

WESLEYAN
UNIVERSITY



Student/Faculty Information System

PeopleSoft Campus Solutions 9.0

External EDUCATIONAL Organizations

Screenshots Displaying Completed
Pages/Screens

New Blank Organization Table Page

Defaults (Organization Details section):

1. Effective Date: Today's Date
2. Status: Active
3. Organization Type: SCHL
4. Proprietorship: Public

Note: As of spring 2014, Active Contacts, Active Departments and Vendor Information are not required.

Defaults (Organization Type Related Information section):

1. School (derived from Organization Type)

The screenshot displays the 'Organization Table' page for Wesleyan University. The 'External Org ID' is set to 'NEW'. The 'Organization Details' section shows the following default values: Effective Date: 04/15/2014, Status: Active, Organization Type: SCHL, and Proprietorship: Public. Below this, there are sections for Active Locations, Active Contacts, Active Departments, and Vendor Information, each with a search box and a 'Primary' button. The 'Organization Type Related Information' section shows 'School' as the default value. At the bottom, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History.

Location	Description	Address	Effective Date	Primary
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Contact	Name	Type	Job Title	Effective Date	Primary
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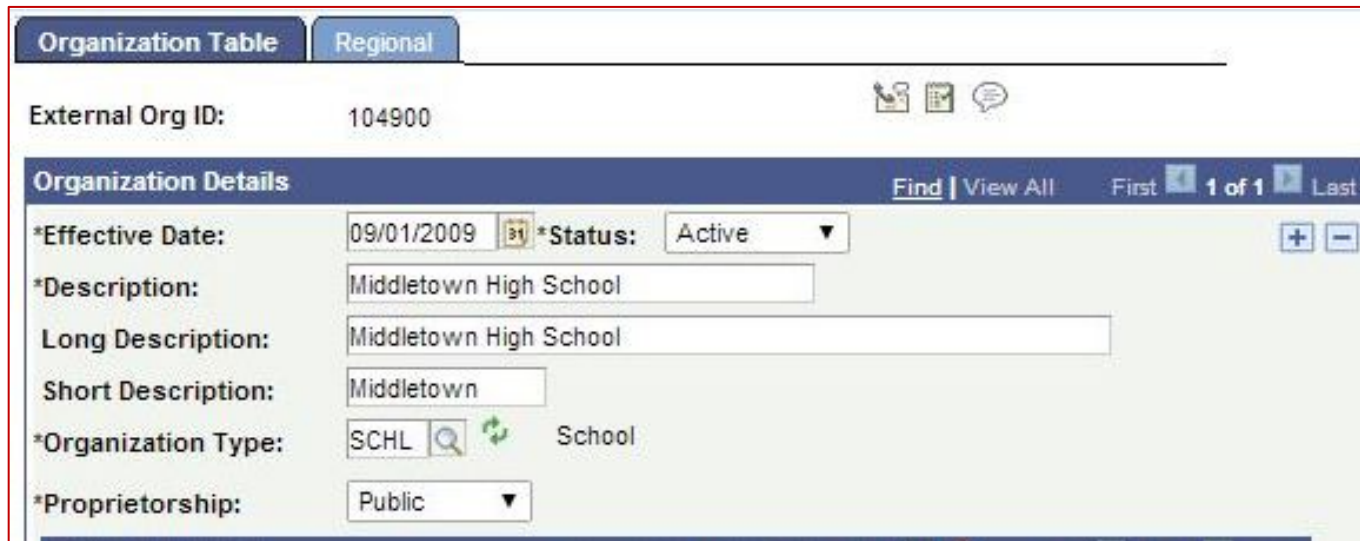
Department	Description	Type	Effective Date	Primary
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SetID	Vendor ID	Taxpayer ID
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Organization Type Related Information
School

Populating Organization Details – Secondary Institution (Organization Table Page)

1. **External Org ID:** Next available Org ID is assigned once the record is saved.
2. **Effective Date:** Default of today's date is kept
3. **Status:** Default of Active is retained
4. **Description:** Entire name of school fits in the field (under 30 characters). Otherwise, use carefully chosen, distinctive words to facilitate searching
5. **Long Description:** Entire name of school fits in the field (under 50 characters)
6. **Short Description:** First word of school name is sufficient for this example (under 10 characters). Note that this field can be utilized for other descriptive purposes.
7. **Organization Type:** Default of SCHL is retained (other educational option is COLL)
8. **Proprietorship:** Default of Public is retained.

