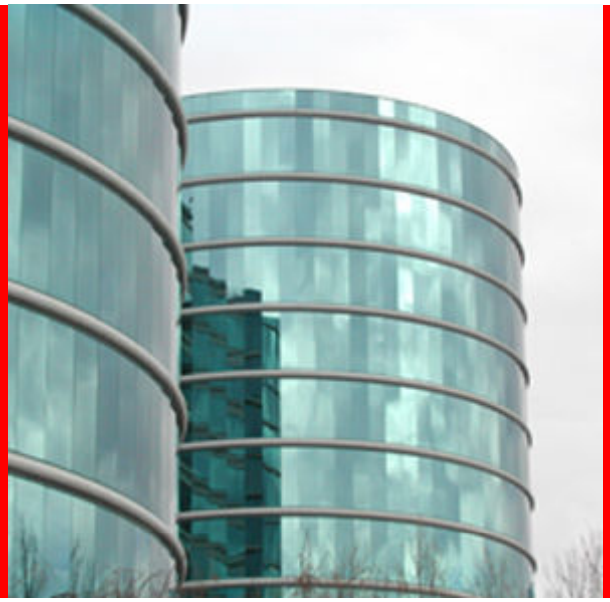
ORACLE®



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Unleashing the Power of Pop Update for Student Financials
Alliance 2009, Session #26220

Vera Walker and Sandra Pearson
Principal Product Manager

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Agenda/Contents

- What is the Pop Select Utility
- Update Service Indicators using query (Self Service PPL)
- Update student groups using query(billing)
- Update Equation Variables using file (Tuition Calc)
- Update STDNT_CAR_TERM using an equation (tcalc req flag)

Population Selection/Population Update

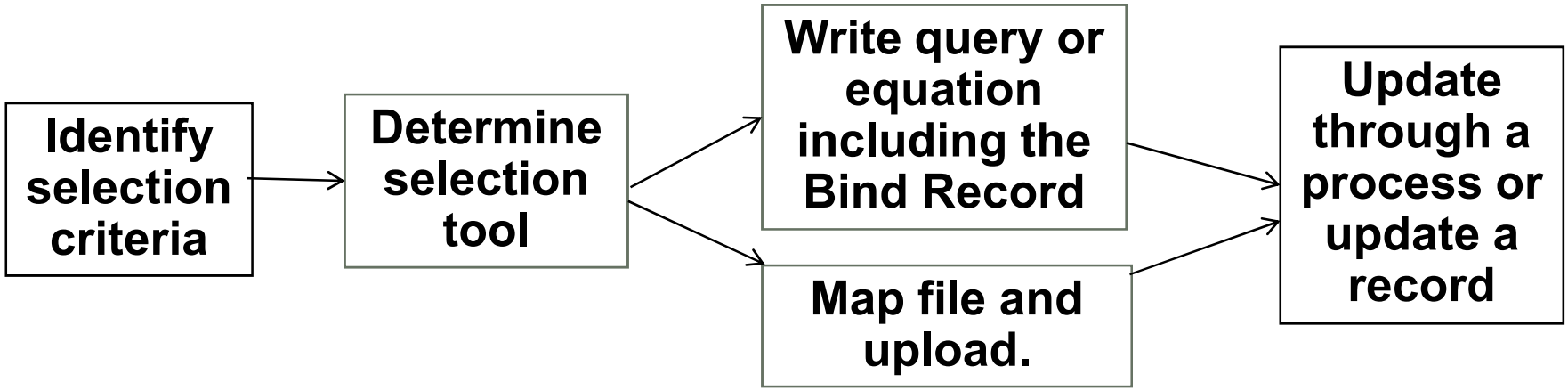
- Population Selection is a tool that allows for an institution to customize a selection of students for processing. Population Selection is incorporated into a process such as Adding/Deleting students from Student Groups.

- Population Update is a delivered process, utilizing population selection, which updates specific field values in tables delivered as part of population update.

Population Select Utility

Population Selection enables you to use different tools to select Emplids for a process. PS delivered the following selection tools:

- *PS Query*
- *Equation Engine*
- *External File*



Navigation

- Population Selection Utilities are defined:

  Setup SACR>System Administration>Utilities

  - *Define Selection Tools*
  - *Application Specific Context*
  - ***Context Definition***
  - *Equation to Context Mapping*

- Population Update is defined:

  Setup SACR>System Administration>Utilities

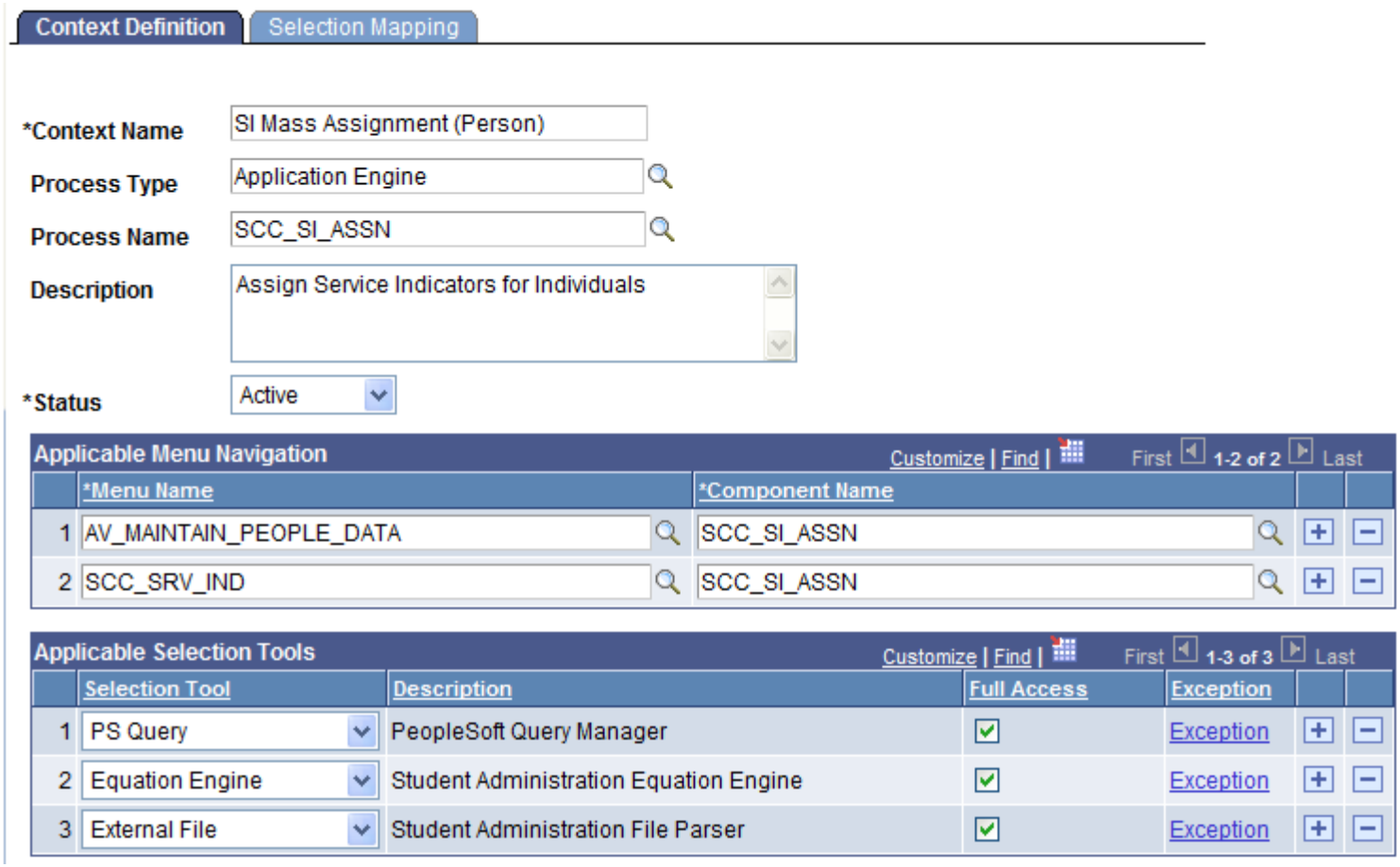
  - *Population Update Setup*
  - *Population Update Process*

