ORACLE®

PEOPLESOFT

PeopleSoft CRM for Higher Education 9.1 PeopleBook

May 2012

ORACLE®

PeopleSoft CRM for Higher Education 9.1 PeopleBook
SKU crm91ched-b0512

Contents

Chapter 5

Chapter 6

Appendix A

Oracle's PeopleSoft CRM for Higher Education Preface

This preface discusses:

- PeopleSoft application fundamentals.

- PeopleSoft automation and configuration tools.

- PeopleSoft business object management.

- PeopleSoft product and item management.

- PeopleTools PeopleBooks.

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 CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews.

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

PeopleSoft Automation and Configuration Tools

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management.

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools.

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration Tools.

  This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge Management.

  This part discusses the setup of Verity search.

- Business process management.

  This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

  - The setup of the BPEL infrastructure to initiate and manage BPEL process instances.

  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.

  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.

  - The setup and execution of business projects.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook

PeopleSoft Business Object Management

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* has these parts:

•   Business Object Management Basics.

    This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

•   Data Management for Organization Business Objects.

    This part discusses how to set up and manage companies, sites, and partner companies.

•   Data management for Individual Business Objects.

    This part discusses how to set up and manage persons, including contacts and consumers, and workers.

•   Business Object Management.

    This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

•   Customer and Worker Data Integrations.

    This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook

PeopleSoft Product and Item Management

The *PeopleSoft CRM 9.1 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft CRM 9.1 Product and Item Management PeopleBook

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.52 PeopleBooks.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.

- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.

- Typographical conventions and visual cues used in PeopleBooks.

- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.

- Common elements used in PeopleBooks.

- Navigating the PeopleBooks interface and searching the PeopleSoft online library.

- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the locally installed PeopleSoft online library, including web site folders.

- Understanding documentation integration and how to integrate customized documentation into the library.

- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft CRM for Higher Education

This chapter provides an overview of PeopleSoft CRM for Higher Education and discusses:

- PeopleSoft CRM for Higher Education business processes.

- PeopleSoft CRM for Higher Education integrations.

- PeopleSoft CRM for Higher Education implementation.

PeopleSoft CRM for Higher Education Business Process

PeopleSoft CRM for Higher Education 9.1 delivers deep integration with PeopleSoft Campus Solutions for best practices recruitment and retention business process flows. Additionally, a constituent contact center solution along with a Constituent 360-Degree View provides your staff with the constituent insight they need to efficiently do their jobs.

CRM Higher Education includes features in the following areas:

- Recruiting.

- Retention.

- Service Center for Higher Education.

- Constituent 360-Degree View.

Recruiting

With more than 2.5 million students matriculating to a college campus for the first time each year, the role and responsibility of admission and enrollment personnel in higher education has become increasingly critical to the success of the institutions and the experience of the student.

The recruitment funnel, where a high number of inquiries of prospective students from numerous entry points narrows to and moves toward application and ultimately a smaller number of matriculated students, is starting earlier and lasting longer and requires targeted and accurate communication to move that prospective student through the funnel successfully.

To better align with the recruitment process of HE institutions and to provide recruiters with more of the tools they need to be successful, PeopleSoft CRM for Higher Education 9.1 is the system of record for recruiting. You can create prospective students (and their related academic information) manually in CRM for Higher Education, have them self-register via the web, or load the information in bulk through the Prospective Student Import feature.

To facilitate recruiting, CRM for Higher Education includes features to better assign recruiters to suspects and prospects and to provide them with better data and contact management tools that they need to manage those relationships. Additionally, an Event Management module is available to help manage and market recruiting events.

Recruiting-related features include:

- *Prospective Student Import*: Allows the bulk import of suspects and prospects into CRM for Higher Education. Prospective students can be loaded directly into CRM for Higher Education using the import feature or sourced from the Campus Solutions test score loads.

- *Manual Creation of Suspect and Prospects*: You can manually create and maintain suspects and prospects directly in CRM for Higher Education rather than having to create them in Campus Solutions and push them across.

- *Search/Match Capability*: Identifies potential duplicates for resolution when suspects and prospects are imported into CRM for Higher Education.

- *Lead and Opportunity Enhancements:* When a prospect is qualified from marketing activities, a lead is typically created in the Sales module and assigned to a recruiter. CRM for Higher Education 9.1 delivers an assignment group to support the automatic assignment of recruiters and recruiting teams for Higher Education leads and opportunities. You can now assign recruiters by zip code of the last school attended and by institution, career, program, and plan for a more specialized recruiter. The recruiter can then follow up on the lead and track the progress of the prospect through the multiple lead statuses available.

- *Enhanced Integration with Campus Solutions:*CRM for Higher Education provides a robust integration between CRM and Campus Solutions for tracking the constituent lifecycle status from suspect to prospect to applicant to student to alumnus in order to ensure that recruiting, retention, and alumnus communications are targeted to the right audience. Features include:

  - *Control table loads (from CS to CRM)*: Setup information including academic structure, academic type and load, and school information is sent to CRM for Higher Education so that prospective students can be created in CRM for Higher Education. Additionally, security constructs including institution, career, program and plan security by user ID, and test ID security are sent to CRM for Higher Education so that PeopleSoft CRM for Higher Education respects the same security out of the box as the Campus Solutions system.

  - *Incremental Syncs (from CS to CRM)*: To provide a real time update from Campus Solutions to CRM for Higher Education, incremental syncs are included for prospect, applicant, and student data. As changes are made in Campus Solutions to the prospect, applicant, or student (including applicant status, change of program, plan, and so on), real time messages are sent to CRM so that CRM always has the most up-to-date information about that constituent, ensuring accurately targeted communications.

  - *Test Score Publication (from CRM to CS)* After an applicant is created in Campus Solutions, a message is sent to CRM that determines whether that person already exists as a prospect and, if so, updates him or her to an applicant. Additionally, if CRM has captured any official or self-reported test scores, information related to the applicant, or both, that information is published to Campus Solutions because it might be required as part of the application evaluation process

PeopleSoft CRM for Higher Education 9.1 and Campus Solutions provide an end-to-end recruiting solution that enables tracking of the constituent life cycle from suspect through to alumnus with real-time integration to ensure that any outbound communications (both internally and externally) are accurately targeted.

See and *PeopleSoft Event Management 9.1 PeopleBook*, "Oracle's PeopleSoft CRM Event Management Preface."

Retention

The cost of replacing a student is far higher than retaining one. Therefore, after you have recruited and enrolled the best set of applicants, you want to ensure that you retain them. In CRM for Higher Education 9.1, several features are included that enable higher education institutions to retain more students by deepening their relationships using all the information they know about the students and by better resolving their issues. Features include:

- Leveraging Campus Solutions Data: To successfully retain students, you need to have access to the student data that gives you a better picture of what is going on with the student and whether he or she is at risk. Some at-risk factors might be financial needs, decreasing GPA, and lack of participation in classes, clubs, and so on. You need to be able to identify these red flags that are typically stored in Campus Solutions and proactively reach out to the student before it is too late. In CRM for Higher Education 9.1, you can access student information in two ways:

  - *Student Enterprise Integration Point (EIP)*: This EIP sends student information, including student program, plan, and status information (program actions and action reasons, such as withdrawn and transferred out) from Campus Solutions to CRM for Higher Education. If a student's status changes or the student changes programs or plans, then a real time message is sent to CRM for Higher Education to reflect that change.

  - *Dynamic Access of Student Data:* Rather than having to bring all of the student information to CRM for Higher Education, this feature enables the enrollment manager to dynamically access student data when building an audience for a retention program. In this way, an institution can set up its definition of an at-risk student on the Campus Solutions side and have CRM for Higher Education dynamically access that data when creating the audience.

-

Now you can run retention programs to proactively reach out to these students. You can use surveys to learn more about areas of dissatisfaction or concern and take action such as sending alerts to relevant staff and faculty, setting up a meeting with the student, calling the student, or replying with a personalized email that directly addresses the student's concerns. In addition to creating a two-way communication with the at-risk student, you can invite him or her to targeted retention events that provide face-to-face assistance.

Service Center for Higher Education

To address service delivery challenges for higher education institutions, PeopleSoft CRM for Higher Education 9.1 delivers the Service Center for Higher Education, providing a centralized one-stop-shop institution-wide service solution. With this solution, you can differentiate your institution with an outstanding service experience, reduce the cost to serve with streamlined service-delivery processes and prebuilt integration, and ultimately leverage the positive service interaction to improve your higher education institution's brand and retain constituents and employees.

The Service Center for Higher Education delivers two contact centers in one: an employee and constituent IT Helpdesk and a constituent contact center across all phases of the constituent life cycle. The Service Center for Higher Education leverages a strong multichannel contact center foundation providing self-service, case management, issue diagnosis, and knowledge management with a strong workflow engine for rapid and consistent inquiry resolution across channels. On top of this contact center foundation, the Service Center for Higher Education delivers capabilities specific to higher education.

Constituent 360–Degree View

In Higher Education institutions, constituent relationship management typically starts from the initial recruiting process and extends into alumni relations. During this life cycle, a constituent may participate in various activities that result in transaction data being created. Higher Education business users also frequently communicate with constituents while trying to recruit them, retain them, or service their requests. This useful interaction information is stored in the system. To effectively manage the relationship with a constituent, all its available transaction and communications data needs to be consolidated and summarized in one place so that users can view it in order to take informed actions.

To satisfy this business need, a powerful feature called the Constituent 360-Degree View is included in CRM for Higher Education 9.1. This functionality enables a holistic, actionable view of the constituent that combines CRM and Campus Solutions data in real time and is configurable depending on the role (marketer, recruiter, advisor, and so on) of the user who is accessing the 360-Degree View. The 360-Degree View can be accessed from multiple transactions within CRM for Higher Education, including Telesales, Event Management, Leads and Opportunities, and Support. Depending on who is accessing it, the 360-Degree View displays information relevant to that person's role while maintaining security for any data (such as financial information) to which that role should not have access.

PeopleSoft CRM for Higher Education Integrations

PeopleSoft CRM for Higher Education integrates with PeopleSoft Online Marketing and PeopleSoft Marketing.

We discuss integration considerations in the implementation chapters of this PeopleBook.

Supplemental information about third-party application integrations is located on the My Oracle Support website.

PeopleSoft Online Marketing

PeopleSoft Online Marketing adds custom actions in the Dialog Designer that allow you to further automate dialogs and convert dialog response to actions, delivering a personalized follow-up experience for each dialog recipient. New actions include the ability to send an SMS message, create a lead, add a person to a PeopleSoft TeleSales campaign, and send print correspondence.

You can also design online dialogs that allow you to target particular audiences. You can pre-fill information such as the constituent's name and email address, saving the constituent time when filling out the survey. Based on how the constituent responds, you can include different associated actions. For example, if the student checked off that they were not satisfied with the level of advising and mentoring they are receiving, that can trigger an action like an alert to the head of advising. Other actions can display dynamic content based on their response. For example, if the student indicates that he would like some help with study skills, you can then display info about a study skill seminar on the next web page or send an email with an invitation to the seminar. You can also capture text responses.

PeopleSoft Marketing

PeopleSoft Marketing allows you to create dynamic audiences based on data from PeopleSoft Campus Solutions without requiring you to sync data between the two databases.

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Oracle's PeopleSoft CRM Marketing Applications Preface."

PeopleSoft Event Management

CRM for Higher Education integrates with PeopleSoft Event Management to help higher education institutions plan, promote, execute and analyze a wide range of virtual and in person events, from open houses, recruiting and fundraising events to speaker series, seminars and webinars, and conferences. Event Management can help you to plan and manage events as an effective channel to drive your marketing goals, while keeping costs down.

See and *PeopleSoft Event Management 9.1 PeopleBook*, "Oracle's PeopleSoft CRM Event Management Preface."

PeopleSoft Campus Solutions

CRM for Higher Education integrates with PeopleSoft Campus Solutions, allowing you to track the constituent life cycle status from suspect to prospect to applicant to student to alumnus in order to ensure that recruiting, retention, and alumnus communications are targeted to the right audience. Other areas of integration include:

- The ability to push test scores to CRM for Higher Education without creating new persons in Campus Solutions.

- The ability for prospect and test score data sent from Campus Solutions to be processed and stored in a temporary staging area for further import processing.

- The ability to run a Search/Match process on imported data so that any potential duplicates can be identified and resolved.

- Control table loads from Campus Solutions to CRM, sending setup information including academic structure, academic type and load, and school information to CRM for Higher Education so that prospective students can be created in CRM for Higher Education. Security constructs including institution, career, program and plan security by user ID, and test ID security are sent to CRM for Higher Education so that PeopleSoft CRM for Higher Education will respect the same security out of the box as the Campus Solutions system.

- Incremental syncs from Campus Solutions to CRM for prospect, applicant, and student data. As changes are made in Campus Solutions to the prospect, applicant, or student, real-time messages are sent to CRM so that CRM always has the most up-to-date information about that constituent.

- Test score publication from CRM to Campus Solutions: If CRM has captured any official or self-reported test scores, information related to the applicant, or both, that information is published to Campus Solutions.

- Enterprise Integration Points (EIPs), including the Student Status Change EIP, which sends student information from Campus Solutions to CRM for Higher Education (including student program, plan, and status information).

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook*

See *PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook*

PeopleSoft Call Center

The Service Center for Higher Education delivers two contact centers in one: an employee and constituent IT Helpdesk and a constituent contact center across all phases of the constituent life cycle.

To make access to Campus Solutions seamless to the agent, the Service Center for Higher Education delivers predefined action links. Action links are similar in concept to favorites in your web browser, providing a list of various pages in Campus Solutions grouped by category. Over 45 action links are delivered and grouped into the categories of Campus, Admissions, Academics, Financials, and Donors/Alumni.

Service Center for Higher Education also delivers the tools needed to handle and resolve IT inquiries, from performing a password reset for a student, managing change requests, and fixing lecture hall projectors for faculty to doing on-campus computer lab repair. With embedded IT Infrastructure Library (ITIL) best practices for managing incidents, problems, service requests, and other IT service processes, Oracle delivers a complete, integrated IT service and support solution.

See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Oracle's PeopleSoft CRM Call Center Applications Preface."

360 Degree View

The 360 Degree View includes a Constituent 360-Degree View, which enables a holistic, actionable view of the constituent that combines CRM and Campus Solutions data in real time and is configurable depending on the role of the user who is accessing the 360-Degree View. The 360-Degree View can be accessed from multiple transactions within CRM for Higher Education, including TeleSales, Event Management, Leads and Opportunities, and Support. Depending on who is accessing it, the 360-Degree View displays information relevant to that person's role as well as securing any data (such as financial information) to which that role should not have access. The 360 Degree View also has a delivered framework so that you can choose to display data from any third-party database such as a housing system, learning management system and so on

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Oracle's PeopleSoft CRM Application Fundamentals Preface."

PeopleSoft Sales

In CRM for Higher Education, you can assign recruiters by zip code of the last school attended and by institution, career, program, and plan for a more specialized recruiter. The recruiter can then follow up on the lead and track the progress of the prospect through the multiple lead statuses available.

See and *PeopleSoft Sales 9.1 PeopleBook*, "Oracle's PeopleSoft CRM Sales Preface."

PeopleSoft CRM for Higher Education Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleSoft documentation.

This table lists all of the components that have component interfaces:

Component	Component Interface	Reference
Test Score to Results Configuration Mapping RB_SM_CFG_MAP	RB_SM_CFG_MAP_CI	See and Chapter 2, "Recruiting Students," Using Prospective Student Import, page 9.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,PeopleSoft CRM 9.1 Business Object Management PeopleBook,* and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook* with information on where to find the most up-to-date version of each.

See Also

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

Chapter 2

Recruiting Students

This chapter provides an overview of the student recruiting process and includes the following sections:

- Using Prospective Student Import
- Using the Search/Match Capability
- Manually Creating Suspects and Prospects
- Using Leads and Opportunities for Recruiting
- Integrating with Campus Solutions

Overview of the Student Recruiting Process

One of the biggest challenges higher education institutions are facing today is related to recruiting. There are many choices out there for prospective students: community colleges, public institutions, private institutions, virtual universities, and so forth. In fact many students "swirl" amidst some of these options. With all the choices out there, all the information now readily accessible to prospects on the web, and recruiting efforts starting earlier and earlier, it has become harder to stand out in the crowd. Institutions need to not only generate awareness, but also be able to demonstrate that they have exactly what you are looking for and that they are the right choice—and then to deliver on it so that word of mouth feedback on social networking sites works in your favor.

See Also

PeopleSoft Event Management 9.1 PeopleBook, "Oracle's PeopleSoft CRM Event Management Preface"

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Introducing Customer Relationship Management for Higher Education"

PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook

Using Prospective Student Import

This section describes the process for importing suspects, prospects, and test scores into CRM. It contains the following sections:

- Understanding Prospective Student Import.

- Understanding Prospect and Test Score Importing.

- Understanding Staging.

- Populating the Staging Area.

- Managing Import Batches.

- Running the Import and Purge Processes.

- Understanding the Import Process.

- Understanding the Purge Process.

- Managing Import Rows.

- Creating Suspects and Prospects Manually.

Pages Used With Prospective Student Import

Page Name	Definition Name	Navigation	Usage
Manage Import Batches	RB_CIM_BATCH_SRCH	Customers CRM, Prospective Student Import, Manage Import Batches	Search for batches to import or purge.
Run Import/Purge	RB_CIM_BAT_RUN_SEC	Click the Import or Purge button on the Manage Import Batches page.	Confirm batches to import or purge.
Import Batch	RB_CIM_BATCH_DTL	Click a batch link on the Manage Import Batches page.	Import or purge batches.
Prospect Import Mapping	RB_SM_CFG_MAP	Set Up CRM, Utilities, Search/Match, Prospect Import Mapping	Maps Test IDs to Configuration IDs.
Manage Import Rows	RB_CIM_ROW_DTL	Customers CRM, Prospective Student Import, Manage Import Rows	Review and change import row status.

Understanding Prospective Student Import

The Prospective Student Import feature allows the bulk import of suspects and prospects into CRM for Higher Education. Prospective students can be loaded directly into CRM for Higher Education using the import feature, or sourced from the Campus Solutions test score loads. Campus Solutions test scores can be pushed to CRM for Higher Education without creating new persons in Campus Solutions, therefore allowing CRM to be the system of record for suspects and prospects and preventing thousands of prospective students from cluttering the Campus Solutions database.

The following functionality is included in CRM for Higher Education for the Prospective Student Import:

- An out-of-the-box integration with Campus Solutions, by which prospect and test score data sent from Campus Solutions can be processed and stored in a temporary staging area for further import processing.

- A standard XML message structure for Higher Education prospects, which allows prospect data from an external source to be imported directly into CRM.

- An import process that extracts raw data from the staging area, processes the data (validates it, transforms it, and identifies duplicates), and then posts it into the CRM Customer Data Model (CDM) and customer profile tables.

- A purge process that permanently deletes staging area data that is no longer needed.

Understanding Prospect and Test Score Importing

You can import prospect information into CRM in two ways:

- Import from Campus Solutions.

- Import directly into CRM.

The following diagram shows the import process, with data coming from Campus Solutions into CRM and from an external source into CRM.
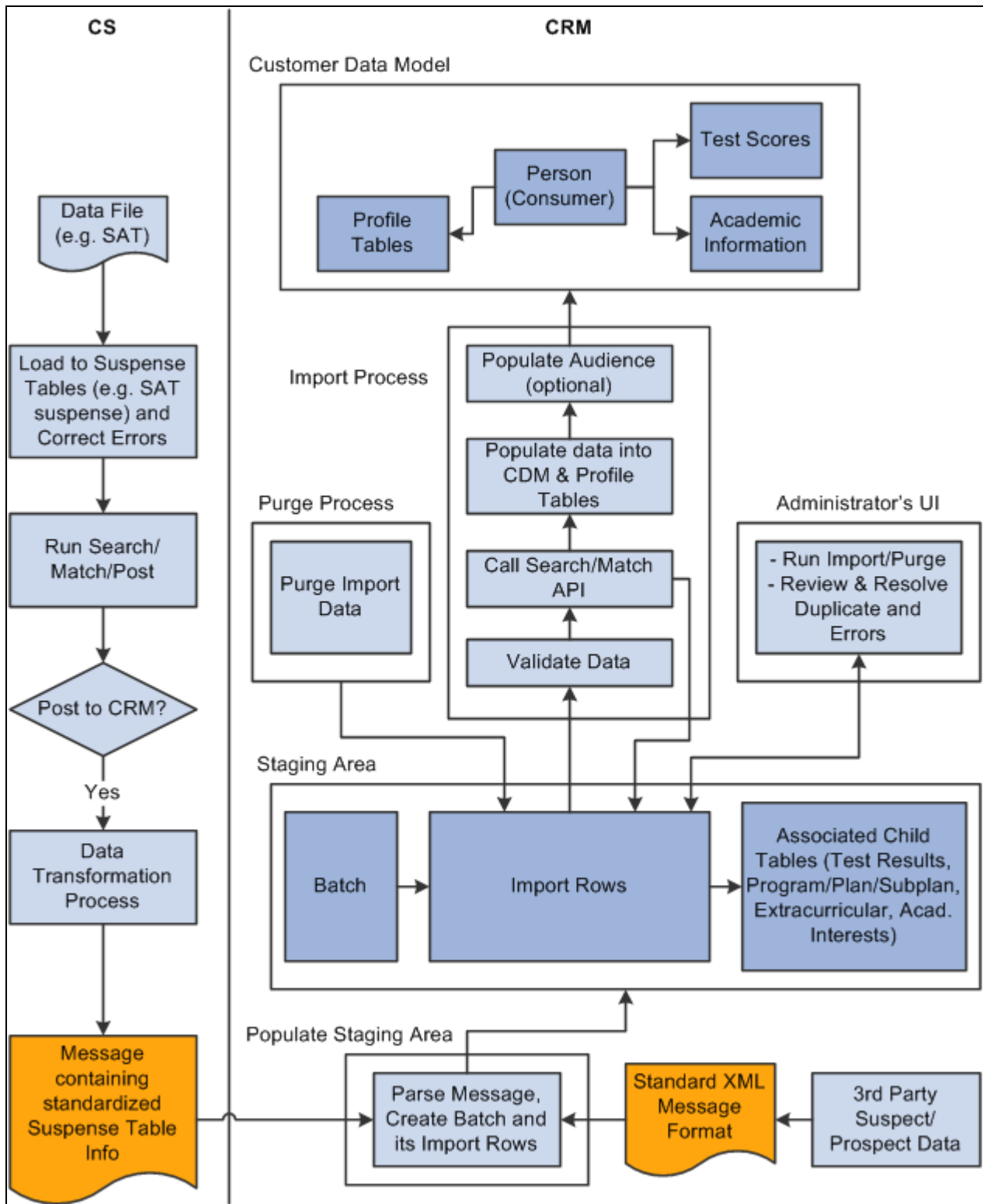
Importing Prospects and Test Scores into CRM

Importing from Campus Solutions

Search Tape (such as CSS) and Test Score (such as SAT or ACT) files, each of which contain a large number of records of individuals, are first loaded into the Campus Solutions staging area. If any errors exist, they are corrected. The Search/Match/Post process is run, one Test ID at a time. This process performs a Search/Match on the records and then posts them either to Campus Solutions tables or to CRM (this option is configurable in Campus Solutions). If data is to be posted to CRM, a standardized message containing each individual's biographical and demographic ("bio/demo") data and other information if it is available (test scores, program/plan/subplan information, academic interests, and extracurricular activities) is sent to CRM via EIP. The CRM integration broker parses the message and stores it as a batch in the CRM Import Staging Area. Each batch consists of a set of import rows, each of which has associated child records.

