



The California State University
Common Management Systems

Campus Solutions

HCM 9.0 Upgrade Campus Readiness Session



Campus Community Module

Presented by: Kee Chang

Narrated by: DaMonique Sampson

August 2010

Agenda

- Population Selection
- Population Update
- Service Indicators
- Student Groups
- External Organizations
- Self Service

Overview

- Selects a group of EMPLIDs and/or Org IDs for use within a process
- Population Selection (Pop Select) is configurable and allows the use of three selection tools:
 - PS Query
 - External Files
 - Equation Engine

Selection Tools

- **PS Query** - Most commonly used population selection tool
 - SQL may be written in Query Manager to select a population based on available records
 - Requires the use of Bind Records
 - Results may be previewed prior to running the process
- **External File Loads** - Requires File Mapping to be set up prior to uploading a file
 - This is useful for loading files from other departments
 - Results may be previewed prior to running the process
- **Equation Engine** - Used in more complex circumstances, such as calculations or conditional statements; commonly used in Student Financials and Financial Aid
 - Requires the use of Bind Records
 - Results may be previewed prior to running the process

Module	Delivered Processes
AA	Advisement Report
AD	Application Delete by Batch
AD	Prospect Delete by Batch
CC	3C Engine
CC	Mass User Security Replacement
CC	Population Selection Update
CC	Process Student Groups
CC	Service Indicator Person Mass Release
CC	Service Indicator Organization Mass Release
CC	Service Indicator Person Mass Assign
CC	Service Indicator Organization Mass Assign
CR	Audience Criteria
FA	Aid Year Activate
FA	Mass Packaging Select
FA	Select Students for Need Summary Validation
FA	Select Students for Repackaging
FA	Process SAP
FA	Student Financials External Award Feed
SF	Mass Contract Select (Payment Plan & Third Party)
SF	Mass Contract Select for Cancellation (Payment Plan & Third Party)
SR	Process Transcripts

Find Bind Records in Query Manager

Navigation: Main Menu > reporting Tools > Query > Query Manager.

- Bind Records must be included in all Equations and Queries used for Population Selection
- Bind records are predefined by Oracle— they can be looked up via Query manager using record name = %BND or = %BIND
- Each bind record is linked to a delivered process which contains the option for population selection
- Delivered queries and equations provide examples of how to write Bind Records for your process

Find an Existing Record

Search By: Record Name v begins with %BND

Search [Advanced Search](#)

Search Results

Record	Customize	Find	View All	First	1-20 of 59	Last
Recname	Add Record			Show Fields		
GPUS_BND_ASSIGN - Bond Assignment Data	Add Record			Show Fields		
GPUS_BND_DATA - Bond Processing Data	Add Record			Show Fields		
GPUS_BND_TBL - Savings Bond Table	Add Record			Show Fields		
GPUS_BND_WA - Bond Processing Writable Array	Add Record			Show Fields		
SAA_RPTRQST_BND - Pop Select AA Report Bind	Add Record			Show Fields		
SAD_APP_DEL_BND - Application Delete Bind	Add Record			Show Fields		
SAD_PRS_DEL_BND - Prospect Pop Select Bind View	Add Record			Show Fields		
SCCPU_APRCR_BND - Bind for Adm App Recr Cat	Add Record			Show Fields		
SCCPU_ASGOD_BND - Pop Update Bind for ASG Orig D	Add Record			Show Fields		
SCCPU_CARTM_BND - Bind for STDNT_CAR_TERM	Add Record			Show Fields		
SCCPU_EQUTN_BND - Bind for STDNT_EQUTN_VAR	Add Record			Show Fields		
SCCPU_FATRM_BND - Bind for STDNT_FA_TERM	Add Record			Show Fields		
SCCPU_ISIRC_BND - Bind for ISIR Control	Add Record			Show Fields		
SCCPU_PELOD_BND - Pop Upd Bind for Pell Org Dtl	Add Record			Show Fields		
SCCPU_PERS_BND - Bind for PERS_INST_REL	Add Record			Show Fields		
SCCPU_PRSCR_BND - Bind for ADM_PRSPCT_CAR	Add Record			Show Fields		
SCCPU_SLCST_BND - Bind for SFA_SLC_STUDENT	Add Record			Show Fields		
SCCPU_STDCR_BND - Bind for STDNT_CAREER	Add Record			Show Fields		
SCCPU_STDNT_BND - Bind for Population Update	Add Record			Show Fields		
SCC_BND_AFL - All Pop Selection Bind Record	Add Record			Show Fields		