Population Update Security

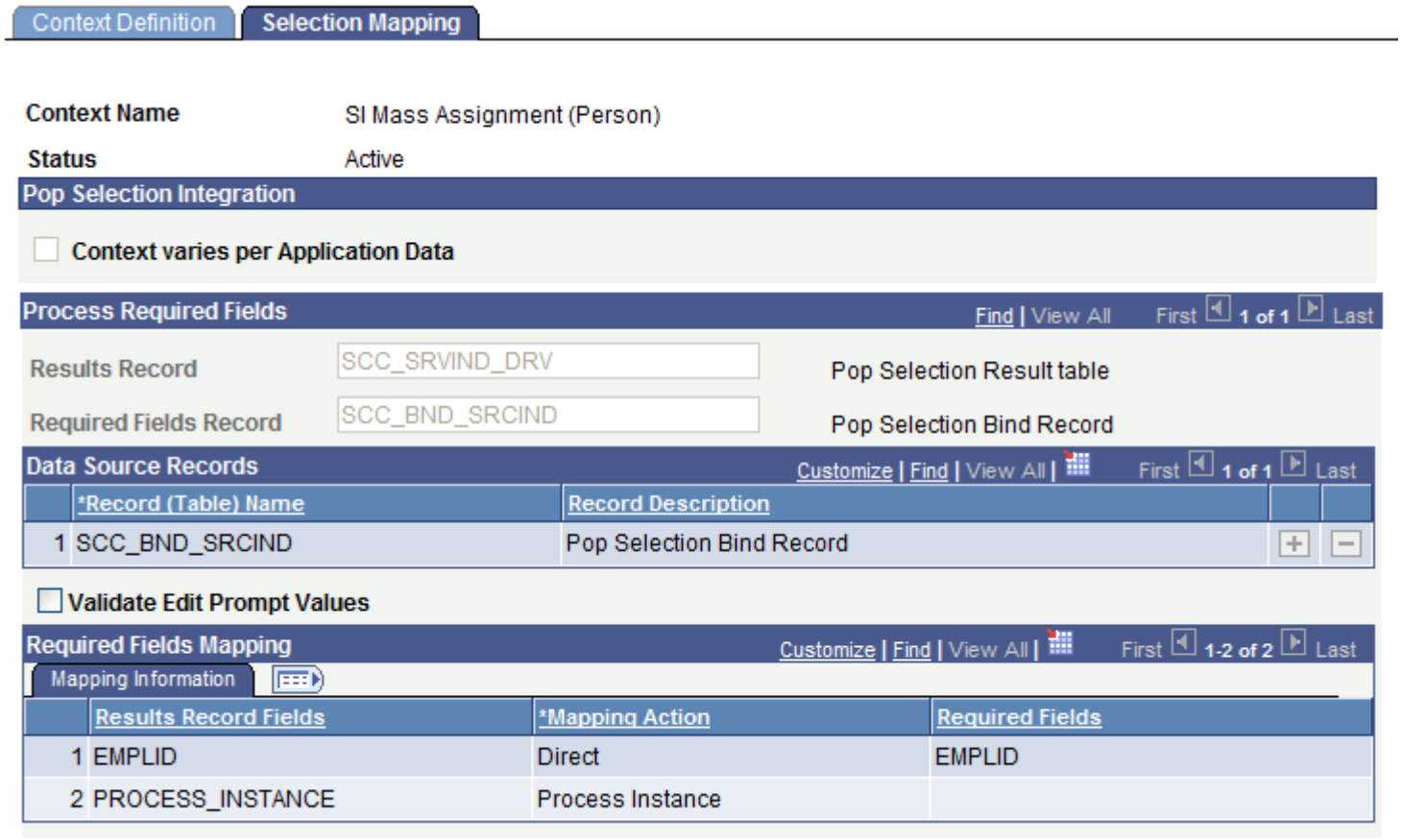
Population Update Security:

- For each Record (table): Setup SACR>Security>Secure Student Administration>User ID>Population Update Security
- For each Field: Setup SACR>System Administration>Utilities>Population Update Setup
- For each Population Update Process: Security needs to be granted to the component
- Query and Equation security needs to be granted

Population Selection Utility



Population Selection Utility

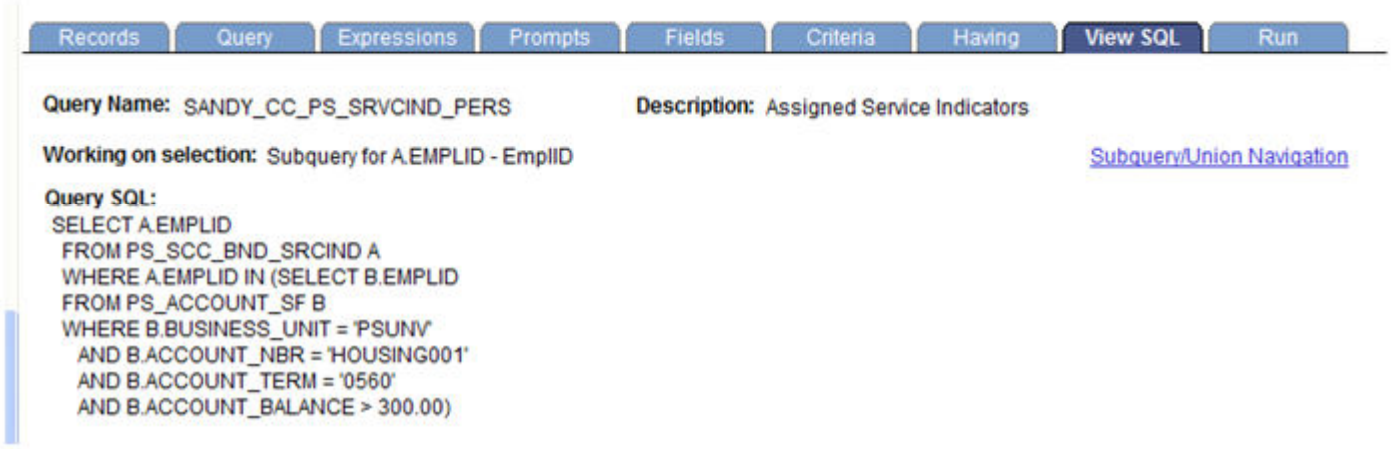


Assign Service Indicator

- **Process**: Mass Assign Service Indicator
- **Business Reason:** Identify a group of students who are NOT eligible for a self service payment plan.
- **Selection Tool:** Query

Mass Assign SI - Query

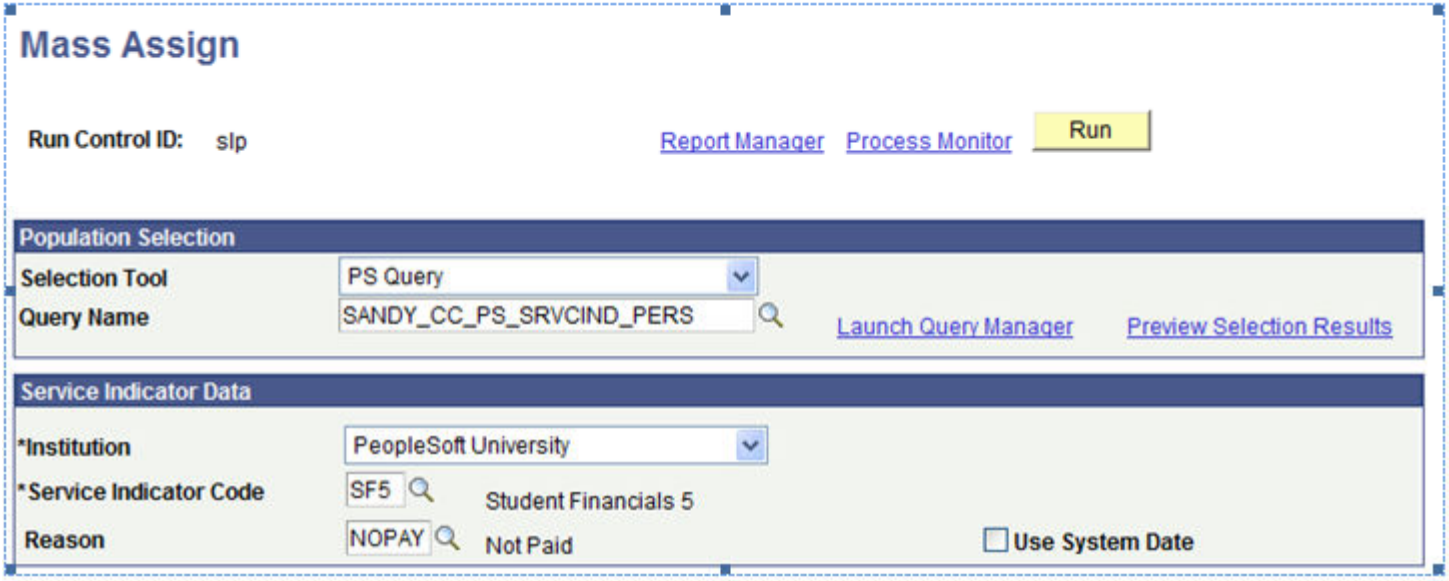
CS delivered pop select queries with a prefix of QA_CS.