Direct Import Into CRM

You can also import a list of prospects directly into the CRM staging area from an external source (such as a spreadsheet created at a recruiting event, or a third-party system). In this case, the external source sends CRM a message conforming to a standard message format that CRM can recognize. At this point, a new batch is created in the CRM staging area.

Staging

After a batch is in the staging area, it can be imported into the final Customer Data Model (CDM) tables by an import process that is run by the CRM Administrator. The import process performs the tasks of validating each of the batch's import rows, calling the Search/Match functionality to identify potential duplicates, transforming the data, optionally populating an audience list, and then posting it to Customer Data Model (and Profile) tables. The administrator manually resolves import rows that are not posted to CDM because of errors, or those that are put in suspended state (because potential duplicates were found in CDM) and the import process is re-executed on the batch. Afterward, a purge process cleans up the staging area tables by deleting data that the import process no longer needs.

Prospect and test score data is received by CRM in the form of XML messages. These messages are processed by the integration broker subscription code and then stored in the staging area for processing by the import process. Messages sent by Campus Solutions after a Search/Match/Post run are in a standardized form so that CRM can process them the same way irrespective of the type Search Tape or Test Score they represent. Messages sent by external sources (other than Campus Solutions) must also conform to a standard message format, and the import process handles them in the same manner as messages from CS.

Importing Test Scores

You can import the following test score data from Campus Solutions (CS) into CRM:

- ACT

- AP

- CRS

- DAT

- EOS

- GMASS

- GMAT

- GRE

- LSAT

- SAT

- SSS

- TOEFL

Understanding Staging

CRM receives prospect and test score data in the form of XML messages. These messages are processed by the integration broker's subscription code and then stored in the Staging Area for processing by the Import Process. Messages sent by Campus Solutions after a Search/Match/Post run are in a "standardized" form so that CRM can process them the same way regardless of the type of search tape or test score that they represent. Messages sent by external sources (other than Campus Solutions) must also conform to a standard message format, and the Import Process processes them in the same manner as messages from Campus Solutions.

Messages from Campus Solutions

To summarize, the message consists of the following parts. The specifics of these parts are discussed in the Campus Solutions documentation.

- The header record SAD_HEADER_CRM

- Standardized Bio-Demo and Prospect combined record (SAD_BIO_PRS_SUS)

- Mapped Prospect child records (SAD_PRS_INIT_SUS, SAD_PRS_EXT_SUS, SAD_PRS_COM_SUS)

- Standardized test score record (SAD_TST_COM_SUS)

- Test-specific suspense records (includes the candidate data): Note that the test-specific suspense record (candidate data) is specific to each type of test and is not processed by CRM even if it is sent by Campus Solutions.

- Name/Value pairs (SAT_TEST_POST_NAME_VAL_PART_DS).

See *PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook*

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook,* "Introducing Customer Relationship Management for Higher Education"

Messages from External Systems

For loading prospects from sources other than Campus Solutions directly into CRM, CRM includes a standard XML message specification that it recognizes as a Higher Education prospect load message. External sources must convert their prospect data into this format before sending it to CRM. This message is parsed, placed in the Import Staging Area, and processed by the Import Process just as the Campus Solutions messages are processed. The mechanism to load prospect data from Campus Solutions and from other external sources into CRM is the same.

A Test ID named EXT is included as system data in CRM to support external prospect loads. Messages from sources other than Campus Solutions must have Test ID set to *EXT* in the messages that they send to CRM.

The Staging Area

Prospect records (and their associated data) to be imported into CRM are first placed in the common staging area. This is a temporary storage area and consists of a set of standard, related tables that are populated from the message data received by CRM. When it is run, the Import Process uses data from the staging area to create the final "production" tables in the Customer Data Model (and other profile tables). Thus, the staging area is the common "gateway" for bulk importing Higher Education-related prospect data into CRM.

Import Batches

A batch (also called an "import batch") is a collection of prospects, suspects, and test scores sent by Campus Solutions or a third party to CRM as part of a single message. A batch is also the "unit of work" for Import and Purge processing in CRM. That is, the Import Process and Purge Process run on a per-batch basis. Note that if someone on campus re-posts the same test or tape, a new batch is created because it is a separate post

The Batches entity stores the header information of each batch created in CRM. Every batch can be uniquely identified by a Batch ID, which is the primary key of the Batches entity. A Batch usually belongs to single Test ID. However, multiple batches exist at any time for the same Test ID. A new, unique Batch ID is generated for every new batch created.

Note. Batches usually belong to the same Test ID, but TEST_ID_OVRD (Test ID Override) can be used to load different test score values for a different test (for example, it is used by Campus Solutions for SAT, which has SAT I and SAT II scores within the same load. Additionally, TEST_ID_OVRD must be used by external loads, because TEST_ID is required to be *EXT* in the message structure, in order to load self-reported scores).

When created, a batch consists of one or more import rows. These rows are stored in an Import Rows entity. When the Purge process deletes all of the rows of a batch, it will be an empty batch. Every batch has a Batch Status, which defines the current state of the batch and determines the processes that can be run on it. The following table shows the statuses in which a batch can exist:

State	Description
Active	The batch has at least one import row, and the Import or Purge process can be run on it.
Purged	The batch has no import rows, because all the rows have been purged (deleted by one or more runs of the Purge Process). The Import or Purge process cannot be run on this batch. A batch in this status is only stored for auditing/history reasons.
Import in Progress	The Import Process is currently being run on the batch. Another Import or Purge Process cannot be run on it.
Purge in Progress	The Purge Process is currently being run on the batch. Another Import or Purge Process cannot be run on it.

If a batch is created as a result of data received from a Campus Solutions Search/Match/Post run, then the following other information is also saved:

- CS Run Control ID.

- CS Loaded Date.

- Institution.

- Career.

These additional fields are not mandatory; they can be empty for batches created with data received from third-party sources

Each batch file has a Source value, that describes the origin of the prospect data. If the data is loaded from Campus Solutions, then the value *Campus Solutions* is stored in this field. If the data is loaded from an external source, the value *External* is stored in this field.

Import Rows

An import row is an individual prospect or suspect imported from a Campus Search Tape/Test Score load or from an external source. Import rows consists of a standard structure that stores bio/demo and recruiting status information for the individual, regardless of the suspect or prospect's origin (for example, SAT load, GRE load, spreadsheet, and so on).

An import row has Test Record number, a Test ID, and always belongs to one and only one batch. It contains the following types of data:

- Bio/Demo-related information: Name, Address, Phone, Email (and types), National ID, Sex, and so forth, along with EmplID (if available).

- Prospect information: Institution, Career, Recruiting Status, and so on.

- Other relevant information such as last school attended, ethnic group code, and so on.

Every row maintains a row status, which defines the current import processing status of the row. The following table shows the possible statuses:

Status	Description
Ready for Processing	The default initial state of an import row. This status instructs the import process to perform data validation for the row and run Search/Match before posting it to CDM.
Posted	The import row has been posted to CDM. The row can be purged.
Suspended	The import process (after running Search/Match) found this row to be a duplicate. The Administrator musts review and resolve it.
Add Person	Instructs the import process to create a new person. This status is set only after a review process after a row has been marked Suspended.

Status	Description
Update Person	Instructs the import process to update an existing person. This status is set only after a review process after a row has been marked Suspended.
Ignore	Instructs the import process to ignore the row. This row can be purged. This status is set only after a review process after a row has been marked Suspended.
Error	The row has encountered an error during the import process. The Administrator must review and resolve it.

After an import row is created, its row status can be changed automatically by the import process or manually by the Administrator.

Test Results

The Test Results entity stores test results for an import row. It includes Test ID, Test Record number Test Date, Test Component and Data Source.

Note. When Campus Solutions runs Search/Match/Post for SAT I, scores for both SAT I and SAT II type Test IDs are sent over. This means that SAT II scores are sent along with SAT I scores even if SAT II is not explicitly selected in the Search/Match/Post. When these scores arrive on the CRM side, they are all stored under the SAT I Test ID. For SAT II scores, the Test ID field in the Test Results Entity still contains SAT I, but the Test ID Override value is populated with SAT II. This is an indication to the import process to consider the Test Components (and other attributes) as belonging to SAT II (and not SAT I) when posting to the final CRM Test Scores tables.

Other Import Row Information

An import row also contains other entities that can store prospect Program/Plan/Sub Plan details, Academic Interests, and Extracurricular Activities.

Populating the Staging Area

This section describes the process for populating the staging area.

To define configuration mappings, use the Test Score to Results Configuration Mapping component. Use the RB_SM_CFG_MAP component interface to load data into the tables for this component.

Creating Batch and Import Rows

When an import occurs, an input message (a single message or multiple related messages) containing prospect and test score data is received by CRM as a result of a Campus Solutions Search/Match/Post run or from another external source. This message is parsed and processed in the CRM integration broker. The following steps occur:

- The incoming message first goes through a data validation step where the batch-level fields are validated. The following fields are verified if to see if they exist in CRM:

    - Test ID.

    - Institution.

    - Career.

    If this validation fails, no batch is created and the message is marked as an error (the message can be resubmitted after the errors have been corrected).

- If the validation succeeds, a new Batch ID is generated, and then a batch with this Batch ID is created in the staging area

    - If the batch is created as a result of a Campus Solutions message, then the Created By value is set to the Operator ID (OPRID) sent on the message, but if the batch created from an external source, then the Created By value is set to a System user.

    - If the batch is created as a result of a Campus Solutions message, then the batch Source is set to *Campus Solutions.* If the message originated from a third party, then the Source is set to *External.*

- Individual import rows are created for the batch rows. Test Record Numbers are not generated—they are part of the key structure of the message and must be generated by the entity that creates the XML Message (either Campus Solutions or the external loading code). Associated child records (Test Results, Prospect Program/Plan/Sub Plan, Academic Interests, and Extracurricular Activity information) are also created for each import row if they were provided on the incoming message.

- All import rows of the batch are defaulted to the Row Status of *Ready for Processing.* The Batch Status is then set to Active.

Messages From Search/Match/Post in CRM

When Search/Match/Post for a particular Test ID is run in Campus Solutions, it is done in context of a Run Control ID. You can also provide additional run control parameters (such as default prospect institution and career information). Every run of a Search/Match/Post (with the post to CRM option) results in suspect, prospect, and test score (if a test score exists for the person) data being messaged to CRM. When a new batch is created for this data in the CRM staging area, the following additional run control related information is also stored along with it:

- CS Run Control ID.

- CS Loaded Date.

- Institution.

- Career.

- Operator ID (OPRID), as Created By.

The HE Administrator can use this information as search criteria when querying for a batch (or set of batches) before running the Import or Purge processes.

Messages from External Sources

An external source can also send CRM a list of prospects/suspects conforming to the standard input message. In this case, each prospect in the message can potentially be associated with a different institution and career, so these fields are typically not populated for the batch that is created. Also, in the case of data from an external source, the CS Run Control ID and CS Loaded Date are empty. However, the Created By field is still set to a CRM system user.

Managing Import Batches

A batch is the "unit of work" on which the Import and Purge processes operate. You can run the Import or the Purge processes on an active batch at any time and as many times as needed.

To import, the Administrator identifies the batch or batches to be imported and runs the import process. Typically, not all import rows in the batch are posted the first time, because rows can fail due to errors (for example, data validation errors) or due to their being potential duplicates. The administrator resolves such rows and then reruns the import process on the batch. This process is continued until all rows are posted or marked as Ignored.

To purge, the administrator identifies the batch or batches to be purged and runs the purge process. The purge process deletes only the rows from the batch that are no longer needed (such as those that are already posted or marked Ignored). Thus, it cleans up the staging area of rows which are no longer to be processed by an import execution, thus improving import process performance. After they have been purged, rows are deleted and cannot be recovered.

Running the Import and Purge Processes

Access the Manage Import Batches page (Customers CRM, Prospective Student Import, Manage Import Batches).

Manage Import Batches

Search Results   Customize | Find | View All | 🔲 | 🎞 First ◀ 1-10 of 10 ▶ Last

Select	Batch ID	Test ID	Date/Time Created	Created By	Source	Batch Status	Total Count	Awaiting Import	Awaiting Purge
☐	22257	SAT I	02/18/2009 5:21AM	Stu Marx	Campus	Purged	0	0	0
☐	22238	SAT I	02/18/2009 5:21AM	Stu Marx	Campus	Active	20	0	17
☐	22237	SAT I	02/18/2009 5:21AM	Stu Marx	Campus	Active	20	0	19
☐	22236	SAT I	02/18/2009 4:35AM	Stu Marx	Campus	Active	20	20	0
☐	22235	SAT I	02/18/2009 3:40AM	Stu Marx	Campus	Active	20	20	0
☐	20006	ACT	02/04/2009 6:36AM	Stu Marx	Campus	Active	18	0	16
☐	20005	ACT	02/03/2009 10:32PM	Stu Marx	Campus	Active	18	18	0
☐	20004	ACT	02/03/2009 10:29PM	Stu Marx	Campus	Active	18	18	0
☐	20003	ACT	02/03/2009 10:27PM	Stu Marx	Campus	Active	18	18	0
☐	20002	ACT	02/03/2009 10:25PM	Stu Marx	Campus	Active	18	18	0

◀ ☐ Check All / Clear All   ▶

└ [Import]   [Purge]

Manage Import Batches page (1 of 2)

Manage Import Batches

Search Results   Customize | Find | View All | 🔲 | 🎞 First ◀ 1-10 of 10 ▶ Last

...ng ...ge	Posted	Ready for Processing	Suspended	Error	Ignore	Add Person	Update Person
0	0	0	0	0	0	0	0
17	17	0	0	3	0	0	0
19	19	0	0	1	0	0	0
0	0	0	20	0	0	0	0
0	0	0	20	0	0	0	0
16	16	0	0	2	0	0	0
0	0	0	18	0	0	0	0
0	0	0	18	0	0	0	0
0	0	0	18	0	0	0	0
0	0	0	18	0	0	0	0

◀ ☐ Check All / Clear All   ▶

└ [Import]   [Purge]

Manage Import Batches page (2 of 2)

To perform an import or purge process, you must first identify the batches. The Manage Import Batches page displays a search page where you can search for batches. Note that you must scroll to the right to see all of the information on the Manage Import Batches page.

Batch ID	Click the link to display details about the batch.
Test ID	The identifier for the test.
Date/Time Created	The full date and time when the batch was created.
Created By	The name of the person who created the batch.
Source	*Campus Solutions* or *External*.
Batch Status	The current status of the batch: *Active,Purged,Import in Progress,* or *Purge in Progress*.
Total Count	The total number of rows in the batch.
Awaiting Import	The sum of the number of rows in *Ready for Processing,Add Person,* and *Update Person* statuses.
Awaiting Purge	The sum of the number of rows in the *Posted* and *Ignore* statuses.
Posted	The number of rows in the *Posted* status.
Ready for Processing	The number of rows in the *Ready for Processing* status.
Suspended	The number of rows in the *Suspended* status.
Error	The number of rows in the *Error* status.
Ignore	The number of rows in the *Ignore* status.
Add Person	The number of rows in the *Add Person* status.
Update Person	The number of rows in the *Update Person* status.

Importing or Purging Multiple Batches

Access the Run Import/Purge page (click the Import or Purge button on the Manage Import Batches page).

Run Import/Purge page, Import selected

You can only import or purge batches that are in the *Active* status. If you want to import or purge more than one active batch, select the check box next to each desired batch, then click the Import or Purge button to go to the Run Import/Purge page. You can select all active batches by clicking Select All, or clear the selection by clicking Clear All.

The Run Import/Purge page acts as a confirmation page, displaying the list of batches you have selected. You can remove a batch from the list by clicking the trash can icon next to it, or click Cancel to go back to the search page.)

If you are performing an import, the Import Options section is displayed (this section is not displayed if you are performing a purge).

Generate Audience	Select this check box if you want to populate an audience as part of the import process.
Audience SetID	Select an audience Set ID to choose an audience name from that Set ID. The Audience SetID option is available only if the Generate Audience check box is selected.
Audience Name	Select an audience name from the specified SetID. This option is available only if the Generate Audience check box is selected. Only audiences of type *Internal using Import* in the *In Design* or *Designed* status are available for selection.

If you choose to generate an audience, when the import process executes, import rows (from all selected batches) that are posted are also appended to the existing list of the specified audience (after deduplication occurs). The audience itself is set to *Generated* status during the import process―you must manually set it back to the *In Design* or *Designed* status if you want it available to be selected again in another import.

After you have specified the options on the Run Import/Purge page, click OK to launch the process scheduler request page.

The Batch Component

Access the Import Batch page (click a batch link on the Manage Import Batches page).

Import Batch page

Batch Details	Displays the attributes of a batch that are common to batches created from Campus Solutions message data and those created from external sources.
Campus Run Parameters	Displays data that is specific to batches created from Campus Solutions message data. For batches created from eternal data, the fields in this section are empty. If the source is Campus Solutions, this section is expanded by default; if the source is external, it is collapsed.

Row Status Summary	This section shows the status summary of the import rows currently belonging to the batch. These counts are computed when the batch component is loaded only if the last process run on the batch ended abnormally. Otherwise, the values are loaded from the counts stored on the batch in the staging area.
	When a batch is first created, the Total Count value is equal to the total number of rows in the batch; all other statuses have a count of 0. If the batch is in *Purged* status, the counts for all statuses are set to 0.
	Each count in the Row Status Summary is linked if it is greater than 0. Clicking on the count link takes you to the Manage Import Rows search page and execute the appropriate search query. You can use these links as a quick way to view rows in a particular status.
Import Options	These options were described in the section on importing and purging multiple batches.

Note. If the *Higher Education* installation option is set on the CRM instance and you try to commit an audience that has the source *Internal using Import,* the system checks whether the audience has been populated from any of the import batches in the system. If it has, the system displays a warning that setting the audience to *Committed* will make it permanently unavailable for use in future import process runs. You can then choose whether you want to change the audience's status.

Click the Import or Purge button to perform the import or purge process. You cannot click a button if there is nothing to import or purge.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up General Options."

Viewing Import History

Access the Run History page (click the Run History tab on the Import Batch page).

The Run History tab shows a summary of all the import and purge process runs that have been performed on the batch. The default display order is reverse chronological order by the Start Time. A row appears on the grid after an import or purge is initiated, but you cannot view details about the process instance until the process has actually begun.

Note. This details on this page are refreshed each time you access it.

Run Type	This value is either *Import* or *Purge,* depending on the process run.
Run By	The name of the person who ran the process.
Start Date/Time	The date and time when the process was initiated.
End Date/Time	The date and time when the process completed.

Audience SetID	The SetID for the audience used in generation. This value can appear only for imports; the field is empty if the Run Type is *Purge.*
Audience Name	The audience to which the Import is added. This value can appear only for imports; the field is empty if the Run Type is *Purge.*
Rows Processed	For an import, the total count of the rows in *Ready for Processing, Add Person,* and *Update Person* statuses.
	For a purge, the total count of the rows in the *Posted* and *Ignore* statuses.
Run Status	The current status of the process.
Process Instance	The Process Instance ID (from the process scheduler). Click the link to view details of the process scheduler process.

Handling the Abnormal Termination of the Import or Purge Process

In rare instances, the import or the purge process run on a batch can abnormally end after processing only some rows of the batch. If this occurs, the batch can remain in a locked state (in the *Import in Progress* or *Purge in Progress* status); the row counts for the various statuses stored on the batch will not reflect the actual counts because the import or purge process should update them at the end of processing. If this occurs, you might think that the batch is being processed, where in fact the process instance for the import or purge process is dead.

To recover from this situation, the Batch component on load performs the following actions:

- If the batch is in *Import in Progress* or *Purge in Progress* status, check whether the Process Instance of the process last run on this batch is still running. This process instance information is obtained from the Batch History.

- If the Process Instance is not running, this means the process has ended abnormally. The system then does the following:

  - Updates the latest Row Status Summary counts on the batch (in the staging area) and sets the Batch Status to *Active.*

  - Displays a warning message informing you that the import or purge process that was last run on this batch terminated abnormally, the Row Status Summary shows the most current counts, and that you should rerun the import or purge process.

Setting Up the Import Process

Access the Prospect Import Mapping page (Set Up CRM, Utilities, Search/Match, Prospect Import Mapping).

Prospect Import Mapping

*Test ID	Description	*Configuration ID	Configuration Description		
ACT	ACT Assessment	RB_CIMPORT	Prospect Data Importer	+	−
ADA	American Dental Association	RB_CIMPORT	Prospect Data Importer	+	−
AP	Advanced Placement	RB_CIMPORT	Prospect Data Importer	+	−
APS	Search Advanced Placement	RB_CIMPORT	Prospect Data Importer	+	−
CLEP	College Level Examination Prg	RB_CIMPORT	Prospect Data Importer	+	−

Prospect Import Mapping page

The import process run for a batch invokes the Search/Match API with a particular Result Action Configuration ID. The Configuration ID used for a batch depends on which Test ID the batch belongs to. The Prospect Import Mapping page maps Test IDs to Configuration IDs. A Test ID cannot be mapped to multiple Configuration IDs, but the same Configuration ID can be used for several Test IDs.

See and

Understanding the Import Process

The goal of the import process is to move import row data (bio/demo, prospect, test scores, program/plan/sub plan, academic interests and extracurricular activities) belonging to a batch from the staging area to CDM and profile tables. This is called *posting.* The import process performs the following activities:

- Extract import rows (and their child data) from the staging area, provided that they are in the *Ready for Processing,Add Person,* or *Update Person* status.

- Validate the data.

- Transform the data to the format required by CDM.

- Run Search/Match logic on the data to identify duplicates.

- Write the transformed data to CDM:

  - Create new Consumers along with their contact methods, test results, and lifecycle information.

  - Update existing persons, adding consumer information if needed, and adding or updating their contact information, test results, and lifecycle information.

- Append data from import rows to the member list of an existing audience, if this option is specified at the time of import.

- Update the Row Status of each import row processed.