Example - Mass Assign Service Indicators

Common Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Assign

- Depending on the Tool selected, links will appear to aid in the Tool creation
 - External File: Upload File/Create File Mapping
 - Equation Engine: Create Equation
 - PS Query: Launch Query Manager

Mass Assign

Run Control ID: nl

[Report Manager](#) [Process Monitor](#)

[Run](#)

Population Selection

Selection Tool: External File

Attached File:

[Upload File](#)

[Delete File](#)

[View File](#)

File Mapping:

[Create File Mapping](#)

Population Selection

Selection Tool: Equation Engine

Equation Name:

[Create Equation](#)

Population Selection

Selection Tool: PS Query

Query Name:

[Launch Query Manager](#)

Overview

- Population update allows values to be updated in selected fields
 - The fields selected are predefined by PeopleSoft
 - Most are related to Financial Aid
- Population Update is configurable and uses the Population Selection Tools
 - PS Query
 - External Files
 - Equation Engine

Overview

- Records currently available for Population Update:
 - Admission Application Recruiting Category (ADM_APPL_RCR_CA)
 - Packaging Status Summary (STDNT_AID_ATRBT)
 - Relations with Institution (PERS_INST_REL)
 - Student Equation Variables (STDNT_EQUTN_VAR)
 - Student FA Term (STDNT_FA_TERM)
 - Student Packaging Variables (STDNT_PKG_VAR)
 - Tuition Calculation (STDNT_CAR_TERM)
 - Student Career (STDNT_CAREER)

Security

Navigation: Setup SACR > Security > Secure Student Administration > User ID > Population Update Security

Population Update Security

User ID: NLOUIE One Foreign,Plan Tester

Record (Table) Name	Description	Access Code		
ADM_APPL_RCR_CA	Admission Application Recruitment Category	Read/Write	+	-
ADM_PRSPCT_CAR	Admission Prospect Career	Read/Write	+	-
ISIR_CONTROL	ISIR Internals/Control Data	Read/Write	+	-
INAS_CALC_RECS	Records needing INAS Institutional Calculation	Read/Write	+	-
PELL_ORIG_DTL	PELL Origination Detail	Read/Write	+	-
PERS_INST_REL	Person Relationships with Institution	Read/Write	+	-
SFA_ASG_ORG_DTL	ACG/SMART Origination Detail	Read/Write	+	-
SFA_SLC_STUDENT	SLC Student Data Table	Read/Write	+	-
STDNT_AID_ATRBT	Packaging Status Summary	Read/Write	+	-
STDNT_CAREER	Student Career	Read/Write	+	-
STDNT_EQUTN_VAR	Student Equation Variables	Read/Write	+	-
STDNT_FA_TERM	Student FA Term	Read/Write	+	-
STDNT_PKG_VAR	Student Packaging Variables	Read/Write	+	-

- Security for Population Update is granted by User ID
- The records available for update are predefined by Oracle

Identify the Fieldnames for Update

Navigation: Setup SACR > System Administration > Utilities > Population Update > Population Update Setup

- Once security is granted to the record, the fields available for update are displayed in a dropdown list
- Select the fields to be updated during the Population Update process, adding more rows as necessary
 - All fields may be selected; the actual fields updated are indicated on the process run control

The screenshot shows the 'Population Update Setup' window. At the top, the breadcrumb navigation is: Favorites | Main Menu > Set Up SACR > System Administration > Utilities > Population Update > Population Update Setup. The main title is 'Population Update Setup'. Below the title, there is a section 'Fields Available for Update'. Under this section, the 'Record (Table) Name' is 'STDINT_FA_TERM' with the description 'Student FA Term'. There are two radio buttons: 'Insert New EFFDT row?' (selected) and 'Update Current EFFDT row?'. Below this, there is a table with two columns: 'Field Name' and 'Field Long Name'. The table has one row with 'BUDGET_REQUIRED' in the 'Field Name' column and 'FA_STATS_CALC_REQ' in the 'Field Long Name' column. The 'Field Name' column has a dropdown arrow next to 'BUDGET_REQUIRED'. To the right of the table, there are two buttons: a plus sign (+) and a minus sign (-). The table and the plus/minus buttons are highlighted with a red box.