Note the bind record: PS_SCC_BND_SRCIND

Mass Assign Service Indicator - Query

- Campus Community>Service Indicators(Student)>Mass Assign Process

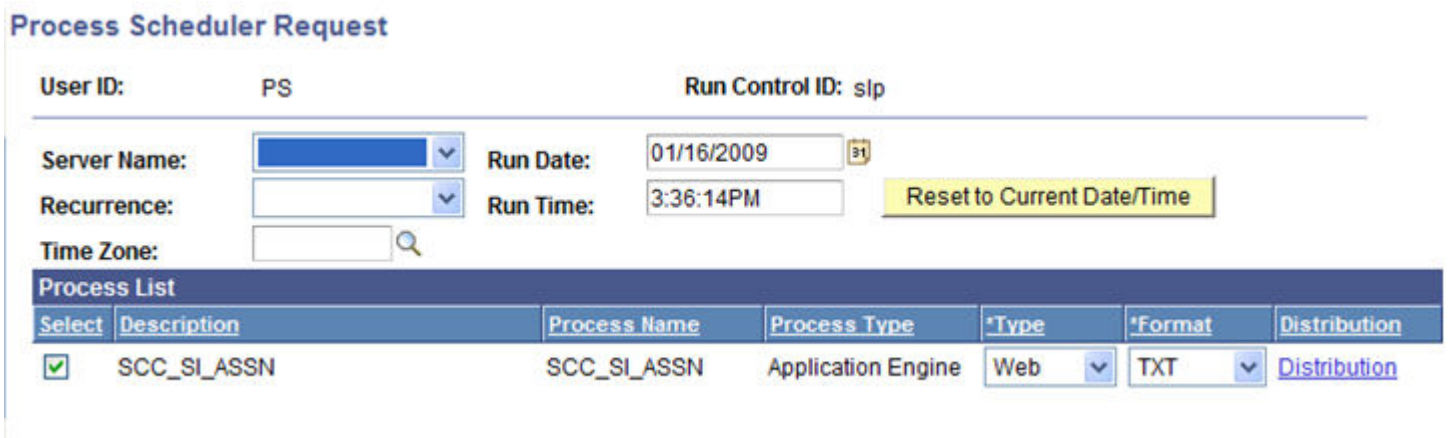


Mass Assign Service Indictor - Query

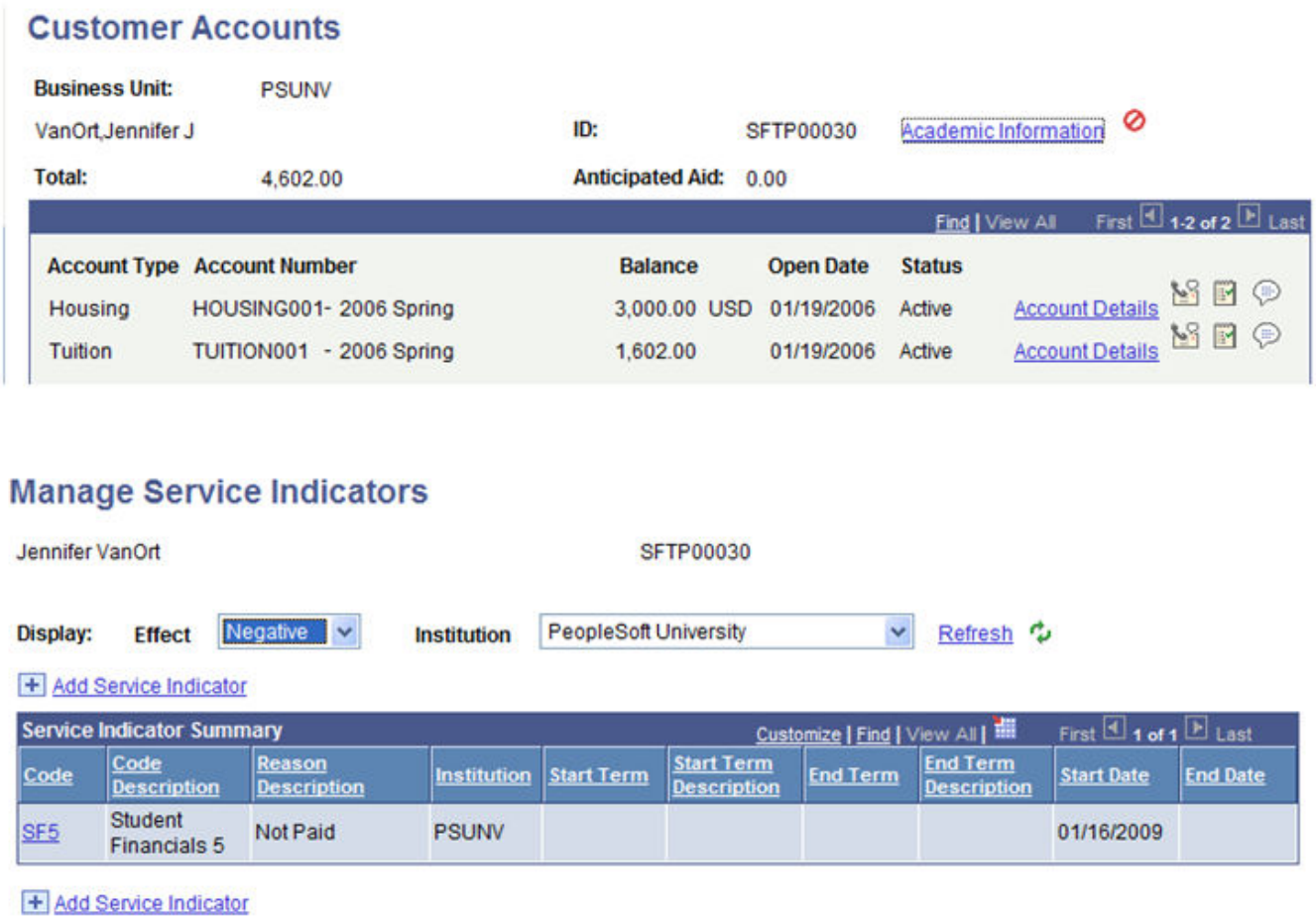
- Preview Selection Results allows you to “preview” your results prior to running the process.

	ID
1	SFCA00057
2	SFCA00058
3	SFCA00059
4	SFCA00060
49	SFTP00027
50	SFTP00028
51	SFTP00029
52	SFTP00030

- Run the Process SCC_SI_ASSN



Mass Assign Service Indicator - Query



Customer Accounts

Business Unit: PSUNV

VanOrt,Jennifer J **ID:** SFTP00030 Academic Information

Total: 4,602.00 **Anticipated Aid:** 0.00

Find | View All First 1-2 of 2 Last

Account Type	Account Number	Balance	Open Date	Status	
Housing	HOUSING001- 2006 Spring	3,000.00 USD	01/19/2006	Active	Account Details
Tuition	TUITION001 - 2006 Spring	1,602.00	01/19/2006	Active	Account Details

Manage Service Indicators

Jennifer VanOrt SFTP00030

Display: **Effect** Negative **Institution** PeopleSoft 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
SF5	Student Financials 5	Not Paid	PSUNV					01/16/2009	

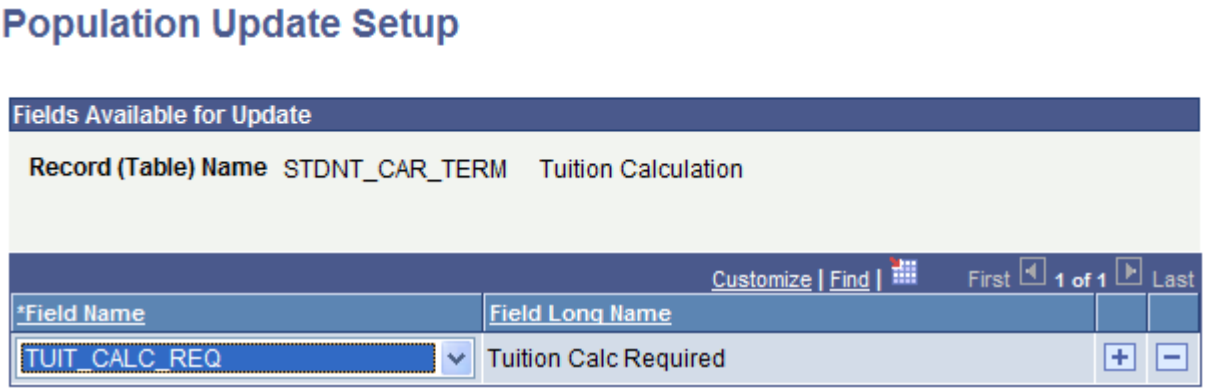
Add Service Indicator

Population Update

- **Process**: Pop Update to STDNT_CAR_TERM.TCAL.REQ_FLAG
- **Business Process**: Update pesky conversion rows. Reduce the number of students in testing batch tuition calc.
- **Selection Tool:** Query

Pop Update - Query

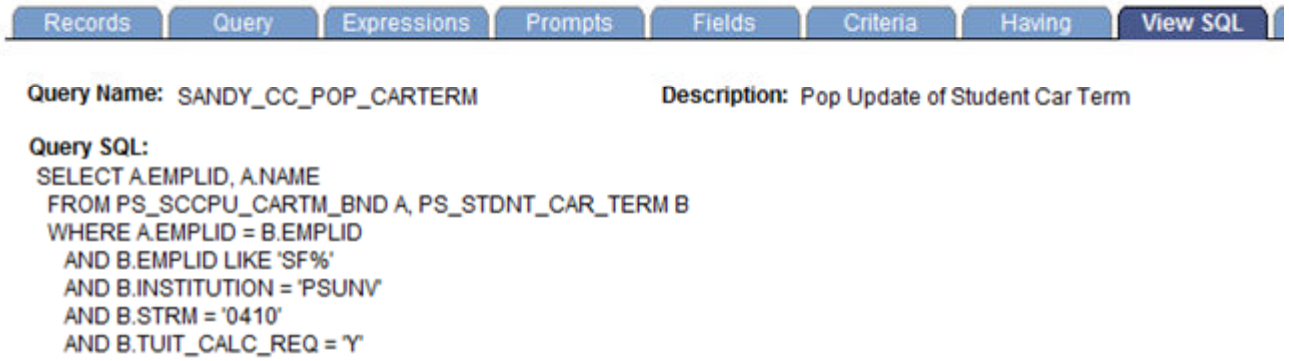
- Set Up SACR>System Administration>Utilities>Population Update



Select the Record to be updated. Select the field(s) that need to be updated.