The illustration below is the functional flow diagram of the import process.
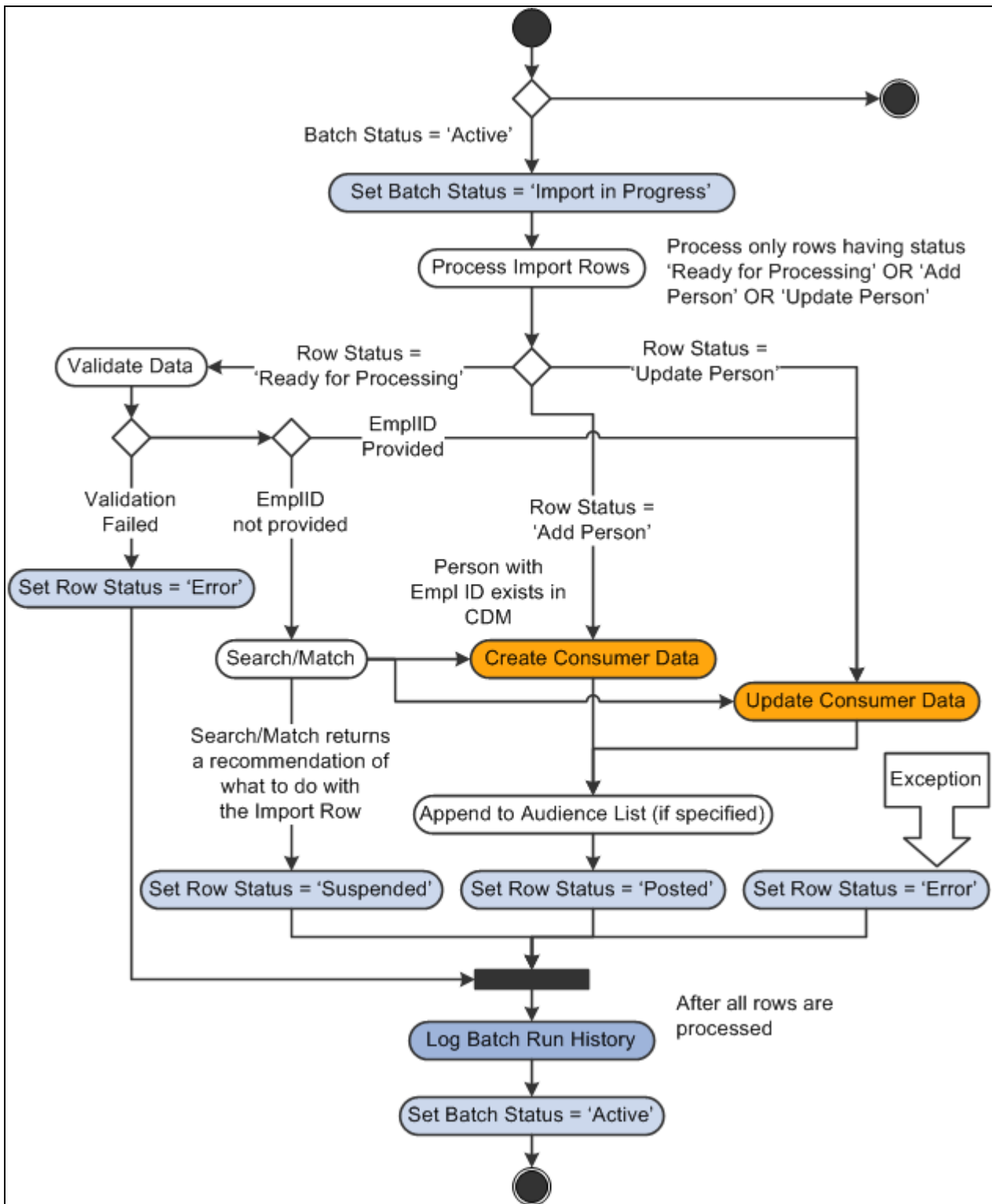
Import Process

The process performs the following steps:

1. Ensure that the batch being imported is Active and set it to *Import in Progress* status. This ensures that no other import or purge process runs can occur on this batch. Clear any error messages logged for the batch due to a previous import process run.

2. Process only import rows in the batch that have the Row Status of *Ready for Processing,Add Person,* or *Update Person.* Each row must processed independently of the others (that is, the status of one row—for example, if an error occurs—should not affect the processing of other rows).

3. For rows that are in the *Ready for Processing* status:

   • Run all data validations on the row. If a data validation fails on a row, then set it to *Error* status and display the appropriate error message. Continue performing all other data validations that could lead to more error messages to be logged for the same row, in order to gather as many errors for the row as possible at each run. This allows the administrator to resolve all of them before the next run.

   • Check if EmplID is available on a row.

   If EmplID is not available, invoke Search/Match logic to check for potential duplicates. Based on the results provided by Search/Match, perform one of the following operations and set the row status as indicated.

Action	*Row Status*
Create a new Consumer	Posted
Update an existing person	Posted
No action	Error

   If EmplID is available, this means that the imported individual already exists as a Person in CDM and there is no need to call Search/Match. In this case, the system updates the existing person with the matching EmplID and then sets the row to *Posted* status.

4. For rows that are in the *Add Person* status, add a new Consumer to the system and then set the row to *Posted* status.

5. For rows that are in the *Update Person* status, update the person specified on the import row and then set the row to *Posted* status

6. For rows that are in the *Add Person* or *Update Person* statuses, if an audience is specified in the import options then append this consumer to the member list of the audience.

7. If any exceptions occur during the processing, set the rows to *Error* status and display the appropriate error message. Note that import processing does not stop because a row encounters an error. The other rows are still processed.

8. After all rows are processed, log a run history row for the batch.

9. Set the batch status back to *Active.*

Data Validation at the Import Row Level

Every import row (and its associated child records) first goes through a data validation process. If one of the data validations fails for a row, the row is marked as Error and an error message is logged along with it. However, the processing of the row is not aborted immediately after a data validation failure. Other data validations can still be performed and more errors logged on the same row before processing of the row is aborted. This is so that as many data validation errors as possible for the row can be collected and displayed on the row, and the administrator can handle all of them before the next run.

The following validations are performed:

- Ensure that entries for control-type fields specified on the import rows exist in control tables synced to CRM from Campus Solutions. This ensures that invalid values are not sent for these fields. For example, a batch is to be imported and the Test ID field in the batches entity has a value of *SAT I,* then a validation step ensures that *SAT I* exists in the Test control table. The following control field type data in the staging area is validated against control tables:

Staging Area Entity	*Field*
Import Rows	Test ID
Import Rows	Institution
Import Rows	Career
Prospect Program/Plan/Sub Plan	Program
Prospect Program/Plan/Sub Plan	Plan
Prospect Program/Plan/Sub Plan	Sub Plan
Import Rows	Admit Type
Import Rows	Admit Term
Import Rows	Academic Level
Import Rows	Referral Source
Test Results	Test Component
Test Results	Test Data Source
Test Results	Test ID Override
Import Rows	Last School Attended
Import Rows	Housing Interest
Import Rows	Campus

- Ensure that each of the following fields have valid values.

Staging Area Entity	Field
Import Rows	Recruiting Status is one of the following values: *Prospect,Suspect,Inquiry, Applicant*
Import Rows	National ID Type
Import Rows	Primary NID
Import Rows	Marital Status
Import Rows	Recruitment Status
Prospect Extracurricular Activities	Extracurricular - Internal/External
Prospect Academic Interests	Academic Interests - Priority

- Ensure that the EmplID provided (in the Import Rows entity) exists in CRM. If it does not, this means that Person Basic Sync has not occurred or it has failed.

- Ensure that the Academic Information conforms to the Academic Information hierarchy synced from Campus Solutions. This error does not occur if the data source is Campus Solutions.

- Ensure that a Test Score (in the Test Results entity) is in the valid range of the Test Component for that Test ID. Valid ranges are sent over via EIP from Campus Solutions. This validation is omitted if the Source is Campus Solutions.

Calling the Search/Match API

Because the import process creates new persons (Consumers), it is necessary to ensure that a person being created already does not exist in CDM. The Search/Match API facilitates duplicate identification and thus discourages the introduction of duplicates. The Search/Match is run on the bio-demo portion of every row by invoking the Search/Match API. The Result Action Configuration ID mapped to the Test ID are passed to the API, along with bio-demo information. The results of the Search/Match API indicate to the import process whether the individual on the row already exists in CDM as a duplicate and what is to be done with the import row:

- *Add*: Create a new consumer and its associated data.

- *Update*: Update an existing person (specified by the Search/Match API result) and its associated data.

- *Suspend*: Do not do anything with the row and let the administrator decide how to resolve it.

See and <u>Chapter 2, "Recruiting Students," Using the Search/Match Capability, page 43.</u>

Creating Consumer Data

If prospect data is received for a person who is not already a Consumer and who does not exist in CDM as determined by Search/Match, then a new Consumer (person with the Consumer role) is created in the default SetID for inbound EIPs. This default SetID is specified in Set Up CRM, Common Definitions, Customer, Customer Installation Options. Associated data, such as academic information, test scores, and so on, is then created for the person.

The following fields are used and rules are followed when creating consumer data in CDM:

- *Name related fields*: The Last Name, First Name, Middle Name, Name Suffix, and Name Prefix fields from the import row.

- *Person related fields*: The Sex, Birth Date, and Marital Status fields from the import row.

- *National Identification (NID) related fields*: The National ID Type, National ID, and Primary NID fields from the import row. Note that the NID row created is required to be set to Primary even if the Primary NID value is *N.* This is because no other NID rows exist for the person at this time. The country is always *USA.* Note also that if the source is Campus Solutions, the Primary NID field is not sent, because it is always set to *Y.*

- *Other fields*: The Ethnic Group Code, Ethnic Group Set ID, Citizenship Status, Religious Preference, and Regulatory Region fields from the import row.

- *Contact Methods*: An import row can only have up to one address, one email and one phone specified. The system uses this information to create the create Address, Email and Phone type contact methods for the Consumer role. The Address Type, Email Type and Phone Type fields are used to derive the Contact Method Purpose Types for the Contact Methods.

   The Address Type, Address1, Address2, Address3, City, State, Country, and Postal import row fields are used to create the Address contact method. The effective date is set to the current system date, with no end date.

   The Phone and Phone Type import row fields are used to make up the Phone contact method. The effective date is set to the current system date, with no end date.

   The Email Address and Email Address Type import row fields are used to make up the Email contact method. The effective date is set to the current system date, with no end date.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up General Options."

Creating Academic Information

The following fields are used and rules are followed when creating academic information data in CDM:

- *Institution and Career*: The Institution, Career, Admit Type, Admit Term, Campus, Recruiting Status, Academic Level, Housing Interest, Financial Aid Interest, and Referral Source import row fields.

- *Last School Info*: The Last School Attended and Graduation Date import row fields.

- *Academic Program*: The Program, Recruiting Status (which becomes the Lifecycle status), and Campus import fields. The Creation Date is set to the current system date. Note that if Recruiting Status values of *Inquiry* or *Applicant* are sent by Campus Solutions, the corresponding Lifecycle Status in CRM is set to *Prospect.*

- *Academic Plan and Sub Plan*: The Plan and SubPlan import row fields.

Creating Test Score Information

Test Score rows for a person are created in CDM from the Test Results entity tied to the import row. If the Test ID Override field has a value (that is, it is not empty), then create Test Scores for this Test ID.

Note. Note that if you create an external import (that is, not through Campus Solutions), you must create the message. The Test ID for the message must be *EXT*. If you have gathered self-reported test scores (test scores that did not come from load media from a confirmed organization through the Campus Search/Match/Post), you should use the TEST_ID_OVRD (Test ID Override) to populate the correct TEST_ID that you want to report.

Creating Extracurricular Activities Information

Extracurricular activities for a person are created in the Customer Profile Table for Extracurricular Activities from the Prospect Extracurricular Activities entity tied to the import row. The Start Date is set to the current system date.

Note. Not all fields in the Profile Table are received on the Campus Solutions message. Those that are not received are left empty.

Creating Academic Interests Information

Academic interests for a person are created in the Customer Profile Table for Academic Interests from the Prospect Academic Interests entity tied to the import row. The Effective Date is set to the current system date.

Updating Consumer Data

If prospect data is received for a person who already exists in CDM, then a new person is not created. However, if the person exists but does not belong to the Consumer role, then that role is added to it. Inserts or updates are made to the person's bio-demo data (name, address, and so on) and its associated information (academic info, test scores, and so on). The following table illustrates the rules that are followed for updates.

Information to be Updated	*Rules*
Name related fields	Name related fields in CDM are never updated (even if empty). Also, no new Name entry is created. In other words, name related fields are never touched as part of updating consumer information.
Person related fields	The CDM fields corresponding to the Sex and Birth Date import row fields are updated only if previously empty. The CDM field corresponding to the Marital Status import row is never updated (even if empty).

Information to be Updated	Rules
NID related fields	If National ID with NID Type already exist on the import row for the Person, it is not updated. Otherwise, an NID row is inserted from the National ID Type, National ID, and Primary NID import row fields. **Note.** If the Source is Campus Solutions, the Primary NID value is not sent because it is always set to *Y.* In this case, the newly created NID row is designated primary (and the current primary row is made non-primary).
Contact methods	If Address Type on the import row matches with an existing, active Address of same contact method Purpose Type as the Consumer, the person's address is not updated. Otherwise, a new Address contact method of that type is added for the person's Consumer role, effective as of the current system date (no end date). If Phone Type on the import row matches with an existing, active Phone of same contact method Purpose Type as the Consumer, the person's phone information is not updated. Otherwise, a new Phone contact method of that type is created for the person's Consumer role, effective as of the current system date (no end date). This created contact method is not set to Primary unless there is no other Phone contact method for the Consumer If Email Type on the import row matches with an existing, active Email of same contact method Purpose Type as the Consumer, then the email information is not updated. Otherwise, a new Email contact method of that type is created for the person's Consumer role, effective as of the current system date (no end date). This created contact method is not to Primary unless there is no other Email contact method for the Consumer. The Address Book entries (ABEs) are rebuilt.

Updating Academic Information

The following table shows the rules for updating academic information.

Information to be Updated	*Rules*
Institution and Career	If the Institution/Career combination available on the import row does not exist for the person in CDM, that combination is inserted and the Career Detail fields are created from the following import row fields: • Institution • Career • Admit Type • Admit Term • Campus • Recruiting Status • Academic Level • Housing Interest • Financial Aid Interest • Referral Source If the Institution/Career combination already exists, the Housing Interest and Financial Aid Interest Career Detail fields from the import row are updated only if they are empty. The Recruiting Status field is updated if it is empty or if it is set to a more advanced status than currently exists on the row (for example, if the current status in CDM is *Suspect,* and the import row is set to *Prospect,* then the field is updated). Note that if the value *Applicant* or *Inquiry* is received on the Recruiting Status field, it is interpreted as the *Prospect* status. No other fields are updated, even if they are empty.
Last School and Graduation Date	The Last School Attended and Graduation Date fields from the import row are created for the person in CDM only if they do not already exist in CDM. If they already exist, they are not updated.
Academic Program	If Academic Program on a Prospect Program/Plan/Subplan entity row of the import row does not exist for person in CDM, then the Program is inserted for the person's Institution/Career combination. For each Program, Program level fields are created using the Recruiting Status (which becomes Lifecycle Status) and Campus fields. The Creation Date value is set to the current System Date. If the Academic Program already exists, then the Recruiting Status is updated only if it is empty or if it is of a more advanced status than the status currently on the row (for example, if the current status in CDM is *Suspect,* and the import row status is *Prospect,* then it is updated. Note that if the value *Applicant* or *Inquiry* is received on the Recruiting Status field, it is interpreted as the *Prospect* status. The Campus field is not updated even if it is empty.

Information to be Updated	Rules
Academic Plan and Sub Plan	If the Academic Plan/Sub Plan combination that is available on the Prospect Program/Plan/Subplan entity import row does not exist for the person in CDM, the Plan/SubPlan combination for the person's Institution/Career/Program is inserted.
	If the Academic Plan/Sub Plan combination already exists, nothing is updated.

Updating Test Scores

Each Test Result tied to an import row is matched with the Test ID, Test Component, Test Date, and Data Source of the person's CDM Test Scores tables.

If no match is found, a Test Result row is inserted for the person in CDM.

If a match is found, the CDM tables for the person are updated with the Test Result row data, provided that the REV_SCORE_IND flag (Revised Score Indicator flag) has the value of *U* on the Import Row. If this value is set to *N,* then no update occurs. If it is set to *C,* then update only if the score on the import row is greater than that in CDM.

Note. If the Test ID Override field has a value (that is, it is not empty) then this value is used to perform match and insert/update Test Scores for this Test ID.

Updating Extracurricular Activities

For every extracurricular activity associated with the import row (for example, the Prospect Extracurricular Activities entity), the system determines whether it matches an extracurricular activity for the person in the Customer Profile Table for the same Institution and Career (from the import row entity), Internal/External Flag and Start Date (current date). If such a match does not exist, that extracurricular activity is inserted.

Updating Academic Interests

For every academic interest associated with the import row (for example, the Prospect Academic Interests entity), the system determines whether it matches an External Subject Area for the person for the same Academic Career (from the import row) and Effective Date (current date) in the Custom Profile Table for Academic Interests. If such a match does not exist, that is inserted with the current date as the effective date.

The BO_ID of the updated person (Consumer) is saved on the import row.

Errors

Any row level errors encountered during import processing are stored on the row, so that the Administrator can review and resolve them later. Errors can arise in various stages of processing:

*   Data validation errors.

*   Errors returned by the Search/Match API.

*   Errors while building an audience.

*   Errors returned by the CDM.

Understanding the Purge Process

The purge process permanently deletes import rows (and the child rows) of a batch from the staging area, provided that they are in the *Posted* or *Ignore* status. The purge process cleans up rows that are no longer needed, thus saving storage space and improving the performance of the import process.

The following diagram shows the logical flow of the purge process.
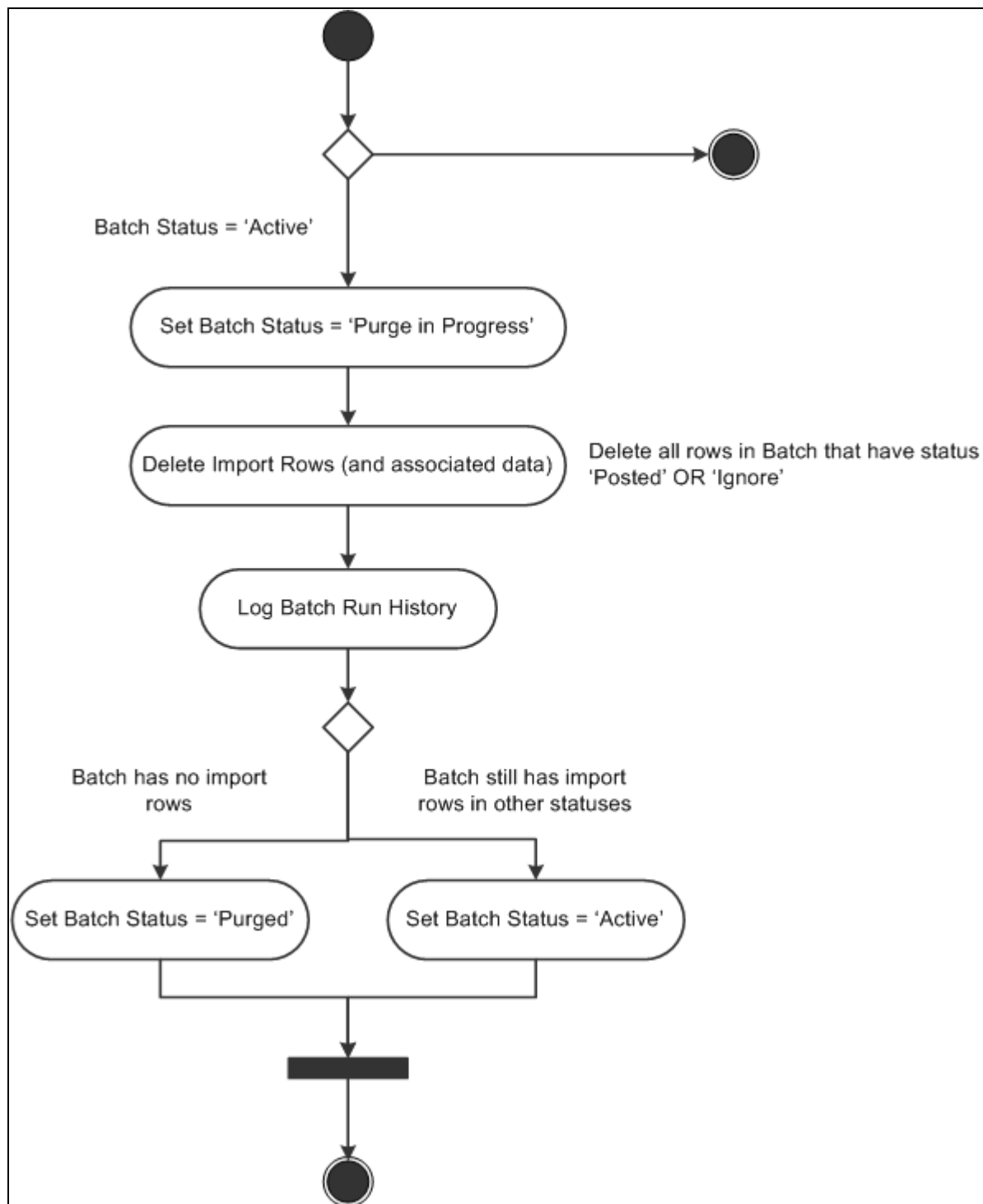
Purge process flow

The process performs the following steps:

1. Ensures that the batch being purged is *Active* and sets it to the *Purge in Progress* status. This ensures no other runs of the import or purge process will affect this batch.

2. Deletes all the import rows belonging to the batch provided that they have the *Posted* or *Ignore* status. This includes all the associated child records of each import row.

3. Logs a run history row for the batch.

4. If the batch has no rows left after the deletion of import rows, sets the Batch Status to *Purged*. This ensures that this batch can no longer be imported or purged. Otherwise, it sets the Batch Status back to *Active*.

Managing Import Rows

Access the Manage Import Rows page (Customers CRM, Prospective Student Import, Manage Import Rows).

Manage Import Rows search page

Manage Import Rows search results page

Managing an import row primarily means reviewing its data and changing its status as needed, so that the import or purge process can process it in its next run. Updates to import rows (and their associated child data) are not allowed.

Note that updating a row status does not instantly run the import or purge process—it simply saves the updated status in the staging area.

To manage import rows, you use the Manage Import Rows component. This displays a Configurable Search screen that allows the Administrator to search for import rows using various search criteria.

Search results are rows from the Import Rows entity in the staging area that match the search criteria. Note that associated child rows like Test Results, Academic Interests, and so on are not displayed. The Search Result fields are separated into different tabs based on their categorization. Each field is read-only and displayed as stored in the Import Rows entity (no lookups, transformations or translations are performed).

Mass Update of Row Statuses

In certain cases, the HE Administrator might want to perform a mass update of certain rows' statuses of certain rows. (for example, change all *Error* rows to *Ready for Processing* after the errors have been fixed, or change all rows that are in *Ready for Processing* status to *Ignore.*

You do this by using the Reset,Ignore,Suspend, and Add buttons at the bottom of the configurable search results. If one or more import rows are selected (by selecting the check boxes for each row or by using the Check All/Clear All link) and one of the buttons is clicked, then the system attempts to change the status of all the selected rows to the new status indicated by the button you clicked. The following table shows the status to which the selected rows are changed based on the button clicked:

Button	Status Change
Reset	Ready for Processing

Button	Status Change
Ignore	Ignore
Suspend	Suspended
Add	Add Person

Only those rows that can be changed to the selected status are changed. If any rows cannot be changed, a warning message displays to inform you of the number of rows that were not changed.

For example, assume three rows in the following statuses: *Ready for Processing,Suspended* and *Ignore.* If the Add button is clicked, a warning message displays informing you that two rows could not be updated to the Add Person status. Selecting OK changes the status of Row 2 *(Suspended)* to *Add Person* and its Select check box is cleared. Rows 1 and 3 *(Ready for Processing* and *Ignore)* retain their original statuses, and their Select check boxes remain selected.

Click Save on the toolbar to commit the changes you have made.

Note. Update is not available as a mass action because a row cannot be changed to the *Update Person* status unless the person (Consumer) to be updated is known. Hence, this action can only be performed after reviewing one import row at a time.

Reviewing Import Rows One at a Time

Click the Record Number link of any of the search results to display the Manage Import Rows page.

Manage Import Rows page

This page allows you to review one import row at a time. The content and the action buttons displayed on this page depend on the current status of the import row. The toolbar and the Import Row Summary group box are common to all statuses; other sections and action buttons are as shown in the following table.