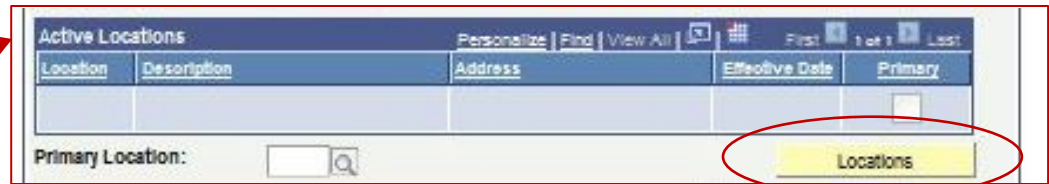


The screenshot displays the 'Organization Table' interface. At the top, there are two tabs: 'Organization Table' and 'Regional'. Below the tabs, the 'External Org ID' is shown as '104900'. To the right of this field are three icons: a printer, a document, and a speech bubble. Below this is the 'Organization Details' section, which includes a search bar with 'Find | View All' and a pagination indicator 'First 1 of 1 Last'. The form fields are as follows:

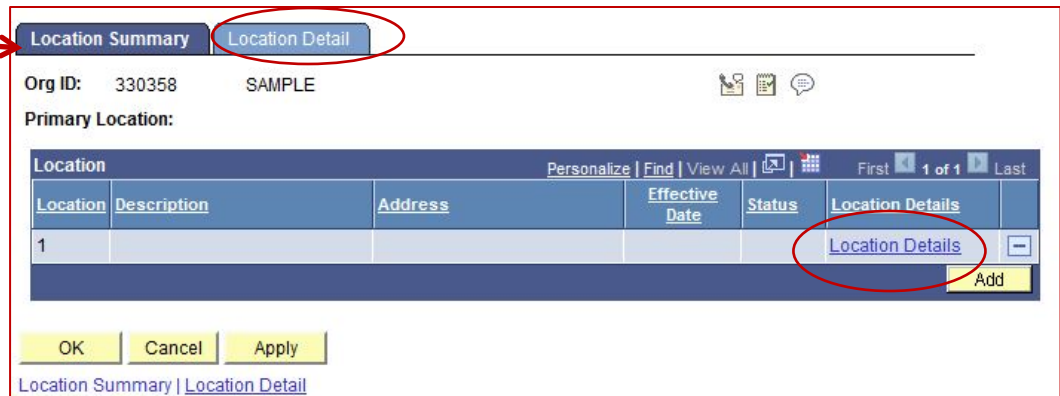
*Effective Date:	09/01/2009	*Status:	Active
*Description:	Middletown High School		
Long Description:	Middletown High School		
Short Description:	Middletown		
*Organization Type:	SCHL	School	
*Proprietorship:	Public		

Populating Active Location Fields– Secondary Institution (Organization Table Page and Location Pages)

To open **Location Pages**, click on yellow **Location** button under **Active Locations**.



Location Summary page opens.



To open **Location Details** page, click on either one of these:

1. The **Location Details** tab,
- or
2. The **Location Details** link.

Populating Active Location Fields– Secondary Institution (Organization Table Page and Location Pages) - continued

Location Details page -

Defaults:

1. Effective Date: Today's Date
2. Status: Active

The screenshot displays the 'Location Detail' page for a secondary institution. The 'Org ID' is 330358 and the 'Primary Location' is 'SAMPLE'. The 'Location History' section shows a single entry with an 'Effective Date' of 04/16/2014 and a 'Status' of 'Active'. Below this, there are fields for 'Description', 'Short Desc', 'Country', and 'Address'. The 'Electronic Addresses' section includes fields for 'Email ID', 'URL Address', and 'EDI Address'. At the bottom, there is a 'Location Phones' table and a 'Last Update Date/Time' field. The page concludes with 'OK', 'Cancel', and 'Apply' buttons.

Phone Type	Code	Phone	Extension	Preferred

Populating Active Location Fields– Secondary Institution (Organization Table Page and Location Pages) - continued

Location Detail Page:

1. **Effective Date:**
 - a. Must be either the same date as that under Organization Details, or
 - b. Less than that under Organization Details. In this example, it is the same date.
2. **Status:** Remains Active.
3. **Description:** Generally, should be the same as 30-character Description under Organization Details.
4. **Short Desc:** Generally, should be the same as the 10-character Short Description under Organization Details.
5. **Country:** Add Country Code
6. **Edit Address:** To populate the Address fields, click on the Edit Address link.

The screenshot displays the 'Location Detail' page for 'Middletown High School'. The page is divided into several sections:

- Location Summary:** Shows 'Org ID: 104900' and 'Middletown High School'.
- Location Detail:** Shows 'Primary Location: 1 Middletown High School'.
- Location:** Shows 'Location: 1'.
- Location History:** Shows 'Effective Date: 09/01/2009', 'Status: Active', '*Description: Middletown High School', 'Short Desc: Middletown', 'Country: USA United States', and 'Address: 200 LaRosa Lane Middletown, CT 06457'. The 'Edit Address' link is circled in red.
- Electronic Addresses:** Fields for 'Email ID:', 'URL Address:', and 'EDI Address:'.
- Location Phones:** A table with columns for '*Phone Type', 'Prefix', 'Phone', 'Extension', and 'Preferred'.

At the bottom of the page, there are 'OK', 'Cancel', and 'Apply' buttons, and a footer with 'Location Summary | Location Detail'.

Populating Active Location Fields– Secondary Institution (Organization Table Page and Location Pages) - continued

Blank Edit Address page:

1. There are no defaults.
2. **Country:** Pre-filled from previous page.
3. If Country needs to be changed, click on the Change Country link.