Field Name	Field Long Name
BUDGET_REQUIRED	FA_STATS_CALC_REQ

Population Update Run Control Page

Navigation: Setup SACR > System Administration > Utilities > Population Update > Population Update Process

Population Selection Update

Run Control ID: 08 [Report Manager](#) [Process Monitor](#) [Run](#)

Select Record/Field for Update

*Record (Table) Name:

Institution: CSU Semester University Term:

Academic Career:

Error Reporting Selection

Report Error Messages: Do Not Report Messages: Report All Messages:

Population Selection

Selection Tool:

Query Name: [Lookup Query Browser](#)

Select Fields to Update

Field Name	Field Value		
<input type="text"/>	<input type="text"/>		
Recruitment Sub-Category	<input type="text" value="High"/>		

Select Fields to Update (dropdown menu):

- County
- Eligible to Enroll
- External Org ID
- Form of Study
- Override Billing Units
- Projected Bill Units
- Study Agreement
- Tuition Calc Required

Overview

- External Organization Service Indicators
- Term Begin/End or Date range for Active Service Impact
- Mass Assign/Release via population selection
- Role-based security
- Service Indicator Audit

Service Indicator Codes

Setup SACR > Common Definitions > Service Indicators > Service Indicator Table

- New Service Indicator Attributes have been added in HCM 9.0

The screenshot shows the 'Service Indicator Codes' configuration page. The breadcrumb trail is: Favorites > Main Menu > Set Up SACR > Common Definitions > Service Indicators > Service Indicator Table. The page has two tabs: 'Service Indicator Codes' (selected) and 'Service Indicator Reasons'.

Academic Institution: CSUSU CSU Semester University Copy

Service Indicator Code: R01

Service Indicator Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1901 *Status: Active

*Description: Prevent all enrollment actions

Short Description: No enroll

Default Reason: Set No Default

Attributes

Use with: Person Organization Positive Service Indicator Default Start Term (0000)

Display Deceased Label Display in Self-Service Default Start Date

Service Indicator Impact Find | View All First 1 of 1 Last

*Service Impact: CENR Block All Enrollment Actvy

Term Category: [dropdown]

Description: All enrollment activity is blocked.

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

Service Indicator Codes | Service Indicator Reasons

Service Indicator Reasons

Setup SACR > Common Definitions > Service Indicators > Service Indicator Table

Service Indicator Display

Service Indicator Reasons

Academic Institution: CSUSU CSU Semester University

Service Indicator Code: R01 Prevent all enrollment actions

Effective Date: 01/01/1901 Status: Active Positive Service Indicator

Reason Details

*Reason Code: ADM D Set As Default **Secure Display by Role**

*Description: Admissions documents missing

Short Description: Adm Docs

*Department: 1100 *Reference: Dept

Position Number:

Description: Final documents were due by July 15th, 2010. You may not register until we receive your final documents. Please contact Enrollment Services for assistance (562) 555-1212

Service Indicator Display

Academic Institution: CSUSU CSU Semester University

Service Indicator Code: R01 Prevent all enrollment actions

Service Ind Reason: ADM D Admissions documents missing

*Role Name	Description
1 Administrator_Role	Administrator Role

OK Cancel Apply

Save Return to Search Notify Add Update/Display Include History Correct History

[Service Indicator Codes](#) | [Service Indicator Reasons](#)

Term Begin/End – Date Range

Setup SACR > Common Definitions > Service Indicators > Service Impact Table

- Service indicators stay on an account until removed
- Impacts may end based on term, date, or both
- Term: Impact is disregarded at the completion of the end term (defined on Add Service Indicator page)
- Date: Impact is disregarded at the completion of a defined end date
- Both, Term and Date, may be combined to provide an even more specific range

The screenshot shows the 'Service Impact Table' interface. At the top, the breadcrumb trail is: Favorites | Main Menu > Set Up SACR > Common Definitions > Service Indicators > Service Impact Table. Below this, the title 'Service Impact Table' is displayed. The main content area shows the following details:

- Institution: CSUSU CSU Semester University
- Service Impact: NOBIL

A 'Service Impact Details' pop-up window is open, showing the following fields:

- *Effective Date: 01/01/1901
- *Status: Active
- *Description: Do not bill
- Short Description: NoBill

The 'Basis of Impact' section is highlighted with a red box and contains the following options:

- Term
- Date
- Positive Service Impact
- System Function

At the bottom of the interface, there is a toolbar with the following buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.