Import Row Status	Sections Displayed	Buttons Enabled	Buttons Disabled
Suspended	• Toolbar • Grid: "Select an existing person to update with import row." • Import Row Summary • Search/Match Result	• Update • Add • Ignore • Reset	Suspend

Import Row Status	Sections Displayed	Buttons Enabled	Buttons Disabled
Add Person	• Toolbar • Grid: "Select an existing person to update with import row." • Import Row Summary • Search/Match Result	• Update • Suspend • Ignore • Reset	Add
Update Person	• Toolbar • Grid: "Select an existing person to update with import row." • Import Row Summary • Search/Match Result	• Add • Update • Suspend • Ignore • Reset	None
Error	• Toolbar • Grid - Errors • Import Row Summary	• Ignore • Reset	• Add • Suspend
Ignore	• Toolbar • Import Row Summary	Reset	• Ignore • Add • Suspend
Posted	• Toolbar • Import Row Summary	None	• Ignore • Add • Suspend • Reset
Ready for Processing	• Toolbar • Import Row Summary	Ignore	• Add • Suspend • Reset

Toolbar	The toolbar summary shows the Batch ID, Test ID, Record Number and Import Row Status of the import row. You can use the Previous and Next links to move backward and forward. The Return to Search button takes the user back to the Manage Import Rows search screen.
"Select an existing person to update with import row" grid	Shows the potential duplicates as returned by the Search/Match API, which is executed when this page is displayed for the *Suspended,Add Person,* and *Update Person* statuses. If the Update button is enabled, selecting Update immediately changes the status of the import row to *Update Person.* The page is redisplayed for the new *Update Person* status.
	Note. The address displayed on the duplicates grid for each person is the primary address at the role level (in the following order: Consumer, Worker, Contact, Person). The National ID displayed is the person's Primary NID.
Import Row Summary	Displays a summary of import row information. This section appears for all statuses; action buttons are enabled or disabled depending on the status of the import row. Select an enabled action button to immediately change the status of the import row and redisplay the page for the new status.
Search/Match Results	This collapsible section appears only for the *Suspended,Add Person,* and *Update Person* statuses. It displays information returned by the Search/Match API invoked for the import row. The first row of the grid is arbitrarily selected if the row is in *Suspended* or *Add Person* status; if the row is in *Update Person* status, then the previously selected row continues to be selected.
Errors	This grid is displayed only if the import row is in *Error* status. It shows the complete list of errors for the row from previous import runs. Also it shows the process instance number and the date and time of the run corresponding to each error.

Using the Search/Match Capability

To ensure that duplicate constituents are not imported from Student Administration (SA) to CRM (that is, that constituents that already exist in the CRM database are not imported again from SA), the Search/Match feature checks for such duplicates when imports occur. Additionally, when a new constituent is created either in SA or CRM, Search/Match checks for duplicates and can bring over any additional data (such as test scores) to the SA system from CRM system.

Understanding Search/Match

Regardless of the application that calls it (for example, a PeopleSoft application program, an online PeopleSoft application component, or a web service), the Search/Match functionality performs duplicate checking for imported person data.

- The Search/Match is performed against CRM Persons regardless of role. Other search types (Organization and Company) are not supported.

- You can create and maintain Search/Match rules and parameters according to your organization's requirements.

- Standalone Search/Match test functionality is included, allowing you to perform search/match duplicate checking and view the results so that you can determine that your rules and parameters are functioning as expected.

- A set of Search/Match APIs to perform duplicate checking of the input constituent or prospect data against CRM Person data regardless of the role and based on the functional need of different calling applications such as an application engine program, an online PeopleSoft transactional component, the PeopleSoft CRM Search/Match test functionality, or a web service. The Search/Match rules can be different for Campus Solutions and for CRM. For example, the CRM Search/Match rules might be less restrictive than the Campus Solutions Search/Match logic.

Setting Up Search/Match

This section describes how to set up Search/Match.

Pages Used to Set Up Search/Match

Page Name	Definition Name	Navigation	Usage
Search/Match Rule	HCR_SM_RULE	Set Up CRM, Utilities, Search/Match, Define Rules	Define sets of fields to search for, and identify search criteria to use for searching.
Search/Match Parameters	HCR_SM_PARM	Set Up CRM, Utilities, Search/Match, Define Parameters	Combine and order search rules prior to performing a search to determine the search fields that are permitted for the search.
Search/Match – Test Harness	SEARCH_MATCH	Set Up CRM, Utilities, Search/Match, Test Harness	Perform ad hoc duplicate checking of the test input data entered in the search criteria fields.
Result Action Configuration	RB_SM_CONFIG	Set Up CRM, Utilities, Search/Match, Result Action Configuration	Specify actions for the system to take for imported records.
Prospect Import Mapping	RB_SM_CFG_MAP	Set Up CRM, Utilities, Search/Match, Prospect Import Mapping	Associates a Result Action Configuration with a test.

Defining Search Match Rules

Access the Search/Match Rule page (Set Up CRM, Utilities, Search/Match, Define Rules).

Search/Match Rule page

Search Rule Code	A unique identifier for the search.
Search Type	The type of business object for which this search is performed. Only the Person type is currently supported.
Description	A brief description of the search rule.
Sequence	The order of field appearance inside a search parameter.
Search Field	The field to be assigned to this search rule code. When the user tabs out, the associated field description is automatically populated in the Field Description field.
	Note. The search fields are delivered as system data, and you should not modify them.
Field Description	A brief description of the search field.
Required	Select this check box to make the value for the search field required for use in the search rule. If the check box is not selected, blank or nonexistent data is permitted in the field.

Usage	The criteria for evaluating the field. The following options are available:

- *Begins With*: The value must begin with this data. Default start position is 1; this cannot be modified. Only character-based data is allowed.

- *Contains*: The value must contain this data, either preceded by or followed by other data. The default starting position is 1, and only character-based data is allowed.

- *Equals*: The value must exactly match the data.

- *Not Used*: Do not use this field in the search. If this option is selected, it takes precedence over the Required validation and the field is not included in the duplicate checking criteria.

Start Position	The starting position where character comparison is to start (this value is read-only unless the Usage value is *Contains*).
Number of Characters	The number of characters from the start position to include in the comparison.
Length	The number of characters in the search field. When the user tabs out of the search field after specifying a field, the system automatically displays the total number of characters associated with the selected search field.

Defining Parameters

Access the Search/Match Parameters page (Set Up CRM, Utilities, Search/Match, Define Parameters).

Search/Match Parameters page

Search Parameter	The name of the search parameter.
Search Type	The type of business object for which this search is performed. Only the Person type is currently supported.
Description	A brief description of the search parameter.
Status	Select *Active* or *Inactive* from the list.
Search Order	The order in which to apply the search rule codes for this search parameter. The most restrictive search rule should be ordered lowest and least restrictive ordered highest.
Search Rule Code	The search rule code to be used in the search. When the user tabs out of this field after selecting a rule code, the Rule Code Description is automatically populated.
Description	A brief description of the search rule code.
View Definition	Click the link to navigate to the Search/Match Rules Codes Setup page where you can view or edit the rule definition.
Save	Click this button to save the Search/Match parameter. At this point, new Search/Match rules are added to and deleted rules are removed from the corresponding Result Action Configuration.

Using the Search/Match Test Harness

Access the Search/Match – Test Harness page (Set Up CRM, Utilities, Search/Match, Test Harness).

Search/Match Test Harness page (1 of 2)

Search/Match Test Harness page – (2 of 2)

This standalone page allows you to perform ad hoc duplicate checking of the test input data entered in the search criteria fields. With it, you can quickly find any duplicates for the data of interest and validate that the Search/Match functionality is working correctly.

Search Criteria	The Search Criteria are delivered as system data; you should not modify them.
Search	Click this button perform standard duplicate checking based on the selected search parameter. The search checks duplicates based on the order of its configured search rules from the most restrictive to the least restrictive.
Search by Order Number	Initially, this section is empty because no Search/Match parameter has been specified. After the user selects a Search/Match parameter, its corresponding Search Rule codes are displayed.
View Definition	Click this link to view the details of the specific search/match rule for that row.

Selective Search   Click this button next to its corresponding Search Rule order if you want
                                        the Test Harness to find duplicates satisfying only the criteria defined in the
                                        selected Search Rule. If you click Selective Search and not enough required
                                        fields are populated to carry out the specific rule, then an error message is
                                        displayed.

The results page displays the following information:

Search Order Number   The order number of the Search/Match Rule that found duplicate records in
                                        the CRM database. For a standard search, this is the first instance of the
                                        search/match rule that found duplicates based on the order of the most
                                        restrictive to the least restrictive based on the configuration of the search
                                        parameter. For a selective search, it is the corresponding user-selected
                                        search order.

Rule Code   This value corresponds to the Search Order Number in the original search
                                        as listed in the Search By Order Number section.

Total Count   The total number of duplicate matches found.

Person Details   A summary of the person information for the matched person.

Person ID   Click this link to view more detailed information about the person.

Defining Result Action Configuration

Access the Result Action Configuration page (Set Up CRM, Utilities, Search/Match, Result Action
Configuration)

Result Action Configuration page

The Result Action Configuration page defines the actions you want the system to take regarding imported records, based on specified parameters.

Rule Code	Indicates the order in which the parameters are processed, from lowest number (most restrictive) to highest (least restrictive).
Description	A description of the parameter.
One Match Action	Select the action for the system to take if one match is found for the imported person. Typically this is *Update.*
Multiple Matches	Select the action for the system to take if multiple matches are found for the imported person. Typically this is *Suspend,* so the administrator can review the records manually and determine the action to take.
No Match Found	Select *Add* if you want to add the person to the database if no matches are found, or select *Suspend* to place the person in the Suspended state so that an Administrator must review the record and decide on an action.

Setting Up Prospect Import Mapping

Access the Prospect Import Mapping page (Set Up CRM, Utilities, Search/Match, Prospect Import Mapping).

Prospect Import Mapping page

The Prospect Import Mapping page associates a Result Action Configuration with a test, to determine what is done with imported records.

Test ID	The identifier for the test.
Description	A brief description of the test.
Configuration ID	The configuration ID designated to specify what is to be done with imported records in the case of duplicates. The configuration ID is defined on the Result Action Configuration page.
Configuration Description	A brief description of the configuration.

Manually Creating Suspects and Prospects

With the integration of CRM 9.1 and Campus Solutions 9.0, prospective students are created in CRM instead of being created in Campus Solutions. This allows the Campus Solutions database to be kept clean of suspects and prospects who do not end up becoming applicants.

You can manually create and maintain suspects and prospects directly in CRM for Higher Education rather than having to create them in Campus Solutions and push them across. The career, program or plan, school, and test score information can now be maintained for a prospective student.

The Academics component is the place where a constituent's academic lifecycle information is stored for marketing and recruiting purposes. You can access the Academics component directly from the main menu, or from the Toolbars of the Person (Consumer) and Constituent 360-Degree View pages.

A constituent's Academic Information is keyed by Institution and Career. This means that for a given institution, a constituent can have one set of academic information for one career and a different set of academic information for a different career. For example, an existing undergraduate student in an institution could be created as a prospect for a graduate level career.

Pages Used to Manually Create Suspects and Prospects

Page Name	Definition Name	Navigation	Usage
Person (Consumer)	RD_PRSN_PRIMARY	Customers CRM, Search Person or Customers CRM, Add Person	View information about a constituent.
Academics – Career	RD_ACAD_CAREER	Click the Career tab on the Academics page.	Displays information about the constituent's academic career.
Academics – Program and Plan	RD_ACAD_PROGRAM	Click the Program and Plan tab on the Academics page.	Displays information about the constituent's academic program, plan, and subplan.
Academics – Last School	RD_ACAD_SCHOOL	Click the Last School tab on the Academics page.	Displays information about the last school the constituent attended.
Test Scores	RD_SCORES	Customers CRM, Academics, Test Scores or Click the Test Scores button on the Person (Consumer) page toolbar.	Displays information about the constituent's self-reported and official test scores.

Viewing Personal Information

Access the Person (Consumer) page (Customers CRM, Search Person).

Person (Consumer) page (partial view)

Person Information section	Use this section to enter biographical information about the constituent (such as name, birth date, gender, and so forth).
Contact Info Entries section	You can enter multiple types of postal addresses, phone numbers, and email addresses in this section. For each contact method, if multiple entries exist then one of the entries is selected as primary.
Toolbar	Two Higher Education specific links are available in the Toolbar: Academics and Test Scores. Note that these two links are displayed only if the Higher Education installation option has been enabled. Clicking the Academics link takes you to the Academics component, while clicking the Test Scores link transfers you to the Test Scores component of the constituent.

Defining Academic Career Details

Access the Academics – Career page (Customers CRM, Academic Information, Academics).

Academics – Career page

The Career tab displays recruiting information associated with a Suspect or Prospect.

After a suspect or prospect's information is saved on this page, the Name, Institution, and Career fields become read-only.

Prompts are secured by user. The security is defined in Campus Solutions and the information is synchronized using EIPs.

Admit Type	Select the prospect's admit type for this career (for example, *First Year*).
Admit Term	Select the admit term for the prospect's career (for example, *2008 Fall*).
	The value in this field is used in the *Recruiting Performance* Fusion Intelligence reports off of the *CSW: Recruiting & Admissions* Interactive Dashboard.
Campus	Enter a specific campus with which to associate the prospect. Campuses are defined on the Campus Table page in Student Administration.

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 whom you suspect is interested in your institution). Conversely, you might consider a person who sends a prospect card a prospect (someone whom you know is interested in your institution).

Note. Recruiting status exists only in CRM, and is never updated on the Campus Solutions side.

Academic Load   Select the appropriate academic load for this career (for example, *Full Time* or *Part Time*).

Academic Level   Select the academic level for this career (for example, *Freshman* or *Post-Bacc*).

Housing   Select the housing interest that the person indicated. Values for this field are delivered with your system as translate values that you can modify. Delivered values are *(none),Commuter,Off Campus,* and *On Campus.* This field is for informational purposes only.

Financial Aid Interest   Select to indicate that this prospect has an interest in financial assistance. This field is for informational purposes only.

Referral Source   Enter the appropriate referral source for this prospect. A referral source indicates how this person became a prospect, and is a high level indicator of how your institution came into contact with the person. Example referral sources include Drop-In, Campus Event, or College Fair.

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 the record was added.

Sponsored By   If this constituent is sponsored by a company , then enter the Company here. Only one sponsored company per constituent per career is currently supported (if a constituent has more than one career, he or she can have more than one sponsor). If the company does not exist in the system, you can use Quick Create to add its information.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, "Introducing Customer Relationship Management for Higher Education"

PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook

Defining the Academic Program and Plan

Access the Academics – Program and Plan page (click the Program and Plan tab).

Academics – Program and Plan page

This tab displays all of the academic program , plan and subplan information, along with the lifecycle status of each program for the constituent , institution, and career.

Program	Enter an academic program such as Arts or Science.
Lifecycle Status	Select the lifecycle status for this constituent. Choices are *Suspect,Prospect* or *Inactive.* Additionally *Applicant* , *Student,* and *Alumnus* statuses are set automatically by Campus EIPs.
Campus	Enter the campus in which this prospect is interested. This value is updated to the actual campus when the prospect becomes an applicant.
Status Date	The date that this Program's lifecycle status was last updated.
Plan	Enter an academic plan if it is known. You can enter multiple academic plan and sub plan pairs for a specific program.

Subplan	Enter an academic sub plan if known. It is possible to enter a plan without an associated sub plan.
Application Number	The admissions application number in Campus Solutions so that more details of the application can be viewed.
Application Status	The status of the application (taken from the Application program status).
Student Status	The current status of the student (for example *Withdrawn,Transferred, Active*, and so on).
Status Date	The date on which either the application status or student status was last updated.

Lifecycle Statuses

The Lifecycle status can be set to *Suspect,Prospect,* or *Inactive* at the Program level manually, but after the application process begins in Campus Solutions and the Applicant EIP sets the Program to the *Applicant* lifecycle status, then the status is grayed out and the Application ID and application status displayed. This is to ensure data integrity between CRM and Campus Solutions. Additionally, as the constituent moves through the process (becoming a Student, then an Alumnus, and so on), then the lifecycle status is updated and the Student status displayed . For more details of the application, student programs, and so forth, you can view the information in the 360–degree view or in the actual Campus Solutions components.

The following table shows the lifecycle statuses and their descriptions:

Status	*Description*
Suspect	A prospective student who has not yet contacted the Program.
Prospect	A prospective student who has expressed an interest in the Program.
Applicant	A person who has initiated or submitted an application for admission to the Program.
Student	A person who has enrolled in the Program.
Alumnus	A former participant in one or more of the Program's offerings.
Inactive	A person who is no longer active in the Program.

Viewing Last School Attended Information

Access the Last School page (click the Last School tab).

Academics – Last School page

The Last School tab displays information on the last school attended, which is used for marketing and recruiting purposes.

Last School Attended   Enter the last school that the prospect attended. Because 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. The postal code of the last school attended is added as one of the assignment fields within the Sales component for assigning recruiters.

Graduation Date   Enter the graduation date from the last school that the person attended.

School Type   Specifies the school type (for example, Secondary).

Proprietorship   Specifies whether the school is public or private.

City   The city in which the school is located.

State   The state in which the school is located.

Country   The country in which the school is located.

Postal Code   The school's postal code. This field is used in the Sales module to aid in assigning recruiters.

Self Reported GPA	Grade point average, as reported by the constituent.
Class Size	The number of students in the constituent's class group at the school.
Class Rank	The rank that the constituent attained at the school.
Class Percentile	The constituent's percentile in his or her class.

Viewing Constituent Test Scores

Access the Test Scores page (click the Test Scores link in the Toolbar).

Test Scores page

The Test Scores page displays information relating to official and self-reported test scores for the selected constituent. Test Score details are also automatically created by the Test Scores-related EIP that syncs data from Campus Solutions and by the Prospective Student Import process.

Test ID	Enter the test you are recording.
Component	Enter the first test component. Values for this field are determined by the test ID that you enter.
Score Percentile	Enter the score, percentile, or both for this test component.
Test Date	The date on which this test was taken.
Data Source	Select how this test information was reported. For example, the data could have been self-reported or received from a testing agency.
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.

Letter Score   Enter a letter score for this test component, if applicable.

Date Loaded   The default for the loaded date is your system date. You can edit this field if
                            necessary. If this information is electronically loaded, this field is
                            automatically populated with your system date the day the data is loaded.

Index   The LSAT 3-Year Test Index appears if this information has been loaded.

Standard Administration The system selects this check box by default, which indicates that this test
                            was administered in a standard way. Clear this check box if the test was
                            administered in a nonstandard or non-timed way.

In Campus Solutions, test score ranges are set up to define minimum and maximum values for each test score type. When the information is synced, the system validates the entered self-reported values to ensure that they fall within the specified ranges. Test ID security is also included in Campus Solutions, and is taken into account when prompting on the Test ID field. User ID-based security for test IDs ensures that users can see only prompt values for which they have permission. Test ID and Test Components are defined in Campus Solutions and the data is synchronized to CRM. Test ID and Test Component access security is also defined by User ID in Campus Solutions. The security data is synchronized to CRM and CRM ensures that the Campus Solutions security is validated in CRM.

Custom Profiles

In addition to the Academics and Test Score related information, a constituent's Higher Education data is also stored in custom profile tables. Custom profiles act as extensions to the CRM Customer Data Model and their data is used for purposes such as building Marketing audiences or personalizing Online Marketing email or web documents.

Custom profile tables that contain constituent data are populated by EIPs that sync data from Campus Solutions, the Prospective Student Import process, and also by the Online Application process in CRM.

Examples of custom profile tables are the Extracurricular Activity and Academic Interests profiles. These profiles are populated by an EIP from Campus Solutions and also by the Prospect Student Import process.

Academic Interests profile

Constituent Data Security

In Campus Solutions, entities such as Academic Institution, Career, Program, Plan, and Test ID are secured by User ID. For example, a user might be authorized to view or access only a certain subset of all Programs available under a Career.

This user security setup information specified in Campus Solutions is synced over to CRM. These setups are then used to enforce user security in CRM. In other words, security is applied consistently across both Campus Solutions and CRM.

When creating a new Academics entry for a Constituent, a user is only prompted for Institution, Career, Program, and Plan values for which he or she is authorized, based on the security definition. This validation prevents users from creating information for which they are not responsible. Similarly, when Test Scores are added for a constituent, users can create them only for Test IDs that they have been authorized to access. Thus, a user who is only authorized for the SAT and ACT Test IDs is not allowed to create Test Scores for other Test IDs.

Using Leads and Opportunities for Recruiting

Leads and opportunities are used by recruiters to track the history of their communication with a prospective student, track prospect contacts, and determine the current status of that prospect is in the recruiting cycle.

When a prospect is qualified from marketing activities , a lead is typically created in the Sales module and assigned to a recruiter. In CRM for Higher Education, you can assign recruiters by zip code of the last school attended and by institution, career, program, and plan for a more specialized recruiter. The recruiter can then follow up on the lead and track the progress of the prospect through the multiple lead statuses available.

The academic information for a prospect is displayed directly on the lead so that a recruiter can view and update the program and plan information in which a prospect may be interested. Once a lead progresses to a certain point (for example, when a constituent applies), the lead is converted to an opportunity and the recruiting process continues until the constituent becomes an applicant and then, it is hoped, an enrolled student.

This process is described in more detail in the Sales documentation.

See Also

PeopleSoft Sales 9.1 PeopleBook, "Understanding Sales Leads and Opportunities," Higher Education for Sales

PeopleSoft Sales 9.1 PeopleBook, "Creating Sales Leads and Opportunities"

Integrating with Campus Solutions

To fully leverage constituent relationships for the purpose of recruiting, retention and fundraising, you need to understand where your constituents are in the overall lifecycle. Without this insight, you might try to recruit students for programs in which they are already enrolled, send student retention surveys to graduated students, or worse, send admittance-related communications to prospects who were denied acceptance. CRM for Higher Education 9.1 provides a robust integration between CRM and Campus Solutions for tracking the constituent life cycle status from suspect to prospect to applicant to student to alumnus in order to ensure that recruiting, retention, and alumnus communications are targeted to the right audience.

