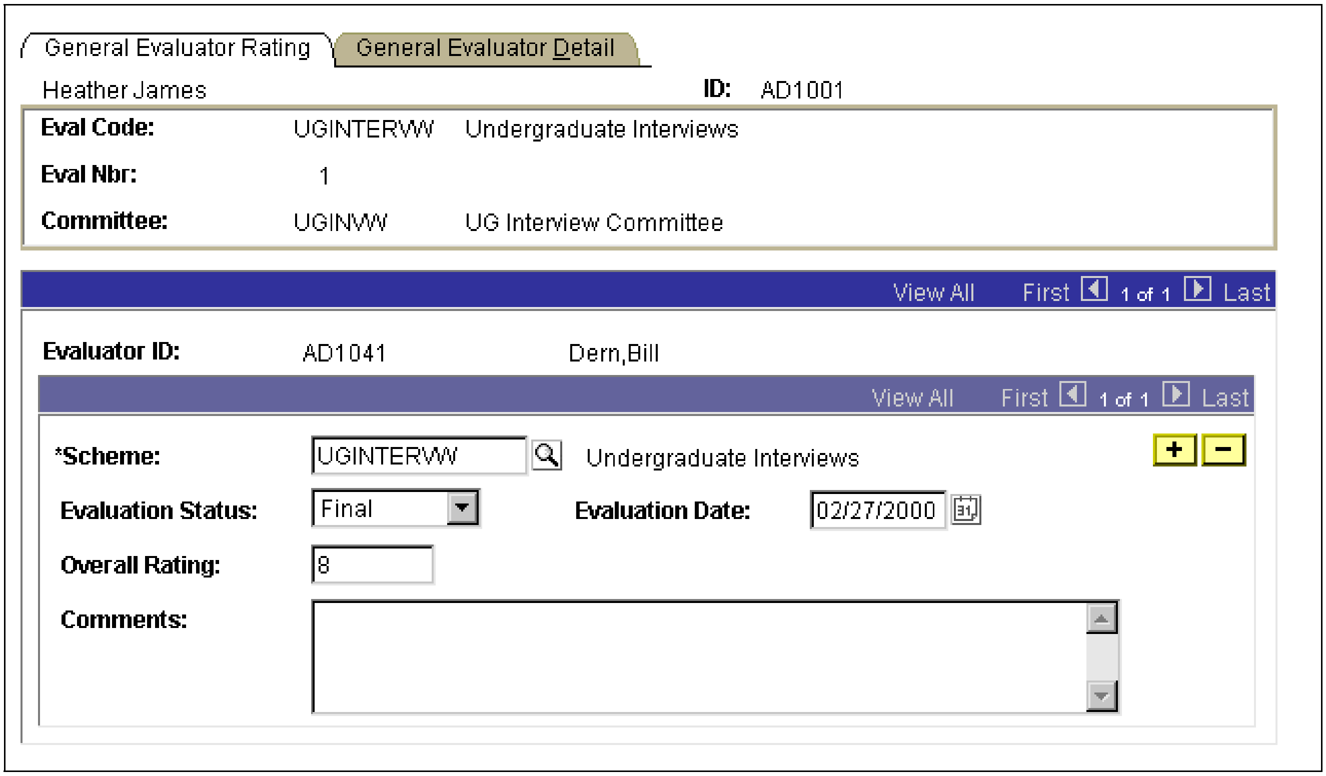
- Enter and update general evaluator overall ratings.
- Enter and update general evaluator ratings of rating components.

Pages Used to Enter and Update General Evaluator Ratings

Page Name	Object Name	Navigation	Usage
General Evaluator Rating	GENL_RATING1	• Develop Enrollment, Evaluate Applicants, Use, General Evaluator Ratings, General Evaluator Rating • Develop Enrollment, Recruit Prospective Students, Use, General Evaluator Ratings, General Evaluator Rating	Enter general evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.) You have to first set up an applicant evaluation based on an evaluation code in the General Evaluations component.
General Evaluator Detail	GENL_RATING2	• Develop Enrollment, Evaluate Applicants, Use, General Evaluator Ratings, General Evaluator Detail • Develop Enrollment, Recruit Prospective Students, Use, General Evaluator Ratings, General Evaluator Detail	Enter an evaluator's ratings of the components for a rating scheme. The system averages and displays the ratings entered here on the General Evaluator Rating page. You must first complete the General Evaluator Rating page.

Entering and Updating General Evaluator Overall Ratings

Access the General Evaluator Rating page.



General Evaluator Rating page

Scheme The system populates the rating scheme according to the rating scheme entered on the General Evaluation page for this evaluation code and for this person. You can add more than one rating scheme for an evaluator.

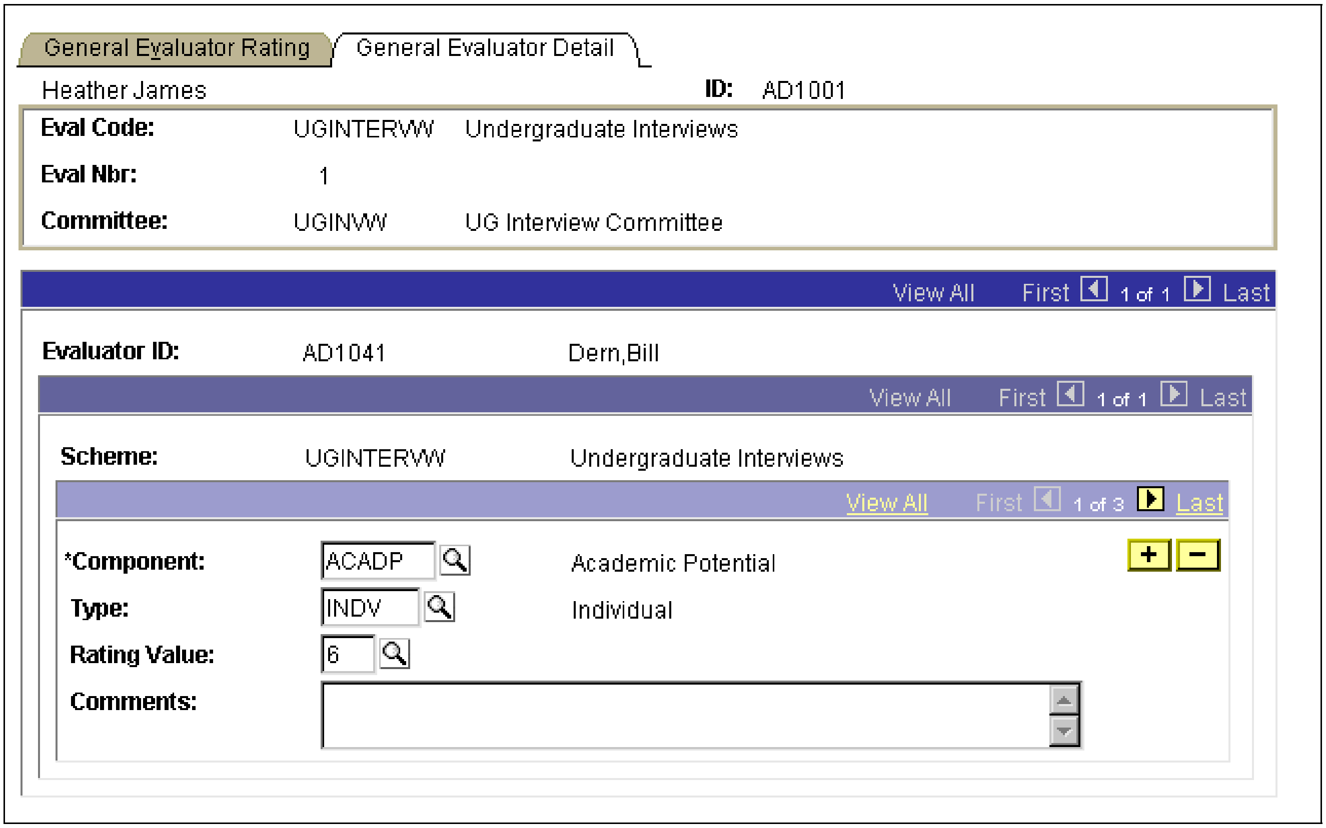
Evaluation Status Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.

Evaluation Date The default for the evaluation date is your system date.

Overall Rating The system automatically calculates the overall rating based on the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the General Evaluator Detail page. You can override this calculation if desired.

Entering and Updating General Evaluator Ratings of Rating Components

Access the General Evaluator Detail page.



General Evaluator Detail page

Component and **Type** — The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types if desired.

Rating Value — Select a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.

When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the General Evaluator Rating page. You must enter ratings on *this* page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.

Creating Application Evaluations

Use the Application Evaluations component to create *application* evaluations. Application evaluations are tied to an academic career, academic program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the academic career and program that they are applying to.

Use this component to record subjective rating values (such as a rating given by a committee) and objective rating values (such as a test score). If you are using the Automatic Evaluation process to retrieve objective rating values from applications, those rating values appear on the Overall Rating page in this component.

After creating the application evaluation, use the Application Evaluator Ratings component to enter actual evaluator rating values. However, if you are not using rating schemes, you can manually enter overall ratings in the General Evaluations component.

This section discusses how to:

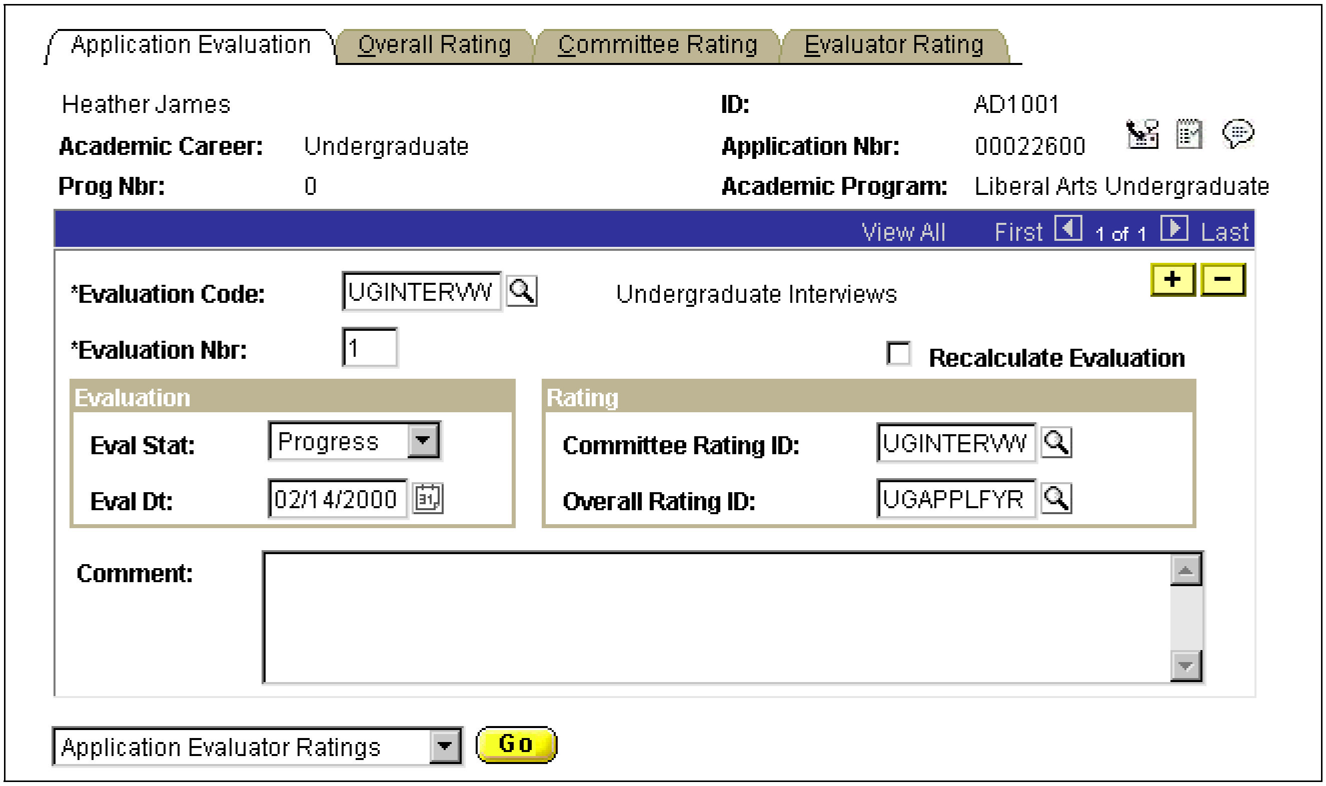
- Assign an evaluation code to an application.
- Enter overall component ratings for an application.
- Assign a committee to an application evaluation.
- Assign evaluators to an application evaluation.

Pages Used to Create Application Evaluations

Page Name	Object Name	Navigation	Usage
Application Evaluation	ADM_EVAL1	Develop Enrollment, Evaluate Applicants, Use, Application Evaluations, Application Evaluation	Assign evaluation codes and to enter high level, general information about an applicant. The evaluation code populates various fields in this component with default information (such as rating schemes and committees).
Overall Rating	ADM_OVERALL_RATING	Develop Enrollment, Evaluate Applicants, Use, Application Evaluations, Overall Rating	Manually enter or edit overall rating information for an application evaluation. The Overall Rating page stores objective overall rating information for an application evaluation. Rating values for a rating scheme's components are stored on this page for an application evaluation. Because it is unnecessary for each committee member to evaluate objective information (such as a test score), you can store objective rating values for each application in one place. You can enter the rating values manually, or you can use the Evaluation Calculation process to determine the values.
Committee Rating	ADM_EVAL2	Develop Enrollment, Evaluate Applicants, Use, Application Evaluations, Committee Rating	Assign application evaluation committees to an application evaluation. The overall ratings of the committees you assign are also stored on this page.
Evaluator Rating	ADM_EVAL3	Develop Enrollment, Evaluate Applicants, Use, Application Evaluations, Evaluator Rating	Assign evaluators to an application evaluation, and record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to an Application

Access the Application Evaluation page.



Application Evaluation page

Evaluation Code

Select an evaluation code to be used to evaluate this applicant. Evaluation codes are set up on the Evaluation Table page. This is where you assign evaluation codes to evaluations manually. Evaluation codes can also be assigned automatically using the evaluation code assignment process.

See Chapter 20, "Evaluating Applicants Using Automatic Processing," Assigning Evaluation Codes to Applications in Batch, page 378.

Evaluation Nbr (number)

The evaluation number defaults to *1* for the first application evaluation you enter, *2* for the second, and so on.

Eval Stat (evaluation status)

Select the evaluation status reflecting the current status of this application evaluation. Define evaluation status codes on the Evaluation Status Table page.

Eval Dt (evaluation date)

The default evaluation date is your system date. Edit the date if desired.

Committee Rating ID

The committee rating ID automatically appears if the evaluation code was defined with a committee rating ID. A committee rating ID is a rating scheme with a type equal to *Committee.* Such schemes evaluate subjective information about an application. If you only want to evaluate objective data, enter an overall rating ID only. You can change the committee rating ID if desired.

Overall Rating ID

The overall rating ID automatically appears if the evaluation code was defined with an overall rating ID. An overall rating ID is a rating scheme with a type equal to *Overall.* Such rating schemes evaluate objective information about an application. If you only want to evaluate subjective data, enter a committee rating ID only. You can change the overall rating ID if desired.

Recalculation Evaluation

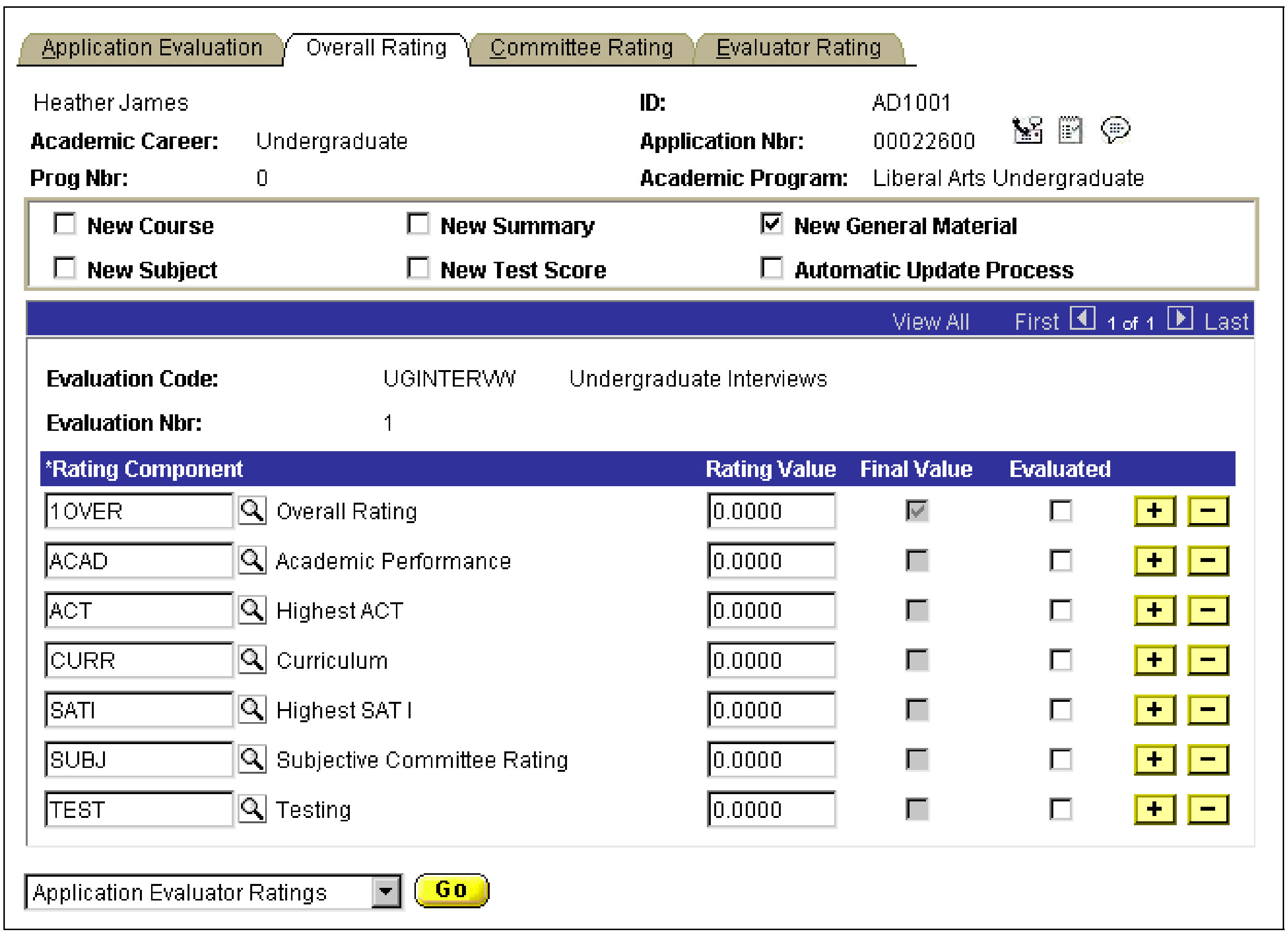
The system selects this check box if application materials were linked to this application—either manually or through the application materials extract process—after the application status update process processed this application. This tells the system that even though this application has already gone through the application status update process, it needs to go through it again.

Go

Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Entering Overall Component Ratings for an Application

Access the Overall Rating page.



Overall Rating page

New Course, New Subject, New Academic Summary, New Test Score, and **New General Materials**

If a new course, subject, academic summary, test score, or general material is added to this person's record, the system selects their respective check boxes.

Automatic Update Process The system selects this check box if one of the other choices in this group box is selected. Selecting this check box lets the automatic update process know that this application needs to be considered for processing when you run the application materials extract process.

Rating Component The rating components of the rating scheme that you entered in the Overall Rating ID field on the Application Evaluation page appear. You can add new rating components.

Rating Value If you are manually rating these components, enter the rating values for each component that you want to award this application. The Evaluation Calculation process will calculate these values if you are automatically rating these components.

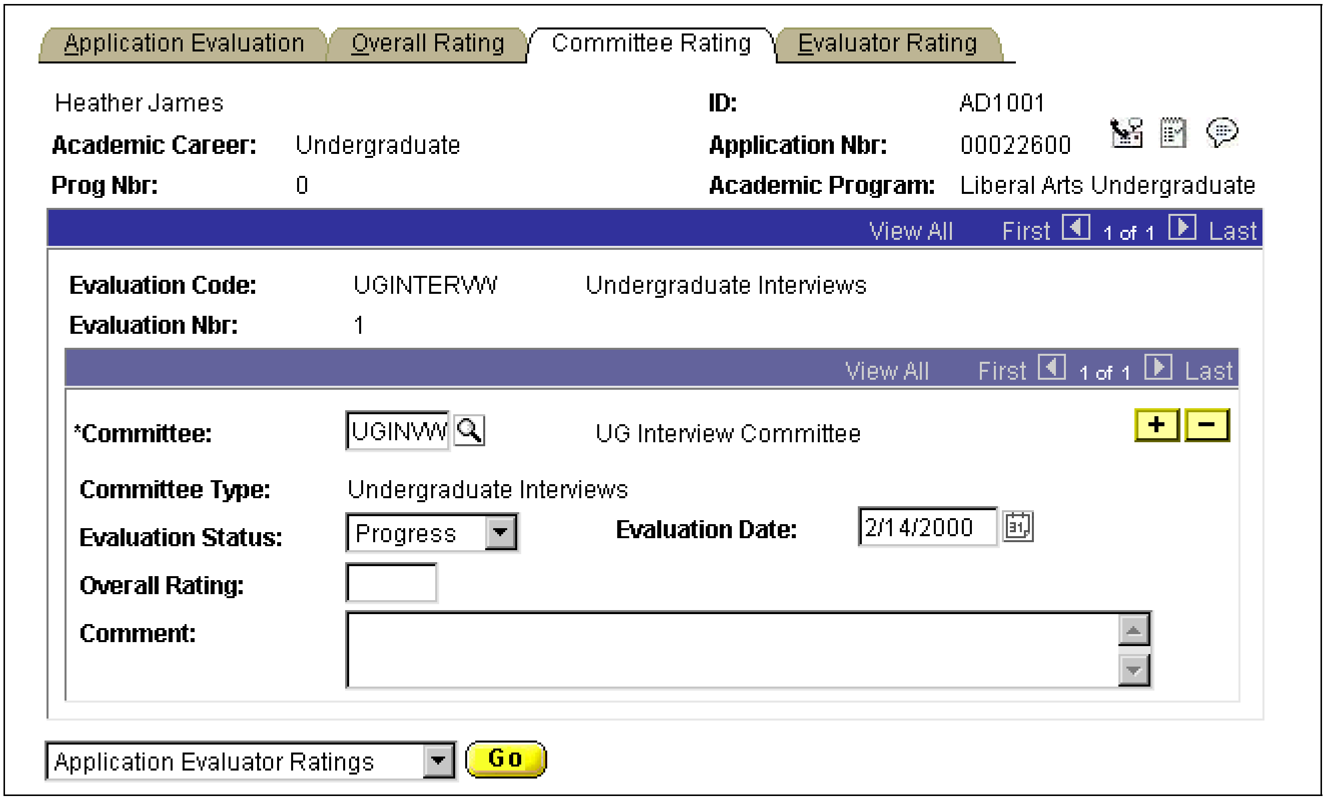
Final Value The system selects this check box if the rating component was defined as a final value component. Final value components are those that are required to be filled before the Evaluation Calculation process processes this application.

Evaluated The system selects this check box if a rating component was evaluated through the Evaluation Calculation process. If you are manually evaluating this component, select this check box after evaluating the component.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Assigning a Committee to an Application Evaluation

Access the Committee Rating page.



Committee Rating page

Committee The system populates the committee if the evaluation code for this application evaluation has an evaluation committee assigned to it. You can add committees if desired.

Committee Type The type of the committee that you select appears.

Evaluation Status Select the evaluation status reflecting the current status of this committee's evaluation. The evaluation code assignment process enters the evaluation status when you assign evaluation codes automatically. Define evaluation status codes on the Evaluation Status Table page.

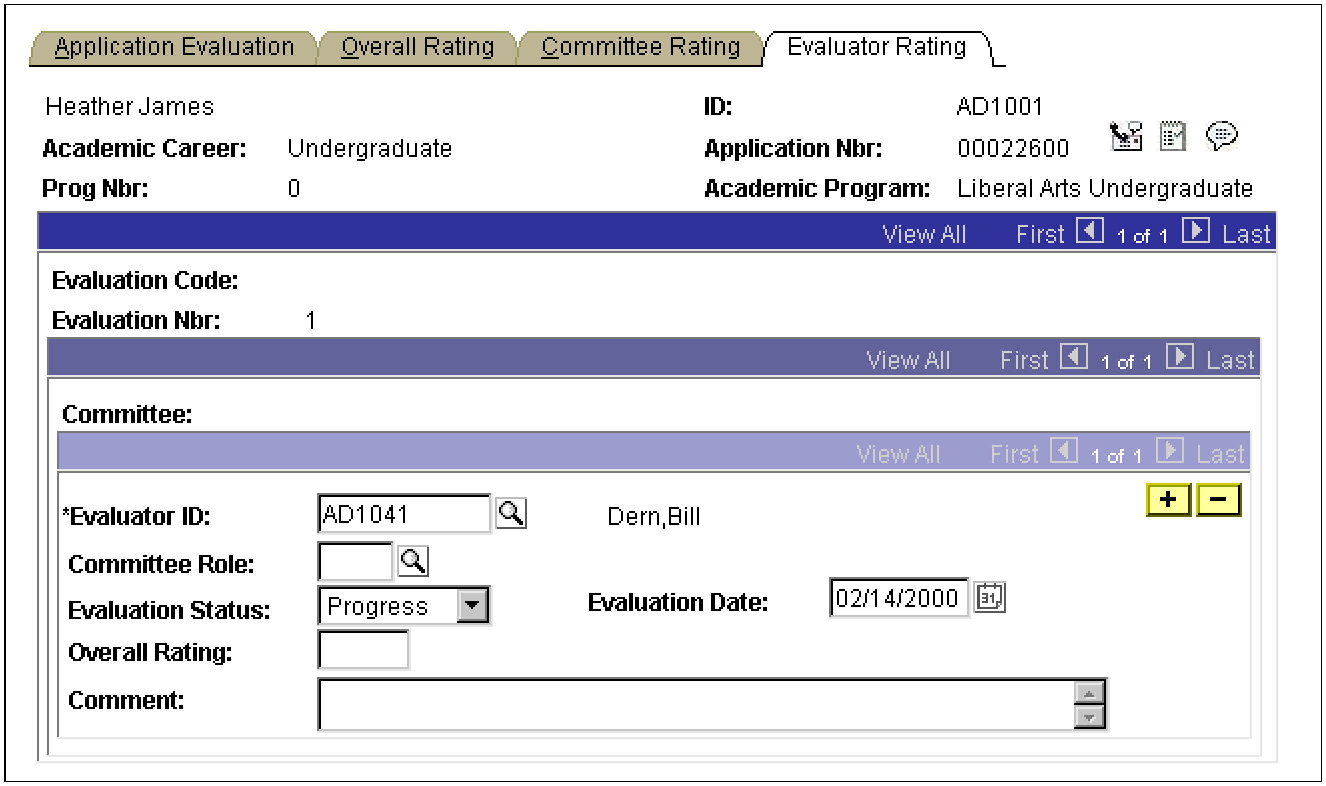
Evaluation Date The default for the evaluation date is the system date. The evaluation code assignment process enters the evaluation date when you assign evaluation codes automatically.

Overall Rating The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Assigning Evaluators to an Application Evaluation

Access the Evaluator Rating page.



Evaluator Rating page

Evaluator ID

Select an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the Application Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.

Note. You cannot enter evaluators under an evaluation code unless you have first entered a committee on the Committee Rating page.

Committee Role

Select the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.

Evaluation Status

Select the evaluation status reflecting the current status of this evaluator's evaluation. Evaluation status codes are set up on the Evaluation Status Table page.

Evaluation Date

The default for the evaluation date is your system date.

Overall Rating

The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the Application Evaluator Rating page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings for an Application

Use the Application Evaluator Rating component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applications based on rating schemes.

This section discusses how to:

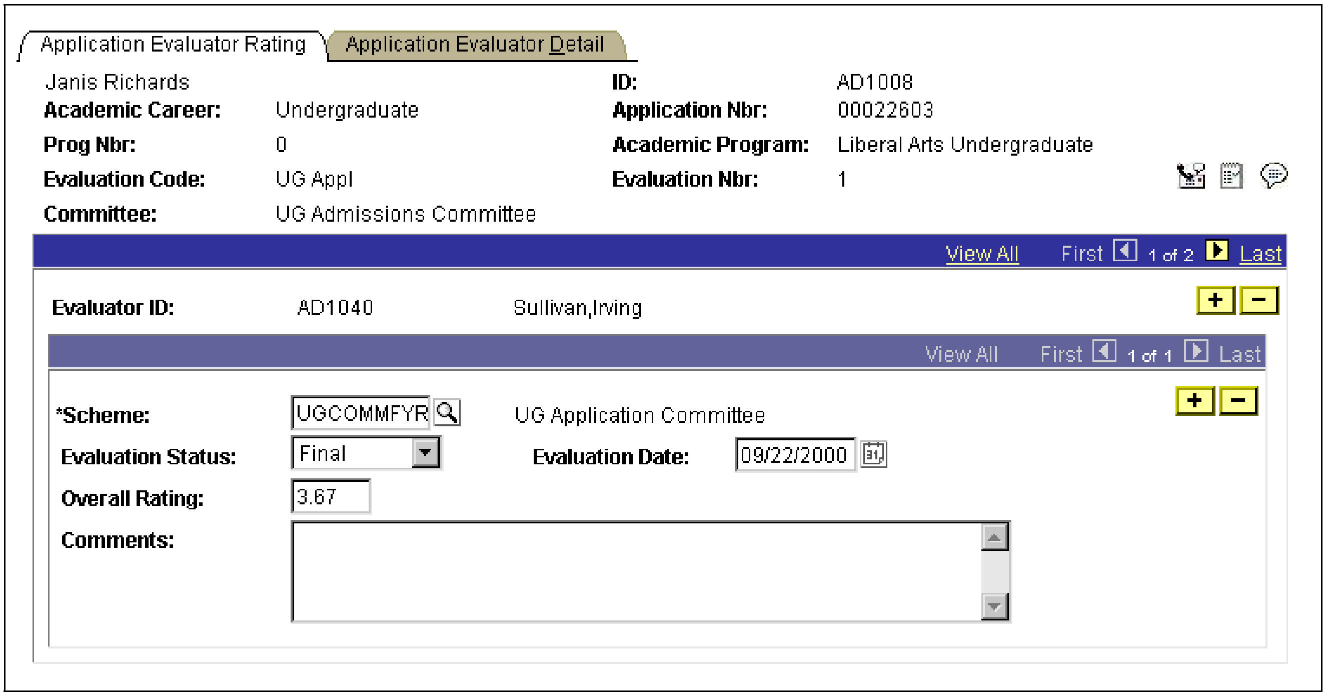
- Enter and update evaluator overall ratings for an application evaluation.
- Enter and update evaluator ratings of individual rating components.

Pages Used to Enter and Update Evaluator Ratings for an Application

Page Name	Object Name	Navigation	Usage
Application Evaluator Rating	ADM_RATING1	Develop Enrollment, Evaluate Applicants, Use, Application Evaluator Ratings, Application Evaluator Rating	Enter evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.)
Application Evaluator Detail	ADM_RATING2	Develop Enrollment, Evaluate Applicants, Use, Application Evaluator Ratings, Application Evaluator Detail	Enter an evaluator's ratings of the components of a rating scheme. The system then averages and displays these ratings on the Application Evaluator Rating page.

Entering and Updating Evaluator Overall Ratings for an Application Evaluation

Access the Application Evaluator Rating page.



Application Evaluator Rating page

Scheme
The system populates the rating scheme according to the rating scheme entered on the Application Evaluation page for this evaluation code (for this person). You can add more than one rating scheme for an evaluator.

