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# PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook

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# PeopleSoft Campus Solutions Preface

This preface discusses:

- PeopleSoft products.
- Campus Solutions application fundamentals.
- Deferred processing.

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**Note.** This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

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## PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft Academic Advisement.
- PeopleSoft Campus Community.
- PeopleSoft Recruiting and Admissions.
- PeopleSoft Contributor Relations.
- PeopleSoft Financial Aid.
- PeopleSoft Gradebook.
- PeopleSoft Student Financials.
- PeopleSoft Student Records.
- PeopleSoft Campus Self Service.

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## Campus Solutions Application Fundamentals

The PeopleBooks for each PeopleSoft application provide implementation and processing information for the Campus Solutions system. However, additional, essential information describing the setup and design of the system appears in two companion volumes of documentation:

- *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook* (this PeopleBook).
- *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*.

Each PeopleSoft product line has its own version of this documentation.

*PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the Campus Solutions product line. Whether you are implementing only one application, some combination of applications within the product line, or the entire Campus Solutions system, you should be familiar with the contents of this central PeopleBook (the book you are reading). It is the starting point for fundamentals, such as setting up control tables and administering security.

*PeopleSoft Campus Community Fundamentals 9.0 PeopleBook* provides documentation on the Campus Community features that are basic to all the applications. Campus Community enables you to maintain and manage a wide range of biographic and demographic information on people and organizations of interest to an institution, both internal and external.

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## Deferred Processing

Several pages in the Campus Solutions applications operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

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## PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.



## Chapter 1

# Getting Started with Campus Solutions

This chapter discusses:

- Campus Solutions overview.
- Campus Solutions business processes.
- Campus Solutions integrations.
- Integration prerequisites and dependencies.
- Campus Solutions implementation.

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## Campus Solutions Overview

This section provides an overview of the Campus Solutions applications. Specifically, it provides overviews of:

- PeopleSoft Campus Community.
- PeopleSoft Recruiting and Admissions.
- PeopleSoft Student Records.
- PeopleSoft Academic Advisement.
- PeopleSoft Financial Aid.
- PeopleSoft Student Financials.
- PeopleSoft Contributor Relations.
- PeopleSoft Campus Self Service.

### ***PeopleSoft Campus Community***

Campus Community enables you to maintain and manage a wide range of basic information about people and organizations of interest to the institution. Each application within Campus Solutions relies on this data which includes an individual's or organization's name, address, and system ID.

Campus Community provides the following functionality:

- *Personal Information Management*– This functionality enables you to create and maintain personal data to identify the individuals who comprise the campus community, including names and addresses.

You can also track personal attributes such as languages, ethnicity, and religious preferences, and health , identification, and participation information. You also set FERPA control and manage system IDs here.

- *Organization Data Management*– This functionality enables you to maintain data about the schools and other organizations important to the institution, including addresses, contact names, and phone numbers.
- *(USA) SEVIS (Student and Exchange Visitor Information System) Visa Processing* – This functionality enables you to create and maintain foreign visas data about student (F/M) and exchange visitor (J-1) visas and relevant dependent data.

This functionality includes the ability to submit required information to the US Department of Homeland Security (DHS) and incorporate updated information received from DHS.

- *The 3Cs*– This functionality (communications, checklists, and comments) enables you to create, track, and assign interactions with prospects, applicants, students, alumni, donors, and external organizations.

The 3Cs are shared across all of Campus Solutions; this is important to consider when designing a 3C setup.

- *Communication Management*– Enables you to manage the institution's incoming and outgoing contacts with students, prospects, recruits, staff, alumni, donors, and organizations.
- *Checklist Management*– Enables you to create lists to track activities and dues dates, and identify their status at any time.
- *Comment Management*– Enables you to enter notes in the database about individuals, organizations, or events.

## ***PeopleSoft Recruiting and Admissions***

Recruiting and Admissions administers the institution's admission process by managing recruiters and tracking prospects and applicants. Admissions offices have the ability to empower prospective students through the self-service applications offered with Recruiting and Admissions includes automated processes such as application evaluations, external test score loading, recruitment category assignment, application loading from test score data, and academic transcript loading using the PeopleSoft EDI Manager tool.

The system's integration with Campus Community, Student Records, Student Financials, Financial Aid, and Academic Advisement reduces repetitive entry and enhance ease of communication across the institution's various departments. For example, when an applicant matriculates, her record automatically appears in Student Records.

Recruiting and Admissions includes this functionality:

### *Comprehensive Recruiting Capabilities*

After you create a record for a prospective student, you can store extensive recruiting and education information. Communication, checklist, and comment tools help you tailor contact to meet their individual needs.

- Capture information about prospective students by means of the new request for information form or through data uploaded from search and testing databases.



- Maintain information about recruiters, including their role, the types of students they work with, the regions they serve, and their special interest areas.
- Assign regions, categories, and recruiters to a group of prospects based on a variety of selection criteria. For example, bio/demographic data, address data such as state and postal code, recruiting status, and recruiting center.
- Organize prospective students and applicants by geographic region, interests, extracurricular activities, their level of interest, and more.
- Plan and coordinate recruitment events for different programs targeting specific student populations.
- Develop tailored communication plans based on prospect's or applicant's individual characteristics.
- Load and assign EPS™ (Enrollment Planning Service) market codes to external organizations to help focus recruiting activities.
- Collect and analyze data about recruiting activities such as college fairs, open houses, recruiting trips, interviews, mailings, and publications.

### *Flexible Application Processing*

Tailor the recruiting and admissions system according to the institution's unique requirements and practices. Recruiting and Admissions handles both manual and background processing.

- Maintain multiple applications for an individual applicant.
- Tailor admission requirements and processing for each academic program.
- Enable applicants to track application status history through the web.
- Create admission rating schemes and criteria for automated evaluations.
- Load transcripts, tests, and applications from external agencies and central application services.
- Enable an applicant to accept or decline their admission as well as pay their deposit fee online.
- Update applicant status automatically based on a program's individually defined criteria.
- Automate evaluations and updates of admission decisions.
- Set up expert data entry to ease data entry.
- Admit students without going through the formal admissions process with Quick Enroll/Admit.
- Quickly delete a prospect or applicant record entered in error.

Recruiting and Admissions includes a variety of summary information pages that provide easy access to data, enabling institutions to make informed day-to-day admissions decisions.

### *Enrollment Management Features*

Set enrollment management targets for specific groups you define by academic institution, career, and term. You can further specify targets by admit type, program status, academic program, gender, and ethnic group. Recruiting and Admissions automatically calculates current enrollment target results.

- Design a three-level hierarchical structure of enrollment targets with the ability to group and link the levels however you want.

- Display enrollment target results at any time to track progress toward institutional recruiting efforts.
- View a list of people who meet the target selection criteria.
- Create new targets by using the template feature to copy the details you want from existing targets.
- Generate enrollment management reports listing the target and actual levels the institution has defined.
- Measure the success of admissions decisions. For example, you can look at how many enrolled students eventually graduate.

### ***PeopleSoft Student Records***

Student Records enables you to enter, track, and process all of the academic information. PeopleSoft minimizes repetitive data entry while enabling you to gain maximum control over the records—from the course catalog and schedule of classes to student programs, plans, and subplans.

After applicants are admitted and matriculate, Student Records moves forward to activate, enroll, grade, evaluate, and graduate students. In conjunction with the Academic Advisement processes, the Student Records application tracks students through graduation.

The major features within Student Records are:

- Course catalog.
- Schedule of classes.
- Repeat checking.
- Instructor workload.
- Enrollment.
- Transfer credit processing.
- Attendance tracking.
- Student grading.
- Student data tracking.
- Transcripts.
- Academic statistics.
- Enrollment verifications.
- Graduation processing.
- LMS (Learning Management Systems) integration.

### ***PeopleSoft Academic Advisement***

Academic Advisement is the application within Campus Solutions that is used to track the requirements and policies that a student must satisfy to graduate. As a student progresses toward graduation, Academic Advisement analyzes those courses completed by the student—both successfully and unsuccessfully—and ascertains what requirements are still outstanding.

Using data from Student Records and requirements entered in Academic Advisement, this application automatically tracks a student's degree progress. After you enter requirements into the system, you can analyze a student's data against the requirements to report degree progress. You can also perform what-if scenarios for student to see what courses they might need to complete for a particular major.

With this application, you can:

- Set up and view academic course lists, requirements, and requirement groups.
- Share courses.
- Modify existing requirements and make exceptions for a specific student.
- Generate advisement reports.

### ***PeopleSoft Financial Aid***

Financial Aid provides a powerful and flexible tool to manage the operations of an institution's financial aid office. The system starts with Federal and Institutional Aid applications and leads you through automated need calculations, budgets, awards, disbursements, loan processing, and tracking data. Support of Department of Education regulations are incorporated into Financial Aid on a regular basis so that the institution remains in compliance with Department of Education regulations and has access to new federal aid initiatives. Financial Aid helps you process and track loan applications under the federal Direct Lending and Federal Family Educational Loan Program (FFELP), along with state, university, and alternative loan programs more efficiently and effectively.

With this application, you can:

- Establish the general processing for your financial aid office, including award cycles and terms, aid eligibility and packaging, budgets, and application processing options.
- Process multiple types of aid applications and assess student eligibility.
- Award, package, and disburse aid to students.
- Set up and administer CommonLine, Common Record CommonLine, and Direct loan programs.
- Manage Pell payments and Title IV funds.
- Manage students' work study.
- (CAN) Set up and process Canadian financial aid applications.
- Manage the Fiscal Operation Report and Application to Participate (FISAP).

### ***PeopleSoft Student Financials***

Student Financials is a tool for higher education institutions to manage student receivables, billing, collections, and cashiering. Using Student Financials, both staff and students can quickly find and use the financial information they need to make critical decisions.

Student Financials receives information from virtually all areas of Campus Solutions. With this application, you can:

- Calculate fees and tuition.

- Maintain customer account information.
- Create bills.
- Establish payment plans.
- Refund tuition and fees.
- Perform cashiering.
- Process collections.
- Interface with a general ledger system.
- Set up and print tax forms.

### ***PeopleSoft Contributor Relations***

Contributor Relations is a comprehensive solution that helps contributor relations professionals to optimize strategic planning and decision making. The application integrates with other PeopleSoft applications within Campus Solutions, Financials, and Human Resources to create an enterprise-wide organizational solution.

Using Contributor Relations, you can implement strategic plans for the handling of constituents, and manage complex campaign efforts, multifaceted events, volunteer efforts, and membership drives using the initiative management feature. Contributor Relations includes a comprehensive gift processing feature that handles the entry of gift, pledge, and membership transactions. This component includes functionality for handling matching gifts, tribute and memorial gifts, acknowledgements, and giving club membership.

Contributor Relations supports all major components of a philanthropic or nonprofit organization in one application. Contributor Relations' eight component functions are completely integrated, enabling efficient workflow, effective data tracking and retrieval, sophisticated reporting features, and cohesive common processes throughout the enterprise.

The eight component functions within Contributor Relations are:

- Constituent Information
- Gift and Pledge
- Prospect Manager
- Event Manager
- Campaign Manager
- Volunteer Manager
- Membership Manager
- Planned Giving

### ***PeopleSoft Campus Self Service***

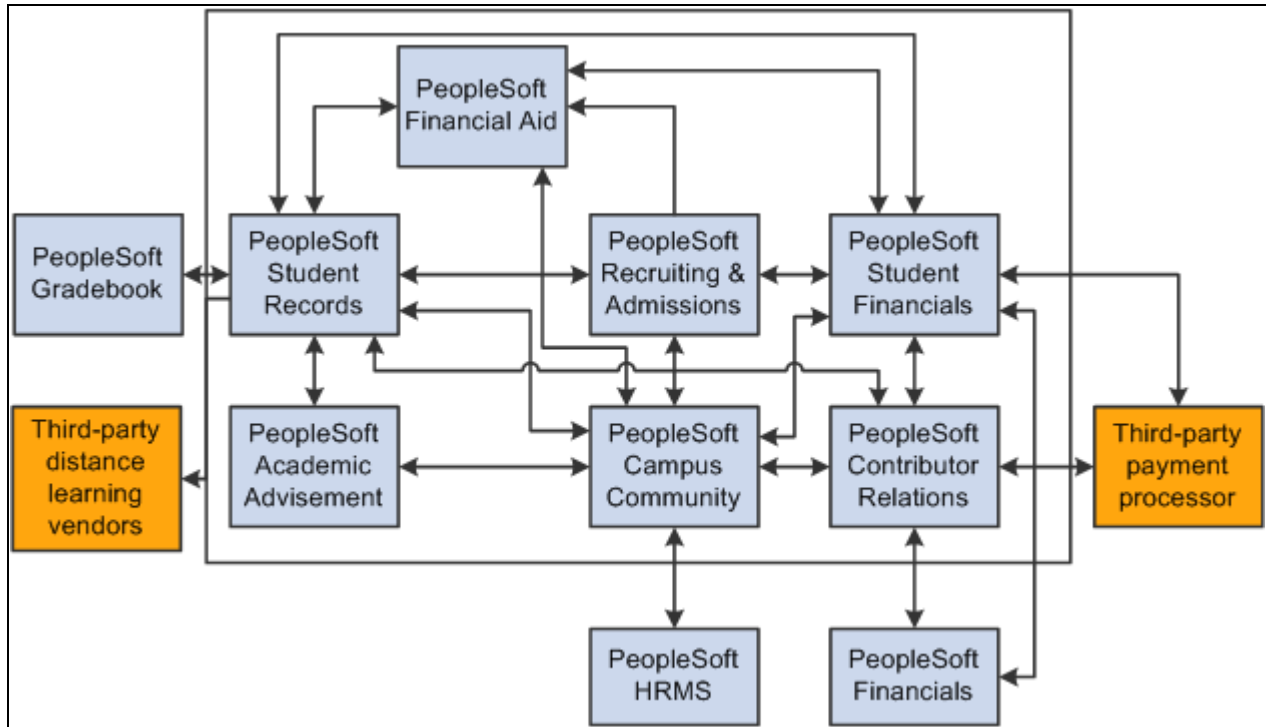
Campus Solutions offers Campus Self Service as a separately licensed product. If you have licensed Campus Self Service, you can use the self-service pages described in the *PeopleSoft Campus Self Service 9.0 PeopleBook*

Self-service applications bring multiple transactions together into a single unit. You can use self-service pages to provide system access to students, applicants, alumni, faculty, visitors, and other users and allow them to perform a variety of self-service transactions.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Understanding PeopleSoft Campus Self Service."

## Campus Solutions Integrations

The following process flow illustrates the high-level Campus Solutions business processes:



Campus Solutions 9.0 integrations

## Implementation Prerequisites and Dependencies

This section provides an overview of the dependencies within Campus Solutions and discusses implementation considerations for:

- Campus Community and institutional structure.
- Student Records.
- Recruiting and Admissions.
- Academic Advisement.
- Financial Aid.

- Student Financials.
- Contributor Relations.
- Gradebook.

Each product's PeopleBook discusses the product's business processes, integrations, and implementation considerations in greater detail.

### ***Understanding Dependencies Within Campus Solutions***

Before you use Campus Solutions, load the tables in the proper order. When populating tables in Campus Solutions, it is important that you load data in a prescribed sequence. This sequential order takes into account each table's data dependencies and hierarchical layers. For example, institutional structure must be defined first because all of the applications in Campus Solutions are dependent on the basic structure you set up for the institution.

Before you implement Campus Solutions, decide the order in which to implement each application. For example, you may need to "go live" with Financial Aid before completing the implementation of Student Financials. By reviewing the information for Financial Aid, you see that you must set up Item Types in Student Financials before you can set up Financial Aid Item Types. With this knowledge, Financial Aid and Bursar's staff can work together to make the necessary accommodations to the system.

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**Note.** In addition to reviewing this information it is also recommended that you review the documentation on data conversion and shared values between Campus Community and the PeopleSoft Human Resources Management system.

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**Warning!** Because of dependencies between applications, it is important that you take the information that follows into consideration prior to beginning the application setup process.

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### ***Preparing for Campus Community and Institutional Structure***

If you have licensed PeopleSoft Human Resources Management or PeopleSoft Financials, you will want to coordinate the setup of the following:

- Person IDs.
- Personal attributes.
- Organization IDs.
- Organization locations, campuses, departments, and facility tables.

Detailed information for setting these up in Campus Solutions can be found in the *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*.

### ***Preparing for Student Records***

Detailed information for these setup tasks can be found in the *PeopleSoft Student Records 9.0 PeopleBook*.

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Student Records system.

- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the Student Records needs of these features are in place.
- Coordinate the setup of General Ledger options and Fees with Student Financials and Financials.
- Coordinate the setup of Instructor and Advisor Personal Data with Human Resources.
- Coordinate the setup of transcripts with Academic Advisement.

### ***Preparing for Recruiting and Admissions***

Detailed information for these setup tasks can be found in the *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*.

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence and selected parts of the Student Records setup sequence must be completed prior to setting up the Recruiting and Admissions system.
- Coordinate the setup of School Subject and External Courses for transcript credit purposes with Student Records.
- Coordinate the setup of Application and Deposit Fees with Student Financials.
- Coordinate the setup of Early Financial Aid Offers and Prospect Cross Reference with Financial Aid.

### ***Preparing for Academic Advisement***

Detailed information for these setup tasks can be found in the *PeopleSoft Academic Advisement 9.0 PeopleBook*.

Preliminary setup tasks:

- Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Academic Advisement system.
- Student Records must be set up before beginning the set up of Academic Advisement.

In particular, a transcript type for Academic Advisement must be created so you can run advisement reports.

- An active student must be set up in Campus Community and Recruiting and Admissions before you can run an academic advisement report or set up student exceptions.
- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the Academic Advisement needs of these features are in place.

### ***Preparing for Financial Aid***

Detailed information for these setup tasks can be found in the *PeopleSoft Financial Aid 9.0 PeopleBook*.

Preliminary setup tasks:

- The Institutional Structure/Campus Community, Recruiting and Admissions, and Student Records setup sequences must be completed prior to setting up the Financial Aid system.

- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the FAN letter and other financial aid needs of these features are in place.
- Coordinate the setup of Early Financial Aid Offers and Prospect Cross Reference with Recruiting and Admissions.
- Coordinate the setup of item types and keywords with Student Financials.

Establish the Item Group FA-BUDGET with Student Financials and set up the Financial Aid Origin to be used for disbursing aid.

### ***Preparing for Student Financials***

Detailed information for these setup tasks can be found in the *PeopleSoft Student Financials 9.0 PeopleBook*.

Preliminary setup tasks:

- The Institutional Structure/Campus Community, Recruiting and Admissions, and Student Records setup sequences must be completed prior to setting up the Student Financials system.
- Coordinate the setup of General Ledger options with the Financials system counterparts to ensure you are using valid account and ChartField combinations.
- If you run Student Financials refunding through PeopleSoft Payroll or PeopleSoft Accounts Payable, coordinate refunding options with the Financials system counterparts.
- Review 3Cs—Communications, Checklists, and Comments—and service indicator setup to make sure the Student Financials needs of these features are in place.
- Coordinate the setup of item types and keywords with Financial Aid and Contributor Relations.
- Coordinate the setup of application and deposit fees with Recruiting and Admissions.

### ***Preparing for Contributor Relations***

Detailed information for these setup tasks can be found in the *PeopleSoft Contributor Relations 9.0 PeopleBook*.

Preliminary setup tasks:

- Complete the Institutional Structure/Campus Community setup sequence, including departments, before setting up the Contributor Relations system.
- Coordinate the setup of item types with Student Financials.

This setup is required prior to completing Contributor Relations gift or membership setup.

### ***Preparing for Gradebook***

Detailed information for these setup tasks can be found in the *PeopleSoft Gradebook 9.0 PeopleBook*.

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Gradebook system.



- Student Records must be set up before beginning the setup of Gradebook.

In particular, the course catalog must be populated. Additionally, classes must be scheduled and students must be enrolled to use the Gradebook.

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## Campus Solutions Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for an organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Campus Solutions also provides component interfaces to help you load data from the existing system into Campus Solutions tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables. Each product's specific component interfaces are discussed in the Getting Started chapter of its PeopleBook.

### **Other Sources of Information**

In the planning phase of an implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface, with information about where to find the most current version of each.

### **See Also**

"PeopleSoft Campus Solutions Preface," page xix

*PeopleTools PeopleBook: PeopleSoft Setup Manager*

*PeopleSoft Setup Manager for PeopleSoft HRMS and Campus Solutions 9.0 PeopleBook*



## Chapter 2

# Introducing Business Units and Data Sharing

This chapter provides overviews of PeopleSoft business units and data sharing among business units and discusses how to:

- Select a business unit structure.
- Implement tableset sharing.

---

## Understanding PeopleSoft Business Units

Before you implement the Campus Solutions applications for an institution, take a close look at how the institution functions operationally. To make the most of PeopleSoft's flexible design, you have to first decide how you want to map the operational structures into PeopleSoft applications.

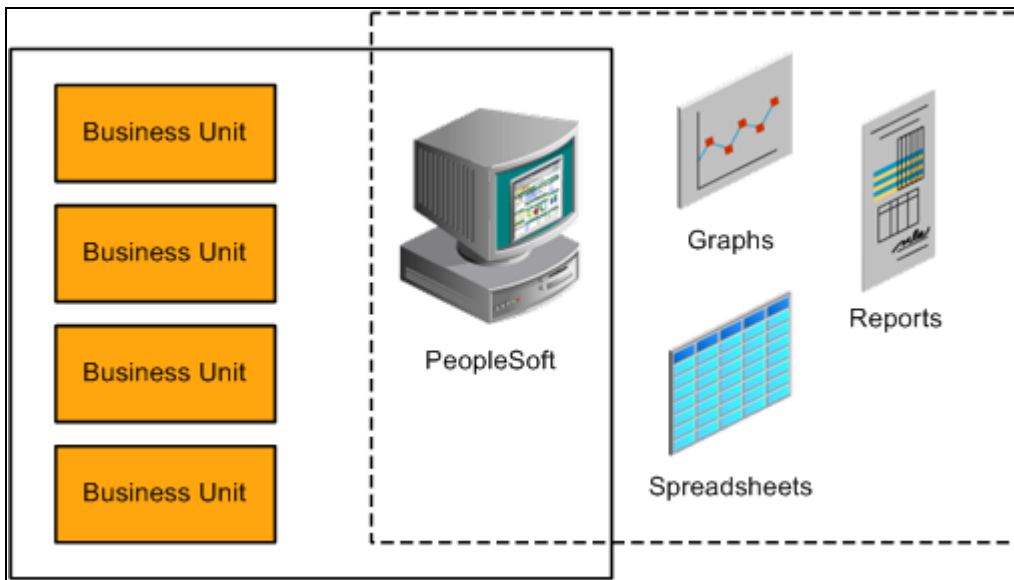
In a PeopleSoft system, a business unit is an operational subset of an organization. Business units can be independent legal entities, or organizations that need to segregate their financial data for accounting purposes, or operational centers that segregate their operations for management purposes.

Business unit names can vary among the different applications within the PeopleSoft system. For example, PeopleSoft Student Financials and PeopleSoft General Ledger business units typically consist of different entities for financial and tax reporting purposes. You can share business units across any combination of applications in Campus Solutions, or you define them within a single application. If the entire institution keeps only one set of books, then you can have a single business unit. You must have one business unit defined for each PeopleSoft application installed, but all applications can share the same business unit. A minimum of one business unit is required for the entire suite of applications in the Campus Solutions system.

How you define a business unit depends on the institutional structure, requirements, or reporting demands, as well as how you've organized operating responsibilities. For example, an institution might separate technical or graduate school operations from its main campus operations. Transactions are stored by business unit. Reports and processes are requested by business unit and security can be enforced by business unit.

Although each business unit keeps its own set of books, the institution can still maintain a single, centralized database, reducing the effort of maintaining redundant information for each business unit and ensuring consistent and accurate consolidated results. In addition, you can produce reports across business units, enabling you to obtain a broad overview or to compare detailed information.

This diagram illustrates how centralized data enables analysis and reporting across business units:



Benefits of centralized data

---

## Understanding Data Sharing Among Business Units

The PeopleSoft system uses business units to separate organizations within the institution. Although each business unit represents a separate organization, there is data that is shared throughout the institution. Business units can share data by using tableset sharing, which is a way to share control table information among business units to minimize redundant data and system maintenance tasks.

This section discusses:

- Tableset sharing.
- Control tables keyed by tableset ID.
- Record groups in tableset sharing.
- Business units, tablesets, and record groups.
- Set control values.
- Data sharing.

### Tableset Sharing

Tableset sharing is the sharing of common control tables among business units. There are two types of tables in the PeopleSoft system that are used to store data.

**Control Tables**

These tables store master lists of information; for example, department names and account codes. This data is maintained centrally by the institution and is generally entered once at implementation, and it changes little over time.

The structure and processing rules for each of the PeopleSoft applications you are using are defined in a series of control tables.

Control tables are usually keyed by tableset ID and are usually effective-dated.

**Transaction Tables**

These tables store day-to-day business activity and are updated frequently. They are keyed by business unit.

Control tables enable you to use *tableset IDs*, which make tableset sharing possible. The tableset ID indicates which of the rows in the control table a particular business unit can access. Each row in the control table has a tableset ID associated with it and business units are associated with tableset IDs through record groups:



Business units and tableset IDs associated through record groups

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**Note.** The *tableset ID* is also referred to as the *setID*. These terms are interchangeable.

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If much of the control table data is the same from business unit to business unit, tableset sharing enables you to share that information among business units instead of having to enter the same data multiple times. For example, suppose that an institution has 10 business units and they all use the same accounts. Instead of having to enter all of the accounts 10 times, you could enter them once and set up tableset sharing to enable all of the business units to access them.

Tableset sharing also enables you to manage exceptions within the organization. For example, suppose that 9 of the 10 business units use the same accounts, but the tenth business unit uses entirely different accounts. This is easily accommodated through tableset sharing.

The two following tables show how different business units access a centralized control table based on tableset ID. In the example, there are three tableset IDs—MAINC, EASTC, and WESTC—representing three campuses. The account number information for all campuses is contained in a single control table. Allowing access to certain tableset IDs can restrict access to the account number information. For example, East Campus (EASTC) can view only its two account numbers when it accesses the control table.

Here are the accounts for all three campuses:

<b>Tableset ID</b>	<b>Account Number</b>
MAINC	0000090345
MAINC	0000090346
EASTC	0000090347
MAINC	0000090348

<b>Tableset ID</b>	<b>Account Number</b>
EASTC	0000090349
WESTC	0000090350

This view shows only the accounts for East Campus:

<b>Tableset ID</b>	<b>Account Number</b>
EASTC	0000090347
EASTC	0000090349

**See Also**

*PeopleTools PeopleBook: Data Management, "PeopleTools Utilities"*

## Control Tables Keyed by Tableset ID

Here are some examples of the control tables keyed by tableset ID for each application in Campus Solutions. This information can help you decide how the data can be segmented, so that you make the correct decisions when setting up the tableset IDs and assign the correct tableset IDs to record groups.

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**Note.** This list is not exhaustive.

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This table lists some examples of control tables keyed by tableset ID:

<b>PeopleSoft Application</b>	<b>Control Tables Keyed by Tableset ID</b>
PeopleSoft Student Records	FACILITY_TBL - Facility LOCATION_TBL - Location GRADESCHEME_TBL - Grading Schemes LVL_LD_RULE_TBL - Level/Load Rules PROG_RSN_TBL - Program Action Reasons REPEAT_SCHM_TBL - Repeat Schemes TIME_PERIOD_TBL - Time Periods UNIT_CONVR_TBL - Unit Conversions

<b>PeopleSoft Application</b>	<b>Control Tables Keyed by Tableset ID</b>
PeopleSoft Student Financials	ACCT_TYP_TBL_SF - Account Types ACC_AGE_FEE_TBL - Aging Late Fee table ACC_AGING_TBL - Account Aging table ADJ_CODE_TBL - Adjustment Code table ADJ_REASON_TBL - Adjustment Reason table ADJ_TERM_CD_TBL - Adjustment Term Code table ADJ_TERM_TBL - Adjustment Term table AGING_CAT_TBL - Aging Category table AGING_TBL - Aging table APP_FEE_CD_TBL - App Fee Code table APP_FEE_TBL - Application Fee table APP_FEE_TND_TBL - App Fee Tender and Item Types APP_SF_CD_TBL - App Sub-Fee Code table APP_SUBFEE_TBL - App Sub Fee table BANK_ACCT_MTHD - Bank Account Payment Method BI_ACCT_STD_REQ - Accounts for Std Req BI_ACDPROG_STAT - Std Req Academic Prog Status BI_ADMPROG_STAT - Std Req Admissions Prog Status BI_BILL_MSG_TBL - Billing Msg table for SF BI_CAR_STD_REQ - Career for Std Req BI_COM_STD_REQ - Communication Std. Request BI_IVC_FIELDS - Billing Invoice Field table BI_IVC_LAYOUT - Billing Invoice Layout BI_MSG_CAT_TBL - Billing Message Cat table BI_PRINT_RQST - Billing Standard Print Request BI_REQ_MSG - Billing Request Message BI_STD_REQ_GRP - Billing Student Groups BI_STD_REQ_TBL - Billing Standard Request table BI_TERM_STD_REQ - Terms for Std Req BI_TYPE_TBL - Billing Type table BNK_RCN_INP_LAY - Bank Recon Input File Layout

<b>PeopleSoft Application</b>	<b>Control Tables Keyed by Tableset ID</b>
PeopleSoft Student Financials (cont.)	BNK_RCN_INP_TRN - Bank Transaction Code CALC_CNTL_SESS - Tuition Calc Control Sessions CALC_CNTL_TBL - Tuition Calculation Controls CALC_CNTL_TERM - Tuition Calc Control Terms CALC_ON_REFUND - Calc on Refund Control CLASS_FEE_TBL - Class Fee table CLASS_SBFEE_TBL - Class Sub Fee table CLST_FEE_TBL - Course Fee table CLST_SBFEE_TBL - Course Sub Fee table CLS_CANCEL_SF - Class Cancellation Code table COLL_LTRITM_TBL - Collection Letter Item table COLL_LTRTMP_TBL - Collection Letter Template table CO_VOID_RSN_TBL - Void Reasons CREDIT_CARD_TYP - Credit Card Type CRSE_FEE_ID_TBL - Course Fee ID table CRSE_FEE_TBL - Course Fee table CRSE_LST_DTL_SF - Course List Detail CRSE_LST_HDR_SF - Course List Header CRSE_RATE_TBL - Course Rate table CRSE_RT_ID_TBL - Course Rate ID table CRSE_SBFEE_TBL - Course Sub Fee table DEP_DUE_DT_TBL - Deposit Date table DEP_FEE_CD_TBL - Deposit Fee Code table DEP_FEE_TBL - Deposit Fee table DEP_FEE_TRM_TBL - Deposit Fee Term table DISP_ERR_CNTL - Display Error/Warn Control DUE_CODE_TBL - Due Date Code table DUE_DATE_CD_TBL - Due Date Code table DUE_DATE_TBL - Due Date table



<b>PeopleSoft Application</b>	<b>Control Tables Keyed by Tableset ID</b>
PeopleSoft Student Financials (cont.)	EG_PROJECT - E&G Operational Projects FEE_CLASS_TBL - Fee Class table FEE_TBL - Fee table FINCODE_TBL - FinCode table GL_INTERFACE - General Ledger Interface GL_INT_CD_TBL - General Ledger Dummy Parent GL_INT_DT_TBL - General Ledger Dummy Parent II GROUP_TYPE_SF - Group Type GROUP_TYPE_TBL - Group Type ITEM_ACCT_TYPE - Valid Account Types ITEM_AGG_TBL - Item Aggregate table ITEM_FA_CD_TBL - Item Type Code table ITEM_GROUP_DTL - Item Type Group Details ITEM_GROUP_TBL - Item Type Group table ITEM_TYPE_1_TBL - Item Type Control table ITEM_TYPE_FISCL - Fiscal Item Type table ITEM_TYPE_FNOTE - Fiscal Item Type Notes table ITEM_TYPE_TBL - Item Type table JRNLGEN_DEFN - Journal Generator Definition LATE_FEE_AGING - Late Fee Aging Category table LATE_FEE_CD_TBL - Late Fee Code table LATE_FEE_LOAD - Late Fee Acad Program table LATE_FEE_PROG - Late Fee Acad Program table LATE_FEE_SCHEME - Late Fee Scheme table LATE_FEE_TBL - Late Fee Setup table LED_FLDS_SF_TBL - ChartFields LED_FLDS_TBL - ChartFields LED_SF_TBL - ChartFields Parent Rec LINE_REASON_TBL - Line Reason table

<b>PeopleSoft Application</b>	<b>Control Tables Keyed by Tableset ID</b>
PeopleSoft Student Financials (cont.)	MAX_FEE_ADM_TRM - Max fee for Admit Term MIN_MAX_FEE - Min/Max fee table MIN_MAX_FEE_CAR - Min/Max fee for Acad Career MIN_MAX_FEE_PGM - Min/Max Fee for Acad Program MIN_MAX_FEE_SES - Min/Max Fee for Session MIN_MAX_FEE_TRM - Min/Max Fee for Term MIN_MAX_FEE_YR - Min/Max Fee for Academic Year OPT_FEE_CAR - Optional Fee Careers OPT_FEE_CD_TBL - Optional Fee Codes table OPT_FEE_TBL - Optional Fees table OPT_FEE_TERM - Optional Fee Terms OPT_FEE_TRM_EF - Optional Fee Effdts for a Term OPT_FEE_TRM_LD - Optional Fee Academic Loads OPT_FEE_TRM_VAL - Optional Fee Values for a Term OPT_FEE_VAL - Optional Fee Values ORIGIN_TBL - Group & Deposit Origins PAY_PRIOR_ALL - Payment Priority Overall PMT_CHRG_PRIOR - Payment Charge Priority PMT_CHRG_TBL - Payment Charge Priority table REASON_IN_TBL - SF Reason In REASON_OUT_TBL - SF Reason Out SEC_ITEM_CLS - Item Security - Perm List SEC_ITEM_OPR - Item Security - User Data SEC_SETID_CLS - User ID Access to SetIDs SEC_SETID_OPR - User ID Access to SetID SEL_VALID_FIELD - Selector Group Valid Fields SEL_VALID_RECS - Selector Group Valid Records SEL_VALUE_OLD - Selector Values table SF_ACCT_CLASS - SF Account Class SPEEDTYP_TBL - Speed Types SPEED_USER_TBL - Work Table for Speed Types

<b>PeopleSoft Application</b>	<b>Control Tables Keyed by Tableset ID</b>
PeopleSoft Student Financials (cont.)	TAX_AUTHORITY - Tax Authority Detail Info TAX_AUTH_HDR - Tax Authority Header Info TAX_CD - Tax Authorities in a Tax Code TAX_HEADER_TBL - Tax Code Header Information TERM_FEE_RES - Term Fee Resident table TERM_FEE_TBL - Term Fee table TERM_FE_CD_TBL - Term Fee Code table TERM_SF_CD_TBL - Term Sub Fee Code table TERM_SUBFEE_TBL - Term Sub Fee table TP_STATUS_TBL - Third-party Contract Status TRANS_FEE_HDR - Transaction Fees Header TRANS_FEE_TBL - Transaction Fees TRANS_FE_CD_TBL - Transaction Fee Codes VALID_RECORD_SF - Valid Records for Selectors VENDOR_SF_TBL - SF to Vendor interface table WAIVER_CODE_TBL - Waiver Code table WAIVER_FORM_TBL - Student Waivers WAIVER_GRP_DTL - Waiver Group Detail table WAIVER_GRP_TBL - Waiver Group table WAIVER_TBL - Waiver table WVR_GRP_CD_TBL - Waiver Group Code table
PeopleSoft Recruiting and Admissions	PSTREEDEFN - PeopleTools table used in the creation of the Region Tree
PeopleSoft Financial Aid	AWD_MESSAGE_TBL - Award Messages/Comments BDGT_REGION_TBL - Budget Region table ITEM_TP_FA_DISB - Item Type Disb Plan/Split Cd ITEM_TYPE_FA - Item Type Table SFAG ITEM_TYP_FA_FEE - Item Type Fee table ITM_TP_TERM_LMT - Award Limits by Term Type LN_FEE_TBL - Loan Fee table LN_ITEM_FEE - Loan Item Type Fee table LN_ITEM_TBL - Loan Item Type table RSTRC_AID_ITEM - Restricted Aid IDs/Item Type

<b>PeopleSoft Application</b>	<b>Control Tables Keyed by Tableset ID</b>
PeopleSoft Contributor Relations	AV_ACCOUNT_TBL - Designation Funds AV_INST_TYP_TBL - Designation Types AV_ITEM_TBL - Donor Appreciation Items AV_MBR_CAT_TBL - Membership Categories AV_MBR_TYP_TBL - Membership Types AV_MTVTN_INTV - Appeals linked to Initiative Codes AV_MTVTN_TBL - Appeal Codes AV_ORIG_DNR_TBL - Original Donors to Designation Funds AV_TENDER_TBL - Tender Types AV_TRIB_TBL - Tributes on Designation Funds

## Record Groups in Tableset Sharing

A record group is a set of functionally or logically related records or views based on how the records are used in the system. A record group can contain a single record or view, or it can contain many records and views. Record groups are delivered as part of the PeopleSoft system and should not be altered.

