

EXTERNAL ORGANIZATIONS – Educational Institutions DUPLICATE RECORD PROCEDURES

Marking Duplicate Records so they won't be used

It is important to identify and merge duplicate OrgID record information in PeopleSoft. Duplicate organizations are retained in the SFIS Database with a Status of "Inactive." They are not removed from PeopleSoft. This is done for historical purposes. (Note: OrgIDs for organizations are comparable to EmplIDs for individuals.) This documentation contains a description of the necessary steps.

IMPORTANT:

- These instructions concern duplicate records for educational institutions. Other types of organizations should be reviewed and changed in a similar manner. However, non-educational organizations do not utilize the School Data page, and their Organization Type and Proprietorship codes are different.
- Before marking an OrgID as a duplicate record, use the standard practices of your office to ensure that there are no students associated with the duplicate organization. If there are, the students' records should be updated with the accurate information.
- If while working on these steps you encounter an External Organization that has more than one Organization Table page under one OrgID, the second page should be given a Status of Inactive. Please consult the PeopleSoft Functional Analyst with any questions about such a record.
- The pages that need to be reviewed and/or corrected are all Effective Dated which means that, in order to make changes, you will need to click on the **Correct History** button in order to save your edits.
- The pages to be reviewed are:
 - Organization Table
 - School Data
 - Location Detail
- The process consists of two main procedures:
 - [Verify Accurate Record](#): First, the **accurate** record, i.e. the record that will be kept, is first reviewed and updated as appropriate.
 - [Mark Duplicate Record](#): Then the **duplicate** record may be updated and marked as such. It is not deleted from the database.

PROCEDURE TO UPDATE THE ACCURATE RECORD:

After confirming that the suspected record is a duplicate of a bona fide, existing record in the database, you should first verify that the **accurate** record has been entered properly, making any updates that are necessary.

- a. Navigate to the **Organization Table** for the accurate record.
 - i. Navigation: **Campus Community > Organization > Create/Maintain Organizations > Organization Table**
 - ii. Search for the Organization
 - iii. *If you need to make any changes, click on the **Correct History** button. It should be grayed out.*

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- iv. Verify the accuracy of the **Effective Date**.
- v. Ensure that the **Status** is **Active**.
- vi. Confirm the accuracy of the three **Description** fields
- vii. Verify that the **Organization Type** is **COLL** or **SCHL** only. (*Exception: NRS*)
- viii. Check that the **Proprietorship** is correct for the **Organization Type**. If unsure, select **Public**.
- ix. **Save** the page. If when you click **Save** you receive a popup message beginning "Cannot change current or history records unless in Correction mode..." click on the **Correct History** button, and then click **Save** again.

The screenshot shows the 'Organization Table' page in PeopleSoft. The breadcrumb trail is: Favorites > Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization Table. The page has two tabs: 'Organization Table' and 'Regional', with 'Regional' selected. The 'External Org ID' is 129380. The 'Organization Details' section includes: *Effective Date: 01/01/1900; *Status: Active; *Description: California Institute of Arts; Long Description: California Institute of Arts; Short Description: Calif Inst; *Organization Type: COLL; *Proprietorship: Public. Below this is the 'Active Locations' table with one entry: Location 1, Description California Institute of Arts, Address 24700 McBean Prkway, Valencia, CA 91355, Effective Date 01/01/1900, and Primary checked. There are also sections for 'Active Contacts' and 'Active Departments', both currently empty. The 'Vendor Information' section has fields for SetID, Vendor ID, and Taxpayer ID. The 'Organization Type Related Information' section shows 'College'. At the bottom, it says 'Last Update Date/Time: 02/25/2014 10:58:56AM by: CPIKE01'. A toolbar at the bottom contains buttons for Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History. A red banner at the bottom of the screenshot reads 'ACCURATE RECORD – COMPLETED ORGANIZATION TABLE PAGE'.

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- b. **Open the School Data** page for the accurate record:
 - i. From the **Organization Table** page for the accurate record, click on the link under **Organization Type Related Information**. You are taken to the **School Data** page. Verify and update if needed the information on the **School Data** page.
 - ii. *If you need to make any changes, be sure the **Correct History** button is grayed out on the **Organization Table** page.* Otherwise, you will not be able to save the changes.
 - iii. The **Effective Date** should be the same as or less than that on the **Organization Table** page
 - iv. The **Status** should be **Active**
 - v. The box **Offers Courses** should be checked
 - vi. Under **School Characteristics** the **School Type** should be populated with either **College** or **Secondary**, as appropriate.
 - vii. Ensure that there is an **ATP Code** under **School Codes**. If there is not, do a search for the **ATP Code** in the sources available. These are some of the web sites you can search for the appropriate **ATP Code**:

High School and College ATP Code Search:

<http://sat.collegeboard.org/SAT/public/pdf/sat-code-list-us.pdf>

High School ATP Code Search:

http://apps.collegeboard.com/cbsearch_code/codeSearchHighschool.jsp

http://www.suny.edu/Student/search_highschool/index.cfm

<https://www.ugadmissions.rutgers.edu/forms/includes/hsCeebLookup.aspx?st=NJ&theForm=rsvpform&theFieldCeeb=ceeb>

Colleges/Universities ATP Code Search:

http://apps.collegeboard.com/cbsearch_code/codeSearchCollege.jsp

http://www.suny.edu/student/search_colleges/college_search.cfm

http://inquiry.embark.com/SNHU/College_Search/fieldchooser.asp?FID=CollegeCEE%5FCurrent

- viii. Enter the **ATP Code**.
- ix. The **School Data** page should now look similar to this:

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School Data

Org ID: 129380 California Institute of Arts

Primary Location: 1 California Institute of Arts

Organization Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

Offers Courses

School Characteristics

Accredited

Transcript Translation

School Type: College

School Codes

ATP: 004049

FICE:

ACT:

IPEDS:

NCES:

System Default Values

Career: Undergrad

Term Type: Semester

Unit Type: Semester

Catalog Information

School District:

Shared Catalog

Catalog Org:

School Code:

OK Cancel Apply

ACCURATE RECORD – COMPLETED SCHOOL DATA PAGE

- x. Click **OK**.
 - xi. You are returned to the **Organization Table** page
- c. Navigate to the **Location Detail** page for the accurate record:
- i. From the **Organization Table** page for the Accurate Record, click on the yellow **Locations** button under **Active Locations**.
 - ii. The **Location Summary** page opens. *If you need to make any changes, be sure the **Correct History** button is grayed out on the **Organization Table** page. Otherwise, you will not be able to save the changes.*

Location Summary | Location Detail

Org ID: 129381 Claremont Mckenna

Primary Location: 1 Claremont Mckenna

Location	Description	Address	Effective Date	Status	Location Details
1	Claremont Mckenna	890 Columbia Claremont, CA 91711	01/01/1900	Active	Location Details

Add

OK Cancel Apply

Location Summary | Location Detail

- i. **Open the Locations Detail page**
- ii. Click on the **Location Detail** tab or on the **Location Details** link

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- iii. The **Effective Date** should be the same as or less than that on the **Organization Table** page
- iv. The **Status** should be **Active**
- v. The **Description** and **Short Desc** should be populated
- vi. The **Country** should be populated

Location Summary | Location Detail

Org ID: 129380 California Institute of Arts

Primary Location: 1 California Institute of Arts

Location: 1

Location History

Effective Date: 01/01/1900 Status: Active

*Description: California Institute of Arts

Short Desc: Calif Inst

Country: USA United States

Address: 24700 Mcbean Prkway
Valencia, CA 91355 [Edit Address](#)

ACCURATE RECORD – COMPLETED LOCATION DETAIL PAGE

- vii. Click on the **Edit Address** link
- viii. On the **Edit Address** page, the available address information should be entered
- ix. Click **OK** on the **Edit Address** page and then on the **Location Detail** page. You are returned to the **Organization Table** page
- x. Under **Active Locations**, be sure that the box **Primary** is checked
- xi. In the dropdown box next to **Primary Location**, verify that it contains a 1.

Edit Address

Country: United States [Change Country](#)

Address 1: 24700 Mcbean Prkway

Address 2:

Address 3:

City: Valencia State: CA California Postal: 91355

County:

OK Cancel

ACCURATE RECORD – COMPLETED EDIT ADDRESS PAGE

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PROCEDURE TO UPDATE THE DUPLICATE RECORD:

Once the accurate record has been updated and saved, you can proceed to mark the duplicate record.

- a. Navigate to the **Organization Table** for the duplicate record.
 - i. Navigation: **Campus Community > Organization > Create/Maintain Organizations > Organization Table**
 - ii. Search for the Organization

The screenshot shows the 'Organization Table' for External Org ID 363894. The record is for 'California Institute of Arts' with an effective date of 01/01/1900 and status 'Active'. The interface includes sections for Organization Details, Active Locations, Active Contacts, Active Departments, Vendor Information, and Organization Type Related Information. At the bottom, there are buttons for Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.