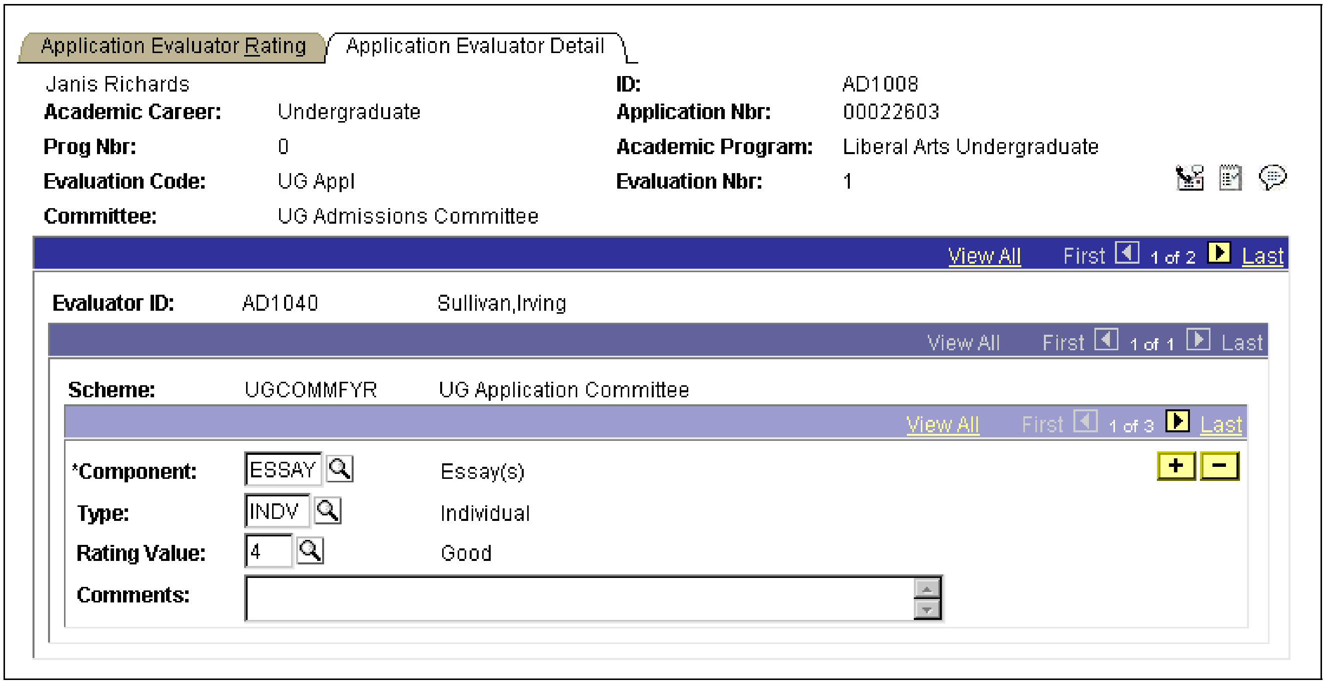
Evaluation Status
Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.

Evaluation Date
The default for the evaluation date is your system date.

Overall Rating
The system automatically calculates the overall rating by averaging the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the Application Evaluator Detail page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings of Individual Rating Components

Access the Application Evaluator Detail page.



Application Evaluator Detail page

Component and **Type**

The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types if desired.

Rating Value

Select a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.

When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the Application Evaluator Rating page. You must enter ratings on *this* page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.

CHAPTER 20

Evaluating Applicants Using Automatic Processing

This chapter provides an overview of evaluating applicants using automatic processing and discusses how to:

- Assign evaluation codes to applications in batch.
- Link application materials to applications in batch.
- Calculate rating values through an automatic process.
- Automatically update application program evaluation statuses.

Understanding How to Evaluate Applicants Using Automatic Processing

PeopleSoft Recruiting and Admissions provides the following automatic processes to aid in evaluating applicants:

- Mass Change and the Assign Evaluation Codes process (ADEVALCD.SQR).

  Assigns evaluation codes to applications in batch. Evaluation codes contain default data required for evaluating applicants (such as the rating scheme, evaluation status, and so on).

- Extract data for Adm Appl Matl (extract data for admissions application materials) process (ADMTLEXT.SQR).

  Assigns application materials to applications in batch. Application materials are used to evaluate applications.

- Assign Adm Applicant Rating (assign admissions applicant rating) process (ADMTLRTG.SQR).

  Retrieves objective scores (such as test scores) and evaluates them based on rules that you define in your own SQCs. Then, the process populates rating values on the Overall Rating page in the Application Evaluation component. Rating values are used to evaluate applicants.

- Program Stack Update process (ADMTLPGS.SQR).

  Checks to see that all of the rating components have been entered, then sums all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values. Finally, updates the application evaluation status based on the rules in your SQCs.

- Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process (SFPBADEP).

  Calculates enrollment deposits in batch on applications on which you've run the Program Stack Update process.

- Activate Applications process (ADPCPPRC).

  Matriculates applicants in batch who were evaluated using the Program Stack Update process.

Note. PeopleSoft delivers sample SQRs to help you with a variety of tasks. However, your institution can modify these SQRs to fit their specific needs. For this reason, your SQRs might be named differently, and they might behave slightly differently than described.

See Also

Chapter 19, "Evaluating Applicants," page 353

Assigning Evaluation Codes to Applications in Batch

Before you can run the application materials extract process or an evaluation calculation for a group of applications, you must assign them an evaluation code. Evaluation codes contain important default information and helps with selecting the appropriate group for extract and evaluation processing.

First you must select the applications that you want to assign the evaluation codes to. Use the Mass Change feature to do this. Then run the Assign Evaluation Codes process to assign the evaluation codes to the applications that the mass change process selected.

To access the Mass Change Definition component, select Develop Enrollment, Evaluate Applicants, Use, Mass Change Definition.

See *PeopleSoft Data Management*

To assign evaluation codes with mass change:

1. Select the appropriate mass change definition to define which applications need to be assigned which evaluation code.

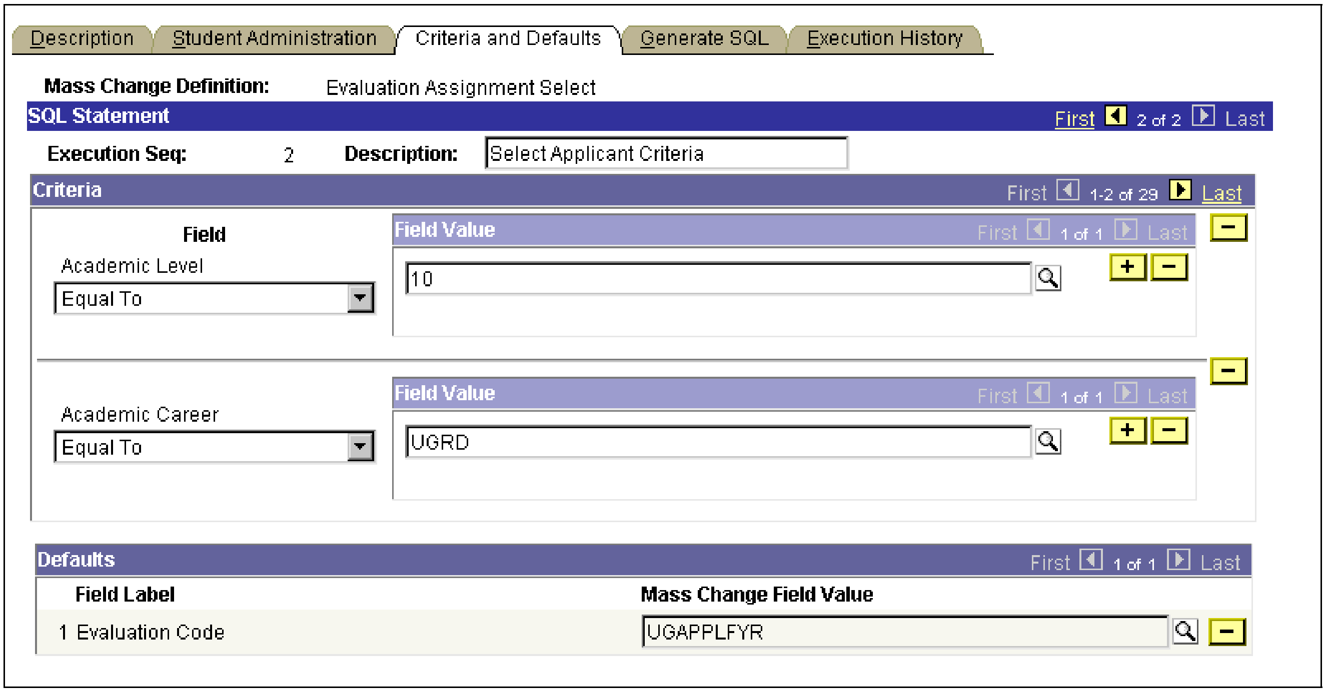
   Use the Mass Change Definition − Description page to enter the mass change definition that defines the criteria by which you select applications. The delivered mass change definition for assigning evaluation codes is *Evaluation Assignment Select.* However, your institution can define its own mass change definition for assigning evaluation codes, but use the delivered mass change definition as a template.

2. Enter criteria for determining which applications to assign the evaluation code, and enter the evaluation code you want assigned to those applications.

   Use the Criteria and Defaults page to enter criteria for determining which applications to assign the evaluation code, and to enter the evaluation code you want assigned to those applications.

   The first execution sequence of the SQL statement in the delivered mass change definition is *Delete Tmp5 Table*. This program clears the temporary table that stores the records of those applications selected the last time you ran this process.

   The second execution sequence of the SQL statement in the delivered mass change definition is *Select Applicant Criteria.* The following page shot shows an example of the criteria that can be used in the selection process.



Example of the Criteria and Defaults page (showing the Select Applicant Criteria SQL Statement)

Use the Criteria group box to enter the criteria by which the mass change process will select applications to assign the evaluation code you select. In the delivered Evaluation Assignment Select mass change definition, there are 29 fields you can use to select applicants (such as academic level, academic career, program status, recruiter ID, and many others). In our example in the previous page shot, the applicant must have an academic level of *10* and must be an undergraduate. However, there could be many more fields selected as search criteria in subsequent rows.

Use the Defaults group box to select the evaluation code that you want the mass change process to assign to the applications that you selected. In the example in the previous page shot, the evaluation code the mass change process will assign is *UGAPPLFYR* (first year undergraduate applicants).

1. Generate the SQL for this mass change definition.

   Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition.

   Remember to click the Clear SQL button if an SQL statement already exists in the text box.

2. Set up a mass change group to define in what order you want the mass change definitions to run.

   Use the Mass Change Group page to set up mass change groups. Create a mass change group to group the steps that it takes to process the applications you selected. Create a group by entering related mass change definitions that you must run to complete a particular task (such as assigning evaluation codes), and the order in which they should be run.

   On the Mass Change Group page, select *SA* (student administration) in the PS Owner field.

   Next, select the mass change definitions. In the previous example, you would run the *Evaluation Assignment Select* mass change definition first. This definition selects all the records chosen by the SQL statement that you generated earlier. Second, you would run the *Evaluation Duplicate Check* mass change definition, which removes any applicants who matched your selection criteria, but were already assigned the evaluation code.

3. Process the mass change group to select the applications to be assigned the evaluation code.

   Use the Run Mass Change page to execute the mass change definitions in the mass change group. The mass change definitions in this group choose your final list of applications that should be assigned a code during the evaluation code assignment process.

   On the Run Mass Change page, select the Execute Mass Change Group option. Then select the mass change group ID that you defined on the Mass Change Group page.

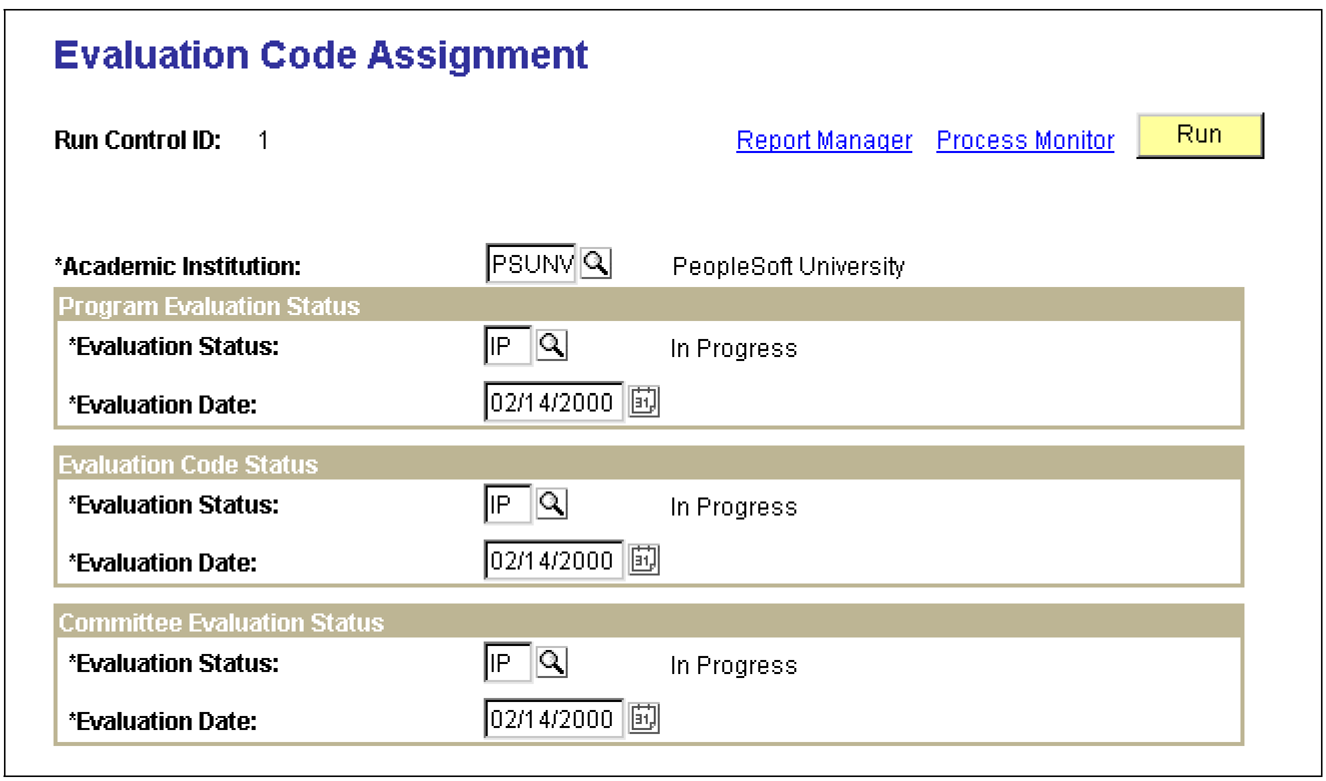
4. Run the Evaluation Code Assignment process (discussed in the following section).

Page Used to Assign Evaluation Codes to Applications in Batch

Page Name	Object Name	Navigation	Usage
Evaluation Code Assignment	RUNCTL_EVALCODE	Develop Enrollment, Evaluate Applicants, Process, Evaluation Code Assignment, Evaluation Code Assignment	Assign the evaluation code to the applications that you selected through the mass change process. **Note.** PeopleSoft delivers a sample SQR for assigning evaluation codes, ADEVALCD.SQR. Your institution can modify this SQR to fit its specific needs.

Running the Evaluation Code Assignment Process

Access the Evaluation Code Assignment page.



Evaluation Code Assignment page

Program Evaluation Status

Evaluation Status and **Evaluation Date**	Enter the evaluation status and date that you want entered on the Application Evaluation page. Define evaluation statuses on the Evaluation Status Table page.

Evaluation Code Status

Evaluation Status and **Evaluation Date**	Enter the evaluation status and date that you want entered on the Application Evaluation page. Define evaluation statuses on the Evaluation Status Table page.

Committee Evaluation Status

Evaluation Status and **Evaluation Date**	Enter the evaluation status and date that you want entered on the Committee Rating and Evaluator Rating pages. Define evaluation statuses on the Evaluation Status Table page.

Click the Run button to run the Assign Evaluation Codes process at user-defined intervals.

Linking Application Materials to Applications in Batch

This section discusses how to link application materials to applications in batch.

Page Used to Link Application Materials to Applications in Batch

Page Name	Object Name	Navigation	Usage
Application Materials Extract	RUNCTL_APPEVAL1	Develop Enrollment, Evaluate Applicants, Process, Application Materials Extract, Application Materials Extract	Assign application materials to applications in batch. Application materials are used to evaluate applicants. **Note.** PeopleSoft delivers a sample SQR for extracting application materials, ADMTLEXT. Your institution can add to or edit the SQCs for this SQR.

Linking Application Materials to Applications in Batch

In order for an application to be considered during the application materials extract process, the application must have an evaluation code assigned on the Application Evaluation page, and the Automatic Update Process check box must be selected on the Overall Rating page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, which must have material extract SQCs defined for it. The Application Materials Extract process uses those SQCs to assign the appropriate materials to the selected applications. Define rating schemes and their material extracts on the Rating Scheme Table page.

Evaluation Code Select an evaluation code. The process only extracts application materials for applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.

Admit Term Select an admit term. The process only extracts application materials for applications with the admit term that you select. Define admit terms on the Term Values Table page.

Evaluation Status Select an evaluation status. The process only extracts application materials for applications with the evaluation status that you select. The process looks at the Evaluation Status field on the Application Program Data page.

Click the Run button to run the Extract data for Adm Appl Matl (extract data for admissions application materials) process at user-defined intervals.

To view the results of this extract process, use the Application Materials Summary pages.

Calculating Rating Values through an Automatic Process

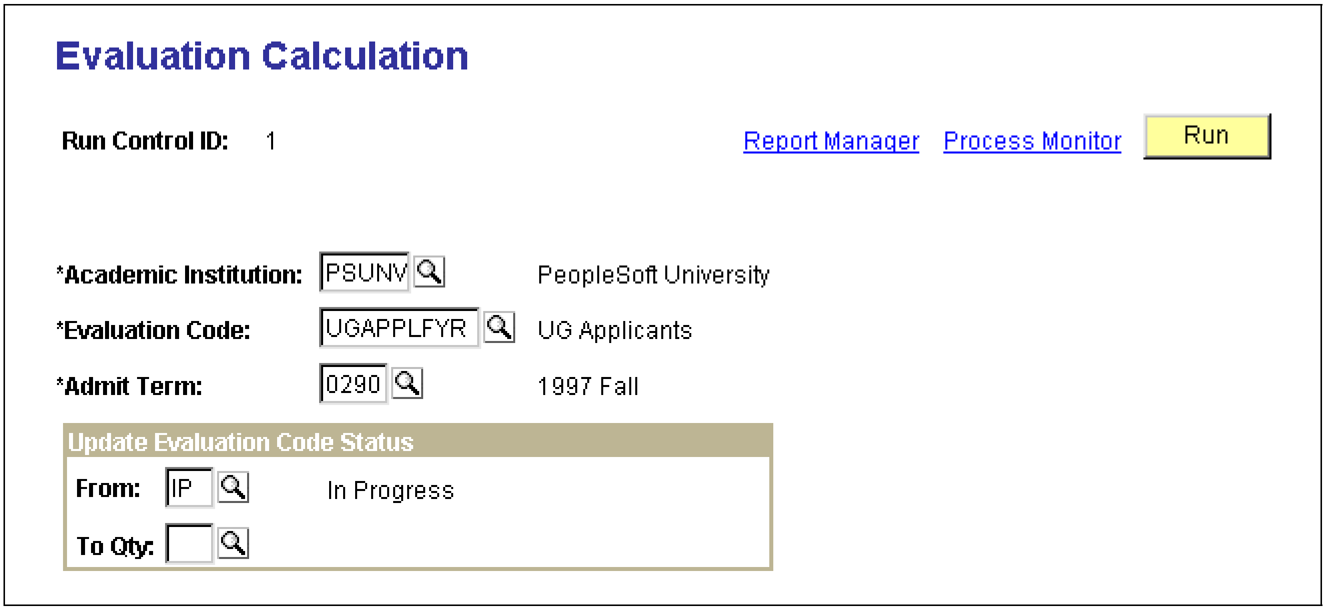
The section discusses how to calculate rating values through an automatic process.

Page Used to Calculate Rating Values through an Automatic Process

Page Name	Object Name	Navigation	Usage
Evaluation Calculation	RUNCTL_APPEVAL2	Develop Enrollment, Evaluate Applicants, Process, Evaluation Calculation, Evaluation Calculation	Run the evaluation calculation.

Calculating Rating Values Through an Automatic Process

Access the Evaluation Calculation page.



Evaluation Calculation page

The application must first be assigned an evaluation code on the Application Evaluation page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, and the rating scheme must have rating components assigned to it. Each rating component in the rating scheme has a defined sequence and formula ID. The formula ID defines which SQC should be run for the rating component. The evaluation calculation looks to those components to come up with rating values that will be inserted on the Overall Rating page for the application. Application materials must have been assigned manually or automatically.

The Evaluation Calculation process looks for applications that meet the criteria you enter here which have never been calculated or which were previously calculated, but have had materials linked to the application after the last calculation was run. If new materials have been added since the last calculation, the system selects the Recalculate Evaluation check box on the Application Evaluation page.

When the Evaluation Calculation process finds an application that meets its criteria, it retrieves the values that your SQCs tell it to retrieve, evaluates the values based on the rules in your SQC, and populates the result on the Overall Rating page in the Application Evaluation component. For example, suppose you determine that an SAT score of over 1450 is worth a rating value of 10. Suppose further that you run the process and it retrieves an SAT score of 1462. The process would evaluate based on your rules and populate the rating value (10) in the Rating Value field for the test score component.

Note. PeopleSoft delivers a sample SQR for evaluating applications. Your institution must define its own SQCs for this SQR, which define the rules by which applications should be evaluated.

Evaluation Code Select an evaluation code. The process only evaluates applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.

Admit Term Select an admit term. The process only evaluates applications that have the admit term you select. Define admit terms on the Term Values Table page.

From The process only evaluates applications that have the evaluation status you select.

To Select the evaluation status that you want the process to *add* to the application evaluations.

Click the Run button to run the Assign Adm Applicant Rating (assign admissions applicant rating) process at user-defined intervals.

Automatically Updating Application Program Evaluation Statuses

Use the Program Stack Update process to automatically update the program evaluation status of multiple applications.

This process looks to the parameters you define to choose the applications to be considered for the status update. The program looks to the Overall Rating page to verify that all rating components designated as final value have been evaluated. The program then determines if any of these applications have a future dated row on the Application Program Data page. Any records with a future dated row are *not* included in this process.

The next step in the process is to sum all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values.

For each application evaluated, the Application Program Data page is updated as follows:

- The process updates the program evaluation status.
- The process inserts a new program data row with an effective date equal to your system date, or, if the most recent row has the same effective date as the current date, the sequence number is incremented.

  The new row contains the same data as the previous row, with the following exceptions: program action, action date and program status, which the process updates. The action reason is also updated if you have defined for it to do so in your SQC.

The values the process inserts are determined by the rules of the SQCs that your institution defines.

When you update application program data via the Program Stack Update process, you're unable to manually calculate enrollment deposits or activate applicants as students. Therefore, you must calculate enrollment deposits and activate applicants as students via two COBOL processes: the Calculate Deposits process and the Activating Applications process.

This section discusses how to:

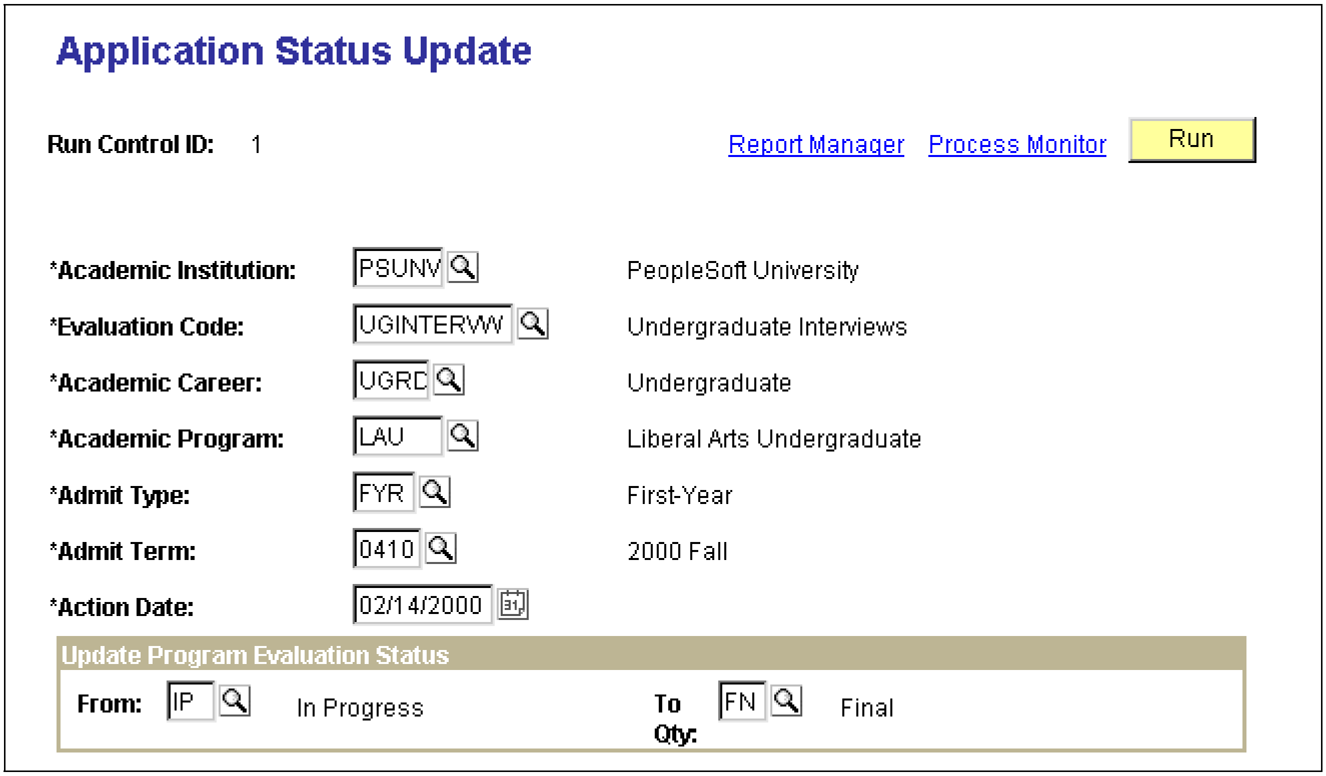
- Updating application program evaluation status using the Program Stack Update process.
- Calculating enrollment deposits using the Deposit Fees Calc (Batch) process.
- Activating applicants as students using the Activate Applications process.

Pages Used to Automatically Updating Application Program Evaluation Statuses

Page Name	Object Name	Navigation	Usage
Application Status Update	RUNCTL_EVALSTATUS	Develop Enrollment, Evaluate Applicants, Process, Application Status Update, Application Status Update	Perform a background process to update the program evaluation status of applications that have been evaluated. **Note.** PeopleSoft delivers a sample SQR, ADMTLPGS.SQR. Your institution can add to or edit the SQCs for this SQR.
Calculate Deposits	RUNCTL_SFPBADEP	• Develop Enrollment, Evaluate Applicants, Process, Calculate Deposits, Calculate Deposits • Develop Enrollment, Process Applications, Process, Calculate Deposits, Calculate Deposits	Calculate enrollment deposits for applicants who were admitted via the Program Stack Update process. You must calculate an enrollment deposit before activating the applicant as a student if you have a deposit fee code assigned to your application center (on the Application Center Table page). You must first admit applicants through the Program Stack Update process.
Activate Application	RUNCTL_AD_SR	• Develop Enrollment, Evaluate Applicants, Process, Activate Applicants, Activate Application • Develop Enrollment, Process Applications, Process, Activate Applicants, Activate Application	Activate applicants as students. This process inserts a program action of Matriculate (MATR) on the Application Program Data page and creates the student program and plan records. Use the Activate Applications process if you admitted an applicant through the Program Stack Update process, and therefore could not manually matriculate the applicant. If your institution requires an enrollment deposit prior to matriculation, you must calculate a deposit prior to running this process.

Updating Application Program Evaluation Status Using the Program Stack Update Process

Access the Application Status Update page.


Application Status Update

Run Control ID: 1 Report Manager Process Monitor Run

*Academic Institution: PSUNV PeopleSoft University
*Evaluation Code: UGINTERVW Undergraduate Interviews
*Academic Career: UGRD Undergraduate
*Academic Program: LAU Liberal Arts Undergraduate
*Admit Type: FYR First-Year
*Admit Term: 0410 2000 Fall
*Action Date: 02/14/2000

Update Program Evaluation Status
From: IP In Progress To Qty: FN Final

Application Status Update page

Evaluation Code Select an evaluation code. The process only processes the applications that have the evaluation code that you select. Define evaluation codes on the Evaluation Table page.

Academic Career Select an academic career. The process only processes the applications that have the academic career that you select. This is the academic career to which that the applicant is applying.

Academic Program Select an academic program. The process only processes the applications that have the academic program that you select.

Admit Type Select an admit type. The process only processes applications that have the admit type that you select. Define admit types on the Admit Type Table.

Admit Term Select an admit term. The process only processes the applications that have the admit term that you select. Define admit terms on the Term Values Table page.

Action Date The default for the action date is your system date. Edit this date to reflect the date you want to appear as the action date on the Application Program Data page.

From The process only process applications that have the evaluation status you select.

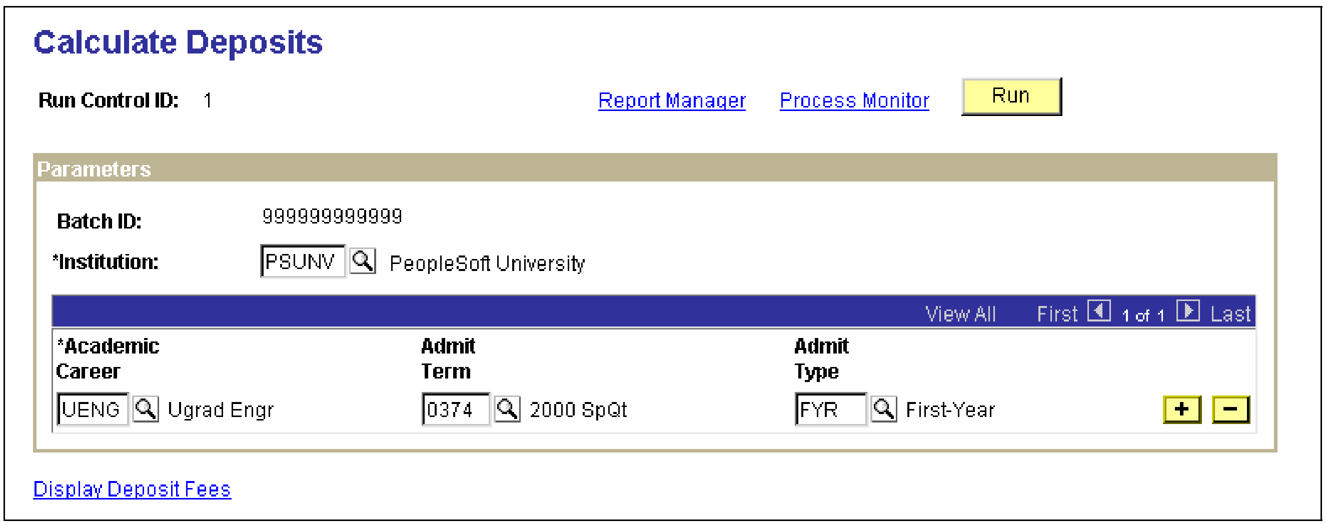
To Select the program evaluation status that you want the process to *add* to the applications on the Application Program Data page.

Click the Run button to run the Program Stack Update process at user-defined intervals.

To view the results of this application program evaluation status update process, you can use the Applicant Progression page, or you can go to an individual's Application Program Data page in the Application Maintenance component.

Calculating Enrollment Deposits Using the Deposit Fees Calc (Batch) Process

Access the Calculate Deposits page.



Calculate Deposits page

Career Select an academic career. The process only calculates enrollment deposits for applications that have the academic career that you select.

Admit Term Select an admit term. The process only calculates enrollment deposits for applications that have the admit term that you select. Define admit terms on the Term Values Table page.

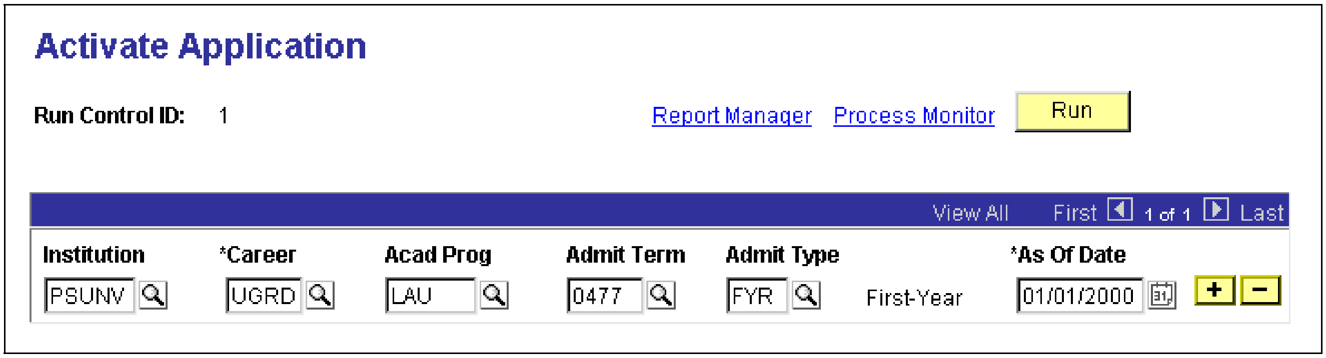
Admit Type Select an admit type. The process only calculates enrollment deposits for applications that have the admit type that you select. Define admit types on the Admit Type Table page.