When you create a business unit, that business unit is automatically linked to each record group in the system that you are using.

Record groups exist for two purposes:

- To save time in data entry.

With record groups, tableset sharing can be accomplished quickly and easily instead of requiring redundant data entry.

- To provide consistency in the data.

Record groups ensure that tableset sharing is applied consistently across all related tables and views in the system.

## Business Units, Tablesets, and Record Groups

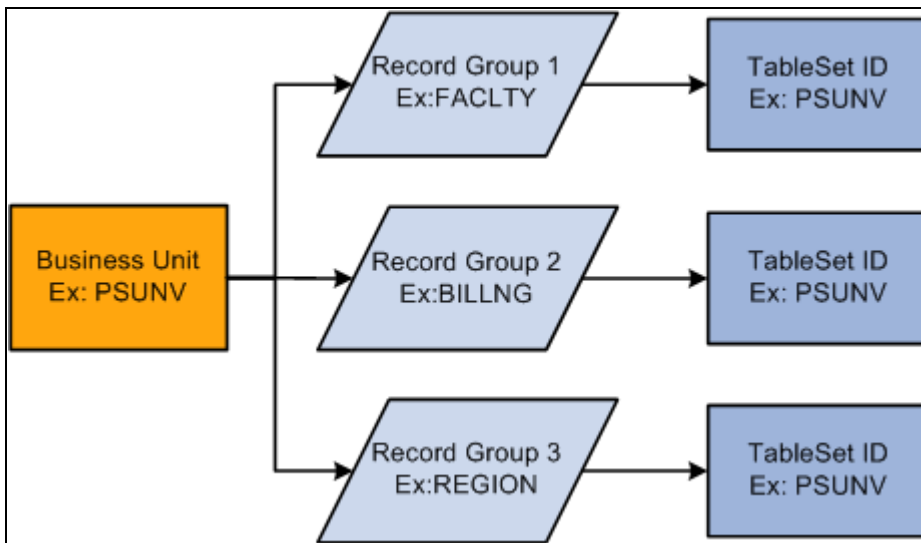
When you create and then save a business unit, a new tableset ID with the same name as the business unit is created. The system automatically assigns that tableset ID to each record group for the new business unit.

---

**Note.** PeopleSoft suggests that you create tableset IDs and business unit names that are five characters long. A performance degradation occurs if the tableset IDs or business units have fewer than five characters.

---

This diagram illustrates the relationship between business unit, record group, and tableset ID:



Relationship between business unit, record group, and tableset ID

Tableset IDs are the labels that the system uses to identify tablesets. You can have as many tableset IDs as you like, but the more you have, the more complex tableset sharing becomes. You always have the same number of tableset IDs as tablesets.

---

**Warning!** You must define at least one complete set of these tables—a tableset—for the Campus Solutions system to function.

---

**Note.** You must create at least one tableset ID, even if you are not taking advantage of tableset sharing. Some institutions need only one tableset ID and one business unit.

---

When you set up the control tables in the system, you'll notice that the tableset ID, or additional primary key, enables the sharing of control table information across business units. If you prefer, you can create a unique set of tables for each new business unit. Either way, tablesets form the building blocks of the system. You populate the individual tables in the tableset according to your particular business rules.

You can also rearrange tablesets by updating tableset assignments for a business unit in the Utilities - TableSet Controls component. A tableset is a group of control table rows identified by the same tableset ID.

You are not required to share all tables in a tableset. With Campus Solutions, you can share any combination of tables with any number of business units, according to your needs. Use the pages in the component to identify, for each business unit, which data is shared and how it is shared.

Tableset sharing can be extremely easy for an organization to design. In fact, it is almost entirely set up by the time you have finished creating the business units.

When defining tableset IDs for Contributor Relations, you must manually create a setID in the tableset ID record, if one does not already exist that matches the Contributor Relations business unit.

## Set Control Values

Tablesets are identified by a set control value. The set control value is also a tableset ID. The set control value used to identify a tableset is not the same as the tableset ID that PeopleTools uses to retrieve the data from the tables in the database. Sometimes the set control value is the same as the tableset ID, but other times it is not.

Here is an example of how this works. Suppose that a community college district has three campuses and a main office:

<b>Community College Office and Campuses</b>	<b>Tableset ID</b>
Community College Main District Office	CCMDO
North Campus	NORTH
West Campus	WESTC
Far South Campus	SOUTH

Two of the campuses share location and facility information, and all three share the grading scheme and level or load rules. Here are the shared record groups:

<b>Record Group</b>	<b>Campuses Sharing Record Groups</b>
FACILITY (Facility table)	North Campus and West Campus
HR_03 (Location table)	North Campus and West Campus
CAREER (Grading Scheme and Level/Load tables)	North Campus, West Campus, and Far South Campus

This table shows how set control values and tableset IDs are used to identify which rows appear in prompt boxes:

<b>Set Control Value</b>	<b>Record Group</b>	<b>Tableset ID</b>
NORTH	FACILITY	NORTH
	HR_03	NORTH
	CAREER	CCMDO
WESTC	FACILITY	NORTH
	HR_03	NORTH
	CAREER	CCMDO

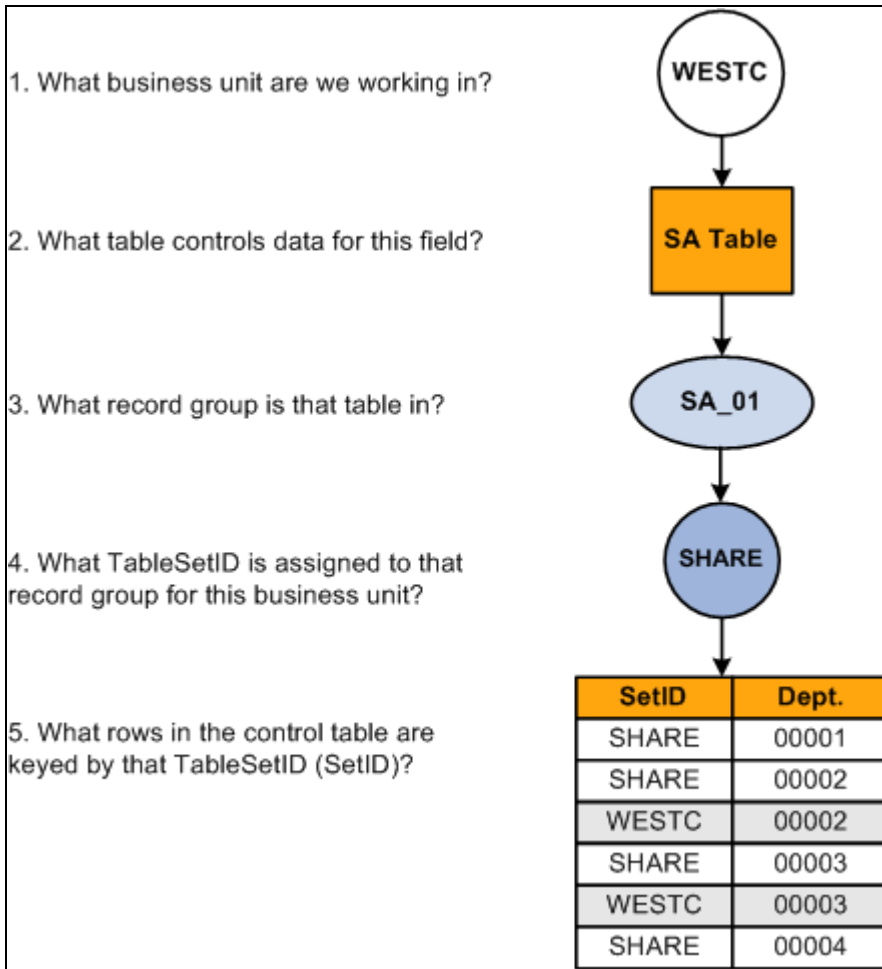
<i>Set Control Value</i>	<i>Record Group</i>	<i>Tableset ID</i>
SOUTH	FACILITY	SOUTH
	HR_03	SOUTH
	CAREER	CCMDO

## Data Sharing

With tableset sharing, you can specify the control table data that the system uses for each business unit. If much of the control table data is the same from business unit to business unit, tableset sharing enables you to share that information, instead of having to enter the same data multiple times.

To understand how this works in the PeopleSoft system, consider what happens when a user makes a selection from the available options. The list that appears contains all of the valid entries that can be entered in the field based on the relevant business unit.

This series of questions outlines the online process that occurs:



Tableset sharing process

---

**Note.** Record groups and setIDs for a set control value have a one-to-one relationship.

---

## Selecting a Business Unit Structure

Business units offer a flexible structuring device that you can use to implement each PeopleSoft application based on how the institution is organized. In some institutions, the correspondence between existing structures and the organizational model is obvious. In other cases, it can require careful analysis to determine how to set up the business units so that they reflect the institution and enable you to use the system effectively.

In deciding on the business unit structure for a PeopleSoft application, look closely at the structure in the current system as a starting point. What sort of organizing concepts or categories do you use? Do you still want to use these structures in the PeopleSoft system? To decide where to draw the lines between business units in the institution, you may have to weigh a number of different variables. First, you might consider the question from one perspective, saying, "If I use these criteria, my institution divides into these logical units." Then you might use different criteria and see if the institution divides into different logical units. As you determine at the optimal business unit structure for the institution, keep in mind that in some circumstances you *must* set up multiple business units and in some cases setting up multiple business units is optional.



---

**Note.** Multiple business units are not required for Contributor Relations.

---

Examine the existing codes and IDs and determine how they might relate to PeopleSoft business units. Consider whether you can make a simple mapping of the existing structures onto business units, or whether you should modify the structures based on the flexibility afforded by the PeopleSoft system.

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**Note.** Work closely with your PeopleSoft implementation partner early in the design to determine how best to define business units for the Campus Solutions system.

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## Implementing Tableset Sharing

This section provides an overview of tableset sharing implementation and discusses how to:

- Create tableset IDs.
- Review record groups.
- Create business units.
- Assign cross-references for business units.
- Adjust tableset sharing for record groups.
- Adjust tableset sharing by using trees.

## Understanding Tableset Sharing Implementation

After you have determined how many business units you need and how you want to organize them, you can create them for the Campus Solutions system, and then implement tableset sharing.

You define tableset IDs for the purpose of administering certain control tables, such as the Department table, in a decentralized way. When you define a tableset ID, consider how to categorize a subset of the control table data. If you want to use multiple tableset IDs to set up tableset sharing for the first business unit that you create—before you have created any additional business units—create tableset IDs on the TableSetID page before defining the business unit.

You can create tableset IDs as you set up the business units. If the default setID that you enter creates a new business unit that does not exist, the system automatically creates it; however, you can also create tableset IDs independent of business unit creation by using the TableSetID page.

To define tableset sharing for the organization, you complete the steps for each of these tasks.

To establish tableset sharing, you:

1. Set up business units.
2. Define record groups.

You can add new record groups.

3. Define tableset IDs for the organization, to reflect the organization's structure.

This step is sometimes optional. It is required, however, for Contributor Relations if a setID matching the Contributor Relations business unit does not exist.

4. Update all of the tableset record group controls.

To link tableset sharing and system defaults to permission lists or business units, you:

1. Set up Primary Permission List Preference Defaulting options.
2. (Optional) Set up all Business Unit HR Defaulting (business unit human resources defaulting) options.

## Pages Used to Implement Tableset Sharing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TableSetID - TableSet Control	SETID_TABLE	PeopleTools, Utilities, Administration, TableSetIDs, TableSet Control	Create tableset IDs.
Record Group	REC_GROUP_TABLE	PeopleTools, Utilities, Administration, Record Group, Record Group	View record groups to see which tables and views are included in each record group in the system. Record groups are predefined for the system.
Business Unit	BUS_UNIT_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit	Create business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference	Assign cross-references for business units, to identify business units in other PeopleSoft applications that relate to business units.
TableSet Control - Record Group	SET_CNTRL_TABLE1	PeopleTools, Utilities, Administration, TableSet Control, Record Group	Adjust tableset sharing for record groups. Tableset sharing is set up as soon as you create business units; however, you adjust tableset sharing by changing the tableset IDs that are assigned to individual record groups.
TableSet Control - Tree	SET_CNTRL_TABLE2	PeopleTools, Utilities, Administration, TableSet Control, Tree	Adjust tableset sharing by using trees.

## Creating Tableset IDs

Access the TableSet ID - TableSet Control page (PeopleTools, Utilities, Administration, TableSetIDs, TableSet Control).

The screenshot shows a web form titled "TableSet Control". It contains the following fields:

- SetID:** PSUNV
- Description:** Peoplesoft University
- Short Description:** PSU
- Comments:** Do not delete.

TableSet Control page

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**Note.** SetIDs should be five characters in length for optimal system performance.

---

### SetID

Displays the setID.

For clarity, you might create one setID (also known as a tableset ID) that does not match any of the business units, and use that setID to key information that is generic throughout the system. Consequently, the rest of the setIDs match the business units with which they are used.

You can create tableset IDs independently or as part of the business unit creation process by using the TableSet ID page. When you add a new business unit to the system, the system automatically specifies a default tableset ID on the Business Unit page that matches the name of the new business unit. If this default tableset ID (with a name matching that of the new business unit) does not already exist, the system automatically creates a new tableset ID with a name that corresponds to the new business unit.

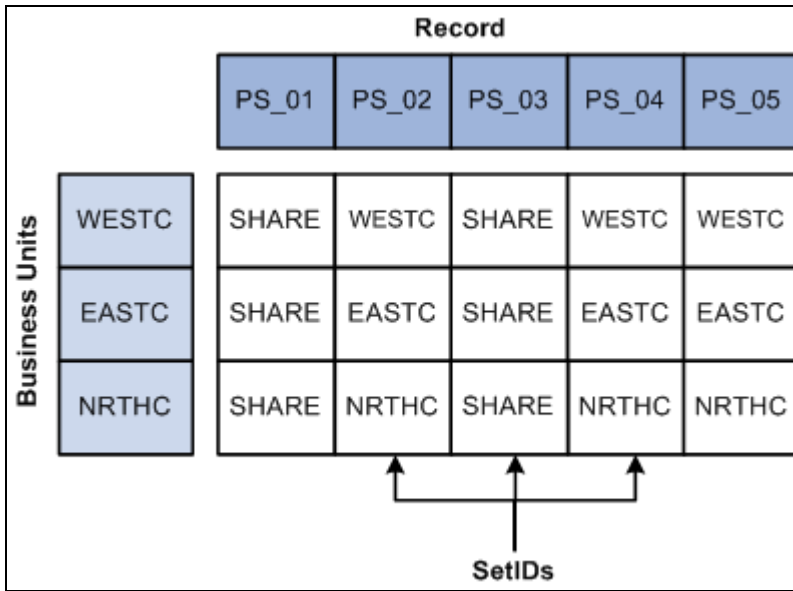
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**Note.** The system creates a tableset ID with the same name as the business unit when you add a new business unit to the system, regardless of whether you choose to use the business unit name as the default setID. Contributor Relations business unit setup does not automatically create a related setID. If you are creating a Contributor Relations business unit that does not already have a matching setID in the tableset ID record, you must create one manually.

---

To use multiple tableset IDs to set up tableset sharing for the first business unit that you create (before you create any additional business units), create tableset IDs on the TableSet ID page before defining the business unit.

This example illustrates tableset sharing:



Tableset sharing matrix

**See Also**

[Chapter 2, "Introducing Business Units and Data Sharing," Understanding Data Sharing Among Business Units, page 14](#)

*PeopleTools PeopleBook: PeopleSoft Application Designer Developer's Guide, "Planning Records, Control Tables and TableSets"*

**Reviewing Record Groups**

Access the Record Group page (PeopleTools, Utilities, Administration, Record Group, Record Group).

**Record Group**

**Record Group ID:** ADJUST

**Description:** SF - Adjustment - INSTITUTION

**Short Description:** Adj  **Force Use of Default SetID**

Records in Group Customize | Find | View All | First 1-2 of 2 Last

*Record (Table) Name	Record Description		
DROP_REASON_VW	Drop Reason View		
DROP_REASON_VW2	Drop Reason View		

Record Group page

In the record group table, group the record definitions for the tables that you want to share, as well as any dependent record definitions. If you're adding a table to a PeopleSoft application, an appropriate record group may already be defined. But if you are adding new functionality, you may need to add a new record group for the tables that you define.

---

**Warning!** Record group definitions and the assignment of the individual tables and views to specific groups are provided to ensure complete and accurate tableset sharing within each functional area. You should not change these record group assignments.

---

<b>Record Group ID</b>	Displays the record group ID.  The name that you give the record group ID should be descriptive enough to encompass a category of related tables, not just the table that you are specifically sharing.
<b>Force Use of Default SetID</b>	Select to force the use of the default setID. Set up the default setID on the TableSet Control - Record Group page.

### **Records in Group**

<b>Record (Table) Name</b>	Displays the record name of all of the records that are part of the record group ID. Records (tables) are identified by a <code>_TBL</code> extension, and views are identified by a <code>_VW</code> extension.  A record group can contain a single table or many tables and views.
<b>Record Description</b>	Displays the description of the associated record (table) name.

---

**Note.** When you add a new record group ID, the system automatically adds the new record group ID to all current set control values (business units). The default setID for the new record group ID is based on the default setID for each set control value, as defined for that set control value on the TableSet Control - Record Group page.

---

## **Creating Business Units**

Access the Business Unit page (Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit).

Business Unit		Business Unit Reference	
<b>Business Unit:</b>	PSUNV		
<b>*Status:</b>	Active <input type="button" value="v"/>		
<b>*Description:</b>	<input type="text" value="PeopleSoft University"/>		
<b>Short Description:</b>	<input type="text" value="PSUNV"/>		
<b>Default Record Group SetIDs</b>			
<b>SetID:</b>	<input type="text" value="PSUNV"/>	Peoplesoft University	
<b>OR</b>			
<b>Clone from Existing Business Unit</b>	<input type="text"/>		

Business Unit page

---

**Warning!** For optimal system performance, business units must be five characters. Significant performance degradation occurs if the business units have fewer than five characters.

---

When you define a business unit, you can specify that the system establish default tableset IDs for the business unit by using the Default Record Group SetIDs group box. This indicates to the system which tableset ID is associated with the business unit. The tableset ID determines the preliminary tableset sharing for the business unit by associating the business unit with a record group.

**Status** Select a status. Business units are not effective-dated, so use this field to implement or retire business units.

**Default Record Group SetIDs**

**SetID** Enter an existing tableset ID to be used with the business unit. When you're adding a new business unit to the system, the system automatically populates this field with the same name as the new business unit.

For example, if the business unit is called MAINC, then the setID appears by default as *MAINC*. You can override the setID as necessary.

**Clone from Existing Business Unit** Enter a business unit code. With this feature, you can clone the tableset sharing setup of an existing business unit. When the record groups are linked to the new business unit, the system assigns each record group the same setID that is used for the record group by the business unit that you selected as the clone unit.

For example, you can use this field to have the tableset sharing for the new business unit mirror that of another business unit, or to make the two business units similar except for a few record groups.

---

**Note.** When you first access the Business Unit page, the Clone from Existing Business Unit option is cleared. To activate the option, clear any setID values from the SetID field, and exit the field.

---

---

**Note.** When you save a new business unit for the first time, the system makes the default setID or clone unit unavailable for entry. You cannot change the default record group setID information for this business unit again. This rule prevents you from accidentally overwriting the tableset record group controls for the defined business units.

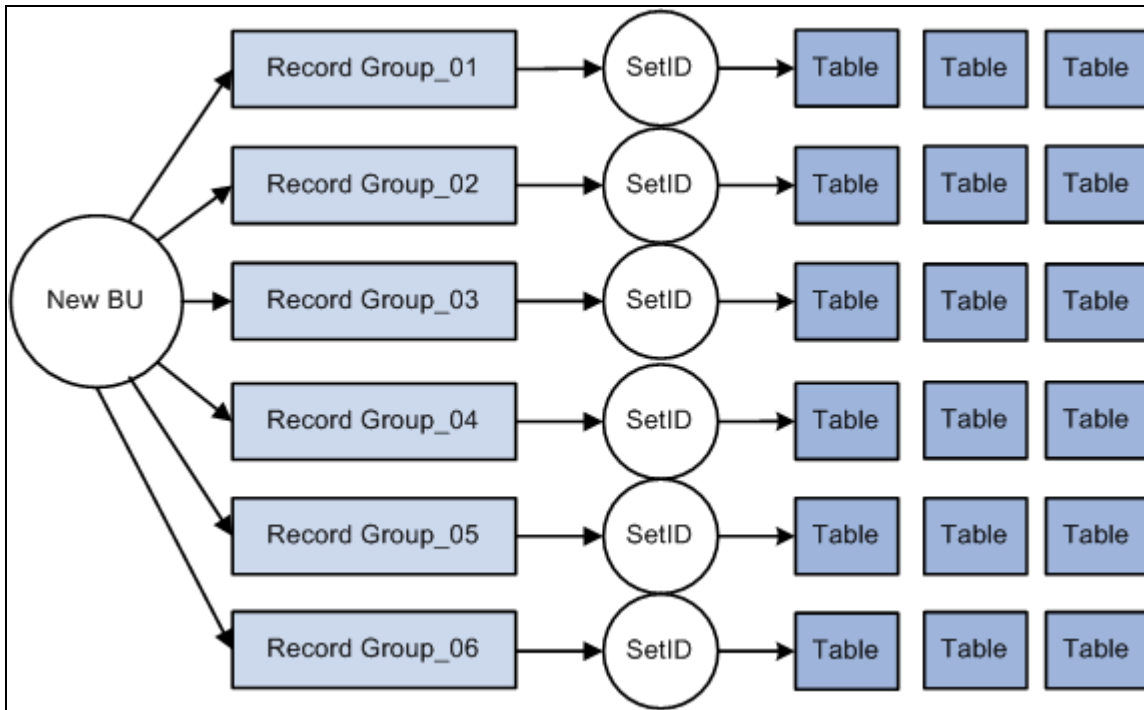
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When you add a new business unit and save the page, the system creates all of the appropriate table values provided by PeopleTools that connect the business unit ID, record group ID, and setID.

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Setting Up Business Units.

### ***Example of Business Unit and Tableset ID Association***

This diagram illustrates how the business unit, record groups, and tableset ID are associated. The business unit and tableset ID can have the same value:



Tableset sharing

## Assigning Cross-References for Business Units

Access the Business Unit Reference page (Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference).

Business Unit		Business Unit Reference	
<b>Business Unit:</b>	PSUNV	PeopleSoft University	
<b>Business Unit Cross Reference</b>			
<b>Asset Management Business Unit:</b>	<input type="text"/>	<b>AR Business Unit:</b>	<input type="text"/>
<b>Order Management Business Unit:</b>	<input type="text"/>	<b>AP Business Unit:</b>	<input type="text"/>
<b>Balancing Business Unit:</b>	<input type="text"/>	<b>PO Business Unit:</b>	<input type="text"/>
<b>Budgeting Business Unit:</b>	<input type="text"/>	<b>PC Business Unit:</b>	<input type="text"/> 🔍
<b>Billing Business Unit:</b>	<input type="text"/>	<b>General Ledger Unit:</b>	AUS01 🔍
<b>Inventory Business Unit:</b>	<input type="text"/>		

Business Unit Reference page

Indicate the business unit cross-reference, if applicable, for any of the PeopleSoft applications listed on the page. You can identify business units in other PeopleSoft applications that relate to the business unit.



## Adjusting Tableset Sharing for Record Groups

Access the TableSet Control - Record Group page (PeopleTools, Utilities, Administration, TableSet Control, Record Group).

Record Group
Tree

**Set Control Value:** 001

**SetID**

**\*Default SetID:**

**Record Group Control** Customize | Find | View All | First 1-10 of 81 Last

Record Group ID	Description	*SetID	Short Description		
ADJUST	SF - Adjustment - INSTITUTION	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
AGING	SF Aging Tables - BUSINESS_UNIT	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
APPFEEES	SR Applic Fees - INSTITUTION	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
AV01_MBR	CR Member Grp - BUSINESS_UNIT	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
AV02_GIFT	CRGift Group - BUSINESS_UNIT	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
AV03_ITEM	CR Item Types - BUSINESS_UNIT	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
AV04_INTV	CR Initiatives - BUSINESS_UNIT	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
AV05_DEPT	CR Dept-BUSINESS_UNIT	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
BILLING	SF Billing - BUSINESS_UNIT	NERCT <input type="text"/>	eRecruit	<input type="button" value="+"/>	<input type="button" value="-"/>
BUDGET	CS Budget Regions - INSTITUTION	PSNLD	PSNLD	<input type="button" value="+"/>	<input type="button" value="-"/>

TableSet Control - Record Group page

### Default SetID

Enter the default setID to use for the set control value. The default setID is the tableset ID that the system uses when you add additional record definition groups to be shared within this tableset. If you have the system require a default setID (by using the Record Group page), then you cannot change the setID for the record group with a setID that is different from the default setID that you indicate here. The setID for that record group ID becomes unavailable for entry.

Remember, most record groups contain a number of tables and views. The tableset ID that you assign to that record group *must* represent the information that you want to use from each of the control tables contained in that record group.

### SetID

For each record group ID, enter the setID to use.

## Adjusting Tableset Sharing by Using Trees

Access the TableSet Control - Tree page (PeopleTools, Utilities, Administration, TableSet Control, Tree).

The screenshot shows the 'TableSet Control - Tree' page. At the top, there are two tabs: 'Record Group' and 'Tree'. Below the tabs, the 'Set Control Value' is set to '001'. Under the 'SetID' section, the '\*Default SetID' is 'PSNLD'. The 'Tree Controls' section features a table with the following data:

*Tree Name	Description	*SetID	Short Description
ACAD_ORGANIZATION		BEL	Belgium

Navigation options include 'Customize', 'Find', 'View All', 'First', '1 of 1', and 'Last'.

TableSet Control - Tree page

- Default SetID**                      Displays the default setID assigned to the field value. If you created another tableset for sharing trees, you can change this value.
- Tree Name**                        Enter the tree definitions that are defined with the same set control field.
- SetID**                                Enter the appropriate setID.

## Chapter 3

# Preparing for Data Conversion

This chapter provides an overview of data conversion and discusses how to:

- Perform data conversion.
- Convert Recruiting and Admissions and Campus Community data.
- Convert Financial Aid data.
- Convert Student Records data.
- Convert Student Financials data.
- Convert Contributor Relations data.

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## Understanding Data Conversion

Conversion of data from an existing system is one of the most challenging and critical tasks that you accomplish while installing the Campus Solutions system. The conversion task takes preparation and planning, a programming effort, and robust testing.

Because of many factors—amount of data to convert, business practices, institutional schedule—much of the decisions as to when, how much, and even the method of converting historical data is ultimately up to you. The more you convert the better the new system becomes, but the more challenging the conversion task is. This section contains some best practice recommendations for converting data into Campus Solutions; however, the information presented here is not exhaustive.

Consider these tasks:

- Explore Campus Solutions thoroughly before you convert any data.

Mapping the data to existing fields in PeopleSoft is a step that requires you to know the system in depth. Take advantage of documentation and training available.

- Completely scope the project before starting an implementation and conversion.

An institution should develop a well-defined scope or implementation plan—including information such as the full extent of the conversion, how much data to convert, and the timing of each phase of data conversion—before starting the project. This plan should have the approval or buy-in of the institution's management team, the project team, and the partners or PeopleSoft consultants with whom you are working.

- Test, test, test.

It is critical that you test the processes thoroughly in an environment where you can catch errors before you convert the data.

- Plan a conversion schedule.

Because Campus Solutions is a fully integrated system with multiple applications, it is important to plan which applications are converted in a specific order. You may convert the data any way you want, but this chapter suggests how to maximize the system, and hopefully, minimize any challenges you may encounter during conversion.

There are as many ways to plan a conversion as there are universities. So it is a unique process based upon the legacy system, your needs, and how you do business. It is suggested that you:

- Enter go-live dates (or a go-live term) for fall term, not mid-year.

If you do choose a spring term as the go-live term, you may run into some serious problems. For example, in the case of PeopleSoft Financial Aid, the financial aid cycle starts months before the fall term. The Financial Aid office awards financial aid starting in the March and April time frame for the fall semester. So, timing the implementation drastically impacts the amount of data that needs to be converted as well as the complexity of the conversion process. Work closely with partners, consultants, and account managers to determine the best go-live dates for the institution.

- Convert names, addresses, and personal information first and as early as possible.

From there you can choose the order of the conversion of each application. It is suggested that you convert PeopleSoft Recruiting and Admissions and Financial Aid, then PeopleSoft Student Records and PeopleSoft Student Financials. If you are using PeopleSoft Human Resources applications in addition to Campus Solutions applications, it is critical that you coordinate the name, address, and personal information conversion process with the Human Resources conversion team, thereby reducing the amount of cleanup required and the duplicity and conflict of data when the data is converted.

- Enter an effective date that is adequate for your own history.

This issue can particularly arise in Student Records.

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## Performing Data Conversion

This section provides overviews of the conversion process and referential integrity and discusses how to:

- Map data for conversion.
- Prepare data for conversion.
- Verify converted data.
- Use data dictionaries.
- Use data load programs.
- Keep systems in sync.
- Estimate disk usage space.

## See Also

*PeopleTools PeopleBook: Data Management*

## Understanding the Conversion Process

Here is a review of the scope of the conversion process, so that you can gain an understanding of the phases involved:

- Decide how much data to convert.

You may choose to convert a different amount of data for each application. For example, you may want to convert 10 years' worth of student records data, two years of admissions data or two years of financial aid data.

- Map data to PeopleSoft data fields.

To effectively plan a conversion, dig into the old system and identify that one obscure field on that one obscure table and figure out how it maps into the new PeopleSoft system. In some cases, it is difficult, and at times impossible, to map all the codes and tables from the legacy system directly to PeopleSoft tables. In addition, think about the impact that these legacy fields or codes have on reports generated by the PeopleSoft system.

- Export the data, using a Structured Query Report (SQR) or another method to interim tables.

Use the interim tables to review and clean up the data before moving it to the PeopleSoft system. Corruption of data often is the result of data entry errors. You do not want to move corrupt data from the old system to the new PeopleSoft system.

- Import the data using an SQR.

## Understanding Referential Integrity

An important topic to consider and test for as part of the conversion effort is referential integrity. You can convert a lot of data into the correct tables, but the overall system may not have the necessary connections. If you use the normal posting processes in the various applications to convert most of the legacy data, you should not have referential integrity problems because those processes contain many of the necessary referential integrity rules.

An example in Student Financials is third-party contract information. If you link a third party or a transaction to a contract, the contract needs to exist. However, if the conversion neglects to convert contracts, then a referential integrity problem can occur.

## Mapping Data for Conversion

When you map data, you are identifying legacy system data and redefining it in PeopleSoft record definitions. This step can be performed while setting the conversion timeline; however, your data mapping efforts will be more focused if the conversion time line has been set.

Issues to consider when mapping data include defining the amount of historical data to be converted, code validation, workflow, reporting, and other processes. The amount of historical data converted may vary across PeopleSoft applications. The complexity of how the legacy system stores history may contribute to less history mapped into the PeopleSoft system. With code validation, valid codes for the institution may have changed over time, and this too must be considered in the conversion effort.