The following diagram shows the typical Higher Education process flow, highlighting the points at which EIPs are run and how the lifecycle status changes throughout the process.
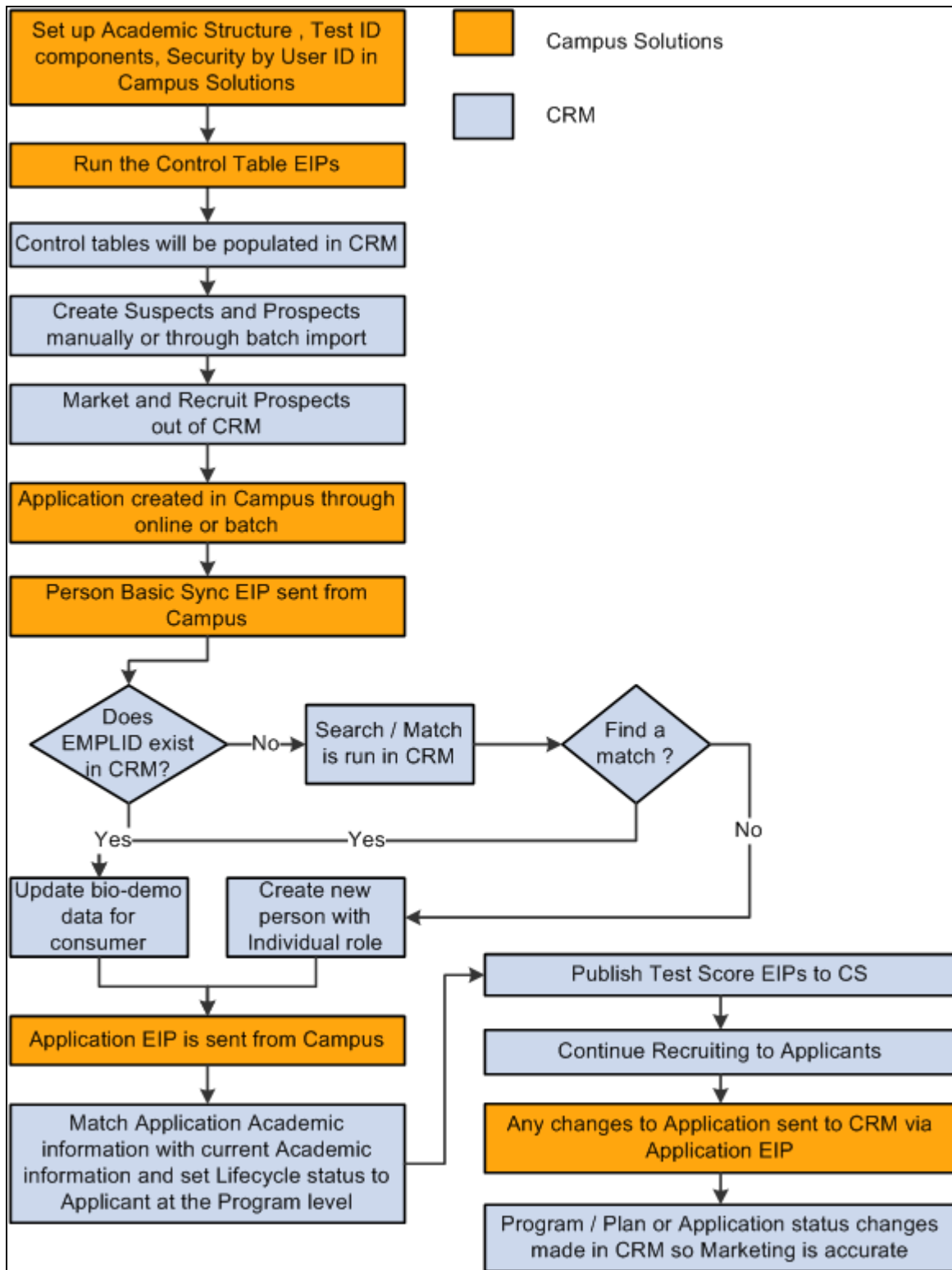
Higher Education business process incorporating EIP flows (1 of 2)
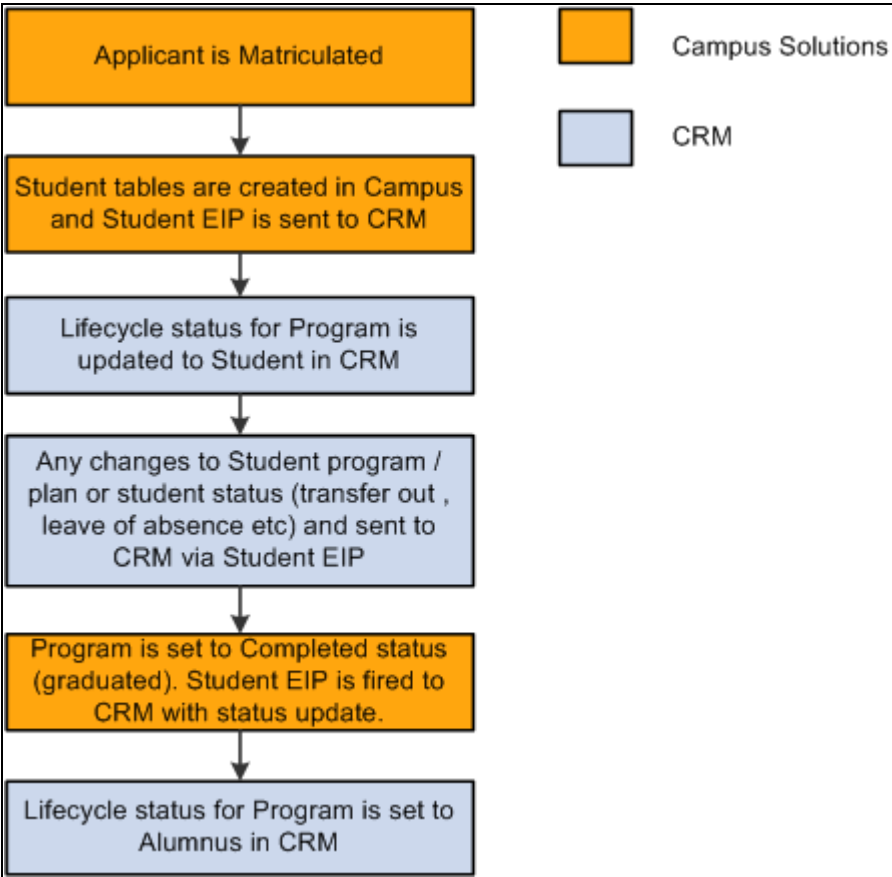
Higher Education business process incorporating EIP flows (2 of 2)

Note. The diagrams are connected—consider an arrow to exist pointing between "Program/Plan or Application status changes made in CRM so Marketing is accurate" in the first diagram, and "Applicant is Matriculated" in the second.

Page Used to Integrate With Campus Solutions

Page Name	Definition Name	Navigation	Usage
Customer Data Management System Options	BO_INSTALLATION	Set Up CRM, Common Definitions, Customer, Customer Installation Options, Customer Data Management System Options	Configure the system to allow users to call Search/Match functionality from PERSON_BASIC_SYNC

Syncing Control Tables

Setup information including academic structure, academic type and load, and school information will be sent to CRM for Higher Education so that prospective students can be created in CRM for Higher Education. Additionally, security constructs including institution, career, program and plan security by user ID, and test ID security are sent to CRM for Higher Education so that PeopleSoft CRM for Higher Education will respect the same security out of the box as the Campus Solutions system.

The following table shows the control table information that is synced from Campus Solutions.

Functionality	*Message Name*	*CRM Records to Update*
Academic Structure	SSR_ACADINST_SETUP_FULLSYNC	INSTITUTION_TBL
	SSR_ACADCAMP_SETUP_FULLSYNC	CAMPUS_TBL
	SSR_ACADCAR_SETUP_FULLSYNC	ACAD_CAR_TBL
	SSR_ACADPROG_SETUP_FULLSYNC	ACAD_PROG_TBL
	SSR_ACADPLAN_SETUP_FULLSYNC	ACAD_PLAN_TBL
	SSR_ACADSUBPLAN_SETUP_FULLSYNC	ACAD_SUBPLN_TBL
	SSR_ACADTRM_SETUP_FULLSYNC	TERM_TBL
	SSR_ACADINST_SETUP_SYNC	INSTITUTION_TBL
	SSR_ACADCAMP_SETUP_SYNC	CAMPUS_TBL
	SSR_ACADCAR_SETUP_SYNC	ACAD_CAR_TBL
	SSR_ACADPROG_SETUP_SYNC	ACAD_PROG_TBL
	SSR_ACADPLAN_SETUP_SYNC	ACAD_PLAN_TBL
	SSR_ACADSUBPLAN_SETUP_SYNC	ACAD_SUBPLN_TBL
	SSR_ACADTRM_SETUP_SYNC	TERM_TBL
External Org	SCC_EXT_ORG_SYNC	EXT_ORG_TBL
		ORG_LOCATION

Functionality	Message Name	CRM Records to Update
		EXT_ORG_TBL_ADM
	SCC_EXT_ORG_FULLSYNC	EXT_ORG_TBL
		ORG_LOCATION
		EXT_ORG_TBL_ADM
School Type Setup Table	SCC_SCHL_TYPE_SETUP_SYNC	LS_SCHL_TYP_TBL
	SCC_SCHL_TYPE_SETUP_FULLSYNC	LS_SCHL_TYP_TBL
Test Component - Setup	SAD_TEST_SETUP_SYNC	SA_TEST_TBL
		SA_TCMP_REL_TBL
	SAD_TEST_SETUP_FULLSYNC	SA_TEST_TBL
		SA_TCMP_REL_TBL
	SAD_TEST_COMP_SYNC	SA_TEST_CMP_TBL
	SAD_TEST_COMP_FULLSYNC	SA_TEST_CMP_TBL
	SAD_TEST_SCRTY_SYNC	SAD_TEST_SCTY
	SAD_TEST_SCRTY_FULLSYNC	SAD_TEST_SCTY
Admit Type Setup	SAD_ADMITTYPE_SETUP_FULLSYNC	ADMIT_TYPE_TBL
	SAD_ADMITTYPE_SETUP_SYNC	ADMIT_TYPE_TBL
Academic Structure Security	SSR_SCRTY_INST_UID_FULLSYNC	SCRTY_TBL_INST
	SSR_SCRTY_INST_UID_SYNC	SCRTY_TBL_INST
	SSR_SCRTY_CAR_UID_FULLSYNC	SCRTY_TBL_CAR
	SSR_SCRTY_CAR_UID_SYNC	SCRTY_TBL_CAR
	SSR_SCRTY_PROG_UID_FULLSYNC	SCRTY_TBL_PROG
	SSR_SCRTY_PROG_UID_SYNC	SCRTY_TBL_PROG

Functionality	Message Name	CRM Records to Update
	SSR_SCRTY_PLAN_UID_FULLSYNC	SCRTY_TBL_PLAN
	SSR_SCRTY_PLAN_UID_SYNC	SCRTY_TBL_PLAN
Referral Source Sync	SAD_RFRL_SRC_SETUP_SYNC	REFERL_SRCE_TBL
	SAD_RFRL_SRC_SETUP_FULLSYNC	REFERL_SRCE_TBL

Note. Note: When you sync an institution using SSR_ACADINST_SETUP_SYNC or SSR_ACADINST_SETUP_FULLSYNC, a new profile field is created. In order to activate the profile, you must run the Application Engine program RA_PROF_CACH to clear the profile cache. You must also clear the application server cache and recycle the application server.

Syncing Constituent Information

To provide a real time update from Campus Solutions to CRM for Higher Education, incremental syncs are included for prospect, applicant, and student data. As changes are made in Campus Solutions to the prospect, applicant, or student (including applicant status, change of program, plan, and so on), real time messages are sent to CRM so that CRM always has the most up-to-date information about that constituent, ensuring accurately targeted communications.

Functionality	Message Name	CRM Records to Update
Person Data Extended Sync	SCC_SRVC_IND_SYNC	Profile - CS-ADM Service Indicators
		CS_SRVC_IND_DAT
	SAD_ADM_INTEREST_SYNC	Profile - CS-ADM Academic Interests
		CS_INTERESTS
	SSR_EXTRACUR_ACTVTY_SYNC	Profile - CS-ADM Extracur Activity
		CS_EXCR_ACTVTY
	SAD_EXT_ACAD_DATA_SYNC	Profile - CS-ADM Academic History
		CS_ACAD_HISTORY
	SCC_PERSON_SYNC	Profile - CS-Person
		CS_PERS_DATA_SA
Prospect	SAD_ADM_PRSPCT_DATA_SYNC	RD_CONSTITUENT

Functionality	Message Name	CRM Records to Update
		RD_CAREER
		RD_PROGRAM
		RD_PLAN
		RD_SUBPLAN
	CS_ADM_PRSPCT_DATA_FULLSYNC	RD_CONSTITUENT
		RD_CAREER
		RD_PROGRAM
		RD_PLAN
		RD_SUBPLAN
Applicant	SAD_ADM_APPL_DATA_SYNC	RD_CONSTITUENT
		RD_CAREER
		RD_PROGRAM
		RD_PLAN
		RD_SUBPLAN
	CS_ADM_APPL_DATA_FULLSYNC	RD_CONSTITUENT
		RD_CAREER
		RD_PROGRAM
		RD_PLAN
		RD_SUBPLAN
Test Score Sync	SAD_TEST_SCORES_SYNC	RD_TEST
		RD_TEST_SCORE
	CS_TEST_SCORES_FULLSYNC	RD_TEST
		RD_TEST_SCORE
Student Status Change	SSR_ACAD_PROG_SYNC	RD_CONSTITUENT
		RD_CAREER

Functionality	Message Name	CRM Records to Update
		RD_PROGRAM
		RD_PLAN
		RD_SUBPLAN
	SSR_ACAD_PROG_FULLSYNC	RD_CONSTITUENT
		RD_CAREER
		RD_PROGRAM
		RD_PLAN
		RD_SUBPLAN

Using Search/Match with PERSON_BASIC_SYNC

 When a person is created in Campus Solutions, the person information is sent over to CRM via the PERSON_BASIC_SYNC process. Because suspects and prospects are brought directly into CRM, these individuals exist in the system, but do not have an EmplID. Because of this, it is important that when the person information is processed in CRM, the system must recognize whether that person already exists in order that his or her information can be updated. If this link is not made, then the person could end up existing in the system in two different places, once as a suspect or prospect, and once as a student or applicant.

Because of this, and in order to ensure that the number of duplicates between CRM and Campus Solutions is limited, the Search/Match process is called when the system does not find the EmplID associated with an individual.

Process Flow

The following flow chart illustrates the path that the PERSON_BASIC_SYNC process follows as it determines whether to create a new Person record or update an existing one.

```
┌─────────────────────┐
│ Process Person Basic│
│      Sync row       │
└─────────────────────┘
           │
           ▼
      ◇ Is EMPLID ◇ ──No──▶ ┌─────────────────────┐
      ◇ populated? ◇        │ Write row to error log│
           │                │ file (only relevant for│
          Yes               │ third party interfaces)│
           │                └─────────────────────┘
           ▼
┌─────────────────────┐
│ Search for emplid in│
│ Emplid/Person_id xref│
│       Table         │
└─────────────────────┘
           │
           ▼
      ◇ EMPLID match ◇ ──Yes──▶ ┌─────────────────────┐
      ◇   found?    ◇           │ Update Person Record│
           │                    │ with new Row details│
          No                    └─────────────────────┘
           │
           ▼
      ◇ Is Search / Match ◇ ──No──▶ ┌─────────────┐
      ◇    enabled?     ◇           │ Add Person  │
           │                        └─────────────┘
          Yes
           │
           ▼
┌─────────────────────┐
│ Call Search / Match │
│         API         │
└─────────────────────┘
           │
           ▼
      ◇ No Match or multiple ◇ ──Yes──▶ ┌─────────────────────┐
      ◇     matches?        ◇           │ Create Person with  │
           │                            │  Individual Role    │
          No                            └─────────────────────┘
           │
           ▼
┌─────────────────────┐
│ Update Person with  │
│    row details      │
└─────────────────────┘
```

PERSON_BASIC_SYNC process flowchart

If the system does not find an EmplID and Search/Match is enabled, the Search/Match functionality is invoked, passing the API a PERSON_BASIC_SYNC-specific Configuration ID that does not allow the person to be placed in suspense. If multiple matches occur, the person is added with the individual role but a message is logged to inform you that multiple matches exist.

Configuration Setup to Enable Search/Match

Access the Customer Data Management System Options page (Set Up CRM, Common Definitions, Customer, Customer Installation Options, Customer Data Management System Options).

Customer Data Management Search Options page

You can configure the system to allow users to call Search/Match functionality from PERSON_BASIC_SYNC incremental message. By default, this capability is not enabled. To configure the capability, you use the Customer Data Management System Options page.

Enable Search Match for EIP   Select to enable the calling of the Search/Match functionality when processing the PERSON_BASIC_SYNC messages. PERSON_BASIC_FULLSYNC is not compatible with Search/Match.

Search Match Configuration ID	When calling the Search/Match functionality from PERSON_BASIC_SYNC, the SMRA_PBSEIP configuration is required (this configuration does not permit matches to be placed into the Suspense state). You cannot change this value.

The SMRA_PBSEIP Configuration

When Search/Match is enabled, records that are imported using PERSON_BASIC_SYNC and that do not have an EmplID are not permitted to be placed in the Suspense state (they must be added to the database). To ensure that this occurs, the SMRA_PBSEIP configuration is used with this import.

SMRA_PBSEIP configuration

By default, records that match a single existing record in the CRM database are updated (you can change this action to *Add*), and records matching multiple existing records are added (you cannot change this action). If no match is found, the new record is added to the CRM database. Only the *Add* option is available for records for which an EmplID is not found.

Campus Solutions Changes That Can Affect Academic Information and Lifecycle Status

There are a number of different functions on the Campus Solutions side that can affect the academic information and lifecycle status. These include:

• Adding a suspect or prospect in Campus Solutions.

• Creating an application in Campus Solutions.

• Student status change.

Adding a Suspect or Prospect in Campus Solutions

Because suspects and prospects can be created in CRM, typically they are not created in Campus Solutions. The reason for this is to reduce the number of prospective students in the Campus Solutions database who might not subsequently enroll. However, it is still possible to create suspects and prospects in Campus Solutions; these are synced to CRM through the existing EIPs.

A suspect or prospect can be created in Campus Solutions using the Maintain Prospect component or other Campus Solutions batch load processes, and the prospect EIPs sync this data over to CRM.

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Introducing Customer Relationship Management for Higher Education"

See *PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook*

Creating an Application in Campus Solutions

There are a number of ways to create an application in Campus Solutions, either manually through the Application Entry process or through the Admissions load process. After an application is created , the Application EIPs send the application information to CRM. If a new person was created as part of the application process, then PERSON_BASIC_SYNC and the search/match logic in CRM should have created the link between the new person in Campus Solutions and the existing person in CRM. The Application EIP then attempts to match on the Career, Institution, Program and Plan (which are mandatory fields for the application process). If a match is found, then the lifecycle status of the matching program is set to Applicant and the Application Number and Application Status (Program Status field from the application in Campus Solution) are displayed.

This is the process whereby the lifecycle status of *Suspect* or *Prospect* is set to *Applicant* through the Application EIP. After a person becomes an applicant, any official or self-reported test scores are published to Campus Solutions; these are used as part of the application evaluation process. As the application's status changes, those changes are sent to CRM in real time so that CRM has the most current information about the applicant for accurate targeted marketing.

After the application status is set to *Matriculate,* the Student Status Change message is sent to CRM and the applicant's status updated to *Student.*

Student Status Change

 The Student Status Change message (SSR_ACAD_PROG_SYNC) is synced to CRM any time a change in either program or plan occurs (for example, a students decides to change major or do a double major), or a change occurs in the status of the student (for example, the student transfers out or takes a leave of absence). These changes are reflected in CRM in real time so that the most accurate information is available. After the constituent becomes a student, the focus of CRM moves from recruiting to retention.

 The lifecycle status is set to *Alumnus* when the Program Action is *COMP* and Program Status is *Completed.* The CRM focus then shifts to fundraising from retention. The trigger points for the SSR_ACAD_PROG_SYNC message are described in the Campus Solutions documentation.

See *PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook*

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook,* "Introducing Customer Relationship Management for Higher Education"

Chapter 3

Retaining Students

This chapter provides an overview of the student retention process and discusses:

* Using the Student Status Change Enterprise Integration Point (EIP).

* Dynamically Accessing Student Data.

Understanding Student Retention

The cost of replacing a student is far higher than that of retaining one. After you have recruited and enrolled the best set of applicants, you want to ensure that you retain them. CRM for Higher Education 9.1 includes several features that enable higher education institutions to retain more students by deepening their relationships using all the information the institutions know about the students and by better resolving their issues.

To successfully retain students, you must have access to the data that gives you a better picture of the student's situation and whether he or she is at risk. Some at-risk factors might be financial needs, decreasing GPA, or lack of participation in classes, clubs, and so on. You must be able to identify these red flags, which are typically housed in Campus Solutions, and proactively reach out to the student before it is too late. In CRM for Higher Education 9.1, you can access student information in two ways:

* Student Enterprise Integration Point (EIP).

* Building Audiences from Student Data.

Using the Student Status Change Enterprise Integration Point (EIP)

The Student Status Change EIP sends student information from Campus Solutions to CRM for Higher Education. This includes student program, plan, and status information (program actions and the reasons for these actions, such as withdrawn or transferred out) . If a student's status changes or the student changes programs or plans, then a real-time message is sent to CRM for Higher Education to reflect that change.

Understanding the Student Status Change EIP

With Release 9.1 of CRM, Marketing and Recruiting functions previously performed in Campus Solutions now occur in CRM. This allows the Campus Solutions database to be kept clean of prospects that do not turn into applicants and also to use specialized CRM business processes.

- Users such as marketers, recruiters, and agents in CRM are able to view, add, and update Higher Education constituent data in different stages of the lifecycle (suspect, prospect, applicant and so on). In order to maintain an accurate representation of a constituent in CRM, changes to relevant constituent data and setup information that are made in Campus Solutions must be kept in sync with CRM.

- The Constituent 360 Degree View displays several Higher Education specific sections, which aids institutions in building and maintaining relationships with the constituents. This information must be obtained from Campus Solutions in real time.

- Also, prospects and their test scores loaded from search tapes or test data files are posted directly to CRM, without their being stored in Campus Solutions. But when a prospect applies to the institution, the test scores maintained in CRM must be synced with Campus Solutions so that the application process can continue.

In short, a need exists for constant exchange of data between CRM and Campus Solutions. To enable this two-way data integration between Campus Solutions 9.0 and CRM 9.1, a large number of Enterprise Integration Points or EIPs are available. Most of these EIPs are asynchronous, while some of them are synchronous. Both full sync and incremental sync EIPs are available. Full sync EIPs synchronize an entire set of data from one database to the other. Incremental sync EIPs only synchronize data changes that happen due to events such as online updates or batch runs.

The Student Status Change EIP details are included in the Recruiting Students section along with the other EIPs.

Building Audiences from Student Data

Rather than having to bring all of the student information to CRM for Higher Education, you can dynamically access student data when building an audience for a retention program. In this way, an institution can set up its definition of an at-risk student on the Campus Solutions side and have CRM for Higher Education dynamically access that data when creating the audience.

By doing this, you can run retention programs to proactively reach out to these students. You can use surveys to learn more about areas of dissatisfaction or concern and take action such as sending alerts to relevant staff and faculty, setting up a meeting with the student, calling the student, or replying with a personalized email that directly addresses the student's concerns. In addition to creating a two-way communication with the at-risk student, you can invite him or her to targeted retention events that provide face-to-face assistance.

In order to reduce replication of data from the source database into CRM, users can build audiences by dynamically accessing data residing in Campus Solutions and other remote databases.

The following diagram shows the four categories of EIPs.
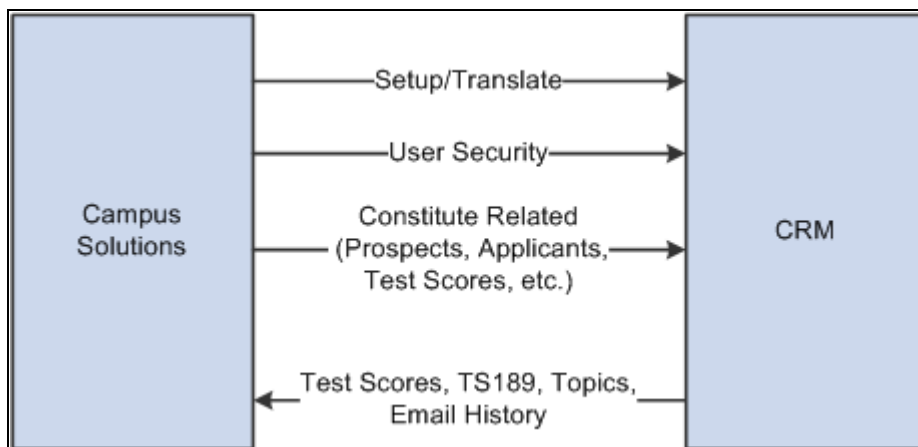
CRM/Campus Solutions EIPs

The first three categories consist of EIPs that sync setup and translate tables, user security tables, and constituent-related information from Campus Solutions into CRM. The final category consists of EIPs that move data from CRM into Campus Solutions.