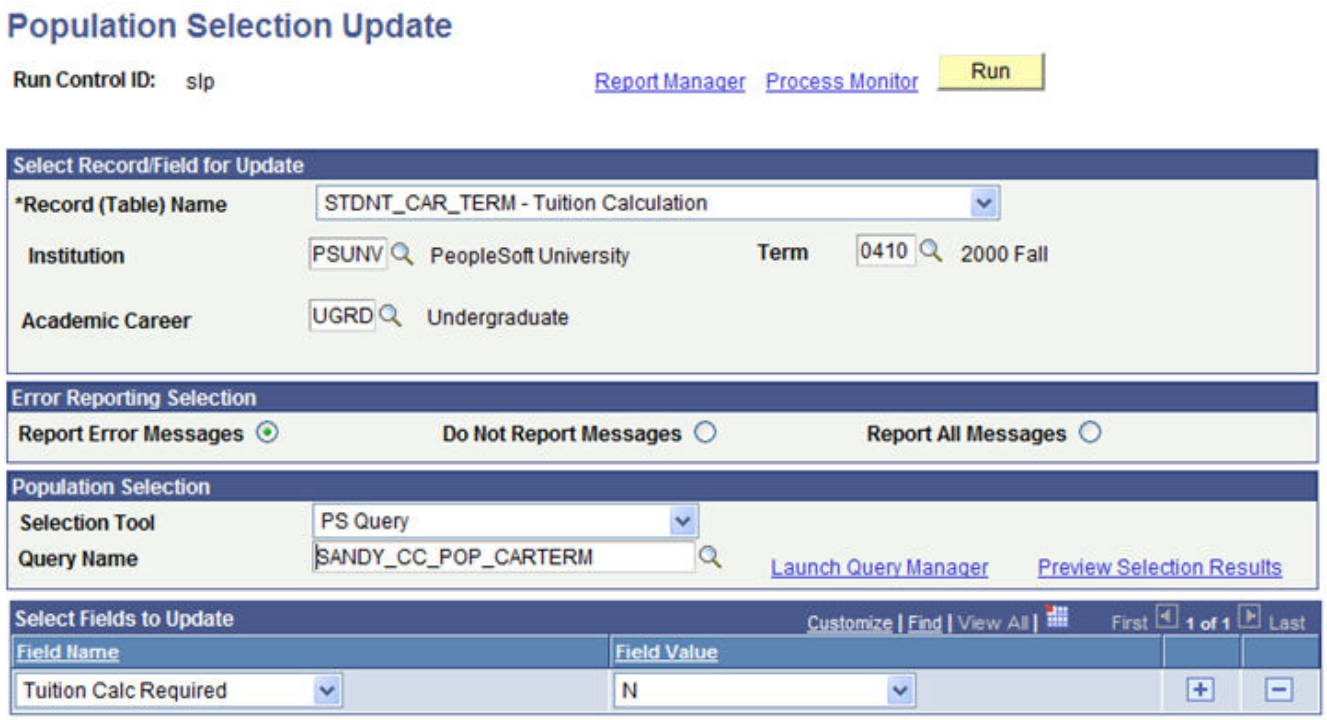
Pop Update - Query

- Modified delivered PS query: QA_CS_CC_POP_CARTERM



Pop Update - Query

- Set Up SACR>System Administration>Utilities>Population Update Process



Pop Update - Query

- Preview the results and run the process: SCC_POP_UPD. Review log file:

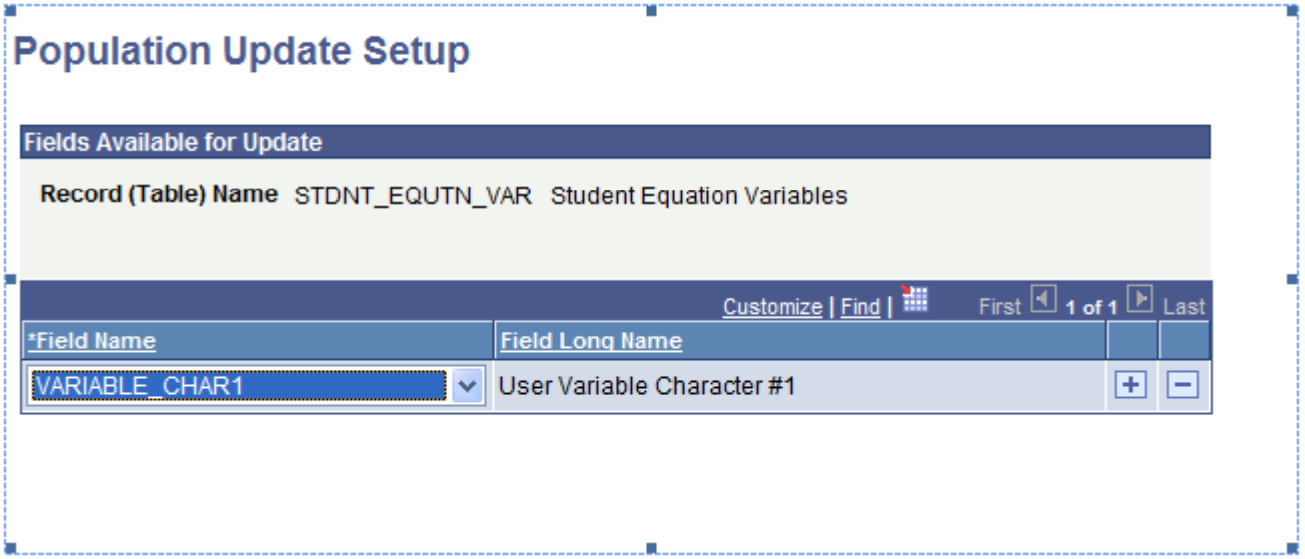
```
'SCC_POP_UPD' started at 2009-01-16-16.30.56.000000 (14401,82)

Total number of records read : 7 (14015,1010)

Total number of records updated successfully : 7 (14015,1011)

Total number of records failed : 0 (14015,1012)

'SCC_POP_UPD' ended at 2009-01-16-16.31.01.000000 (14401,83)
Application Engine program SCC_POP_UPD ended normally

PSAESRV completed service request at 16.31.00 2009-01-16
```

Pop Update - File

- **Process:** Pop Update to STDNT_EQUTN_VAR.VARIABLE_CHAR1
- **Business Process:** Use Student equation variable 1 (variable_char1) as criteria for a specific waiver or term fee in tuition calc
- **Selection Tool:** File

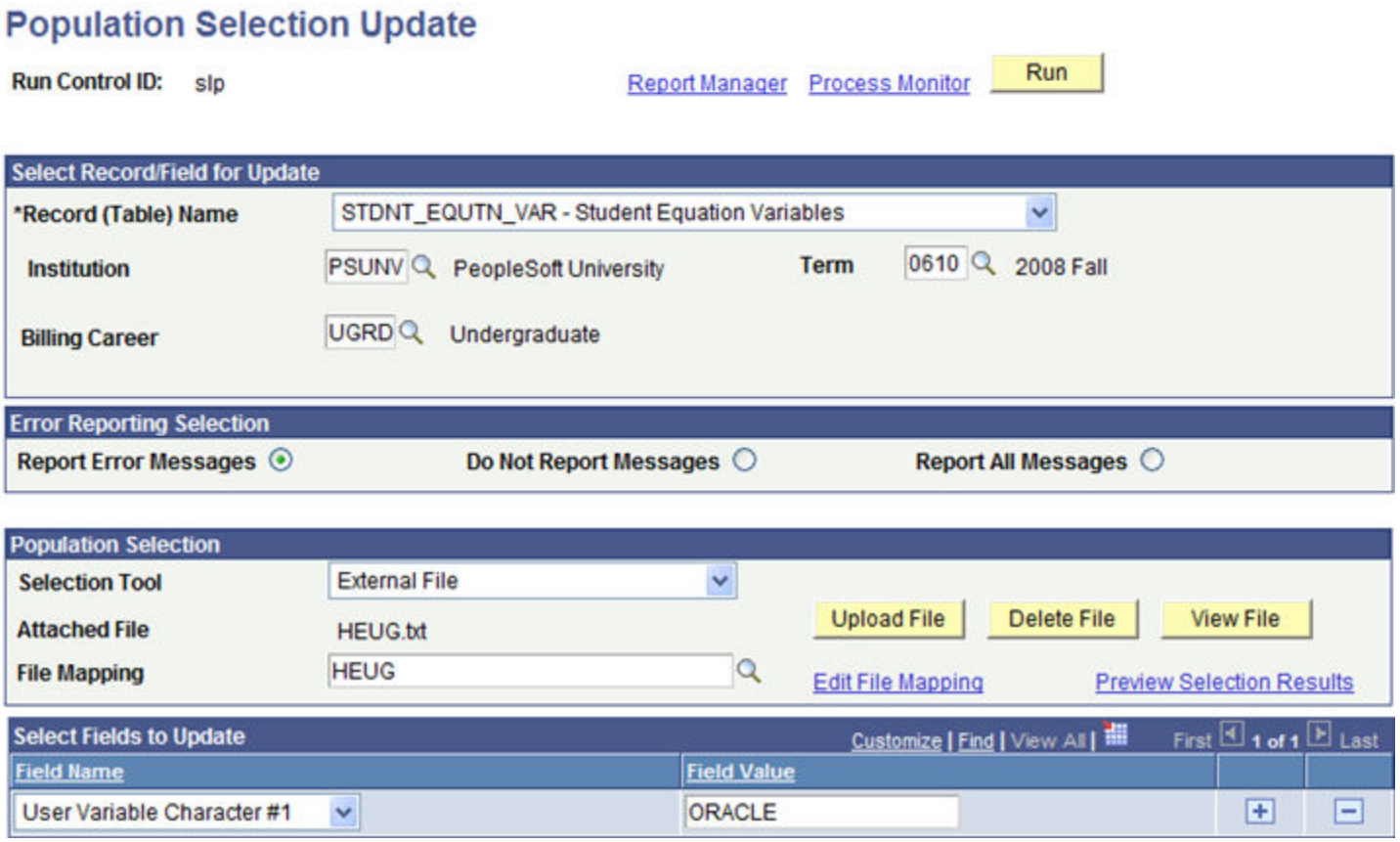
Pop Update - File

- Set Up SACR>System Administration>Utilities>Population Update Setup
- Select the Record to be updated. Select the field(s) that need to be updated.