To map data for conversion:

1. Define each legacy data element.
2. Determine if the legacy data element is pertinent to the implementation scope.
3. Map the legacy data element to the Campus Solutions data element.
4. If the legacy data element cannot be mapped directly within your Campus Solutions product line, determine if the legacy data should be tracked any more or if it could be tracked in another PeopleSoft product line, such as PeopleSoft Human Resources Management.
5. Reformat the legacy data to fit, for example, the Campus Solutions field size, format or data type.

If certain legacy data cannot be reformatted, indicate those as gaps in the gap analysis.

Spreadsheets are helpful tools when mapping data. At a minimum, these spreadsheets should include the legacy system data source (if data comes from more than one source), the legacy system data element and data type, the specific Campus Solutions or Contributor Relations record, and the specific field and data type in that record. Optional description fields might include related prompt tables, conversion translation values, and legacy system data position.

Another option is to build a mini-application using PeopleTools to map data. You can build Structured Query Language (SQL) views to link various PeopleTools tables together, such as PSRECFIELD and PSRECDEFN, which creates a robust method of identifying field attributes. You can create special reports to identify key fields, required fields, or legacy system data not yet mapped.

## Preparing Data for Conversion

After you have identified the legacy data to be converted, you must prepare it for conversion. For example, when coming from the legacy system, data may be packed in EBCDIC format. These fields should be reformatted into a conversion-ready unpacked flat file in ASCII standard format. Usually, a COBOL program is written and run on the database server to create a file placed on the legacy system.

Conversion-ready data does not have to reside in a single file. The program may be designed to create multiple files during the formatting process, with each file only containing data pertinent to a single or related set of Campus Solutions or Contributor Relations destination tables. Smaller file sizes are more manageable and result in faster conversion processing. Also, the data preparation program itself may be broken into multiple programs based on the destination table.

One of the largest time-consuming tasks of the conversion project can be data cleanup. One way to minimize this task is to clean up the data before importing it into the PeopleSoft system. This can be done by using the data preparation and extract program. This program contains more logic to ensure data validity and therefore takes a longer time to program and test, but the program reduces processing time during the data cleanup.

Another option to reduce the data cleanup effort for the conversion team is to create reports for review by appropriate functional experts, technical experts, employees, and managers. These reports can be used for data verification and correction before the data is entered in the database. Correct invalid legacy data before preparing for conversion.

Not all data conversion must occur through background programs. You may determine that online application data entry is necessary for prompt tables and other required PeopleSoft tables for which there was no legacy data.

## Verifying Converted Data

After data has been converted to the PeopleSoft system, you must verify the data and check its integrity. Two methods are online verification and batch verification. Data verification must be performed to clean up invalid data that may not have been keyed, required, or validated in the preparation or conversion processes. This process can also identify and clean up duplicates in the legacy system before you finish converting and mapping the data to the new PeopleSoft tables.

You can write batch programs or SQL scripts to check for parent-child relationships and other validation checking. Writing the batch programs requires more time commitment but can quickly check more records.

Online data verification is less exact than the background process, because records are randomly accessed and require a longer amount of time. However, online data entry can be used to enter nonrequired data or supplemental data that was not available from the legacy system.

## Using Data Dictionaries

PeopleSoft does not issue a data dictionary as part of its documentation. PeopleTools provides the ability for online documentation of page and field relationships. The development team documents its material as much as is feasible online in PeopleTools. You can write an SQR that provides all the data dictionary information that you need.

## Using Data Load Programs

After data preparation, design conversion programs that extract the appropriate file layout, to transfer the legacy data to Campus Solutions tables.

### ***Input Format***

Often the input format for the conversion program is the flat file created by the data extract program on the legacy system and transferred—by using File Transfer Protocol—to the database server. Consider loading the data into temporary tables within the PeopleSoft system instead of directly into the "live" tables. By performing this task, you can use the tools already available to you to both clean up and properly convert data. The temporary tables would then be the input for the conversion program.

### ***Conversion Program and Program Language***

The conversion program transfers the legacy data from the input format to Campus Solutions tables, including reformatting, validating, and prompt table translating not encompassed in the data preparation programs. The conversion program must include defaults for Campus Solutions record keys and required fields whenever legacy data has no data map.

The two most commonly used languages for conversions are COBOL and SQR. Another option is a specific database management system (DBMS) import utility, if one exists—such as the Oracle SQL Loader. Determinants for making this decision include your skill set. For example, if you already know COBOL, there is no associated learning curve downtime, or increased resources if you use COBOL. Regardless of your skill set, consider if it would be advantageous to learn a language that is likely be used in the future for Campus Solutions modifications, conversion file size, level of translations and edits, and DBMS capability.

<b>COBOL</b>	Has a more robust debugger, can process a larger number of records faster, and is more widely recognized in the industry.
<b>SQR</b>	Is more commonly used in reporting and minor modifications. In most cases, SQR code can be written in less time than COBOL code.
<b>DBMS Import Utility</b>	Requires the least conversion effort but is limited to no application-specific edits or translations.

### ***Table Loading Sequence***

Conversion programming may include a single program that incorporates all pertinent tables and their sequence or multiple programs that incorporate single tables or a few related tables. Multiple programs can run simultaneously—increasing efficiency and enabling the allocation of programming responsibility.

### ***Errors and Exception Handling***

Regardless of the number of conversion programs, there must be adequate and standard error and exception handling. Reports of database action failures, validation logic failures, and pertinent details help ensure a quality and thorough conversion.

### ***Totals Controls***

In addition to errors and exceptions, totals controls also help in quality control. Totals controls include the number of records processed on both the source and destination sides, and dollar tallies whenever possible are pertinent for Financial Aid and Student Financials applications.

### ***Required Fields***

You can find out what fields are required for any table or page by searching PeopleSoft Application Designer in PeopleTools. You can also write an SQR to list all required data elements from tables that you want to use in the conversion. It is important that you also read and understand the PeopleCode. There are PeopleCode restrictions within records that can mean that in certain circumstances a field is required or a default value is required. Without understanding the PeopleCode, incorrect data could be entered.

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***Warning!*** If a field is not required, do not assume that you do not need to convert data into that field. It is recommended that when in doubt, you review the PeopleCode to determine whether you need data or default values for a particular field.

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**Note.** Refer to individual discussions regarding each application in this chapter for specific data conversion and data loading tips for applications within Campus Solutions.

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## Keeping Systems in Sync

Depending on the implementation plan, there are three scenarios for moving data processing from a legacy system to a PeopleSoft system. The first scenario is to cut over everything at once. When all students are fully implemented, you perform a cutover to the PeopleSoft system. Until that point, the legacy system is fully operational. No system synchronization is required.

The second scenario is the mutually exclusive implementation approach. For example, when a student is converted to an application in Campus Solutions, such as Financial Aid, the student is officially taken off of the legacy system's processing in that application. All of the student's other application processing—such as Student Records—is performed on the legacy system. There are two production systems. This approach increases the complexity of joining two data sources for interfaces and reports.

The third scenario is the parallel system approach. An alternative to having two production systems is to test each Campus Solutions application as necessary, but completely delete the application database and rerun a full conversion with the most up-to-date data from the legacy system until full cutover is achieved after full testing. This approach implies that the legacy system is in full use until cutover, but no new programs must be written—for example, the conversion program is reused and all reports continue to be produced from the legacy system. A variance of this approach is to write new data refresh programs that periodically update the various applications with student information entered in the legacy system. This variance provides for more up-to-date information for more accurate reporting and testing, but also implies the additional effort to program the refresh routine. Care must be taken in the refresh routine design to ensure that data in the PeopleSoft system is not duplicated or overlaid by the legacy data.

## Estimating Disk Usage Space

For Campus Solutions, PeopleSoft has done some preliminary research on the sizing of a production system. PeopleSoft realizes that the theoretical amount of disk space required by an application is different than the actual amount of disk space required by a database. The difference is due to comparing bytes with database blocks. For instance, if a particular table's average row length is 25 bytes and there are 1,000 rows in the table, theoretically the required amount of space is 25,000. However, if the database block size is 4K (4096), the number of database blocks required to hold the data is seven blocks or 28,673. Therefore, the actual amount of disk space required is greater than the theoretical. With this in mind and realizing that each installation may require a different block size, PeopleSoft states the size in theoretical terms.

For 1,000 student prospects, the amount of space needed for tables and indexes would be 40 megabytes (MB).

For enrollment, PeopleSoft needs to work with a specific, albeit theoretical, scenario. PeopleSoft's scenario was to enroll 1,000 undergraduate students over three terms into four classes per term. In the first term, there are no prerequisites to enroll in any of classes; the second term has one prerequisite for each of the classes; the third term has two prerequisites for each of the classes. During enrollment, the students have no time conflicts and there is no lack of facilities (rooms or seats). The amount of disk space excludes description information stored in long text fields. For 1,000 student enrollments, the amount of space needed for tables and indexes would be 20 MB.

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## Converting Recruiting and Admissions and Campus Community Data

This section provides an overview of conversion of recruiting and admissions and campus community data and discusses how to populate tables for recruiting and admissions and campus community data.

### Understanding Conversion of Recruiting and Admissions and Campus Community Data

You should convert recruiting and admissions data first along with relevant Campus Community data such as personal data—names, addresses, or phone numbers.

It is up to you how much of this data you convert—for instance, how many addresses you convert for one individual—and how much history you take into consideration. Of course, if the student records team is converting 10 years of student records, make sure that there are 10 years of personal data elements in the system.

You should convert up to two years of recruiting and admissions data for your institution. Again, this may vary depending upon your practices and your needs. Regardless of how much history you do convert, it is important that you keep the prospect stacks of data and the Recruiting and Admissions stacks of data consistent. You do not want to end up with a year of recruiting and admissions data without the prospect data for the same year. This also ensures that the data required for institutional research reporting—for instance, cohort reporting and statistical reporting—remains consistent.

### Populating Tables for Recruiting and Admissions and Campus Community Data

Aside from address and other information, there are some tables that are precursors to all application conversions in Campus Solutions. These tables represent the minimum to be converted.

#### ***Academic Organization Tables***

Populate these tables in this order for academic organizations:

- INSTITUTION\_TBL
- CAMPUS\_TBL
- ACAD\_CAR\_TBL
- ACAD\_ORG\_TBL
- SUBJECT\_TBL
- ACAD\_PROG\_TBL
- ACAD\_PLAN\_TBL

- ACAD\_SUBPLAN\_TBL

### ***Level and Load and Term and Session Tables***

Populate these tables in this order for level and load and term and sessions:

- LEVEL\_LD\_RULE\_TBL
- ACAD\_LEVEL\_TBL
- ACAD\_LOAD\_TBL
- TERM\_TBL
- TERM\_VAL\_TBL
- SESSION\_TBL
- ACAD\_CAL\_TBL
- ACAD\_CALTRM\_TBL
- ACAD\_CALSES\_TBL

In addition to these tables, you must convert these tables as early in the process as possible in the sequence. Use the name and address load routines delivered with the system, to load data:

- PERSON.
- PERS\_DATA\_EFFDT.
- PER\_POI\_TYPE.
- PERSONAL\_DATA.
- DISABILITY: required for PERS\_DATA\_EFFDT and PERSONAL\_DATA to function properly.
- DIVERSITY: required for PERS\_DATA\_EFFDT and PERSONAL\_DATA to function properly.
- NAMES.
- ADDRESSES: to display and convert any address information, including those on PERSONAL\_DATA.
- ADM\_PRSPCT\_CAR.
- STDNT\_CAREER.
- ADM\_APPL\_DATA.
- ADM\_APPL\_PROG.
- GENL\_MATERIALS: to track materials already received for applications.
- EXT\_ORG\_TBL.

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## Converting Financial Aid Data

This section provides an overview of conversion of financial aid data and discusses how to populate tables for financial aid.

### Understanding Conversion of Financial Aid Data

This section lists prerequisites and discusses conversion of financial aid data.

#### *Prerequisites*

Before you can convert financial aid data, personal data for each financial aid record must already be converted. In addition, financial aid data should be converted prior to student financials data, because posting of financial aid in Student Financials is dependent upon the disbursements in Financial Aid.

You must define item types before you begin conversion of financial aid data. You must decide whether financial aid or student financials has ownership of the PeopleSoft Item Types table.

#### *Conversion of Financial Aid Data*

You should convert up to two years of financial aid data for schools, and as much aggregate data as possible, because it has lifetime loan limit information. Ultimately, it is up to you how much data you convert. You may decide to keep the legacy system up until fall of the conversion year to close out Pell Payment and FISAP reporting.

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**Note.** Please refer to the Department of Education's requirements for maintaining financial aid records to assist you in deciding how much legacy data to convert to the PeopleSoft system.

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#### *See Also*

[Chapter 3, "Preparing for Data Conversion," Converting Student Financials Data, page 50](#)

## Populating Tables for Financial Aid

At a minimum for Financial Aid, convert the aggregate data for these tables:

- STDNT\_AGGR\_LIFE
- STDNT\_AGGR\_ALL
- STDNT\_AGGR\_SCHL

You may want to convert additional data depending on what you have in the current system:

- Automatic packaging.
- ISIR data.

- Student budget information.
- Years of award activity.
- Loan history.
- Work-study history.
- Checklists for documents already received.

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## Converting Student Records Data

You enter data in Student Records tables by academic program. How much history data you convert is up to you.

This section lists prerequisites and discusses how to:

- Populate tables for student records.
- Convert enrollment data.

### **See Also**

[Chapter 3, "Preparing for Data Conversion," Converting Recruiting and Admissions and Campus Community Data, page 44](#)

## Prerequisites

Some of the tables, as noted in the Converting Recruiting and Admissions and Campus Community Data section, must be loaded before you load the student records data.

## Populating Tables for Student Records

At a minimum for Student Records, set up these tables in the sequence they are listed.

For the course catalog and schedule of classes, there is PeopleCode behind the COURSE\_ID field to increment a new course ID by 1. To mimic what this PeopleCode does, the conversion program needs to do the +1 logic. You can manually set the next available course ID in the installation table for Campus Solutions. You should update the last course ID assigned in the Installation table, so that you do not have collisions between the course IDs assigned by the conversion and course IDs manually created later.

In addition to the conversion program you write to create the catalog, you should set the Status field on the Catalog Data page to *Active* so that the course is active as soon as you run the conversion program to create the record.

### **Course Catalog Tables**

Populate these tables for the course catalog:

- CRSE\_CATALOG
- CRSE\_COMPONENT
- CRSE\_OFFER

### ***Schedule of Classes Tables***

Populate these tables for the schedule of classes:

- CLASS\_TBL
- CLASS\_ASSOC
- CLASS\_COMPONENT

### ***Student Careers and Plans***

Populate these tables for student careers and plans:

- STDNT\_CAREER
- STDNT\_CAR\_SEQ
- ACAD\_PROG
- ACAD\_PLAN

### ***Student Degrees***

Populate these tables for student degrees:

- DEGREE\_TBL: populate this table manually.
- ACAD\_DEGREE.
- ACAD\_DEGR\_HON.
- ACAD\_DEGR\_PLAN.
- ACAD\_DEGR\_SPLN.

### ***Grades***

Populate these tables manually for grades:

- GRADING\_SCHEME\_TBL
- GRADE\_BASIS\_TBL
- GRADE\_TBL

### **Student Term Data**

Populate these tables for student term data:

- STDNT\_CAR\_TERM
- ENRL\_REQ\_HEADER
- ENRL\_REQ\_DETAIL

### **See Also**

Chapter 4, "Reviewing Installation Setup and System Defaults," Selecting General Installation Options, page 57

*PeopleSoft Student Records 9.0 PeopleBook, "Setting Up the Course Catalog"*

## **Converting Enrollment Data**

There are three options to select for converting student enrollment data. Note that when you convert enrollment data you must create enrollment request input transactions and engage the enrollment COBOL engine to actually post the enrollments. This is the only way that the statistics on the STDNT\_CAR\_TERM table are automatically calculated.

Options for converting enrollment data are:

1. Convert the data as normal student enrollment data.

This is the recommended option. The course catalog and schedule of classes must be converted first, and you must have data for these as far back as you want to have enrollment data. The conversion program must create class association groups for the offerings when you convert the schedule of classes. In addition, a student career term must be present for every past term that you intend to convert. For each class section that you convert historically, you need an entry in the CLASS\_TBL. This does not mean that you must convert all of the class sections, just the sections that are graded. Even for graded sections the amount of data needed is minimal. For example, you may choose not to convert meeting times and instructors for classes. You may want to have the conversion programs roll all enrollments for a course in a term into one section. For example, if English 101 had 51 sections in fall 1996, you could create a Section 1 for that term and convert all 51 sections into that Section 1.

2. Convert enrollment data as internal transfer credit or other credit.

This option is necessary if you have only your course catalog but not your class schedule for as far back as you want to convert data. This method can make transcript printing a challenge, because past credits prior to conversion appear as transfer credit. Having split transcripts may also be an option, if issuing two transcripts for a student is acceptable—one from the old system for prior work and one from the new Campus Solutions system for all work after you bring the system up. In this case, you would still want to convert the enrollment data by summary transfer credit, so that the prior system's term academic statistics roll into Campus Solutions.

3. Use the Historical Course Enrollment page (Manage Student Records, Manage Academic Records, Use, Historical Course Enrollment) and convert statistics in summary by using the transfer credit engine.

If you cannot go through the effort to convert prior enrollment history, or the data is not available to you electronically to reconstruct prior course catalog and schedule of classes data, use the Historical Course Enrollment page. Create an SQR or other program to directly load enrollment data onto the Historical Course Enrollment page, and manually clean up this data. If you select this option, convert summary statistics by using the transfer credit COBOL process.

### **See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Using Enrollment-Related Processes," Creating Historical Enrollment Records

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## **Converting Student Financials Data**

This section lists prerequisites and discusses how to populate tables for student financials.

### **Prerequisites**

Student Financials receives data from many of the other Campus Solutions applications. For this reason, you must set up parts of other applications before you can convert the student financials information.

You must convert personal data tables and external organizations data before you convert student financials data.

### **See Also**

[Chapter 3, "Preparing for Data Conversion," Converting Recruiting and Admissions and Campus Community Data, page 44](#)

## **Populating Tables for Student Financials**

This list presents information about populating the tables related to Student Financials:

- General Ledger (GL).

Make sure that the GL information is set up on the Item Type table. You can convert the data and run a GL interface to set the GL fields, or you can convert the fields as having already been sent to the GL.



- Financial Aid.

Another important consideration in the sequencing of the student financials conversion is processing financial aid. If you are thinking about going live with financial aid and its disbursements at mid-year, consider the effect on the coordination of disbursing financial aid and the balance of the student's account for the year. For example, the disbursed fields in Financial Aid should be in sync with the amounts in Student Financials, if automated disbursement is to take place for that particular term. In addition, anticipated aid is used in numerous processes in Student Financials. Therefore, an important consideration is the conversion of anticipated aid for current processing cycles, as conversion or lack of conversion affects student financials processes. You should ensure that conversion is for fall term, rather than for mid-year, for these reasons.

- Payment Plans.

Third-party processing and payment plans are also an important conversion issue for student financials. To take advantage of Student Financials processing for payment plans and third-party processing, ensure that the conversion of this data occurs and that separate accounts are created for the various contracts that you have established for student sponsorship or extended payment options.

- Posting.

The major focus of the conversion effort for student financials is getting all of the old account and transaction information into the new system. The primary vehicle for converting the information is posting. It is possible to directly update the processing tables with data from the legacy system. However, it is much safer and cleaner to use the posting process to convert the legacy data. This is not to say that you do not need to update the information after posting. Using the posting process gives you cleaner data and provides a base upon which you can edit the information.

Create groups and use the group posting process to get the information on the system. Update other information as needed. The group posting process enables you to break down and track student populations and time categories into meaningful groups that you can edit and correct. Possible group scenarios might be academic—that is, for example, convert all medical school students, dental students, veterinary students. Another possible categorization is using time-based groups. You may want to break the student population into groups by term.

However you break down the groups, plan the data mapping carefully between the group posting tables and the current legacy data. Run several trials of posting groups and test the system to see if it processes correctly from adjusting tuition, adjusting financial aid disbursements, and producing a bill.

- Tuition Charges.

If you are planning to use the tuition calculation process to convert tuition charges for prior terms, you have two options. You can either convert and post all the information from prior terms, or you can skip the tuition charges and use the tuition calculation process for prior terms as the method for converting the data. The former option does not require the conversion of academic data from prior terms; the latter does require that correct academic data be converted prior to the student financial data.

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## Converting Contributor Relations Data

This section lists prerequisites and discusses how to:

- Populate tables for Contributor Relations.

- Create accumulated records for gift and pledge inquiry.

## Prerequisites

Contributor Relations uses data from some of the other Campus Solutions applications. For this reason, you must set up Student Financials item types and related general ledger information as well as Human Resources departments before you can convert some of the contributor relations information.

## Populating Tables for Contributor Relations

At a minimum for Contributor Relations, set up these tables.

### ***Organization Structure Tables***

Populate these tables for organization structure:

- INSTITUTION\_TBL
- CAMPUS\_TBL
- DEPARTMENT\_TBL
- AV\_BUS\_UNIT\_TBL

### ***Campus Community and Constituent Tables***

Populate these tables for Campus Community and constituent data:

- PERSONAL\_DATA.
- PERS\_DATA\_EFFDT.
- PERS\_NAME\_TYPE.
- DISABILITY: required for PERS\_DATA\_EFFDT and PERSONAL\_DATA to function properly.
- DIVERSITY: required for PERS\_DATA\_EFFDT and PERSONAL\_DATA to function properly.
- NAMES.
- ADDRESS\_TYPE.
- ADDRESSES: to display or convert any address information, including that on PERSONAL\_DATA.
- EXT\_ORG\_TBL.
- AV\_CNST\_TYP\_TBL.
- AV\_LEGACY\_DEG: to convert alumni degree records if you do not want to create all previously existing academic structures in the student records tables.

Otherwise, all of the Student Careers and Plans and Student Degrees tables listed in the Converting Student Records Data section are required for tracking academic data.

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**Note.** The EXT\_ORG\_ID field should be left blank for PeopleSoft data. This field is used to store data for external organizations. When dealing with an organization, you would leave EMPLID blank and load the EXT\_ORG\_ID for the organization.

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### ***Gift Tables***

Populate these tables for gifts:

- AV\_SESSION\_TBL: required.
- AV\_BTCH\_TOT: required.
- AV\_GIFT\_DTL: required.
- AV\_DESIGNATION: required.
- AV\_RECOGNITION: required.
- AV\_RCG\_DES: required.
- AV\_MTCH\_GIFT: optional.
- AV\_TRIBUTE\_DTL: optional (In Honor Of or In Memory Of).
- AV\_TRIBUTE\_NTFY: optional.

### ***Pledge Tables***

Populate these tables for pledge data:

- AV\_SESSION\_TBL: required.
- AV\_BTCH\_TOT: required.
- AV\_PLEDGE\_DTL: required.
- AV\_DESIGNATION: required.
- AV\_RECOGNITION: required.
- AV\_RCG\_DES: required.
- AV\_PLDG\_SCHD: required for active pledges but optional for complete pledges.
- AV\_TRIBUTE\_DTL: optional (In Honor Of or In Memory Of).
- AV\_TRIBUTE\_NTFY: optional.
- AV\_SESSION\_TBL.

Populate all key fields, plus all other fields you can populate. The SESS\_STATUS = O for trial runs but should ultimately be set to P for posted. The user ID is important here as it dictates security. (They can all have the same user ID, such as PS.) The ACKN\_FLG field should be set to Y.

- AV\_GIFT\_DTL.

Populate all key fields, plus all other fields you can populate. The FISCAL\_YEAR (CCYY) should be populated. The SESSION\_NO should start with one and increment by one for every group of 100 records, if the organization chooses to abide by the recommendation of 100 records per session. The SEQ\_NO should be 1 for historical data, provided these are all just gifts and not adjustments. The sequence is one for the original gift and increments (by two within the AV\_GIFT\_DTL table—for example 1, 3, and 5), with each adjustment made to the original gift. The SEQ\_NO in the AV\_ADJ\_GIFT\_DTL table increments with even numbers by two to indicate the offsetting record to the related AV\_GIFT\_DTL record. The ACKN\_FLG field should be set to Y.

---

**Note.** If you don't want historical gifts to get an acknowledgement, then set the AV\_SESSION\_TBL.ACKN\_FLG field to Y.

---

- AV\_DESIGNATION.

Populate all key fields, plus all other fields you can populate. This is not a setup table, but an allocation of the gift detail record to one or more designations.

---

**Note.** Amounts can default to the gift amount if there is only one designation or recognition per gift. If there is more than one designation or recognition per gift, then the amount fields need to be populated with actual amounts or percentages.

---

- AV\_RECOGNITION.

Populate all key fields, plus all other fields that you can populate. RCG\_PCT\_AMT and RCG\_APPLIED should be mapped to gift amount (if there is only one recognition per gift). The RECOGNITION\_TYPE = H for hard credit. For soft credit, there are different types (such as vehicle credit) that are defined by the institution. No soft credit Values are: delivered. RECOGNITION\_TYPE is a setup value, with H being a delivered, required value.

- AV\_RCG\_DES.

Populate all key fields, plus all other fields that you can populate. RCG\_DES\_AMT and CHARITABLE\_AMT should be mapped to gift amount (if there is only one recognition or designation per gift). For Soft Credit CHARITABLE\_AMT = 0.

---

**Note.** For converted active pledges to have pledge payments made against them, the AV\_SESSION\_TBL.SESS\_STATUS field for the pledge session must be set to P.

---

## Creating Accumulated Records for Gift and Pledge Inquiry

In Contributor Relations, the system runs Giving Profile and Commitment Summary online reports based on summary accumulator records rather than detailed transaction records. For the proper information to appear on these reports, you must initialize the summary accumulator records for all constituents and all gifts and pledges in the system. Contributor Relations delivers a Constituent Accumulator Initialization Application Engine process (AV\_ACC) to perform this task. To access the process, select Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Initialize CR, Accumulator Initialization. When initialized, incremental accumulations take place for affected constituents during the Constituent Accumulator process. You can run this process either by itself or along with the GL Interface job.

The Constituent Accumulator Initialization process is a resource-intensive process that requires an extended background processing window. The process deletes and recalculates all data from the accumulator records (PS\_AV\_CNST\_ACC, PS\_AV\_CNST\_ACC\_DES, and PS\_AV\_CNST\_ACC\_FY). If all transactions contained within in-process sessions are first completed (their session status changes to *Posted*), do not select the Search for unposted Pledge Payments and Search for unposted Matching Gifts options. This improves the performance of the initialization process.

---

**Note.** If you do not complete the initialization process, the system does not complete the information displayed online on the Giving Profile and Commitment Summary pages.

---

If additional groups of constituents are required to allow the process to complete within the particular background processing window, the records in the PS\_AV\_ACCUM\_INIT table can be modified to include more, smaller groups. Remember, however, that additional occurrences of the temporary tables used by the AV\_ACC Application Engine process are required if you run more than the delivered five processes at any one time.

**See Also**

[Chapter 21, "Setting User Defaults," page 387](#)

*PeopleTools PeopleBook: PeopleSoft Application Engine*



## Chapter 4

# Reviewing Installation Setup and System Defaults

This chapter provides an overview of installation setup and system defaults and discusses how to:

- Select general installation options.
- Select country-specific information.
- Select student administration installation options.
- Set up primary permission list preferences.

---

## Understanding Installation Setup and System Defaults

There are several settings on the system's installation pages that you should review before setting up any of the Campus Solutions applications. Specifically, you should review settings that point the system to the applications that you have installed, settings that begin and maintain incremental numbering, and settings that define basic default values throughout the system. It is a good idea to review the country codes and country address formats defined on the installation pages, too. If any of these settings are not correct or do not reflect the institution's design decisions, you could experience problems getting the system to operate properly.

---

## Selecting General Installation Options

To set up general installation options, use the Installation Table component (INSTALLATION\_TBL).

This section discusses how to:

- Select installed applications.
- Select product-specific values.
- Set up ID numbering.

---

**Note.** Only the pages that are relevant for Campus Solutions are described here.

---

### **See Also**

PeopleSoft Human Resources Management System documentation

## Pages Used to Select General Installation Options

Page Name	Definition Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Select which PeopleSoft applications and application parameters are installed on the system. Ensure that the settings on this page are accurate before using the Campus Solutions system.
Product Specific	INSTALLATION_TBL1A	Set Up HRMS, Install, Installation Table, Product Specific	Set up product-specific values for Campus Solutions.
Last ID Assigned	INSTALLATION_TBL2	Set Up HRMS, Install, Installation Table, Last ID Assigned	Set up ID assignment numbers for Campus Solutions.

## Selecting Installed Applications

Access the Products page (Set Up HRMS, Install, Installation Table, Products).

**Products** | HRMS Options | Product Specific | Country Specific | Last ID Assigned | Third Party/System

**Installed Products**

<input checked="" type="checkbox"/> Human Resources	<input type="checkbox"/> Education and Government	<input checked="" type="checkbox"/> Student Administration	<input checked="" type="checkbox"/> eBenefits
<input checked="" type="checkbox"/> Benefits Administration	<input type="checkbox"/> Federal	<input checked="" type="checkbox"/> Contributor Relations	<input checked="" type="checkbox"/> eDevelopment
	<input type="checkbox"/> French Public Sector	<input checked="" type="checkbox"/> Gradebook	<input checked="" type="checkbox"/> eCompensation
<input checked="" type="checkbox"/> Pension Administration	<input checked="" type="checkbox"/> Currency Conversion Utility	<input type="checkbox"/> Campus Self Service	<input checked="" type="checkbox"/> eComp Mgr
<input checked="" type="checkbox"/> Stock Administration	<input type="checkbox"/> Pay/Bill Management	<input type="checkbox"/> Recruit Workforce	<input checked="" type="checkbox"/> ePay
<input checked="" type="checkbox"/> Time and Labor	<input checked="" type="checkbox"/> Directory Interface	<input checked="" type="checkbox"/> Resume Processing	<input checked="" type="checkbox"/> ePerformance
<input checked="" type="checkbox"/> Mobile Time Management	<input checked="" type="checkbox"/> Payroll Interface for ADP	<input checked="" type="checkbox"/> eRecruit	<input checked="" type="checkbox"/> eProfile
	<input type="checkbox"/> Employee Portal	<input checked="" type="checkbox"/> eRecruit Mgr	<input checked="" type="checkbox"/> eProfile Mgr
<input checked="" type="checkbox"/> Absence Management	<input type="checkbox"/> Government Portal		
<input checked="" type="checkbox"/> Payroll for North America	<input type="checkbox"/> Campus Portal		
<input checked="" type="checkbox"/> Payroll Interface	<input checked="" type="checkbox"/> HRMS Portal Pack		
<input checked="" type="checkbox"/> Global Payroll Core	<input checked="" type="checkbox"/> General Ledger		
<a href="#">Installed GP Countries</a>	<input type="checkbox"/> Enterprise Learning Management		
<a href="#">Installed Integration Packs</a>			

Products page



If the institution has installed only the Campus Solutions application, then clear the Human Resources check box and select the Student Administration check box. If Human Resources is selected but that application is not installed, values set to appear automatically in the Campus Solutions system might not appear, and you could get random error messages as you navigate through the system.

If you installed PeopleSoft Contributor Relations, select the Contributor Relations check box, along with the Student Administration check box.

If the institution has installed both the HRMS and Campus Solutions applications, then select both the Human Resources and Student Administration check boxes. If you have both applications, you might review the other settings to determine if they are set properly for HRMS.

The Campus Self Service product combines a group of self-service applications. These applications are used with Campus Solutions. If you have installed this product or any self-service application, select the appropriate check box here.

**Note.** When both HRMS and Campus Solutions applications are installed, the Campus Solutions functions take precedence over HRMS. That is, where the two applications have similar features or the same tables, the system points to the Campus Solutions features or tables first.

## Selecting Product-Specific Values

Access the Product Specific page (Set Up HRMS, Install, Installation Table, Product Specific).

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p><b>Benefits Functions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> FMLA Administration</li> <li><input type="checkbox"/> COBRA Administration</li> <li><input type="checkbox"/> Benefits Billing</li> <li><input type="checkbox"/> Retroactive Benefits/Deduction</li> <li><input checked="" type="checkbox"/> FSA Claims Administration</li> </ul> <p>Start Date for BenAdmin: 01/01/1999</p> </div> <div style="width: 30%;"> <p><b>NA Payroll / Payroll Interface</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Concurrent Calc/Confirm</li> <li><input checked="" type="checkbox"/> Automatic Employee Tax Data</li> <li><input checked="" type="checkbox"/> Use State Residence for Local</li> </ul> </div> <div style="width: 30%;"> <p><b>Human Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Multi-Company Organization</li> <li><input type="checkbox"/> Automatic Job Termination</li> <li><input type="checkbox"/> Automatic Job Suspension</li> <li>'Temporary SSN' Mask: 999</li> <li>EMPLID Field Length: 4</li> </ul> </div> </div>					
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p><b>Federal Functionality</b></p> <p>*Default Pay Basis: Per Annum</p> </div> <div style="width: 30%;"> <p><b>T&amp;L / NA Payroll Paysheet Opt</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Change Final Check</li> <li><input type="checkbox"/> Change Online Check</li> <li><input type="checkbox"/> Change Reversal Adjustments</li> <li><input checked="" type="checkbox"/> Load in Preliminary Calc</li> </ul> </div> <div style="width: 30%;"> <p><b>General Ledger</b></p> <p>GL Version N/A</p> <p>Update Version</p> </div> </div>					
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p><b>AP Invoice Number Prefix</b></p> <p>AP Inv. Prefix: H</p> </div> <div style="width: 30%;"> <p><b>Combination Editing Caching</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Cache Validations</li> <li>Cache Retention Days 0</li> </ul> </div> </div>					

Product Specific page

## Human Resources

### EMPLID Field Length

Define the length of all new IDs created in the system for both people and organizations. The default value is 4 characters but can be changed to a maximum of 11. This value is used to calculate the number of zeros that will precede an ID when the system automatically generates a new ID.

For example, using the default length of 4, a system-generated ID or organization ID will be 0001, 0002, 0003, and so forth. When ID 9999 is generated, the system no longer inserts preceding zeros before the ID number. The next system-generated ID will be 10000.

## Setting Up ID Numbering

Access the Last ID Assigned page (Set Up HRMS, Install, Installation Table, Last ID Assigned).