Setup and Translate Tables

Setup and Translate type tables in Campus Solutions are synced into CRM so that they can be used for building prompts and lists of valid values for CRM components. EIPs that perform this function are available in both incremental sync and full sync versions. This category consists of several EIPs.

• A set of EIPs publish data related to Academic Structures. These includes EIPs for syncing Academic Institution, Career, Plan, Sub Plan, Campus, and Academic Term information.

• The Admit Types EIP publishes setup data related to Admit Types.

• A set of External Organizations EIPs publish External Organization data that includes Organization details, Location and Location Phones, Contact and Contact Phones, Department and Department Phones, and School data. Of all the data published, only School Data is used in CRM.

• The School Types EIP is designed to publish setup data related to School Types.

• The Test Setups EIPs publish Test related setup data such as Test IDs, Test Components and Test ID to Test Component associations.

• The Referral Sources EIP syncs referral source setups that can be used in CRM for recruiting.

User Security

Tables in Campus Solutions that store user security information are also synced to CRM, so that the same security rules can be consistently enforced in both databases

• The Test ID Security EIP is designed to publish any transactional changes like adds, updates, and deletes that are done to the Test ID user security tables in Campus Solutions.

• The Academic Structure Security EIPs publish user security information for Academic Structures like Academic Institution, Career, Program, and Plan. These EIPs have an incremental sync version to capture online changes from components as well as a full sync version.

- The Recruiting and Application Center Security EIP publishes details about user access to Recruiting and Application Centers. Here too, both the incremental sync and full sync versions are available.

Constituent Related

Several sets of EIPs sync constituent related information stored in Campus Solutions to CRM

- The Person Basic Sync EIPs publish person data like name and contact information, while several other related EIPs sync extended person information like Service Indicator, Academic Interests, Extracurricular Activities, External Academic Data, and Disability and Diversity information.

- The Test Scores EIP publishes a constituent's test score details to CRM. Both incremental and full sync versions are available.

- The EIP for Prospects publishes data from the Admissions Prospect entity, while the EIP for Applicants publishes data from the Admissions Application entity in Campus Solutions.

- The Student Status Change EIP is designed to publish any transactional changes like creates, updates, or deletes that are done to the Student Records Academic Program entity.

- Additionally, a synchronous EIP that fetches Higher Education information like 3Cs, Financial Aid, Transcript Requests, and so on from Campus Solutions and displays it in the CRM Constituent 360 Degree View is also available.

CRM to Campus Solutions EIPs

In addition to EIPs that send Campus Solutions data to CRM, EIPs that publish data from CRM into Campus Solutions are also available.

- When prospects apply to an Institution, test score data stored in CRM is published to Campus Solutions. The Test Scores EIP serves this purpose. These scores are then used to evaluate applications.

- The TS189 Application EIP sends application data including file attachments and long text responses from CRM to Campus Solutions.

- A person filling out an online application in CRM can be asked specific questions. The text for these questions is stored in the CRM database and sent to Campus Solutions using the Topics EIP.

- Emails generated from Online Marketing Dialogs in CRM are published to Campus Solutions where 3C Communication records are created.

Understanding Remote Audience Definition

In order to build an audience using Campus Solutions data, the Audience Builder includes the capability to tie an audience definition to a remote PSQuery. In order for this query to function correctly, a PSQuery must be defined in Campus Solutions. Query Access Services (QAS) is used to execute the query and query results data is moved across CRM using the integration broker. QAS enables this functionality via web-services architecture.

On the CRM side, the user creates an audience definition and selects a remote PSQuery to associate with the audience definition. CRM users can also pass WHERE clause parameters for this remote query.

Note. In order to use remote audience definition, PeopleTools 8.50 must be installed in both the CRM and the Campus Solutions databases.

Pages Used to Build Audiences from Student Data

Page Name	Definition Name	Navigation	Usage
Manage Audiences	RA_LIST_MAIN	Marketing, Manage Audiences	Define conditions to build an audience from remote Campus Solutions student data.

Defining a Remote Audience

Access the Manage Audiences page (Marketing, Manage Audiences).

Manage Audiences page (1 of 2)

Manage Audiences page (2 of 2)

Audience Source	To build an audience from Student Administration data, select *Internal using PSQuery.*
Is Remote Query	Set this value to *Yes.*
Remote Query	Enter the name of a remote query, or click the List Queries button to retrieve a list of available queries from the remote database. If you leave this field blank, then all PSQueries in the remote database are retrieved and displayed for you to choose from.
	Note. This field appears only after you have selected *Yes* in the Is Remote Query field.
Parameter	After you have selected a query, the names of the query's parameters are displayed in this list.
Parameter Value	Enter values for the query's parameters.
Execute Query	Click this button to run the PSQuery. The system executes the query and returns the results.
Modified Query SQL	Displays the SQL query that will be sent to the remote system.
Query Manager	Click this button to display the Query Manager, where you can search for queries in the system.

After you have generated and run the query to define the audience, you can generate the audience and save it.

See *PeopleTools 8.52: PeopleSoft Query PeopleBook*

See Also

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Using Audiences"

Chapter 4

Using Marketing Center Security

This chapter provides an overview of Marketing Center Security and includes the following sections:

- Enabling Marketing Center Security

- Defining Marketing Centers

- Assigning Marketing Centers

Understanding Marketing Center Security

In a complex multi-institutional environment, it is common for different groups within an organization to compete with each other for the best prospective students. For example, one group might purchase names of suspects and prospects from a third party and want to secure them in the system so that only they can see the prospective students' academic details. Another example would be a centralized set of prospects that everyone across the organization can access and a set of prospects that each department wants to secure so that only they can access prospective students' academic data.

In addition to securing prospective students, it is also possible to secure marketing information such as audiences, dialogs, documents, and marketing program data by one or more Marketing Centers so that only authorized users are allowed to access these marketing details.

Understanding Marketing Centers

The concept of a Marketing Center in CRM mirrors the Recruiting and Applicant Centers in Campus Solutions. When a prospect or an applicant is created in Campus Solutions, that person is associated with a Recruiting or Applicant Center and the users that are authorized to those Centers can then access the prospect or applicant details. The CRM Marketing Center functionality behaves in a similar manner in that users can be authorized to one or more Marketing Centers, and suspects and prospects are assigned to a Marketing Center. When building an audience, only those audience members to which the user is authorized are created as part of that audience using data stored in the CS_Constituents profile.

Additionally, in order to secure the various marketing components, this release adds a Marketing Center grid (including Marketing Centers and their related Institution and Center types) to them. Search functionality for the components will exclude any secured component that the user is not authorized to access.

Components that make use of Marketing Center Security include:

- Event Management.

- Manage Audiences.

- Dialog Designer.

- Document Designer (both email and web).

- Document Templates.

- Marketing Programs.

- Profile Definition.

- 360 Degree View.

- Interactive Reports.

Additionally, the security check is enhanced for other components that allow transfer to the secured components.

Marketing Centers are not driven by SetID; values defined can be used across all business units.

Understanding Marketing Center Security

If the Secure Prospective Students by Marketing Center option is enabled, visibility to a prospect will depend upon the Marketing Center(s) to which the signed in user has access.

The following access rules apply to prospect visibility:

- If the Marketing Center to which a user belongs is assigned to a prospect's Career level or to any of the prospect's Programs, then the user will be able to access the prospect and view all of that prospect's Career and Last School information in the Academics component. The user will be able to locate the prospect using the Academics Search.

- A user can see information about a particular Program in the Academics component's Program and Plans tab only if the Marketing Center to which the user belongs has been assigned to that Program.

- A user can see information about a particular Program in the Academics component's Program and Plans tab only if the Marketing Center to which the user belongs has been assigned to that Program or Career.

The following diagram shows the evaluation rules that are used to determine whether a particular user has access to information about a prospect.
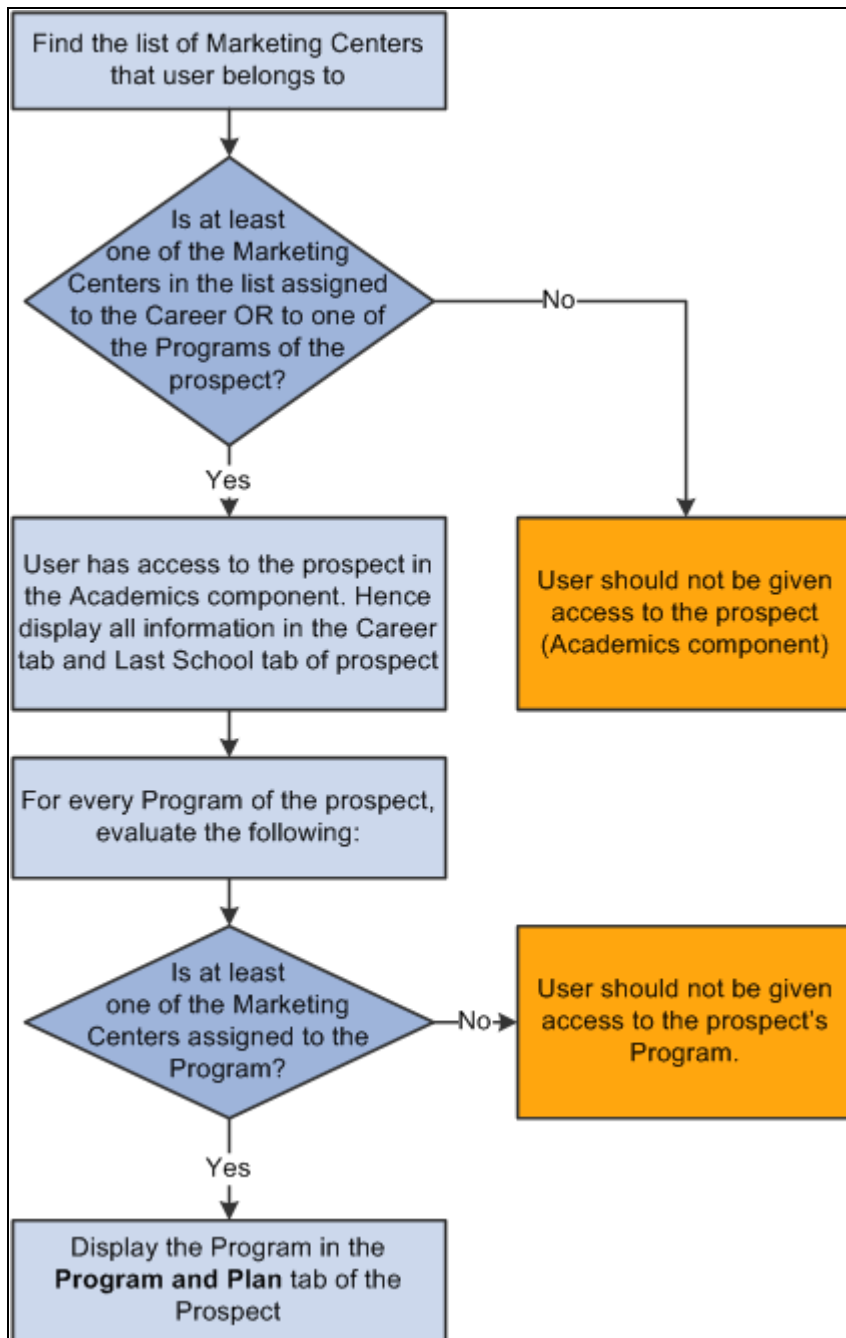
Evaluation Rules

What Marketing Center Security Controls

It is important to understand that access to prospects is not controlled by Marketing Center Security. A prospect does not "belong to" a Marketing Center; prospects are simply consumers, and any signed-in user with the appropriate role can view their information (email address, phone number, and so forth). Rather, a Marketing Center restricts access to the prospect's academic interest information—his or her Program, Plan, and Career interests. For example, a recruiter for the Engineering department would be able to see all the information about a prospect except that prospect's interest in Programs, Plans, and Careers that are not part of the Engineering department. Despite the fact that the prospect might have expressed interest in Computer Science, Biology, and Engineering, Marketing Center Security would enforce access so that the Engineering recruiter could only see the Engineering interest.

Enabling Marketing Center Security

Before you can use Marketing Center Security to secure academic prospects, you must enable it. You do this with the Higher Education Options page (Set Up CRM, Product Related, Higher Education, Higher Education Options).

Higher Education Options page

Secure Prospective Students by Marketing Center	Select this check box to enable Marketing Center Security for Higher Education recruiting. This means:

- A user's access to prospects' Academic Interests will depend upon the Marketing Centers to which the user belongs.

- Authorized users will be able to manually or auto-assign Marketing Centers to a prospect.

- The Prospect Student Import process will assign a Marketing Center to each prospect that is part of the import.

- Prospect Data Enterprise Integration Points (EIPs) will attempt to assign Marketing Centers (of type Recruiting) to each prospect's academic interests when syncing prospects from Campus Solutions.

Enable Automatic Assignment of Marketing Centers	This option is disabled unless the Secure Prospective Students by Marketing Center option is selected. If it is selected, Campus Solutions prospects that are brought into CRM by the Prospect Data EIP are automatically assigned Marketing Centers. The check box is not checked by default, even if Secure Prospective Students by Marketing Center is selected.

Defining Marketing Centers

This section provides an overview and discusses the following topics:

• Understanding Marketing Center definition.

• Defining Marketing Centers.

• Searching for Marketing Centers.

Pages Used to Define Marketing Centers

Page Name	Definition Name	Navigation	Usage
Define Marketing Center	RA_MKT_CTR	Select a Marketing Center in the Marketing Center Tree, then click the Add Child Node, Add Sibling Node, or Edit icon.	Add a new child or sibling Marketing Center to the Marketing Center Tree, or edit a Marketing Center.
Marketing Center Search	RA_MKTCTR_SEARCH	Set Up CRM, Product Related, Marketing, Marketing Center, Marketing Center Search	Search for Marketing Centers
Search Academics	RA_ACADEMICS_SRCH	Customer CRM, Search Person Select a person and then click the Academics toolbar item on the Person (Consumer) page.	Search for Institution and Career information about a prospect to which you have access.

Understanding Marketing Center Definition

You can create Institution, Career, and Program level Marketing Centers of type Recruiting, as that defines hierarchical relationships between them. For any Marketing Center, you can define one or more "child" or "sibling" Marketing Centers. However, each Marketing Center can have only one parent Marketing Center.

After they are created, Marketing Centers can be used in various components (such as audiences, documents, and templates).

A hierarchy of Marketing Centers serves two purposes:

- Determine Hierarchical User Access: It allows hierarchical user access to be defined, where a user at a higher level Marketing Center in the tree is automatically given access to each of its child marketing centers.

- Define Assignment Rules: It allows a hierarchy of rules to be specified, which is invoked by the Assignment Engine in order to determine Marketing Center access to prospects at their career and program levels.

The Marketing Center Tree

Marketing Centers are added, edited, and organized hierarchically using a tree structure similar to the existing Tree Manager. A "node" in the Marketing Center Tree represents each Marketing Center in the system. Only one Marketing Center Tree definition exists in the system.

Note. You can create three levels of Marketing Centers under the Root node: Institution, Career, and Program level.

Setting Up Marketing Centers

Access the Marketing Center Tree using the Manage Marketing Center Tree page (Set Up CRM, Product Related, Marketing, Marketing Center, Manage Marketing Center Tree).
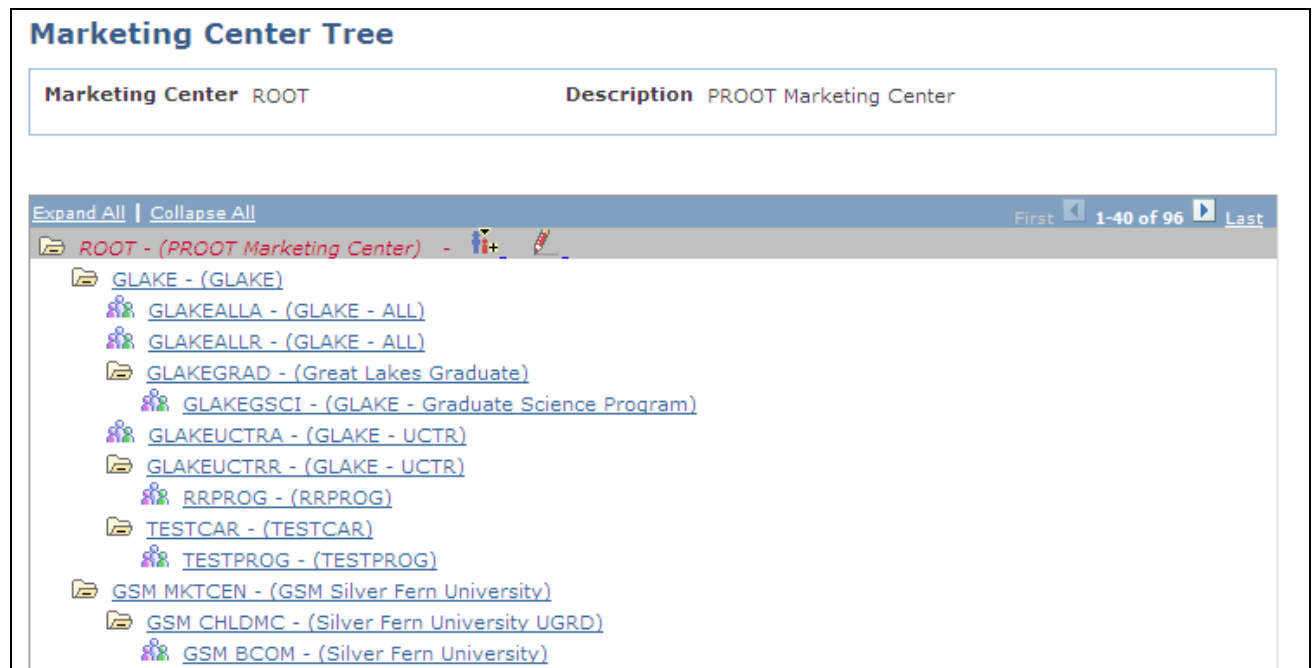
Marketing Center Tree page

Each node in the Tree represents a Marketing Center; to edit the node requires editing the Marketing Center Definition component.

Users with the Marketing Center Administrator role can set up Marketing Centers in CRM and manage the Marketing Center tree. Institution level Marketing Centers are created when the full-sync EIPs are run. Then, any Recruiting Centers and Applicant Centers that are synced from Campus EIPs into CRM are automatically added to the tree below the corresponding institution levels.

The following table shows the icons in the Marketing Center Tree:

(edit marketing data)	Edit the Marketing Center data.
(Insert Child Node)	Add a Marketing Center as a child node of the currently selected Marketing Center. This option is disabled at the Program level.
(Insert Sibling Node)	Add a Marketing Center at the same level as the currently selected Marketing Center.
(Delete)	Remove the selected Marketing Center from the Marketing Center Tree.
	Note that you can never delete the Root Marketing Center, nor can you delete a Marketing Center that has already been assigned one or more prospects or that is used or selected anywhere (for example, in an Audience, Event, or Dialog).
	This icon does not appear next to a Marketing Center that has been created via EIP.

Default Marketing Centers

If the Higher Education option is enabled on the Installation Options page, then bringing up the Tree Manager before any Marketing Center definitions are specified displays the following hierarchy of Marketing Centers by default. These Marketing Centers are automatically created when full-sync EIPs are run–you cannot create or delete them.

•   Root Marketing Center.

•   Institution-level Marketing Center.

The Root and Institution-level Marketing Centers are called "default" Marketing Centers, because they are not defined by users. All other Marketing Centers are called "user-defined" Marketing Centers.

If the Higher Education option is disabled, only the Root Marketing Center appears by default—no Institution-level Marketing Centers will initially exist in the tree. You can add user-defined Marketing Centers directly under the Root Marketing Center.

Note. If the Higher Education option was previously enabled and then subsequently disabled, all Institutions that were synced from Campus Solutions will remain in the tree, and the synced Institution-level Marketing Centers will be open for editing.

The Root Marketing Center is the highest level Marketing Center in the Marketing Center tree. It is a system-defined Marketing Center used to represent a group of institutions or a University system. Users added at Root Marketing Center level will have access to all levels of Marketing Centers below Root.

From the Root Marketing Center, you can perform the following operations:

•   Edit Marketing Center data.

- Add and remove users.

- Edit Marketing Center descriptions.

- Add a child Marketing Center.

You can change the name of the Root Marketing Center by clicking Edit and editing the Description field on the Root Detail page.

Below the Root level are Marketing Centers that correspond to each Institution present in the system. Each of these Marketing Centers represents an Institution, and all user-defined Marketing Centers (Recruiting and Applicant) are placed below this level.

Upon initial installation, the Root Marketing Center is created.

Note. In order to create any Institution Level Marketing Centers under the Root Marketing Center from the Institutions already existing in the system, you must run the full sync EIPs.

Additionally, when a new Institution is added using the Campus Solutions EIPs, a new Marketing Center node is automatically added for it, directly below the Root Marketing Center.

From Institution Level Marketing Centers, you can perform the following operations:

- Edit Marketing Center data.

- Add a child Marketing Center.

- Add a sibling Marketing Center.

User-Defined Marketing Centers

User-defined Marketing Centers are created by administrator users in CRM or from Campus Solutions EIPs.

Marketing Centers created in CRM can only be of type Recruiting. You cannot manually create a Marketing Center of type Applicant.

Marketing Centers that are created in CRM as a result of the Campus Solutions Recruiting Center and Application Center EIPs can be either type Recruiting or type Applicant. Marketing Centers of type Applicant can be added to CRM only by the Campus Solutions EIPs.

You can delete manually created user-defined Marketing Centers if they are not currently in use. Marketing Centers created in CRM by Campus Solutions EIPs cannot be deleted.

From User-Defined Marketing Centers, you can perform the following operations:

- Edit Marketing Center data.

- Add and remove users.

- Edit Marketing Center Descriptions.

- Add or remove assignment criteria.

- Manage Marketing Center status.

- Add a child Marketing Center.

- Add a sibling Marketing Center.

- Delete a non-Root Marketing Center that has not been assigned to any prospects or used in other components such as Audiences, Profiles, Dialogs, and so forth.

Defining Marketing Centers

Access the Define Marketing Center page (click the Add Child Node, Add Sibling Node, or Edit icon in the Marketing Center Tree).

Define Marketing Center page

Name	The name of the Marketing Center. You cannot edit this name on existing Marketing Centers, but you can edit it when inserting a new Marketing Center using the Add Sibling or Add Child processes. This field is required.
	You cannot use special characters such as , /, \, $, *, [, and] in Marketing Center names. Refer to PeopleTools documentation for a list of all non-allowed characters.
Status	Defines whether the Marketing Center is active. This field is hidden if the Higher Education option is not enabled. This field is required. On a Career level Marketing Center, the status cannot be changed to Active unless Assignment Criteria have been defined. Note that users can still create and save a Career level Marketing Center without having Assignment Criteria defined, but the status will be set to Inactive upon Save.
Description	Description of the Marketing Center. You can edit this field, and it is required.
Institution	The institution to which the Marketing Center belongs. The content of this field is derived from the Institution level Marketing Center. If the Higher Education option is not enabled, the field is hidden. This field is not editable, and it is required.

Center Type	This value is either Recruiting Center or Applicant Center. The value comes from the EIP if the Marketing Center is created automatically; if it is created manually you can edit the field but you can only select the Recruiting Center option. This field is hidden if the Higher Education option is not enabled.
Center Name	This value is RCTR (Recruit Center) or APPL (Application Center), depending on the type of Marketing Center as set by EIP. The value comes from the EIP if the Marketing Center is created automatically; if it is created manually you can edit the field but you can only select the Recruit Center option. This field is hidden if the Higher Education option is not enabled.