Click the Run button to run the Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process at user-defined intervals.

To view the results of the Deposit Fees Calc (Batch) process for an applicant, use the Customer Accounts page in the PeopleSoft Student Financials application.

Activating Applicants as Students Using the Activate Applications Process

Access the Activate Application page.



Activate Application page

Career Select an academic career. The process only matriculates applicants who have the academic career that you select.

Acad Program (academic program) Select an academic program. The process only matriculates applicants who have the academic program that you select.

Admit Term Select an admit term. The process only matriculates applicants who have the admit term that you select. Define admit terms on the Term Values Table page.

Admit Type Select an admit type. The process only matriculates applicants who have the admit type that you select. Define admit types on the Admit Type Table page.

As of Date The default for the as of date is your system date. This is the date you ran this process.

Click the Run button to run the Activate Applications process at user-defined intervals.

CHAPTER 21

Viewing Application Evaluation Summaries and Progression

This chapter discusses how to:

- View application evaluation summaries.
- View a summary of an applicant’s progression.

Viewing Application Evaluation Summaries

Use the Application Evaluation Summary pages to view the status of application evaluations.

This section discusses how to:

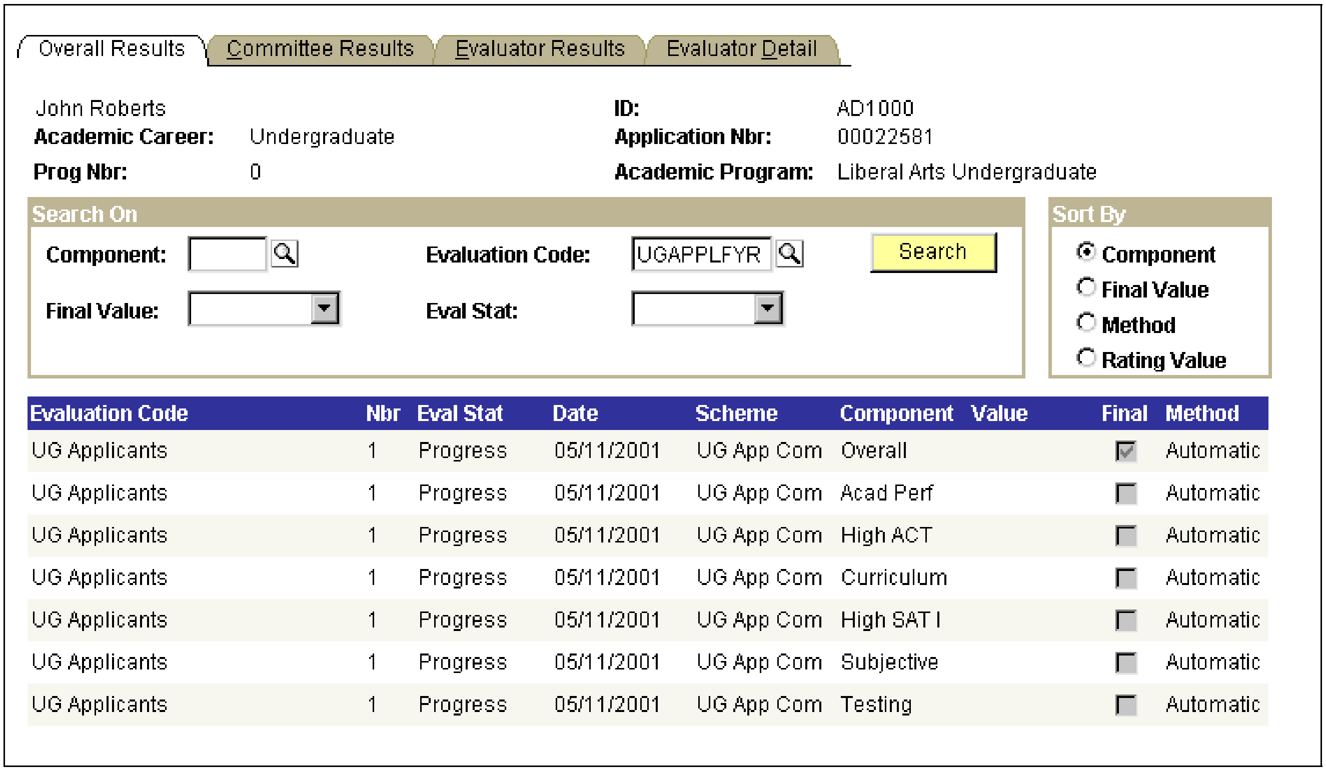
- View overall results of an application evaluation.
- View committee results of an application evaluation.
- View evaluator results of an application evaluation.
- View evaluator detail summary information of an application evaluation.

Pages Used to View Application Evaluation Summaries

Page Name	Object Name	Navigation	Usage
Overall Results	ADM_EVAL_SUMM	Develop Enrollment, Evaluate Applicants, Inquire, Application Evaluate Summary, Overall Results	Look up overall results of an application evaluation for an applicant. You must first complete the application evaluation for this person.
Committee Results	ADM_EVAL_COMM_SUMM	Develop Enrollment, Evaluate Applicants, Inquire, Application Evaluate Summary, Committee Results	Look up results of committee application evaluations for an applicant.
Evaluator Results	ADM_EVALUATOR_SUMM	Develop Enrollment, Evaluate Applicants, Inquire, Application Evaluate Summary, Evaluator Results	Look up results of evaluators' evaluations of an application.
Evaluator Detail	ADM_EVAL_DTL_SUM	Develop Enrollment, Evaluate Applicants, Inquire, Application Evaluate Summary, Evaluator Detail	Look up results of the details of evaluators' evaluations of an application. You must first complete the application evaluation for this person.

Viewing Overall Results of an Application Evaluation

Access the Overall Results page.



Overall Results page

Component Select a rating component If you want to view summary information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.

Final Value Select *Yes* if you want to view summary information for final value components only. Select *No* if you do not want to view only final value components.

Evaluation Code Select an evaluation code if you want to view summary information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

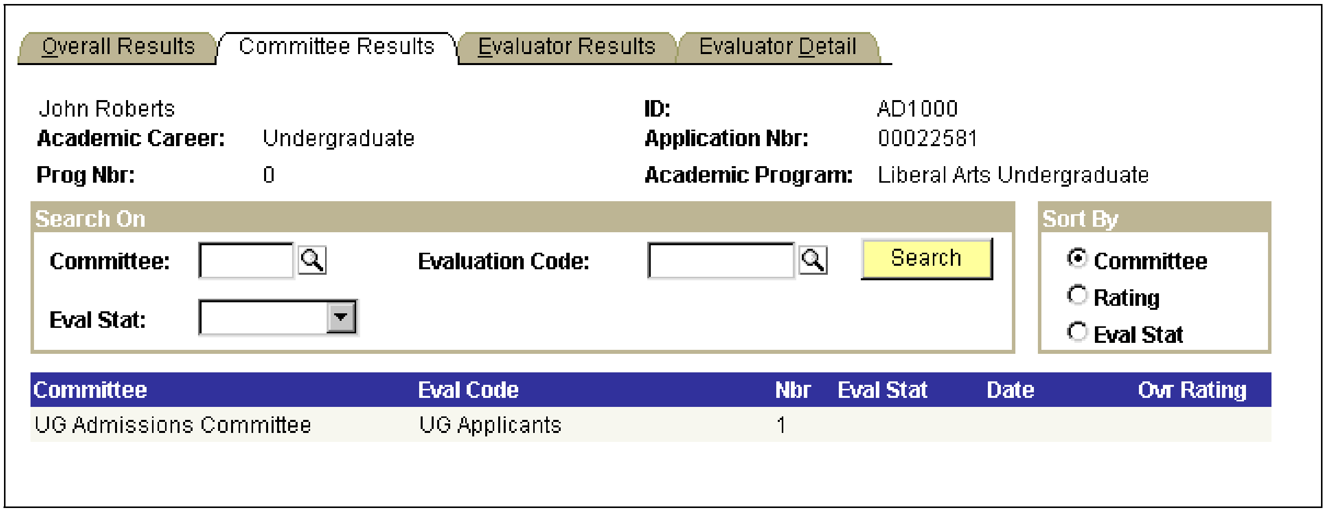
Eval Status (evaluation status) Select an evaluation status if you want to view summary information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Application Evaluation page.

Sort By Select whether you want to view the results by Component, Final Value, Evaluation Method, or Rating Value.

Search Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Committee Results of an Application Evaluation

Access the Committee Results page.



Committee Results page

Committee Select an evaluation committee If you want to view committee information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Evaluation Code Select an evaluation code if you want to view committee information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

Evaluation Status Select an evaluation status if you want to view committee information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Committee Evaluation page.

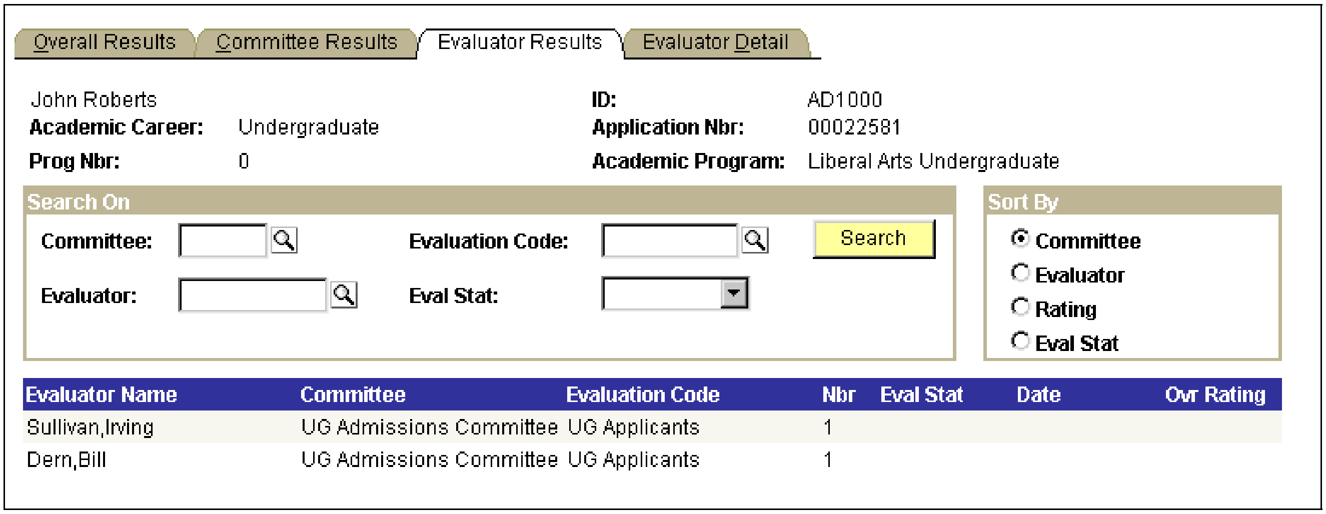
Sort By Select whether you want to view the results by *Committee, Rating,* or *Eval Stat* (evaluation status).

Committee, Rating, or **Evaluation Status** Select whether you want to view the results of your summary information by committee, rating, or evaluation status.

Search Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Results of an Application Evaluation

Access the Evaluator Results page.



Evaluator Results page

Committee

Select an evaluation committee If you want to view evaluator result information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Evaluation Code

Select an evaluation code if you want to view evaluator result information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

Evaluator

Select an evaluator if you want to view evaluator result information for a specific evaluator.

Eval Stat (evaluation status)

Select an evaluation status if you want to view evaluator result information by this criterion. When you click the Search button the system retrieves evaluator result information for those evaluations that have matching evaluation statuses on the Evaluator Rating page.

Sort By

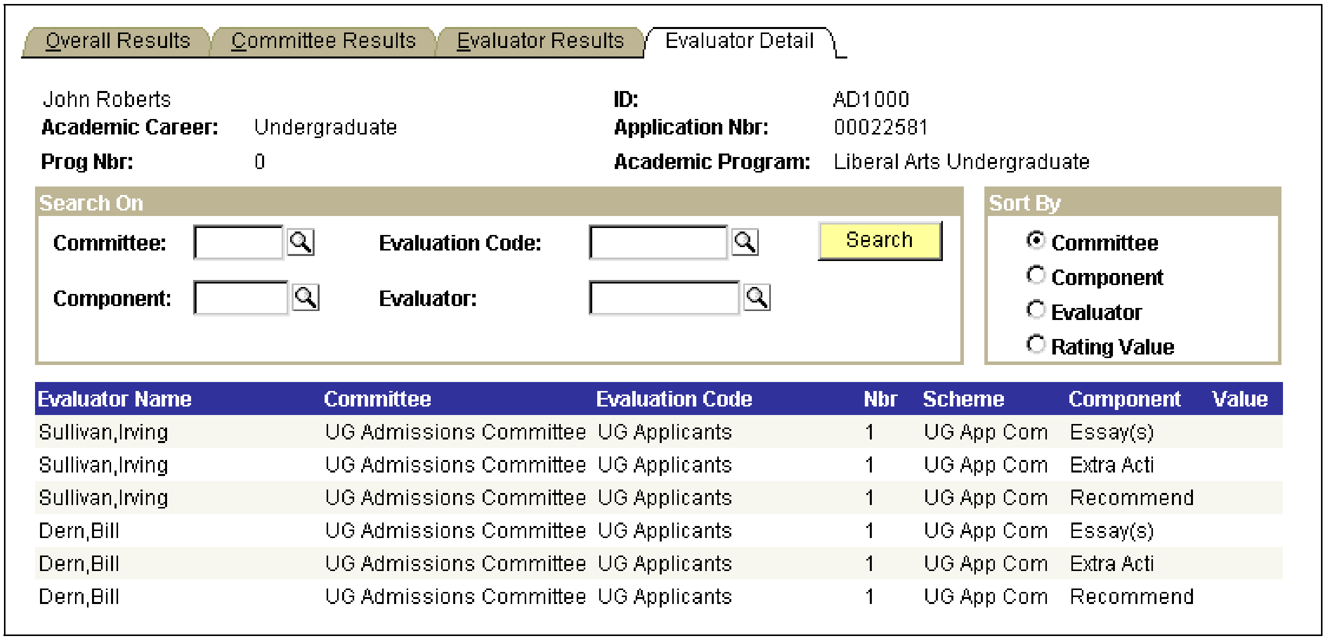
Select whether you want to view the results by *Committee, Rating,* or *Eval Stat* (evaluation status).

Search

Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Detail Summary Information for an Application Evaluation

Access the Evaluator Detail page.



Evaluator Detail page

Committee

Select an evaluation committee If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Evaluation Code

Select an evaluation code if you want to view evaluator detail information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

Component

Select a rating component If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.

Eval Stat (evaluation status)

Select an evaluation status if you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves evaluator detail information for those evaluations that have matching evaluation statuses on the Application Evaluator Detail page.

Sort By

Select whether you want to view the results by *Committee, Component, Evaluator,* or *Rating Value.*

Search

Click this button to bring up the evaluator detail information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing a Summary of an Applicant's Progression

This section discusses how to view a summary of an applicant's progression.

Page Used to View a Summary of an Applicant's Progression

Page Name	Object Name	Navigation	Usage
Applicant Progression	APPL_PROGRESS_SUMM	• Develop Enrollment, Evaluate Applicants, Inquire, Applicant Progression, Applicant Progression • Develop Enrollment, Process Applications, Inquire, Applicant Progression, Applicant Progression	Look up a summary of an applicant's progression through the recruiting and admissions business process. Summary data (such as status and program action) can be viewed for the person as a prospect, applicant, and student. Individuals must have an application in your database for you to be able to view their progression.

CHAPTER 22

Calculating Admissions Averages

This chapter provides an overview of admissions averages calculation, lists prerequisites, and discusses how to:

- Set up rules for the Admissions Averages SQC.
- Run the Application Materials Extract process.
- Evaluate applicants based on admissions averages.
- Run the Application Status Update process.
- Update admissions averages for financial aid and student records.

Understanding Admissions Averages Calculation

When you evaluate an applicant for admission to your organization, you can evaluate that applicant by the grade point average he or she earned in a specific set of classes. For example, an institution with a nursing program can evaluate applicants based on the grade point averages applicants earned in nursing prerequisites.

You can calculate the grade point average, evaluate the applicant based on that grade point average—an SQC defined by your institution determines the status of the application—and then update the applicant's application status.

To evaluate applicants based on admissions averages:

1. Set up the rules for the delivered admissions averages SQC (ADEVLAVG.sqc).
2. Assign the admissions evaluation code to the applicant and run the Materials Extract process (ADMTLEXT.sqr).
3. Run the Evaluating Applicants process (ADMTLRTG.sqr) to calculate the average.
4. Update the application status (ADMTLPGS.sqr).
5. You can also update financial aid and student records and generate an admissions average report, if desired.

Prerequisites

To calculate admissions averages, you use rating components, rating schemes, and evaluation codes. You set up one rating component for averages (AVDAVG), but you can set up many rating schemes that use the averages rating component. You can name your rating schemes whatever you like, but you must link the average rating component to each scheme that calculates admissions averages. For example, suppose that you calculate averages for your nursing program using the rating scheme UAVGNUR, for your computer engineering program using the rating scheme UAVGCEN, and for your honors English program using the rating scheme UAVGHEN. You would need to assign each of these rating schemes the ACDACG rating component.

You enter an SQC on the rating scheme, and you link the rating scheme to the evaluation code. You enter this code when you run the Evaluation Calculation process (ADMTLRTG.sqr) to calculate the averages. The evaluation code is linked to the rating scheme, which tells the process to execute the SQC.

Steps to take before you calculate admissions averages:

- Define an admissions averages rating component.

  Use the Rating Comp Def Table (rating component definition table) page to define an admission average rating component. Each rating scheme can have many rating components. For example, you can evaluate applicants based on an interview, SAT/ACT scores, overall GPA, and a grade average of a group of prerequisites. Each of these parameters would be defined as a rating component. You can also define a rating component for an overall score that the system uses to determine the application status. However, you need a rating component set up specifically for averages because the admissions averages SQC has to be associated with a specific rating component to calculate the desired averages.

  Important! When you enter the Rating Comp Def Table page for the first time, the system asks you to enter an institution and a rating component. Enter ADAVG in the Rating Component field.

- Define an admissions averages rating scheme.

  Use the Rating Scheme Table page to define the admissions average rating scheme that the system uses in the admissions evaluation process. You can name the rating scheme whatever you like, and you can define many rating schemes to calculate various admissions averages.

  Use the Rating Components Table page to assign the admissions averages rating component (ADAVG) to the rating scheme, and to enter the SQC that the process uses to calculate averages.

  When setting up the rating scheme for calculating admissions averages, be sure to select the Final Value check box on the Rating Components Table page. You must select this check box for the Evaluation Calculation process (ADMTLRTG.sqr) to consider this rating component in the admissions decision. Selecting this check box also enables you to post the results of the calculation to the application, and to update the Averages for Fin. Aid and Recs (averages for financial aid and records) page.

  The Method field must be set to Automatic to call the averages calculation SQC.

  Important! You must enter ADEVLAVG in the Formula ID field. This is the delivered SQC that the system must run to calculate admissions averages.

- Define an admissions averages evaluation code.

Use the Evaluation Table page to define your evaluation code for admissions averages. Select the rating scheme that you want to use to calculate admissions averages—the averages rating component (ADAVG) must be tied to this rating scheme—in the Overall Rating ID field. This is the hook that ties the evaluation code to the average calculation SQC. In addition, when you prepare to run the Evaluation Calculation process, you enter an evaluation code. The process runs the Evaluation Calculation process on applications that are assigned the same evaluation code.

Important! In order for an application to be considered during the Evaluation Calculation process, the application must have an evaluation code assigned on the Application Evaluation page.

Setting Up Rules for the Admissions Averages SQC

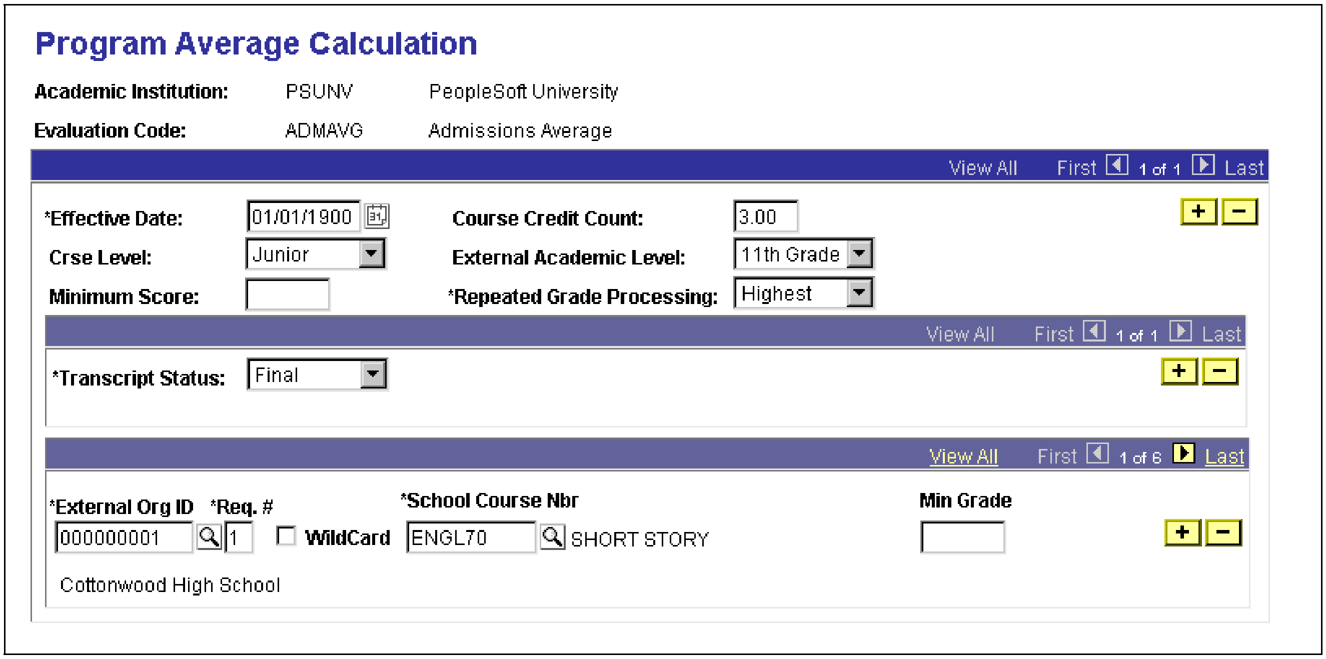
This section discusses how to set up rules for the admissions averages SQC, and provides examples of average program calculation and external courses and admissions averages.

Page Used to Set Up Rules for the Admissions Averages SQC

Page Name	Object Name	Navigation	Usage
Program Average Calculation	PROG_AVG_CALC	Develop Enrollment, Evaluate Applicants, Setup, Average Calculations, Program Average Calculation	Set up rules for the delivered admissions averages SQC (ADEVLAVG). Using the criteria that you select in this page, the SQC searches the applicant's external course history to find courses that match the criteria that you set up here. Once the process finds a match it takes the official grade from the external course history, converts it to a numerical value if it is not in this format already, and averages it with the other course grades it finds.

Setting Up Admissions Averages SQC Rules

Access the Program Average Calculation page.



Program Average Calculation page

Course Credit Count

Enter the minimum number of total course credits that the applicant must have taken in order for the process to calculate an admissions average. The average calculation process looks at each course listed in the External Courses page for this applicant to find matches based on the criteria you select. The process counts the number of course credits for each course. If the process—using the criteria that you set up—cannot find enough matches to add up to your course credit criteria, the process does not generate an average. The process instead produces the following error message: "An average was not calculated because the student has not met the minimum course credit count."

See Chapter 22, "Calculating Admissions Averages," Viewing Admissions Calculation Errors, page 406.

Crse Level (course level)

Enter the course level required for this average calculation. The process only looks at external courses that have the value that you select in the Course Level field on the External Courses page.

External Academic Level

Enter the external academic level required for this average calculation. The process only looks at external courses that have this external academic level in the Acad Level field on the External Courses page.

Minimum Score

Enter a minimum score if you want the process to only include in the calculation average those external courses that contain a score of at least the value that you enter in the Grade In/Official field on the External Courses page. In the previous page shot, the score must be at least *50.* Thus, an external course that meets all of the other criteria set up on this page but contains a grade of less than *50* is be used in the average calculation.

Repeated Grade Processing

Select how you want the process to choose between two or more repeated courses. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are:

First: If the process finds a repeated course, it uses the grade of the first course it finds in the calculation process.

Highest: If the process finds a repeated course, it uses the highest grade of the repeated courses in the calculation process.

Last: If the process finds a repeated course, it uses the grade of the last course it finds in the calculation process.

Transcript Status

Enter the transcript status to be used in this average calculation. The system only uses those applications with this transcript status in the calculation process. You can insert a row to specify more than one transcript statuses.

External Org ID (external organization ID)

Enter the external organization ID that is associated with the course that is to be used in this average calculation.

Req# (requirement number)

Requirement number enables the average calculation SQC (ADEVLAVG) to determine which group of courses should be evaluated together when more than one course can satisfy a program prerequisite.

See Chapter 22, "Calculating Admissions Averages," Viewing an Average Program Calculation Example, page 401.

Wildcard

Select this option if you want to calculate all courses that begin with the value in the School Course Nbr field.

For example, if you entered SCNC in the School Course Nbr field, and selected the Wildcard option, the process would look for any course beginning with SCNC, such as SCNC10, SCNC100, and SCNC15.

School Course Nbr (school course number)

Enter the school course number to be used for this average calculation.

Min Grade (minimum grade)

Enter a minimum grade if you want to override the Minimum Score field for this external course.

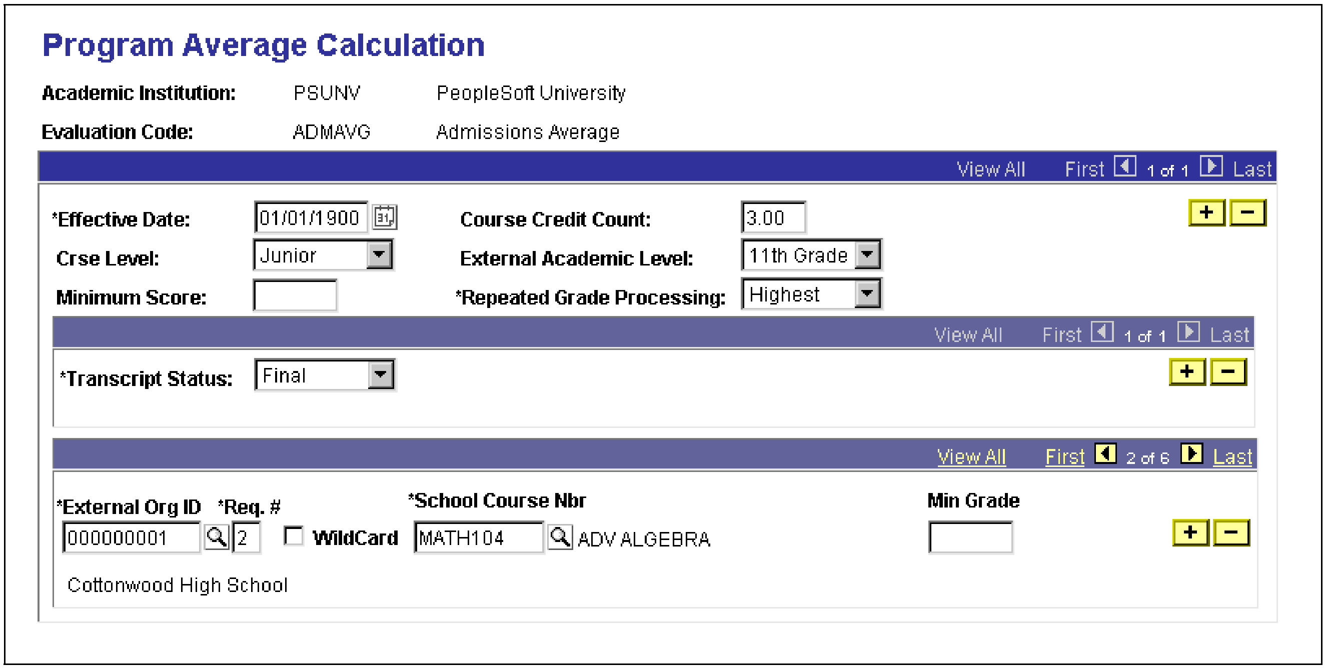
Viewing an Average Program Calculation Example

Suppose that one of the criteria with which you evaluate applicants is a grade point average of a select number of classes. You calculate the average and use the average calculation functionality to evaluate applicants and update the application status.