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System
Last Employee ID Assigned:		<input type="text" value="100"/>		Last H/S Claim # Assigned: <input type="text" value="94000"/>	
Last HS Non-Employee ID Assgn:		<input type="text" value="1924002"/>		Last Incident # Used: <input type="text" value="70000007"/>	
Last TL Contractor ID Assigned:		<input type="text"/>		Last Journal # Assigned: <input type="text"/>	
Last COBRA Emplid Assigned:		<input type="text" value="10002"/>		Last Help Context # Used: <input type="text" value="10000000"/>	
Last Position # Used:		<input type="text" value="19360016"/>		Last Retro Pay Request Seq #: <input type="text" value="124129"/>	
Last Grievance # Used:		<input type="text" value="1"/>		Last Retro Ded Request Seq #: <input type="text"/>	
Last Car # Assigned:		<input type="text" value="3616008"/>		Last FSA Claim # Assigned: <input type="text" value="10039"/>	
Last Demand ID Assigned:		<input type="text" value="19"/>		Last Illness # Assigned: <input type="text"/>	
Last Combination Code Assigned:		<input type="text" value="52"/>		Last Illness Report # Assigned: <input type="text"/>	
Last AP Invoice Number:		<input type="text"/>		Last Temp Assignment # Used: <input type="text"/>	
				Last Used Element Number: <input type="text" value="181688"/>	
				Last OSHA Case # Assigned: <input type="text" value="9045"/>	

Last ID Assigned page

**Last Employee ID Assigned** Enter the next ID number that you want the system to assign, for both people and organizations, when the system automatically generates IDs.

## (AUS, CAN, JPN, NZL, NLD) Selecting Country-Specific Information

PeopleSoft Campus Solutions applications support specific demographic data for the U.S., Canada, Australia, New Zealand, and the Netherlands.

This section discusses how to enter country-specific information.

## Page Used to Select Country-Specific Information

Page Name	Definition Name	Navigation	Usage
Country Specific	INSTALLATION_TBL3	Set Up HRMS, Install, Installation Table, Country Specific	Enter country-specific installation information.

## Entering Country-Specific Information

Access the Country Specific page (Set Up HRMS, Install, Installation Table, Country Specific).

Country Specific page

Click the Installed HR Countries link to access the Installed HR Countries page, where you can enter which country-specific collapsible sections you want displayed in the system.

### See Also

*PeopleSoft HRMS Application Fundamentals PeopleBook, "Setting Up Local Country Functionality"*

## Selecting Student Administration Installation Options

To set up installation options, use the Student Admin Installation component (INSTALLATION\_SA).

This section discusses how to:

- Set up incremental numbering.
- Select country-specific features and enable CRM for Higher Education feature.

## Pages Used to Select Student Administration Installation Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Installation Student Admin (Installation Student Administration)	INSTALLATION_SA	Set Up SACR, Install, Student Admin Installation, Installation Student Admin	Set up or review incremental numbering for items throughout the system.
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	Turn on country-specific features. Enable the CRM for Higher Education feature.

## Setting Up Student Administration Options

Access the Installation Student Admin page (Set Up SACR, Install, Student Admin Installation, Installation Student Admin).

Installation Student Admin
SA Features

## Installation Student Administration

Auto-Numbering Parameters

Last Course ID Assigned:	<input type="text" value="666673"/>	Last Test Type Rec Nbr:	<input type="text" value="100007"/>
Last Equiv Course ID Assigned:	<input type="text" value="5103"/>	Last ATP Rec Nbr:	<input type="text" value="15781"/>
Last Course Sharing Sequence:	<input type="text" value="9201"/>	Last External SA Event ID:	<input type="text"/>
Last Course List Sequence:	<input type="text" value="198"/>	Last Event Nbr Assigned:	<input type="text" value="21861"/>
Last Facility ID Assigned:	<input type="text" value="1000"/>	Transcript Default Date:	<input type="text" value="01/01/3000"/> <small>31</small>
Last Class Note ID Assigned:	<input type="text" value="4"/>	Last Topic Link Assigned:	<input type="text" value="162"/>
Last Enroll Target Seq Number:	<input type="text" value="750"/>		
Last Application Nbr Assigned:	<input type="text" value="24335"/>		
Last Requirement ID:	<input type="text" value="1186"/>		
Last Requirement Group:	<input type="text" value="8040"/>		

Default Values

Academic Institution:	<input type="text" value="PSUNV"/> <small>🔍</small>	PeopleSoft University
-----------------------	---	-----------------------

Academic Advisement

Use:  Academic Advisement - or -  Program Guide - or -  Not in Use

Installation Student Admin page

### Auto-Numbering Parameters

Each field on this page is automatically incremented or automatically appears by default throughout the system. Set the last used numbers so that automatic numbering does not create numbers that already exist in the data.

If you want the increments of any of these fields to start at a number other than zero, enter that number on this page before you do anything else in the system.

---

**Note.** After you have begun converting or entering data and running processes, you can access this page to determine the last number that was incremented for each of the fields listed, but you should *not* change the numbers.

---

- |   |  |
|---|--|
| <b>Last Course ID Assigned</b>  | Displays the last course ID assigned. Used by PeopleSoft Student Records.          |
| <b>Last Equiv Course ID Assigned</b> (last equivalent course ID assigned) | Displays the last equivalent course ID assigned. Used by Student Records.          |
| <b>Last Course Sharing Sequence</b>                                       | Displays the last course sharing sequence. Used by PeopleSoft Academic Advisement. |

<b>Last Course List Sequence</b>	Displays the number of the last course list created. Used by Student Records for enrollment requirements; also used by Academic Advisement for regular academic advisement course lists and for Program Guide course lists.
<b>Last Facility ID Assigned</b>	Displays the last facility ID assigned. Use to enable the system to display by default an automatically incremented facility ID number each time that you create a new facility on the Facility Table setup page. If you do <i>not</i> want to use auto incremental numbering, you are required to enter a value for Facility ID when adding a new facility.  Used by various applications.
<b>Last Class Note ID Assigned</b>	Displays the last class note ID assigned. Used by Student Records.
<b>Last Enroll Target Seq Number</b> (last enrollment target sequence number)	Displays the last enrollment target sequence number. Used by Student Records and Recruiting and Admissions for Enrollment Management Enrollment Targets.
<b>Last Application Nbr Assigned</b> (last application number assigned)	Displays the last application number assigned. Used by Recruiting and Admissions.
<b>Last Requirement ID</b>	Displays the number of the last requirement ID created. Used by Student Records for enrollment requirements; also used by Academic Advisement for regular academic advisement requirements and for Program Guide requirements.
<b>Last Requirement Group</b>	Displays the last requirement group. Used by Student Records for enrollment requirement groups; also used by Academic Advisement for academic requirement groups, including Program Guide requirement groups.
<b>Last Test Type Rec Nbr</b> (last test type record number)	Displays the last test type record number. Used in processing suspense records for data loads. Used by Recruiting and Admissions.
<b>Last ATP Rec Nbr</b> (last admissions testing program record number)	Displays the last ATP record number. If you enter <i>50,000</i> in this field, next time that you run the ATP data load SQR process (CCATPLOD), each school loaded will have a number assigned starting from 50,000. This field is not connected to the institution's unique ATP code. Used by Campus Community and Recruiting and Admissions.
<b>Last External SA Event ID</b> (last external student administration event ID)	Displays the last external student administration event ID. Used by various applications, including Contributor Relations.
<b>Last Event Nbr Assigned</b> (last event number assigned)	Displays the last event number assigned. Used by various applications, including Contributor Relations.
<b>Transcript Default Date</b>	Displays the transcript default date. This is the default date used for processing academic advisement degree audit reports. To set the default to the current date, leave this field blank. Used by Academic Advisement.

**Last Topic Link Assigned** Displays the last topic link ID assigned. Used by Student Records on the Catalog Data page.

### ***Default Values***

In this group box, enter an Academic Institution to use as a default throughout the system.

### ***Academic Advisement***

In this group box, enter an option that affects the type of advisement report that a student sees in self service.

- *Academic Advisement*: This option is selected by default. It indicates that the institution plans to use standard Academic Advisement functionality to populate a student's self-service advisement report.
- *Program Guide*: Select this option to indicate that the institution plans to use Program Guide functionality to populate a student's self-service advisement report
- *Not in Use*: Select this option to indicate that the school intends to use neither method.

### ***See Also***

*PeopleSoft Academic Advisement 9.0 PeopleBook*, "Managing Batch Academic Advisement Reports"

*PeopleSoft Campus Self Service 9.0 PeopleBook*, "Using Academic Advisement Self Service"

## **Selecting Country-Specific Features and Enabling CRM for Higher Education Feature**

Access the SA Features page (Set Up SACR, Install, Student Admin Installation, SA Features).

SA Features page

If CRM and Campus Solutions are both licensed at your institution, select the CRM for Higher Education check box to enable CS and CRM to share data in real time.

See [Chapter 26, "Introducing Customer Relationship Management for Higher Education," Enabling Integration with CRM for Higher Ed, page 468.](#)

***(AUS, CAN, NZL, NLD, and GBR) Country-Specific Features***

Select the appropriate check box to enable functionality specific to each country, which is setID-based.

---

**Important!** In order to use country-specific functionality in the system, you must also activate the country's features on the Academic Institution 6 setup page for institution-based functionality.

---

**DEST, HECS, Centrelink, TAC**

Select to enable Australian features: Department of Education, Employment and Workplace Relations reporting, Higher Education Contribution Scheme functionality, Centrelink reporting, and Tertiary Admissions Centre admissions functions.



<b>Last CART Request ID</b>	<p>Displays the last CART Request ID that the system assigned to a Centrelink Academic Reassessment Transformation (CART) request file. Each request file has a unique request ID.</p> <p>The system automatically increments the Last CART Request ID each time the CART Request File process loads a request file.</p> <p>If required, reset the Last CART Request ID number. Set a number so that automatic numbering does not create numbers that already exist in the data.</p> <p>This field appears only if you select the DEST, HECS, Centrelink, TAC check box.</p>
<b>Canada</b>	Select to enable Canadian reporting functionality.
<b>New Zealand</b>	Select to enable New Zealand features: National Student Index data and Single Data Return functionality.
<b>The Netherlands</b>	Select to enable Dutch functionality.
<b>United Kingdom</b>	Select to enable United Kingdom features.

**See Also**

[Chapter 6, "Designing Your Academic Structure," \(AUS, CAN, GBR, NZL, NLD\) Activating Other Student Administration Features, page 100](#)

---

## Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission List component (OPR\_DEF\_TBL\_HR).

This section provides an overview of primary permission lists and discusses how to:

- Set permission list defaults.
- Set industry sector and payroll information.

**See Also**

[Chapter 19, "Creating and Maintaining User Profiles," page 351](#)

*PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Campus Personal Information"*

*PeopleTools PeopleBook: Security Administration*

## Understanding Primary Permission Lists

When you are using the User Profiles Management process, it is necessary for you to set up primary permission lists when you give user IDs access to pages.








Use the Primary Permission List table to set predefined tableset sharing as well as systemwide defaults and settings for each of the primary permission lists. The system displays by default the values that you indicate for a particular permission list in the Primary Permission List Preferences table—such as business unit, setID, currency, country, or company code —when a user associated with that permission list logs in to Campus Solutions or Contributor Relations. You can tailor the Campus Solutions systems for each user, controlling the default values that users see on pages in the system.

## Pages Used to Set Up Primary Permission List Preferences

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Defaults	OPR_DEF_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List, Defaults	Set predefined tableset sharing and systemwide defaults for each primary permission list.
Settings	OPR_DEF_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List, Settings	Set the systemwide default settings for each permission list. By using this page, you can tailor the system for each permission list, controlling the default values that users see on pages in the system.

## Setting Permission List Defaults

Access the Defaults page (Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List, Defaults).

Defaults		Settings
<b>Primary Permission List:</b>	PSADMIN	PeopleSoft Administrator
	<input type="checkbox"/> <b>Alternate Character Enabled</b>	
<b>*Business Unit:</b>	CFABU 	Canadian Business Unit
<b>*SetID:</b>	PSUNV 	Peoplesoft University
<b>*Company:</b>	PSU 	PeopleSoft University
<b>*Country:</b>	CAN 	Canada
<b>Regulatory Region:</b>	CAN 	Canada
<b>*To Currency:</b>	CAD 	Canadian Dollar
<b>Currency Rate Type:</b>	OFFIC 	Official Rate

Defaults page

---

**Note.** These defaults override the defaults that you set for these options in the Installation table for this permission list.

The TableSet Record Group Control table regulates what users see in prompt tables.

---

**Alternate Character Enabled** Select to indicate if you want alternate character searching enabled for this permission list.

**Business Unit** Indicate the default business unit for this permission list from among the list of valid business units stored in the Business Unit table.

**SetID** Indicate the default setID for this permission list from among the list of valid set IDs stored in the TableSet ID table.

---

**Warning!** The values that you indicate here affect business unit and setID defaults for this permission list throughout the system.

---

**Company** Enter the default company for this permission list.

**Country** Enter the default country for this permission list.

**Regulatory Region** This field is not used in Campus Solutions.  
See PeopleSoft Human Resources Management System documentation

**To Currency** Select a currency to act as default values for this permission list in Campus Solutions.

**Currency Rate Type** Select a currency rate type to act as a default value for this permission list in Campus Solutions.

## Setting Industry Sector and Payroll Information

Access the Settings page (Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List, Settings).

Settings page

**Industry** Select the industry for this permission list. Select *Education* to indicate that this is an education database.

**Industry Sector** Select the industry sector for this permission list. Values are: *Core*, *Public Sct* (public sector), and *US Federal*.

**Carry ID** Select to carry an ID of the last individual or organization that you enter or select from search box to search box and page to page. You do not have to reenter or reselect the ID each time, if you want to continue editing or reviewing data for the same individual.

If you choose any country other than the U.S. on the Defaults page, country-specific fields may appear on the page as well.

**See Also**

PeopleSoft Human Resources Management System documentation



## Chapter 5

# Integrating Campus Solutions with Human Capital Management

This chapter provides an overview of Campus Solutions-to-Human Capital Management (CS-to-HCM) integration and discusses how to:

- Integrate person data.
- Integrate using External Search/Match.
- Integrate using the higher education constituent hub (HECH).
- Integrate setup data.

### **See Also**

*Campus Solutions-HCM Integration White Paper* on My Oracle Support, ID 751540.1.  
<http://support.oracle.com>

---

## Understanding CS-to-HCM Integration

The CS suite of products has historically resided in a single database instance with HCM. This coupling has enabled CS and HCM to share a person model, a single instance of a person in the system, and student refund processing through HR Payroll. The release of HCM 9.1 requires CS 9.0 and HCM to operate in separate instances. Separation is not mandatory until your institution upgrades to HCM 9.1; however, as of CS 9.0 Feature Pack 4, Oracle delivers the flexible toolset needed to integrate with a separated instance of HCM 9.0 as well as HCM 9.1. Whenever your institution decides to separate, its business processes will determine the proper way to integrate the separate instances; this chapter describes several possible integration approaches. Although the two databases will be separated, your institution still maintains the ability to search for people and maintain a single EmplID across CS and HCM.

Several implementation guides have been developed to assist in the integration effort. You can find them all posted to My Oracle Support.

See *Implementing Integration of Setup Data between CS and HCM* on My Oracle Support, ID 751540.1

See *Implementing Person Bio-Demo Data Integration between CS and HCM* on My Oracle Support, ID 751540.1

See *Implementing External Search/Match between CS and HCM* on My Oracle Support, ID 751540.1

See *Implementing CS Integration with the Higher Education Constituent Hub* on My Oracle Support, ID 751540.1

See *Implementing Portal Navigation aggregation for CS and HCM Integration* on My Oracle Support, ID 751540.1

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## Integrating Person Data

This section provides overviews of person data integration and business processes, and discusses how to:

- Publish and subscribe to person data.
- Review integrated person data.

## Understanding Person Data Integration

In CS 9.0 Feature Pack 4, Oracle has delivered the tools that provide for an integration of person data directly between the CS and HCM systems. The suite of person attributes is transferred primarily by the PERSON\_BASIC\_SYNC message. The data that comprises the message includes the core person data historically contained in PERSON\_BASIC\_SYNC, plus CS extension data (such as FERPA) contained in the PERSON\_SA message and global subrecords. Ethnicity and diversity information are also part of the integrated person data set. Subscription handlers enable inbound person additions and updates in both CS and HCM. PERSON\_BASIC\_SYNC can also subscribe to incoming person data from an external source.

As delivered, direct integration between CS and HCM requires only the use of Integration Broker to enable and orchestrate the integration. No additional integration mechanism is required.

The *Implementing Person Bio-Demo Data Integration between CS and HCM* guide provides the technical details of person data integration as well as configuration and messaging. It also provides details about subscription handlers and the global subrecords included in person data messaging.

CS also subscribes to the WORKFORCE\_SYNC message to bring job data (still mastered in HCM) into CS for those CS processes that require it (such as assigning an instructor to a class).

### See Also

*Implementing Person Bio-Demo Data Integration between CS and HCM* on My Oracle Support, ID 751540.1.

## Understanding the Business Process

In a shared CS-HCM instance, data is available in both systems and updates in either system change a single record. In a CS-to-HCM integrated environment, the person record is physically separated.

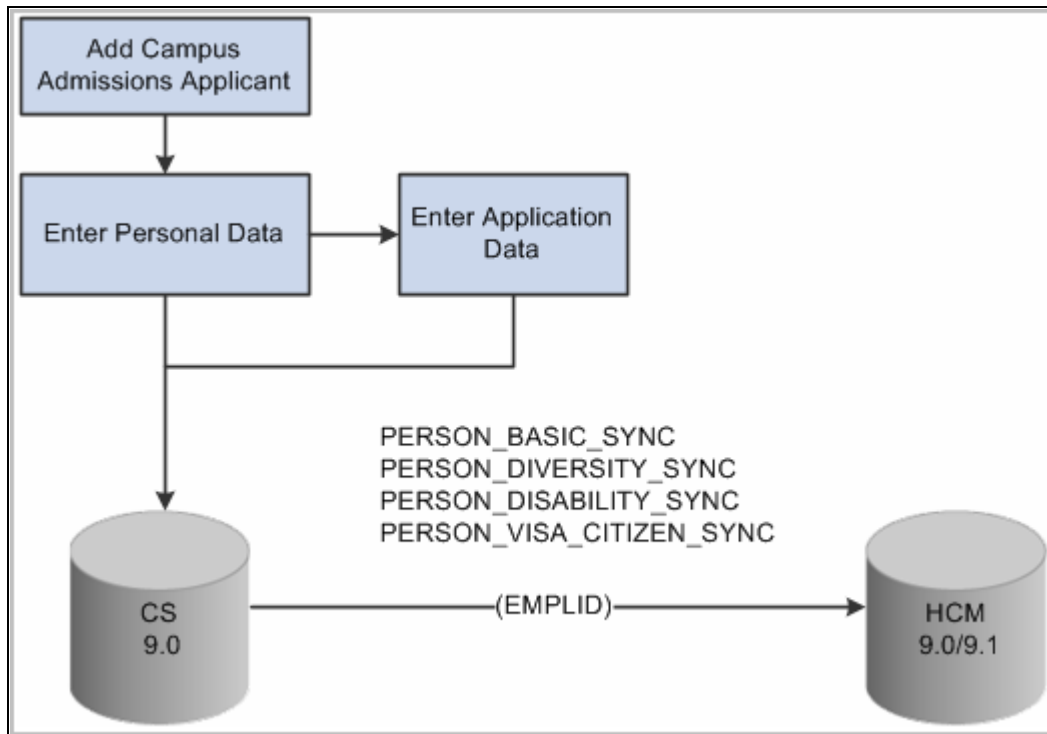


In thinking about the flow of person data between separated instances, institutions are no longer bound by the absolute sharing of data conferred by a single shared data model. Instead, they can use the tools described in this chapter to configure the integration to reflect the business needs of the institution. For example, some institutions would prefer to retain, as much as possible, the legacy model in which all person data is shared between CS and HCM; other institutions may want to separate not just their data but their business processes to more closely reflect policies of data ownership between student and human resources administration on campus.

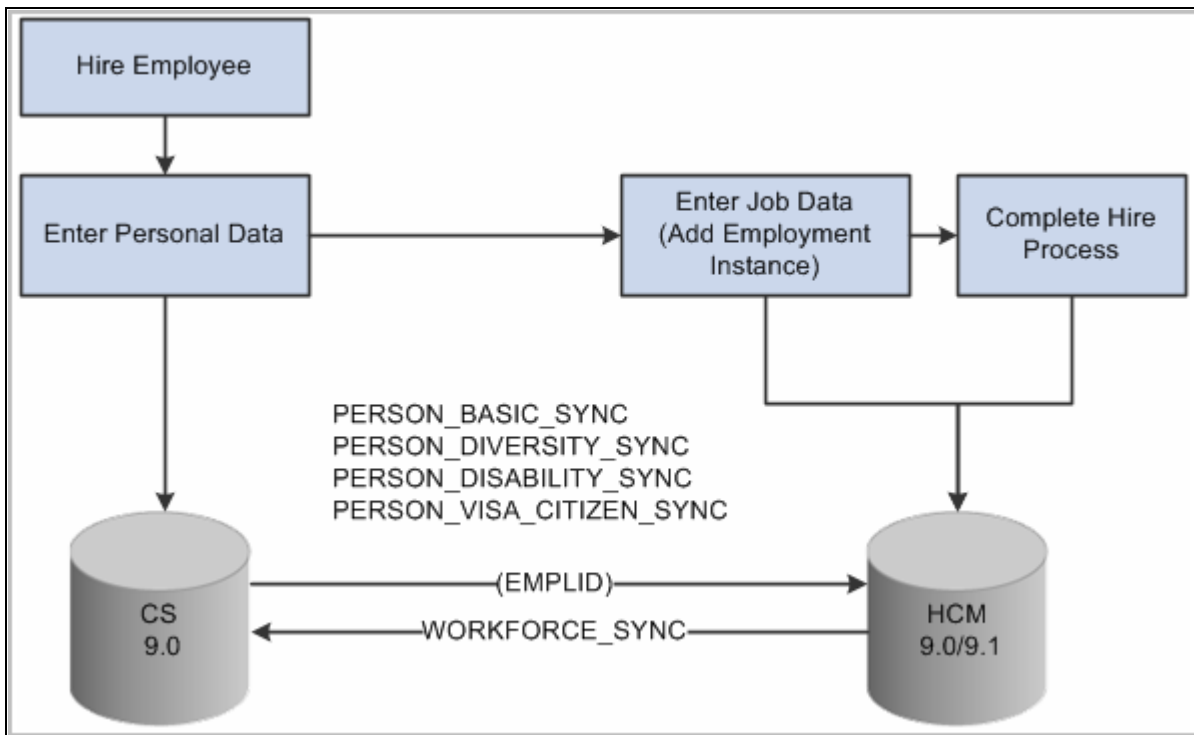
Campus Solutions supports three models of integration of person data between CS and HCM: Owner/Subscriber, Distinct Ownership, and integration using the Higher Education Constituent Hub.

#### *Owner-Subscriber*

In an owner-subscriber integration model, one system is defined as the system of record and the other system subscribes to its person data messages. All EmplIDs exist and are in sync in both databases. For example, if CS is defined as the owner for adding and updating person data, the HCM system subscribes to the person messages; integration setup feeds person data additions and updates to HCM. The end-user experience can be managed via a portal or related content to navigate a combination of CS and HCM menus and pages.



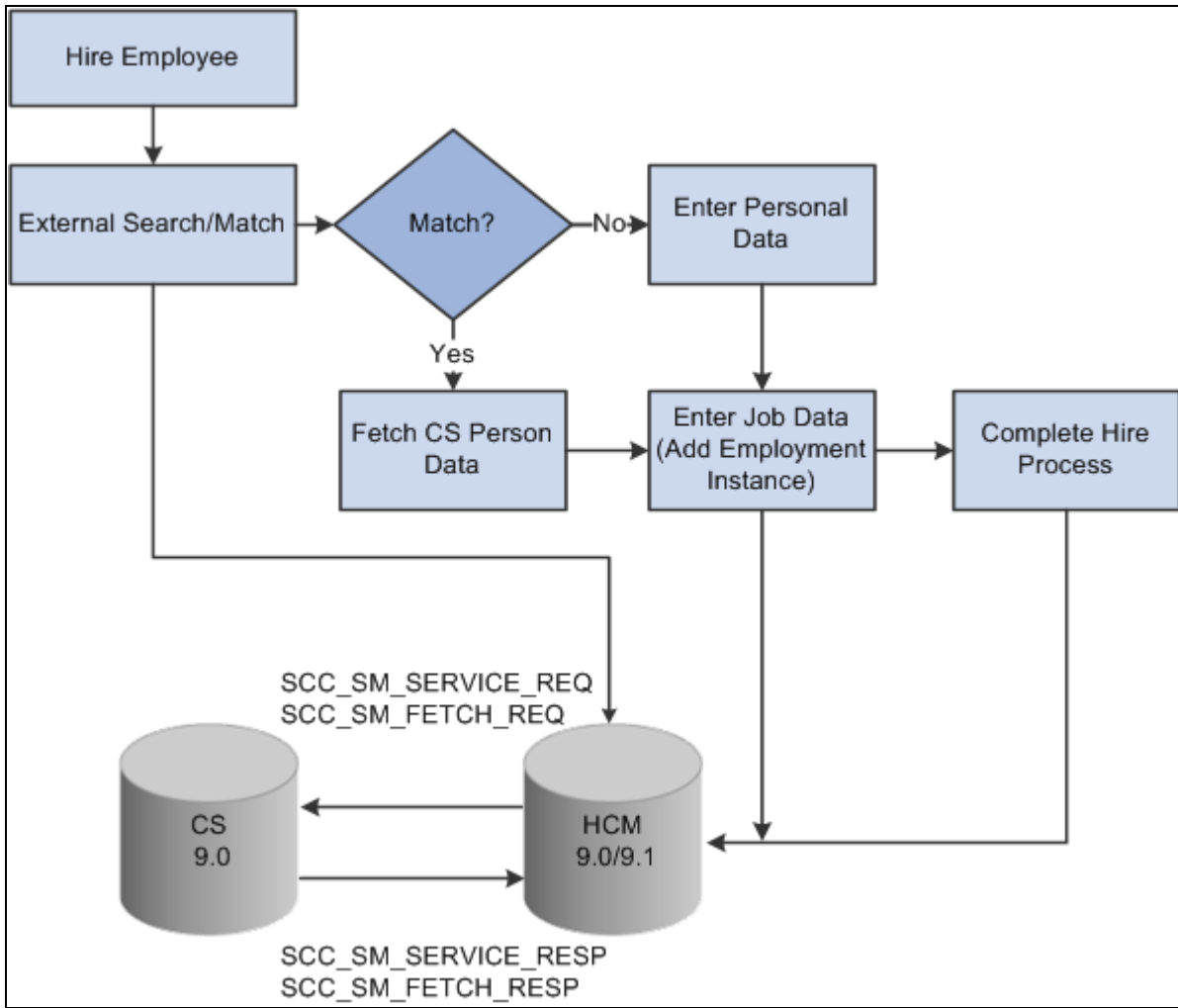
Example of adding an admissions applicant in CS



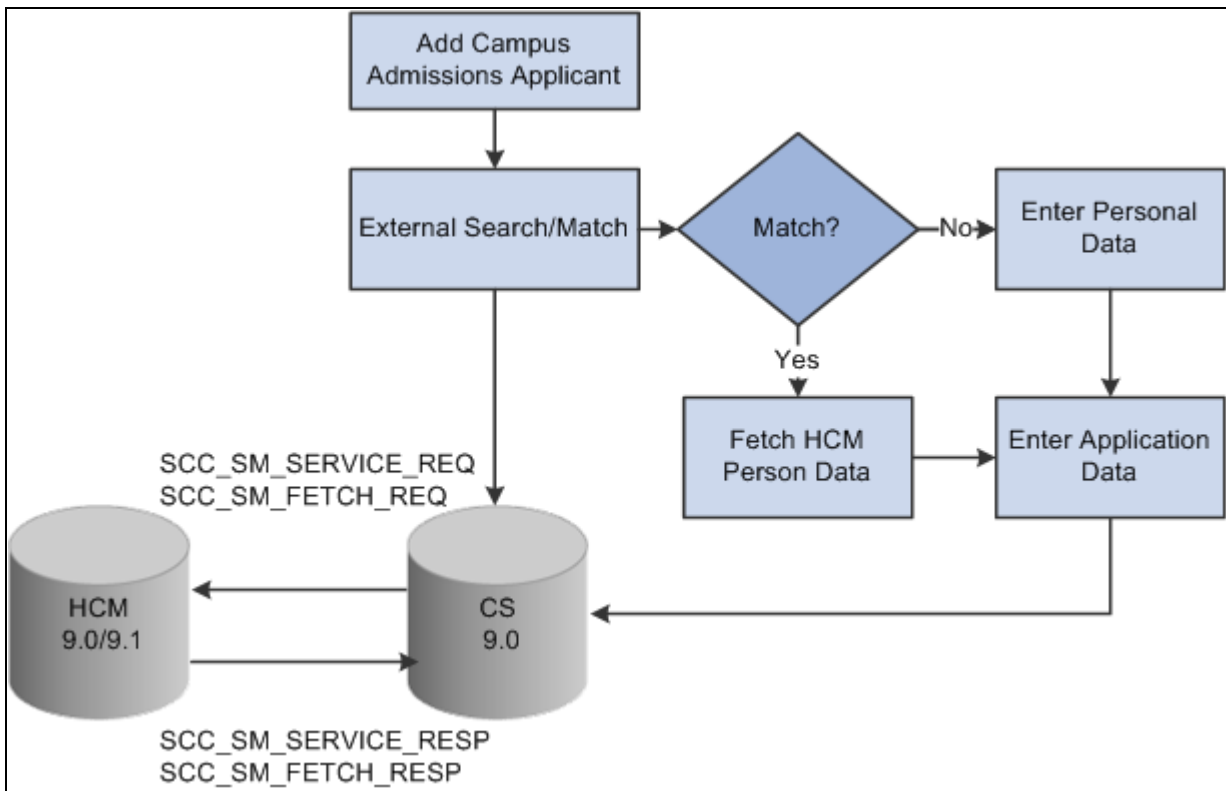
Example of hiring an employee in HR

### *Distinct Ownership*

In a distinct ownership integration model, person data is added and updated in the appropriate CS or HCM system (as determined by the business processes of your institution; for example, employees are added and maintained in HCM). External Search/Match then becomes the method used in each system to ensure that users do not create duplicate records on campus. For example, as an employee is added to HCM, External Search/Match determines whether that new employee is already a student in CS with an EmplID and other bio-demo data housed in the CS system. If so, a "fetch" process can pull that EmplID and person data to HCM, ensuring that the individual retains a single unique ID on campus. Thereafter, each system must be manually updated, with no further integration between them.



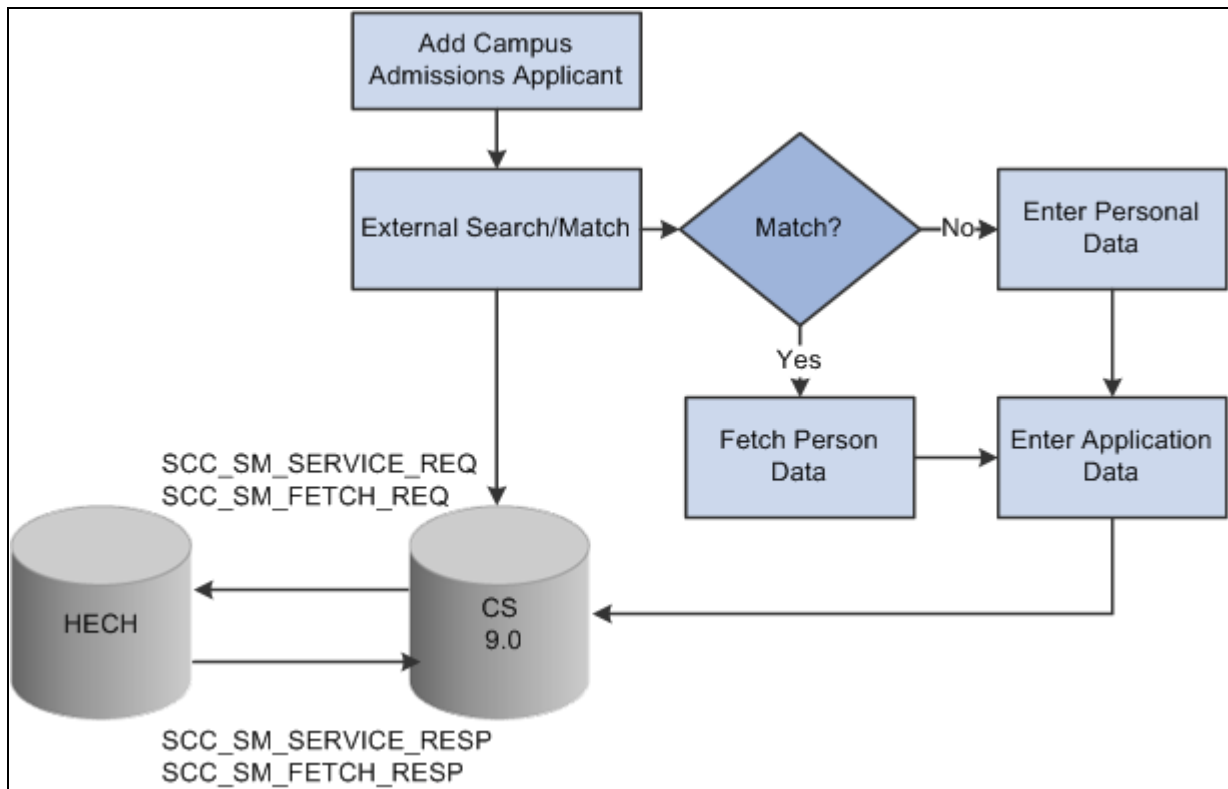
Example of hiring an employee in HCM using External Search/Match to CS



Example of adding an admissions applicant in CS using External Search/Match to HCM

*HECH*

In a HECH integration model, the HECH becomes the owner of all person data, and all other systems on campus subscribe to it. Your institution can use External Search/Match to ensure that users do not create duplicate records in your CS system.