Marketing Center Members Section

Operator ID	The Operator ID of the person to be added to the Marketing Center.
Name	The operator's name. This field is display only.
Employee ID	The Employee ID of the selected person. This field is display only.
Department	The department of the selected person. This field is display only.
Email Address	The email address of the selected person. This field is display only.
Delete Row Icon	Click to delete a user row. If the user was created using Campus Solutions EIP, the row cannot be deleted.
Add Member	Click to insert a new row.

Assignment Criteria Section

This section is disabled for Marketing Centers of type Applicant, because Assignment Criteria apply only to Recruiting Centers.

Connector	The connector between the rows. OR is the default and the only valid connector. The Connector field is blank for the first row.
Profile Field ID	For Level 3 Marketing Centers, the default value is Career. For Level 4 Marketing Centers, the default value is Program. The underlying profile used is CS_CONSTITUENTS.
Operator	Select an operator to build a condition. The available choices are: has at least one, has at least one empty, has none, has none empty, has only, has only empty, has other than, and has other than empty.

Value	Select a value for the condition. For Level 3 Marketing Centers, the list displays Career values; for Level 4 Marketing Centers, it displays Program values.

Searching for Marketing Centers

Access the Marketing Center Search page (Set Up CRM, Product Related, Marketing, Marketing Center, Search Marketing Centers).

Marketing Center Search page

You can use this page to search for Marketing Centers, or to search for the Marketing Center to which a member belongs.

Note. When searching for a team member name, only the Marketing Center to which the team member belongs is displayed in the search results. For example, if team member Stu Marx is a member of the Marketing Center INST and that Marketing Center has two child Marketing Centers (INSTC1 and INSTC2), he has access to all three Marketing Centers as a result of tree hierarchy, but only INST appears in search results.

Searching for Academic Information

Access the Search Academics page (Customers CRM, Search Person—select a person and click the Academics toolbar item).

Search Academics page

Note. In order for the Academics link to appear on the Person component toolbar, the Higher Education option on the General Options page must be enabled.

Marketing Center Security is enforced on the Search Academics configurable page. In addition to filtering records by search criteria specified by the user, an additional filter is applied so that only Academics records that the signed-in user is authorized to access are displayed.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up General Options," Setting Up General Options.

Assigning Marketing Centers

This section provides an overview and discusses the following topics:

• Assigning Marketing Centers.

• Reassigning Marketing Centers.

Pages Used to Assign Marketing Centers

Page Name	Definition Name	Navigation	Usage
Academics - Career	RD_ACAD_CAREER	Customers CRM, Academic Information, Academics	Displays information about the constituent's academic career.
Academics - Program and Plan	RD_ACAD_PROGRAM	Click the Program and Plan tab on the Academics page.	Displays information about the constituent's academic program, plan, and subplan.
Reassign Marketing Center	RA_MC_REASGNMNT	Marketing, Execution, Reassign Marketing Center	Assign or reassign a Marketing Center.

Understanding Marketing Center Assignment

The Marketing Center Assignment Engine is responsible for determining which Marketing Centers are eligible to be assigned to a prospect at the Career level and each of the Program levels. When the Assignment Engine is called for a prospect, the Marketing Center tree is traversed from the top to bottom and the Assignment Criteria of active Marketing Centers in the hierarchy are evaluated against the prospect to determine whether a Marketing Center qualifies to access the prospect. A list of all qualifying Marketing Centers from the tree is returned to the calling program.

The Assignment Engine can be called from the following places:

- When a user creates a prospect manually (for example, using the Academics component), the user can click the Auto Assign Marketing Center button at the Program level and Career level. This calls the Assignment Engine, which returns the list of qualifying Marketing Centers. If the Auto-assign button is clicked at the Career level, it assigns both Career and Program level Marketing Centers. If the button is clicked at the Program level, only Program level Marketing Centers are assigned.

- The Prospective Student Import process can call the Assignment Engine for every prospect being created or updated. This is based on a runtime option.

- The Prospect Data EIP can call the Assignment Engine for every prospect being created or updated. This is dependent upon product-level setup options.

- The Reassign Marketing Center page, where Marketing Centers and their children can be assigned or reassigned to prospects.

The input to the Assignment Engine is a prospect, which needs to be assigned Marketing Centers at the Career level, the Program level, or both. The output from the Assignment Engine is a list of qualifying Marketing Centers at the prospect's Career level and each of the Program levels (if they exist). When processing, the Assignment Engine refers to Marketing Center Tree setup to determine the list of Marketing Centers that qualify.

How the Assignment Engine Assigns Prospects

For each prospect on which it is operating, the Assignment Engine uses the following logic to return qualifying Marketing Centers at each level.
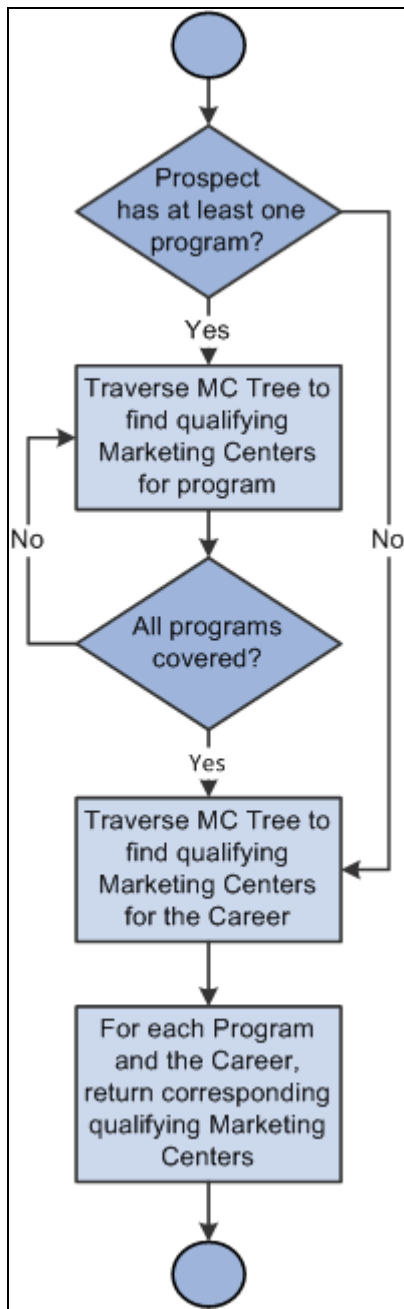
Marketing Center Assignment Engine Process

1. Determine whether the prospect has at least one program. (All prospects must have a Career, but do not necessarily have Programs.)

2. If the prospect has one or more Programs, traverse the Marketing Center Tree to identify all Marketing Centers with assignment criteria matching the prospect's Program-level information. The Assignment Engine traverses the tree once for each Program associated with the prospect. It then generates a list of all qualifying Marketing Centers for each of the prospect's Programs.

3. Next, the Assignment Engine traverses the Marketing Center Tree to find all Marketing Centers whose assignment criteria matches the prospect's Career level information.

4. Finally, the Assignment Engine returns corresponding qualifying Marketing Centers for each Program and for the Career.

How the Assignment Engine Traverses the Marketing Center Tree

The Assignment Engine uses the following procedure for traversing the Marketing Center Tree while searching for qualifying Marketing Centers:

1. Starting with the Root Node of the Marketing Center Tree, the Assignment Engine successively evaluates Assignment Criteria of each Marketing Center down the tree, comparing them against the input prospect at the appropriate level (Program or Career).

2. If a Marketing Center is not a match (that is, its assignment criteria do not apply to the prospect), then the Assignment Engine does not evaluate any of its child Marketing Centers. Further evaluation is unnecessary because the child Marketing Centers will evaluate to False as well.

3. When Assignment Criteria of a Marketing Center is evaluated at the prospect's Career level, all of the prospect's Program information is ignored even if Programs have been defined for the prospect. Only prospect data up to the Career level is considered. Therefore, a Marketing Center with criteria containing Program = <xxxx> will not be a match when evaluated at the Career level.

The Assignment Engine uses the following rules when evaluating Marketing Centers:

*   Marketing Centers of type Applicant are not evaluated, because you cannot specify Assignment Criteria for them.

*   The Root Marketing Center is always returned for every prospect in the system, even though you cannot define Assignment Criteria for it.

*   Inactive Marketing Centers and their children are never returned as qualifying Marketing Centers for a prospect.

*   Every Institution-level Marketing Center has an implicit Assignment Criterion of Institution = <Institution Code>. For example, the GLAKE Institution-level Marketing Center has the implicit criterion of Institution = GLAKE. This means that the GLAKE Marketing Center will qualify for every prospect created for Great Lakes University.

*   When evaluating Marketing Centers at a level below Institution, the Assignment Criteria of all higher level Marketing Centers (parent, parent's parent, and so forth all the way up to the Institution level) are appended to the Assignment Criteria of the evaluated Marketing Center. For example, consider a Marketing Center named GLAKEGRADR with the criterion Career = Graduate. When the Assignment Engine evaluates GLAKEGRADR, it automatically appends the Institution = GLAKE criterion, for a resulting Assignment Criterion of Institution = GLAKE AND Career = Graduate.

Assigning Marketing Centers

This section describes the process for assigning Marketing Centers.

Assigning Marketing Centers at the Career Level

Access the Academics – Career page (Customers CRM, Academic Information, Academics).

Academics - Career page

If the Secure Prospective Students by Marketing Center option is enabled on the Installation Options page, the Marketing Center Assignment grid is visible to users who can access a prospect's Career tab on the Academics page. Marketing Centers can be assigned manually or auto assigned using the Assignment Engine.

It is not necessary to identify any Marketing Centers for a prospect; by default, the Root Marketing Center has access to all prospects and need not be explicitly defined at the Career level.

Marketing Center   A description of the Marketing Center. If you add a Marketing Center manually, you can update this field. If you auto-assign a Marketing Center, it is display-only. Click the search icon to display a list of available Marketing Centers—only those of type Recruiting that the current user has permission to access are available for selection.

Marketing Center ID   The identifier of the Marketing Center. This field is display-only.

Source	The method in which the Marketing Center was added to the prospect. Values are:

- Manually Added: The Marketing Center was added by the user.

- Campus Solutions: The Marketing Center was added by a Campus Solutions EIP.

- Import: The Marketing Center was added by the Prospective Student Import process.

- Auto Assigned: The Marketing Center was assigned by the Assignment Engine using the Auto-assign feature.

Add Marketing Center	Click this button to add another Marketing Center row to the grid.
Auto Assign Marketing Center	Click this button to call the Assignment Engine and automatically assign Marketing Centers to the prospect based on assignment criteria.

To add a new Marketing Center manually, click the Add Marketing Center button. The following conditions apply to manually added Marketing Centers:

- Only Marketing Centers of type Recruiting can be added manually.

- The user must be authorized to the Marketing Center that is being added (that is, the user must either belong to the Marketing Center assigned or one of its parents). Any user who has access to the prospect's information can view any Marketing Centers assigned to the prospect, or delete them from the list of Marketing Centers assigned to the prospect.

- When a Marketing Center is manually added to a prospect, all of the Marketing Centers higher up in the hierarchy (that is, all parent and grandparent Marketing Centers up to the root Marketing Center) will also have access to the prospect. The Marketing Centers higher in the hierarchy do not need to be explicitly added on the Marketing Center grid for the prospect, because access is inferred from the Marketing Center Tree hierarchy.

- When a new Marketing Center is added, its Source is set to Manually Added.

- Only manually added Marketing Centers can be deleted.

- Users can update a manually added Marketing Center to a different one. The effect of changing a Marketing Center is the same as if the user had deleted the existing Marketing Center and added a new one.

To auto-assign Marketing Centers, click the Auto Assign Marketing Center button. This invokes the Assignment Engine for the prospect, which will return qualifying Marketing Centers. The following conditions apply to auto-assigned Marketing Centers:

- The Assignment Engine assigns Career-level Marketing Centers as well as Program-level Marketing Centers if the prospect has any Programs. The Marketing Centers returned will replace any auto-assigned Marketing Centers that have already been assigned on the Career tab. If any Marketing Centers already exist, the system displays a warning message cautioning you that any existing Marketing Centers will be replaced. Choose OK to proceed or Cancel to cancel the operation.

Note. Manually added Marketing Centers are not replaced—only those that have been auto-assigned by the Assignment Engine.

- When a new Marketing Center is added, its Source is set to Auto Assigned.

- Auto-assigned Marketing Centers are display-only. You cannot manually delete them.

- When you click the Auto Assign Marketing Center button from the Career tab it will also assign Program-level Marketing Centers if the prospect has any Programs specified.

Assigning Marketing Centers at the Program Level

Access the Program and Plan page (click the Program and Plan tab on the Academics page).

Program and Plan page

If Secure Prospective Students by Marketing Center Higher Education option is enabled, then users who can access a particular Program on a prospect's Program and Plan tab in the Academics component will see the Marketing Center Information grid on the page for each program displayed in the scroll area.

The Center Information grid allows you to assign a Marketing Center to that particular Program for the prospect, view Marketing Center(s) that have been previously assigned, and delete manually assigned Marketing Centers.

To add a new Marketing Center manually, click the Add Marketing Center button. Refer to the section on Manually Assigning Marketing Centers at the Career Level for the conditions that apply.

To auto-assign Marketing Centers, click the Auto Assign Marketing Center button. The Marketing Centers returned for the particular program are updated on the prospect's Program, replacing auto assigned Marketing Centers that have already been assigned. Refer to the section on Auto-assigning Marketing Centers at the Career Level for other conditions that apply.

Reassigning Marketing Centers

Access the Reassign Marketing Center page (Marketing, Execution, Reassign Marketing Center).

Reassign Marketing Center page

Marketing Center	Specify the Marketing Center to be reassigned. You can specify one or more Marketing Centers. This is a required field.
Include Child Marketing Centers	Select this check box to perform reassignment for the specified Marketing Center and all child Marketing Centers associated with it. Otherwise, only the explicitly defined Marketing Center is affected.
	During the reassignment process, all prospects are re-evaluated.
Delete Where Manually Added	Manually added marketing centers are always retained unless you select this check box. If the check box is selected, Marketing Centers that have been manually added to prospects are deleted during the reassignment process.

Before you can reassign Marketing Centers for prospects, you must modify the assignment rules on the appropriate Marketing Center definitions.

Chapter 5

Working with the 360-Degree View

This chapter provides an overview of using the 360-Degree View with CRM for Higher Education.

Note that the detailed description of the 360-Degree View for Higher Education is provided along with the other 360–Degree View related documentation; this chapter provides only an overview of how a Higher Education user might make use of its functionality.

See Also

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Defining Options for Integration to PeopleSoft Campus Solutions"

Understanding the 360-Degree View for CRM for Higher Education

Many higher education administrators have expressed the need to use data to better manage their institutions, improving business processes to efficiently build relationships with key constituents. The lifecycle of constituent relationship management starts with the admissions process and extends into alumni relations. A full lifecycle approach to relationship management includes activities such as increasing the pipeline of potential suspects and prospects, retaining existing students, and expanding donor relations.

The 360-Degree View aids in these activities by providing:

- A full view of the constituent for all stages of the constituent lifecycle including suspects, prospects, applicants, students, and alumni.

- A true 360-degree view of the person as well as tracking transactional data, biographical data, and interactions for a person who may have one or more roles including consumer, contact of a company, and worker.

- Integration to PeopleSoft Campus Solutions to display summary information that assists generalists and specialists in solving many of the higher education issues reported by constituents.

These features help you to:

- Obtain a complete view of your institution's relationship with a constituent from prospect to lifelong learner.

- Maximize targeted recruiting effectiveness to increase conversion rates.

- Improve retention rates and simplify service delivery.

Note. This chapter provides an overview of the 360-Degree View only as it relates to CRM for Higher Education. For a complete discussion of the 360-Degree View in general, refer to the general 360-Degree View documentation.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Interactions and 360-Degree Views"

Overview of the 360-Degree View for Higher Education

In Higher Education institutions, constituent relationship management typically starts from the initial recruiting process and extends into alumni relations. During this lifecycle, a constituent might participate in various activities that result in the creation of transaction data. Higher Education business users also constantly interact with constituents while trying to recruit them, retain them, or service their requests. This interaction information is also stored in the database. In order to better manage the relationship with a constituent, all the transaction and communications data associated with the constituent must be consolidated in one place, so that all users can get a consistent view and actions can be taken based on this information.

The Constituent 360 Degree View allows specialist and generalist users within a Higher Education institution to get a summarized view of a constituent and take the desired actions such as updating a case, adding a lead, or simply providing status information to the constituent. For example, the 360 Degree View can assist agents in solving at least 60% of higher education issues without the need to navigate to various transaction pages within CRM or in Campus Solutions, thus improving user productivity.

In addition to consumers, the 360 Degree View can also display information on the companies, company contacts, and workers with which a Higher Education institution needs to interact

Consolidated, Actionable View

The Constituent 360 Degree View displays information that is retrieved from both the CRM database and Campus Solutions in real time. This information includes the following about an individual or organization being viewed:

* Biographical summary information such as name, address, and phone number.

* A summary of CRM transactions such as case, lead, event, interaction, and so forth that are associated with the individual or organization.

* Higher education specific information like recruiting and admissions data, financial aid information, transcript requests, contributor relations, affiliations, and transfer credits that apply to various stages of the constituent lifecycle.

Additionally, certain types of actions can also be performed on the individual or organization displayed from the within the 360 Degree View, such as creating new transactions like cases and leads, or navigating to a different page like the Student Service Center within Campus Solutions.

360 Degree View can display the following types of individuals and organizations:

* Individual Consumer.

- Worker.

- Contact for a Company.

- Company.

Higher Education-specific information is only displayed for persons with the Individual Consumer role.

Users of the 360 Degree View

The 360-Degree View serves as a springboard for a Higher Education business user's interactions with constituents. Both specialists and generalists can use it for different purposes while serving a constituent. For example:

- Recruiters can manage ongoing relationships with suspects, prospects, or applicants whom they are trying to recruit, and create lead or opportunity transactions for them.

- Call Center agents can answer queries they receive from prospects, students, or alumni and create cases if needed.

- Telesales agents can call on suspects or students and run a branch script that executes a survey.

- Financial Aid officers can review financial aid checklists of applicants and report status or provide advice.

- Academic advisors can review students' academic information to determine their overall standing with the institution.

- Retention managers can advise students who are at the risk of dropping out and help to retain them.

- Fundraisers seeking new donations can check whether an alumnus has a history of making donations to the institution.

Marketing Center Security and the 360 Degree View

This section describes the functionality of Marketing Center Security in the 360-Degree View. It includes the following sections:

- 360 Degree View—Secure Activity Tree for Campaigns and Events.

- Constituent 360 Degree View—Secure Recruiting Information.

360 Degree View—Secure Activity Tree for Campaigns and Events

The 360-Degree View ensures that users can only see campaigns and events that they are authorized to access. If a user is not authorized to the campaign or event, the campaign or event does not display on the Marketing Activities and Events activity nodes.

360-Degree View   History Select One... ▼

‎ ↻ Refresh | ⛃ New Search | ✉ Notification | ⛁ Correspond | ⛪ Academics | >>   Personalize

| 360-Degree View | Relationship Viewer | Tasks | Call Reports |

*Role Individual Consumer ▼   **Actions** Add Case ▼   Go

▼ **Summary**

Name Michelle Hudson	
Phone	**ID**
Home Email mhudson@yahoo.com	**Campus ID**
Address	**Current Status** Prospect

View Consumer Details

▼ **Activities**

*Date Filter 7 - View All ▼
First | Previous | Next | Last | Left | Right

📁 **Overview of - Michelle Hudson**
  📁 **Global Cases**
    ▤ Related - (0)
    ▤ Not Related - (2)
    🌐 View All
  📁 **Cases**
    📁 Authorized Cases - (0)
      🌐 View All
    📁 Unauthorized Cases - (0)
      🌐 View All
    ➕ Add Case
    🔍 Search Cases
  ⊞ † **Installed Products - (0)**
  ⊞ † **Assets - (0)**
  ⊞ **Service Orders - (0)**
  ⊞ **Change Requests - (0)**
  ⊞ **Work Orders - (0)**
  ⊞ **Defects - (0)**
  ⊞ **Leads - (0)**
  ⊞ **Opportunities - (0)**
  ⊞ **Marketing Activities - (0)**
  📁 **Events - (2)**
    🌐 View All
    🔍 Search Programs
  ⊞ † **Interactions - (6)**

† Date filter does not apply to this node

▼ **Events (View All)**

Show All Columns

Customize | Find | View All | ⤢ | 📅   First ◀ 1-2 of 2 ▶ Last

Event Name	Invited	Response	Attended	Future Event
EVENT	Yes	Registered		No
EVENT2	Yes	Waitlisted	No	No

▶ **Add Interaction Note**
▶ **Current Actions**

360 Degree View - Events

Note. In order for the Event node to appear in the 360 Degree View, users must have one of the Higher Education Agent or Administrator roles (such as HE Administrator or CS- CRM HE Level One Agent) added.

360 Degree View - Marketing Activities

Constituent 360 Degree View—Secure Recruiting Information

Only users belonging to authorized Marketing Centers can view recruiting information at the Career and Program levels. If the Marketing Center to which a user belongs is assigned to a prospect at the Career level or to any of the prospect's Programs, that user can access the prospect and view all of his or her Career and Program information in the Recruiting Section. Users can see information about a specific Program in the Program Information grid only if the Marketing Center to which the user belongs has been assigned to that Program.

If the user does not belong to any Marketing Centers to which the prospect is assigned, then the prospect's recruiting information is not displayed in the Constituent 360 Degree View.

Constituent 360 Degree View - Recruiting section

Chapter 6

Service Center for Higher Education

This chapter provides an overview of using the Service Center for Higher Education.

Note that the detailed description of the Service Center for Higher Education is provided along with the other Services-related documentation; this chapter provides only an overview of how a Higher Education user might make use of its functionality.

See Also

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Cases"

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Processing Cases"

Overview of Service Center for Higher Education

Higher Education institutions know that in order to attract and retain students and reduce service costs, having a service delivery strategy is essential.

This strategy is usually approached at a department-by-department level. It is not uncommon, for example, for the undergraduate financial aid office, the business school, and the IT support departments to have their own individual and unrelated service desks. This can mean inconsistent service delivery, inconsistent service experience, inefficient processes, and a fragmented view of the constituent. As a result, institutions must evaluate how they can streamline constituent and staff service delivery to reduce the cost to serve while providing service levels that constituents and staff demand.

Service Center for Higher Education focuses on improving agent productivity and efficiency and increasing user acceptance of lower cost service channels like self-service and email.

The Request to Resolve Process

The key business process for Service Center for Higher Education is the request to resolve process.

The request component of the process where the constituent has an inquiry that must be answered by the higher education institution. Constituents first engage the contact center by leveraging any of the channels that are available to them. They either find the information they need, or if they cannot find it, they initiate a request with the contact center. Thus, your constituents or the workforce can leverage the self service interface first.

- Constituents can create cases within self service and those cases can then be routed to the appropriate agent within the contact center to engage and help resolve the issue. They can also manage or update their cases from self service.

- Constituents can use the email channel to communicate with the institution. With this communication channel, the constituent can send email to the institution and the email, when sent to the HR mailbox, can be parsed and searched for certain keywords. Based on these keyword matches (for example, admissions status or course enrollment), the email is routed to the appropriate agent or specialist to engage and answer the inquiry.

- Using chat, constituents can access self service, initiate a chat conversation, and have a live interaction with an agent or a specialist within the institution. The chat is routed again to the most appropriate agent given the type of topic or issue in which the constituent is interested.

- The constituent can also make contact using the telephone. Service Center for Higher Education includes technologies that leverage computer telephony integration (CTI), which routes the call to the appropriate agent based on the type of issue and displays relevant constituent or case information on the agent's screen so that they can interact with the constituent immediately.