For example, suppose that you evaluate applicants on the grade point average of the following courses:

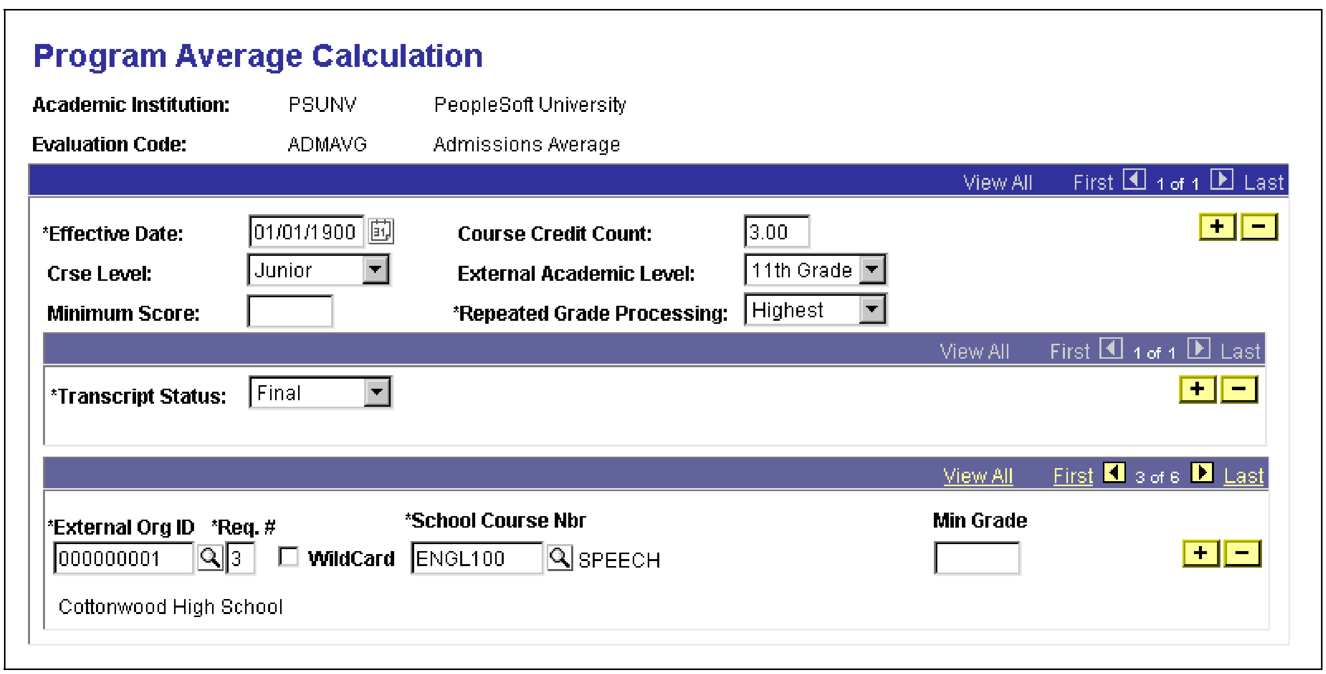
1. ENGL70
2. MATH104
3. One of the following: ENGL100, ENGL92, or SCNC25

Therefore, use an average based on the grades of only three courses in our Evaluation Calculation process. To calculate the average, enter the first course in the Prg Avg Calc page just as in the previous page shot. Then, insert a row in the bottom portion of the page and do as follows:



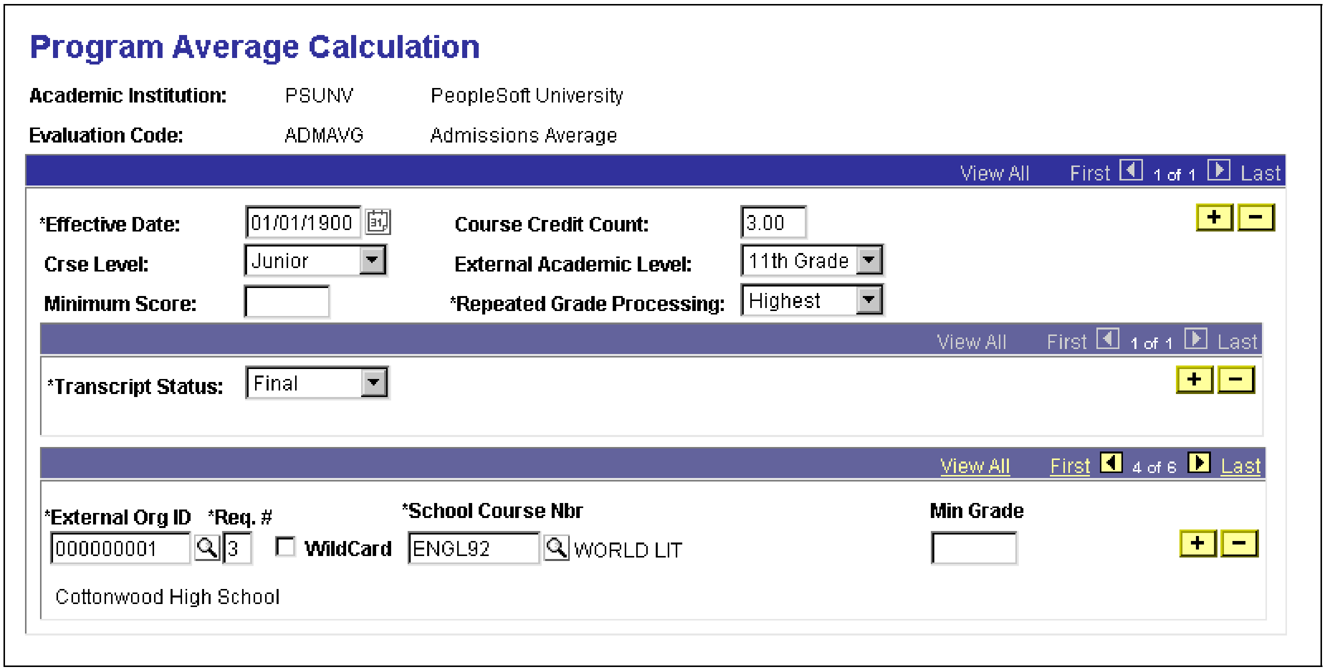
Example of Program Average Calculation page (1 of 4)

Select your second prerequisite in the School Course Nbr field and change the Req# to 2. This tells the system to treat this course as a separate course, and to use the grades that the applicant earned in both of these courses in the calculation. Then insert a row as follows:



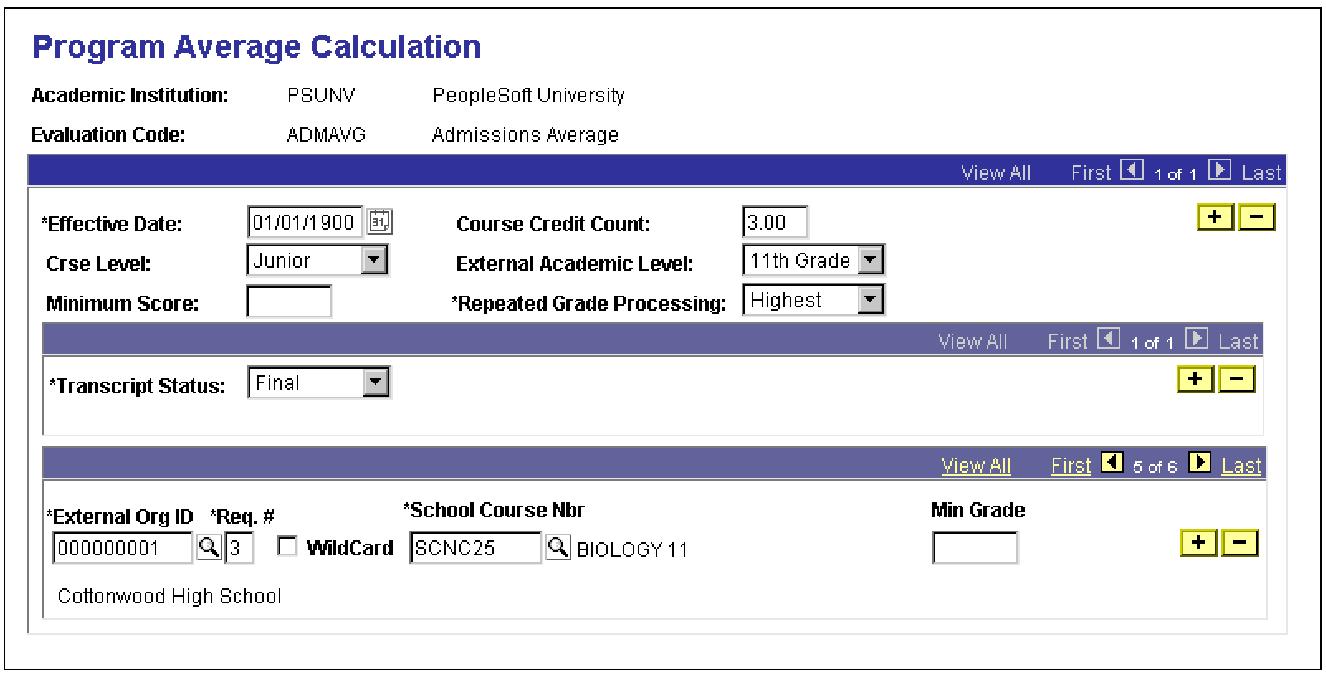
Example of Program Average Calculation page (2 of 4)

Enter a third course in the School Course Nbr field and change the Req# to 3. Then, insert two more rows and select the remaining two courses, but keep the Req# the same.



Example ofProgram Average Calculation page (3 of 4)

Note in page shot 3 of 4 that Req# is still 3, but you selected a second course.



Example of Program Average Calculation page (4 of 4)

Note in page shot 4 of 4 that Req.# is still 3, but you selected a third course. Because there are three courses with the Req.# of 3, the process only uses one of the courses in the calculation. If the applicant took only one of the courses, the system would use that course. If the applicant took more than one of these courses, the system treats the courses as repeated and selects a class to use in the calculation process based on the option selected in the Repeated Grade Processing field.

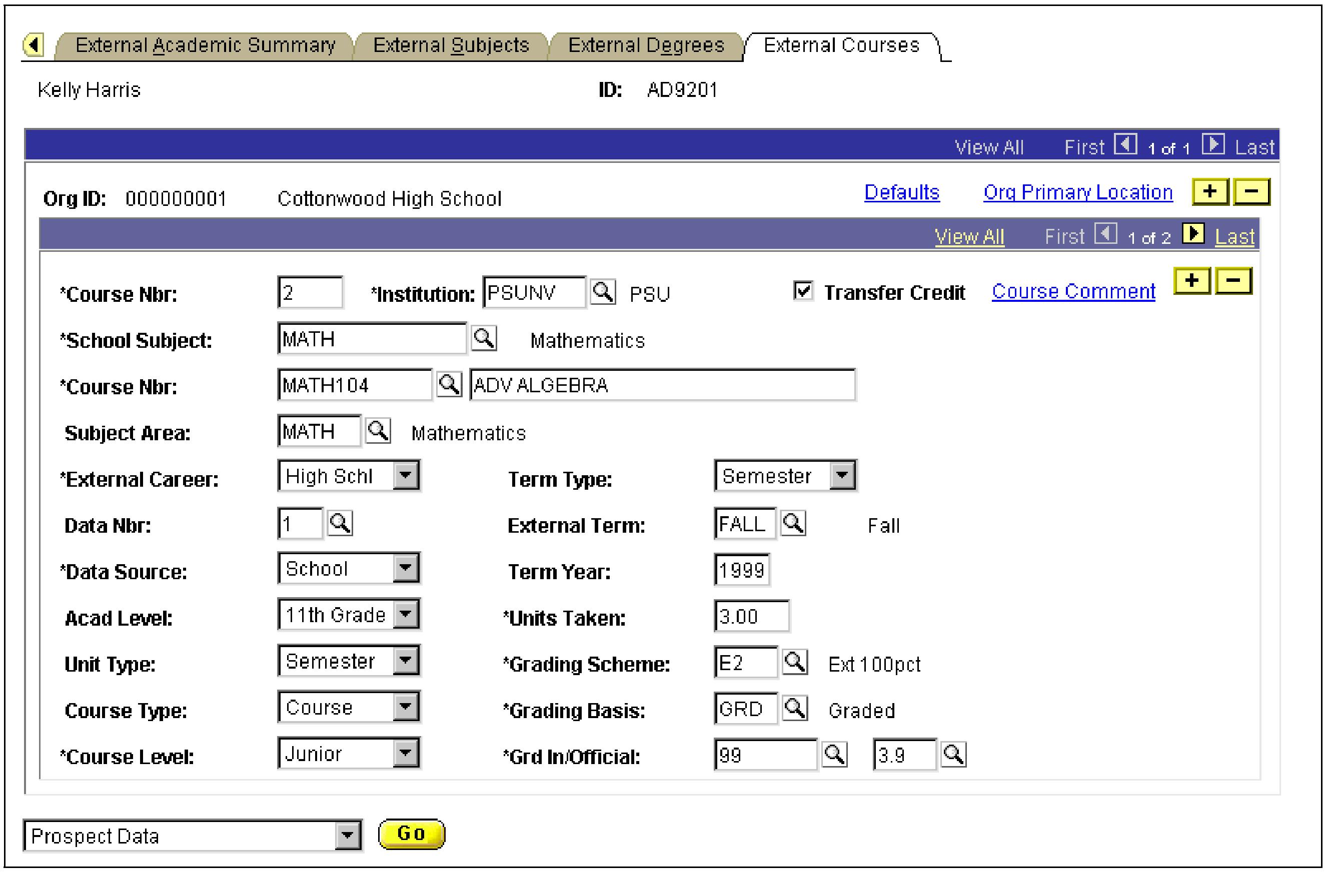
The system averages the scores of ENGL70 and MATH104, and the Highest of ENGL100, ENGL92, and SCNC25. From here, go to the Evaluation Calculation page to run the process and then to the Overall Rating page to view the result in the Rating Value field.

Viewing an External Courses and Admissions Averages Example

The courses that you select on the Program Average Calculation page are assigned to the student on the External Courses page. The calculation process looks at the External Courses page for each student to determine which courses to use in the calculation.

The following example represents an external course for an applicant.

Select Develop Enrollment, Process Applications, Use, Education.



Example of the External Courses page

For this course to be included in the average calculation, the Course Nbr (course number) field on the External Courses page must correspond with the School Course Nbr (school course number) field on the Program Average Calculation page. If you choose a course level and external academic level on the Program Average Calculation page, the process compares that to the Course Level field and Acad Level (academic level) field on this page. If there is a match, then this course is included in the average calculation. The SQL goes down each course on the applicant's record to look for a match based on the criteria that you set up.

The system uses the translated value in the field to the right of the Grd In/Official (grade in/official) field for the average calculation. The average calculation only runs for numeric grades. The average calculation converts non-numeric grades into numeric grades to be used in the average.

Running the Application Materials Extract Process

Before you can run the Evaluation Calculation process you must run a process to link all or a portion of a person's application materials to an application, or you must link the materials manually through the Application Materials page. These materials can then be used for evaluating the application. The Application Materials Extract process extracts the materials associated with the rating scheme that is assigned to the evaluation code. Evaluation codes must be assigned to the applicant on the Application Evaluation page so the Application Materials Extract process knows which records to extract. Ensure that the admissions evaluation code is assigned to the applicants before running the extract process or before linking the materials manually.

See Also

Chapter 20, "Evaluating Applicants Using Automatic Processing," Linking Application Materials to Applications in Batch, page 381

Chapter 12, "Tracking General Materials for Prospects and Applicants," Entering General Materials for Prospects and Applicants, page 133

Evaluating Applicants Based on Admissions Averages

Once you have properly flagged the external course grades to include in the average calculation—by setting up the rules for the SQC—you can run the Evaluation Calculation process (ADMTLRTG). To run this process, select an evaluation code. By selecting an evaluation code you call the rating scheme (which is tied to the evaluation code). When you defined the rating scheme in an earlier step, you entered the averages SQC. Thus, running the Evaluation Calculation process performs the average calculation.

After the process calculates the average, you can view the result. But if the process encountered an error, you can view the error messages online, correct the error, and re-run the process.

To evaluate applicants based on admissions averages:

- Run the Evaluation Calculation process.
- View the average.
- Correct admissions calculation errors.
- View the admissions calculation errors if necessary.

Page Used to Evaluate Applicants Based on Admissions Averages

Page Name	Object Name	Navigation	Usage
Avg Prcs Msg Tbl (average process message table)	AVG_PRCS_MSG_TBL	Develop Enrollment, Evaluate Applicants, Inquire, Average Calculations Messages, Avg Prcs Msg Tbl	View admissions calculation errors.

Running the Evaluation Calculation Process

Use the Evaluation Calculation page to calculate the admissions average. This process updates the Rating Value field on the Overall Rating page with the newly calculated average.

Enter the evaluation code that calls the appropriate admissions average rating scheme. The rating scheme that you select here must contain the admissions average rating component (ADAVG) and SQC (ADEVLAVG) to calculate the admissions average.

See Also

Chapter 20, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 382

Viewing the Newly Calculated Average

Use the Overall Rating page to view the newly calculated average. After you run the Evaluation Calculation process with the delivered averages SQC (ADEVLAVG), the resulting average appears on this page in the Rating Value field. However, the average only appears on this page when the system successfully calculates the average. If the Evaluated check box is selected but there is no value in the Rating Value field, an error was encountered during the process. The next section describes how to view admissions calculation errors.

See Also

Chapter 19, "Evaluating Applicants," Creating Application Evaluations, page 365

Correcting Admissions Calculation Errors

The Evaluation Calculation process runs for every applicant who has been assigned the evaluation code for which you are running the process. Sometimes an applicant who has been assigned the evaluation code does not meet all of the criteria for calculating an average that you select. For example, if you specify that applicants must have taken the course SCNC100 to be given an average, and an applicant who has been assigned the evaluation code for which you run the Evaluation Calculation process has not taken this course, the process does not generate an average. Instead, the Evaluation Calculation process generates an error message that tells you why it did not generate an average.

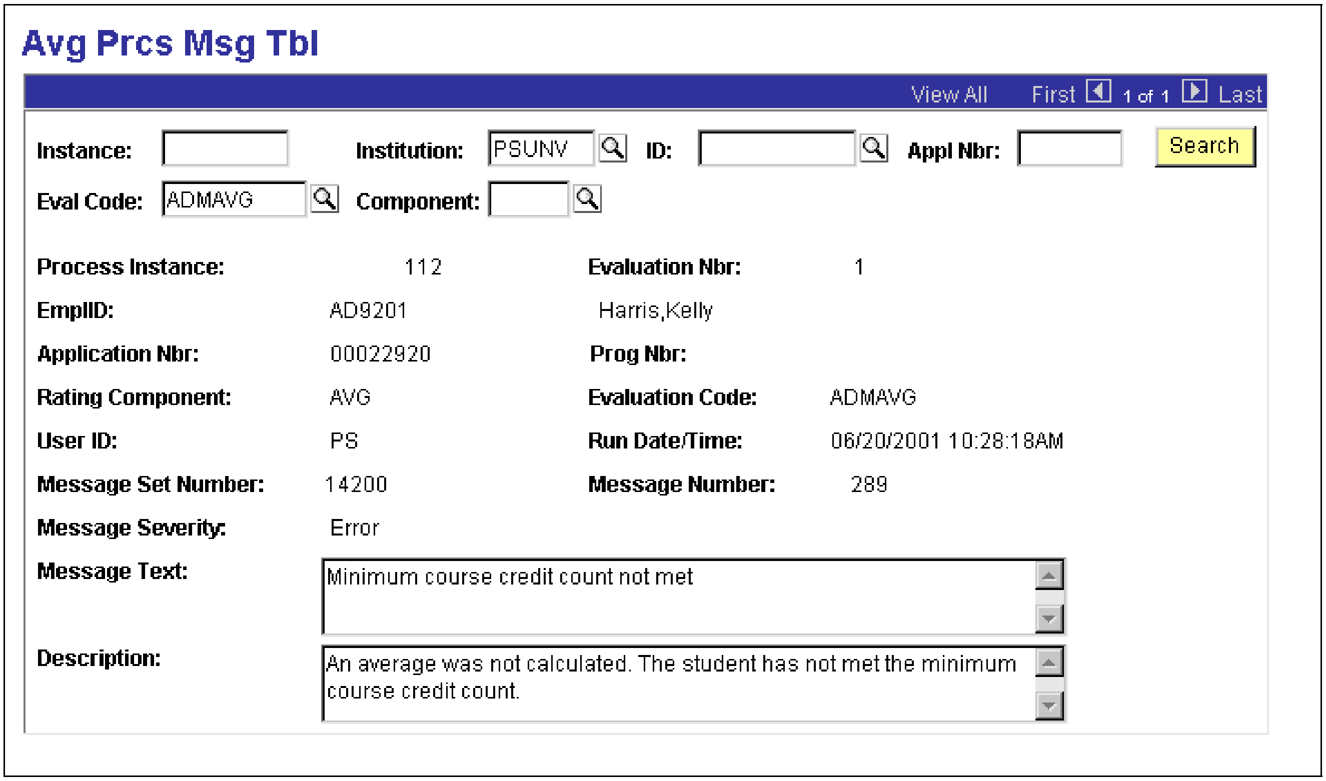
You know that an error occurred when the Evaluated check box is selected but there is no value in the Rating Value field on the Overall Rating page. View Admissions Calculation Errors on the Avg Prcs Msg Tbl (average process message table) page.

See Also

Chapter 19, "Evaluating Applicants," Creating Application Evaluations, page 365

Viewing Admissions Calculation Errors

Access the Avg Prcs Msg Tbl page.



Avg Prcs Msg Tbl page

Note. You must enter at least one search parameter in addition to institution.

Instance — Enter a process instance. Each time the evaluation process runs, the system assign a number to that specific instance. Enter a process instance number to search for error messages generated during that instance of the process.

ID — Select a student's identification number. The system looks for any error messages that the system generated when calculating averages for this ID.

Appl Nbr (application number) — Enter an application number. The system looks for any error messages that the Evaluation Calculation process generated when calculating averages for this application number.

Eval Code (evaluation code) — Select an evaluation code. The system looks for error messages that the Evaluation Calculation process generated for this evaluation code.

Component — Select a rating component. The system looks for error messages that the Evaluation Calculation process generated for this rating component.

Search — Click this button to search for messages using the criteria you select.

Error Messages

There are three error messages delivered with the application. The process generates error messages when an applicant who has been assigned the evaluation code does not meet the criteria you specified for the admissions SQC on the Avg Prog Calc page.

- Minimum course credit count not met.

Description: "An average was not calculated because the student has not met the minimum course credit count."

Example: You enter 60 in the Course Credit Count field on the AVG Prog Calc page but the applicant's total course credit count only equals 58.

Description: "An average was not calculated because the student has not met the minimum grade requirement."

Example: You select 2.0 in the Minimum Score field. The applicant took the prerequisites you specified but did not achieve a grade of 2.0 in that course.

- Program prerequisites have not been met.

  Description: "An average was not calculated because the student does not have the necessary courses to meet the program prerequisites."

  Example: You entered the prerequisite SCNC10 in the School Course Nbr field on the Avg Prog Calc page but this course is not listed on this applicant's external course record.

Running the Application Status Update Process

Use the Application Status Update page to update the application statuses of those applicants for whom the Evaluation Calculation generated an admissions average. These are applicants who were assigned the admissions average evaluation code and who met all of the SQC criteria that you specified on the Program Average Calculation page. This process also updates the Averages for Fin. Aid and Recs page.

Select the evaluation code that contains the admissions average rating scheme. This is the same evaluation code that you used to run the Evaluation Calculation process. The application status update process uses the result from the Evaluation Calculation process to update the applicant's application status.

Note. An SQC defined by your institution determines the status of the application based on the sum of the final evaluation calculation values.

The application status update process also updates the Program Action field on the Application Program Data page.

See Also

Chapter 20, "Evaluating Applicants Using Automatic Processing," page 377

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 165

Updating Admissions Averages for Financial Aid and Student Records

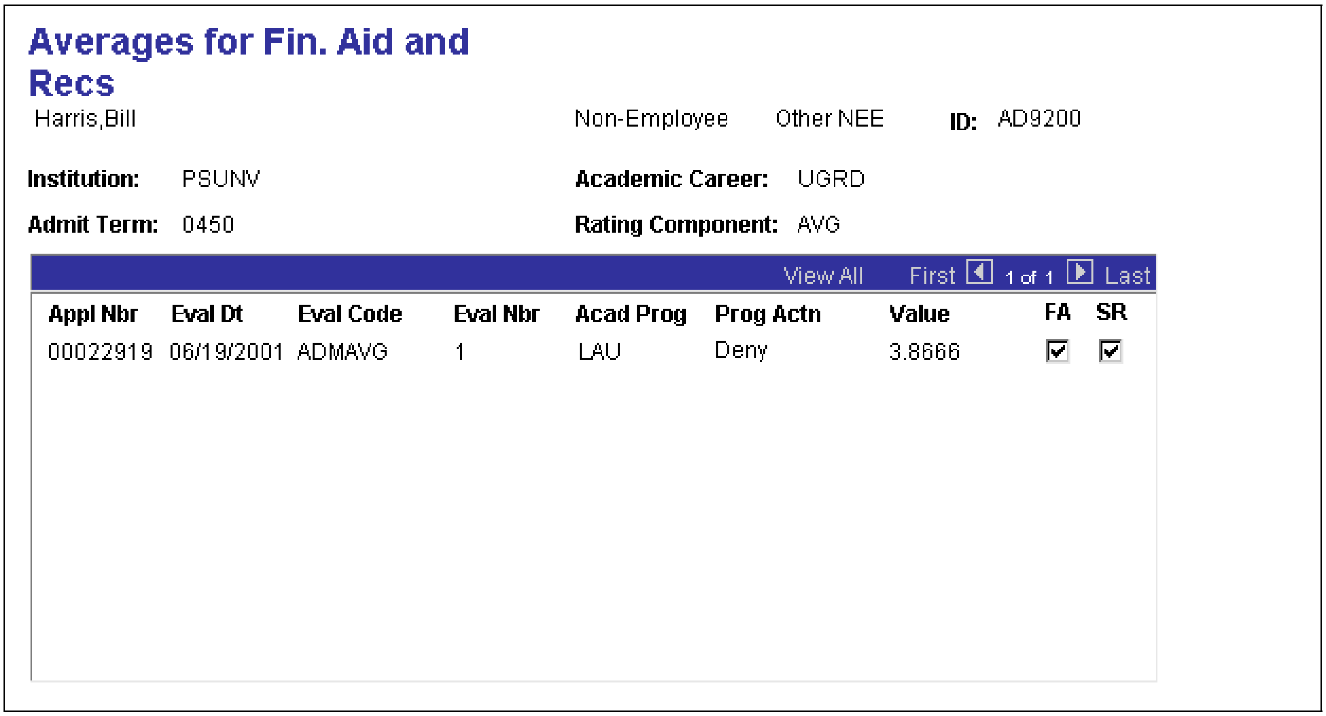
The section discusses how to update admissions averages for financial aid and student records.

Page Used to Update Admissions Averages for Financial Aid and Student Records

Page Name	Object Name	Navigation	Usage
Averages for Fin. Aid and Recs (averages for financial aid and records)	ADM_EVAL_FA_SR_PNL	Develop Enrollment, Evaluate Applicants, Use, Avgs for Fin. Aid and Recs, Averages for Fin. Aid and Recs	Update admissions averages in PeopleSoft Financial Aid and PeopleSoft Student Records.

Using the Averages for Fin. Aid and Recs Page

Access the Averages for Fin. Aid and Recs page.



Averages for Fin. Aid and Recs page

There are two ways financial aid and student records personnel can use admissions averages. The first way is to access this page and view the averages for specific applicants.

However, if you want to update PeopleSoft Financial Aid and PeopleSoft Student Records automatically, you can write SQRs that extract the information from PeopleSoft Recruiting and Admissions. First, write an SQR to turn on or off the FA (financial aid) and SR (student records) check boxes. This SQR tells the system which application numbers you want to make available to PeopleSoft Financial Aid and PeopleSoft Student Records. Second, write an SQR to extract the admissions average data. The SQR(s) that you write should extract the averages and send them to PeopleSoft Financial Aid to be used in determining awards, and to PeopleSoft Student Records so the averages travel with the applicant throughout his or her career at your organization.

CHAPTER 23

Using Admissions Average Cutoff Reports

This chapter provides an overview of the admissions average cutoff report and discusses how to generate the report.

Understanding the Admissions Averages Cutoff Report

PeopleSoft Recruiting and Admissions enables you to assess an evaluated applicant pool to determine the admissions average that drive certain program actions. For example, you might need to know how many applicants within an evaluation code, who have admissions averages between 85 and 100, have the program action of ADMT.

To generate an admissions average cutoff report:

1. Set up the criteria that determine the content of the report.

   The report tallies the number of applicants who:

   - Are assigned the specified evaluation code, have an admissions average that falls within the range, and have the appropriate program action based on the range you define, and
   - Are assigned the specified evaluation code, have an admissions average that falls within a defined range, but do not have the appropriate program action based on the range you define, and
   - Are assigned the specified evaluation code (the total number of applicants assigned this evaluation code).
2. Run the average cutoff report process (ADAVGCUT.sqr).

   The process retrieves the rating component that is attached to the admissions average SQC (ADEVLAVG.sqc). Next, the process tallies applicants based on the program actions and value ranges that you specified on the Average Cutoff Report page. Finally, the process generates a report according to your Process Scheduler settings and calls it adavagcut.lis.

Generating Admissions Average Cutoff Reports

This section discusses how to:

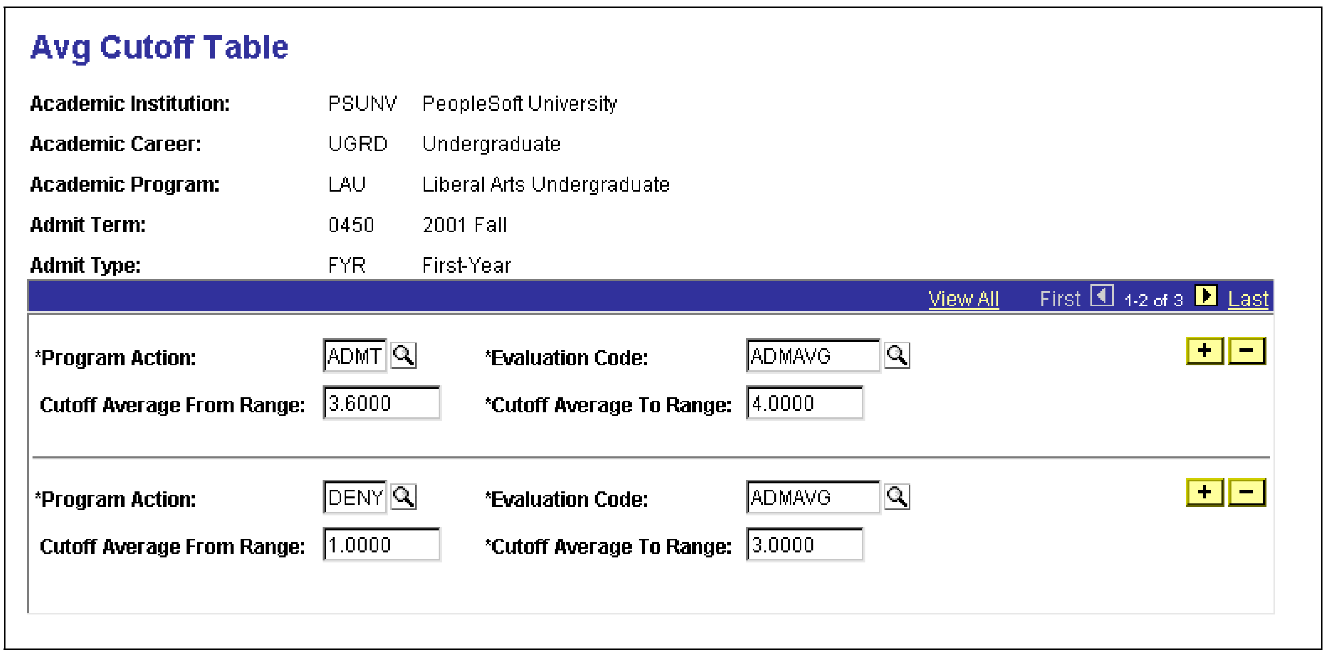
- Set up the average cutoff table.
- Generate the Admissions Average Cutoff report.

Pages Used to Generate Admissions Average Cutoff Reports

Page Name	Object Name	Navigation	Usage
Avg Cutoff Table (average cutoff table)	AVG_CUTOFF_TABLE	Develop Enrollment, Evaluate Applicants, Setup, Average Cutoff Table, Avg Cutoff Table	Set up the criteria that you want the system to report.
Average Cutoff Report	RUNCTL_ADAVGCUT	Develop Enrollment, Evaluate Applicants, Reports, Average Cutoff Report, Average Cutoff Report	Run the average cutoff report.

Setting up the Average Cutoff Table

Access the Avg Cutoff Table page.



Avg Cutoff Table page

Program Action

Enter the program action that an applicant should be assigned if his or her average falls within the range that you enter. The report displays the number of applicants whose average falls within this range but *are not* assigned this program action, as well as those who fall within the range and who *are* assigned this program action.

Evaluation Code

Enter the evaluation code for which you want to generate a cutoff report. The system only queries applications that are assigned the evaluation code that you enter here for the program action and average range.

Cutoff Average from Range

Enter the minimum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.

Cutoff Average to Range Enter the maximum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.

In the previous page shot, all applications to the undergraduate liberal arts program for admit term Fall 2001 with the first year admit type, that are assigned the evaluation code ADMAVG and that have an average between 3.6 and 4.0 inclusive appears on the report under the program action of “Admit.” Those applications with an average between 1.0 and 3.0 inclusive appears on the report under the program action of “Deny.”

See Also

Appendix A, “PeopleSoft Recruiting and Admissions Reports,” PeopleSoft Recruiting and Admissions Reports: Selected Reports, page 476

CHAPTER 24

Creating Alternate Program Offers

This chapter provides an overview of alternate program offers and discusses how to:

- Assign alternate evaluation codes.
- Select applicants for alternate offers.
- Assign alternate programs.

Understanding Alternate Program Offers

When applicants do not meet the requirements for their requested program, you can evaluate them in alternate programs, thereby giving them a second chance to attend your organization. For example, an applicant might get denied to your highly competitive engineering program but when re-evaluated for a less competitive program the same applicant might get accepted.

To create alternate program offers you must first assign an alternate academic program and an alternate evaluation code. You select the primary academic program to which the person is applying (such as FAU), and then specify the alternate program (such as LAU). Thus, all applicants who get denied or waitlisted for FAU, in this example, get evaluated in the LAU program.

After you have assigned alternate program evaluation codes, you run the Assign Alternate Eval Codes process (ADALTEVL.sqr) that assigns alternate evaluation codes to applicants. You will select applicants based on academic institution, the academic program that they requested, and the admit term. For example, if you select the program LAU and admit term 0450, the process will assign an alternate evaluation code to applicants who applied to but were denied or waitlisted to LAU in Fall 2001.

After you have assigned alternate evaluation codes to applicants, you must either run the materials extract process, or assign the materials manually. Then you must run the Evaluation Calculation process to evaluate them in the new program using the new evaluation code that you just assigned to them.

Once the Evaluation Calculation process calculates the overall rating score, you run the Alternate Programs process (ADALTPRG.sqr). The Alternate Programs process compares the minimum rating score that you define to the overall rating score that the Evaluation Calculation process calculates. If the applicant meets the criteria, the Alternate Programs process inserts a new row in the person's application (adm_appl_prog) for the existing application number and assigns a new program number. Thus, you still have access to the application in which the person was denied or waitlisted.

Assigning Alternate Evaluation Codes

This section discusses how to assign alternate evaluation codes.

Page Used to Assign Alternate Evaluation Codes

Page Name	Object Name	Navigation	Usage
Alternate Offer Table	ALT_OFFER_TABLE	Develop Enrollment, Evaluate Applicants, Setup, Alternate Offer Table, Alternate Offer Table	Assign alternate offer program evaluation codes to academic programs.

Using the Alternate Offer Table Page

Access the Alternate Offer Table page.

Alternate Academic Program

Enter the alternate program. Any person who applies and is either denied or waitlisted to the academic program that you specified upon entering this page will be evaluated in the alternate program that you enter here. For example, you can set it up so that any person applying to LAU, who is denied or waitlisted in that program, will be evaluated in *FAU* using the *ACT* evaluation code.

Alternate Evaluation Code

Enter the evaluation code the system will use to evaluate the applicant in the alternate program. For example, an applicant who was denied or waitlisted in the undergraduate engineering program using the UGENG evaluation code may be accepted into the Liberal Arts program using the ACT evaluation code. Define alternate evaluation codes on the Evaluation Table page.

Selecting Applicants for Alternate Offers

This section discusses how to select applicants for alternate offers.