Mass Assign

Campus Community > Service Indicators > Person > Mass Assign

- Uses Population Selection
- Effective Period can be set by Term, Date, or both

Mass Assign

Run Control ID: cms [Report Manager](#) [Process Monitor](#) Run

Population Selection

Selection Tool: [Launch Query Manager](#) [Preview Selection Results](#)

Query Name:

Service Indicator Data

*Institution:

*Service Indicator Code: Do not Cancel Enrollment

Reason: SF Administrative Adjustments Use System Date

Effective Period

Start Term: Fall 2009 End Term: Spring 2010

Start Date: End Date:

Assignment Details

*Department: Office of the VP,Adm & Finance

Reference:

Amount: Currency Code: Dollar

Contact Information

Contact ID:

Placed Person ID: Contact Person:

Placed By:

Comments

Mass Release

Campus Community > Service Indicators > Person > Mass Release

Mass Release

Run Control ID: cms

[Report Manager](#)

[Process Monitor](#)

Run

Population Selection

Selection Tool:

PS Query



Query Name:

QA_CS_CC_PS_SRVCIND_PERS



[Launch Query Manager](#)

[Preview Selection Results](#)

Service Indicator Data

*Institution

CSU Semester University



*Service Indicator Code

S01



Do not Cancel Enrollment

Reason

SFADM



SF Administrative Adjustments

Effective Period

Start Term

2094



Fall 2009

End Term

2102



Spring 2010

Start Date

09/01/2010



End Date

05/31/2011



Manage Service Indicators

Campus Community > Service Indicators > Person > Manage Service Indicators

- Manually Add New Service Indicator
- Manually Remove Service Indicator
- Update Existing Service Indicator

Manage Service Indicators

James Bond

004359613

Display:

Effect

All



Institution

CSU Semester University



[Refresh](#)



[+ Add Service Indicator](#)

Service Indicator Summary

Customize | Find | View All | |

First 1 of 1 Last

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
S01	Do not Cancel Enrollment	SF Administrative Adjustments	CSUSU	2094	Fall 2009	2102	Spr 2010	09/01/2010	05/31/2011

[+ Add Service Indicator](#)

Manage Service Indictors

Campus Community > Service Indicators > Person >
Manage Service Indicators

- Add Indicator
- Effective Period can be based on Term , Date or both

Add Service Indicator

James Bond 004359613

*Institution: CSU Semester University

*Service Indicator Code: Do not Cancel Enrollment

*Service Ind Reason Code: SF Administrative Adjustments

Description:

Effect: Positive

Effective Period

Start Term: Fall 2009 End Term: Spr 2010

Start Date: End Date:

Assignment Details

*Department: Office of the VP,Adm & Finance

Reference:

Amount: Currency:

Contact Information

Contact ID: Contact Person:

Placed Person ID: Placed By:

Comments

Services Impacted

Impact	Description	Basis - Date	Basis - Term	Term Category
1 NONE	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Service Indicator Date Time: 07/30/2010 10:06:19AM

User ID: SACMSUSR Bond,James CC

Manage Service Indicators

Campus Community > Service Indicators > Person >
Manage Service Indicators

- Edit Service Indicator
- New Release Button replaces +/- button

Edit Service Indicator

James Bond 004359613 Release

*Institution: CSU Semester University

*Service Indicator Code: Do not Cancel Enrollment

*Service Ind Reason Code: SF Administrative Adjustments

Description:

Effect: Positive

Effective Period

Start Term: Fall 2009 End Term: Spr 2010

Start Date: End Date:

Assignment Details

*Department: Office of the VP,Adm & Finance

Reference:

Amount: Currency:

Contact Information

Contact ID: Contact Person:

Placed Person ID: Placed By:

Placed Method: Manual

Placed Process: Release Process:

Comments

Services Impacted

Impact	Description	Basis - Date	Basis - Term	Term Category
1 NONE	None	☐	☑	

Service Indicator Date Time: 07/30/2010 10:06:19AM

User ID: SACMSUSR

OK
Cancel
Apply

Audit Service Indicators

Campus Community > Service Indicators > Person > Audit Service Indicators

- Search by any service indicator field
- Audit page tracks all service indicator activity