After the inquiry enters the contact center, that inquiry is directed into the higher education institution. After the agent (the person to whom the issue has been routed, based on skills-based routing) engages, then the next step the agent takes is to go to the 360–degree view of the constituent record. The 360-degree view provides a complete view of the constituent, including student and/or employee information and case history information, in a single screen.

From the 360-degree view, the agent can create a case and use Case Management tools to help diagnose and resolve the issue. After the case is closed, the system can send a case closure email message that summarizes the solution to the problem and any other information that you want to send to the constituent. Additionally, you can leverage PeopleSoft's Online Marketing solution to conduct surveys (for example, to determine customer satisfaction).

The last component analysis. If you cannot analyze information regarding the contact center performance, then cannot get the full value out of your contact center. To this end, Oracle delivers a number of analysis options: everything from basic operational reports to interactive reports and more sophisticated analytics.

The key component to keep in mind is integration. Integration provides the unique value-added functionality within the Service Desk for Higher Education. Service Center for Higher Education provides three types of integration:

- First, in order to create cases for constituents, basic constituent data must reside in Service Desk for Higher Education. This includes basic person information such as contact biographical information and high-level academic information such as Institution, Career, and Plan (and for employees: contact information and department, location and job). Constituent data can be synchronized in full for the initial load of data, and then subsequent constituent data loads in PeopleSoft Campus Solutions can be synchronized incrementally as changes occur (for example, when a constituent's address is updated).

- Second, the 360-Degree View leverages asynchronous integration to PeopleSoft Campus Solutions that fetches and displays student data alongside CRM data for a complete view of the constituent.

- Third, the Action Links and Self-Service leverage single-sign-on integration technology, enabling the user to seamlessly navigate between the Service Center for Higher Education and PeopleSoft Campus Solutions transactions.

Understanding Service Center for Higher Education

PeopleSoft CRM Service Center for Higher Education provides a self service interface that provides constituents, employees, and company contacts with access to tools that can help them solve their problems online. The combination of Campus Solutions Self-Service and Service Center Self-Service reduces service delivery costs by enabling constituents and the workforce to self-serve online. The Service Center Self-Service functionality is a complement to Campus Solutions Self-Service. Campus Solutions Self-Service enables users to perform transactions and look up information in Campus Solutions. When the constituent or worker is unable to find the information they are looking for or if they have more complex issues that require one-on-one help, they can access Service Center for Higher Education.

Users can search for answers and diagnose problems by searching the knowledgebase, viewing frequently asked questions, or using the Troubleshooting Guides. If users still cannot find the answer they are looking for, they can contact the service center directly by creating a case using self-service. Alternatively, if your institution has licensed Multichannel Communications, you can provide users the option to communicate with the service center using Chat or Email, which are integrated into the self-service and agent user interfaces. The user interface for creating a case in self-service is simplified for the occasional user. The Case provides limited access to case information and has a simple interface: the user simply fills out the case details and submits the case. You can configure the self service case can be configured to do the following when a case is submitted:

- Auto-select an agreement to set the shortest or longest response time goals.

- Auto-assign the case to the agent with the right skill set based on predefined skills-based rules.

- Automatically route the case to the agent's worklist.

The assigned agent engages with the constituent and follows the request-to-resolve business process flow discussed previously.

See and <u>Chapter 6, "Service Center for Higher Education," The Request to Resolve Process, page 109.</u>

Self Service Landing Page

When the constituent logs into self service the Welcome page is displayed. The Welcome page is a landing page that serves as a launch pad to various PeopleSoft CRM components. Clicking the Service Center link on the Welcome page launches the Service Center page.

From the Service Center page, several self-help tools are available to aid users in finding a solution to their inquiries:

- Search Solutions allows the user to search using keywords. A results grid returns a percentage relevancy score, with highest percentage displayed at the top. A solution preview allows the user to see the first few lines of the solution with drill-down capability to view the details.

- Frequently Asked Questions is a list of frequently asked constituent questions. The user can choose a topic like Academic Affairs and a business unit from the menu and click the Search button. A results grid returns the first few lines of the symptom description with drill-down to view the details.

- Another constituent self-service tool is the Troubleshooting Guide (also called a knowledge tree). The Troubleshooting Guide asks the user a series of questions. As the user answers the questions, he or she eventually arrives at an answer to the problem, or at least the guide can narrow down the focus of the problem. Troubleshooting Guides are created using the CRM Branch Scripting functionality.

Customer Selection allows a user who has multiple roles to switch roles in order to be represented as another role during case creation.

Self Service Create Case

The constituent can click the Add Case link from the Service Center page to create a self service case. Two self-service case pages are delivered in Service Center for Higher Education:

- The self-service case page for a constituent (includes students and faculty).

- The self-service case for a company contact.

The only difference between the two pages is the customer identification information in the contact details. When the self service user is a student or faculty member, the case contact detail section displays business unit, name, contact details, and site information. When self service user is company contact, the case contact detail section displays business unit, name (which is the company name), contact (which is the contact name), contact details, and site information. The problem details and attachment section are the same for all roles. The user can fill out the problem details and attach any supporting documents such as forms or documents.

All three roles have access to search for solution using keywords with the Submit and Search Solutions button at the bottom of the Case page.

Self Service Manage Case

Clicking the Manage Cases link from the Service Center page allows constituents to find their existing cases and take necessary action.

Because a self service user might have multiple roles, the user can search across roles to return all cases created by that constituent. For example, he or she could search on All My Open Cases and the search results return cases that the user created as both a faculty member and a student. Predefined searches that are delivered for all three roles include:

- All my cases.

- All my cases reported in the last 30 days.

- All my case reported in the last 7 days.

- All my open cases.

Clicking the Case ID transfers the user to view the case information and make updates, such as adding notes and attachments and closing the case if the user no longer requires help. Each time the self-service case is updated, workflow can alert the assigned agent or provider group that the case has been updated in self-service (for example, a change in contact information, the constituent searching for new solutions, or viewing solutions under consideration).

Seamless Navigation to Campus Solutions Transactions for Self-Service Users

The Service Center landing page contains two role-based links:

- Student Center.

- Faculty Center.

The former is provided for self-service students; the latter is for faculty members. The links are visible based on role: if the self-service user has both the Individual Consumer role and the Worker role, then both the Student Center link and the Faculty Center link are displayed.

Students can directly access the Campus Solutions Student Center page as well as other Campus Solutions pages directly from the Student Center link. Through single sign-on, students can seamlessly reach the self-service Student Center page, where they can perform student-related activities. Faculty members can likewise navigate to the Campus Solutions self-service Faculty Center page through the Faculty Center link to perform faculty-related activities.

Roles for Service Center for Higher Education

The following table displays the roles that have been defined for Service Center for Higher Education.

Role	User	Capabilities
IT HE Agent	SSS_ITAG	Creates and manages IT cases.
CS–CRM HE Level One Agent	SSS_HEAG1	Creates and manages Support cases. Access to biographical, admissions, academics, and contributor relations.
CS–CRM HE Level Two Agent	SSS_HEAG2	Creates and manages IT and Support cases. Access to all constituent information.
HE Administrator	SSS_HEADMIN	Performs setup and administration.
CS–CRM Recruiter	SSS_REC	Manages relationships with suspects, prospects, and applications. Access to most constituent information.
CS–CRM Financial Aid Officer	SSS_FAO	Reviews financial aid checklists and provides advice to applicants.
CS–CRM Fundraiser	SSS_FUND	Raises funds and determines whether alumni have a history of giving.

Appendix A

Populating the CS-Person Profile

This appendix provides overviews on CS-Person profile population and EIP configurations.
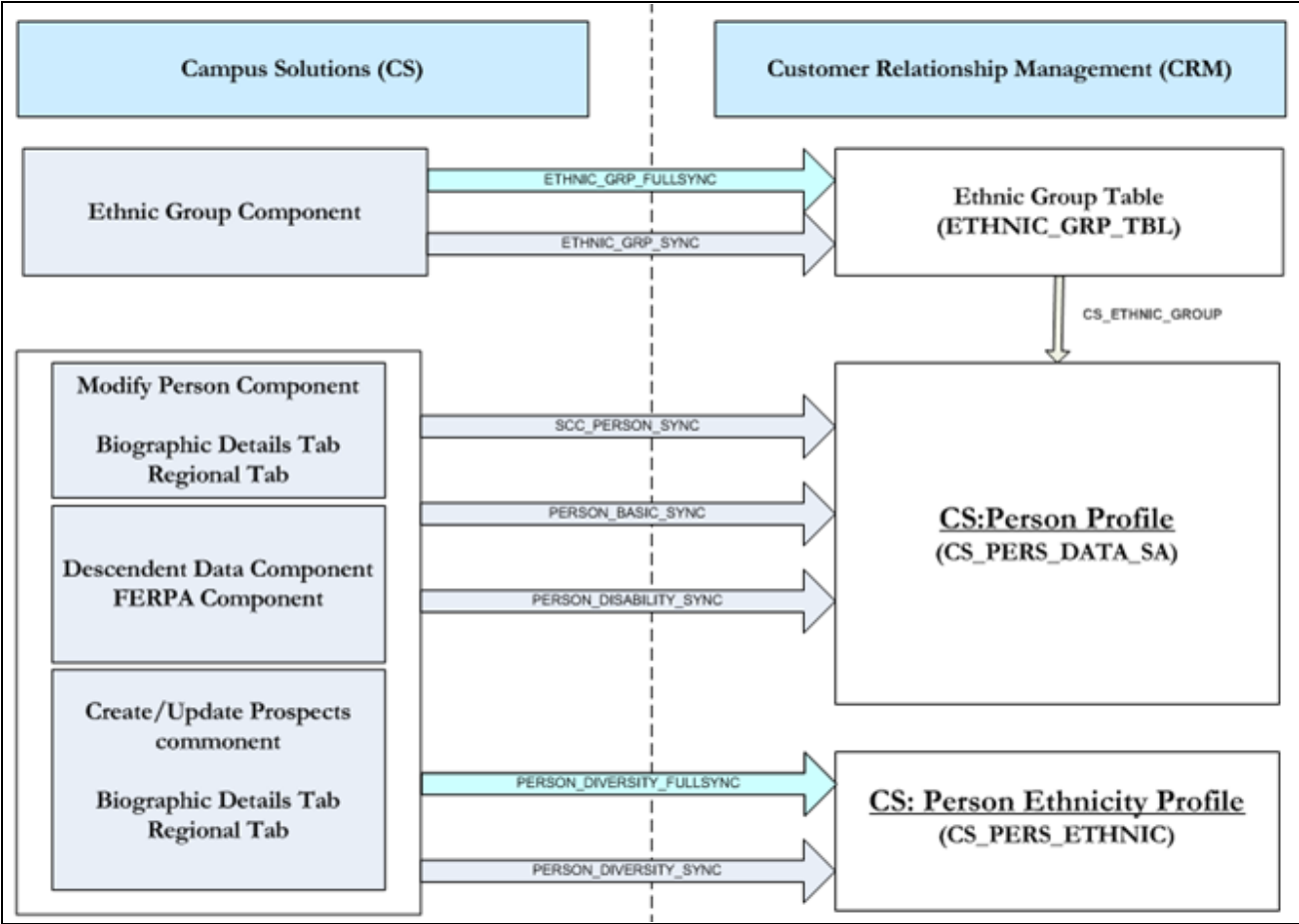
Populating the CS-Person Profile

The base table for the CS-Person profile is CS_PERS_DATA_SA. The values for the fields in this table are supplied through a number of Enterprise Integration Points (EIPs):

- PERSON_BASIC_SYNC.

- PERSON_DISABILITY_SYNC.

- PERSON_DIVERSITY_SYNC.

- SCC_PERSON_SYNC.

The subscription code for PERSON_BASIC_SYNC updates the CS-Person field values for fields published through this message. Additionally, CRM subscribes to the following EIPs to populate the rest of the fields for the CS-Person Profile and the CS-Person Ethnicity profile:

- PERSON_DIVERSITY_SYNC.

- PERSON_DISABILITY_SYNC.

- ETHNIC_GRP_SYNC.

- ETHNIC_GRP_FULLSYNC.

- PERSON_DIVERSITY_FULLSYNC.

The following figure depicts the EIPs that update the CS-Person and CS-Person Ethnic profiles.

EIPs that update the CS-Person and CS-Person Ethnic profiles

PERSON_BASIC_SYNC

The following fields in the CS-Person profile (table CS_PERS_DATA_SA) are populated through PERSON_BASIC_SYNC. If PERSON_BASIC_SYNC is bringing over a new person, a row in CS_PERS_DATA_SA is created only if the person has both an EMPLID and a value for at least one of the other fields described in the following table.

Field in CS_PERSON_DATA_SA	Field in PERSON_BASIC_SYNC
EMPLID	EMPLID
BIRTHPLACE	BIRTHPLACE
BIRTHCOUNTRY	BIRTHCOUNTRY
BIRTHSTATE	BIRTHSTATE
DT_OF_DEATH	DT_OF_DEATH
HIGHEST_EDUC_LVL	HIGHEST_EDUC_LVL

Field in CS_PERSON_DATA_SA	Field in PERSON_BASIC_SYNC
FT_STUDENT	FT_STUDENT
PER_TYPE	Left blank; this field does not exist in PERSON_BASIC_SYNC
MAR_STATUS	MAR_STATUS
MILITARY_STATUS	MILITARY_STATUS
CITIZEN_PROOF1	CITIZEN_PROOF1
CITIZEN_PROOF2	CITIZEN_PROOF2

PERSON_DISABILITY_SYNC

The PERSON_DISABILITY_SYNC EIP publishes changes to a person's disability-related information for a person. CRM subscribes to PERSON_DISABILITY_SYNC to populate the following disability related fields in CS_PERS_DATA_SA:

Field in CS_PERSON_DATA_SA	Field in PERSON_DISABILITY_SYNC
DISABLED	DISABILITY DISABLED
DISABLED_VET	DISABILITY DISABLED_VET

ETHNIC_GRP_FULLSYN and ETHNIC_GRP_SYNC

One of the fields in the CS-Person profile, CS_ETHNIC_GROUP, does not come directly through any of the EIPs. To set this field in CRM, a control table (ETHNIC_GRP_TBL) and its data from CS is required in CRM.

HCM/CS publishes ETHNIC_GRP_FULLSYNC to distribute all the data for this table and ETHNIC_GRP_SYNC for any incremental data changes.

In CRM, the table ETHNIC_GRP_TBL (identical to the one in HCM/CS) exists and subscribes to ETHNIC_GRP_FULLSYNC and ETHNIC_GRP_SYNC messages to populate it.

Initially, the Full Sync should be used to move all the data for ETHNIC_GRP_TBL from HCM/CS to CRM. Any addition/modification later are synchronized through the incremental sync.

PERSON_DIVERSITY_SYNC

This section discusses:

• Updating the CS-Person profile.

• Updating the CS-Person Ethnicity profile.

Updating the CS-Person Profile

The PERSON_DIVERSITY_SYNC is designed by HCM/CS to publish any changes made to a person's diversity-related information. CRM subscribes to PERSON_DIVERSITY_SYNC (VERSION_2) to populate the Diversity (Ethnicity) related fields in CS_PERS_DATA_SA that are shown in the following table:

Field in CS_PERSON_DATA_SA	Field in PERSON_DIVERSITY_SYNC	Comments
CS_WAIVE_DATA_PROT	WAIVE_DATA_PROTECT	
CS_CAN_ABORIGINAL	CAN_ABORIGINAL	
CS_CAN_VIS_MINOR	CAN_VISBL_MINORITY	
CS_ETHNIC_GROUP	To populate this field, use the ETHNIC_GROUP_CD and SETID fields coming through this message to retrieve the values of ETHNIC_GROUP or ETHNIC_CATEGORY	To populate this field, use the ETHNIC_GROUP_CD and SETID fields to retrieve the value for CS_ETHNIC_GROUP: If SETID is *USA,* retrieve the value of field ETHNIC_GROUP from ETHNIC_GRP_TBL to set CS_ETHNIC_GROUP. If SETID is *Not USA,* retrieve the value of field ETHNIC_CATEGORY from ETHNIC_GRP_TBL to set CS_ETHNIC_GROUP. (Note: General effective dated logic applies. Based on Effective Date, the ETHNIC_GRP_CD/SETID map to one and only one ETHNIC_GROUP and ETHNIC_CATEGORY

Updating the CS-Person Ethnicity Profile

CRM subscribes to PERSON_DIVERSITY_SYNC and publishes all the fields that are required to populate the CS-Person Ethnicity profile (Table CS_PERS_ETHNIC). The subscription code updates the CS-Person Ethnicity profile. The following table describes the field mapping:

Field in CS_PERS_ETHNIC	Field in PERSON_DIVERSITY_SYNC	Comments
BO_ID	Use EMPLID to derive BO_ID	The EIP brings EMPLID, which is used to identify the BO_ID in CRM.
CS_ETHNIC_GROUP_CD	ETHNIC_GROUP_CD	
CS_ETHNIC_SETID	SETID	
PRIMARY_INDICATOR	PRIMARY_INDICATOR	

Field in CS_PERS_ETHNIC	Field in PERSON_DIVERSITY_SYNC	Comments
HISP_LATINO	Set to *Y* or *N* based on ETHNIC_GROUP and ETHNIC_CATEGORY	Based on ETHNIC_GROUP_CD and SETID fields, retrieve the value of ETHNIC_GROUP or ETHNIC_CATEGORY For SETID *USA,* if the ETHNIC_GROUP = *3* or *D,* set HISP_LATINO to *Y,* otherwise set it to *N.* For SETID *<>USA,* if the ETHNIC_CATEGORY = *3,* set HISP_LATINO to *Y,* otherwise set it to *N.*

Because HCM/CS publishes PERSON_DIVERSITY_FULLSYNC, CRM subscribes to this full sync as well. Initially, it is used to move all the data for the CS-Person Ethnicity profile from HCM/CS to CRM, and then any incremental changes is synchronized through PERSON_DIVERSITY_SYNC. Information about one of the fields in CS-Person profile (field CS_ETHNIC_GROUP) also comes through the PERSON_DIVERSITY_FULLSYNC and PERSON_DIVERSITY_SYNC EIPs.

The following table describes the CS-Person profile field mappings with the respective Full Sync and Incremental Sync messages:

Field Name	Full Sync Source	Incremental Sync Source
BO_ID	Identified based on EMPLID	Identified based on EMPLID
RA_ATTRIB_SEQ	Sequence number	Sequence number
EMPLID	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
BIRTHPLACE	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
BIRTHCOUNTRY	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
BIRTHSTATE	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
DT_OF_DEATH	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
HIGHEST_EDUC_LVL	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
FT_STUDENT	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC

Field Name	Full Sync Source	Incremental Sync Source
MAR_STATUS	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
MILITARY_STATUS	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
CITIZEN_PROOF1	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
CITIZEN_PROOF2	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_BASIC_SYNC
CS_CAMPUS_ID	CS_PERS_DATA_EXTEND_FULL SYNC	SCC_PERSON_SYNC
CS_DEATH_CERT_NBR	CS_PERS_DATA_EXTEND_FULL SYNC	SCC_PERSON_SYNC
CS_FERPA	CS_PERS_DATA_EXTEND_FULL SYNC	SCC_PERSON_SYNC
CS_PLACE_OF_DEATH	CS_PERS_DATA_EXTEND_FULL SYNC	SCC_PERSON_SYNC
DISABLED	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_DISABILITY_SYNC
DISABLED_VET	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_DISABILITY_SYNC
CS_WAIVE_DATA_PROT	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_DIVERSITY_SYNC
CS_CAN_ABORIGINAL	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_DIVERSITY_SYNC
CS_CAN_VIS_MINOR	CS_PERS_DATA_EXTEND_FULL SYNC	PERSON_DIVERSITY_SYNC
CS_ETHNIC_GROUP	PERSON_DIVERSITY_FULLSYNC	PERSON_DIVERSITY_SYNC

The following table describes the CS-Person Ethnicity profile field mappings with the respective Full Sync and Incremental Sync messages:

Field Name	Full Sync Source	Incremental Sync Source
BO_ID	Identified based on EMPLID	Identified based on EMPLID
RA_ATTRIB_SEQ	Sequence number	Sequence number

Field Name	Full Sync Source	Incremental Sync Source
CS_ETHNIC_GRP_CD	PERSON_DIVERSITY_FULLSYNC	PERSON_DIVERSITY_SYNC
CS_ETHNIC_SETID	PERSON_DIVERSITY_FULLSYNC	PERSON_DIVERSITY_SYNC
HISP_LATINO	PERSON_DIVERSITY_FULLSYNC	PERSON_DIVERSITY_SYNC
PRIMARY_INDICATOR	PERSON_DIVERSITY_FULLSYNC	PERSON_DIVERSITY_SYNC

EIP Configurations

This section discusses:

•   Incremental sync

•   Full data publishing (full sync)

Incremental Sync

The following EIPs must be set up in both the CRM and HCM/CS environments in order to successfully publish Person profile data via incremental sync:

1. PERSON_BASIC_SYNC

2. SCC_PERSON_SYNC

3. PERSON_DIVERSITY_SYNC

4. PERSON_DISABILITY_SYNC

5. ETHNIC_GRP_SYNC

Full Data Publishing (Full Sync)

The following EIPs must be set up in both CRM and HCM/CS environments in order to successfully publish Person profile data via full syncs.

1. PERSON_DIVERSITY_FULLSYNC

2. ETHNIC_GRP_FULLSYNC

Note. The ETHNIC_GRP_FULLSYNC EIP must be run before publishing any other incremental or full sync EIPs mentioned in this section. ETHNIC_GRP_FULLSYNC brings ETHNIC_GRP_TBL data, which contains setup information for ethnic group from HCM/CS. Because of this, ETHNIC_GRP_FULLSYNC is a prerequisite for all other EIPs described in this section.

Full Data Publishing Sequence

The following table shows the order in which full sync messages must be published.

EIP Name	Functionality	Prerequisite	When to Run
ETHNIC_GRP_FULLSYNC	Brings ETHNIC_GRP_TBL setup date from HCM/CS to CRM	None	When setup data for Ethnic Group is loaded.
PERSON_BASIC_FULLSYNC	Brings Person data from HCM/CS	ETHNIC_GROUP_FULLSYNC	If one or more persons do not exist in CRM, then publish PERSON_BASIC_FULLSYNC to bring all these persons from HCM/CS into CRM.
CS_PERSON_DATA_EXTEND_FULLSYNC	Brings person profile, academic history, extracurricular data, academic interest data, service indicator, and so on. Prerequisite:	PERSON_BASIC_FULLSYNC. Person must exist in CRM in order to successfully load Person profile data.	With default handler GEN_UPG_HANDLER_17382: to delete and reload data in all of the following tables: 1. PS_CS_PERS_DATA_SA 2. PS_CS_SRVC_IND_DAT 3. PS_CS_INTERESTS 4. PS_CS_EXCR_ACTVTY 5. PS_CS_ACAD_HISTORY With temporary handler *LoadPersonProfile*: To delete and reload data in CS_PERS_DATA_SA table only.
PERSON_DIVERSITY_FULLSYNC	Bring person ethnic data into CRM	ETHNIC_GRP_FULLSYNC and CS_PERS_DATA_EXTEND_FULLSYNC must be run before publishing PERSON_DIVERSITY_FULLSYNC.	To load person ethnic information. This is the last full data publish in the sequence.

Index

Symbols

A

B

C

E

I

L

M

P

R

S

suspects and prospects
    creating manually 52

T

test results 17
test scores
    importing 13
Test Scores page 60