Example of adding an admissions applicant in CS using HECH

**Note.** Oracle recommends that you set the installation option Last Employee ID Assigned field on the Last ID Assigned page to a range that does not cause conflicts in the two systems. The *Implementing Person Bio-Demo Data Integration Between CS and HCM* guide provides the configuration details for setting the Last Employee ID Assigned field in both systems.

No matter which model your institution uses to integrate CS and HCM, certain person data always passes from HCM 9.0/9.1 to CS 9.0; that list of data is discussed in the "Integrating Setup Data" section later in this chapter.

**Note.** For institutions choosing the owner-subscriber model, Oracle supports an architecture with CS 9.0 as the system of record (the owner of core person data for adds and updates) and HCM 9.0 or 9.1 as the subscriber. Oracle also recommends that HCM 9.0 or 9.1 become the system of record for setup data. The following sections provide more details on tools used to manage setup data as well as the owner-subscriber approach to managing data in separate database instances. For further information on other methods of using delivered tools to configure your integration, please refer to the *Implementing Person Bio-Demo Data Integration Between CS and HCM* guide on My Oracle Support.

### See Also

[Chapter 5, "Integrating Campus Solutions with Human Capital Management," Integrating Setup Data, page 83](#)

[Chapter 4, "Reviewing Installation Setup and System Defaults," Selecting General Installation Options, page 57](#)

## Publishing and Subscribing to Person Data

In an owner-subscriber integration approach, the following messages move data asynchronously from the owner to the subscriber:

- PERSON\_BASIC\_SYNC
- PERSON\_DIVERSITY\_SYNC
- PERSON\_VISA\_CITIZEN\_SYNC
- PERSON\_DISABILITY\_SYNC

The WORKFORCE\_SYNC message integrates job data between the two systems where necessary, from HCM to CS.

The *Implementing Person Bio-Demo Data Integration between CS and HCM* guide provides the technical details of moving person data between owner and subscriber.

## Reviewing Integrated Person Data

In the owner/subscriber model, the following person bio-demo and other data is synchronized between the systems:

- Names
- Addresses
- Phones
- Email Addresses
- National IDs
- Gender
- Birthdate
- Date of Death
- Marital Status
- FERPA Flag
- Disability
- Ethnicity/Diversity
- Citizenship
- Passport
- Visa/Permits
- Job

- HR Operator Defaults
- User Profiles

In the distinct ownership model, the following person bio-demo data is fetched from one system to the other:

- EmplID
- Names
- Addresses
- Phones
- Email Addresses
- National IDs
- FERPA Flag
- VA Benefit

The section on the HECH integration model lists the person data that is synchronized between systems.

See [Chapter 5, "Integrating Campus Solutions with Human Capital Management," Integrating CS Data to HCM Using the HECH Connector, page 83.](#)

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## Integrating Using External Search/Match

This section provides an overview of External Search/Match and discusses how to use External Search/Match to integrate with external systems.

### Understanding External Search/Match Integration

In a single-instance environment, users add persons in their respective application (HCM or CS). In an integrated, separate-instance environment using the distinct ownership model, users who want to maintain a single EmplID must use External Search/Match in each system to ensure the creation of unique person records. Initially, users use positive External Search/Match results to locate and add person data from the external system (such as a CS user searching against HCM); subsequently, person updates must be done manually in both instances to avoid becoming out of sync.

In both the distinct ownership integration and HECH integration models, External Search/Match is the tool used to ensure that only unique EmplIDs are added to any system. With distinct ownership, people are added in either the CS or HCM system (as appropriate); both systems use External Search/Match to search for possible duplicate records so only unique IDs are shared between the databases. However, both databases must be running in order for External Search/Match to work. With the HECH, External Search/Match can search against that system as it would any external system.

## Using External Search/Match to Integrate with External Systems

External Search/Match can search against the HECH, HCM 9.0, or HCM 9.1 to identify potential duplicate person records as well as carry EmplIDs throughout a business process.

### See Also

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up External Search/Match"

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using External Search/Match"

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## Integrating Using the HECH

This section provides an overview of HECH integration and discusses how to integrate CS data to HCM using the HECH Connector.

## Understanding HECH Integration

The HECH is a separately licensed product that manages bidirectional person data messaging and storage at the enterprise level, using broad data governance and data policy rules. When implemented, HECH becomes the single point of truth for person bio-demo data. HECH synchronizes this master data and transfers changes to all systems registered to it, by applying systemwide data validation policies set by your institution. The CS instance then becomes open to inbound information from other systems on campus.

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**Important!** When using the HECH to integrate multiple systems, data is mastered in the hub itself but is actually manipulated and maintained in its "spoke" systems (such as CS). Messaging between the systems and the HECH is asynchronous. Only high-level data stewards can update or access person data within the HECH, for maintenance or troubleshooting purposes.

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Oracle delivers the HECH Connector, a utility that assists with HECH integration by providing transformations and data mappings between CS and HECH, using Integration Broker. The HECH Connector contains Higher Ed Extensions for bio-demo data, affiliations, and External Search/Match. The *Implementing CS Integration with the Higher Education Constituent Hub* guide contains more information about the HECH, HECH Connector, and how to use these tools to manage bidirectional person data messaging.

### See Also

*Implementing CS Integration with the Higher Education Constituent Hub* on My Oracle Support, ID 751540.1.

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up External Search/Match"



## Integrating CS Data to HCM Using the HECH Connector

The HECH Connector enables CS to integrate core person data to a separated HCM instance, using Integration Broker messaging to communicate with the HECH. The HECH Connector integrates the following data:

- EmplID
- Name
- Address
- Phone
- Email address
- National ID
- VA benefit
- Marital status
- Education level
- Place of Death/Death Certificate Number
- Affiliations (outbound to HECH only)

### **See Also**

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Using Constituent Web Services"*

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## Integrating Setup Data

This section provides overviews of HCM-to-CS setup data and enterprise integration points (EIPs) for messaging between CS and HCM.

## Understanding HCM-to-CS Setup Data

In all integration configurations, some setup data underlies all person transactions. This setup data needs to be synchronized between the HCM instance and CS 9.0. The following list of the data is integrated in one direction, from HCM to CS:

- Address Types
- National ID Types
- Ethnic Groups
- HCM Business Units

- Currency Codes
- Company Codes
- Major Subject Codes
- Country Codes
- State Codes
- Departments
- Holiday Date Schedules
- Job Codes
- Locations
- Name Titles
- Name Types
- Name Prefixes
- Name Royal Prefixes
- Name Royal Suffixes
- Name Suffixes
- Name Formats
- POI Types
- Regulatory Regions
- SetIDs
- TableSet Controls
- U.S. Standard Occupational Codes
- Visa Permit Types
- Visa Permit Documents

## Understanding EIPs

Oracle delivers several EIPs to automate the process of synchronizing setup data between CS and HCM; this ensures that the setup data underlying the transactional data remains in sync. Other delivered EIPs enable your institution to integrate data in support of External Search/Match and core business processes. The Feature Pack 4 implementation guides contain detailed information on all delivered EIPs and web services. Note that person data EIPs are designated *sync* or *fullsync*. Fullsync EIPs republish all the data in their source records at once. Incremental sync EIPs send real-time sync messages; as soon as you make a change in the database of record, the system triggers the sync and sends only the changed information to the other database.

**See Also**

*PeopleTools PeopleBook: Integration Broker Testing Utilities and Tools*

*Implementing Integration of Setup Data between CS and HCM on My Oracle Support, ID 751540.1.*

*Implementing Person Bio-Demo Data Integration between CS and HCM on My Oracle Support, ID 751540.1.*

*Implementing External Search/Match between CS and HCM on My Oracle Support, ID 751540.1.*

*Implementing CS Integration with the Higher Education Constituent Hub on My Oracle Support, ID 751540.1.*

*Implementing Portal Navigation aggregation for CS and HCM Integration on My Oracle Support, ID 751540.1.*

**Delivered EIPs**

The following table lists delivered EIPs that support CS-to-HCM integration.

<b>EIP Name</b>	<b>Description</b>
ADDRESS_TYPE_FULLSYNC	Address Type Table
ADDRESS_TYPE_SYNC	Address Type Table
BUS_UNIT_HR_FULLSYNC	HR Business Unit Table
BUS_UNIT_HR_SYNC	HR Business Unit Table
COMPANY_FULLSYNC	Company Codes
COMPANY_SYNC	Company Codes
COMPETENCY_FULLSYNC3	College Major Subject Codes
COMPETENCY_SYNC3	College Major Subject Codes
COUNTRY_FULLSYNC	Countries
COUNTRY_SYNC	Countries
CURRENCY_FULLSYNC	Currency Codes
CURRENCY_SYNC	Currency Codes
DEPT_FULLSYNC	Departments
DEPT_SYNC	Departments

<b>EIP Name</b>	<b>Description</b>
ETHNIC_GRP_FULLLSYNC	Ethnic Group Table
ETHNIC_GRP_SYNC	Ethnic Group Table
HOLIDAY_DATE_FULLLSYNC	Holiday Date Schedules
HOLIDAY_DATE_SYNC	Holiday Date Schedules
JOBCODE_FULLLSYNC	Job Codes
JOBCODE_SYNC	Job Codes
LOCATION_FULLLSYNC	Company Site Locations
LOCATION_SYNC	Company Site Locations
NAME_PREFIX_SUFFIX_FULLLSYNC1	Name Prefixes
NAME_PREFIX_SUFFIX_FULLLSYNC2	Name Suffix Table
NAME_PREFIX_SUFFIX_FULLLSYNC3	Name Royal Pref Table
NAME_PREFIX_SUFFIX_FULLLSYNC4	Name Royal Suff Table
NAME_PREFIX_SUFFIX_SYNC1	Name Prefixes
NAME_PREFIX_SUFFIX_SYNC2	Name Suffix Table
NAME_PREFIX_SUFFIX_SYNC3	Name Royal Pref Table
NAME_PREFIX_SUFFIX_SYNC4	Name Royal Suff Table
NAME_TYPE_FULLLSYNC	Name Type Table
NAME_TYPE_SYNC	Name Type Table
NID_TYPE_FULLLSYNC	National ID Type Table
NID_TYPE_SYNC	National ID Type Table
OPR_DEF_FULLLSYNC	Operator Defaults Table - HR
OPR_DEF_SYNC	Operator Defaults Table - HR
PERS_POI_FULLLSYNC	Dflt Transaction Tbl for POIs
PERS_POI_SYNC	Dflt Transaction Tbl for POIs
PERSON_BASIC_FULLLSYNC	Person

<b>EIP Name</b>	<b>Description</b>
PERSON_BASIC_SYNC	Person
PERSON_DISABILITY_FULLSYNC	Disability
PERSON_DISABILITY_SYNC	Disability
PERSON_DIVERSITY_FULLSYNC	Diversity Data
PERSON_DIVERSITY_SYNC	Diversity Data
PERSON_VISA_CITIZEN_FULLSYNC1	EE/Dependent Citizenship
PERSON_VISA_CITIZEN_FULLSYNC2	EE/Depndnt Visa Support Docs
PERSON_VISA_CITIZEN_SYNC	EE/Dependent Citizenship
POI_TYPE_TBL_FULLSYNC	POI Type Table
POI_TYPE_TBL_SYNC	POI Type Table
REGULATORY_REGION_FULLSYNC	Regulatory Region
REGULATORY_REGION_SYNC	Regulatory Region
SETID_INITIALIZE	SetIDs
STATE_FULLSYNC	State Codes/Names w/in Country
STATE_SYNC	State Codes/Names w/in Country
SUPPORT_DOC_FULLSYNC	Visa Supporting Documents
SUPPORT_DOC_SYNC	Visa Supporting Documents
TBLSET_CONTROL_INITIALIZE	TableSet Control Records
TITLE_FULLSYNC	Title Table
TITLE_SYNC	Title Table
US_SOC_FULLSYNC	U.S. Standard Occupational Codes
US_SOC_SYNC	U.S. Standard Occupational Codes
USER_PROFILE	User Profiles
VISA_PERMIT_FULLSYNC	Visa Supporting Docs Needed
VISA_PERMIT_SYNC	Visa Supporting Docs Needed

<b><i>EIP Name</i></b>	<b><i>Description</i></b>
WORKFORCE_FULLSYNC	Job and Person Org Assignments
WORKFORCE_SYNC	Job and Person Org Assignments

## Chapter 6

# Designing Your Academic Structure

Set up your academic structure before using the full functionality of the PeopleSoft Campus Solutions system. Make sure that you understand how the institution structures campuses, academic careers, academic organizations, academic departments or groups, and subject areas.

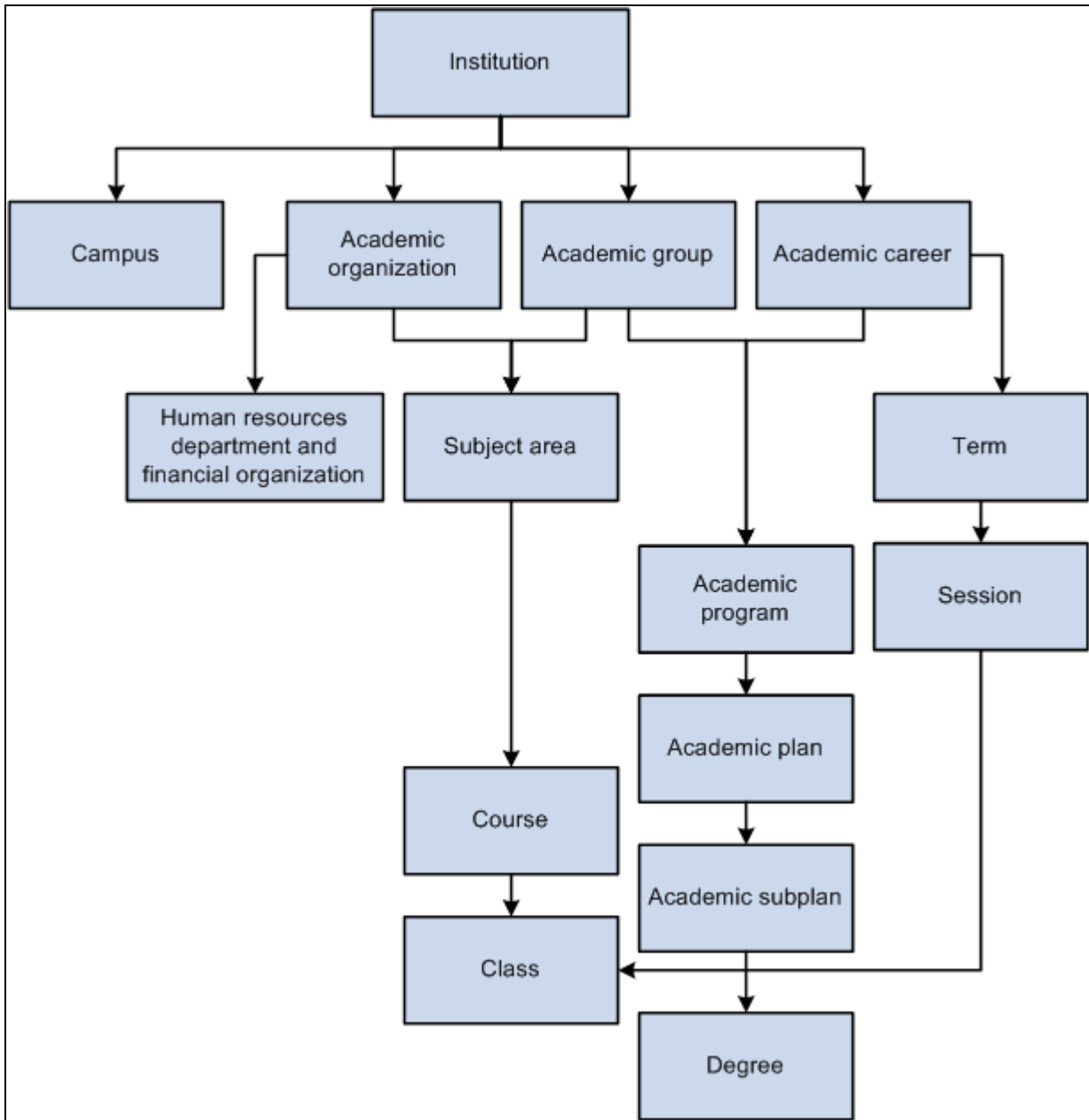
This chapter provides an overview of academic structure and discusses how to:

- Define academic institutions.
- Set up campuses.
- Define academic careers.
- Create career pointer exception rules.
- Define academic level and load rules.
- Define academic organizations.
- Define academic groups.
- Establish fields of study.
- Modify Classification of Instructional Programs (CIP) and Higher Education General Information Survey (HEGIS) codes.
- Define subject areas.
- (NLD) Define Dutch academic structure.

---

## Understanding Academic Structure

The academic structure and its elements are the building blocks for an academic institution. This diagram illustrates an institution's academic structure at a high level:



Viewing academic structure from an institutional perspective

An academic institution can have many campuses. Academic programs are part of academic careers and the academic institution. Subject areas are part of academic organizations and the academic institution. Academic plans and academic subplans are subdivisions of academic programs. Degree records are directly linked to academic plans. Courses and classes are subdivisions of subject areas and directly linked to terms and sessions.

## Defining Academic Institutions

To set up academic institutions, use the Academic Institution Table component (INSTITUTION\_TBL).



An academic institution is an entity, such as a university or college, that runs independently from other like entities and has its own set of rules and business processes. Typically, you define just one academic institution, but you can define as many as you need. Throughout Campus Solutions, you use academic institutions as a key value to group data into tables and to search those tables for data to extract.

This section lists prerequisites and discusses how to:

- Define the name and location of academic institutions.
- Set academic institution defaults and options.
- Set additional institution defaults and options.
- Activate instructor workload.
- Set repeat checking controls.
- (AUS, CAN, NZL, NLD) Activate other Student Administration features.
- Identify self-service report types.

## Prerequisites

You must decide whether you want a single- or a multi-institution structure. Set up separate academic institutions only if the entities function as distinctly separate schools. Each academic institution must have these characteristics:

- Separate schedule of classes.  
Course catalogs are shared among institutions.
- Independent statistics and transcripts.
- Students who do not normally enroll in classes from one academic institution while attending another academic institution.

For example, although you might have a law school that is a separate entity in many ways, the law students might sometimes enroll in graduate courses as part of their law careers.

Also, before establishing academic institutions, define these items:

- SetIDs  
A setID is used throughout Campus Solutions as a substitute for an academic institution or a student financials business unit. Instead of keying a number of tables by academic institution or business unit, the tables are keyed by setID, which enables institutions to share common codes, structures, and facilities.
- Grading schemes  
Grading schemes are the rules that the academic institution uses for assigning and converting grades.
- Country codes  
Country codes enable you to define the address for the academic institution in the address format appropriate for the country in which the academic institution is located.

**See Also**

*PeopleSoft Student Financials 9.0 PeopleBook*, "Completing Student Financials General Setup," Understanding Business Units

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Designing Campus Community"

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Grading," Defining Grading Schemes

**Pages Used to Define Academic Institutions**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Academic Institution 1	INSTITUTION_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 1	Define the name and location of the academic institutions.
Academic Institution 2	INSTITUTION_TABLE1	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 2	Set academic institution defaults for transfer credit processing and for courses.
Academic Institution 3	INSTITUTION_TABLE3	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 3	Set additional academic institution defaults and options for attendance tracking, cohort reporting, National Student Clearinghouse (NSC) reporting, and interoperability for learning management systems (LMS).
Academic Institution 4	INSTITUTION_TABLE4	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 4	Activate the Instructor Workload feature and establish high-level limits, workload preferences, and default values for instructor workload at the institution.
Academic Institution 5	INSTITUTION_TABLE5	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 5	Set repeat checking controls for academic institutions. The academic institution level is the highest level of control for the automatic Repeat Rule Checking COBOL/SQL process (SRPCERPT).

Page Name	Definition Name	Navigation	Usage
Academic Institution 6	SSR_INST_FEATURES	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6	Set up student administrative functionality that can be selected or cleared, such as Canadian Reporting.
Academic Institution 7	SAA_INST_RPT_SETUP	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 7	Identify the advisement report types to be used in self service.

## Defining the Name and Location of Academic Institutions

Access the Academic Institution 1 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 1).

The screenshot displays the 'Academic Institution 1' page. At the top, there are four tabs: 'Academic Institution 1' (selected), 'Academic Institution 2', 'Academic Institution 3', and 'Academic Institution 4'. Below the tabs, the page title is 'Academic Institution: PSUNV PeopleSoft University'. A navigation bar includes 'Find | View All', 'First', '1 of 1', and 'Last'. The main form contains the following fields:

- \*Eff Date:** 01/01/1900
- \*Status:** Active
- Residency Required:**
- \*Description:** PeopleSoft University
- Short Desc:** PSU
- Formal Desc:** PeopleSoft University
- Country:** USA United States
- Address:** 4301 Hacienda Boulevard, Pleasanton, CA 94588. There is an [Edit Address](#) link next to the address.

Academic Institution 1 page

### Residency Required

Select to require residency data for students. Your selection appears in the Residency Required field on the Academic Program page for all academic programs within this academic institution. You can modify the selection for specific academic programs. When you attempt to activate a student into a term, the Term Activation SQR process (SRTRMAC) checks whether a student's academic program requires that the student have residency data in the system. If it does and the student does not have residency data in the system, the Term Activation process does not activate the student into the term. This inactivation subsequently blocks the student from class enrollment and tuition calculation.

**Country** Enter the country where this academic institution is located. Exit the field to populate the page with variable address fields. The address fields that appear depend on the country selected. Enter the primary location of this academic institution into the applicable fields.

**See Also**

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Personal Identification Data," Setting Up Residency Rules

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Personal Identification Data," Entering Residency Data

## Setting Academic Institution Defaults and Options

Access the Academic Institution 2 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 2).

The screenshot displays the 'Academic Institution 2' configuration page. At the top, there are tabs for 'Academic Institution 1', 'Academic Institution 2' (selected), 'Academic Institution 3', and 'Academic Institution 4'. Below the tabs, the institution name is 'PSUNV PeopleSoft University'. A navigation bar includes 'Find | View All' and 'First 1 of 1 Last'. The main configuration area includes:

- Effective Date:** 01/01/1900
- Status:** Active
- Transfer Grading Scheme:** UGD (Undergraduate Grading Scheme)
- Transfer Grading Basis:** GRD (Graded)
- \*School Grading Basis:** GRD (Graded)
- Use SR Class Schedule Facility Conflict Checking
- Print National ID on Enrl. Ver

**Course Defaults**

- Campus:** MAIN (Main Hacienda Campus)
- Student Specific Permissions
- Auto Enroll from Wait List

**Course Cancellation**

- Enrollment Action Reason:** CANC
- Drop Related Components When Canceling Enrollment Component Class
- Drop Related Components When Canceling Non-Enrollment Component Class

Academic Institution 2 page

<b>Transfer Grading Scheme</b>	Enter the default grading scheme that applies to courses that students transfer from external organizations to this academic institution. Your selection appears in the Grading Scheme field on the Organization Affiliation page, based on the academic institution that you enter on that page.
<b>Transfer Grading Basis</b>	Enter the default grading basis that applies to courses that students transfer from external organizations to this academic institution. Your selection appears in the Grading Basis field on the Organization Affiliation page, based on the academic institution that you enter on that page.
<b>School Grading Basis</b>	Currently not in use.
<b>Use SR Class Schedule Facility Conflict Checking</b>	<p>Select to indicate that the system uses internal facility conflict checking functionality for all campuses at this academic institution. The system checks for facility conflicts whenever a facility is booked for a class on the Meetings page or the Exam page of the schedule of classes components.</p> <p>The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process.</p> <hr/> <p><b>Note.</b> This check box has no relation to the Check for Facility Conflict check box on the Facility Table page, which controls whether you can schedule multiple events in the same facility.</p> <hr/>
<b>Print National ID on Enrl. Ver (print national ID on enrollment verification)</b>	Select to have the system display the student's national ID on the enrollment verification report. The system selects this check box by default.
 <b>Course Defaults</b>	
Use this group box to set default values for the course catalog and schedule of classes pages. These default values simplify data entry. You can override these default values for individual courses and classes.	
<b>Campus</b>	<p>Enter the default campus for all courses within this academic institution. The campus value appears by default in the course catalog and the schedule of classes.</p> <hr/> <p><b>Note.</b> If this academic institution generally offers the same courses at more than one campus, you should not enter a value for a default campus because courses defined for a particular campus can be scheduled only for that same campus.</p> <hr/>
<b>Student Specific Permissions</b>	Select to have all classes scheduled at this academic institution require that you generate permissions for students to enroll in classes. This check box value migrates to the Basic Data page of the Schedule New Course component, where it can be overridden. Student-specific permissions require that you generate permissions for individual students.

**Auto Enroll from Wait List** Select to have the system automatically enroll students from wait lists into classes whenever space becomes available in the classes and the wait list process is run. This check box value migrates to the Enrollment Control page of the Schedule New Course component, where it can be overridden.

### **Course Cancellation**

**Enrollment Action Reason** Enter the default enrollment action reason that the system posts to enrolled students' records whenever a class is canceled.

**Drop Related Components When Canceling Enrollment Component Class** This check box is selected by default. Clear this check box if you do not want to drop related components when you cancel the enrollment component of a multiple component class.

**Drop Related Components When Canceling Non-Enrollment Component Class** This check box is selected by default. Clear this check box if you do not want to drop related components when canceling a non-enrollment component of a multiple component class.

### **See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Preparing for the Course Catalog and Schedule of Classes," Defining Facilities and Rooms

## **Setting Additional Institution Defaults and Options**

Access the Academic Institution 3 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 3).

Academic Institution 1	Academic Institution 2	Academic Institution 3	Academic Institution 4
<b>Academic Institution:</b> PSUNV		PeopleSoft University	
		Find   View All First 1 of 1 Last	
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active
<b>Class Meeting Attendance Type:</b>	MTG	Class Meeting	
<b>Student Attribute for Cohort:</b>	CHRT	Student Cohort	
<b>NSC Options</b>			
<b>*AGD Rule:</b>	Use Expected Grad Term		
<b>Month Factor:</b>	12		
<b>FICE Code:</b>			
<b>LMS Options</b>			
<b>Provider for Authentication</b>			
<b>LMS Extract File Type:</b>			
<b>Phone Type:</b>			
<b>Address Usage:</b>			
<b>UserID Extract Option</b>	<input checked="" type="radio"/> EmplID <input type="radio"/> UserID		

Academic Institution 3 page

### Attendance and Cohort Defaults

#### Class Meeting Attendance Type

Enter the default attendance type that this academic institution uses for generating attendance rosters. The attendance type indicates the type of attendance roster, such as *Class Meeting*, *Conference*, *Field Trip*, *Instructor Consultation*, or *Study Group*.

When you generate attendance rosters, the system uses this default attendance type, along with the fields that you have selected for this attendance type, to create the requested attendance rosters. After you generate the attendance rosters, you can change the attendance type for individual class meetings.

When you define the possible attendance rosters and applicable fields for each course component (through the Components page of the Course Catalog component), define all possible scenarios. Defining all possible scenarios ensures proper attendance roster generation if you decide at a later date to modify the class meeting attendance type for this academic institution. This field is required for attendance roster batch generation.

**Student Attribute for Cohort** Enter a default student attribute for cohort. Student attributes (such as cohort) are attached to a student's program record on the Student Attributes page in the Student Program/Plan component. If a student has an attribute on the Student Attributes page equal to the one set here, the Consolidate Academic Statistics COBOL SQL process (SRPCCONP) writes this common student attribute to the student's consolidated academic statistics record, which you can then prompt against for reporting purposes. The Consolidate Academic Statistics process searches for only the student attribute that you specify here. If the process does not find this student attribute on the student's program record, then the process does not include a student attribute for cohort on the student's consolidated statistics record. If the process finds multiple occurrences of this student attribute on the student's program record, then it writes the one with the lowest primacy number to the student's consolidated statistics record.

### **NSC Options**

Use the NSC Options group box to define how the NSC Extract SQR process (SRNSLCEX) calculates a student's anticipated graduation date (AGD) and to define the default Federal Interagency Committee on Education (FICE) code that is in the NSC extract for this academic institution.

**AGD Rule**(anticipated graduation date rule)

Indicate how you want the NSC Extract process to determine a student's AGD. By reporting a student's AGD to the NSC, the NSC can provide this critical information to lending institutions so that they know when to begin collecting loans from students. Any modification to these translate values requires a substantial programming effort. Values are:

*Use Expected Grad Term:* Select to have the NSC Extract process use the end date of the term that a student is expected to graduate as the basis for a student's AGD. Define a student's expected graduation term on the Student Program page.

*Use Term End Date:* Select to have the NSC Extract process use the end date of the term that the institution is reporting to the NSC as the basis for a student's AGD.

**Month Factor**

Enter the number of months that you want the NSC Extract process to add to the date determined by the AGD rule when the process calculates a student's AGD. For example, use the term end date plus a month factor of 12 to report to the NSC that a student's anticipated graduation date is a year beyond the end date of the term that the institution reports to the NSC.

**FICE Code** (Federal Interagency Committee on Education code)

Enter the default FICE code that you want to appear in the NSC extract for this academic institution. This value appears on the NSC page, where you can override it for each branch code of an academic institution.

### **LMS Options**

Use the LMS Options group box to specify LMS file type default values and personal data extract parameters.



<b>Provider for Authentication</b>	If all or most of the classes are LMS classes requiring self-service user authentication, select a provider for authentication. The provider serves as a high-level default. When this field is blank on the Components page of the Course Catalog component, the value entered on the Institution page is provided by default from the schedule of classes if a class is scheduled. Providers are defined on the LMS Provider Setup page.
<b>LMS Extract File Type</b> (learning management systems extract file type)	Select an LMS file type of <i>Blackboard CourseInfo 4</i> , <i>WebCT API Input Format</i> , or <i>XML V1.01</i> that serves as a high-level default when all or most of the classes are LMS classes. When the field is blank on the Components page of the Course Catalog component, the value selected here appears on the schedule of classes if a class is scheduled. Any modification to these translate values requires a substantial programming effort.
<b>Phone Type and Address Usage</b>	Select a phone type and address usage to specify demographic information for the Person object. If you select the People option on the LMS Extract Output page, the values selected here determine which phone and address information is exported. Because phone numbers and addresses are stored as separate records in Campus Community, you may actually choose to retrieve an individual's work phone number and home address. Remember that if the phone type that you specify is not found for the individual, no phone number is extracted. This functionality is different from that of an address, where you can specify an address usage or preferred selection order that causes the first one found to be extracted. With a phone type, you can select only one choice; therefore, make it a target that is likely to be found for every person object in the extract process. You should select a voice line because the system automatically extracts fax lines in addition to whatever you select here.
<b>UserID Extract Option</b>	Identify whether the LMS extract should use the student or instructor's <i>EmplID</i> or <i>UserID</i> .

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Tracking Attendance"

*PeopleSoft Student Records 9.0 PeopleBook*, "Consolidating and Reporting Academic Statistics"

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Biographical Information"

**Activating Instructor Workload**

Access the Academic Institution 4 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 4).

Academic Institution 1		Academic Institution 2		Academic Institution 3		Academic Institution 4	
<b>Academic Institution:</b>		PSUNV	PeopleSoft University				
				Find   View All		First 1 of 1 Last	
<b>Effective Date:</b>	01/01/1900			<b>Status:</b>	Active		
<input checked="" type="checkbox"/> Calculate Workload							
		<b>Workload Hours</b>					
<b>Full-Time Warning Limit %:</b>	<input type="text" value="100.00"/>	<b>Course Component Workload Hrs%:</b>	<input type="text" value="100"/>				
<b>Part-Time Warning Limit %:</b>	<input type="text" value="50.00"/>	<b>Academic Progress Units %:</b>	<input type="text"/>				
<input checked="" type="checkbox"/> Use Term/Session Weeks in Calc							
<b>Default Values</b>							
<b>Full-Time Assigned FTE %:</b>	<input type="text" value="120.00"/>	<b>Assignment Type:</b>	<input type="text" value="LEC"/>	Lecture Assignment Type			
<b>Part-Time Assigned FTE %:</b>	<input type="text" value="60.00"/>	<b>Instructor Assignment Class:</b>	<input type="text" value="FULL"/>	Full-time			

Academic Institution 4 page

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Instructor Workload"

**Setting Repeat Checking Controls**

For information about the Academic Institution 5 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 5).

Refer to *PeopleSoft Student Records 9.0 PeopleBook*, Setting Up Repeat Checking, Setting Up Repeat Checking for Academic Institutions

**(AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features**

Access the Academic Institution 6 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6).

Academic Institution 4		Academic Institution 5		Academic Institution 6		Academic Institution 7	
Academic Institution:		PSUNV		PeopleSoft University			
				Find   View All		First 1 of 1 Last	
Effective Date:		01/01/1900		Status:		Active	
<b>Australia</b>							
<input type="checkbox"/> DEST, HECS, Centrelink, TAC							
<b>Canada</b>							
<input type="checkbox"/> Government Reporting							
<b>New Zealand</b>							
<input type="checkbox"/> Catalog, SDR, EFTS, StudyLink							
<input type="checkbox"/> NZQA							
<b>Netherlands</b>							
<input type="checkbox"/> Higher Education							
<input type="checkbox"/> Studielink Participant							
<b>United Kingdom</b>							
<input checked="" type="checkbox"/> HESA, UCAS							

Academic Institution 6 page

**Important!** To use country-specific functionality in the system, you must also activate the country's features on the Installation Student Administration setup page for setID-based functionality.