Edit Address

Country: United States [Change Country](#)

Address 1:

Address 2:

Address 3:

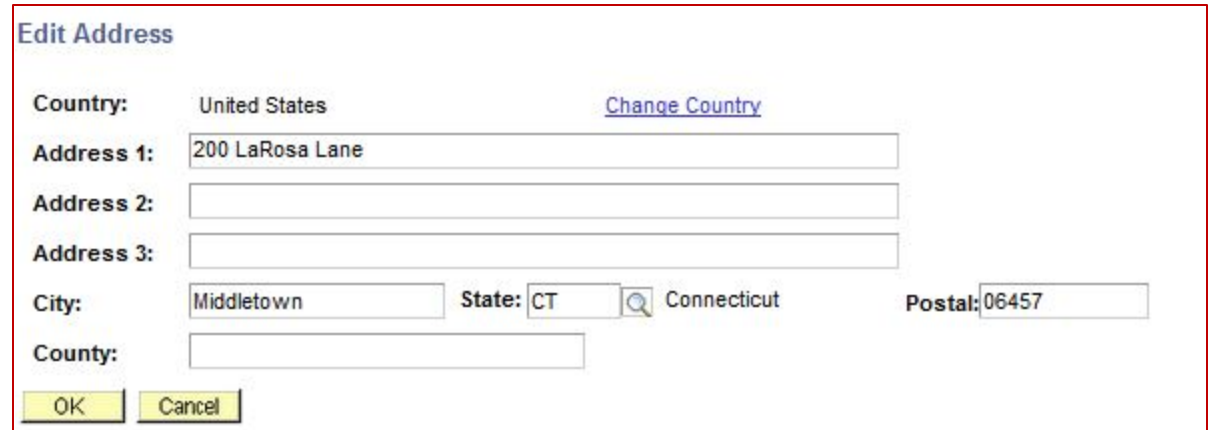
City: **State:** **Postal:**

County:

Populating Active Location Fields– Secondary Institution (Organization Table Page and Location Pages) - continued

Filled Edit Address page:

1. This is the minimum address information that should be displayed.
2. There are no defaults.
3. **Country:** Pre-filled from previous page.
4. If Country needs to be changed, click on the Change Country link.
5. **Address 1 through 3:** Enter street address information
6. **City:** City spelled out in full.
7. **State:** If in the United States or Canada only, enter applicable State or Province Code
8. **Postal:** If in the United States or Canada only, enter Postal Code.



The screenshot shows a web form titled "Edit Address". The form contains the following fields and values:

- Country:** United States (with a blue link "Change Country" to its right)
- Address 1:** 200 LaRosa Lane
- Address 2:** (empty)
- Address 3:** (empty)
- City:** Middletown
- State:** CT (with a dropdown arrow icon) Connecticut
- Postal:** 06457
- County:** (empty)

At the bottom of the form are two buttons: "OK" and "Cancel".

Populating Active Location Fields– Secondary Institution (Organization Table Page and Location Pages) - continued

Organization Table Page – Active Locations Section

1. The Location must be set as the **Primary Location**.
 - a. Click on the magnifying glass next to **Primary Location**
 - b. Select Location Nbr 1.
 - c. Note that the checkbox under **Primary** is now checked.
2. Click Save.

Location	Description	Address	Effective Date	Primary
1	Middletown High School	200 LaRosa Lane Middletown, CT 06457	09/01/2009	<input checked="" type="checkbox"/>

Primary Location: 

Locations

Populating School Data (Organization Type Related Information)

On the **Organization Table** page, click on the link at the bottom beneath the label Organization Type Related Information (In this example, the default of School)



The **School Data** page opens.

1. Four fields at the top were created in previous steps.
 - a. **Effective Date:** Must be either the same date as that under **Organization Details**, or
 - b. Less than that under **Organization Details**. In this example, it is the same date.
2. **Status:** Active
3. **Offers Courses:** **Must be checked.**
4. **School type:** Secondary or College
5. **ATP Code:** Actual Code or Code designated by appropriate department.

The screenshot shows the "School Data" form for "Middletown High School" (Org ID: 104900). The form is divided into several sections:

- Organization Details:** Includes "Effective Date" (09/01/2009), "Offers Courses" (checked), and "*Status" (Active). The "Effective Date" and "Offers Courses" fields are circled in red.
- School Characteristics:** Includes "Accredited" and "Transcript Translation" checkboxes.
- School Type:** A dropdown menu set to "Secondary".
- School Codes:** Includes "ATP" (070400), "FICE", "ACT", "IPEDS", and "NCES" fields. The "ATP" field is circled in red.
- System Default Values:** Includes "Career" (High Schl), "Term Type" (Semester-I), and "Unit Type" (Semester) dropdowns.
- Catalog Information:** Includes "School District", "Shared Catalog" checkbox, "Catalog Org", and "School Code" fields.

At the bottom of the form are "OK", "Cancel", and "Apply" buttons.

- End of demonstration -