Page Used to Select Applicants for Alternate Offers

Page Name	Object Name	Navigation	Usage
Assign Alternate Eval Codes (assign alternate evaluation codes) - Parameters	RUNCTL_ADALTEVL	Develop Enrollment, Evaluate Applicants, Process, Assign Alternate Eval. Codes, Parameters	Run the Alternate Averages process. The process assigns the alternate evaluation code that you set up on the Alternate Offer Table page to any applicants who applied to the academic institution and academic program for the admit term that you select.

Using the Assign Alternate Eval Codes - Parameters Page

Access the Assign Alternate Eval Codes (assign alternate evaluation codes) - Parameters page.

Institution Enter the academic institution to which the academic program belongs.

Academic Program Enter the academic program. This is the original academic program to which the applicants applied but into which they were not admitted. The process assigns the alternate evaluation code to any applicant who applied to this academic program—in the admit term you specify—and has a program action of *Deny, Waitlist,* or *Waitlist Offer Accepted.*

If a student meets the above criteria but already has an application to the alternate program, the Alternate Averages process *does not* assign the alternate program code.

Admit Term The process only assigns the alternate evaluation code to applicants who were denied or waitlisted in this term.

Click Run to run the Alternate Averages process at user-defined intervals.

Assigning Alternate Programs

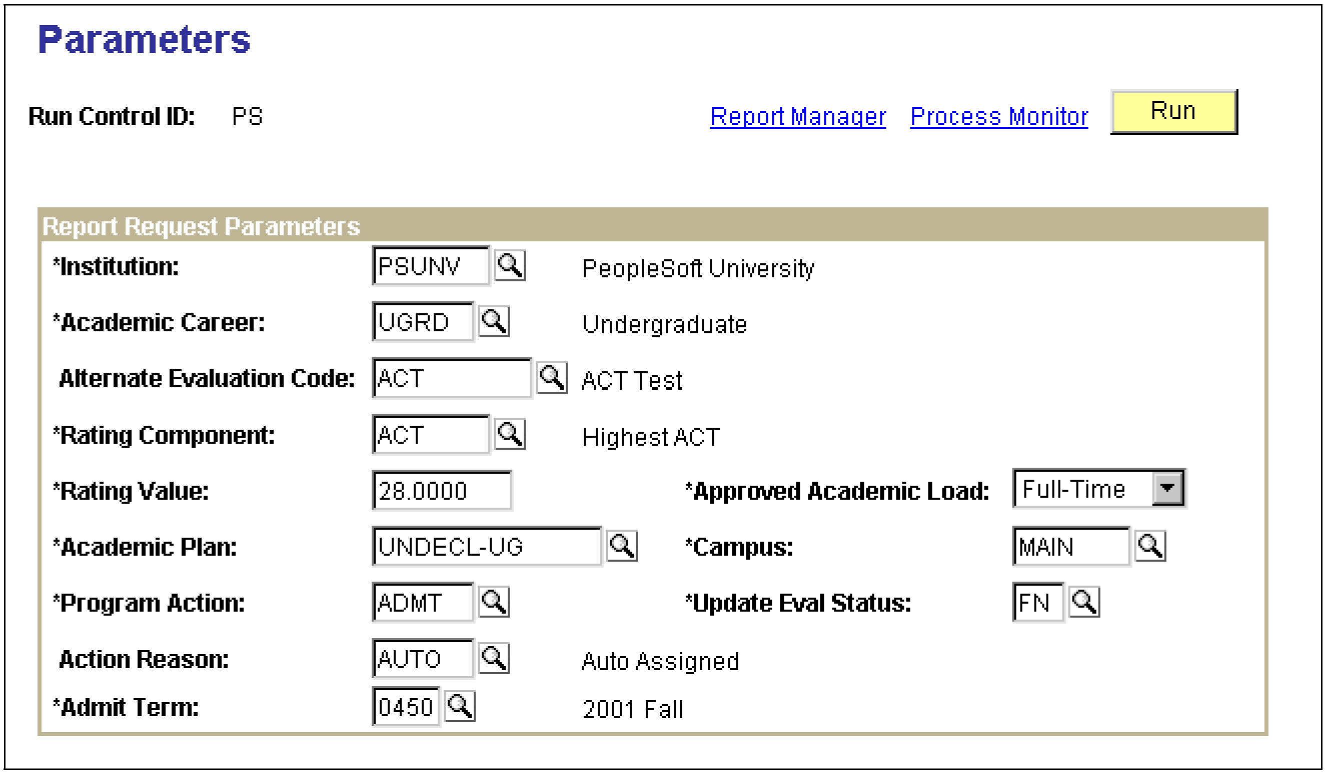
This section discusses how to run the Alternate Programs process to assign alternate programs, and provides an example of how alternate programs are assigned to students.

Page Used to Assigning Alternate Programs

Page Name	Object Name	Navigation	Usage
Alternate Program Addition - Parameters	RUNCTL_ADALTPRG	Develop Enrollment, Evaluate Applicants, Process, Alternate Program Addition, Parameters	Run the Alternate Programs process. The Alternate Programs process updates applications by comparing the minimum score that you enter on this page to the overall rating that the Evaluation Calculation process calculates. The Alternate Programs process uses the information that you define on this page to update information in the new application row.

Running the Alternate Programs Process

Access the Alternate Program Addition - Parameters page.



Alternate Program Addition - Parameters page

Institution

Enter the academic institution for which you want to run the process.

Academic Career

Enter the academic career for the alternate academic program.

Alternate Evaluation Code

Enter the alternate evaluation code that is assigned to the applicants to be evaluated. The Alternate Programs process updates the applications of only those applicants who have been assigned this alternate evaluation code. Therefore, you must have already run the Alternate Eval Code process to assign applicants an alternate evaluation code. Define alternate evaluation codes on the Evaluation Table page.

Rating Component

Enter the rating component that you want to use to evaluate applicants. The rating component defines the format and meaning of the rating value. For example, in the preceding page shot, you selected the ACT rating component. The rating value therefore represents the minimum ACT score that can be admitted into the alternate program.

Rating Value

Enter the minimum score for consideration in the alternate program. The Alternate Programs process compares this score to the overall rating value that the Evaluation Calculation process calculates. If the overall rating value is equal to or more than the value you enter in this field, then the applicant is accepted into the alternate program. In the above example, the applicant must score at least 27 on the ACT to be accepted into the alternate program.

See Chapter 24, “Creating Alternate Program Offers,” Assigning Alternate Programs, page 417.

Note. Once an applicant is accepted into the alternate program, the Alternate Programs process creates a new row in the person's application (adm_appl_prog) for the existing application number. The system assigns a new program number for the new program and plan into which the person was accepted.

Approved Academic Load
Enter the academic load that you want the process to assign to anyone who meets the criteria defined on this page.

Academic Plan
Enter the academic plan that you want the process to assign to anyone who meets the criteria defined on this page.

Campus
Enter the campus that you want the process assign to anyone who meets the criteria defined on this page.

Program Action
Enter the program action that you want the process assign to anyone who meets the criteria defined on this page.

Update Eval Status (update evaluation status)
Enter the evaluation status that you want the process to assign to anyone who meets the criteria defined on this page.

Action Reason
Enter the action reason that you want the process to assign to anyone who meets the criteria defined on this page.

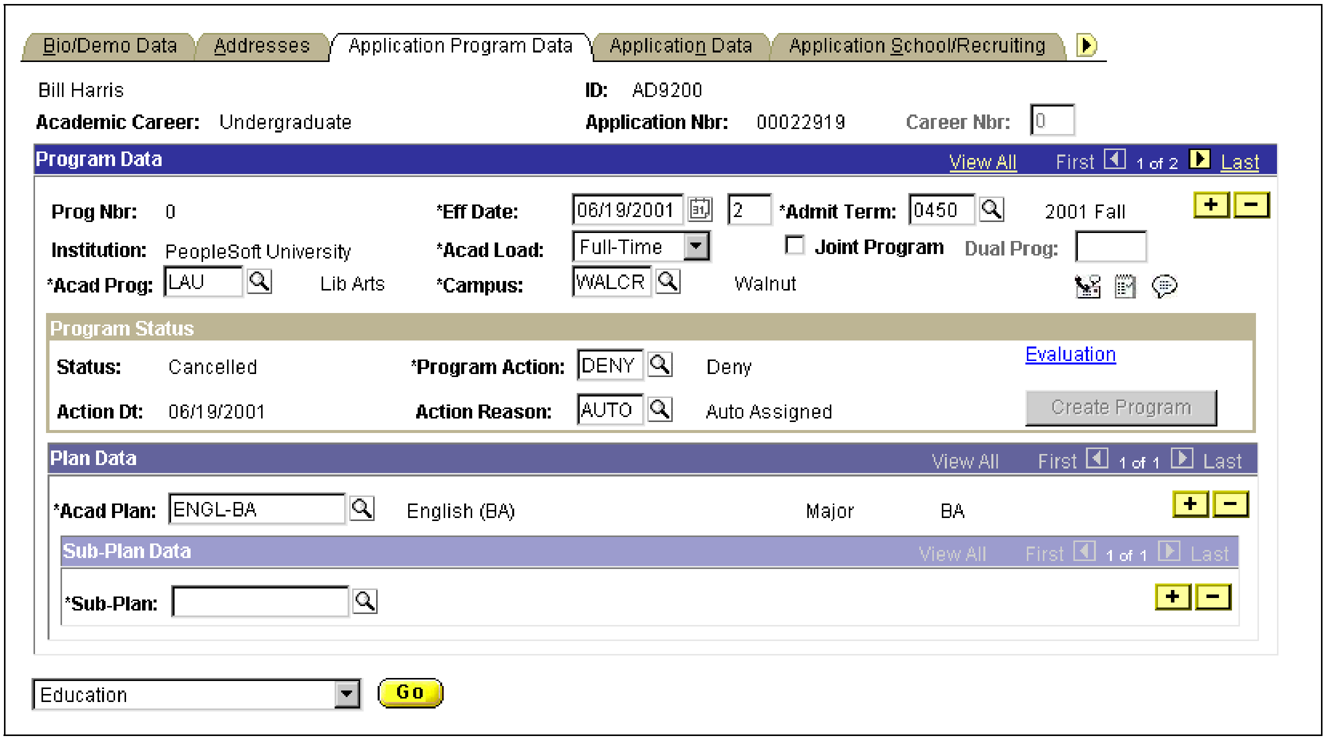
Admit Term
Enter the admit term that you want the system to assign to anyone who meets the criteria defined on this page.

In the above example, applicants to the undergraduate career at PSUNV with an alternate evaluation code of *ACT* and an ACT score of at least *27* will receive a program action of *Admit*.

Click Run to run the Alternate Programs process at user-defined intervals.

Viewing an Example of How Alternate Programs are Assigned to Students

The following person applied and was denied to the FAU program. Note that the program number is *0,* the academic program is *FAU,* and the program action is *DENY.*



Alternate Offer Example (1 of 3)

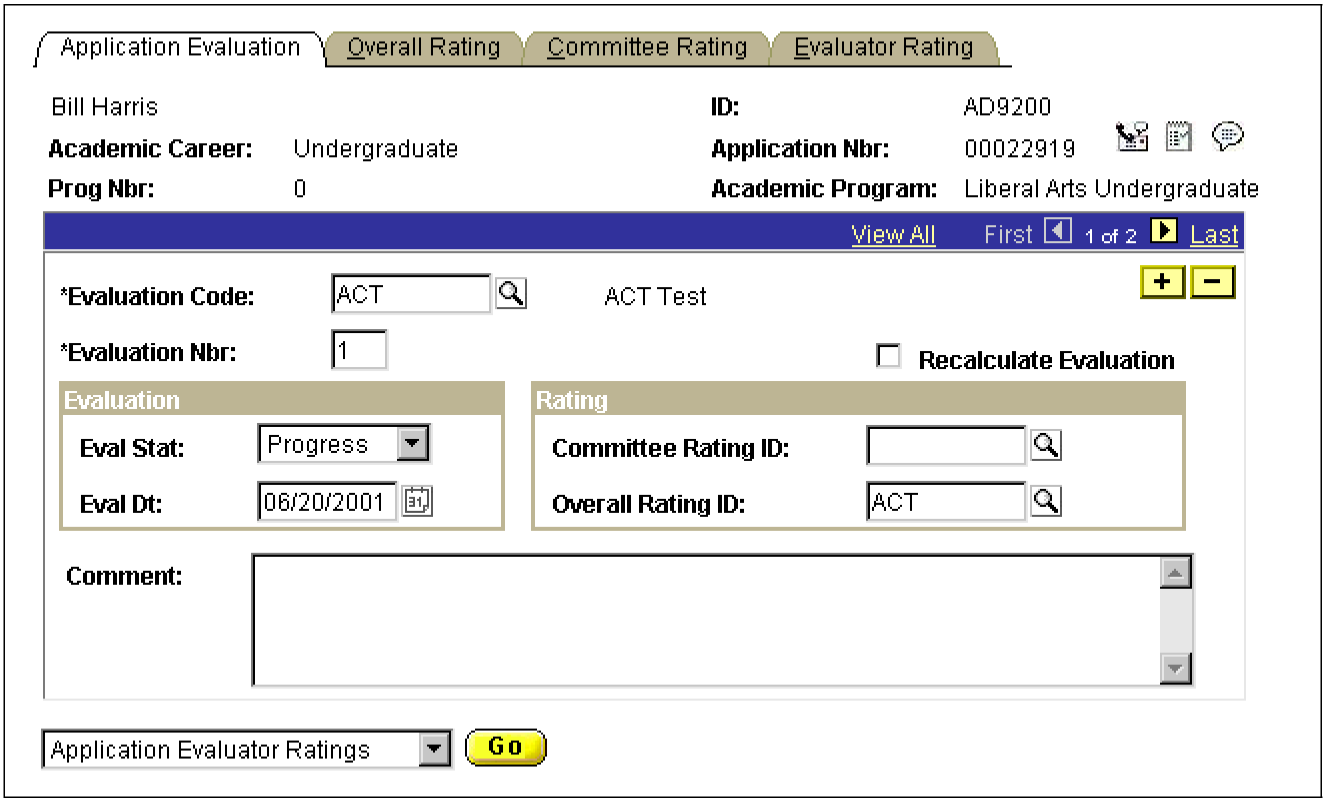
- First, you set up the Alternate Offer Table page, which enables applicants who were denied or waitlisted in LAU to be evaluated in FAU.

  See Chapter 24, “Creating Alternate Program Offers,” Assigning Alternate Evaluation Codes, page 416.

- Then you run the Alternate Averages process (ADALTEVL.sqr).

  See Chapter 24, “Creating Alternate Program Offers,” Selecting Applicants for Alternate Offers, page 416.

The Alternate Averages process assigns an alternate evaluation code (ACT) to the person’s application, as illustrated in the following page shot.



Alternate Offer Example (2 of 3)

Note in the page above that the evaluation code now reads *ACT.*

- This new evaluation code has not been evaluated through the Evaluation Calculation process.

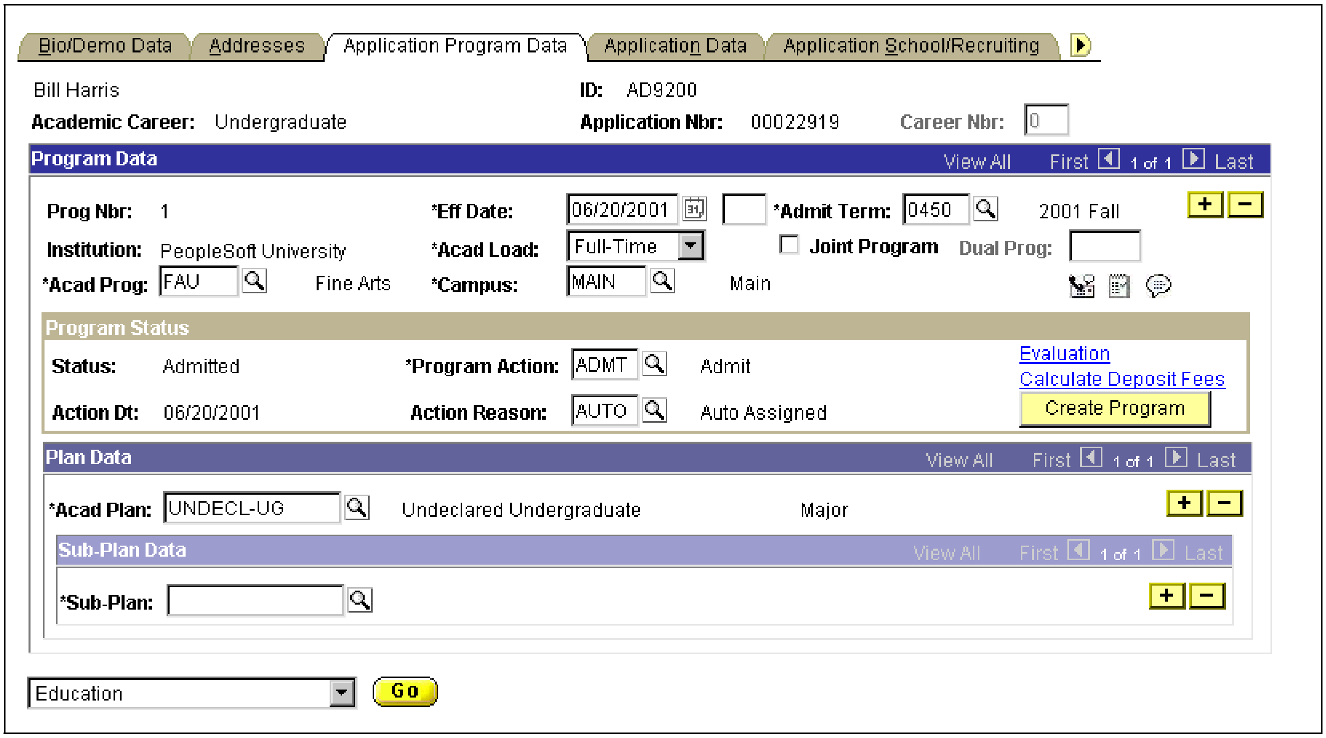
  Therefore, you ran the Materials Extract process to extract the application data, and then you ran the Evaluation Calculation process to calculate the overall rating score based on the rating components for the ACT evaluation code.

  See Chapter 20, "Evaluating Applicants Using Automatic Processing," Linking Application Materials to Applications in Batch, page 381.

  See Chapter 20, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 382.

- Next you run the Alternate Program process (ADALTPRG.sqr), which compares the minimum score that you enter on the Alternate Program Addition - Parameters page to the overall rating score that the Evaluation Calculation process calculates.

The applicant in our example was denied in his requested program (LAU), but was accepted into the alternate program (FAU), as illustrated in the following page shot.



Alternate Offer Example (3 of 3)

Note that the program number is now *1*. The Alternate Programs process inserted a new row and incremented the program number by one. Thus, the program action of *DENY* for LAU still exists in the student's record. This new row contains the new academic program *FAU* (the alternate program) and note that the program action is *ADMT.* The Alternate Programs process also updated the remaining parameters that you selected on the Alternate Program Addition - Parameters page, such as the action reason, campus, academic load, and so forth.

By evaluating this applicant in an alternate program, you were able to admit a person whom you would have otherwise denied.

CHAPTER 25

Updating Application Program Actions and Statuses

This chapter provides an overview of admissions program actions and statuses and discusses how to:

- Update the program action and status of one application.
- Update program actions and statuses of multiple applications.
- Update program actions and statuses using mass change.

Understanding Admissions Program Actions and Statuses

As applicants move through the admissions process, you must take action on their academic program and update their program status. You can update a single application, a group of applications, or you can use a mass change definition to update a large number of applications. When you enter new program actions, you will enter new effective dates. Thus, you can maintain a history of previous actions.

As you begin using program actions and statuses provided with PeopleSoft Recruiting and Admissions, start with the most straightforward cases to become accustomed to the process. Then begin to work on the special cases, such as deferrals, reconsiderations, and so forth.

Program status is the high level relationship a person has with an academic program. When you select a program action to change an applicant's program data, the program status often changes. Thus, the Program Action field in the Application Program Data page contains different rows of program data for a student. For example, a student goes from being an applicant to being admitted.

A *program action* is a change to a person's program data. An *action reason* indicates why a particular program action was taken, or offers a further description of the program action. For example, you can record that an applicant has withdrawn an application for an academic program. The reason you enter could be *After Decision* or *Before Decision.*

For your reference, the program actions and program statuses relevant to admissions are explained in the following table:

If you Select this Program Action:	The System Updates the Program Status to:
Application Readmit Application Reconsideration	Applicant
Waitlist Waitlist Offer	Waitlisted
Admit Conditional Admit	Admitted
Admission Revocation Deny Administrative Withdrawal Applicant Withdrawal	Cancelled
Intention to Matriculate	Prematriculant
Matriculation	Active
Data Change Defer Decision Defer Enrollment Plan Change Program Change	The same Program Status as the previous row.

Program Status values are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values require a substantial programming effort. You can, however, modify the *descriptions* of these values. Keep in mind, though, that the altered description needs to retain its original meaning to avoid confusion.

The Program Status values delivered with your system that are relevant to admissions, along with their *original* descriptions, are:

- AC—Active in Program
- AD—Admitted
- AP—Applicant
- CN—Cancelled

- DE—Deceased
- PM—Prematriculant
- WT—Waitlisted

Reviewing Admissions Program Action Definitions

The previous section details which admissions program actions set which program statuses. The chart below lists Program Action definitions and provides additional information about what happens when you choose a Program Action. Also, if any action triggers or requires an additional step, those requirements are described here.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Application	A person has an application that is under consideration by an academic program.	None.
Readmit Application	A person has applied to reenter a student career and academic program for which he or she already has a student record.	When you choose this action, the Career Number field becomes available for input. You must select which student record should be populated with the readmit information if the student ends up enrolling again. Additionally, if you enter this action, the admit type you enter on the Application Data page must be one associated with readmit processing.
Reconsideration	A person who has a cancelled status for the academic program, but is being reconsidered for admission in the same applicant pool.	Once an action of reconsideration is taken, you can admit the applicant. You cannot take an action of *Admit* if the program status is *Cancelled.* You must first select a *Reconsideration* action.
Waitlist	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. For example, there may not be enough space in the class. The candidate is currently active on the waitlist.	None.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Waitlist Offer	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. The candidate has been offered a place on a waitlist, but has not accepted that offer.	None.
Admit	A person has been evaluated and admitted into an academic program.	When a person has a status of admitted or higher, depending on your admit level setup, the Deposits link becomes available for input. If, in your application center, you use a deposit fee code that requires you to calculate a deposit, you must calculate an enrollment deposit before you can save the page. If your application's deposit fee code does not require you to calculate a deposit, or if you do not have a deposit fee code associated with your application center, you are not required to calculate a deposit. If an application was given a status of admit through the Application Status Update process, you can run the Calculate Deposits process to calculate an enrollment deposit for those applications.
Conditional Admit	A person has been evaluated and accepted into an academic program on a conditional basis. Along with a *Conditional Admit* action you can assign a checklist code to help track the outstanding requirements for the conditions of admission.	Same as for *Admit*.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Admission Revocation	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission. The individual was assigned a *Cancelled* status from an *Admitted* or *Active* status.	When revoking admission for a person who has a current action of *Matriculation,* and therefore an *Active* status, you must go to PeopleSoft Student Records to take this action. When you revoke admission from PeopleSoft Student Records, the Student Record program information is deleted and your application information is updated as *Cancelled Due to Admission Revocation.* If the person never had an action of matriculation, you can add an *Admission Revocation* action directly in PeopleSoft Recruiting and Admissions.
Deny	A person has been denied admission to an academic program.	None.
Administrative Withdrawal	A person's application to an academic program has been withdrawn from consideration for admission or from enrollment in a class. This can be done before or after an action of admit has been taken or after the applicant has achieved active status. In addition, reasons can be created to clarify when or why the application was withdrawn.	None.
Applicant Withdrawal	A person has withdrawn from consideration for admission or from the entering class. Reasons can be created to clarify when or why the withdrawal occurred. For example, an action of applicant withdrawal with *Before Decision* as the reason indicates the individual withdrew early enough in the process that no admission decision had been made. A *Waitlist Withdrawal* reason indicates someone who did not want to accept a place on the waitlist.	None.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Intention to Matriculate	A person has indicated intent to matriculate, but has not completed all the steps to become an active student. Reasons can be defined to clarify why the candidate is changed from an admitted status to a *Prematriculant* status. For example, if you require that an admitted student submit multiple deposits to secure a place in the class, after the first deposit is received, you might indicate an intention to matriculate action with a reason of *First Deposit.*	None.
Matriculation	A person has completed all necessary steps to become an active student in an academic program.	When you enter an action of *Matriculation,* you must click the Create Program button that creates a record for this person in PeopleSoft Student Records. You can not save the page until you click this button. Once you matriculate the applicant, the component is saved. Also, all fields become unavailable for input because this person now belongs to PeopleSoft Student Records.
Data Change	Data relative to an applicant's academic program was changed. This action records the fact that a change was made.	None.
Defer Decision	An evaluation was performed on an application, but a decision was not made. This action records the fact that an application has been evaluated. For example, a person applies under an early notification plan. The person is evaluated but does not meet the early decision criteria. The final decision is deferred until the regular decision deadline.	None.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Defer Enrollment	A person has been admitted and may be active for one admit term but will actually enroll in a later admit term. This action enables you to change the admit term for the applicant and record that he or she is deferring enrollment.	None.
Plan Change	The academic plan to which an applicant is applying was changed.	None.
Program Change	The academic program to which an applicant is applying was changed.	None.

Updating the Program Action and Status of One Application

Use the Application Program Data page to update the program action and status of one application. If you only have *one* application to update, do so through the Application Maintenance component.

See Also

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 165

Updating Program Actions and Statuses of Multiple Applications

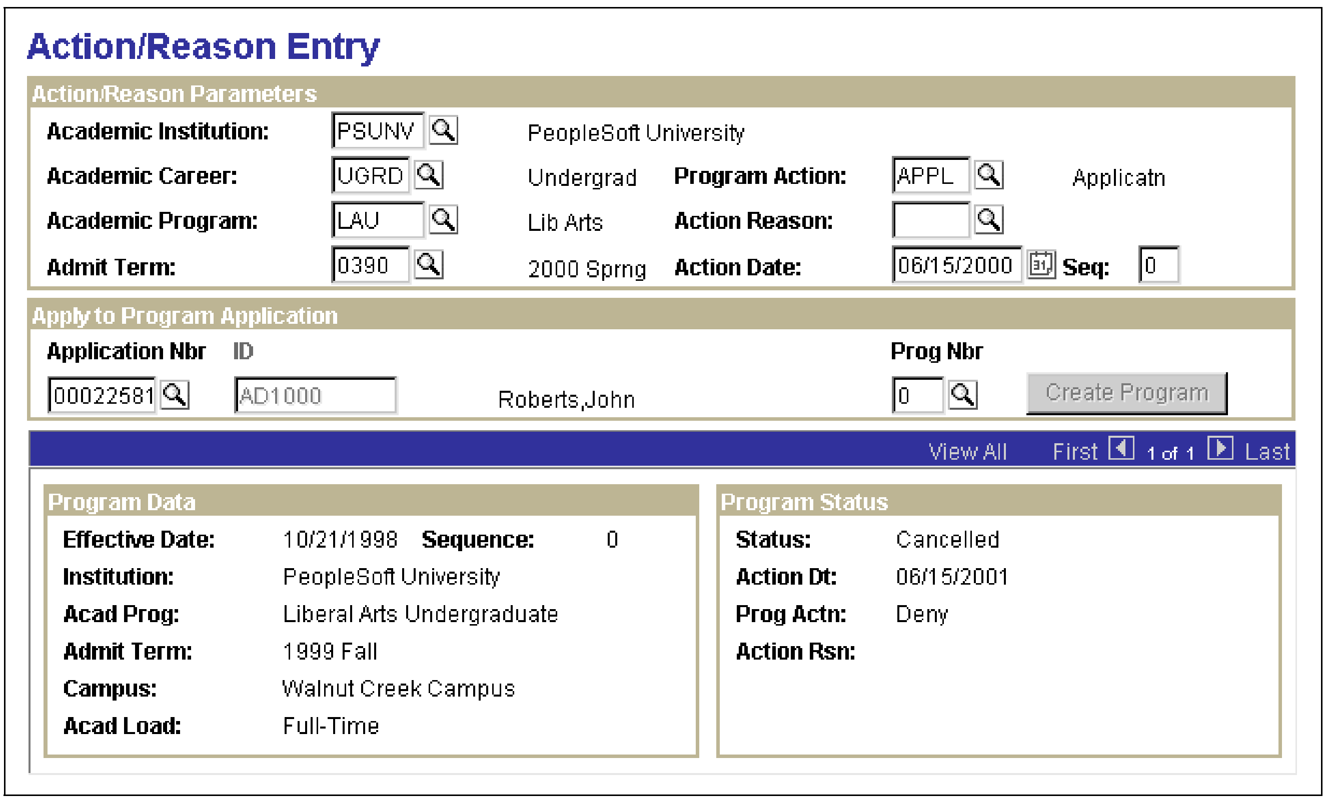
This section discusses how to update program actions and statuses of multiple applications online.

Page Used to Update Program Actions and Statuses of Multiple Applications

Page Name	Object Name	Navigation	Usage
Action/Reason Entry	ADM_ACT_ENTRY	• Develop Enrollment, Evaluate Applicants, Use, Action/Reason Entry, Action/Reason Entry • Develop Enrollment, Process Applications, Use, Action/Reason Entry, Action/Reason Entry	Update multiple applications to an identical program action and status. If you must update a *group* of applications which are for the same academic program and admit term with the same program action, it is faster to do so through this page, as opposed to one at a time on the Application Program Data page.

Updating Program Action and Status of Multiple Applications

Access the Action/Reason Entry page.



Action/Reason Entry page

Admit Term

Select an admit term. Admit terms are defined on the Term Values Table page.

Program Action

Select the program action to be entered on the applications you are updating. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Action Reason	Select an action reason to be entered on the applications if you have defined any reasons for this program action. Values for this field are defined in the Action Reason Table page.
Action Date	The default for the action date is your system date.
Seq (sequence)	If the action you are taking has the same date as the current action, enter a *1.* Enter a *2* for another action on the same date, and so on. The default sequence is *0.*
Application Number and **ID**	Enter the first application number to be processed. The ID displays. If you do not know the application number, prompt on the ID field.
Program Number	Select the program number if the application has multiple program numbers. When you navigate out of this page or click the Refresh button, you can verify that you have the correct person and application by reviewing the information displayed in the Program Data and Program Status group boxes.
Create Program	After entering an application number, click this button to update the program data for the application number that you enter. This button is only available to click if you entered a program action of *MATR.*
Calculate Deposits	Click this link to calculate deposits. The Calculate Deposits page appears. This link appears if you have entered a program action of *ADMT* and you have set up deposits for the application center.

Updating Program Actions and Statuses of Multiple Applications

This section provides an overview of how to update program actions and statuses of multiple applications and discusses how to run the Application Program Update process.

Understanding Multiple Application Program Action and Status Updates

If you have a large number of applications you want to update with the same program action, action reason, and academic program status, you can use a background process.

To update program actions and statuses of multiple applications:

1. Set Up your Mass Change Definition.

   Use the Mass Change Definition − Description page to enter your mass change definition. The mass change definition defines the criteria for selecting which applications should be updated. PeopleSoft provides a sample mass change definition called *Application Program Update Select.* However, your institution might have defined its own mass change definition for updating program information, or, your institution might have changed the shipped sample.

   See *PeopleSoft PeopleTools PeopleBooks*

2. Specify your Mass Change Criteria and Defaults.

Use the Mass Change Definition - Criteria and Defaults page to set up your mass change criteria. You also choose the program action and action reason codes to be added to the selected application records. The system automatically updates the program status according to the action taken.

There is one SQL statement execution sequence for this Mass Change Definition: *Select Applicant Criteria.*

In the Defaults group box, select the codes you want added to the new program row for the selected applications. You may select values for program action, action reason, and academic program status. For example, you might be updating these applications with a program action of *DENY*, an action reason of *AUTO* and an academic program status of *CN - Cancelled.* These three fields are stored on the Application Program Data page.

3. Generate your SQL Statement to Select the Applications to be Updated.

   Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition.

4. Run a Mass Change Group to Select the Applications to be Updated.

   Use the Run Mass Change page to process your mass change and select the actual applications to be updated during the Application Program Update process. After setting up your mass change definition and generating your SQL statement, you are ready to process your mass change. This process selects the actual applications to be updated.

   Because you want to delete any data in the temp file before running this process, you can use a mass change group that PeopleSoft provides, which deletes the temp and runs your *Application Prog Update Select* mass change definition.

   Select *Application Prog Update Base* in the Mass Change Group ID field.

5. Run the Application Program Update process to do the actual updating of applications.

   Use the Application Program Update page to update the program data of the selected applications. A new row of program data is added to the selected applications on the Application Program Data page.