- Set Up SACR>System Administration>Utilities>Population Update Process

Pop Update - File

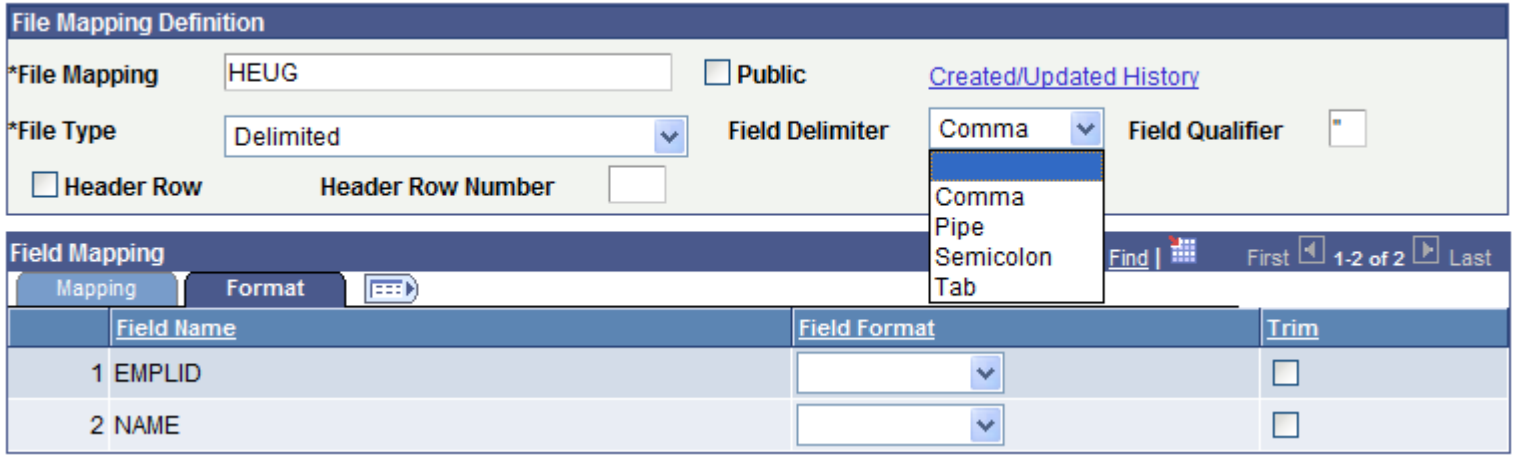


When using an external file selection tool, always preview the results to verify that the contents of your file are mapped correctly.

Pop Update - File

Population Selection File Map

Population Selection File Map



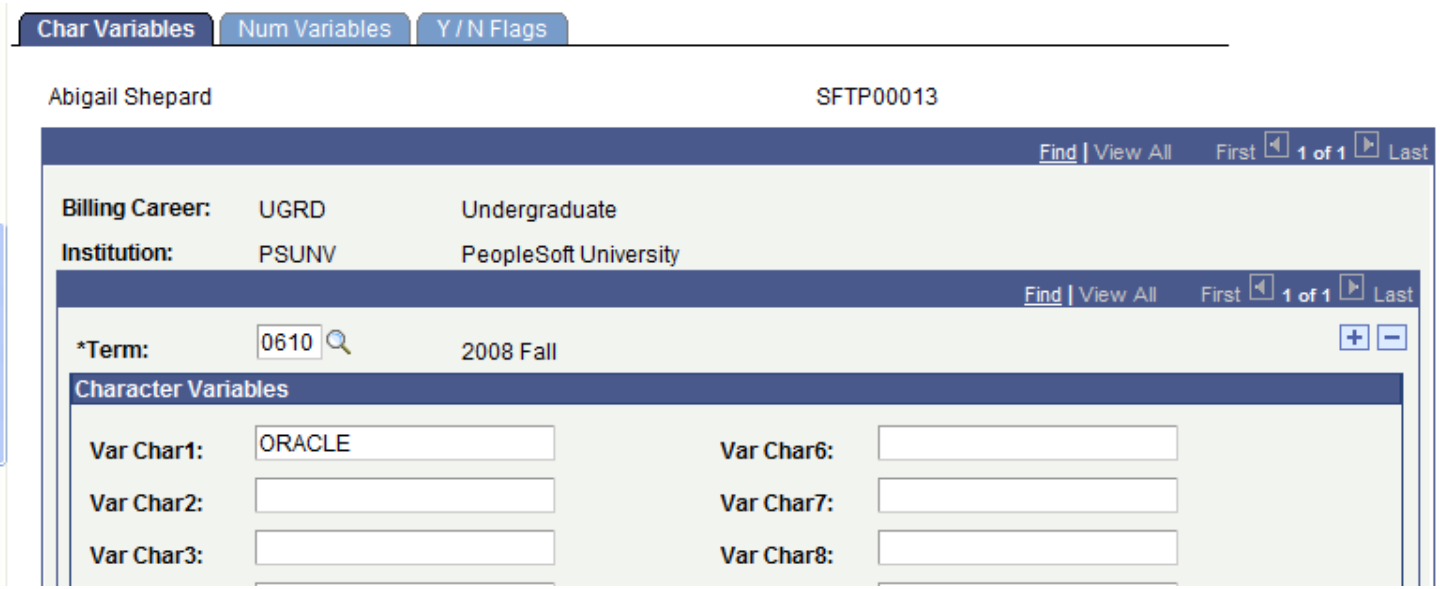
Pop Update - File

Run the process, SCC_POP_UPD. Review the output log:

```
PSAESRV started service request at 12.22.41 2009-01-20


'SCC_POP_UPD' started at 2009-01-20-12.22.42.000000 (14401,82)

Total number of records read : 2 (14015,1010)

Total number of records updated successfully : 2 (14015,1011)

Total number of records failed : 0 (14015,1012)

'SCC_POP_UPD' ended at 2009-01-20-12.22.44.000000 (14401,83)
Application Engine program SCC_POP_UPD ended normally

PSAESRV completed service request at 12.22.43 2009-01-20
```

Pop Update - File

Verify student equation variable 1 has the value ORACLE:



Communication Generation

So you may now want to send an e-mail or letter to the students with updated equation variables to inform them there may be a change to their tuition.

Karen Nixon seminar on www.heug.org.

Pop Update - Equation

- **Process:** Pop Update to Student Group
- **Business Process:** Use a specific student group to identify a special billing and Comm. Gen
- **Selection Tool:** Equation
- **Delivered Equations:** CCSGPSERANGE

Pop Update - Equation

Criteria that I would like to send a bill to:

Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL

Query Name: New Unsaved Query **Description:**

Query SQL:

```
SELECT A.BUSINESS_UNIT, A.EMPLID, A.ACCOUNT_NBR, A.ACCOUNT_TERM, A.ACCOUNT_BALANCE
  FROM PS_ACCOUNT_SF A
  WHERE A.BUSINESS_UNIT = 'PSUNV'
    AND A.ACCOUNT_NBR = 'LIBRARY001'
    AND A.ACCOUNT_TERM = '0560'
    AND A.ACCOUNT_BALANCE > 1.00
```

Results:

Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

View All | Rerun Query | Download to Excel First 1-3 of 3 Last

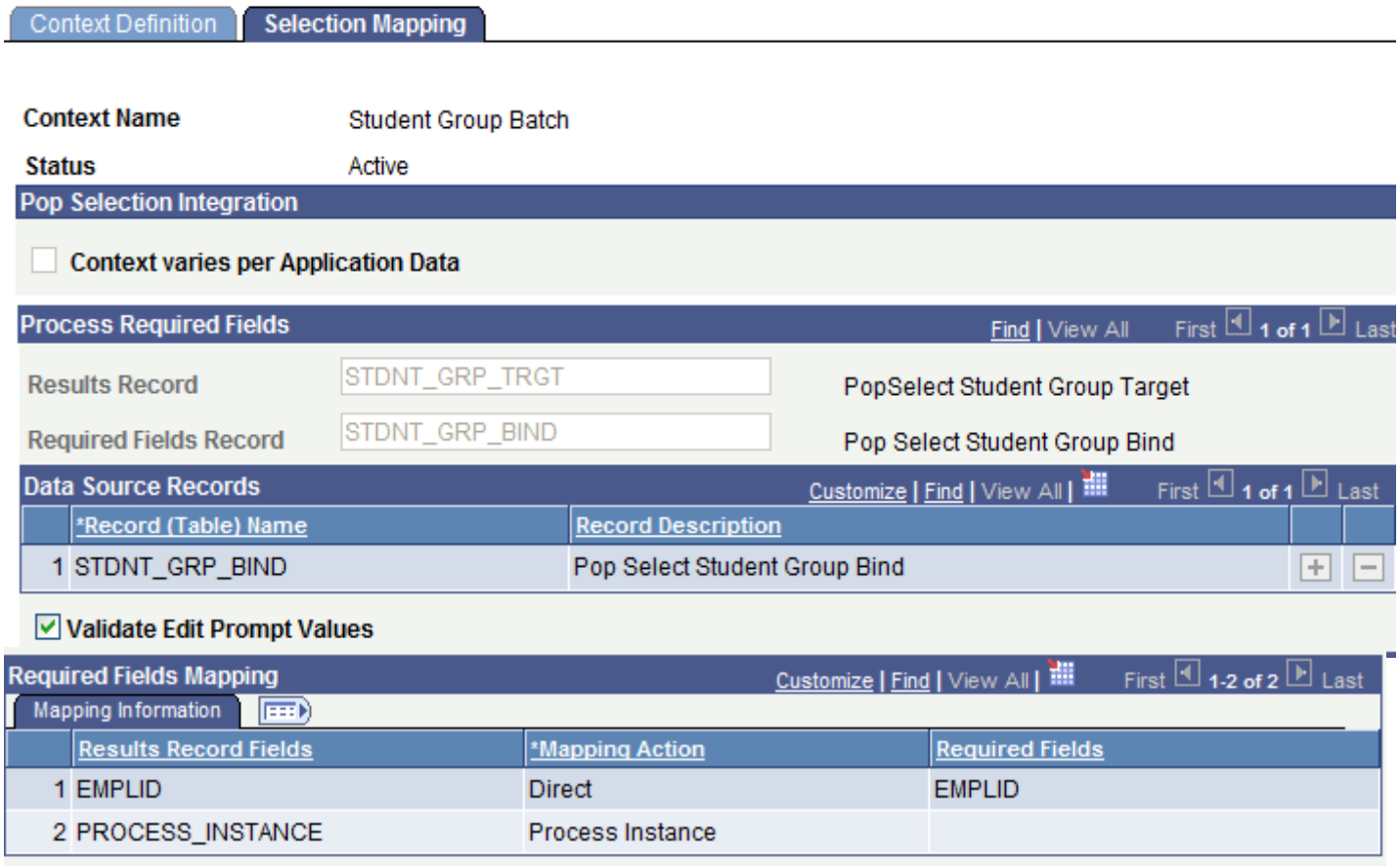
	Unit	ID	Acct Nbr	Acct Term	Balance
1	PSUNV	SFEUC0002	LIBRARY001	0560	33.44
2	PSUNV	SFEUC0003	LIBRARY001	0560	33.44
3	PSUNV	SFEUC0004	LIBRARY001	0560	33.44