<b>Australia</b>	Select to enable Australian DEST, HECS, Centrelink, and TAC functionality.
<b>Canada</b>	Select to enable Canadian government reporting.
<b>New Zealand</b>	Select to enable New Zealand Catalog, SDR, EFTS, StudyLink, and NZQA functionality.
<b>Netherlands</b>	Select to enable Netherlands Higher Education functionality.
<b>Studielink Participant</b>	Select to activate all online Studielink behavior.
<b>United Kingdom</b>	Select to enable the United Kingdom specific fields in the system for an academic institution.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "(CAN) Setting Up Government Reporting"

*PeopleSoft Student Records 9.0 PeopleBook*, "(NLD) Managing Student Higher Education Information"

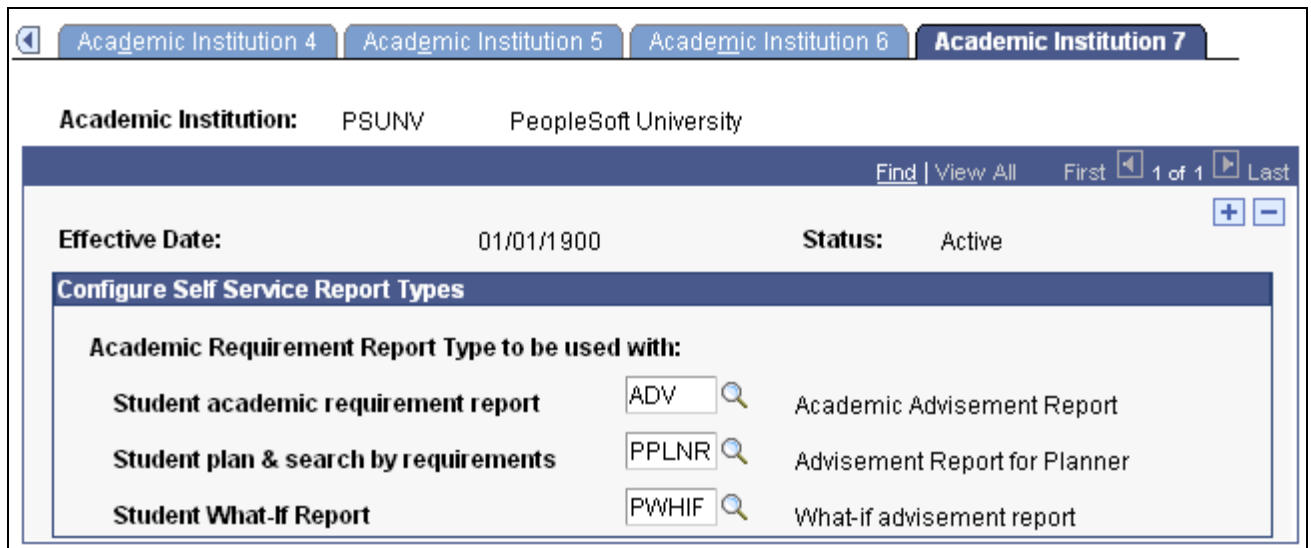
Chapter 11, "(AUS) Setting Up Government Reporting," page 235

*PeopleSoft Student Records 9.0 PeopleBook*, "(NZL) Setting Up Government Reporting"

Chapter 4, "Reviewing Installation Setup and System Defaults," Selecting Country-Specific Features and Enabling CRM for Higher Education Feature, page 65

**Identifying Self-Service Report Types**

Access the Academic Institution 7 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 7).



Academic Institution 7 page

**Configure Self Service Report Types**

**Student academic requirement report**

Enter the type of report to be used in the My Academic Requirements feature. This field prompts on advisement report types that do not have the Include What-If Information or Include Planned Courses check boxes selected.

**Student plan & search by requirements**

Enter the type of report to be used on the My Planner and Search by My Requirements features. This field prompts on advisement report types that have the Include Planned Courses check box selected.

**Student What-If Report**

Enter the type of report to be used on the What-If Report. This field prompts on any advisement report type that has the Include What-If Information check box selected.

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## Setting Up Campuses

To set up campuses, use the Campus Table component (CAMPUS\_TABLE).

A campus is an entity, usually associated with a separate physical administrative unit, that belongs to a single academic institution, uses the same course catalog, and produces a common transcript for students within the same academic career. The PeopleSoft Campus Solution system enables you to define as many campuses within an academic institution as necessary to meet your business needs.

This section lists prerequisites and discusses how to define campuses.

### Prerequisites

Before you establish campuses, define these items:

- Establishment IDs.
  - In Human Resources, you use the Location Table component to define work locations, but you also use the Location Table component to define general campus locations within Campus Solutions.

These campus locations are synonymous with central locations or addresses for the various campuses that comprise a college or university. If you have one main campus, you probably have a single location. However, if you offer classes at satellite locations or if you have geographically separate entities that make up the institution, you must define multiple locations.

- To add locations in Campus Solutions, you must create at least one establishment value.

If you are implementing or have implemented Human Resources, these establishment values should already be defined by the human resources department.

- Locations.

You define the physical locations of the campuses at the institution on the Location Table page. Each location requires an establishment ID.

### Page Used to Set Up Campuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Campus Table	CAMPUS_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Campus Table	Define each campus that constitutes an academic institution and indicate which locations are valid for a particular campus.

## Defining Campuses

Access the Campus Table page (Set Up SACR, Foundation Tables, Academic Structure, Campus Table).

**Campus Table**

**Academic Institution:** PSUNV PeopleSoft University  
**Campus:** MAIN

Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Status: Active  
 \*Description: Main Hacienda Campus  
 \*Short Description: Main  
 \*Location Code: PSCSHCDA Description: Hacienda  
 Use SR Class Schedule Facility Conflict Checking

**Valid Campus Locations** Find First 1-2 of 2 Last

*Location Code		
PSCSHCDA	Hacienda	
PSCRSWD	Rosewood Building Cluster	

Campus Table page

### Use SR Class Schedule Facility Conflict Checking

Select to enable the system to use internal facility conflict checking functionality for this campus. The system checks for facility conflicts whenever a facility is booked for a class on the Meetings page or the Exam page of the schedule of classes.

The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process.

---

**Note.** This check box has no relation to the Check for Facility Conflict check box on the Facility Table page, which controls whether you can schedule multiple events at the same facility.

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### Valid Campus Locations

#### Location Code (upper)

Enter a location code for the primary location of the campus. Define locations on the Location Table page in Human Resources.

#### Location Code (lower)

Enter all valid location codes for this campus. When creating courses or scheduling classes at a particular campus, the system displays only the values that you list here.

## See Also

*PeopleSoft Student Records 9.0 PeopleBook*, "Preparing for the Course Catalog and Schedule of Classes," Defining Facilities and Rooms

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Designing Campus Community," Setting Up Campus Community and PeopleSoft HRMS Shared Elements

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## Defining Academic Careers

To set up academic careers, use the Academic Career Table component (ACAD\_CAREER\_TBL).

This section provides an overview of academic careers and discusses how to:

- Describe academic career parameters.
- Set additional academic career parameters.
- Set up academic career pointers.
- Set repeat checking controls for academic careers.
- Set up self-service options.

## Understanding Academic Careers

Academic career is a concept used in Campus Solutions to designate all course work undertaken by a student at an academic institution; you group this course work in a single student record. For example, a university that has an undergraduate school, a graduate school, and several professional schools can define an undergraduate career, graduate career, and a separate career for each professional school (for example, law, medical or dental). You might also make extended education or continuing education its own academic career, or make separate academic careers for every school or college at the undergraduate level.

Academic careers have these common characteristics:

- All credit is granted under a common unit type, such as semester hours or quarter hours.
- A single repeat scheme is used.

Use the Academic Career component to create and define academic careers and all the parameters of each academic career. Academic career Values are: delivered with the system as translate values. If, when you are establishing academic careers, you find that you must define more academic career values, add the new values to the translate table for academic careers. The translate table for academic careers is in the ACAD\_CAREER field in PeopleSoft Application Designer.

## Pages Used to Define Academic Careers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Career Table	ACAD_CAREER_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Table	Describe academic careers and set parameters, such as grading scheme, for each academic career.
Academic Career Table 2	ACAD_CAREER_TBL2	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Table 2	Set additional academic career parameters, such as default term unit types.
Academic Career Pointers	ACAD_CAR_PTRS	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Pointers	Set up academic career pointers, which specify whether a student within an academic career can enroll in courses from another academic career at a particular academic institution.
Repeat Checking	ACAD_CAR_RPT_CHK	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Repeat Checking	Set repeat checking controls at the academic career level. Also, link repeat rules to academic careers.
Self Service Options	SSR_ACDCAR_SELF SRV	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Self Service Options	Indicate if you want users to have the ability to select the students's academic program to be assigned to an enrollment record. Indicate how you want to enforce enrollment appointments for self-service enrollment within this academic career.

## Describing Academic Career Parameters

Access the Academic Career Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Table).



Academic Career Table		Academic Career Table 2	Academic Career Pointers	Repeat Checking	Self Service Options						
Academic Institution:	PSUNV	PeopleSoft University									
Academic Career:	UGRD										
Find   View All    First 1 of 1 Last											
*Effective Date:	01/01/1900	*Status:	Active								
*Description:	Undergraduate										
Short Description:	Undergrad										
Academic Plan Type:	Major										
*Grading Scheme:	UGD	Undergraduate Grading Scheme									
Default for Term Activation:	Term Begin Date										
Last Term for Hist Enrl Data:	0350	1999 Spring									
Transfer Credit Defaults											
*Grading Basis:	GRD	Graded									
*Transfer Grade:	T	Transfer									
Transcript Level	Print on Unofficial				<table border="1"> <thead> <tr> <th colspan="2">Manual Course Unit Default</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/></td> <td>From Incoming Course</td> </tr> <tr> <td><input type="radio"/></td> <td>From Course Catalog</td> </tr> </tbody> </table>	Manual Course Unit Default		<input checked="" type="radio"/>	From Incoming Course	<input type="radio"/>	From Course Catalog
Manual Course Unit Default											
<input checked="" type="radio"/>	From Incoming Course										
<input type="radio"/>	From Course Catalog										

Academic Career Table page

### Academic Plan Type

Select an academic plan type to indicate the highest level academic plan that is valid within this academic career—for example, *Major*, *Minor*, or *Concentration*. You can modify these translate values.

No programming is associated with this field, but the institution can define restrictions based on this value. For example, if this value is set to *Major* for the undergraduate career, then students in that academic career could take academic plans involving majors, minors, and concentrations. But if this value is set to *Concentration* for the continuing education career, then the institution could create restrictions so that students in that academic career could not declare a major.

### Grading Scheme

Enter the grading scheme for this academic career. This grading scheme defines the valid grading bases for this academic career. The system displays this grading scheme by default on the Program 1 page for academic programs within this academic career. You can override the default grading scheme for each academic program. Define grading scheme values on the Grading Scheme Table page.

### GB Default for Transfer Credit (grading basis default for transfer credit)

Enter the default grading basis for credit transferred to this academic career. This grading basis appears by default on the Program 1 page, where you can override the value for academic programs within this academic career.

### Default Grade- Transfer Credit

Enter the default grade for credit transferred to this academic career. This grade appears by default on the Program 1 page, where you can override the value for academic programs within this academic career.

**Default for Term Activation** Select either *Term Begin Date* or *Term End Date*. The value you select here determines the default value that appears on the Term Table page. The date specified determines the last date for which a student can be term activated.

**Last Term for Hist Enrl Data** (last term for historical enrollment data) Enter the last term for historical enrollment data. The system uses this value in conjunction with the values entered for a student on the Historical Course Enrollment page to determine which historical enrollment information is printed on a student's transcript. This field restricts historical enrollment data to terms less than or equal to the value that you specify. Therefore, set this field value to the latest term possible for historical enrollment records. You can include historical enrollment on transcripts by Entering the corresponding option on the Enrollment/Statistics page of the Transcript Type component.

---

**Warning!** The system populates the Last Term for Hist Enrl Data field with *0000*. However, term *0000* does not allow historical enrollment data to appear on a transcript. If you want historical enrollment data to appear on a student's transcript, you must Enter another term value.

---

### Transcript Level

The default is *Print on Unofficial*.

The transcript level determines which transcript level is defaulted to the following transfer credit pages: Course Credits – Automated, Course Credits – Manual, Test Credits – Automated, Test Credits – Manual, and Other Credit – Manual.

### Manual Course Unit Default

#### From Incoming Course

Select this option to populate the Units Transferred field in the Equivalent Course group box on the Transfer Course Entry page with the value from the Units Taken field in the Incoming Course group box for the course that has the same group and sequence number.

#### From Course Catalog

Select this option to populate the Units Transferred field in the Equivalent Course group box on the Transfer Course Entry page with the value from the Maximum Units field in the Course Catalog (CRSE\_CATALOG) component.

Regardless of the option that you select in the Manual Course Unit Default group box, you can override the default value on the Transfer Course Entry page, to transfer a different number of units.

**See Also**

*PeopleSoft Student Financials 9.0 PeopleBook*, "Getting Started with PeopleSoft Student Financials"

[Chapter 3, "Preparing for Data Conversion," page 37](#)

[Chapter 9, "Defining Dynamic Academic Calendars," page 175](#)

*PeopleSoft Student Records 9.0 PeopleBook*, "Using Enrollment-Related Processes," Creating Historical Enrollment Records

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Transcripts," Designating Enrollment and Statistics Data

**Setting Additional Academic Career Parameters**

Access the Academic Career Table 2 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Table 2).

Academic Career Table 2		Academic Career Pointers	Repeat Checking	Self Service Options
<b>Academic Institution:</b>	PSNZL	Silver Fern University		
<b>Academic Career:</b>	UGRD	Undergraduate		
		Find	View All	First 1 of 1 Last
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active	
<b>*Term Unit Type:</b>	S	Semester Hours		
<b>Primacy Nbr:</b>				
<b>Holiday Schedule:</b>	KZNZL	NZL - New Zealand Holidays		
	<input checked="" type="checkbox"/>	<b>Enroll into Course Milestones</b>		
	<input type="checkbox"/>	<b>Graduate Level Indicator</b>		
	<input type="checkbox"/>	<b>Use Dynamic Class Dates</b>		
<b>Dynamic Class Date Rule:</b>				
	<input checked="" type="checkbox"/>	<b>Allow OEE Enrollment</b>		
<b>OEE Dynamic Date Rule:</b>				
<b>*AA Oprid Display Option</b>	Display Operator			
<b>Edit Advisor Against</b>				
<input checked="" type="radio"/> <b>Personal Data</b>		<input type="radio"/> <b>Instructor Advisor</b>		<input type="radio"/> <b>Advisor Role</b>

Academic Career Table 2 page

<b>Term Unit Type</b>	Enter a term unit type to indicate what kind of units are calculated for this academic career. Values for this field are delivered with the system as translate values. These translate values can be modified.
	<b>Note.</b> When processing transfer credit between academic careers with different term unit types, use the Unit Conversion Table page first to set up unit conversion rules.
<b>Primacy Nbr</b> (primacy number)	Enter the primacy number for this academic career. The system uses this number to determine a student's primary academic career when you consolidate academic statistics. The system also uses this number to prioritize financial aid applications when students are enrolled in multiple academic careers at the same time. The lowest number takes precedence.
	<b>Note.</b> Coordinate the numbering with financial aid to avoid conflicts.
<b>Holiday Schedule</b>	Enter the holiday schedule for this academic career. The holiday schedule prevents scheduling classes for this academic career on designated holidays.  Campus Solutions and Human Resources share the same holiday schedule. Each division of the institution probably has entries on the calendar because the information contained on the calendar is used for different purposes. Calendars are used to schedule classes and events.
<b>(NZL) Enroll Into Course Milestones</b>	Select to enable the tracking of NQF (national qualifications framework) Unit Standards for a specific career.
<b>Graduate Level Indicator</b>	Select to indicate that this academic career qualifies as graduate level for tax reporting purposes. You can then include this field in the NSC reporting process (by using the NSC Report page) to indicate on the NSC Extract report whether a student was enrolled at the graduate level during a reporting period or term. Otherwise, this field is informational only, and the institution can use it for various reporting purposes.
	<b>Note.</b> The NSC offers an optional service to institutions to assist them in fulfilling the reporting guidelines of the Taxpayer Relief Act of 1997. NSC member schools that choose to use this service are required to add a graduate level indicator to their reports and, therefore, should enter this option and enter the corresponding option on the NSC Report page.
<b>Use Dynamic Class Dates</b>	Select to make available the Dynamic Date page of the Academic Program Table component. You use the Dynamic Date page to set up reasons and penalties for canceling, withdrawing from, and dropping classes. These reasons and penalties relate to the corresponding landmark date deadlines on the dynamically calculated academic calendars, and they apply to students according to their academic program.

<b>Dynamic Class Date Rule</b>	Enter a dynamic date rule to have the system assign that rule to all course offerings that you tie to this academic career. You can override this default rule on an offering-by-offering basis through the Offerings page. This field prompts you with only the dynamic class date rules that have <i>not</i> been designated for open entry/exit (OEE) enrollment on the Dynamic Class Dates page.
<b>Allow OEE Enrollment</b> (allow open entry/exit enrollment)	Select to have all course offerings that you tie to this academic career permit, by default, the scheduling of OEE class sections. You can override this default on an offering-by-offering basis on the Offerings page of the Course Catalog component. If you select this check box, the OEE Dynamic Date Rule field becomes available.
<b>OEE Dynamic Date Rule</b> (open entry/exit dynamic date rule)	An OEE dynamic date rule is a <i>dynamic class date rule</i> that has been designated for OEE enrollment. The enrollment engine uses the OEE dynamic date rule to calculate significant class dates for a student whenever a student enrolls in an OEE class. This field is available for edit only if you select the Allow OEE Enrollment check box on the preceding page of this component. Select an OEE dynamic date rule to have the system assign that rule to all course offerings that you tie to this academic career. You can override this default rule on an offering-by-offering basis through the Offerings page of the Course Catalog component. This field prompts you with only the dynamic class date rules that have been designated for OEE enrollment on the Dynamic Class Dates page.
<b>AA Oprid Display Option</b> (academic advisement operator identification display option)	<p>Select an available option to display or hide the operator ID, operator name, or Operator field on the advisement report. The default value is <i>Display Operator</i>.</p> <p><i>Display Name:</i> If you select this option, the system displays the operator's name on the advisement report.</p> <p><i>Display Operator:</i> If you select this option, the system displays the operator's ID on the advisement report.</p> <p><i>Do Not Display:</i> If you select this option, the system does not display the Operator field on the advisement report.</p>
<b>Edit Advisor Against</b>	<p>Indicate which view the system should use when prompting you to assign an advisor for a student in this academic career. You assign advisors to students on the Student Advisor page. Your selection here appears on the Academic Program page. Select from these options:</p> <p><i>Personal Data:</i> Prompts against all people with a PERSONAL_DATA record in the PeopleSoft system.</p> <p><i>Instructor Advisor:</i> Prompts against all people defined as instructors and advisors on the Instructor/Advisor Table page, as defined for this academic career.</p> <p><i>Advisor Role:</i> Prompts against all people defined as advisors on the Instructor/Advisor Table page, as defined for this academic career.</p>

**See Also**

Chapter 9, "Defining Dynamic Academic Calendars," page 175

*PeopleSoft Student Records 9.0 PeopleBook*, "Preparing for the Course Catalog and Schedule of Classes"

*PeopleSoft Student Records 9.0 PeopleBook*, "Consolidating and Reporting Academic Statistics"

PeopleSoft Human Resources Management System documentation

## Setting Up Academic Career Pointers

Access the Academic Career Pointers page (Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Pointers).

The screenshot displays the 'Academic Career Pointers' page. At the top, there are navigation tabs: 'Academic Career Table', 'Academic Career Table 2', 'Academic Career Pointers' (selected), and 'Repeat Checking'. Below the tabs, the 'Academic Institution' is set to 'PSUNV' (PeopleSoft University) and the 'Academic Career' is 'CNED' (Continuing Education). The 'Effective Date' is '01/01/1900'. The '\*Course Career' field contains 'UGRD' (Undergraduate) with a search icon. The '\*Allow Enrollment' field is a dropdown menu set to 'Yes', with '+' and '-' buttons to its right. Navigation controls include 'Find | View All', 'First', '1 of 1', and 'Last'.

Academic Career Pointers page

On the Career Pointer Exception page, you can set specific exceptions to the academic career pointers on the Academic Career Pointers page. For example, you might want to set the academic career pointers for the undergraduate career so that undergraduate students can, with permission, enroll in graduate, graduate business, and law courses; can always enroll in undergraduate and continuing education courses; and can never enroll in courses from any other academic career.

---

**Note.** Enter values for all possible academic careers, including the ones in which the student cannot enroll in courses. Although the system permits you to omit academic careers in which the student cannot enroll, this practice is not recommended.

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- Course Career**                      Enter each academic career that you have defined for a particular academic institution.
  
- Allow Enrollment**              Enter whether a student can enroll in an academic career. Allow Enrollment Values are: translate values. Values are: *Yes*, *No*, and *Permission*. Selecting *Permission* requires the student to have a general permission or a student-specific permission at enrollment time.

## Setting Repeat Checking Controls for Academic Careers

Access the Repeat Checking page (Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Repeat Checking).

Academic Career Table	Academic Career Table 2	Academic Career Pointers	Repeat Checking
<b>Academic Institution:</b>	PSUNV	PeopleSoft University	
<b>Academic Career:</b>	CNED	Continuing Education	
			Find   View All   First 1 of 1 Last
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active
<b>Repeat Check</b>			
<b>Scheme:</b>	UGRD		Undergraduate
<b>Repeat Rule:</b>			
<b>*Process on Enrollment:</b>	No	<input type="checkbox"/>	Temporarily Suspend Repeat Check on Enrollment
<b>*Repeat Grade Check:</b>	Never	<input type="checkbox"/>	Temporarily Suspend Repeat Check on Grade Input
<b>Course Catalog Repeats</b>			
<b>*Course Catalog Repeat Message:</b>	Warning		

Repeat Checking page

### See Also

*PeopleSoft Student Records 9.0 PeopleBook, "Setting Up Repeat Checking"*

## Setting Up Self-Service Options

Access the Self Service Options page (Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Self Service Options).

Academic Career Table 2		Academic Career Pointers		Repeat Checking		<b>Self Service Options</b>	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University					
<b>Academic Career:</b>	CNED	Continuing Education					
<b>Self Service Options</b>		Find   View All		First		1 of 1	
<b>Effective Date:</b>		01/01/1900		<b>Status:</b>		Active	
<b>Self Service Academic Program</b>							
<input type="checkbox"/> <b>Allow Student to Select</b>							
<b>Self Service Enrl Appt Edit</b>							
<input type="radio"/> <b>Enrollment Engine Only</b>				<input checked="" type="radio"/> <b>Online and Engine</b>			

Self Service Options page

**Self Service Academic Program**

**Allow Student to Select**

This check box works in combination with the Select Acad Prog During Enroll (select academic program during enrollment) check box on the Academic Institution 5 page to control whether a student who is active in more than one academic program can assign a program to a class when the student enrolls in or swaps to that class.

When you select the Select Acad Prog During Enroll check box on the Academic Institution 5 page, the Academic Program prompt becomes available for administrative users on the Quick Enroll page and Enrollment Request page when a student has two or more active academic programs.

To allow students to select a program in Self Service, you must *also* select the Allow Student to Select check box here on the Self Service Options page *as well as* the Select Acad Prog During Enroll check box.

For information about the Academic Institution 5 page:

See *PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Repeat Checking," Setting Up Repeat Checking for Academic Careers.

**Self Service Enrl Appt Edit**

**Enrollment Engine Only**

Select this option to have the enrollment engine enforce enrollment appointments in self-service enrollment only when a student submits an enrollment request with an action of enroll or swap for processing by the enrollment engine.



**Online and Engine**

Select this option to have the system validate enrollment appointments in self-service enrollment when a student selects a term on the Select Enrollment Term Search page, and when the student enters or selects a class number on the Add Classes, Drop/Update Class, or Swap Classes pages. If the student does not have a valid enrollment appointment or if the open enrollment period for the session that the student is trying to enroll in has not yet begun, these edits prevent the student from submitting enrollment requests. When a qualifying student does submit an enrollment request with an action of enroll or swap, the enrollment engine still enforces enrollment appointments during processing. The system selects this option by default.

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**Note.** Modification of these translate values requires significant programming effort.

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## Creating Career Pointer Exception Rules

To set up career pointer exception rules, use the Career Pointer Exception Rule component (CAR\_PTR\_EXCEPTIONS).

This section provides an overview of career pointer exception rules and discusses how to define career pointer exception rules.

## Understanding Career Pointer Exception Rules

Career pointer exception rules enable you to define exceptions to the regular academic career pointer guidelines from the Academic Career Pointers page. When students in academic programs with career pointer exception rules attempt to enroll in courses, the enrollment engine looks at the career pointer exception rule as defined on the Career Pointer Exception Rule page before proceeding to the academic career pointers as defined on the Academic Career Pointers page.

You can create career pointer exception rules to define the academic groups, subject areas, and catalog numbers into which a student can enroll. Then you can connect these career pointer exception rules to academic programs as necessary. Career pointer exception rules are connected to academic programs with the Career Pointer Exception Rule field on the Academic Program page. If that field is empty, the enrollment engine checks only the academic career pointer guidelines.

This list summarizes the system checks that occur during enrollment engine processing:

1. The enrollment engine checks the academic group, subject area, and catalog number of the requested course against the values entered on the Career Pointer Exception Rule page.

The enrollment engine verifies that the catalog number of the requested course is less than or equal to the maximum catalog number for that academic group and subject area combination. If the enrollment engine finds no match, the check proceeds to the next step.

2. The enrollment engine checks the academic group and subject area of the requested course plus a catalog number with a value of null against the values entered on the Career Pointer Exception Rule page.

The enrollment engine verifies that the catalog numbers for that entire academic group and subject area combination have not been restricted. If the enrollment engine finds no match, the check proceeds to the next step.

3. The enrollment engine checks the academic group of the requested course, a subject area with a value of null, and the catalog number of the requested course against the values entered on the Career Pointer Exception Rule page.

The enrollment engine verifies that the catalog number of the requested course is less than or equal to the maximum allowable catalog number of that academic group. If the enrollment engine finds no match, the check proceeds to the last step.

4. The enrollment engine checks the academic group of the requested course, subject area with a value of null, and a catalog number with a value of null against the values entered on the Career Pointer Exception Rule page.

The enrollment engine verifies that all subject areas and catalog numbers for the entire academic group have not been restricted. If the enrollment engine finds no match, it uses the enrollment request for the academic career pointers as defined on the Academic Career Pointers page.

This series of checks assures that the student, according to her or his academic career, is permitted to enroll in the requested course.

## Page Used to Create Career Pointer Exception Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Career Pointer Exception Rule	CAR_PTR_EXCEPTIONS	Set Up SACR, Foundation Tables Academic Structure, Career Pointer Exception Rule, Career Pointer Exception Rule	Define all possible career pointer exception rules—the exceptions to the academic career pointer guidelines established on the Academic Career Pointers page. After you define the career pointer exception rules, the institution can attach them to academic programs to ensure that students within an academic program can enroll only in permissible courses.

## Defining Career Pointer Exception Rules




Access the Career Pointer Exception Rule page (Set Up SACR, Foundation Tables Academic Structure, Career Pointer Exception Rule, Career Pointer Exception Rule).

### Career Pointer Exception Rule

**Academic Institution:** PSUNV      PeopleSoft University

**Career Pointer Exception Rule:** LBART-2
















































Find | View All      First 1 of 1 Last

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

**\*Description:** Exceptions for LBART (set 2)

**\*Short Description:** LBART-2

**Course Requested** Find      First 1-8 of 8 Last

*Academic Group	Subject Area	Catalog Nbr	*Allow Enrollment	Grading Basis Mapping Rule	
CNTED 	<input type="text"/> 	<input type="text"/>	Permission 	UGRAD 	 
FA 	<input type="text"/> 	125	Yes 	<input type="text"/> 	 
FA 	<input type="text"/> 	130	Permission 	<input type="text"/> 	 
FA 	<input type="text"/> 	510	Permission 	UGRAD 	 
FA 	<input type="text"/> 	585	Yes 	UGRAD 	 
LBART 	ENGLIT 	540	Yes 	UGRAD 	 
LBART 	ENGLIT 	600	Permission 	UGRAD 	 
LBART 	MATH 	<input type="text"/>	No 	<input type="text"/>	 

Career Pointer Exception Rule page

**Academic Group**      Enter the academic group in which a student can request a course.

**Subject Area**      Enter the subject area within the academic group in which a student can request a course. To indicate all subject areas, leave this field blank. Otherwise, insert rows to specify each subject area within the academic group for which you want to create a rule.

**Catalog Nbr (catalog number)**      Enter the maximum catalog number within the subject area or academic group in which a student can request a course. To indicate all catalog numbers within a subject area or academic group, leave this field blank.

**Allow Enrollment**      Enter whether a student is permitted enrollment in courses that match the criteria specified in the previous fields. Allow Enrollment Values are: delivered with the system as translate values. Values are: *Yes*, *No*, and *Permission*. Entering *Permission* requires the student to have a general permission or a student-specific permission at enrollment time.

**Grading Basis Mapping Rule**      Enter the grading basis mapping rule for the requested courses. Define grading basis mapping rule values on the Grading Basis Exception Rule page. The system uses the grading basis mapping rule to translate grades earned in another academic group to valid grades within a student's academic career.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Managing the Schedule of Classes," Understanding Class Permissions

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Grading," Defining Grading Basis Exception Rules

## Defining Academic Level and Load Rules

To set up academic level and load rules, use the Level/Load Rules Table component (LVL\_ST\_RULE\_TBL).

Use the Level/Load Rules component to define academic level and academic load rules for every academic career at your institution. Various system processes use these rules to determine a student's academic level and academic load—processes such as class enrollment, financial aid reporting, and the consolidation of academic statistics.

This section discusses how to:

- Define academic level and load determination values.
- Define level rules.
- (AUS) Define level dependent load rules.
- Define load rules.
- Define contiguous term load rules.

**See Also**

*PeopleSoft Financial Aid 9.0 PeopleBook*, "Managing Financial Aid Terms"

*PeopleSoft Student Records 9.0 PeopleBook*, "Consolidating and Reporting Academic Statistics"

## Pages Used to Define Academic Level and Load Rules

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Level/Load Rules Table	LVL_ST_RULE_TBL	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Level/Load Rules Table	For each academic level rule, specify how the system processes must determine a student's academic level and academic load, and define how the Consolidate Academic Statistics process must map academic levels to Integrated Postsecondary Education Data System (IPEDS) academic levels.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Academic Level Table	ACAD_LEVEL_TBL	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Academic Level Table	Associate academic levels with cumulative units or terms to link the academic levels to the corresponding National Student Loan Data System (NSLDS) loan years, and to link academic levels with federal direct lending years.
Level Dependent Load Rules	SSR_LVL_LOAD_AUS	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Level Dependent Load Rules	Define values used for Australian EFTSL (equivalent full-time student load) and HECS (Higher Education Contribution Scheme) calculations. Page functionality is similar to the Academic Load Table page.
Academic Load Table	ACAD_LOAD_TBL	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Academic Load Table	Define academic load rules, financial aid load rules, and NSC academic load rules.
Statistics Period Load	ACAD_LOAD2_TBL	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Statistics Period Load	For contiguous terms, define the academic load rules, NSC academic load rules, and financial aid load rules. Contiguous terms are consecutive terms in which you combine academic load information.

## Defining Academic Level and Load Determination Values

Access the Level/Load Rules Table page (Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Level/Load Rules Table).

Level/Load Rules Table		Academic Level Table		Academic Load Table		Statistics Period Load	
<b>SetID:</b>	PSUNV						
<b>Academic Level Rule:</b>	UGRD						
Find   View All    First ◀ 1 of 1 ▶ Last							
<b>*Effective Date:</b>	<input type="text" value="01/01/1900"/>	<b>*Status:</b>	<input type="text" value="Active"/>				
<b>*Description:</b>	<input type="text" value="Undergraduate"/>						
<b>*Short Description:</b>	<input type="text" value="Undergrad"/>						
<b>*Level Determination:</b>	<input type="text" value="Base On Units"/>	<b>Default Academic Level:</b>	<input type="text"/>				
<b>*Load Determination:</b>	<input type="text" value="Base On Units"/>	<b>Default Academic Load:</b>	<input type="text"/>				
<b>First Time Mapping for IPEDS</b>							
<b>Academic Level:</b>	<input type="text" value="Freshman"/>						
<b>Maps to IPEDS Academic Level:</b>	<input type="text" value="First Time Freshman"/>						

Level/Load Rules Table page

**Status**

Select a status for this academic level rule. Enter *Active* when adding a new academic level rule. Select *Inactive* only if your institution no longer uses this academic level rule.

**Description and Short Description**

Enter a description and short description for the academic level rule.

## Level Determination

Select how the academic level is determined for a student's STDNT\_CAR\_TERM record during term activation (in the background or online). Levels can be calculated in one of four ways:

*Base on Units:* Select to have the system assign an academic level based on the student's cumulative units (those designated as earned credit). The system includes articulated transfer units in this count.

*Default:* Select to have the system assign an academic level for each term based on the previous STDNT\_CAR\_TERM record academic level. If you enter this value, the system requires you to enter a value in the Default Academic Level field.

*Manually Input:* Select to manually assign an academic level for each student and each term on the Term Activation page. After you manually assign an academic level for the student's initial term activation record, the original value automatically copies forward (and never increments) during all future online or batch term activation processes. For some programs, you may want this behavior (for example, you may always want to assign the *Graduate* academic level to graduate students, regardless of their progress). For other programs, you may want to initially assign the value manually and update it manually each term.

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**Warning!** If you select *Manually Input*, you must assign an academic level on the Term Activation page. Although students in programs assigned to a manual level and load rule can be included in the batch process (depending on the selection criteria used), the process assigns a system-generated level value of *NST*.

---

*Term Progression:* Select to have the system assign an academic level based on the student's cumulative terms. The system counts all terms that have a STDNT\_CAR\_TERM record. The system includes transfer terms that have term activation records in this count.

## Default Academic Level

This field is required if you selected *Default* in the Level Determination field. The system assigns this default value to the STDNT\_CAR\_TERM record during term activation in the event that no prior STDNT\_CAR\_TERM record exists from which the system can copy the academic level. Values for this field are delivered with your system as translate values. You can modify these values.

## Load Determination

Select how the system calculates academic load. Academic load can be entered manually for a student on the Term Activation page. Select one of the following values:

*Base on Units:* Select to have the system assign an academic load based on the student's cumulative units (those designated as earned credit). The system includes articulated transfer units in this count.

If you select this value, the Academic Load Table page becomes active and you can indicate which terms should be included in the annual load calculation.

(AUS) You can select this value for HECS calculations.

*Default:* Select to have the system assign an academic load for each term based on the previous STDNT\_CAR\_TERM record academic load. If you select *Default*, the system requires you to enter a value in the Default Academic Load field.

*Manually Input:* Select to manually assign an academic load for each student and each term on the Term Activation page.