Pages Used to Run the Application Program Update Process

Page Name	Object Name	Navigation	Usage
Application Program Update	RUNCTL_PROGUPDT	Develop Enrollment, Evaluate Applicants, Process, Application Prog Update, Application Prog Update	Update the program data of the selected applications. You must first process your mass change group.

CHAPTER 26

Managing Enrollment

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

- Set up enrollment management.
- Perform enrollment management.
- Use enrollment management target templates.
- Generate enrollment management reports.

Understanding Enrollment Management Targets

This section discusses:

- Enrollment management targets.
- Cohort, population, and division.
- Examples of enrollment management targets.

Learning About Enrollment Management Targets

Enrollment Management is an extremely flexible feature. Although there are many ways in which your institution can use Enrollment Management, you must first think about how you want to set up and use this tool. By spending time now thinking about the design, you will save yourself much valuable time later on.

Because this feature is so flexible, we can only show you examples of how you might want to use it. There are virtually no rules, only possibilities. How you set up and design your enrollment management targets can be as simple or as complex as you want.

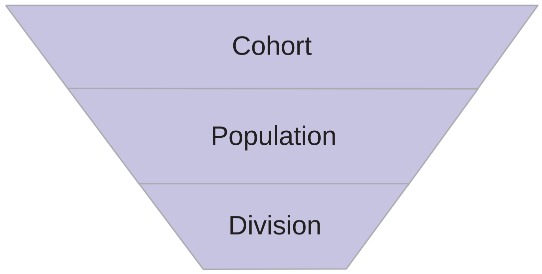
With PeopleSoft Recruiting and Admissions, you can store the following types of enrollment management information:

- Target enrollment numbers.
- Actual enrollment numbers.

You can also group target enrollment numbers and actual enrollment numbers into levels that you define.

Learning About Cohort, Population, and Division

Enrollment management targets are set up using a three-level structure that consists of the following elements: cohort, population, and division. These terms can mean whatever you need them to mean. Cohort, population, and division are different levels, from highest to lowest, that you set up, define, link to one another and for which you set targets. They are conceptually similar to the three-level structure found in communications.



Enrollment Management Level Structure

Cohort is the highest of the three levels. The cohort is the starting point for your target development. An example of a cohort level you could define is the entire group of students in an academic year. You could define a cohort level of 1999 and set an enrollment target of 500 students for that academic year. Alternatively, you could break this up into a cohort level for academic terms of Fall 1999 and Spring 2000.

Population is the next level down the hierarchy. You could define a population level by academic career. Or, you could define a population level by school or college. It is entirely up to you how you define each level.

Division is the final bottom level in the enrollment management target setup. You could define a division level, for example, by gender, ethnicity, academic program, admit type, or program status. There are numerous options for how to break down and define enrollment management levels.

Viewing Examples of Enrollment Management Targets

The following examples illustrate how enrollment management targets can be set up.

Example #1—One Detail

Suppose that the PeopleSoft University College of Engineering is concerned about enrolling more women. You want to conduct a recruiting effort to target women for the 1999 academic year. You might consider setting up the following enrollment management target to track your efforts. The following table shows a *detail* enrollment management target.

Detail Target	
Cohort	1999 Academic Year
Population	College of Engineering
Division	Female
Target	*200*

Example #2—Two or More Details = A Group

Now, let's suppose that you want to break this down from the 1999 Academic Year into targets for each term, Fall and Spring. This is the place to introduce the idea of a *group* enrollment management target. In this case, you set up two detail enrollment management targets and join them as a group to form one group enrollment management target. Instead of one detail with a cohort for the entire academic year of 1999 (Example #1), now you have two detail targets defined; one with a cohort for each term and a target of 100 (Example #2). You can combine two or more details into one group enrollment target.

	Group Enrollment Management Target	
	Detail Target #1	Detail Target #2
Cohort	Fall 1999	Spring 2000
Population	College of Engineering	College of Engineering
Division	Female	Female
Target	100	100

Example 3—More Details!

Let's make the example a little more complicated. The College of Engineering consists of four different academic programs: Mechanical Engineering, Chemical Engineering, Electrical Engineering, and Civil Engineering. Let's say you want each program to set its own targets, not just one overall target for the entire College of Engineering. Assume that you are setting the target for the entire 1999 Academic Year, and not by term this time. You could set up a group of four detail enrollment management targets, one for each program as follows:

	Group Enrollment Management Target			
	Detail #1	Detail #2	Detail #3	Detail #4
Cohort	1999	1999	1999	1999
Population	Mech. Eng.	Chem. Eng.	Elect. Eng.	Civil Eng.
Division	Female	Female	Female	Female
Target	100	100	100	100

Example 4—Even More Details!

Now, let's add another layer of complexity. Suppose that the College of Engineering is concerned not only with enrolling more women, but other underrepresented minorities as well: African Americans, Native Americans, and Latinos. You want to set up enrollment management targets for all women and underrepresented minorities for the 1999 Academic Year for each of the four academic programs within the College of Engineering. That's 16 different enrollment management target details. Here's one way how you could set this up:

	Detail 1	**Detail 2**	**Detail 3**	**Detail 4**
Cohort	1999	1999	1999	1999
Population	Mech. Eng.	Mech. Eng.	Mech. Eng.	Mech. Eng.
Division	Female	African American	Latino	Native American
Target	100	100	100	100
	Detail 5	Detail 6	Detail 7	Detail 8
Cohort	1999	1999	1999	1999
Population	Chem. Eng.	Chem. Eng.	Chem. Eng.	Chem. Eng.
Division	Female	African American	Latino	Native American
Target	50	50	50	50
	Detail 9	Detail 10	Detail 11	Detail 12
Cohort	1999	1999	1999	1999
Population	Elect. Eng.	Elect. Eng.	Elect. Eng.	Elect. Eng.
Division	Female	African American	Latino	Native American
Target	25	25	25	25
	Detail 13	Detail 14	Detail 15	Detail 16
Cohort	1999	1999	1999	1999

	Detail 1	Detail 2	Detail 3	Detail 4
Population	Civil Eng.	Civil Eng.	Civil Eng.	Civil Eng.
Division	Female	African American	Latino	Native American
Target	20	20	20	20

In the preceding example, a group enrollment target that you define could consist of *all* 16 of the detail targets, but it does not have to. You could set up a group of the horizontal detail targets in the above table, or a group of the vertical detail targets, and so on. It all depends on what you want to do with the information, and how you want to get at it and report on it. There are several possible ways to use the enrollment management targets as tools in your recruiting efforts.

Setting Up Enrollment Management Targets

This section explains how to define for enrollment management the following items:

- Divisions
- Populations
- Cohorts

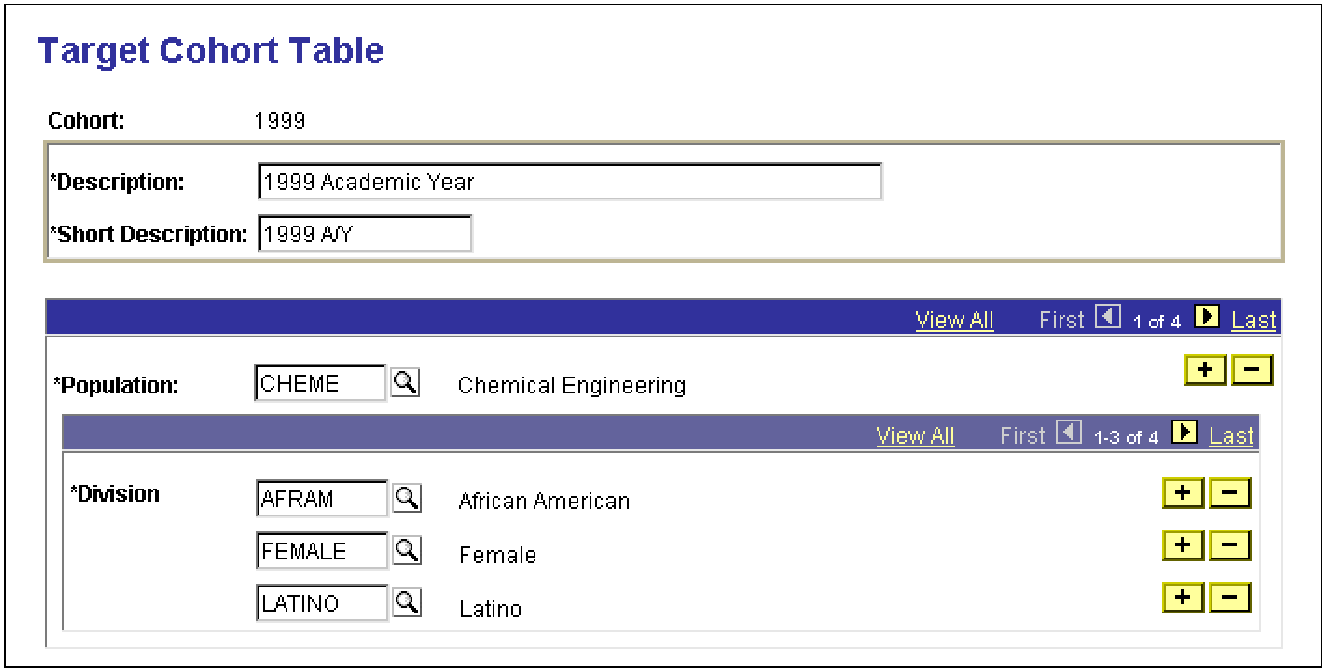
  Start by defining divisions and then define populations and cohorts, because you attach divisions and populations to cohorts.

Pages Used to Define Divisions, Populations, and Cohorts

Page Name	Object Name	Navigation	Usage
Target Division Table	TARGET_DIV_TABLE	Develop Enrollment, Manage Enrollment, Setup, Enrollment Target Division, Target Division Table	Define a division.
Target Population Table	TARGET_POP_TABLE	Develop Enrollment, Manage Enrollment, Setup, Enrollment Target Population, Target Population Table	Define a population enrollment management target.
Target Cohort Table	TARGET_COH_TABLE	Develop Enrollment, Manage Enrollment, Setup, Enrollment Target Cohort, Target Cohort Table	Define a cohort enrollment management target.

Defining a Cohort

Access the Target Cohort Table page.



Target Cohort Table page

After you set up your divisions and populations, you set up the cohort. As an example, set up an enrollment target level that tracks the enrollment of women, in the PeopleSoft University College of Engineering's Chemical Engineering program, for the 1999 academic year.

Population Select the populations that you want to attach to this cohort. In this example, you attached the population of Chemical Engineering to the 1999 Academic Year cohort. You can attach multiple populations to a cohort. Define populations on the Target Population Table page.

Division Select the divisions that you want to attach to this cohort. In our example, you attached the African American, Female and Latino divisions to the 1999 Academic Year cohort. You can attach multiple divisions to a cohort. Define divisions on the Target Division Table page.

Performing Enrollment Management

This section discusses how to:

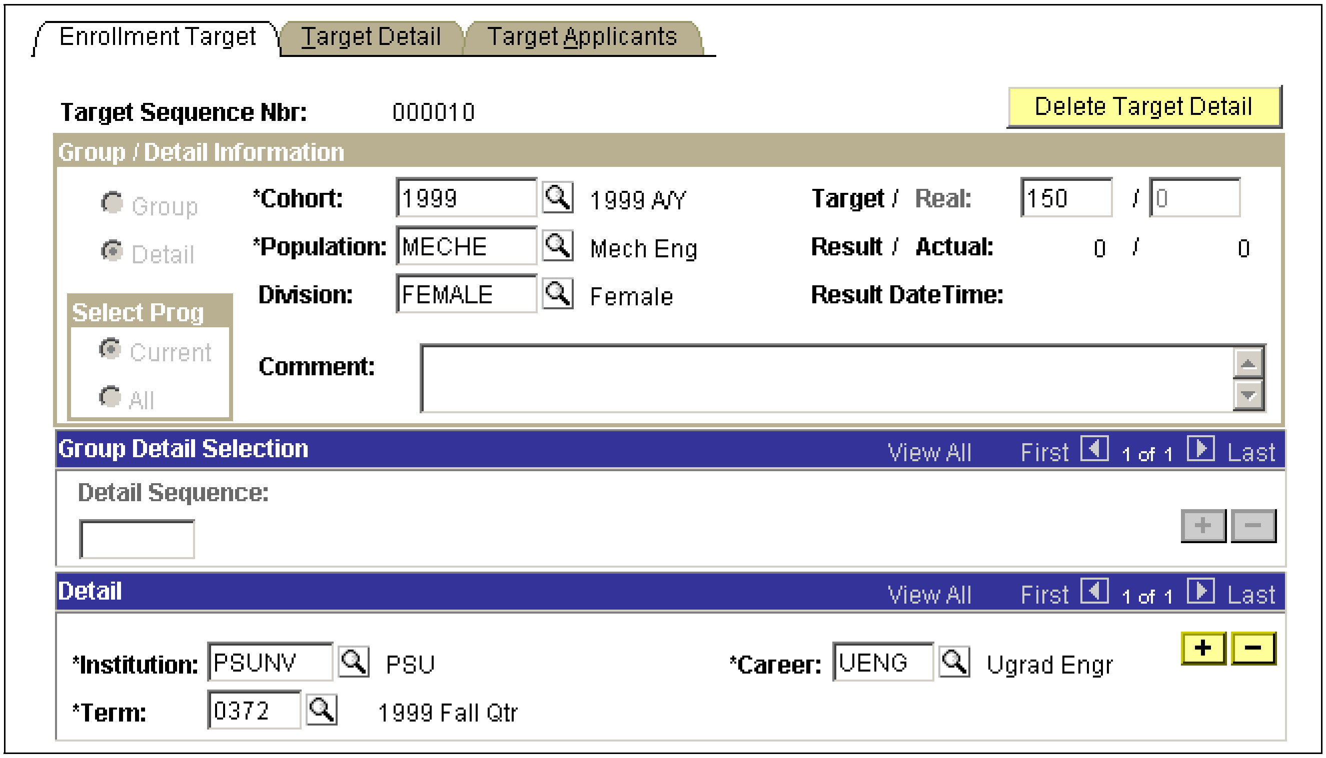
- Define enrollment management targets.
- Set additional target detail.
- Process enrollment management targets.
- Display enrollment management target results with the Enrollment Target page.
- Display enrollment management target results with the Enrollment management Summary page.

Pages Used to Perform Enrollment Management

Page Name	Object Name	Navigation	Usage
Enrollment Target	ENRL_MGMT_TARGET	Develop Enrollment, Manage Enrollment, Use, Enrollment Target, Enrollment Target	Set enrollment targets for each level that you defined.
Target Detail	ENRL_MGMT_DETAIL	Develop Enrollment, Manage Enrollment, Use, Enrollment Target, Target Detail	Specify additional details about a target.
Target Applicants	ENROLL_MGMT_ID	Develop Enrollment, Manage Enrollment, Use, Enrollment Target, Target Applicants	Display a list of all the people that meet the target selection criteria. The Enrollment Target process populates the values in this page. A list of people who meet your target selection criteria appears on the bottom section of the page. For each person, it displays the ID, name, application number, program number, and the number of times that person is counted for this detail or group. If you are displaying a detail target, then this field is always *1*. If you are displaying a group target, then this number could be anything depending on the number of times the person met the criteria for each detail target within the group.
Enrollment Target	RUNCTL_ENRL_TARGET	Develop Enrollment, Manage Enrollment, Process, Enrollment Target, Enrollment Target	Process the enrollment management target and obtain current results. Once you have set up and defined your enrollment management target levels, you can run the Enrollment Target process at any time to obtain the results and see how your institution is doing with its efforts towards these targets.
Enrollment Target Summary	ENROLL_TARGET_SUMM	Develop Enrollment, Manage Enrollment, Inquire, Enrollment Target Summary, Enrollment Target Summary	View enrollment management target results.

Defining Enrollment Management Targets

Access the Enrollment Target page. You must have already defined cohorts, populations, and divisions.



Enrollment Target page

Group/Detail Information

Group
Select this option if you are setting up a group enrollment management target consisting of multiple detail targets.

Detail
Select this option if you are setting up a detail enrollment management target. This is the default setting.

Cohort
Select the cohort for this enrollment management target.

Population
Select the population for this enrollment management target.

Division
Select the division for this enrollment management target.

Target
Enter the target number for this enrollment management target.

Result
After you run the Enrollment Target process, this field displays the total number of application rows meeting the target selection criteria.

Actual
After you run the Enrollment Target process, this field displays the total number of people meeting the target selection criteria. If it is a detail row, the Actual field contains the same number as the Result field.

Real
After you run the Enrollment Target process, this field displays the same value as the Result field. For group targets, you can change this field to any number between (and including) the result and actual number.

For example, suppose that for a group target of Fall 1998 undergraduate enrollment, the Result field displays *100*. However, suppose that some of these people applied for two or more programs. Therefore, the Actual field displays *80*. The Real field defaults to *80* but you can change it to any number within that range that is appropriate, for example, *90*. You can use the Target Applicants page to view a list of the people who meet your target selection criteria and verify the correct *real* number. You can also use the Enrollment Management Summary page to view results.

Result Date/Time After you run the Enrollment Target process, the date and time the most recent results were calculated for this enrollment target appear.

Select Prog

Choose an application program setting:

Current Select this option to have the Enrollment Target process check only the most current application row. If a student is in this application program, and matches the target selection criteria, he or she is included in the count.

All Select this option to have the Enrollment Target process check all the application rows. If a student has any application program row that matches the target selection criteria, he or she is included in the count.

For example, suppose that a person has applied to the LAU academic program as illustrated in the following table:

Program	Effective Date	Status
LAU	06/01/99	Admitted
LAU	01/01/99	Applied

You create an enrollment target detail in which the program = *LAU* and the status = *Applied,* then:

If you select the All option, the student is included in the enrollment target count on 6/01/99.

If you select the Current option, the student is *not* included in the enrollment target count on 6/01/99. The student's most current application program status (highest effective date) is *Admitted.*

Group − Detail Selection

Detail Sequence Use this field only if you are creating a group enrollment management target that consists of a series of detail targets. You would select all the detail targets here.

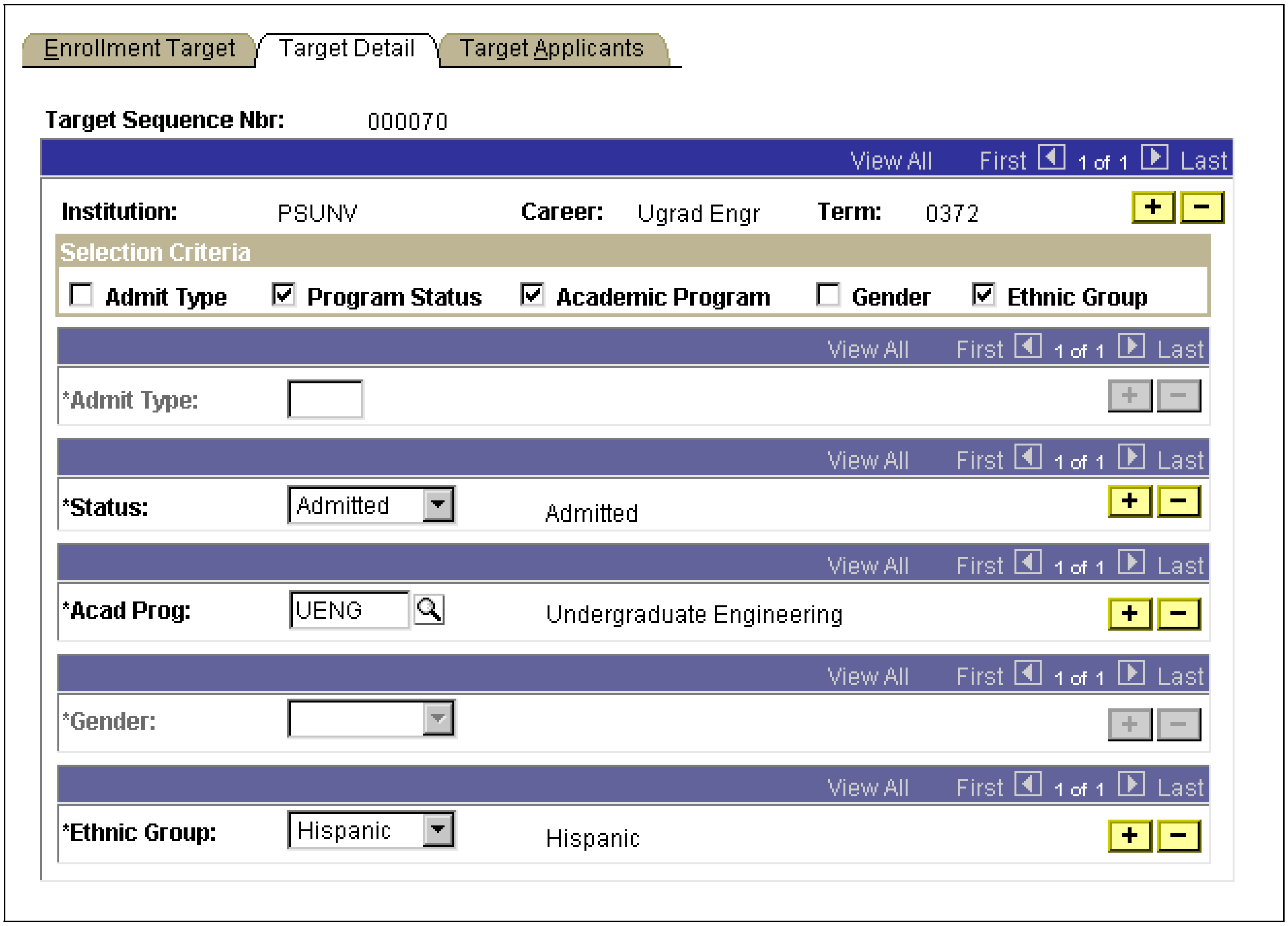
Detail

Career Select the academic career for this enrollment management target.

Term Select the term for this enrollment management target.

Setting Additional Target Details

Access the Target Detail page.



Target Detail page

In the Selection Criteria group box, select any additional criteria that you want to use to define your target. These are selection criteria beyond the academic institution, academic career, and academic term that you defined on the Enrollment Target page. The specific cohort, population, and division should drive the selection of any of these fields.

Admit Type Select this check box if you want to define your target by admit type. Once you select this check box, the Admit Type field becomes available for input.

Program Status Select this check box if you want to define your target by program status. Once you select this check box, the Status field becomes available for input.

Academic Program Select this check box if you want to define your target by academic program. Once you select this check box, the Acad Prog (academic program) field becomes available for input.

Gender Select this check box if you want to define your target by gender. Once you select this check box, the Gender field becomes available for input.

Ethnic Group Select this check box if you want to define your target by ethnic group. Once you select this check box, the Ethnic Group field becomes available for input.

If this detail comprised your entire enrollment management target, then you are done. Remember to save the page. If you are creating a group enrollment management target and this was just one detail target, display the Enrollment Target page again and specify your additional detail targets. Use the Group - Detail Selection field to pull in all the detail targets you must specify (roll up into) the group enrollment management target.

Note. The Target Applicants page displays only the list of students meeting the selection criteria *after* you have run the Enrollment Target process.

Processing Enrollment Management Targets

Access the Enrollment Target page. You must first set up the target detail on the Enrollment Target and Target Detail pages.

Cohort Select the cohorts for which you want to process enrollment management targets.

Click Run to run the Enrollment Target process at user-defined intervals.

Displaying Enrollment Management Target Results

Once you have run the Enrollment Target process, you can display the results to see how your institution is currently doing with its recruiting efforts towards the target. There are two ways that you can obtain enrollment management target information:

- Through the Enrollment Target page.

  Once you have run the enrollment management target process for a specific enrollment management target, you can use the Enrollment Target page to display the calculated enrollment figures.

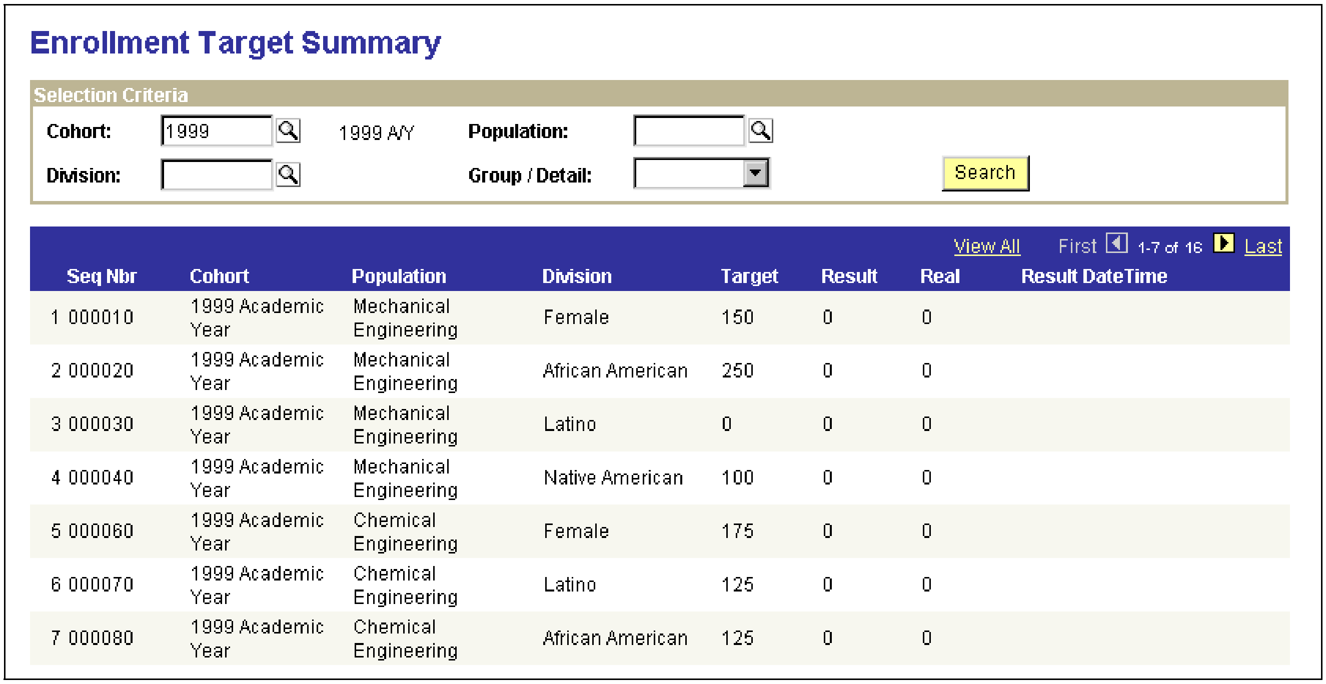
- Through the Enrollment Management Summary page.

See Also

Chapter 26, “Managing Enrollment,” Setting Up Enrollment Management Targets, page 437

Displaying Target Results with the Enrollment Management Summary Page

Access the Enrollment Target Summary page. You must first run the Enrollment Target process.



Enrollment Target Summary

Selection Criteria

Cohort: 1999 1999 A/Y Population:

Division: Group / Detail: Search

View All First 1-7 of 16 Last

Seq Nbr	Cohort	Population	Division	Target	Result	Real	Result DateTime
1 000010	1999 Academic Year	Mechanical Engineering	Female	150	0	0	
2 000020	1999 Academic Year	Mechanical Engineering	African American	250	0	0	
3 000030	1999 Academic Year	Mechanical Engineering	Latino	0	0	0	
4 000040	1999 Academic Year	Mechanical Engineering	Native American	100	0	0	
5 000060	1999 Academic Year	Chemical Engineering	Female	175	0	0	
6 000070	1999 Academic Year	Chemical Engineering	Latino	125	0	0	
7 000080	1999 Academic Year	Chemical Engineering	African American	125	0	0	

Enrollment Target Summary page

Entering Selection Criteria

Cohort, Population, and **Division** — Select the cohort, population, and division for which you want to display targets.

Search — Click to display the specified target results.

Viewing Results

The bottom section of the page displays the target results in the following columns:

Seq Nbr (sequence number) — The target sequence number.

Cohort — The defined cohort.

Population — The defined population.

Division — The defined division.

Target — The target number you originally set for this enrollment management target.

Result — The current result count for this target.

Real — The current real count for this target.

Result Calculated Date/Time — The most recent date and time these results were last calculated.

Using Enrollment Management Target Templates

Use the Enrollment Management Template feature to easily create new targets by copying the details that you want from existing targets. Using templates makes the process of creating enrollment management targets much simpler. For example, you might have to set up a target detail enrollment for the next term that is identical in all other respects as a target detail for this term. Or, you might want to have exactly the same detail and group targets as last academic year but you must have a different target number. The target template feature can easily handle this, saving you the trouble of having to set up the target details from scratch.

Use the Target Detail Template component to define and use enrollment management templates.

To create enrollment targets using a template:

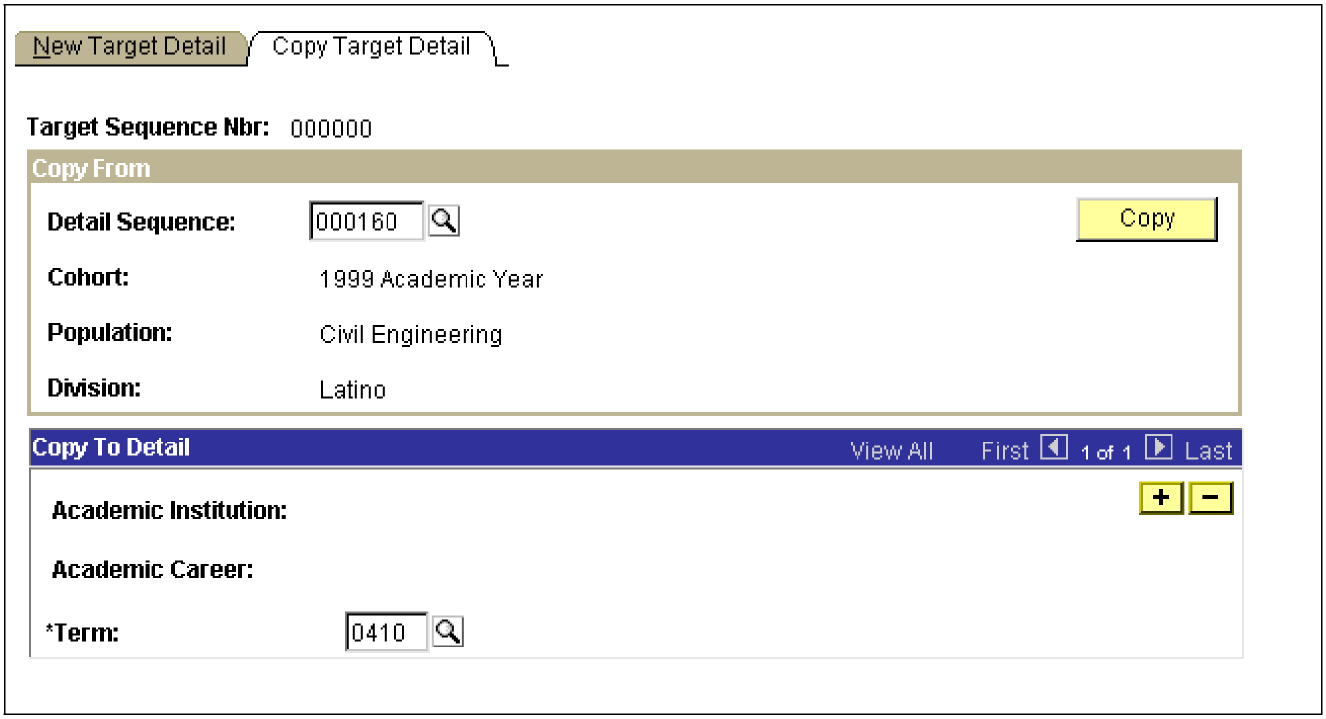
1. Enter new target details.
2. Specify the detail from which you are copying.

Pages Used to Use Enrollment Management Target Templates

Page Name	Object Name	Navigation	Usage
New Target Detail	TARGET_DETAIL_NEW	Develop Enrollment, Manage Enrollment, Use, Target Detail Template, New Target Detail	Create new enrollment management targets using the target template feature.
Copy Target Detail	TARGET_DETAIL_COPY	Develop Enrollment, Manage Enrollment, Use, Target Detail Template, Copy Target Detail	Specify the target information you are copying from for the new detail target.

Selecting the Target Information from the Old Detail

Access the Copy Target Detail page.



Copy Target Detail page

Detail Sequence — Select the detail sequence number of the detail from which you are copying. The system displays the corresponding cohort, population, and division, if applicable.

Term — Select the term for the new detail you are creating.

Copy — Click to copy the detail template from the old to the new target.

Once you save the page, you can display the new detail template and change only the items you have to for the new target, rather than recreating everything from scratch.

Generating Enrollment Management Reports

This section discusses how to generate three different enrollment management reports:

- Target Cohort Table.
- Target Population Table.
- Target Division Table.