Pop Update - Equation

- Equations you will need the Target Record Name that you will Insert rows into and you also need to know the BIND record.

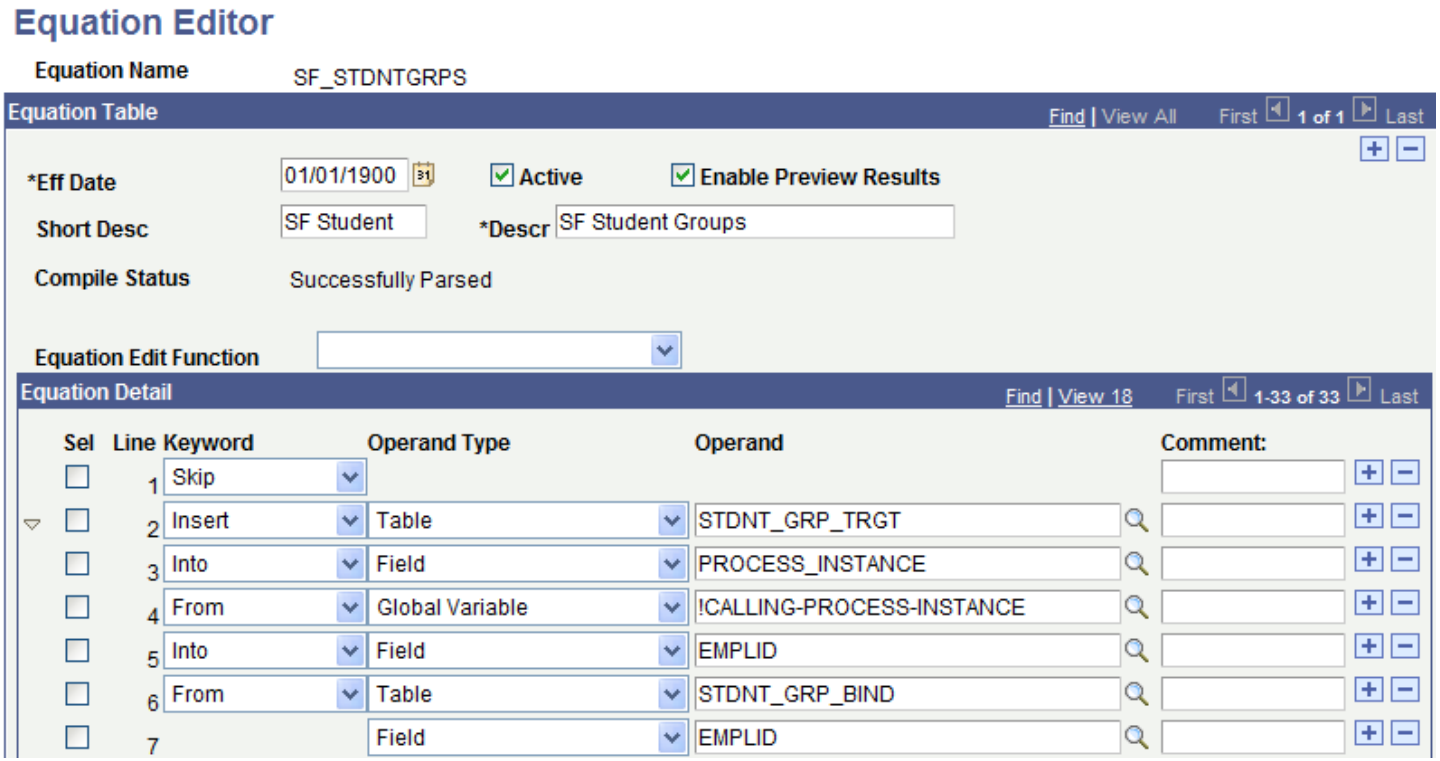
- Where to find this info: Set Up SACR>System Administration>Utilities>Population Selection>Context Definition.