(AUS) *Units By Level:* This value is assigned for academic level rules that use the HECS feature. Select this value to enable the Level Dependent Load Rules page, which you can use instead of the Academic Load Table page to calculate a student's HECS Load factor.

## Default Academic Load

This field is required if you selected *Default* in the Load Determination field. The system assigns this default value to the STDNT\_CAR\_TERM record during term activation in the event that no STDNT\_CAR\_TERM record exists from which the system can copy the academic load. Values for this field are delivered with your system as translate values. You can modify these values.

When you run the Consolidate Academic Statistics process for an academic statistics period for which you have set the Academic Load Rule field on the Academic Statistics Period page to *Term Load Rule Applies* and you have set the Load Determination field on this page to *Base on Units*, the process uses the academic load rules from the Academic Level Table page to determine a student's academic load, NSC academic load, and financial aid load. If you have set the Load Determination field on this page to *Manually Input* or *Default*, the Consolidate Academic Statistics process uses the student's career-term record or the value in the Default Academic Load field to determine the student's academic load, regardless of the setting for the Academic Load Rule field on the Academic Statistics Period page.



### (AUS) EFTSL Values and HECS Load Factor

Tuition Calculation for HECS currently calculates the HECS Load Factor, which is generally equal to the EFTSL value for a class. However, HECS is not calculated for all enrolled students. For example, HECS is not calculated for full-fee paying overseas students. In some cases, the HECS Load Factor may be different from the EFTSL value for a class. An example is a student who may complete a work experience class that contributes units to his progression, but for which there are no HECS charges (as the class may not consume institution resources). In this case, the billing units for the class should be made zero, but Academic Progress Units should be given. The HECS Load Factor is a calculation based on billing units, and the EFTSL calculation is based on Academic Progress Units. In this case, the HECS Load Factor is zero, but the EFTSL still has a value. Since EFTSL is required for every student, the system calculates EFTSL as a separate process.

You must ensure that the load/level rules are set up to reflect the full-time load for different programs. For example, the full-time load/level rules for one program may include a summer term as full-time compulsory attendance, while other programs may consider the summer term as an additional term for students to undertake study above the ordinary full-time load. When setting up the level/load rules, you can indicate whether or not the term should be included in the annual load calculation. For example, if the summer term is not considered part of the full-time load and the student takes summer classes, the student's annual EFTSL will be greater than if the student enrolled in a full-time load only for the other terms in the academic year.

## Defining Level Rules

Access the Academic Level Table page (Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Academic Level Table).

Level/Load Rules Table	Academic Level Table	Academic Load Table	Statistics Period Load
<b>SetID:</b>	PSUNV		
<b>Academic Level Rule:</b>	UGRD	Undergraduate	
Find   View All First 1 of 1 Last			
<b>Effective Date:</b>	01/01/1900		<b>Status:</b> Active
Find First 1-4 of 4 Last			
Cum Units/Terms	*Academic Level	*NSLDS Loan Year	*Direct Lending Year
0.000	Freshman	1st Yr Prv	1st Yr,prv + -
30.000	Sophomore	2nd Year	2nd Yr + -
60.000	Junior	3rd Year	3rd Yr + -
90.000	Senior	4th Year	4th Year + -

Academic Level Table page

**Cum Units/Terms** (cumulative units or terms) Enter the minimum number of cumulative units or terms that the system requires before it assigns a student to a corresponding academic level. The system uses only these values if you select Units or Terms on the Level/Load Rules Table page.

- Academic Level** Enter an academic level for each increment of cumulative units or terms that you want to associate with this level and load rule. Values for this field are delivered with your system as translate values. You can modify these values.
  
- NSLDS Loan Year**(National Student Loan Data System loan year) and**Direct Lending Year** Enter the NSLDS loan year and direct lending year values that correspond to each academic level that you define.  
The PeopleSoft Financial Aid application references these values during the FA Term Build (financial aid term year) process.

## (AUS) Defining Level Dependent Load Rules

Access the Level Dependent Load Rules page (Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Level Dependent Load Rules).

Level Dependent Load Rules page

**Term Category** Select every term category that is valid for the academic load rule. Values for this field are delivered with your system as translate values. You can modify these values.

**Note.** Map every term category at your institution, regardless of your load determiner (units, default, or manual).

**Unit Term Total** Enter the unit term total for each term category and session type. The unit term total represents the number of units that must be taken to qualify for the academic load level and financial aid level.

<b>Academic Load</b>	Select the academic load value that corresponds to the unit term total. Values for this field are delivered with your system as translate values. You can modify these values.
<b>Financial Aid Load</b>	Select the financial aid load value. The financial aid load represents the financial aid load level equivalent to the academic load value. Values for this field are delivered with your system as translate values. You can modify these values.
<b>Include in Annual Load Calc</b> (include in annual load calculation)	Select this check box to include this load value in Australian EFTSL and HECS calculations. <hr/> <b>Note.</b> If you use this page to include load values, do not use the Academic Load Table page. <hr/>

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook, "(AUS) Generating Government Reports"*

**Defining Load Rules**

Access the Academic Load Table page (Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Academic Load Table).

Academic Level Table		Level Dependent Load Rules		Academic Load Table					
<b>SetID:</b>	PSUNV	<b>Academic Level Rule:</b> BUSN		Graduate Business					
Find   View All		First		1 of 1 Last					
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active						
Academic Load		NSC		Customize   Find					
First		1-8 of 8		Last					
	*Term Category	Session	Unit Term Total	*Academic Load	Res Terms Adj	*Financial Aid Load	Include In Annual Load Calc		
1	Regular		0.000	No Units		No Units	<input type="checkbox"/>	+	-
2	Regular		0.010	Part-Time		Less 1/2	<input type="checkbox"/>	+	-
3	Regular		4.000	Half-Time		Half-Time	<input type="checkbox"/>	+	-
4	Regular		8.000	Full-Time		Full-Time	<input type="checkbox"/>	+	-
5	Summer		0.000	No Units		No Units	<input type="checkbox"/>	+	-
6	Summer		0.010	Part-Time		Less 1/2	<input type="checkbox"/>	+	-
7	Summer		3.000	Half-Time		Half-Time	<input type="checkbox"/>	+	-
8	Summer		6.000	Full-Time		Full-Time	<input type="checkbox"/>	+	-

Academic Load Table page

The Consolidate Academic Statistics process uses these rules to determine a student's academic load when it processes an Academic Statistics Period for which the academic load rule value = Term Load Rule applies.

**Note.** Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

**Term Category**

Select every term category that is valid for the academic load rule. Values for this field are delivered with your system as translate values. You can modify these values.

**Note.** Map every term category at your institution, regardless of your load determiner (units, default, or manual).

**Session**

Enter the session type for the term category if you have more than one session in a term category and the sessions have different academic loads. For example, a summer session term type might have a 10-week session, a 12-week session, and two 6-week sessions. Your institution might not calculate the academic load for the 12-week session and the 6-week sessions in the same way.

---

**Note.** At least one row must be included with a blank session code for each term category. The system uses the row or rows with a blank session code to calculate academic load for the term. The system also calculates the load for the regular session using the row or rows with cleared sessions, which is why the term load and the regular academic session load will always be the same. In addition, a field edit prevents you from entering *1* in the Session field, because the system assumes that the cleared Session field represents the regular academic session. You must have at least one row with a blank session code for each term category in order for the system to calculate academic load based on units.

---

**Unit Term Total**

Enter the unit term total for each term category and session type. The unit term total represents the number of units that must be taken to qualify for the academic load level and financial aid level.

**Academic Load**

Select the academic load value that corresponds to the unit term total. Values for this field are delivered with your system as translate values. You can modify these values.

**Res Terms Adj** (residence terms adjust)

Enter the residence terms adjust value for each term category and session type to determine what constitutes a full term based on a student's academic load. In the exhibit, a part-time academic load is considered to be worth 50 percent of a full term, a three-quarter time academic load is considered to be worth 75 percent of a full term, and a full-time academic load is considered to be worth 100 percent of a full term. When a student is term activated, the student's approved academic load is used to determine the value of the Terms of Residency field based on the residence terms adjust factor. In this example, a part-time student would have a current in residence terms setting of 0.50 and a full-time student would have a setting of 1.00.

The system obtains the current in residence terms value from the Term Activation - Terms in Residence field.

See *PeopleSoft Financial Aid 9.0 PeopleBook*, "Managing Financial Aid Terms."

**Financial Aid Load**

Select the financial aid load value. The financial aid load represents the financial aid load level equivalent to the academic load value. Values for this field are delivered with your system as translate values. You can modify these values.

**(AUS) Include in Annual Load Calc**(include in annual load calculation)

Select to include this load value in Australian EFTSL and HECS calculations.

**Note.** If you use this page to include load values, do not use the Level Dependent Load Rules page.

**NSC Tab**

Access the NSC tab.

*Term Category	Session	Unit Term Total	NSC Academic Load	Course Load Pct
1 Intersesn		0.000		0.00
2 Intersesn		1.500	Half-Time	0.00
3 Intersesn		3.000	Full-Time	0.00
4 Regular		0.000		0.00
5 Regular		3.000	Less 1/2	25.00
6 Regular		6.000	Half-Time	50.00
7 Regular		9.000	Half-Time	75.00
8 Regular		12.000	Full-Time	100.00
9 Summer		0.000		0.00
10 Summer		3.000	Less 1/2	25.00
11 Summer		4.000	Half-Time	0.00
12 Summer		8.000	Full-Time	0.00
13 Summer		9.000	Half-Time	75.00

Academic Load Table page: NSC tab

**NSC Academic Load**  
(National Student Clearinghouse academic load)

Select the academic load value that your institution reports to the NSC. Values for this field are delivered with your system as translate values. You can modify these values.

**Course Load Pct**(course load percent) Enter the course percentage for the NSC academic load. For example, if you entered *Half-Time* for your NSC academic load, enter *50* (50 percent).

## Defining Contiguous Term Load Rules

Access the Statistics Period Load page (Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table, Statistics Period Load).

Level/Load Rules Table		Academic Level Table		Academic Load Table		Statistics Period Load			
<b>SetID:</b>	PSUNV								
<b>Academic Level Rule:</b>	UGRD		Undergraduate						
		Find   View All		First		1 of 1		Last	
<b>Effective Date:</b>	01/01/1900			<b>Status:</b>		Active			
		Find		First		1-5 of 5		Last	
*Academic Load Rule	Unit Total	*Academic Load	NSC Academic Load	*Financial Aid Load					
Contiguous	0.000	No Units		No Units					
Contiguous	0.500	Part-Time	Less 1/2	Less 1/2					
Contiguous	12.000	Half-Time	Half-Time	Half-Time					
Contiguous	18.000	3/4 Time	Half-Time	Three Qtrs					
Contiguous	24.000	Full-Time	Full-Time	Full-Time					

Statistics Period Load page

The Consolidate Academic Statistics process uses the rules on this page to determine a student's academic load when it processes an Academic Statistics Period during which the academic load rule value = Contiguous Terms.

**Note.** For the Consolidate Academic Statistics process to effectively combine a student's academic loads for contiguous terms, be sure that you define contiguous term academic load rules for every academic level rule at your institution.

### Academic Load Rule

Select *Contiguous* if you plan to use the Consolidated Academic Statistics process to combine a student's academic load unit totals for consecutive terms. If you do not use the Consolidated Academic Statistics process, clear this field and the other fields on this page.

### Unit Total

Enter the unit total for each contiguous term academic load rule. The unit term total represents the number of units that a student must take to qualify for the academic loads that you define on any given row of this page.

<b>Academic Load</b>	Select the academic load value that corresponds to the unit total for the row. Values for this field are delivered with your system as translate values. You can modify these values.
<b>NSC Academic Load</b> (National Student Clearinghouse academic load)	Select the NSC academic load value that corresponds to the unit total for the row. The NSC Extract process uses the NSC academic load for NSC reporting purposes. Values for this field are delivered with your system as translate values. You can modify these values.
<b>Financial Aid Load</b>	Select the financial aid load value corresponding to the unit total for the row. The financial aid load is the financial aid equivalent of the academic load for the row. Values for this field are delivered with your system as translate values. You can modify these values.

---

## Defining Academic Organizations

To set up academic organizations, use the Academic Organization Table component (ACADEMIC\_ORG\_TBL).

This section provides an overview of academic organizations and discusses how to:

- Modify academic organizations.
- Designate financial ownership for academic organizations.
- Designate human resource ownership for academic organizations.

## Understanding Academic Organizations

Academic organization structure defines how an academic institution is organized from an administrative perspective. At the lowest level, an academic organization can be compared to an academic department. At the highest level, an academic organization can represent a division.

Before you begin using academic organizations, you must first use PeopleSoft Tree Manager, which you access through PeopleTools, to define the academic organizations themselves, the hierarchy and levels of each academic organization, and the relationship between academic organizations in the hierarchy. One of the primary uses of the tree is to partition an academic institution for security purposes, controlling such areas as a user's access to course catalog data. The number and names of the levels in the academic organization tree can be revised by the institution by using PeopleTools.

Use the Academic Organization component to modify academic organization descriptions and to link each academic organization to one or more financial support or human resources departments on a percentage ownership basis. These relationships are used to report, analyze, and distribute revenue and workload credit.

### See Also

[Chapter 13, "Securing Your Academic Institution," Securing Academic Organizations, page 269](#)

*PeopleTools PeopleBook: PeopleSoft Tree Manager*



## Pages Used to Define Academic Organizations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Organization Table	ACADEMIC_ORG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Academic Organization Table	Modify descriptions of academic organizations; link an academic institution, campus, and manager to academic organizations; and define how the institution assigns instructors to classes. The system displays information entered through the academic organization tree in PeopleSoft Tree Manager. You can modify this information.
Acad Organization FS Owner (academic organization financial services owner)	ACAD_ORG_FSOWN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Acad Organization FS Owner	Designate the financial services department (business unit) responsible for this academic organization. You can use these relationships to report, analyze, and distribute revenue and workload credit. Relationships designated here have no effect on security.
Acad Organization HR Owner (academic organization human resources owner)	ACAD_ORG_HROWN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Acad Organization HR Owner	Designate the human resources department responsible for this academic organization. Use these relationships to report, analyze, and distribute revenue and workload credit. Relationships designated here have no effect on security.

## Modifying Academic Organizations

Access the Academic Organization Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Academic Organization Table).

Academic Organization Table page

**Warning!** If you are adding new academic organizations directly to this page, the academic institution value on the academic organization record *must* be the same as the academic institution that owns it in the academic organization tree. If these two values are not synchronized, security and reporting are adversely affected. Therefore, you should add new academic organizations through PeopleSoft Tree Manager.

The system populates the Effective Date, Status, Description, Short Description, Formal Description, Academic Institution, and Campus fields from the academic organization tree in PeopleSoft Tree Manager.

- Academic Institution** Enter the academic institution to which this academic organization belongs. This academic institution value must be the same as the academic institution on the academic organization tree. If these two Values are: not synchronized, security and reporting are adversely affected.
- (AUS) AOU Code**(academic organization unit code) Enter a code to link an academic organization unit (AOU) code to an academic organization.
- Campus** Enter the campus to which this academic organization belongs.
- Manager ID** Enter the manager for the academic organization, such as the department chair. This value is informational only and is currently not used in any internal system processes.

### ***Edit Instructor Against***

In this group box, select the view that the system should use when users search for an instructor to assign to classes while scheduling classes. Options are:

<b>Personal Data</b>	This field is used for reporting purposes only.
<b>Instructor Advisor</b>	People defined as instructors and advisors in the Instructor/Advisor Table component. The Instructor/Advisor component enables you to link instructors to courses for which they are approved and available to teach for specified periods of time. When you are scheduling classes and entering an instructor, the system displays only these instructors, thus simplifying the assignment of instructors to classes.

### ***Assign Instructor By***

If you select the Instructor Advisor option in the Edit Instructor Against group box, the Assign Instructor By group box becomes available. Select how the institution wants to assign instructors for this academic organization. You can select one, none, or any combination of these options: *Campus*, *Subject*, and *Course*. If you select none of these options, the instructor advisor edit applies to all courses within this academic organization.

Remember that for whichever options you select, you must define these same options for each instructor on the Approved Courses page of the Instructor/Advisor Table component. Only then does the instructor's name appear as a choice for the Instructor ID field on the Meetings page or Exam page when you schedule classes. For example, if you select the Subject and Campus options, you must enter values for both the Subject and Campus fields on the Approved Courses page to make the instructor approved and available for instruction.

---

**Warning!** Changing the saved selection for the Edit Instructor Against or Assign Instructor By group boxes removes an instructor's course rows on the Approved Courses page for the academic organization. The system, however, does maintain the rows for other academic organizations.

---

### **See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Preparing for the Course Catalog and Schedule of Classes," Designating Approved Instructors and Advisors

## **Designating Financial Ownership for Academic Organizations**

Access the Acad Organization FS Owner page (Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Acad Organization FS Owner).

<b>Business Unit</b>	Enter the business unit considered to be the financial support unit of this academic organization.
<b>Department</b>	Enter the department in which the business unit is housed. Enter department values on the Department Table page.

**Percent Owned** Enter the percentage of the academic organization for which the business unit is responsible. You can have multiple business units with split ownership of the academic organization, but the total percent owned among all business units must equal 100.

## Designating Human Resource Ownership for Academic Organizations

Access the Acad Organization HR Owner page (Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Acad Organization HR Owner).

**Department** Enter the department responsible for human resources support for this academic organization. Enter department values on the Department Table page.

**Percent Owned** Enter the percentage of the academic organization for which the human resources department is responsible. You can have multiple human resources departments with split ownership of the academic organization, but the total percent owned among all departments must equal 100.

---

## Defining Academic Groups

To set up academic groups, use the Academic Group Table component (ACADEMIC\_GROUP\_TBL).

This section provides an overview of academic groups and discusses how to:

- Describe academic groups.
- Link academic career catalog numbers to academic groups.
- Define standard class meeting patterns.

## Understanding Academic Groups

Academic groups are the highest level breakdowns of the academic institution for academic structural purposes. Often each school or college within an academic institution is defined as an academic group. Sometimes units such as extended education are defined as an academic group if classes are offered separately from the standard colleges or schools. For example, PeopleSoft University comprises the College of Liberal Arts, the College of Engineering, the School of Law, the School of Education, and the Evening Extension Division. Each entity is defined as an academic group in the system. Academic groups can offer academic programs in more than one academic career, and academic careers can cross academic groups. In the previous example, the College of Liberal Arts and the College of Engineering contain both undergraduate and graduate academic careers, but the School of Law contains only one academic career, which is not shared with any other academic group.

To link an academic group to an academic institution and an academic organization, add the academic group through the Academic Group Table component *and* add the academic group as a child node to academic institutions and academic organizations in PeopleSoft Tree Manager—one aspect does not update the other aspect. In PeopleSoft Tree Manager, every node is defined by its relation to other nodes. In most cases, academic groups are defined as the next level of academic organization structure below academic institution. However, academic groups can occur at any level within the academic organization structure. It is not essential for academic groups to follow the same hierarchical structure as academic organizations. Although this is the case for most institutions, some might want to use academic groups and academic organizations to represent different dimensions of a matrix organization. In such a case, academic groups would not be child nodes in the academic organization tree but rather set apart as nodes at the same level as academic organizations.

Use the Academic Group Table component to define academic groups and link academic careers and standard class meeting patterns to them.

## Pages Used to Define Academic Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Group Table	ACADEMIC_GROUP_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Academic Group Table	Describe academic groups.
Academic Career Level Table	CATLG_CAREER_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Academic Career Level Table	Link academic careers and ranges of catalog numbers to academic groups. These values serve as a data entry and tracking aid as you create the course catalog. When you enter a catalog number on the Offerings page of the Course Catalog component, the system displays the correct academic career value.
Standard Meeting Patterns	STND_MTG_PAT_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Standard Meeting Patterns	Define standard class meeting patterns for an academic group. All typical patterns must be defined here, including the to-be-announced class meeting pattern. These patterns are a data entry aid when scheduling classes.

## Describing Academic Groups

Access the Academic Group Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Academic Group Table).

Academic Group Table		Academic Career Level Table		Standard Meeting Patterns	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University			
<b>Academic Group:</b>	LBART				
Find   View All    First ◀ 1 of 1 ▶ Last					
<b>*Effective Date:</b>	01/01/1900	<b>*Status:</b>	Active		
<b>*Description:</b>	College of Liberal Arts				
<b>Short Description:</b>	Lib Arts				
<b>Course Defaults</b>					
<input type="checkbox"/>	<b>Student Specific Permissions</b>				
<input checked="" type="checkbox"/>	<b>Auto Enroll from Wait List</b>				

Academic Group Table page

### Course Defaults

Use the Course Defaults group box to set default values for the course catalog and schedule of classes pages. The fields in this group box simplify data entry. You can override these default values for individual courses and classes.

**Student Specific Permissions** Select to have all classes scheduled within this academic institution and academic group require that you generate permissions for students to enroll in classes. The check box value migrates to the Class Schedule Entry page, where it can be overridden. Student-specific permissions require that you generate permissions for individual students.

**Auto Enroll from Wait List** Select to have all classes scheduled within this academic institution and academic group automatically enroll students from waiting lists into classes whenever spaces are available and the wait list process is run. The check box value migrates to the Enrollment Control page of the schedule of classes components, where it can be overridden.

## Linking Academic Career Catalog Numbers to Academic Groups

Access the Academic Career Level Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Academic Career Level Table).

Academic Group Table		Academic Career Level Table		Standard Meeting Patterns	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University			
<b>Academic Group:</b>	LBART	College of Liberal Arts			
Find   View All    First ◀ 1 of 1 ▶ Last					
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active		
Find    First ◀ 1-2 of 2 ▶ Last					
<b>*Academic Career</b>		<b>*Catalog Nbr To</b>			
<input type="text" value="GRAD"/> 🔍	Graduate	<input type="text" value="799"/>	<input type="button" value="+"/> <input type="button" value="-"/>		
<input type="text" value="UGRD"/> 🔍	Undergraduate	<input type="text" value="499"/>	<input type="button" value="+"/> <input type="button" value="-"/>		

Academic Career Level Table page

### Academic Career

Enter the academic career that you want to link to this academic group. Insert additional rows to enter all academic careers that you want to link to this academic group.

### Catalog Nbr To (catalog number to)

For each academic career that you link to this academic group, enter the course number immediately *after* the highest possible course catalog number for that academic career. For example, if the highest possible course catalog number within the College of Liberal Arts for the undergraduate academic career is 299, enter 300 in the field. Likewise, if the highest catalog number for the graduate academic career is 599, enter 600 into the field. The number that you enter defines the lowest possible catalog number for the subsequent academic career within this academic group. In this example, 300 would be the first catalog number of the graduate academic career within the College of Liberal Arts.

When you create a new course offering on the Offerings page of the Course Catalog component, the system displays the academic career value based on the academic career and catalog number combinations from this page. In the preceding example, if you create a course within the College of Liberal Arts with a catalog number of 300, the system displays the academic career *Graduate*. If the catalog number is 299, the system displays the academic career *Undergraduate*.

## Defining Standard Class Meeting Patterns

Access the Standard Meeting Patterns page (Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Standard Meeting Patterns).

Academic_Group Table		Academic_Career Level Table		Standard Meeting Patterns	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University			
<b>Academic Group:</b>	LBART	College of Liberal Arts			
Find   View All First 1 of 1 Last					
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active		
Find   View All First 1 of 12 Last					
<b>*Standard Meeting Pattern:</b>	FRI				+ -
<b>*Description:</b>	Friday				
<b>Short Description:</b>	F				
	<input type="checkbox"/> Monday	<input checked="" type="checkbox"/> Friday			
	<input type="checkbox"/> Tuesday	<input type="checkbox"/> Saturday			
	<input type="checkbox"/> Wednesday	<input type="checkbox"/> Sunday			
	<input type="checkbox"/> Thursday				
<b>Normal Class Duration:</b>	150				

Standard Meeting Patterns page

**Standard Meeting Pattern** Enter a code to represent the standard class meeting pattern for this academic group. Insert additional rows to add more standard meeting patterns for this academic group.

**Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday** Select the appropriate days of the week for this standard meeting pattern.

**Normal Class Duration** Enter the number of minutes for each class in this standard meeting pattern.

---

## Establishing Fields of Study

To set up fields of study, use the Field of Study Table component (STUDY\_FIELD\_TABLE).

This section lists the page used to establish fields of study.



## Page Used to Establish Fields of Study

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Field of Study Table	STUDY_FIELD_TABLE	Set Up SACR, Foundation Tables, Reporting Codes, Field of Study Table, Field of Study Table	Define fields of study. Link fields of study to academic subjects on the Subject Taxonomy page and to academic plans on the Academic Plan Taxonomy page.

## Modifying CIP and HEGIS Codes

To set up CIP and HEGIS codes, use the CIP Code Table component (CIP\_CODE\_TABLE) and the HEGIS Code Table component (HEGIS\_CODE\_TABLE). Use the SSR\_CIP\_CODE\_TABLE and SSR\_HEGIS\_CODE\_TABLE component interfaces to load the data into the tables for these component interfaces.

CIP and HEGIS codes are delivered with the system. You can modify descriptions of the codes and add new codes through the CIP Code Table page and the HEGIS Code Table page. This section discusses how to modify CIP and HEGIS codes.

## Pages Used to Modify CIP and HEGIS Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CIP Code Table	CIP_CODE_TABLE	Set Up SACR, Foundation Tables, Reporting Codes, CIP Code Table, CIP Code Table	Modify descriptions of the CIP codes shipped with Campus Solutions.
HEGIS Code Table	HEGIS_CODE_TABLE	Set Up SACR, Foundation Tables, Reporting Codes, HEGIS Code Table, HEGIS Code Table	Modify descriptions of the HEGIS codes shipped with Campus Solutions.

## Modifying CIP Codes

Access the CIP Code Table page (Set Up SACR, Foundation Tables, Reporting Codes, CIP Code Table, CIP Code Table).

**Alternative CIP Code**  
(alternative classification of instructional programs code)

Some states derive their own coding schemes from the CIP code. If applicable, enter the alternative CIP code of the state.

**Valid SEVIS CIP Code**

Select *Yes* to indicate that the code is the valid SEVIS CIP code for the area of study.

Select *No* if either the code is not the valid SEVIS CIP code or you are unsure if it is the valid SEVIS CIP code.

When Valid SEVIS CIP Code is set to *Yes* for a code, the Validate SEVIS CIP Code process available from within the SEVIS Alerts process, can compare the CIP code in an event to the valid code and if the codes do not match, the process can generate and display an error message in the alerts.

When the Valid SEVIS CIP Code is set to *No* for a code, the validation process generates an error message that appears in the alerts.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "(USA) Managing PeopleSoft SEVIS Solution Visa Processing for J and F/M Visas."

**Modifying HEGIS Codes**

Access the HEGIS Code Table page (Set Up SACR, Foundation Tables, Reporting Codes, HEGIS Code Table, HEGIS Code Table).

The screenshot shows the 'HEGIS Code Table' page with the following details:

- HEGIS Code:** 01.01
- \*Effective Date:** 01/01/1900
- \*Status:** Active
- \*Description:** AGRICULTURE-GEN
- Description:** AGRICULTURE-GEN
- Hegis Code Type:** C
- External Org ID:** SR1000 (Community College 1)
- Education level:** (empty)
- Lab Code:** (empty)
- Course Ref Code:** (empty)
- Pgrss Unt:** (empty)
- Partial Qualification
- Final Qualification

HEGIS Code Table page

**(NLD) HEGIS Code Information**

**Hegis Code Type**

Enter a code type. Two types of code are available, one for a training program and one for a training course.

**External Org ID** (external organization ID)

Enter an ID. This value is used for MBO codes.

**Education level**

Enter the level of education for which the code is offered.

<b>Lob Code</b> (line of business)	Enter the internal code of a national institution for the subqualification.
<b>Course Ref Code</b> (course reference code)	Enter the course to which the code is linked.
<b>Partial Qualification</b>	Select whenever the code is being used for a subqualification or a course.
<b>Final Qualification</b>	Select whenever the code is being used for a qualification or a training program.

---

## Defining Subject Areas

To set up subject areas, use the Academic Subject Table component (SUBJECT\_TABLE).

This section provides an overview of subject areas and discusses how to:

- Describe subject areas.
- Define subject area taxonomy.
- Define subject and component multipliers.

## Understanding Subject Areas

Subject areas are the specific areas of instruction in which courses are offered within academic organizations. For example, when a course is identified as Math 101, math is the subject area. Subject areas are tied to the academic organization tree by the academic organization data for each subject area and by detail nodes for academic organizations in PeopleSoft Tree Manager. Subject areas are also tied to courses, which you link to later when developing the course catalogs.

Before using subject areas, use PeopleSoft Tree Manager, accessed through PeopleTools, to define the academic organizations and to create a hierarchical representation of subject areas by linking subject areas as detail nodes to the academic organizations. One of the primary uses of defining subject areas as detail nodes on the academic organization tree is to limit access to academic subjects.

### See Also

[Chapter 13, "Securing Your Academic Institution," page 243](#)

*PeopleTools PeopleBook: PeopleSoft Tree Manager*

## Pages Used to Define Subject Areas

Page Name	Definition Name	Navigation	Usage
Academic Subject Table	SUBJECT_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Academic Subject Table	Describe subject areas, modify existing subject area descriptions, link subject areas to academic organizations, and set other parameters, such as blind grading.
Subject Taxonomy	SUBJECT_TAXONOMY	Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Taxonomy	Define subject area taxonomy by linking subject areas to CIP and HEGIS codes and to fields of study.
Subject Workload	SUBJ_WORKLD_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Workload	Define subject and component multipliers by the weight of each component within each subject area at the academic institution.

## Describing Subject Areas

Access the Academic Subject Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Academic Subject Table).

Academic Subject Table
Subject Taxonomy
Subject Workload

**Academic Institution:** PSUNV PeopleSoft University

**Subject Area:** CHEM

Find | View All
First 1 of 1 Last

**\*Effective Date:** 01/01/1900 31 **\*Status:** Active + -

**\*Description:** Chemistry

**Short Desc:** Chemistry

**\*Formal Description:** Chemistry

**External Subject Area:**  🔍  Use Blind Grading

**\*Academic Organization:** CHEMISTRY 🔍 Chemistry  Split Ownership

Academic Subject Table page

<b>External Subject Area</b>	Currently not in use.
<b>Academic Organization</b>	Enter the academic organization that offers courses in this subject area. Any academic organization entered here should also have a detail node associated with it for this subject area on the academic organization tree.
<b>Use Blind Grading</b>	Select to indicate that blind grading be used for every course within this subject area. This selection is the default value and can be changed on a course-by-course basis on the Offerings page of the Course Catalog component. Blind grading enables you to create a grade roster with randomly generated numbers rather than student IDs.
<b>Split Ownership</b>	Select to designate multiple academic organization owners for this subject area. If you select this check box, the Academic Organization field and the Percent Owned field become available for edit.

## Defining Subject Area Taxonomy

Access the Subject Taxonomy page (Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Taxonomy).

Academic Subject Table	Subject Taxonomy	Subject Workload
<b>Academic Institution:</b>	PSUNV	PeopleSoft University
<b>Subject Area:</b>	ACCT	Accounting
View All    First ◀ 1 of 1 ▶ Last		
<b>Effective Date:</b>	01/01/1900	<b>Status:</b> Active
<b>CIP Code:</b>	<input type="text" value="01.0103"/> 🔍	Agricultural Economics
<b>HEGIS Code:</b>	<input type="text" value="01.01"/> 🔍	AGRICULTURE-GEN
<b>Field of Study:</b>	<input type="text" value="MATH"/> 🔍	Mathematics
<b>Field of Education Code:</b>	<input type="text" value="010101"/> 🔍	Mathematics
<b>HECS Band ID:</b>	<input type="text" value="Fixed HECE"/> ▼	
<b>Discipline Group Code:</b>	<input type="text" value="0501"/> 🔍	Mathematics, Statistics

Subject Taxonomy page

<b>CIP Code</b>	Enter the CIP code for this subject area. CIP code. Values are delivered with the system as translate values. You can modify CIP codes on the CIP Code Table page.
-----------------	--

<b>HEGIS Code</b>	Enter the HEGIS code for this subject area. HEGIS codes are delivered with the system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.
<b>Field of Study</b>	Enter a field of study for this subject area.
<b>(AUS) Field of Education Code</b>	Enter a code so that it is linked to the subject area. During DEST reporting, this value is used in compiling statistics.
<b>(AUS) HECS Band ID</b>	This ID is used in Student Financials, but is defined in Student Records. Band IDs determine how much a student pays for a class. Select an ID to link it to a course. You can select the ID for a subject, course offering, or field of education. The ID identifies the HECS band which is used to determine the HECS contribution for a class.
<b>(AUS) Discipline Group Code</b>	Enter a code to group students for DEST reporting. The code is assigned to the student by default during enrollment, but it can be overridden.

## Defining Subject and Component Multipliers

Access the Subject Workload page (Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Workload).

### See Also

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Instructor Workload"

*PeopleSoft Student Records 9.0 PeopleBook*, "Tracking Instructor Workload"

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## (NLD) Defining Dutch Academic Structure

To set up Dutch academic structure, use these components: Cluster Code Table NLD (SSR\_CLUST\_CD\_NLD), GBA Country Code Table (SSR\_COUNTRY\_NLD), MBO Code Table NLD (SSR\_MBO\_CD\_NLD), BRINcode Table NLD (SCC\_BRINCODE\_NLD), SUB-BRINCODE Table (SCC\_SUBBRIN\_NLD), GBA Nationality Code Table (SSR\_NATIONAL\_NLD), and Prior Education Table NLD (SSR\_PRE\_EDU\_NLD).

This section lists the pages used to define values that set up academic structures in the Netherlands.