Pages Used to Generate Enrollment Management Reports

Page Name	Object Name	Navigation	Usage
Enrollment Target Cohort	PRCSRUNCTL	Develop Enrollment, Manage Enrollment, Report, Enrollment Target Cohort	Create a report listing the enrollment target cohort levels you have defined.
Enrollment Target Population	PRCSRUNCTL	Develop Enrollment, Manage Enrollment, Report, Enrollment Target Population	Create a report listing the enrollment target population levels you have defined.
Enrollment Management Division	PRCSRUNCTL	Develop Enrollment, Manage Enrollment, Report, Enrollment Target Division	Create a report listing the enrollment target division levels you have defined.

CHAPTER 27

Loading and Assigning EPS Market Codes

This chapter provides an overview of EPS market codes and discusses how to:

- Set up external organization code types on the Ext Org Code Type Table (external organization code type table) page.
- Load the EPS market codes via the EPS External Load Parms (EPS external load parameters) page. If desired, you can then view the load results and correct any errors.
- View EPS load results.
- Assign EPS market codes to organizations on the EPS Assign Organization Parms (EPS assign organization parameters) page.
- Print EPS market codes (if desired) using the EPS Market Codes Table - Run Control page, and purge the EPS suspense files.

Understanding EPS Market Codes

EPS™ (Enrollment Planning Service) is a geographic and demographic data service offered annually by the College Board to Colleges and Universities. EPS provides information to subscribing institutions about competitors, feeder schools, and demographic strengths and weaknesses. EPS market codes are proprietary market codes owned by the College Board and are used to categorize external organizations and people into geographical areas, mostly in the United States. Some admissions offices use EPS market codes to focus their recruiting efforts in geographic areas in which they believe they will be the most successful. Note that there is a license agreement that you must sign with the College Board to use the EPS geomarket data. However, an institution is not required to purchase EPS to use the PeopleSoft EPS market code functionality.

PeopleSoft Student Administration Solutions does not provide EPS data; however, it does provide an EPS market code load process and lets you automatically assign the market codes to external organizations.

Setting Up Code Types for EPS Organizations

This section discusses how to set up code types for EPS organizations.

Page Used to Set Up Code Types for EPS Organizations

Page Name	Object Name	Navigation	Usage
Ext Org Code Type Table (external organization code type table)	EXTORGCDTYPE_TABLE	Build Community, Organization Data, Setup, Ext Org Code Type Table, Ext Org Code Type Table	Define an EPS market code organization code type. When you load EPS data, the EPS External Load process links the EPS data to the external organization code types that you define. Thus, you identify EPS data by the external organization code type to which you link the data.

Setting Up External Organization Code Types

Access the Ext Org Code Type Table (external organization code type table) page.

Code Type Option Select *EPS* if the external organization code type that you are adding is an EPS market code type. If the code you are adding is *not* an EPS market code, select *None.*

Loading EPS Market Codes

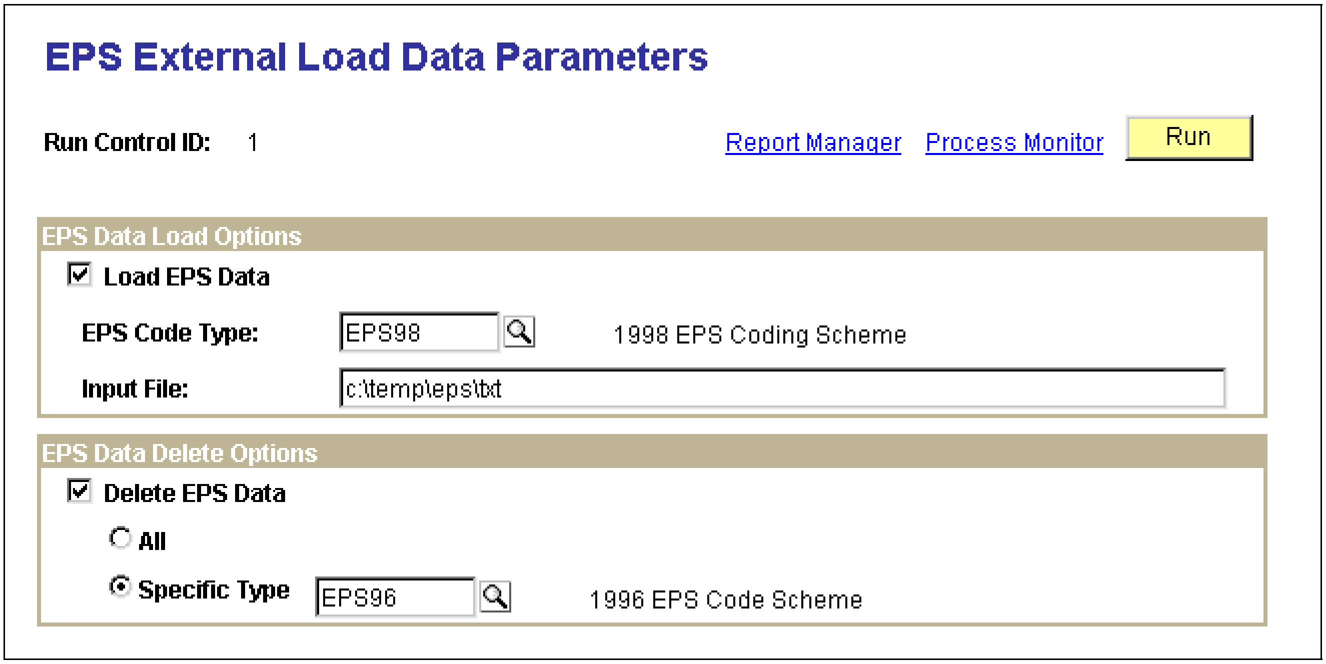
This section discusses how to load EPS market codes.

Page Used to Load the EPS Market Codes

Page Name	Object Name	Navigation	Usage
EPS External Load Data Parameters	EPS_LOAD_PARMS	Build Community, Organization Data, Process, EPS Load External Data, EPS External Load Data Parameters	Run the process to load the EPS market codes for the organization type that you defined.

Running the EPS External Load Process

Access the EPS External Load Data Parameters page.



EPS External Load Data Parameters page

EPS Data Load Options

Load EPS Data Select to *add* EPS data to your system. You must select either the Load EPS Data check box or the Delete EPS Data check box.

EPS Code Type Select the EPS code type that you want to load. Only EPS code types that you defined on the Ext Org Code Type Table page are available for selection.

Input File Enter the drive, directory, and filename path where the EPS market code external data resides.

EPS Data Delete Options

Delete EPS Data Select if you want to *delete* EPS data. You might perform this action, for example, if you wanted to remove the previous year's version of the EPS data.

All Select to remove all EPS data.

Specific Type Select to delete a specific EPS data type. Then choose an EPS type from the field to the right.

In the previous page shot, you are loading the EPS market codes for 1998 (EPS98) while at the same time deleting the codes for 1996 (EPS96).

Click the Run button to run the EPS External Load process at user-defined intervals.

Viewing EPS Load Results

This section discusses how to view the following data related to the EPS load process:

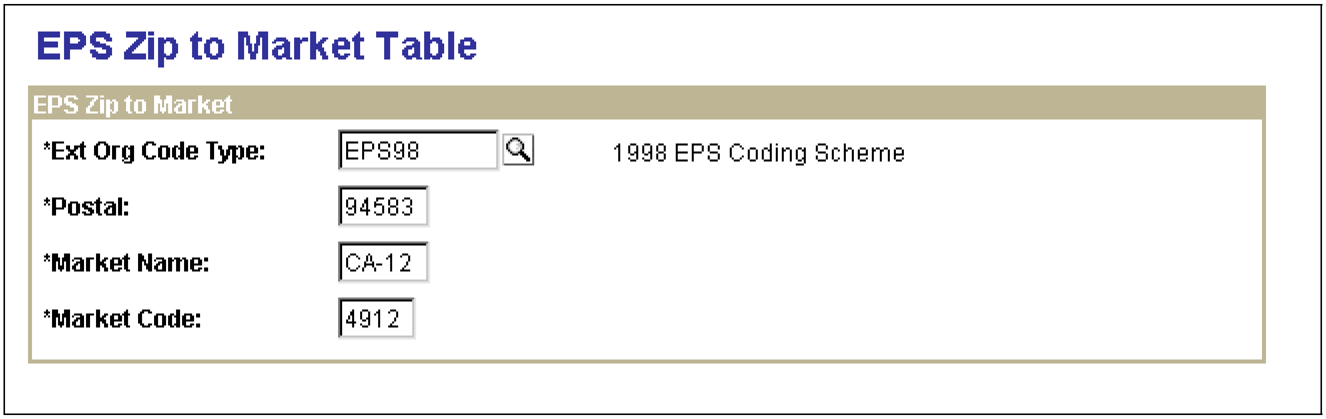
- Zip codes
- Market codes
- Error messages
- Suspense messages
- All messages

Pages Used to View EPS Load Results

Page Name	Object Name	Navigation	Usage
EPS Zip to Market Table	EPS_ZIP_MRKT_TABLE	Build Community, Organization Data, Setup, EPS Zip to Market Code, EPS Zip to Market Table	View the zip code that is related to the market code. After running the EPS Load External Data process, the EPS data is populated into the EPS Zip to Market Code table.
EPS Market Code Table	EPS_MRKT_CD_TABLE	Build Community, Organization Data, Setup, EPS Market Code Table, EPS Market Code Table	View EPS market codes that you loaded through the load process.
EPS Suspense Data	EPS_SUSP_DATA	Build Community, Organization Data, Use, EPS Suspense, EPS Suspense Data	View any error messages that may result from the EPS load process.
EPS Suspense Message	EPS_SUSP_MESSAGE	Build Community, Organization Data, Use, EPS Suspense, EPS Suspense Message	View the EPS suspense error messages.
All EPS Messages	EPS_MESSAGE_TABLE	Build Community, Organization Data, Inquire, EPS Messages, All EPS Messages	View all of the messages generated by the EPS External Load process.

Viewing EPS Zip Codes Loaded through the Load Process

Access the EPS Zip to Market Table page.



EPS Zip to Market Table page

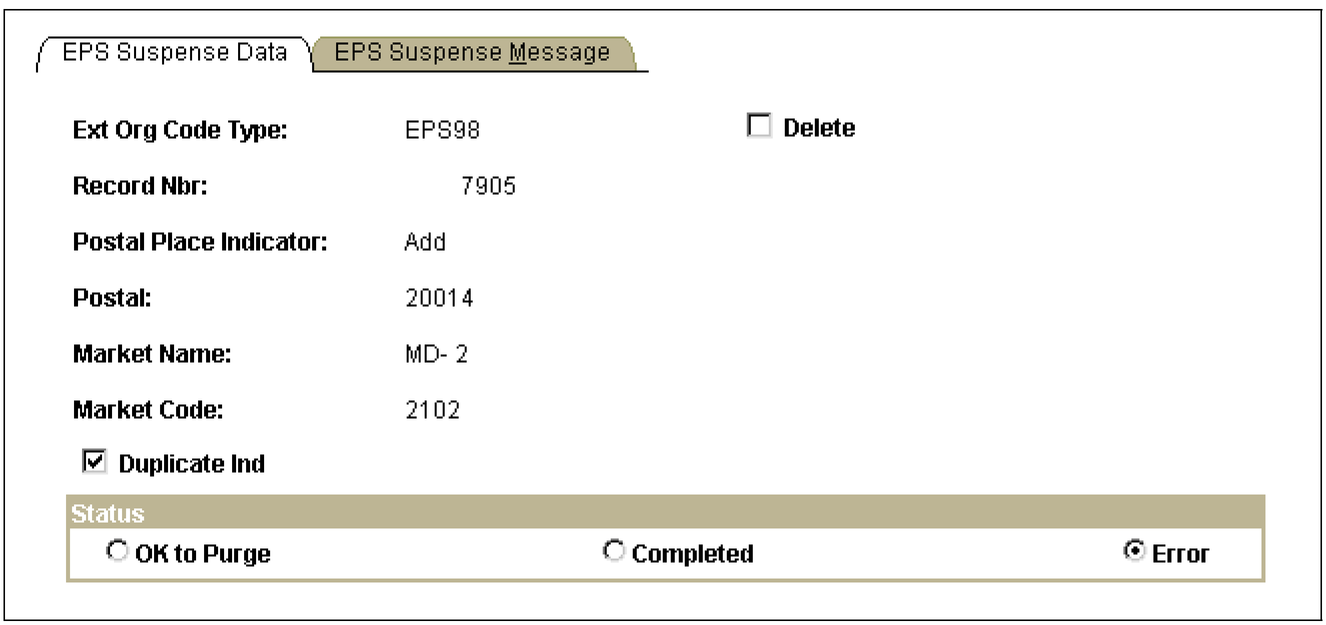
Market codes can be linked to many external organization code types. You can view market code descriptions on the EPS Market Code Table page.

Viewing EPS Market Codes Loaded through the Load Process

Access the EPS Market Code Table page.

Viewing EPS Load Process Error Messages

Access the EPS Suspense Data page.



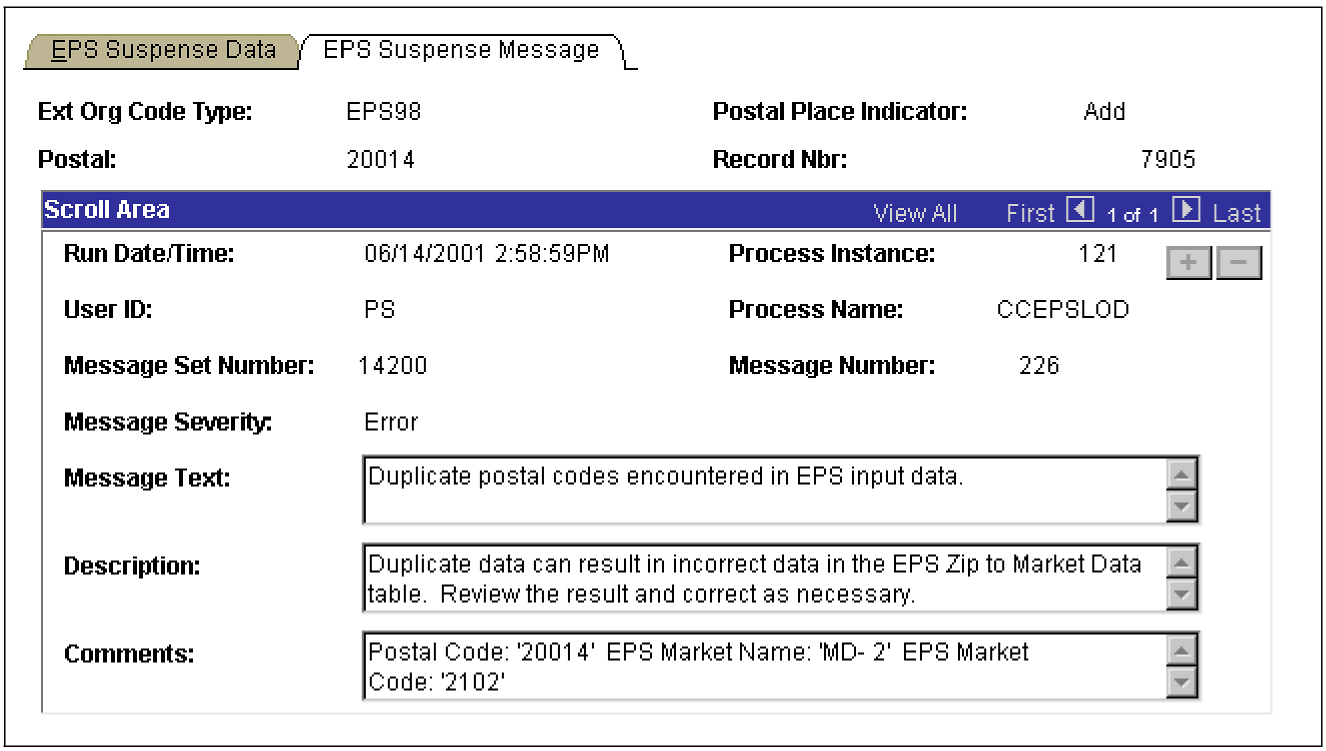
EPS Suspense Data page

Delete	Select to mark this suspense record for deletion. The system deletes the record when you run the EPS Purge Program process.
Duplicate Ind (duplicate indicator)	The load process selects this check box when it finds a duplicate postal code, market name, and market code within the code type.

OK to Purge	Select to mark the record for purge. When you run the EPS Purge Program process the process purges this record.
Completed	The load process selects this option when the record has been successfully updated.
Error	The load process selects this option when it encounters an error, such as a duplicate. The system indicates duplicates by selecting the Duplicate Ind check box. If you encounter a duplicate record, you can decide whether to delete the record by selecting the Delete check box, or whether to ignore the duplication by clearing the Duplicate Ind check box.

Viewing EPS Suspense Messages

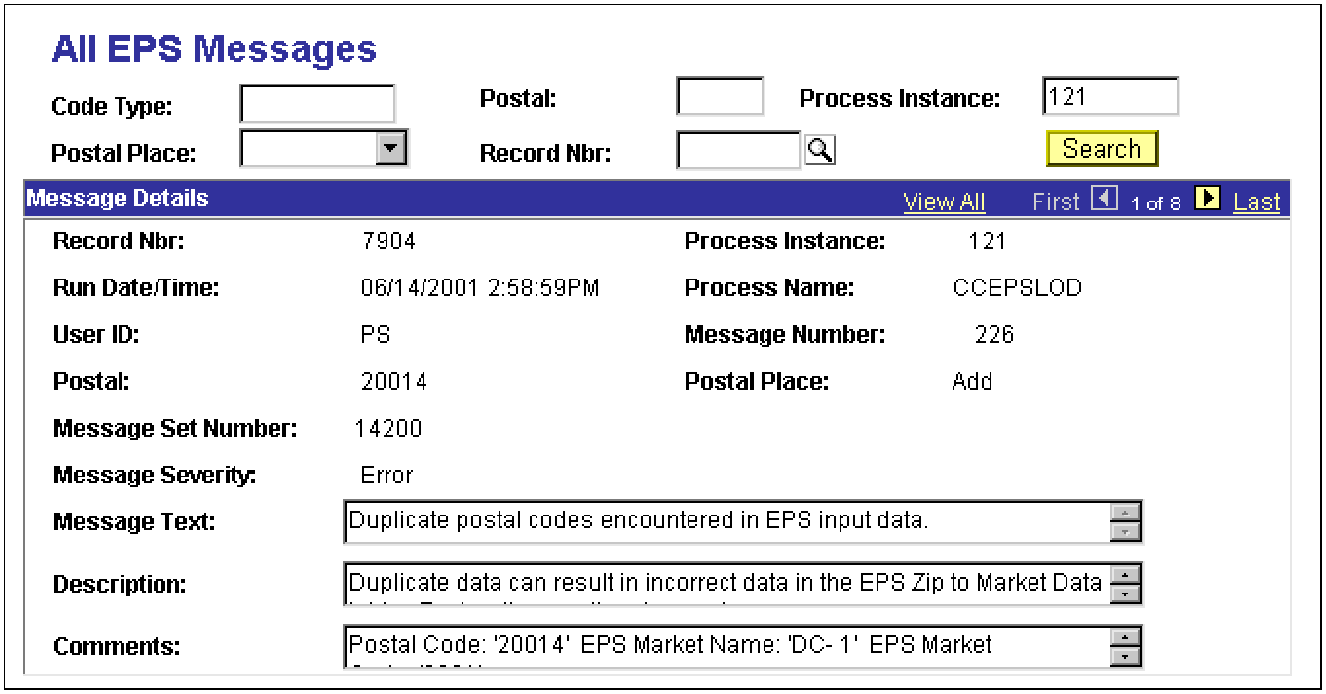
Access the EPS Suspense Message page.



EPS Suspense Message page

Viewing All Messages Generated from Loading EPS Market Codes

Access the All EPS Messages page.



All EPS Messages page

Code Type, Postal, Process Instance, Postal Place, and **Record Number**
You use these fields to narrow the selection of messages that you want to display.

Search
Click to display the messages based on your search.

Assigning EPS Market Codes to an Organization

This section tells you how to:

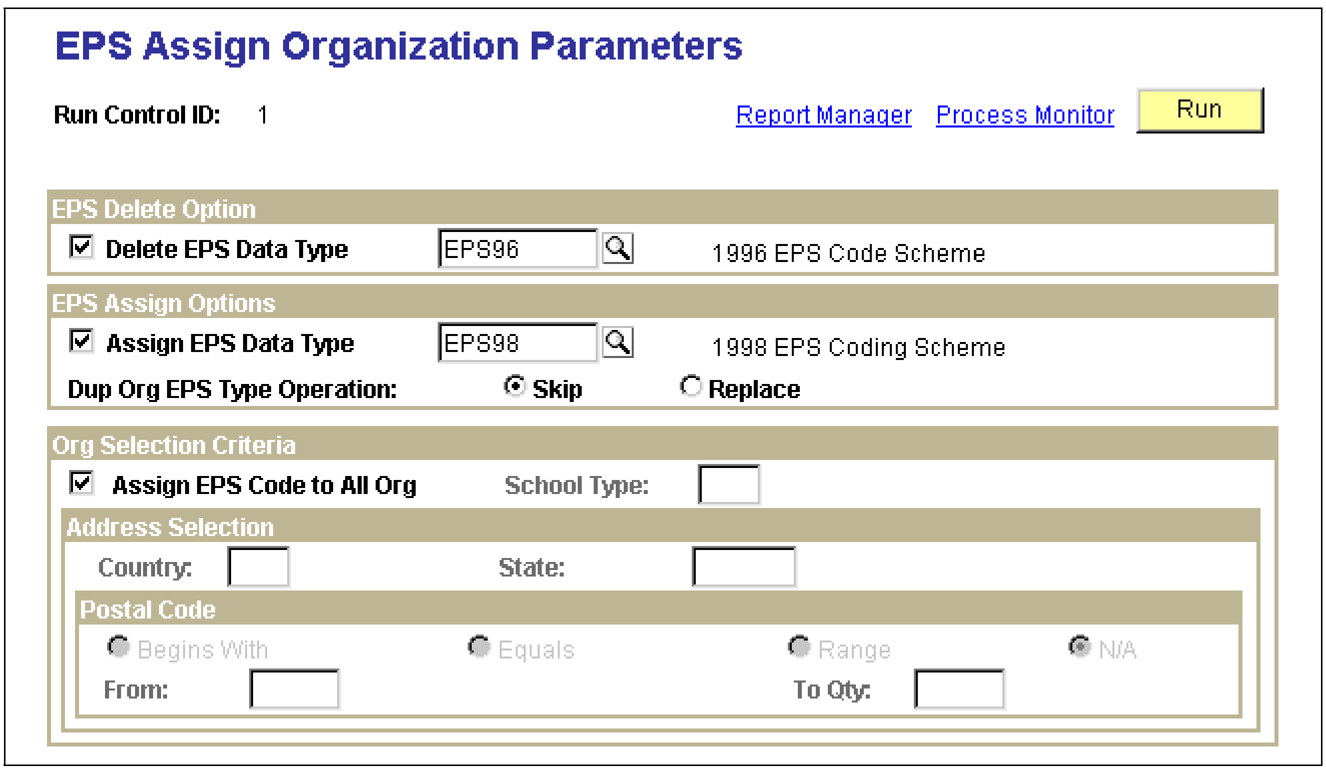
- Assign market codes.
- View and maintain the organization external codes.

Pages Used to Assign EPS Market Codes to an Organization

Page Name	Object Name	Navigation	Usage
EPS Assign Organization Parameters	EPS_ASGN_ORG_PARMS	Build Community, Organization Data, Process, EPS Assign Organization, EPS Assign Organization Parms	Assign EPS market codes to external organizations.
External Organization Codes	EXT_ORG_CODES	Build Community, Organization Data, Use, Organization External Codes, External Organization Codes	Display the results of the automated EPS assignment process for a specific external organization. You can also use this page to maintain the EPS market code data for the institution.

Assigning Market Codes

Access the EPS Assign Organization Parameters page.



EPS Assign Organization Parameters page

EPS Delete Option

Delete EPS Data Type Select to delete EPS Data. Use the field to the right of this check box to select the EPS code type that you want to delete. You might want to perform this action, for example, to remove a prior year's version of the EPS data.

EPS Assign Options

Assign EPS Data Type	Select to assign EPS data to organizations. Use the field to the right of this check box to select the EPS code type that you want to assign. In the preceding page example, the EPS Assign Organization process will delete the 1996 EPS Coding Scheme market code (*EPS96*) and it will assign the 1998 EPS Coding Scheme market code (*EPS98).*
Skip	Select if you *do not* want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.
Replace	Select if you *do* want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.

Org Selection Criteria

Assign EPS Code to All Org (assign enrollment planning service code to all organizations)	Select to assign EPS market codes to all external organizations. If you select this check box, the School Type field and the fields in the Address Selection group box become unavailable for input.
School Type	Select the school type to which you want to assign EPS market codes. If you want to select organizations by using the address fields below, do not select the Assign EPS Code to All Org check box. Instead, select a school type (such as *Secondary*).

Address Selection

Use this group box to assign EPS market codes to organizations based on address criteria.

Country and **State**	Select the country and state to select external organizations.

Postal Code

Use this group box if you want to select external organizations from a certain postal code or postal code range. Select the appropriate option depending on how you want to select by postal code. Select one option only.

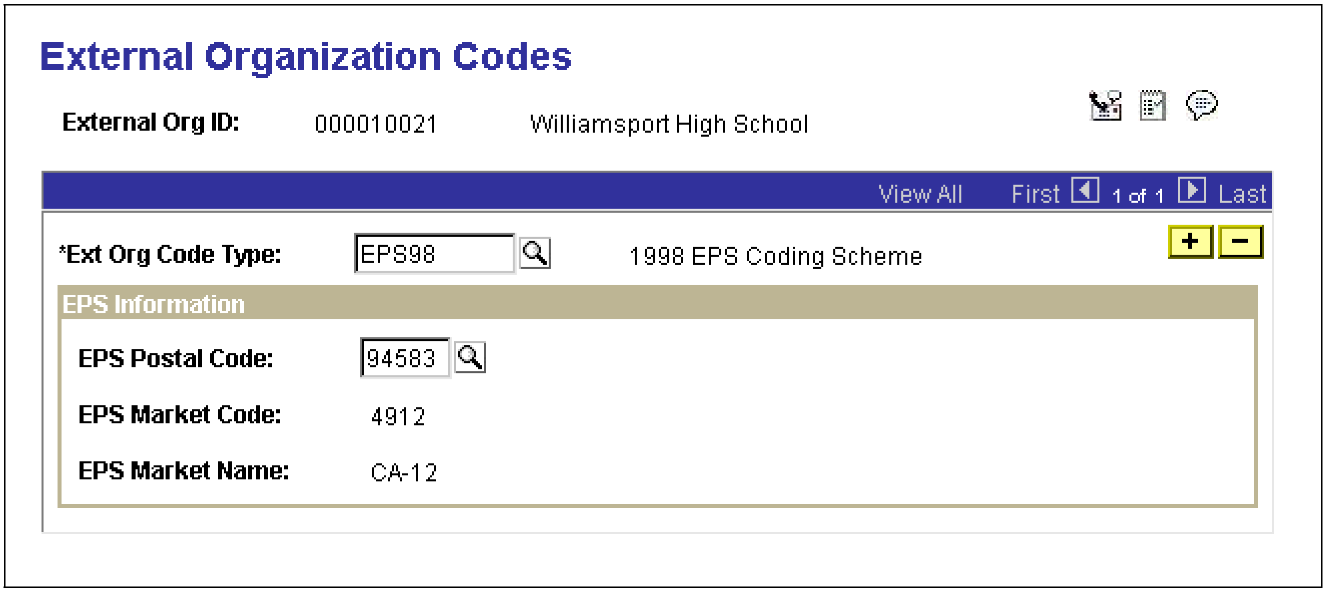
Begins With	Select this option to choose an organization by a beginning postal code. Enter the beginning postal code in the From field. For example, suppose that one organization has had a 5-digit postal code entered (90068) and one organization has a 9-digit version of the postal code entered (90068-6328). Using a postal code that begins with 90068 will find both organizations.
Equals	Select this option to choose an organization by a specific postal code. Enter the postal code in the From field.
Range	Select this option to choose an organization by a postal code range. Enter the beginning postal code in the From field and the ending postal code in the To field.

N/A Select this option if you do not want to use postal codes in your selection criteria for the organization. This is the default setting.

Click the Run button to run the EPS Assign Organization process at user-defined intervals.

Viewing and Maintaining the Organization External Codes

Access the External Organization Codes page.



External Organization Codes page

EPS Org Code Type (enrollment planning services code type) Select the external organization code type. If this external organization code type is an EPS code type, then the EPS Postal Code field becomes available for selection (if the external organization code type is not an EPS code type, then the EPS Postal Code field displays but you cannot edit or change this field).

EPS Postal Code Select the EPS postal code. You can change this field no matter what the assignment process did.

EPS Market Code and **Name** Once you select an EPS postal code, the system populates the EPS Market Code and EPS Market Name fields from information from setup tables. This data cannot be changed on this page.

Printing and Purging EPS Market Codes

This section discusses how to:

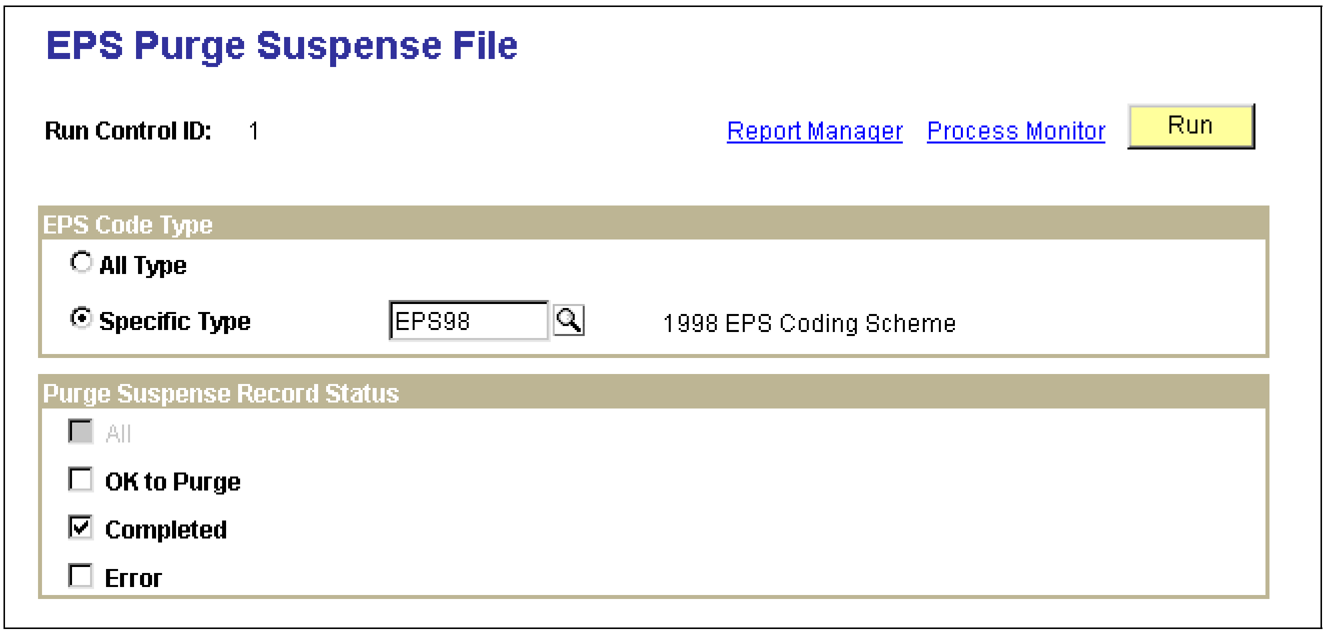
- Print EPS market codes.
- Purge EPS market codes.

Pages Used to Print and Purge EPS Market Codes

Page Name	Object Name	Navigation	Usage
EPS Market Code Table – Run Control	PRCSRUNCTL	Build Community, Organization Data, Report, EPS Market Code Table	Generate a report of the EPS market codes from the EPS Market Code table.
EPS Purge Suspense File	EPS_PURGE_PARMS	Build Community, Organization Data, Process, EPS Purge Suspense File, EPS Purge Suspense File	Purge EPS code records from the suspense file. You can purge all EPS codes or a specific type.

Purging EPS Suspense Files

Access the EPS Purge Suspense File page.



EPS Purge Suspense File page

EPS Code Type

Use this group box to select the EPS market code records that you want to purge from the suspense file.

All Type Select to purge all EPS market code type records from the suspense file.

Specific Type Select to purge only a specific EPS market code type record from the suspense file. Choose an EPS Market Type from the field to the right.

Purge Suspense Record Status

Use this group box to select the type of messages that you want to remove. You must choose at least one.

All Select to remove all suspense records, regardless of their status.

OK to Purge Select to remove all suspense records with a status of *OK to Purge.*

Completed Select to remove all suspense records with a status of *Completed.*

Error	Select to remove all suspense records with a status of *Error*.