Pop Update - Equation

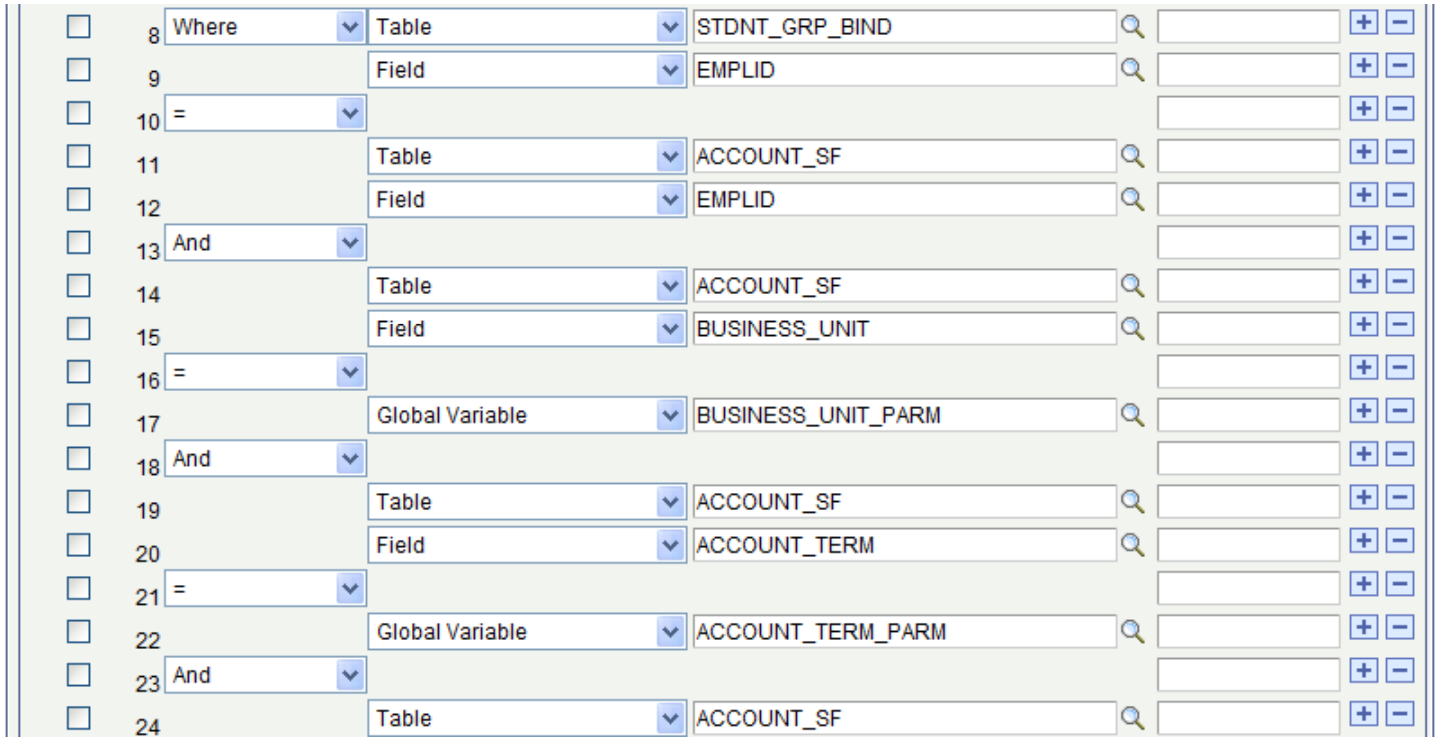


Pop Update - Equation

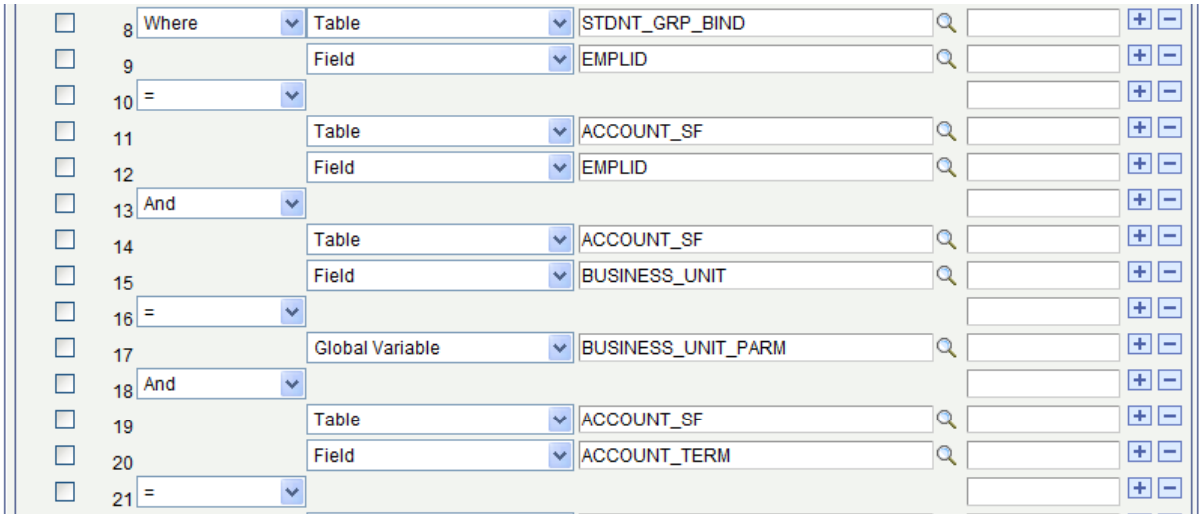
Create equation using the TARGET and BIND records in addition to your specific criteria.



Pop Update - Equation



Pop Update - Equation



8	Where	Table	STDNT_GRP_BIND		
9		Field	EMPLID		
10	=				
11		Table	ACCOUNT_SF		
12		Field	EMPLID		
13	And				
14		Table	ACCOUNT_SF		
15		Field	BUSINESS_UNIT		
16	=				
17		Global Variable	BUSINESS_UNIT_PARM		
18	And				
19		Table	ACCOUNT_SF		
20		Field	ACCOUNT_TERM		
21	=				

Application Prompts Customize | Find | View All | First 1 of 1 Last

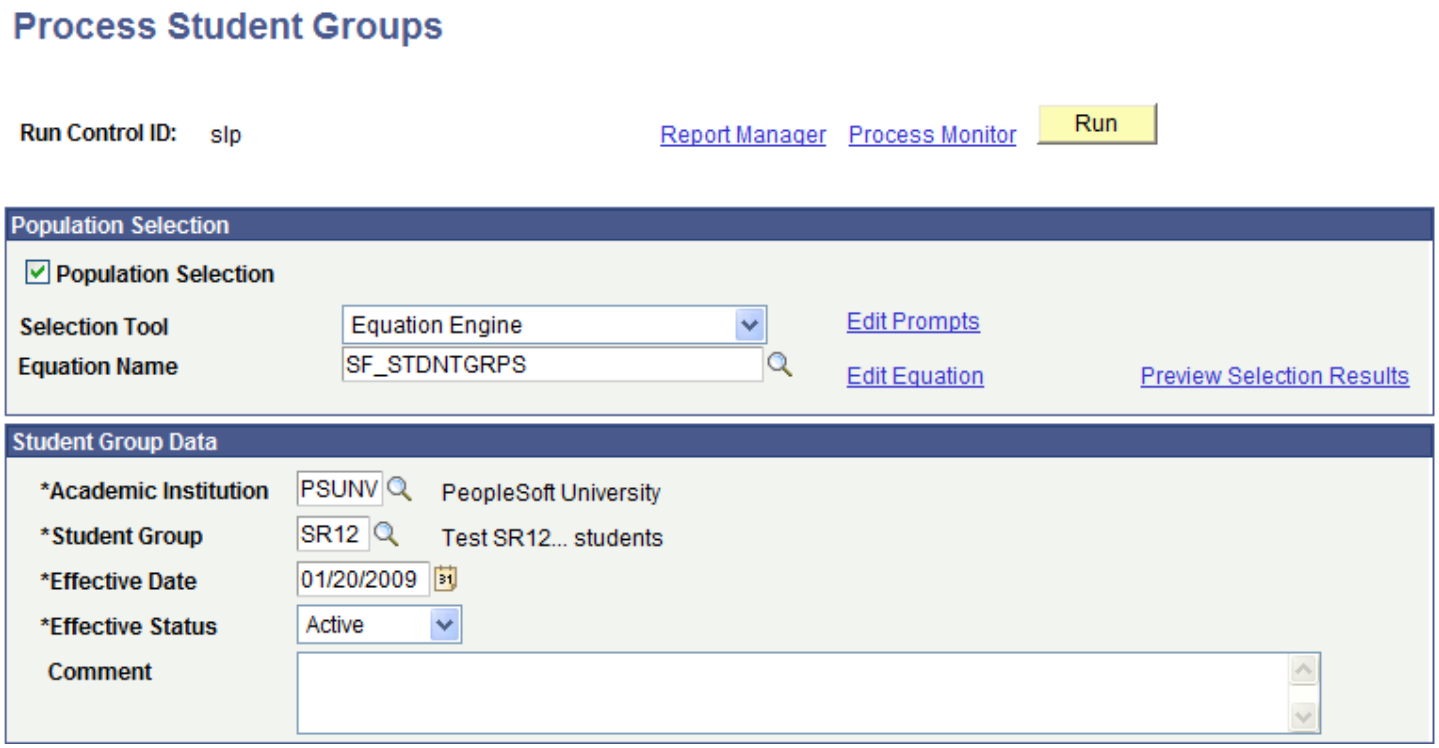
	*Application Prompt ID
1	Student Group Batch

Parameters Customize | Find | View 1 | First 1-4 of 4 Last

	Global	Type	Description
1	ACCOUNT_BALANCE_PARM	Number	Input Account Balance
2	ACCOUNT_NBR_PARM	String	Input Account Number
3	ACCOUNT_TERM_PARM	String	Input Account Term
4	BUSINESS_UNIT_PARM	String	Input Business Unit

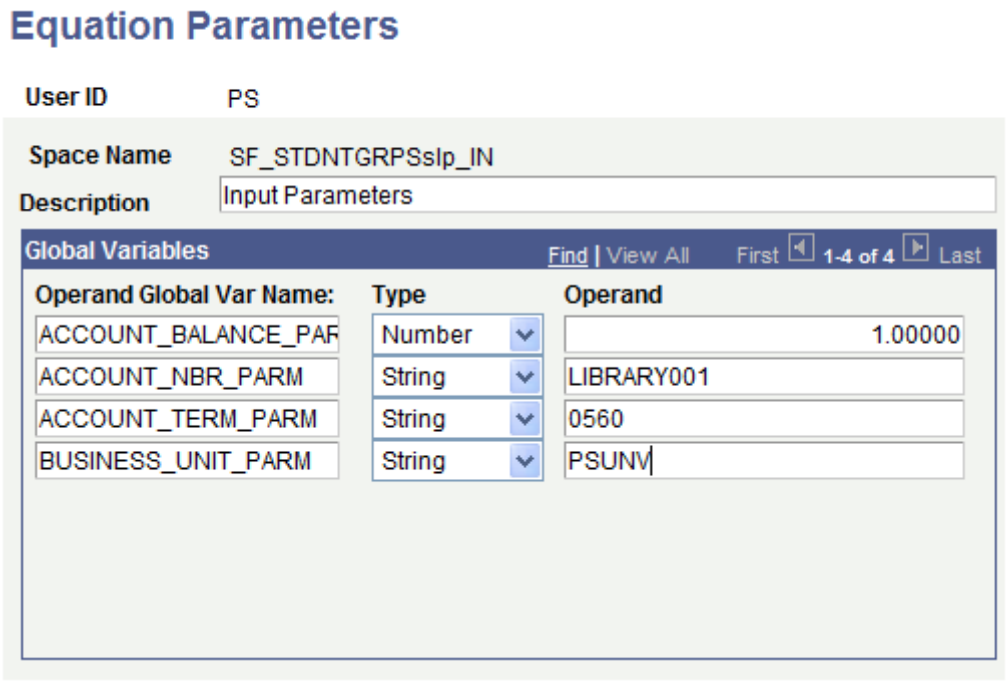
Pop Update - Equation

Records and Enrollment>Career and Program Info>Process Student Groups:



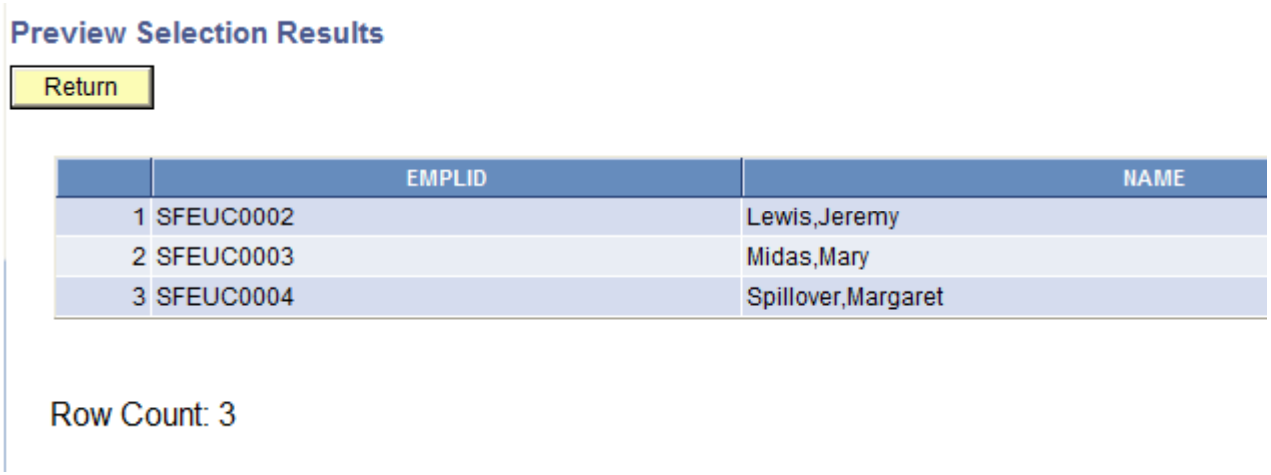
Pop Update - Equation

- **Enter values for the parms:**



Pop Update - Equation

- Preview Selection Results:



Preview Selection Results

Return

	EMPLID	NAME
1	SFEUC0002	Lewis,Jeremy
2	SFEUC0003	Midas,Mary
3	SFEUC0004	Spillover,Margaret

Row Count: 3

Pop Update - Equation

- Run process SCC_STD_GRP.
- View Log File:

```
PSAESRV started service request at 11.42.59 2009-01-20


Begin Program: SCC_STD_GRP (14035,15)

Total Population Selection Emplids Inserted:  3 (14035,48)

Pop Selection Inserts Complete (14035,15)

End Program: SCC_STD_GRP (14035,15)
Application Engine program SCC_STD_GRP ended normally

PSAESRV completed service request at 11.43.12 2009-01-20
```

Pop Update - Equation

View Student Groups by Student

Academic Institution: PSUNV PeopleSoft University **Effective Date:** 01/01/1900

Student Group: SR12 Test SR12... students **Effective Status:** Active

Select Effective Dates: Most Current Active Get Results

Range Selection: No Range Selection

Customize | Find | View All | First 1-39 of 39 Last

Name	ID	Effective Date	Effective Status	Comment	Details
Lewis,Jeremy	SFEUC0002	01/20/2009	Active		Details
Midas,Mary	SFEUC0003	01/20/2009	Active		Details
Spillover,Margaret	SFEUC0004	01/20/2009	Active		Details

Student Groups

Jeremy Lewis SFEUC0002

Find | View All First 1 of 1 Last

***Academic Institution:** PSUNV PeopleSoft University

***Student Group:** SR12 Test SR12... students

Find | View All First 1 of 1 Last

***Effective Date:** 01/20/2009 ***Status:** Active

Comments

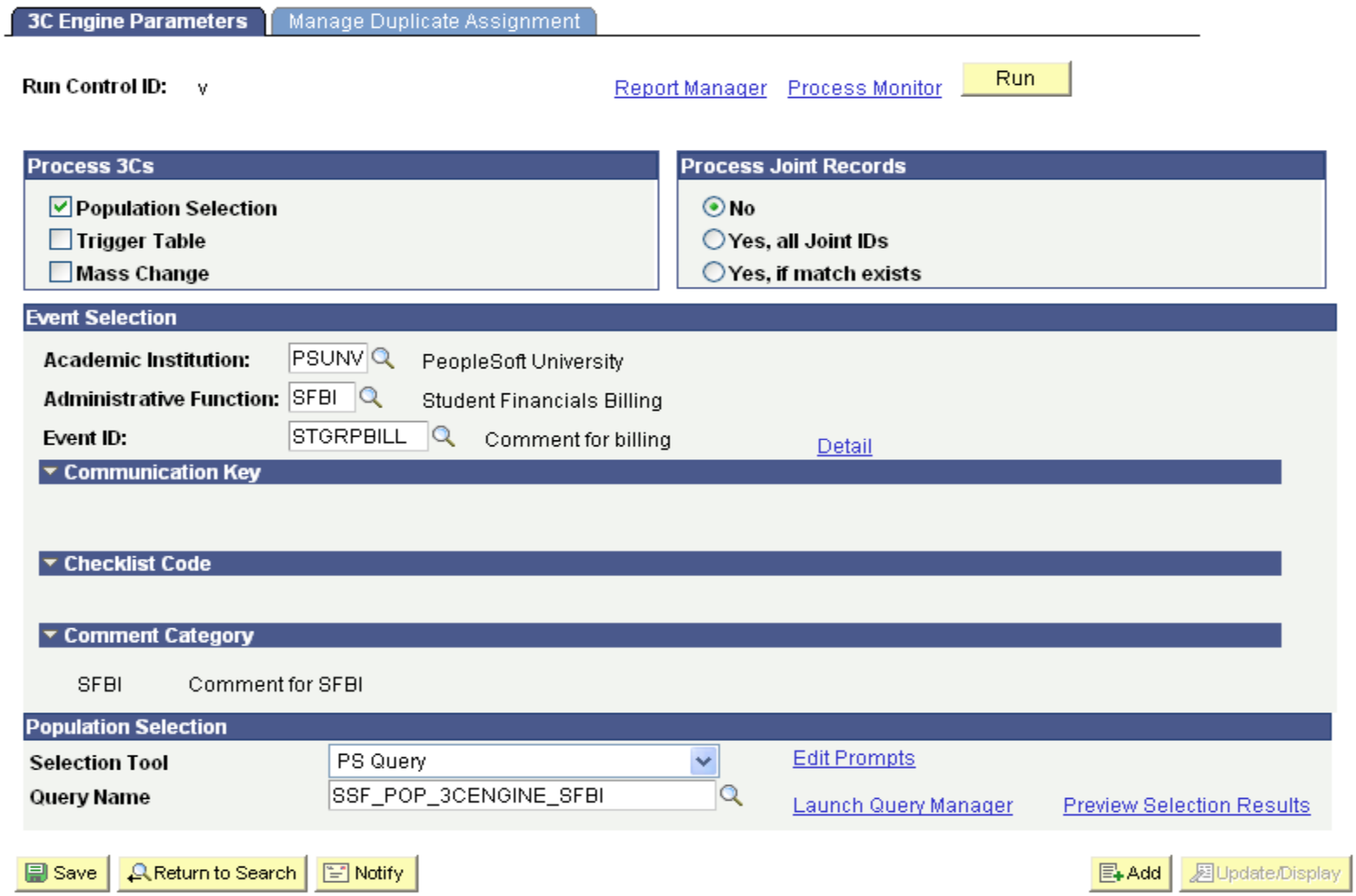
Last Update Date/Time: 01/20/2009 11:43:13AM **Updated By:** PS **Type:** SCC_STD_GRP

Pop Update - Equation

Now you have designated your small population that needs to be billed and you are able to use the Student Group selection in the Billing Standard Request.

You may also then use the 3C engine to place a comment on the students who received the billing explaining why there was a special billing.

3C Engine


3C Engine Parameters
Manage Duplicate Assignment
Run Control ID: v
Report Manager
Process Monitor
Run
Process 3Cs
Population Selection
Trigger Table
Mass Change
Process Joint Records
No
Yes, all Joint IDs
Yes, if match exists
Event Selection
Academic Institution: PSUNV PeopleSoft University
Administrative Function: SFBI Student Financials Billing
Event ID: STGRPBILL Comment for billing
Detail
Communication Key
Checklist Code
Comment Category
SFBI Comment for SFBI
Population Selection
Selection Tool PS Query
Edit Prompts
Query Name SSF_POP_3CENGINE_SFBI
Launch Query Manager
Preview Selection Results
Save
Return to Search
Notify
Add
Update/Display
3C Engine Parameters | Manage Duplicate Assignment

Current processes that are configured to use the Pop Select Utility:

Audience Criteria

Advisement Report

Application Delete by Batch

Prospect Delete by Batch

3C Engine

Mass User Security Replacement

Population Update

Process Student Groups

Service Indicator Person Mass Assign and Service Indicator Organization Mass Assign

Service Indicator Person Mass Release and Service Indicator Organization Mass Release

Aid Year Activate

Mass Packaging Select

Select Students for Need Summary Validation

Select Students for Repackaging

Process Satisfactory Academic Progress (SAP)

SF External Award Feed

Mass Contract Select

Process Transcripts and Batch Transcript Request

Records currently available for updating:

Record (Table) Name	Field
ADM_APPL_RCR_CA	RECRUIT_SUB_CAT
ADM_PRSPCT_CAR	FIN_AID_INTEREST HOUSING_INTEREST
INAS_CALC_RECS	CALC_STATUS
ISIR_CONTROL	CORRECTION_STATUS
PERS_INST_REL	Too many to list
SFA_SLC_STUDENT	SFA_SLC_P_ATT_IND
STDNT_AID_ATRBT	Too many to list
STDNT_CAREER	SAA_SYNCHRONIZE
STDNT_CAR_TERM	COUNTRY ELIG_TO_ENROLL EXT_ORG_ID FORM_OF_STUDY OVRD_BILL_UNITS PROJ_BILL_UNIT STUDY_AGREEMENT TUIT_CALC_REQ
STDNT_EQUTN_VAR	VARIABLE_NUMxx VARIABLE_FLAGxx VARIABLE_CHARxx
STDNT_FA_TERM	BUDGET_REQUIRED FA_STATS_CALC_REQ
STDNT_PKG_VAR	Too many to list

Feedback

- Which processes could be enhanced to use the Pop Select utility?
- Identify additional PS Records/fields that could be updated via Pop Update?
- Questions?

- The evaluation survey link (URL) is, http://www.heug.org/p/su/rd/sid=283

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