# 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)
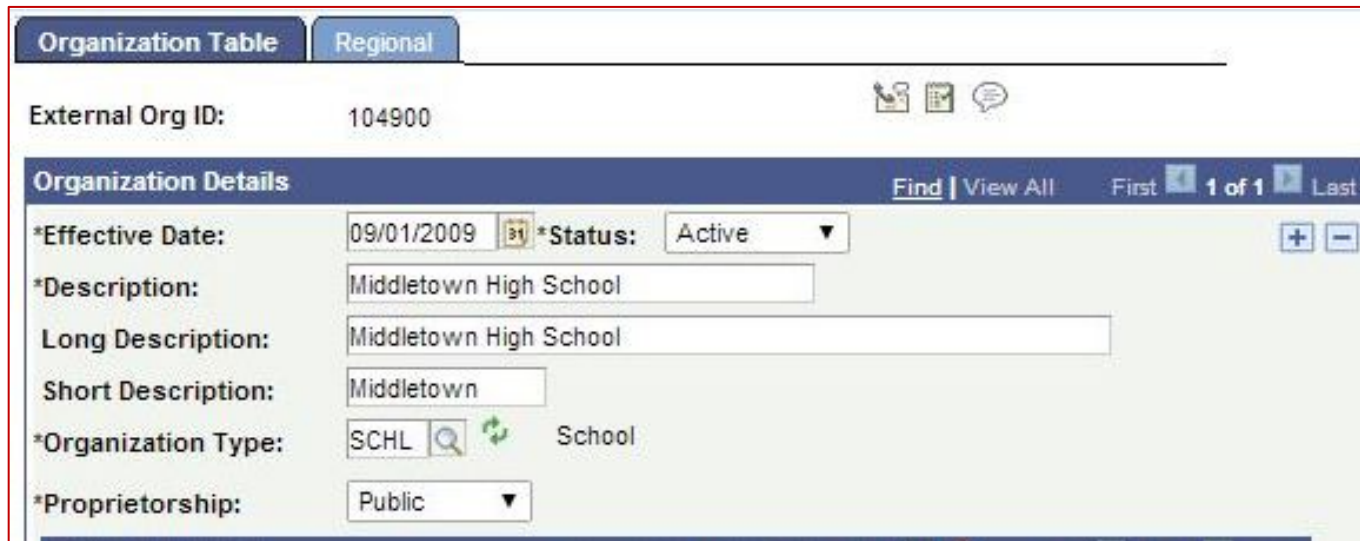
# Populating Organization Details – Secondary Institution (Organization Table Page)

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)
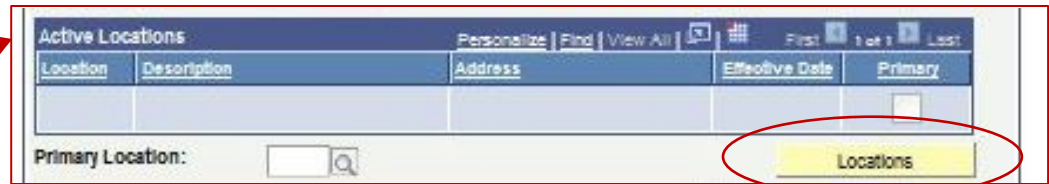8. **Proprietorship:** Default of Public is retained.

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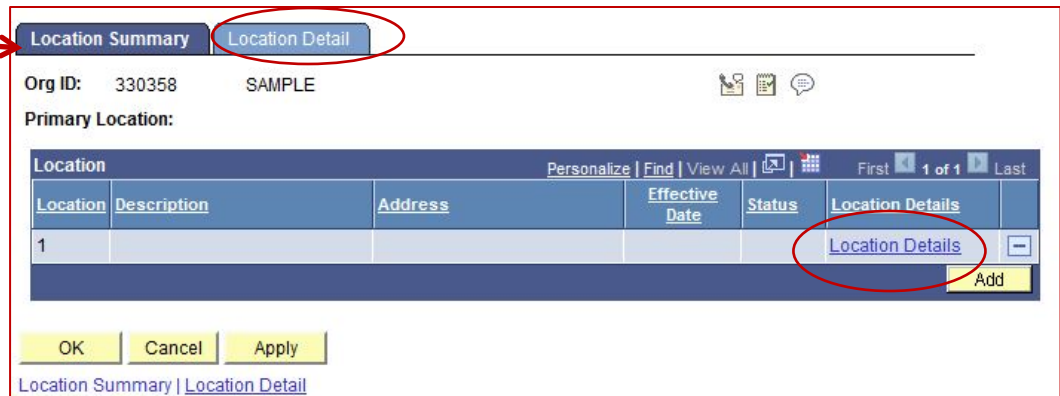
To open Location Details page, click on either one of these:

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

# 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.

# 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: | |

[ OK ]  [ Cancel ]
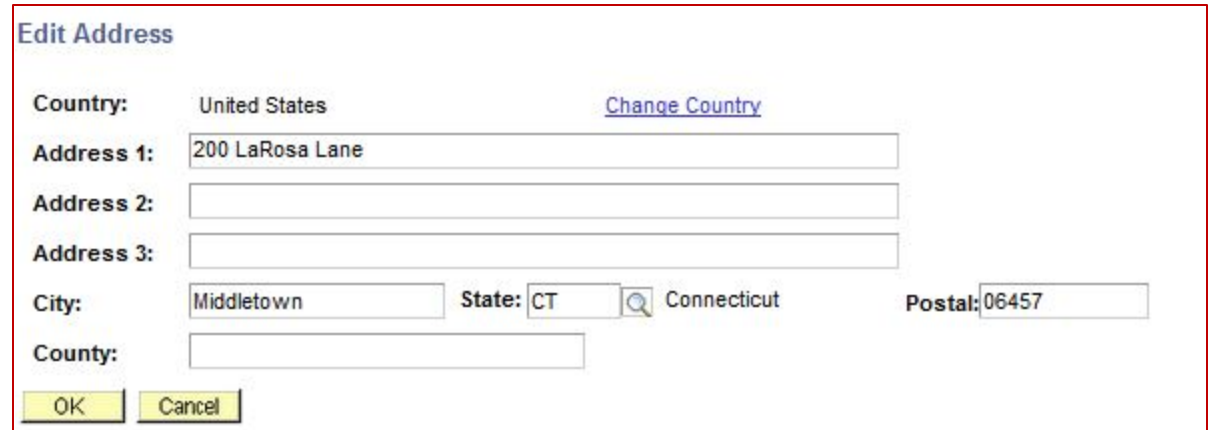
# Populating Active Location Fields– Secondary Institution (Organization Table Page and Location Pages) - continued

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.

**Edit Address**

| | | |
|---|---|---|
| Country: | United States | Change Country |
| Address 1: | 200 LaRosa Lane | |
| Address 2: | | |
| Address 3: | | |
| City: | Middletown | State: CT 🔍 Connecticut    Postal: 06457 |
| County: | | |

OK    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.

# 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.



**- End of demonstration -**