Duplicate Record – Organizational Table Before Edits

- iii. Click on the **Correct History** button. It should be grayed out.
- iv. Change **Status** to **Inactive**
- v. Change the names in the three description boxes:

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1. Change the name of the **Description** to: **Duplicate Record, Use #####**, where ##### equals the OrgID of the accurate record.
 2. Change the **Long Description** to the same name
 3. Change the **Short Description** to **Duplicate**
- ii. Click **Save**
- iii. The **Organization Details** section of the page should now appear as follows:

External Org ID: 363894

Organization Details

*Effective Date: 01/01/1900 *Status: Inactive

*Description: Duplicate Record, Use 129380

Long Description: Duplicate Record, Use 129380

Short Description: Duplicate

*Organization Type: SCHL School

*Proprietorship: Other

DUPLICATE RECORD – COMPLETED TOP OF ORGANIZATION TABLE PAGE

- b. Open the **School Data** page
- i. Click on the link below the header **Organization Type Related Information**
 - ii. Change **Status** to **Inactive**
 - iii. Uncheck **Offers Courses**
 - iv. Make **School Type** blank
 - v. Double check that there is no ATP Code under **School Codes**. Remove if there is.
 - vi. Click **OK**. You are returned to the **Organization Table** page

School Data

Org ID: 363894 California Institute of Arts

Primary Location: 1 California Institute of Arts

Organization Details

*Effective Date: 01/01/1900 *Status: Inactive

Offers Courses

School Characteristics

Accredited

Transcript Translation

School Type

School Codes

ATP: []

FICE: []

ACT: []

IPEDS: []

NCES: []

System Default Values

Career: []

Term Type: []

Unit Type: []

Catalog Information

School District: []

Shared Catalog

Catalog Org: []

School Code: []

OK Cancel Apply

DUPLICATE RECORD – COMPLETED SCHOOL DATA PAGE

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c. Open the **Locations** pages

- i. Click on the **Locations** button beneath the **Active Locations** section
- ii. The following page is the **Location Summary** page. Click on either the **Location Detail** tab or on the **Location Details** link
- iii. Change the **Status** to **Inactive**
- vi. Change the names in the three description boxes:
 1. Change the name of the **Description** to: **Duplicate Record, Use #####**, where ##### equals the OrgID of the accurate record.
 2. Change the **Short Description** to **Duplicate**
- iv. Click on the **Edit Address** link
- v. Remove the **Address** information from all fields.
- vi. Click OK on the **Edit Address** page and then on the **Location Detail** page. You are returned to the Organization Table page
- vii. A warning may appear: **Warning -- At least one address is required when adding a new organization. (14200,14)**
- viii. Click **OK**. You are returned to the **Organization Table** page

Location Summary | Location Detail

Org ID: 363894 California Institute of Arts

Primary Location: 1 California Institute of Arts

Location: 1

Location History

Effective Date: 01/01/1900 Status: Inactive

*Description: Duplicate Record, Use 129380

Short Desc: Duplicate

Country: United States

Address: 24700 McBean Parkway [Edit Address](#)

DUPLICATE RECORD - LOCATION DETAIL PAGE

Edit Address

Country: United States [Change Country](#)

Address 1:

Address 2:

Address 3:

City: State: Postal:

County:

OK Cancel

DUPLICATE RECORD - EDIT ADDRESS PAGE

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- i. On the **Organization Table** page, under **Active Locations**
 1. Remove the number from the Primary Location box; the box should now be empty
 2. The Primary Location dropdown should be empty

Organization Table Regional

External Org ID: 363894

Organization Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Inactive

*Description: Duplicate Record, Use 129380

Long Description: Duplicate Record, Use 129380

Short Description: Duplicate

*Organization Type: SCHL School

*Proprietorship: Other

Active Locations Personalize Find | View All First 1 of 1 Last

Location	Description	Address	Effective Date	Primary
				<input type="checkbox"/>

Primary Location: Locations

Active Contacts Personalize Find | View All First 1 of 1 Last

Contact	Name	Type	Job Title	Effective Date	Primary
					<input type="checkbox"/>

Primary Contact: Contact Type Preferred Contacts

Active Departments Personalize Find | View All First 1 of 1 Last

Department	Description	Type	Effective Date	Primary
				<input type="checkbox"/>

Primary Department: Departments

Vendor Information

SetID: Vendor ID: Taxpayer ID:

Organization Type Related Information

School

Last Update Date/Time: 01/31/2014 12:17:09PM by: CPIKE01

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

DUPLICATE RECORD - ORGANIZATION TABLE PAGE

- d. When completed, if you do a search for the above OrgID, you will only find the **Organization Table** page. If you click on the **Locations** button or the link under **Organization Type Related Information** and try to search, you will receive a message of "No matching values were found"

End of Process