Audit Service Indicators

Service Indicator Audit Search

Search Reset

ID:

Last Name: First Name:

National ID: Campus ID:

Service Indicator Code:

Reason:

Institution: CSU Semester University

Start Term: End Term:

Start Date: End Date:

Department:

Assigned By:

Placed Process: Release Process:

User ID:

Service Indicator Date: Service Indicator Time:

Audit Date: Audit Time:

Action:

Audit Service Indicators

Service Indicator Audit Search

Search Results Customize | Find | View All | First 1-2 of 2 Last

Assignment	ID Data	Date/Time				
ID	Name	Service Indicator Code	Start Term	Start Date	Action	
1	004359613 Bond,James CC	S01	2094	2010-09-01	A	
2	004359613 Bond,James CC	S01	2094	2010-09-01	D	

Navigation: Main Menu > Records and Enrollment > Career and Program Information > Process Student Groups

Favorites | Main Menu > Records and Enrollment > Career and Program Information > Process Student Groups

Process Student Groups

Run Control ID: DS [Report Manager](#) [Process Monitor](#) [Run](#)

Population Selection

Population Selection

Selection Tool:

Query Name:

Student Group Data

*Academic Institution:

*Student Group:

*Effective Date:

*Effective Status:

Comment:

Student Override

Student Override

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Navigation: Main Menu > Set Up SACR > Security > Secure Student Administration > User ID > Student Group Security

Favorites | Main Menu > Set Up SACR > Security > Secure Student Administration > User ID > Student Group Security

Student Group Security

User ID: SACMSUSR Name:

Institution: CSUSU CSU Semester University

Security Settings					
Customize Find View All [Print] [Grid]					
First [Left Arrow] 1-2 of 2 [Right Arrow] Last					
*Student Group		Inquiry Indicator	Update Indicator		
ER01	President's Scholars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
ER02	Student Athletes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Overview

- Functionally, the Organization pages remain similar to 8.9
- Major changes to External Organization underlying tables:
 - Location and attribute fields were removed from the EXT_ORG_TBL
 - EXT_ORG_TBL_ADM table was added
 - Effective Dates were added to the ORG_LOCATION, ORG_CONTACT and ORG_DEPT tables

Self Service Personal Data Summary Options





Set Up SACR > Common Definitions > Self Service > Personal Data Summary Options

Personal Data Summary Options

Last Update DateTime: 06/23/10 3:04:44 User ID: JBLACK
Description:


Contact Information

Type of addresses to display


Address Box 1 (left) <input type="text" value="MAIL"/>  Mailing	Address Box 2 (right) <input type="text" value="HOME"/>  Home
Address Box 1 Link Label <input type="text" value="Mailing Address"/>	Address Box 2 Link Label <input type="text" value="Home Address"/>
<input checked="" type="checkbox"/> Display Phone Type: <input type="text" value="Main"/> 	<input checked="" type="checkbox"/> Display E-mail Type: <input type="text" value="On-Camp"/> 
Phone Link Label <input type="text" value="Main Phone Number"/>	Email Link Label <input type="text" value="Campus E-mail"/>

Privacy settings link:

Holds Section

Show:  holds at a time
 Display monetary value

To Do List Section

Show:  To Do's at a time

Self Service Personal Data Summary Options

Navigation: Set Up SACR > Common Definitions > Self Service > Personal Data Summary Options

Personal Data Summary Options

Last Update DateTime: 06/23/10 3:04:44 User ID: JBLACK

Description:

Contact Information

Type of addresses to display

Address Box 1 (left): <input type="text" value="MAIL"/> Mailing	Address Box 2 (right): <input type="text" value="HOME"/> Home
Address Box 1 Link Label: <input type="text" value="Mailing Address"/>	Address Box 2 Link Label: <input type="text" value="Home Address"/>
<input checked="" type="checkbox"/> Display Phone Type: <input type="text" value="Main"/>	<input checked="" type="checkbox"/> Display E-mail Type: <input type="text" value="On-Camp"/>
Phone Link Label: <input type="text" value="Main Phone Number"/>	Email Link Label: <input type="text" value="Campus E-mail"/>
Privacy settings link: <input type="text"/>	

Holds Section

Show: holds at a time

Display monetary value

To Do List Section

Show: To Do's at a time