Click the Run button to run the EPS Purge Program process at user-defined intervals.

CHAPTER 28

Deleting Prospect and Applicant Information

This chapter provides an overview of deleting prospect and applicant information and discusses how to:

- Delete a prospect record.
- Delete an application.

Understanding the Prospect and Application Delete Feature

This section lists common elements and provides an overview of the Prospect and Application Delete feature.

Use the Prospect and Application Delete feature if you added a prospect or an applicant to the system in error and you want to quickly delete the prospect's record, application, and associated 3C information. This feature consists of two Structured Query Report (SQR) processes: the Prospect Delete process (ADPRSDEL) and the Application Delete process (ADAPPDEL).

You can use these processes to delete*all* academic career information for a prospect or applicant or to delete information for a *specific* academic career, when the prospect or applicant has multiple careers entered into the system. In either case, the processes delete prospect or applicant data from every table in the database in which the data resides. You cannot delete 3C information without also deleting the academic career for the person.

Important! The prospect and application delete processes are designed strictly as clean-up tools. They are *not* to be used as a person delete—an ID Delete function already exists in PeopleSoft Campus Community to accomplish that task. Also, they are not to be used for mass purge and archive functions.

Understanding How the Prospect and Application Delete Feature Relates to ID Delete

To understand how the Prospect Delete and Application Delete processes work, you need to understand how these processes relate to the ID delete process.

Although the Prospect Delete and Application Delete processes remove prospect records and applications from the tables in your database, the identification number and personal data for the prospect or applicant still remain in the system. If you need to delete this information, use the ID Delete feature.

The ID Delete feature, because of its primary obligation to maintain referential integrity, searches for the presence of critical data elements on critical high-level tables prior to deleting individual identification numbers.

If the ID Delete feature finds no data for the identification number in these critical control tables, it proceeds with the deletion. However, if the feature does find data for the identification number, it cancels the deletion and displays a message of explanation.

The Prospect Delete and Application Delete processes prepare records for ID Delete when:

- No other prospect record or application exists.
- No student record exists for a matriculated applicant or active student.
- No student financials record exists.

When you create prospect records and applications, the system writes a corresponding row to the STDNT_CAREER table for each career of the prospect or applicant. The STDNT_CAREER table is one of the control tables that the ID Delete process searches prior to deleting an identification number. To ensure that you can delete an identification number after deleting a corresponding prospect record or application, the Prospect Delete and Application Delete processes check for critical data elements to determine if the identification number for the prospect or applicant meets certain conditions. If the identification number meets those conditions, the processes delete the identification number from the STDNT_CAREER table, and the identification number becomes eligible for ID delete—provided that it meets all the requirements of the ID Delete feature.

Likewise, when your institution processes application fees and enrollment deposits, the system writes a corresponding row to the ITEM_SF table, which flows up to the ACCOUNT_SF table (one of the four control tables in the ID Delete feature). On the ITEM_SF table, the Applicant Delete process changes the Application Number Deleted field from the default *No* to *Yes.*

The Prospect Delete and Application Delete processes remove data from the ID Delete control tables only if the data came from PeopleSoft Recruiting and Admissions processes, not data that originated from other applications in PeopleSoft Student Administration Solutions.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing IDs,” Deleting IDs

Common Elements Used in This Chapter

All Careers	Select this option to delete all academic careers for the prospect or applicant.
Career	If you selected the Specific Careers option, this check box is available for entry. Select to delete a specific career for a prospect or delete an application for a career for an applicant.
Comm (communications), **Chkl** (checklists), and **Cmts** (comments)	If you selected the Specific Careers option, select the appropriate check box to delete communications, checklists, and comments.
Communications (Comm), **Checklists** (Chkl), and **Comments** (Cmts)	Select the appropriate check boxes to delete any associated communications, checklists, or comments that are assigned to the prospect with the administration function PROS or PROP (for prospects) or ADMA or ADMP (for applicants) for the specified careers.
No Career Delete	Select this option to delete *no* prospect record for the prospect or applicant.
Specific Careers	Select this option to delete specific careers, if the prospect has more than one prospect record or the applicant has more than one application. When you select this option, the Career check box in the Specific Career(s) Delete Options group box becomes available for entry.
UnDelete	Select this check box to undelete a specific career.

Deleting a Prospect Record

This section lists prerequisites and discusses how to:

- Select the prospect records to delete.
- View the prospect delete holding table.
- Run the Prospect Delete process.

You can delete a prospect record for all careers or for a specific career. Specify the prospect information that you want to delete on the Prospect Delete page for each prospect record. Then run the Prospect Delete process *once* to delete all prospect records from the delete holding table. This process deletes the main structure data for the prospect, and (at your option) the 3C information (communications, checklists, and comments). You can also undelete a prospect record from the holding file, if you have not yet run the Prospect Delete process.

Prerequisites

Use the Prospect Program Data page to delete the application number from the prospect record. Delete the application number for this prospect in the Application Nbr (application number) field.

The system creates an application number automatically when you add an application, as long as a prospect record for this person does not exist. This is based on your installation table option settings.

Note. If the prospect record that you want to delete *also* has an application for the same academic career, you must first delete the application number from the prospect record. If the prospect record that you want to delete does *not* have an application for the same academic career, just delete the prospect record.

Remember to save the page. If you forget to delete the application number, the system provides a reminder message when you try to select a prospect for deletion.

If the prospect is an applicant or matriculated within the same academic career, you can still run the Prospect Delete process. However, the prospect does not qualify for subsequent ID delete because the prospect still has relations with the institution as an applicant or student.

See Also

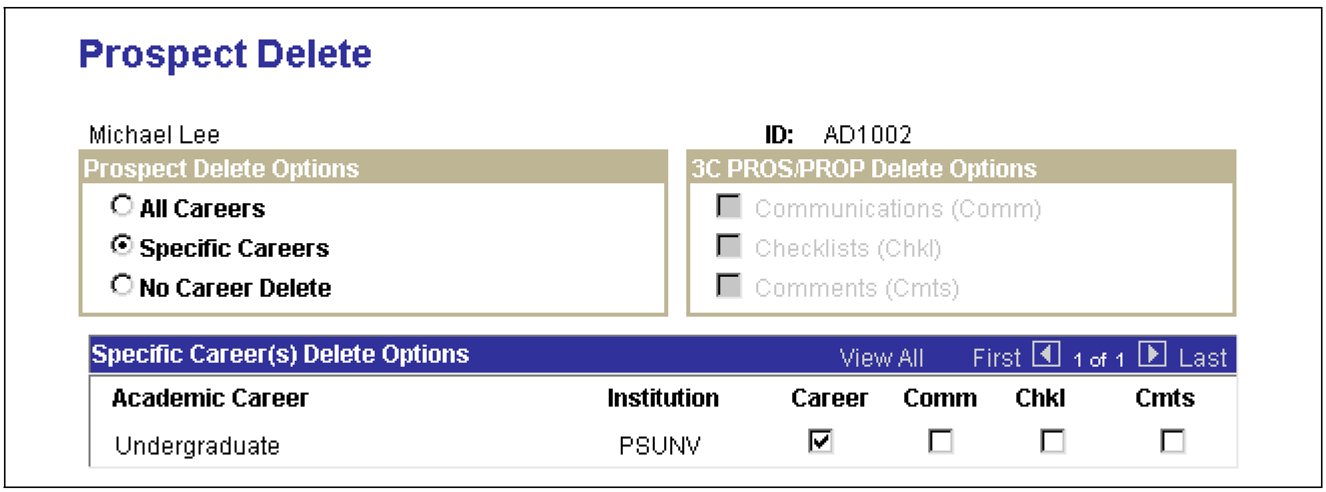
Chapter 9, "Recruiting Prospective Students," Adding Prospects, page 77

Pages Used to Delete a Prospect Record

Page Name	Object Name	Navigation	Usage
Prospect Delete	ADM_PRS_DELETE	Develop Enrollment, Recruit Prospective Students, Process, Prospect Delete, Prospect Delete	Select prospect records for deletion.
Prospect Delete Holding	ADM_PRS_DEL_SUSP	Develop Enrollment, Recruit Prospective Students, Process, Prospect Delete Holding, Prospect Delete Holding	Review the prospects that you marked for deletion on the Prospect Delete page, removing records from the table that were marked for deletion in error.
Prospect Delete Parms (prospect delete parameters)	ADM_PRS_DELETE	Develop Enrollment, Recruit Prospective Students, Process, Prospect Delete, Prospect Delete	Run the Prospect Delete process.

Selecting Prospect Records to Delete

Access the Prospect Delete page.



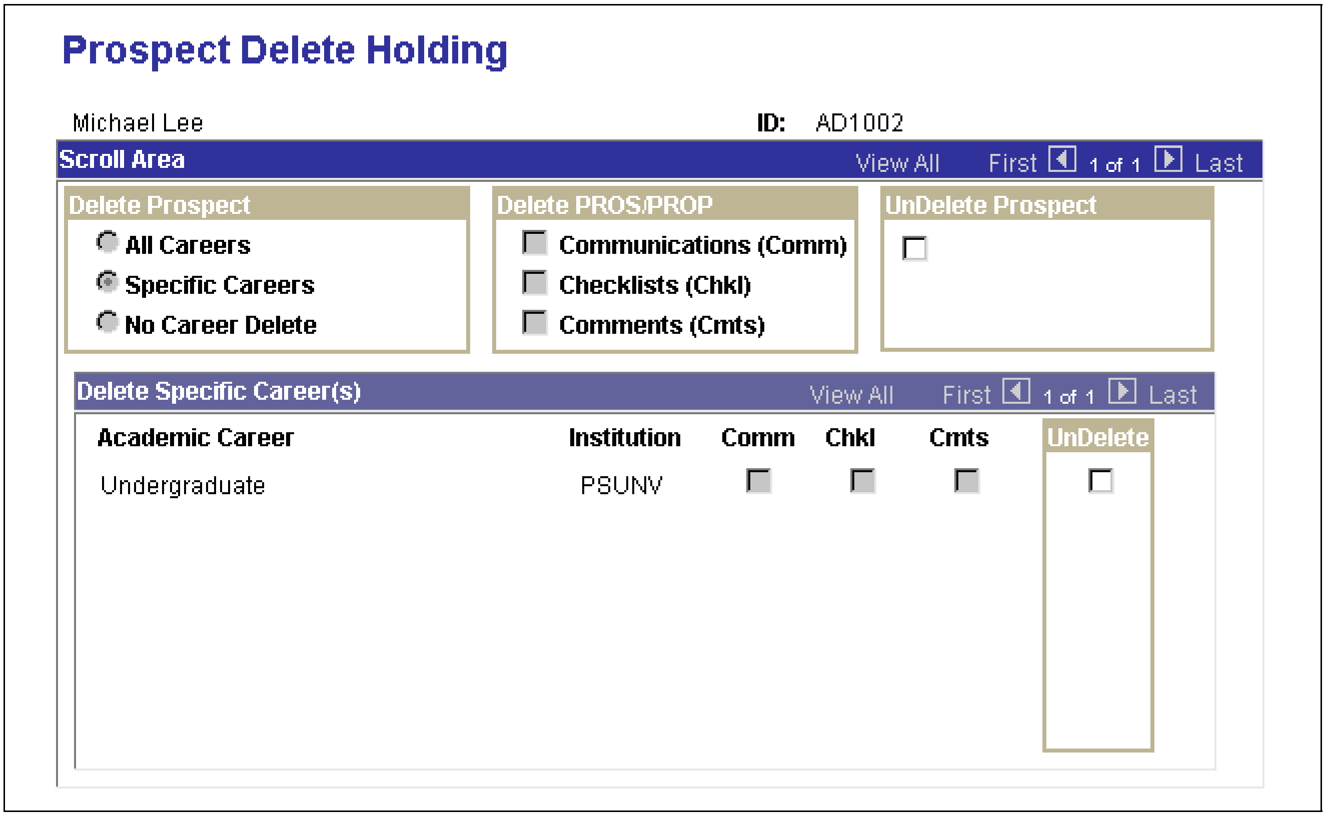
Prospect Delete page

The 3C PROS/PROP Delete Options group box refers to 3C entries that have the PROS, PROP, or PSSV administrative function for prospects *and* for which the variable data in the 3C record matches the career information that you requested to be deleted.

When you save the page, the prospect's identification number goes into a prospect delete holding table. You can then reenter the Prospect Delete page for any additional prospects that you want to delete. Run the Prospect Delete process only once to delete the prospect records that you entered in the holding table.

Viewing the Prospect Delete Holding Table

Access the Prospect Delete Holding page.



Prospect Delete Holding page

Before running the Prospect Delete process, review the prospects that you selected for deletion on the Prospect Delete page. You can undelete any records that you erroneously marked for deletion.

Undelete Prospect Select to undelete *all* careers.

When you save the page, the system removes the prospect records for the academic careers that you selected from the delete holding table. These prospect records will not be deleted.

Running the Prospect Delete Process

Access the Prospect Delete Parms page.

Click Run to run the Prospect Delete process at user-defined intervals, which deletes the prospect records that you marked for deletion in the holding table.

Technical Information

To prepare records for the optional ID Delete process, the Prospect Delete process analyses whether data should be deleted from the STDNT_CAREER table as follows:

- The process evaluates the ADM_APPL_DATA table for each prospect, searching for an application record in the academic career corresponding to the prospect record.
  - If the process finds an application, then it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as an applicant, with the academic institution. The prospect does not qualify for ID Delete.

- If the process does not find an application, then it evaluates the ACAD_PROG table.

• The process evaluates the ACAD_PROG table for each prospect, searching for a student record in the academic career and academic program corresponding to the prospect record.

- If the process finds a student record, it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as a student, with the academic institution. The prospect does not qualify for ID delete.

- If the process does not find a student record, it deletes the row containing the prospect's IDENTIFICATION NUMBER and ACAD_CAREER from the STDNT_CAREER table. The prospect meets both conditions and *might* qualify for ID delete.

Deleting an Application

This section lists prerequisites and discusses how to:

• Select the applications to delete.

• View the applicant delete holding table.

• Run the Application Delete process.

You can delete an application for all careers or for specific careers. Specify the applicant information that you want to delete on the Applicant Delete page for each application. Then run the Application Delete process *once* to delete all the applications that you entered in the applicant delete holding table. This process deletes the main structure data for that applicant and (at your option) the 3C information (communications, checklists, and comments). You can also undelete an application from the holding file, if you have not yet run the Application Delete process.

Prerequisites

Before you can delete an application that was put into the system by mistake:

1. Select Manage Student Records, Track Student Careers, Use, Student Program/Plan.
2. On the Student Program page, make sure that the applicant is not an active student in the academic career corresponding to the application.

   If the applicant has matriculated, delete the student records for the academic career and academic program corresponding to the application. Scroll to find and delete *only* the rows that correspond to the same academic career and academic program as the current application.

   If the applicant matriculated in multiple academic programs in the same academic career, and one of them is valid, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID delete because the applicant still has a relationship, as a student, in another academic program within the institution .
3. Select Develop Enrollment, Evaluate Applicants, Use, Application Maintenance, Application Program Data.
4. On the Application Program Data page, determine whether the applicant has another application in the same academic career corresponding to this application, but in a different academic program.

If the applicant has another application in the academic career, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID delete because the applicant still has a relationship, as an applicant, in another academic program within the institution.

5. Select Develop Enrollment, Recruit Prospective Students, Use, Prospect Data.

6. On the Prospect Program Data page, determine whether the prospect record has an application number; if the prospect record has an application number, delete it from the record.

   If you forget to perform this step, the system reminds you to do so when you try to select an application for deletion.

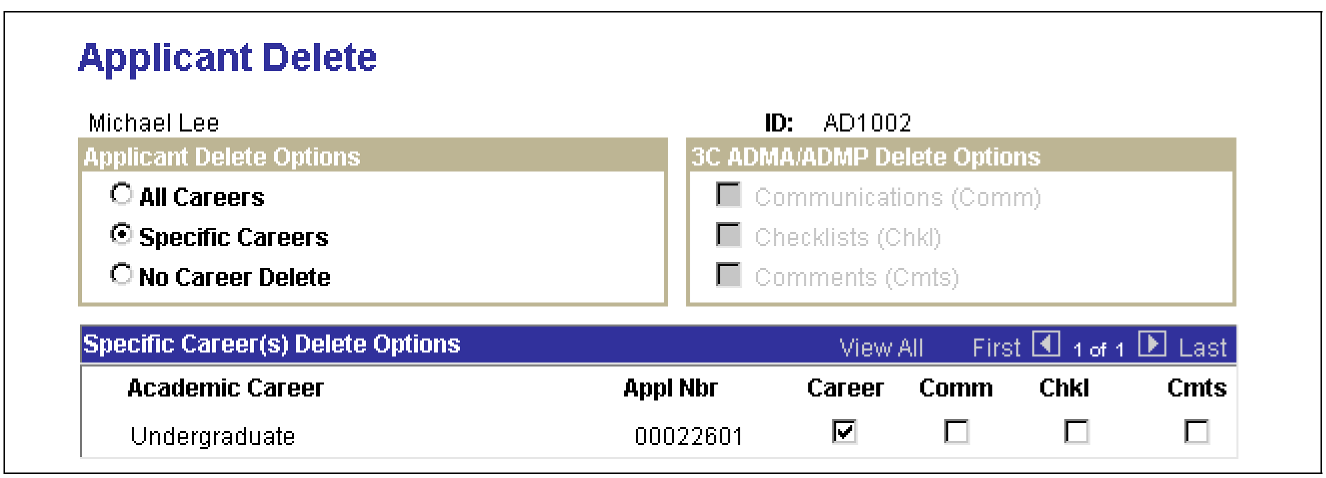
Note. The application number is created automatically if you add an application, and the prospect record does not exist, based on your setup on the Installation - AD page. Also, if the prospect record exists for the applicant, the applicant's identification number is not eligible for ID Delete because the applicant has a relationship, as a prospect, with the institution.

Pages Used to Delete an Application

Page Name	Object Name	Navigation	Usage
Applicant Delete	ADM_APP_DELETE	Develop Enrollment, Process Applications, Process, Applicant Delete, Applicant Delete	Select applications to delete.
Applicant Delete Holding	ADM_APP_DEL_SUSP	Develop Enrollment, Process Applications, Process, Applicant Delete Holding, Applicant Delete Holding	Remove records from the application delete holding table that were erroneously marked for deletion.
Application Delete Process	ADM_APPL_DEL_PARMS	Develop Enrollment, Process Applications, Process, Process Applicant Deletes, Applicant Delete Parms	Run the Application Delete process.

Selecting Applications to Delete

Access the Applicant Delete page.



Applicant Delete page

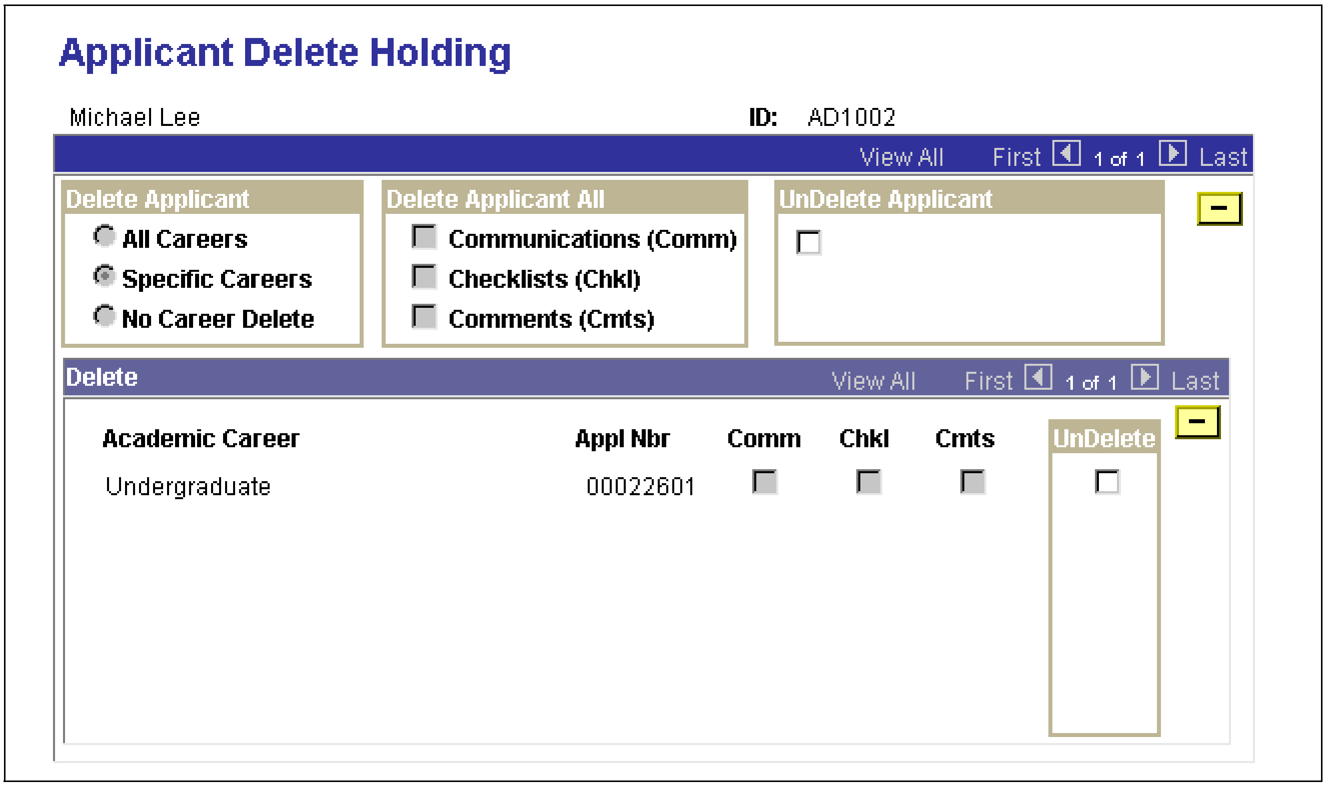
The 3C ADMA/ADMP Delete Options group box refers to 3C entries that have the ADMA or ADMP administrative functions for applicants, *and* that match the career information that you requested to be deleted.

Note. There can be more than one application for each academic career.

When you save the page, the applicant's identification number goes into an applicant delete holding table. You can then reenter the Applicant Delete page for any additional applicants that you want to delete. Run the Application Delete process once to delete all the applicants in the holding table.

Viewing the Applicant Delete Holding Table

Access the Applicant Delete Holding page.



Applicant Delete Holding page

Undelete Applicant Select to undelete *all* academic careers.

When you save the page, the system removes the applications for the academic careers that you select from the delete holding table. These applications will not be deleted.

Running the Application Delete Process

Access the Application Delete Process page.

Click Run to run the Application Delete process at user-defined intervals.

Technical Information

To prepare records for the optional ID Delete process, the Application Delete process analyses whether data should be deleted from ID Delete control tables:

- The process evaluates the ACAD_PROG table for each applicant, searching for a student record in the academic career corresponding to the application.
  - If the process finds a student record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a student, with the academic institution. Therefore, the applicant does not qualify for ID delete.
  - If the process does not find a student record, then it evaluates the ADM_APPL_PROG table.
- The process evaluates the ADM_APPL_PROG table for each applicant, searching for another application in the academic career corresponding to the application record.
  - If the process finds another application, it does not delete the row containing the applicant's Identification number from the STDNT_CAREER table because the applicant still has a relationship, as an applicant, with the academic institution. Therefore, the applicant does not qualify for ID delete.
  - If the process does not find an application, then it evaluates the ADM_PRSPCT_CAR table.
- The process evaluates the ADM_PRSPCT_CAR table for each applicant, searching for a prospect record in the academic career corresponding to the application record.
  - If the process finds a prospect record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a prospect, with the academic institution. Therefore, the applicant does not qualify for ID delete.
  - If the process does not find a prospect record, it deletes the row containing the applicant's IDENTIFICATION NUMBER, ACAD_CAREER, and CAR_REQ_TERM from the STDNT_CAREER table.
- The process updates the Application Number Deleted field on the ITEM_SF table from the default N to Y.
- The ITEM_SF table flows up into the ACCOUNT_SF table.

CHAPTER 29

Producing a Year to Year Comparison Report

This chapter discusses how to run the Admissions Funnel Report process to produce a year-to-year demographic comparison report.

Running the Admissions Funnel Report Process

This section discusses how to create an admissions funnel report.

PeopleSoft delivers an admissions funnel report that you can use to report on your prospect and applicant numbers across one or multiple terms. You can run this report in multiple formats showing varied data, depending on your criteria. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, academic program and so forth. You can also choose to include a comparison of terms on this report. The report calculates numeric and percentile representations of these comparisons.

Page Used to Run the Admissions Funnel Report Process

Page Name	Object Name	Navigation	Usage
Admissions Funnel Report Parameters	RUNCTL_ADFUNNEL	Develop Enrollment, Process Applications, Reports, Admissions Funnel Report	Run a demographic funnel report.

See Also

Chapter 20, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 382

APPENDIX A

PeopleSoft Recruiting and Admissions Reports

This appendix provides an overview of PeopleSoft Recruiting and Admissions reports and enables you to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

PeopleSoft Recruiting and Admissions Reports: A-Z

This table lists the PeopleSoft Recruiting and Admissions reports, sorted alphanumerically by report ID. The reports listed are Crystal and SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
ADAVGCUT Average Cutoff Report	Enables you to assess an evaluated applicant pool to determine the admissions averages that drive certain program actions. (SQR)	Develop Enrollment, Evaluate Applicants, Reports, Average Cutoff Report, Average Cutoff Report	RUNCTL_ADAVGCUT
ADFUNNEL Admissions Funnel	Lists prospect and applicant numbers across one or multiple terms. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, academic program and so forth. (SQR)	Develop Enrollment, Process Applications, Reports, Admissions Funnel Report	RUNCTL_ADFUNNEL
AD701 Admissions Action Table	Lists all program actions defined on the Program Action Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Admissions Action Table	PRCSRUNCNTL_AD_RC in the RUN_AD701 component

Report ID and Report Name	Description	Navigation	Run Control Page
AD702 Test Table	Lists all of the tests defined on the Test Tables page. (Crystal)	Design Student Administration, Design Admissions, Report, Test Tables	PRCSRUNCNTL_AD_RC page in the RUN_AD702 component
AD703 Recruiting Category Table	Lists all recruiting categories defined on the Recruiting Category Table page. (Crystal)	• Develop Enrollment, Manage Recruiters, Report, Recruiting Category Table • Design Student Administration, Design Admissions, Report, Recruiting Category Table	PRCSRUNCNTL_AD_RC page in the RUN_AD703 component
AD704 Referral Source Table	Lists all GPA types defined on the Referral Sources Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Referral Source Table	PRCSRUNCNTL_AD_RC page in the RUN_AD704 component
AD705 Region Table	Lists all regions defined on the Region Table page. (Crystal)	• Develop Enrollment, Manage Recruiters, Report, Region Table • Design Student Administration, Design Admissions, Report, Region Table	PRCSRUNCNTL_AD_RC page in the RUN_AD705 component
AD710 Summary Type Table	Lists all summary types defined on the External Summary Type Table page. (Crystal)	Design Student Administration, Design Admissions, Report, External Summary Type Tbl	PRCSRUNCNTL_AD_RC page in the RUN_AD710 component
AD711 Admit Type Table	Lists all admit types defined on the Admit Type Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Admit Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD711 component
AD712 Application Center Table	Lists all recruiting categories defined on the Application Center Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Application Center Table	PRCSRUNCNTL_AD_RC page in the RUN_AD712 component
AD713 Admission Evaluation Table	Lists all evaluation codes defined on the Evaluation Codes Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Evaluation Table	PRCSRUNCNTL_AD_RC page in the RUN_AD713 component
AD714 Evaluation Committee Table	Lists all evaluation committees defined on the Evaluation Committee Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Evaluation Committee Table	PRCSRUNCNTL_AD_RC page in the RUN_AD714 component
AD715 Evaluation Status Table	Lists all evaluation statuses defined on the Evaluation Status Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Evaluation Status Table	PRCSRUNCNTL_AD_RC page in the RUN_AD715 component
AD716 GPA Type Table	Lists all GPA types defined on the GPA Type Table page. (Crystal)	Design Student Administration, Design Admissions, Report, GPA Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD716 component

Report ID and Report Name	Description	Navigation	Run Control Page
AD717 GPA Rules Tables	Lists all GPA conversion rules defined on the GPA Rules Table page. (Crystal)	Design Student Administration, Design Admissions, Report, GPA Rules Table	PRCSRUNCNTL_AD_RC page in the RUN_AD717 component
AD718 Material Group Table	Lists all material groups defined on the Material Group Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Material Group Table	PRCSRUNCNTL_AD_RC page in the RUN_AD718 component
AD719 Rating Scheme Table	Lists all rating schemes defined on the Rating Scheme Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Rating Scheme Table	PRCSRUNCNTL_AD_RC page in the RUN_AD719 component
AD721 Recruiting Center Table	Lists all recruiting centers defined on the Recruiting Center Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Recruiting Center Table	PRCSRUNCNTL_AD_RC page in the RUN_AD721 component
AD724 Rating Scheme Component Table	Lists all rating components defined on the Rating Comp Def Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Rating Component Table	PRCSRUNCNTL_AD_RC page in the RUN_AD724 component
AD726 Program Action Reason Table	Lists all program action reasons defined on the Program Action Reasons Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Program Action Reason Table	PRCSRUNCNTL_AD_RC page in the RUN_AD726 component
AD727 Material Type Table	Lists all material types and their variable data. (Crystal)	Design Student Administration, Design Admissions, Report, Material Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD727 component
AD728 School Type Table	Lists all GPA types defined on the School Types Table page. (Crystal)	Design Student Administration, Design Admissions, Report, School Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD728 component
AD729 Test Component Table	Lists all of the test components defined on the Test Components Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Test Component Table	PRCSRUNCNTL_AD_RC page in the RUN_AD729 component
AD730 Target Cohort Table	Lists all enrollment management target cohort levels that your institution has defined. (Crystal)	Develop Enrollment, Manage Enrollment, Report, Enrollment Target Cohort	PRCSRUNCNTL_AD_RC page in the RUN_AD730 component
AD731 Target Division Table	Lists all enrollment management target population levels that your institution has defined. (Crystal)	Develop Enrollment, Manage Enrollment, Report, Enrollment Target Division	PRCSRUNCNTL_AD_RC page in the RUN_AD731 component
AD732 Target Population Table	Lists all enrollment management target division levels that your institution has defined. (Crystal)	Develop Enrollment, Manage Enrollment, Report, Enrollment Target Population	PRCSRUNCNTL_AD_RC page in the RUN_AD732 component

Report ID and Report Name	Description	Navigation	Run Control Page
CC720 Postal Code Table	Lists all postal codes defined on the Region Postal Code Table page. (Crystal)	Design Student Administration, Design Admissions, Report, Region Postal Table	PRCSRUNCNTL_AD_RC page in the RUN_CC720 component

PeopleSoft Recruiting and Admissions Reports: Selected Reports

This section provides detailed information about individual reports including important fields and tables accessed. The reports are listed alphanumerically by report ID.

ADAVGCUT

Institution Enter the institution name.

Academic Program Enter the academic program for which you want to generate an average cutoff report.

Admit Term Enter the admit term for which you want to generate an average cutoff report.

Running the process creates a file called adavgcut.lis. Use this file to view the output.

Note. If you enter an academic program and admit term combination that is not set up in the Average Cutoff Table page, you receive a blank report.

ADFUNNEL

Define the data that you want to appear in your report in the Report Request Parameters section.

Report Grouping Group the data on your report. The default is to have the report grouped by at least the application type and status *(Only by Application Type, Status)*. However, you can select a different option to group the report by other criteria in addition to application type and status. For example, if you select *Also by Application Method,* then the report will be grouped by application type, status, and application method. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Only by Application Type, Status, Also by Application Method, Also by Ethnicity, Also by Event Type, Also by Gender, Also by Program, Also by Region,* and *Also by State.*

Create Compare Report Select if you want to compare terms on this report. Once this check box is selected, additional fields appear on the screen enabling you to select additional terms. If you want to report on only one term, clear this check box.

Show Term Detail Select if you want to see the set of terms and details regarding those terms. You can view details of up to five terms. If you have selected more than five terms and you select this check box, you will receive an error message. Clear this check box if you prefer to see your data in one group.

All Terms for Academic Year
Select the year for which you want to run the report. Once you select an academic year, the admit terms defined for that year automatically appear. You can remove any of the terms that you do not want to see. You must select a year for the Admissions Funnel Report process to run successfully.

All Terms in Comparison Year
If you are running a comparison report, select the year to which you are comparing.

Admit Term
The system populates the admit terms based on the year you selected in the All Terms for Academic Year. You can add and delete the admit terms if you want. However, you must select at least one admit term for the Admissions Funnel Report process to run successfully.

Comparison Admit Term
Once you select a comparison year, the admit terms defined for that year automatically populate these fields. You can remove any of the terms you do not want to see.

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.

Index

L

M

N

O

S