## Pages Used to Define Dutch Academic Structure

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Cluster Codes Table	SSR_CLUSTER_CD_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, Cluster Code Table NLD, Cluster Codes Table	Define cluster codes, which can be registered for Prior Education table entries. These codes provide a higher level of aggregation that combines multiple forms of education into one educational cluster. During the admissions process, entering a cluster detail code for a specific student prior to education entry can refine this aggregation.
GBA Country	SSR_COUNTRY_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, GBA Country Code Table, GBA Country	Register GBA country codes, which are supplied by the Dutch Ministry of Internal Affairs. These codes are linked to the Country Code table.
MBO Code Table	SSR_MBO_CD_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, MBO Code Table NLD, MBO Code Table	Define MBO codes, which are used to register for specific forms of education on the Dutch Education table.
BRINcode Table	SCC_BRINCODE_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, BRINcode Table NLD	Define and maintain BRINcodes.  The Dutch Ministry of Higher Education assigns BRINcodes to institutions and several interfaces such as CBAP, Studielink, and BRON use BRINcodes. Use BRINcodes to communicate with the Ministry. You can link BRINcodes to academic programs, campuses, and academic organizations.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
SUB-BRINCODE Table	SCC_SUBBRIN_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, SubBrincode Table NLD	<p>Define and maintain Sub BRINcodes for each unique BRINcode location.</p> <p>A Sub BRINcode can be a location of your institution, location of a Prior Education School, or a location of an external organization certified for internship placements.</p>
GBA Nationality	SSR_NATIONAL_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, GBA Nationality Code Table, GBA Nationality	<p>Register GBA nationality codes, which are supplied by the Dutch Ministry of Internal Affairs.</p> <p>Registration of a student's nationality is mandatory in the Netherlands. This official country code is necessary for use with CBAP functionality and BRON.</p>
Prior Education Table	SSR_PRE_EDU_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, Prior Education Table NLD, Prior Education Table	<p>Define previous education codes, which are used to note a specific level of education attained by students. This information is relevant for the current admission to a specific academic program.</p>

## Defining BRINcodes

Access the BRINcode Table page (Set Up SACR, Foundation Tables, Academic Structure NLD, BRINcode Table NLD).



BRINcode Table page

### Brin Type

Select *External* if you want to define a BRINcode for an external organization such as a Prior Education School or an Internship Organization.

Select *Internal* if you want to map the BRINcode to an academic program.

### External Org ID

This field appears when you select *External* in the Brin Type field.

To add external organizations, select Campus Community, Organization, Create/Maintain Organizations, Organization Table.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Adding Organizations to Your Database."

## Defining Sub BRINcodes

Access the SUB-BRINCODE Table page (Set Up SACR, Foundation Tables, Academic Structure NLD, SubBrincode Table NLD).

**SUB-BRINCODE Table**

BRINcode 20QC Sub BRINcode 00 External Org ID 000010002

Find | View All First 1 of 1 Last

Effective Date 01/01/1900 Status Active

Description External Sub BRINcode example

Location Nbr 1 School Office

SUB-BRINCODE Table page

**Location Nbr**(location number)

This field appears for a BRINcode that has an External Brin Type. To add organization locations, select Campus Community, Organization, Create/Maintain Organization, Organization Locations.

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**Note.** A Sub BRINcode can be alphanumeric.

---

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Organization Data," Entering Organization Location Data.

## Chapter 7

# Establishing Terms and Sessions

Terms, sessions, and academic calendars are time elements. As you define these elements, consider how they affect the business processes. For instance, they can affect class enrollment, financial aid, billing, tuition refunds, and statistical reporting.

This chapter discusses how to:

- Define term values.
- Set up time periods.
- Define enrollment action reasons.
- Define terms, sessions, and session time periods.

### **See Also**

[Chapter 8, "Defining Traditional Academic Calendars," page 163](#)

[Chapter 9, "Defining Dynamic Academic Calendars," page 175](#)

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## Defining Term Values

To set up term values, use the Term Values Table component (TERM\_VALUES\_TABLE).

This section discusses how to set up term values and control their display in Self Service.

### Pages Used to Define Term Values

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Term Values Table	TERM_VALUES_TABLE	Set Up SACR, Foundation Tables, Term Setup, Term Values Table, Term Values Table	Set up term values and their descriptions. You use these term values for all academic institutions and careers throughout Campus Solutions, regardless of the structure of the terms that you define.

Page Name	Definition Name	Navigation	Usage
Display Term in Class Search	TERM_VALUES_TBL2	Set Up SACR, Foundation Tables, Term Setup, Term Values Table, Display in Class Search	Define dates to control the availability of terms on self-service pages, both for students and faculty.

## Setting Up Term Values

Access the Term Values Table page (Set Up SACR, Foundation Tables, Term Setup, Term Values Table, Term Values Table).

Term Values Table		Display in Class Search	
Term Values Table			
Find   View 100   First 64-72 of 247   Last			
*Term	*Description	*Short Desc	Last Class Nbr
0657	2011 Intersession	2011 Inter	1001
0655	2011 Winter Qtr	2011 WtQt	1297
0652	2010 Fall Qtr	2010 FIQt	1421
0650	2010 Fall	2010 Fall	6251
0649	2010 Semester 2	2010 Sem2	1539
0647	2010 Summer Qtr	2010 SmQt	1213
0645	2010 Summer	2010 Sum	1125
0642	2010 Spring Qtr	2010 SpQt	1131
0641	2010 Semester 1	2010 Sem1	1545

Term Values Table page

### Term

Enter the numeric code that uniquely identifies the term. You must define terms in sequential order so that you can correctly sort, report, and analyze term data. For example, the system accumulates statistics and evaluates degree progress by the sequence of terms. In addition, you should assign term values in increments of two or three so that you can insert additional terms, such as intersession or summer terms, later.

**Last Class Nbr** (last class number)

Enter the class number from which you want the class scheduling processes to begin assigning class numbers. When you schedule a new class through either the manual or term roll process, the process references this field for the term in which you are creating the class, and it assigns the class the *next* number.

For example, if you have set this field to *1000* for term 0641, when you schedule a new class for term 0641, the class scheduling process assigns the class the number 1001 and updates the field value on this page to *1001*. The next new class that you schedule for term 0641 is number 1002. This process continues until you have assigned a number to all the classes. Use large number increments between subsequent terms to avoid having students mistakenly use a class number from the previous term to enroll in a class for the current term.

## Setting Up Term Display in Class Search

Access the Display in Class Search page (Set Up SACR, Foundation Tables, Term Setup, Term Values Table, Display in Class Search).

Term Values Table		Display in Class Search			
Display Term in Class Search					
		Self-Service Student/Visitor		Self-Service Instructor/Advisr	
Term	Description	'Display From	'Display To	'Display From	'Display To
0657	2011 Intersession	01/01/2010	12/31/2012	01/01/2009	12/31/3000
0655	2011 Winter Qtr	01/01/2010	12/31/2012	01/01/2009	12/31/3000
0652	2010 Fall Qtr	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0650	2010 Fall	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0649	2010 Semester 2	01/01/1900	12/31/3000	01/01/1900	12/31/3000
0647	2010 Summer Qtr	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0645	2010 Summer	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0642	2010 Spring Qtr	01/01/2009	12/31/2011	01/01/2008	12/31/3000
0641	2010 Semester 1	01/01/1900	12/31/3000	01/01/1900	12/31/3000

Display in Class Search page

Enter the date range in which you want the term to appear in the self-service class search and browse course catalog options for students and visitors. You can define a separate date range for instructors and advisors. All terms appear within administrative pages.

---

**Note.** The SSR\_CLASS (Class Search) web service is one of a number of delivered Enrollment Web Services. The service operation SSR\_GET\_CLASSES: Retrieve Classes validates the term value that is entered by a user (for example a student using a self service enrollment user interface) against the date range for the term for Self Service Student/Visitor on this page. An error message is sent if the term is not within the specified date range.

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For detailed information about Enrollment Web Services:

See Enrollment Web Services Developers Guide and Enrollment Web Services Users Guide on My Oracle Support, ID 751540.1 (original release: Additional Features July 2011).

See *PeopleSoft Student Records 9.0 PeopleBook*, "Using Enrollment Web Services."

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## Setting Up Time Periods

To set up time periods, use the Time Period Table component (TIME\_PERIOD\_TABLE).

This section discusses how to define time periods.

### Page Used to Set Up Time Periods

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Time Period Table	TIME_PERIOD_TABLE	Set Up SACR, Product Related, Student Records, Enrollment, Time Period Table, Time Period Table	Define the time periods, or critical points in time, that are valid for each academic career within a setID.

### Defining Time Periods

Access the Time Period Table page (Set Up SACR, Product Related, Student Records, Enrollment, Time Period Table, Time Period Table).

**Time Period Table**

**SetID:** PSUNV  
**Academic Career:** CNED Continuing Education

*Time Period	*Description	*Short Description		
110	End of First Week	End 1st Wk	+	-
120	End of Second Week	End 2nd Wk	+	-
150	Mid-Session	Mid-Sessn	+	-
300	End of Term	End Term	+	-
400	End of Grading Period	End Grd Pd	+	-
999	Forever	Forever	+	-

Time Period Table page

Time periods identify landmark session dates (on the Session Time Period Table page), secure access to various enrollment functions by enrollment access ID (on the Enrollment Functions page), and define how enrollment action reasons relate to the dropping of classes (on the Enrollment Action Reason Table page).

**Time Period** Enter a time period that is valid for the academic career and setID. You can add more time period translate values, provided that you attach your own coding to them.

**Description** This field is populated by the translate table when you enter a time period.

**Short Description** This field is populated by the translate table when you enter a time period.

**See Also**

Chapter 16, "Securing Student Records," page 299

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## Defining Enrollment Action Reasons

To set up enrollment action reasons, use the Enrollment Action Reason component (ENRL\_RSN\_TBL).

This section discusses how to define enrollment action reasons.

## Page Used to Define Enrollment Action Reasons

Page Name	Definition Name	Navigation	Usage
Enrollment Action Reason Table	ENRL_RSN_TBL	Set Up SACR, Product Related, Student Records, Enrollment, Enrollment Action Reason, Enrollment Action Reason Table	Define enrollment action reasons to provide relevant information about class enrollment transactions.

## Defining Enrollment Action Reasons

Access the Enrollment Action Reason Table page (Set Up SACR, Product Related, Student Records, Enrollment, Enrollment Action Reason, Enrollment Action Reason Table).

### Enrollment Action Reason Table

**SetID:** PSUNV                      **Academic Career:** Graduate Business

**Enrollment Action:** Drop

**Reason Code:** TCAN

---

Enrollment Action Reason Find | View All    First ◀ 1 of 1 ▶ Last

<b>*Effective Date</b>	<b>*Description</b>	<b>Short Description</b>
<input type="text" value="01/01/1900"/>	<b>Retain Drop Until Time Period</b>	<b>*Status</b>
	<input type="text" value="Term Cancellation"/>	<input type="text" value="Trm Cancel"/>
	<input type="text" value="999"/> Forever	<input type="text" value="Active"/>

Enrollment Action Reason Table page

Enrollment action reasons are linked to enrollment actions such as *Add Grade*, *Drop*, and *Enroll*. Enrollment actions are delivered with the system as translate values. You can add enrollment actions to the translate table.



**Retain Drop Until Time Period**

If the institution needs to retain student enrollment records during part of the drop delete period, you can associate time periods with enrollment action reasons that you define for enrollment drop actions. When you create an enrollment request with an enrollment drop action, you can then enter an enrollment action reason that has a time period associated with it. For requests during the drop delete period but before the end of the time period, the enrollment engine retains the affected student enrollment records. For requests during the drop delete period but after the time period, the enrollment engine deletes the affected student enrollment records.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook, "Using Enrollment-Related Processes"*

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## Defining Terms, Sessions, and Session Time Periods

To set up terms, sessions, and session time periods, use the Term/Session Table component (TERM\_TABLE).

Campus Solutions enables you to link defined terms to every academic career at an academic institution. This functionality enables you to structure different terms and sessions, depending on the academic career, to suit the needs of the institution.

This section discusses how to:

- Define terms.
- Define sessions.
- Define session time periods.

## Pages Used to Define Terms, Sessions, and Session Time Periods

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Term Table	TERM_TABLE	Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Term Table	Define terms within academic careers. Different academic careers at an institution can have different term structures.
Session Table	SESSION_TABLE	Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Session Table	Define the sessions of a term, including the significant dates within the session. Sessions subdivide a term into multiple time periods in which to offer classes.

Page Name	Definition Name	Navigation	Usage
Session Time Periods	SESS_TIME_PERIODS	Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Session Time Periods	Define landmark time periods within each session of a term. The system uses time periods for enrollment security purposes.

## Defining Terms

Access the Term Table page (Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Term Table).

Term Table	Session Table	Session Time Periods
<b>Academic Institution:</b>	PSUNV	PeopleSoft University
<b>Academic Career:</b>	BUSN	Graduate Business
<b>Term:</b>	0585	2007 Summer
<b>*Description:</b>	<input type="text" value="2007 Summer"/>	
<b>Short Description:</b>	<input type="text" value="2007 Sum"/>	
<b>*Term Category:</b>	Summer Term <input type="button" value="v"/>	
<b>*Term Begin Date:</b>	<input type="text" value="05/23/2007"/> <input type="button" value="B1"/>	<b>*Ending Date:</b> <input type="text" value="08/14/2007"/> <input type="button" value="B1"/>
<b>*Academic Year:</b>	<input type="text" value="2007"/>	
<b>*Holiday Schedule:</b>	<input type="text" value="PSS"/> <input type="button" value="M"/>	Academic Holiday Schedule
<b>Default Session Code:</b>	<input type="text" value="12W"/> <input type="button" value="M"/>	Twelve Week
<b>*Weeks of Instruction:</b>	<input type="text" value="12"/>	
<b>*Transcript Date Print:</b>	Do Not Print Any Dates <input type="button" value="v"/>	
<b>*Sixty Percent Point in Time:</b>	<input type="text" value="07/11/2007"/> <input type="button" value="B1"/>	
<b>Use Dynamic Class Dates:</b>	<input type="checkbox"/>	
<b>*Max Program Effdt for Term:</b>	<input type="text" value="05/23/2007"/> <input type="button" value="B1"/>	
<b>Display in Self-Service in Term Drop Down</b>		
	<b>Begin Date</b>	<b>End Date</b>
<b>*Enrollment &amp; Shopping Cart</b>	<input type="text" value="01/01/1900"/> <input type="button" value="B1"/>	<input type="text" value="08/14/2007"/> <input type="button" value="B1"/>
<b>*Student Planner</b>	<input type="text" value="01/01/1900"/> <input type="button" value="B1"/>	<input type="text" value="08/14/2007"/> <input type="button" value="B1"/>

Term Table page

A term is an administrative time period within which sessions are defined, students are billed, and statistics are accumulated for individual students and the entire academic institution.

<b>Term Category</b>	Select the category that best describes the term. You can modify these translate values.
<b>Term Begin Date and Ending Date</b>	Enter the first and last official dates of the term. The system uses the term begin date as the effective date of the term. The term begin and end dates are important because they determine, for example, the courses that are available for the term and the status of a student's academic program and academic plan. These dates are referenced throughout the system.
<b>Academic Year</b>	Enter the academic year to which the term belongs. For example, <i>2004</i> indicates that the term belongs to the 2004–2005 academic year. You must associate each term with an academic year for reporting and financial aid accumulation purposes. However, you can modify the financial aid academic year for individual students.
<b>Holiday Schedule</b>	Enter the holiday schedule for the term. Define holiday schedule values on the Holiday Schedule Table page in HRMS.
<b>Default Session Code</b>	Enter the default session code. This value is used throughout the system to supply the session code associated with the term, although the value can be overridden. The default serves as a data entry aid.
<b>Weeks of Instruction</b>	Enter the standard number of weeks of instruction for classes offered in the term. The Instructor Workload feature in Student Records uses this value when calculating faculty workload. Financial Aid uses this value when building terms and projections.
<b>Transcript Date Print</b>	<p>Select the dates to print on student transcripts for this academic career and term combination. The value of this field appears by default, based on the corresponding field value from the SA Options (student administration options) page of the Installation Table component. Any modification to these translate values requires substantial programming. Values are:</p> <p><i>Do Not Print Any Dates:</i> No dates are printed on student transcripts.</p> <p><i>Print Class Dates:</i> To print class dates on student transcripts for the specified transcript type, select this value and the Print Class Dates check box on the Enrollment/Statistics page of the Transcript Type component.</p> <p><i>Print Session Dates:</i> Select to print session dates on student transcripts.</p> <p><i>Print Term Dates:</i> Select to print term dates on student transcripts.</p>
<b>Sixty Percent Point in Time</b>	Enter the date on which the term is 60 percent complete. The system uses this date when computing refunds for students. In the U.S., most academic institutions stop issuing refunds at this point.
<b>Use Dynamic Class Dates</b>	Select to enable the Dynamic Class Dates feature for all sessions scheduled in this term. The system migrates the value of this check box to the corresponding field on the Session Table page, where you can override the selection for a specific session.

**Max Program Effdt for Term** Enter the date to be used as the deadline for term activation in a given term. (maximum program effective date for term) The date appears by default from the Academic Career Table page. The deadline can be modified on the Term Table, but must be equal to or after the term start and before the Term end date.

### ***Display in Self-Service in Term Drop Down***

Define dates in this group box to control the availability of self-service enrollment and My Planner features by term.

**Enrollment & Shopping Cart** Enter a range of dates to control the availability of this term in the Select Term field on student self-service enrollment and shopping cart pages. The student self-service Class Search & Browse Course Catalog also uses the date range to determine if the Select button should appear, which allows the student to add the class to their shopping cart.

---

**Note.** The SSR\_ENROLLMENT web service is one of a number of delivered Enrollment Web Services. The service operation SSR\_GET\_ENROLLMENT supports the retrieval of the StudyList details for an enrolled student. The service validates the term value that is entered by a user (for example a student using a self service enrollment user interface) against the date range for the term in the Enrollment & Shopping Cart field. An error message is sent if the term is not within the specified date range.

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For detailed information about Enrollment Web Services:

See Enrollment Web Services Developers Guide and Enrollment Web Services Users Guide on My Oracle Support, ID 751540.1 (original release: Additional Features July 2011).

See *PeopleSoft Student Records 9.0 PeopleBook*, "Using Enrollment Web Services."

**Student Planner** Enter a range of dates to control the availability of this term for use on the student self-service My Planner.

### **See Also**

[Chapter 9, "Defining Dynamic Academic Calendars," page 175](#)

*PeopleSoft Student Financials 9.0 PeopleBook*, "Refunding Customers"

PeopleSoft Human Resources Management System documentation

## **Defining Sessions**

Access the Session Table page (Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Session Table).

Term Table	Session Table	Session Time Periods
<b>Academic Institution:</b>	PSUNV	PeopleSoft University
<b>Academic Career:</b>	BUSN	Graduate Business
<b>Term:</b>	0505	2003 Fall
Find   View All First 1 of 1 Last		
<b>*Session:</b>	1	Regular Academic Session
<b>Enrollment Control Session:</b>		
<b>*Holiday Schedule:</b>	PSS	Academic Holiday Schedule
<b>Use Dynamic Class Dates:</b>	<input type="checkbox"/>	
<b>*Begin Date:</b>	08/27/2003	<b>*End Date:</b> 12/16/2003
<b>First Date to Enroll:</b>	04/14/2003	<b>Last Date to Enroll:</b>
<b>*Open Enrollment Date:</b>	07/01/2003	<b>Last Date for Wait List:</b> 08/01/2003
<b>Weeks of Instruction:</b>	15	<b>Census Date:</b>
<b>Sixty Percent Point in Time:</b>	10/30/2003	<b>Facility Assignment Run Date:</b>

Session Table page

**Important!** After the open enrollment period of the academic institution begins, the system holds the student to the enrollment limits for the session rather than the enrollment limits for the appointment. The enrollment limit for a session is defined on the Academic Program Table page; the appointment limit is defined on the Appointment Limits Table page in the Term/Session Table component.

## Session

Enter the type of session that you are defining for the term. To schedule open entry/exit (OEE) class sections for a course within the specified academic institution, academic career, and term combination, you must define one OEE session per combination. The system restricts the scheduling of classes within an OEE session to only the courses available in OEE format, as defined on the Offerings page of the Course Catalog component.

When you define an OEE session, the system automatically selects the Use Dynamic Class Dates check box and makes it unavailable, because the calculation of dynamic class data for an OEE class section requires the use of the Dynamic Class Dates feature. The system also makes several date fields unavailable because the dates do not apply to OEE class sections.

You can modify these translate values and their descriptions, with the exception of *OEE*, for which you can modify the descriptions only. Any modification to this code requires substantial programming.

<b>Enrollment Control Session</b>	<p>Enter an enrollment control session to limit to a single session's enrollment limit the number of units that a student can take for all sessions within a term.</p> <p>For example, suppose that the following three sessions and corresponding enrollment unit limits exist for the fall term: a regular session with an 18-unit limit, a 12-week session with a 6-unit limit, and a 6-week session with a 3-unit limit. To limit the total number of units that a student can take in all three sessions to 18 units, make the regular session the enrollment control session. This limits the student to a maximum of 18 units in the fall term—regardless of the session in which the student registers for courses. The system still enforces enrollment limits for individual sessions. In this example, a student can take a maximum of only 6 units for the 12-week session and 3 units for the 6-week session. However, if a student takes the maximum units for the 12-week and 6-week sessions, the system limits the student to 9 units in the regular session because the student cannot exceed 18 units for all three sessions.</p>
<b>Holiday Schedule</b>	<p>Enter the holiday schedule for the session. Define holiday schedule values on the Holiday Schedule Table page in HRMS.</p>
<b>Use Dynamic Class Dates</b>	<p>Select to enable the Dynamic Class Dates feature for all classes scheduled within the session.</p>
<b>Begin Date and End Date</b>	<p>Enter the default begin and end date for classes offered in the session. When you define class sections, the system migrates the session begin and end dates to the class start and end dates on the Basic Data page of the Schedule New Course component. You can override these dates for the class section.</p> <hr/> <p><b>Warning!</b> The system does not validate against term begin and end dates. Session begin and end dates can extend beyond the boundaries of the begin and end dates of the term.</p> <hr/>
<b>First Date to Enroll and Last Date to Enroll</b>	<p>Enter the first and last dates on which students can enroll in classes for the specified session. The enrollment engine prevents students from enrolling in classes before the date that you specify. This field is required for OEE sessions but optional for all other sessions. The first date to enroll must be on or before the start date of the first enrollment appointment within the session. The last date to enroll must be on or after the end date of the last enrollment appointment within the session.</p>
<b>Open Enrollment Date</b>	<p>Enter the date on which students can perform enrollment functions in the session, term, and academic career combination without having an enrollment appointment. The open enrollment date is tied to the academic career of the course as defined in the Course Catalog component. For example, if the academic career, term, and session combination is graduate, fall, and regular, then the open enrollment date affects the courses defined under the graduate career in the course catalog for this session.</p>

<b>Last Date for Wait List</b>	Enter the final date on which a student can be placed on a wait list for the session. The enrollment engine assigns a student to the wait list for a class if the class is full and the user selects the Wait List Okay check box for the enrollment request.
<b>Weeks of Instruction</b>	Enter the standard number of weeks of instruction for classes offered in the session. The Instructor Workload feature in Student Records uses this value when calculating faculty workload. Financial Aid uses this value when building terms and projections.
<b>Census Date</b>	Enter the cutoff date for census statistics for the session. This field is for informational purposes only.
<b>Sixty Percent Point in Time</b>	Enter the date on which you consider the session to be 60 percent complete. The system uses this date when computing refunds. In the U.S., most academic institutions stop issuing refunds at this point.
<b>Facility Assignment Run Date</b>	Enter the run date of the facility assignment if you are using the Universal Algorithm Schedule25 and Resource25 software to assign facilities to classes. This assists you in assigning facilities during class scheduling.

**See Also**

[Chapter 9, "Defining Dynamic Academic Calendars," page 175](#)

*PeopleSoft Student Financials 9.0 PeopleBook, "Refunding Customers"*

**Defining Session Time Periods**

Access the Session Time Periods page (Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Session Time Periods).

Term Table		Session Table		Session Time Periods	
<b>Academic Institution:</b>	PSUNV	PeopleSoft	University		
<b>Academic Career:</b>	BUSN	Graduate	Business		
<b>Term:</b>	0505	2003	Fall		
				Find	View All
				First	1 of 1
				Last	
<b>Session:</b>	1	Regular Academic Session			
				Find	First
				1-3 of 3	
				Last	
<b>*Time Period</b>				<b>*End Date</b>	
110	End of First Week			09/02/2003	+ -
150	Mid-Session			10/14/2003	+ -
400	End of Grading Period			12/18/2003	+ -

Session Time Periods page

**Important!** If you do not enter any time periods on this page and the enrollment functions security points to specific time periods, then the system denies access to enrollment functions.

### Session Time Periods

#### Time Period

The system uses time periods for enrollment security to secure access to various enrollment functions. Enter a time period to enforce deadlines for performing enrollment access functions.

For example, at PSUNV, the enroll-function deadline for the advisors enrollment access ID (ADV) is set time period 110, so that advisors can enroll students in classes through the first week of classes. To enforce this deadline for fall 2003 undergraduate enrollment in the regular session, PSUNV defines time period 110 in this field and enters in the End Date field a date equal to the end of the first week of the regular session.

#### End Date

Enter the date on which the time period ends for the session. Only one time period in the session is active at a time.

Many of the dates required affect more than one area of Campus Solutions, such as withdrawal dates. Keep in mind that the Student Financials, Financial Aid, and Student Records applications all must use dates that match the dates set here.

#### See Also

[Chapter 16, "Securing Student Records," Setting Up Enrollment Access IDs, page 300](#)



## Chapter 8

# Defining Traditional Academic Calendars

This chapter provides an overview of academic calendars and enrollment request processing for drops, and discusses how to define traditional academic calendars.

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## Understanding Academic Calendars

Academic calendars are systems by which you define the landmark dates that drive much of the day-to-day business at the academic institution. Each academic calendar contains cancel, withdrawal, and drop deadlines along with other landmark dates that vary, depending on the academic calendar type. As you define academic calendars, it is important to consider how the dates in these calendars affect all of the business processes (such as class enrollment, tuition refunds, and statistical reporting). All applications in Campus Solutions use the academic calendar dates in many of their business processes.

Campus Solutions enables you to create two types of academic calendars. The type that you create depends on the academic structure and business needs of the academic institution. For a traditional approach, you can create academic calendars with static landmark dates based on the term and session structure. For a flexible approach, you can create academic calendars with which you dynamically calculate landmark dates for individual classes *or* students.

A traditional academic calendar is based solely on term and session structure. For each academic career at the academic institution, you must define at least one academic calendar. Thus, you can potentially have as many academic calendars as you have academic careers. For each academic calendar, you must define the cancel, withdrawal, and drop deadlines for each session within each term of an academic career. Because each academic career within an academic institution has its own academic calendar, you can define different landmark dates for each academic career. To associate a traditional academic calendar with a student, you must activate the student into a term within the student's academic career, which in turn ties the appropriate academic calendar to the student. Thus, the dates on the academic calendar for that academic career and term combination drive the student's academic program. Academic calendars are a prerequisite to term activation. You use the Academic Calendar component to define traditional academic calendars, based on the term and session structure.

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**Note.** If you use dynamic academic calendars, you must still set up traditional academic calendars for academic career and term combinations to activate students into terms and to enter landmark dates that dynamic academic calendars do not define.

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## Understanding Enrollment Request Processing for Drops

When processing enrollment requests with an enrollment action of drop through the Quick Enroll, Enrollment Request, and Block Enroll components or through self-service, the enrollment engine must determine the drop deadlines, reasons, grading bases, and grades with which to update the impacted student enrollment records (STDNT\_ENRL).

The enrollment engine determines drop deadlines, grading bases, and grades differently depending on the class enrollment type (traditional, dynamic date, open entry/exit).

When requesting to drop a *traditional class enrollment*, the enrollment engine:

- Determines the deadlines according to the values set on the Academic Calendar 2 page.
- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

If no grade is set on that page, then the enrollment engine uses the grading schemes and grades set on the Session Calendar 2 page.

When requesting to drop a *dynamic date class enrollment*, the enrollment engine:

- Determines the deadlines according to the values that the Dynamic Class Dates COBOL/SQL process (SRDYNADT and SRPCDYNP) calculates and displays on the Dynamic Class Data page.

If you have not calculated the academic calendar dates for the class, the enrollment engine determines the deadlines according to the values set on the Academic Calendar 2 page.

- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

If no grade is set on that page and you have calculated the academic calendar dates for this class, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If no grading scheme and grade are set on that page, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

If no grade is set on that page and you have *not* calculated the academic calendar dates for this class, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

When requesting to drop an *OEE class enrollment*, the enrollment engine:

- Determines the deadline, according to the values that it calculates upon enrollment, and displays it on the Student Enroll OEE page.

If the deadlines have not been calculated, the request fails.

- Determines, if applicable, the grading scheme and grade according to the value set on the Grading Scheme Table page.

If no grade is set on that page, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If no grading scheme and grade are set on that page, the request fails.

Regardless of the class enrollment type, the enrollment engine determines the reason according to the enrollment action reason that you enter on the enrollment processing page. If you do not enter a value on the enrollment processing page, then, for drop transactions during the drop retain record period only, the enrollment engine uses the reason set on the Session Calendar 2 page. Otherwise, the engine assigns no reason.

If the institution wants to retain student enrollment records during the drop delete period, you can associate time periods to enrollment action reasons on the Enrollment Action Reason Table page. When you create an enrollment request with an enrollment action of drop, you can then select an enrollment action reason that has a time period associated with it. For these requests to drop that are during the drop delete period, the enrollment engine retains the impacted student enrollment records so long as the time period has not passed.

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**Note.** The enrollment engine does not prevent enrollment request transactions after the drop deadlines. If you submit a request to drop after the latest drop deadline, the enrollment engine displays a message that the latest drop deadline has passed and continues with the processing.

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## Defining Traditional Academic Calendars

To set up traditional academic calendars, use the Academic Calendar component (ACAD\_CALENDAR\_TBL). Use the SSR\_ACAD\_CALENDAR\_TBL component interface to load the data into the table for this component interface.

This section discusses how to:

- Describe academic calendars.
- Set up term landmark dates.
- Define self-service graduation terms.
- Set up session cancellation and withdrawal dates.
- Set up session drop dates.

## Pages Used to Define Traditional Academic Calendars

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Term Calendar 1	ACAD_TERM_CAL1	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 1	Describe academic calendars for an academic career.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Term Calendar 2	ACAD_TERM_CAL2	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 2	Dates on this page are informational only and are not required. When you perform a term withdrawal or cancellation, the Stud Records Term Withdrawal COBOL/SQL process (SRPCWDPR) uses dates defined for the session, not the term.
Term Calendar 3	ACAD_TERM_CAL3	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 3	Set up term landmark dates for students who are active in the specified term for the specified academic career. These landmark dates are for class enrollment, graduation, statistical reporting, and transcript purposes.
Term Calendar 4	ACAD_TERM_CAL4	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 4	Define valid graduation application dates for each term. The system uses the date range to control the values that students can enter in the Expected Graduation Term field on the Apply for Graduation – enter Graduation Term page.
Session Calendar1	ACAD_SESN_CAL2_TBL	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Session Calendar 1	Set up the class cancellation and withdrawal deadlines and data that the Stud Records Term Withdrawal process uses when a student cancels or withdraws from a term or session within a specified academic career.
Session Calendar2	ACAD_SESSN_CAL_TBL	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Session Calendar 2	Set up the session drop deadlines that the enrollment engine uses when a student drops a class within a particular session of an academic career.

## Describing Academic Calendars

Access the Term Calendar 1 page (Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 1).

**Academic Calendar**

Enter a code that represents this academic calendar. If you have multiple academic careers that use the same academic calendar, set up the academic calendar for each of those academic careers, entering the same academic calendar code for each academic career.

**Setting Up Term Landmark Dates**

Access the Term Calendar 3 page (Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 3).

Term Calendar 1	Term Calendar 2	Term Calendar 3	Term Calendar 4	Session Calendar1	Session Calendar2
<b>Academic Institution:</b>		PSUNV	PeopleSoft University		
<b>Academic Career:</b>		BUSN	Graduate Business		
<b>Academic Calendar:</b>		BUSN	Graduate Business		
<b>Term:</b>		0522	2004 Summer		
<b>Confer Date:</b>			08/31/2004		
<b>Census Date:</b>			07/10/2004		
<b>*Fully Enrolled Date:</b>			05/25/2004		
<b>*Show Enrollment on Transcript:</b>			05/25/2004		
<b>*Show Statistics on Transcript:</b>			05/25/2004		
<b>*Fully Graded Date:</b>			08/30/2004		
<b>Student Attribute Value for Cohort:</b>			<input type="text"/>		

Term Calendar 3 page

**Confer Date**

Enter the degree conferral date that the system uses for students who are active in the specified term for the specified academic career and are graduating at the end of the specified term. The system uses this date when you post degrees.

**Census Date**

Enter the official cutoff date for census statistics for the term.

**Fully Enrolled Date**

Enter the date on which the students who are active in the specified term for the specified academic career are considered fully enrolled in the specified term. As of this date, the students' coursework appears on their transcripts when you enter the Obey Enrollment on Transcript Date check box on the Enrollment/Statistics page of the Transcript Type component. This date is also used for financial aid load calculations and billing purposes.

<b>Show Enrollment on Transcript</b>	Enter the date on which the in-progress enrollment appears on transcripts for students who are active in the specified term for the specified academic career. When you define transcript types, you can indicate on the Transcript Type – Basic Data page whether the transcript processes should obey this date and display in-progress enrollment information.
<b>Show Statistics on Transcript</b>	Enter the date on which academic statistics appear on transcripts for students who are active in the specified term for the specified academic career. When you define transcript types, you can indicate on the Transcript Type - Basic Data page whether the transcript processes should obey this date and display term statistics.
<b>Fully Graded Date</b>	Enter the date on which the system considers a student fully graded. The student must be active in the specified term for the specified academic career. The system populates this value by default for students on the Term Control Dates page in the Term Activation component. In addition, the system populates this value by default to the STDNT_CAR_TERM record when you run the Term Activation process or the Term Activation Update SQR process (SRTRMAC). When you define transcript types, you can indicate on the Transcript Type - Enrollment Statistics page whether the transcript processes should obey this date and only display classes considered fully graded. In other words, the system prints only those classes with fully graded dates less than or equal to the run date.
<b>Student Attribute Value for Cohort</b>	Currently not in use.

## Defining Self-Service Graduation Terms

Access the Term Calendar 4 page (Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 4).

### See Also

*PeopleSoft Campus Self Service 9.0 PeopleBook*, "Using Self-Service Degree Progress/Graduation," Applying for Graduation Using Self-Service Pages

## Setting Up Session Cancellation and Withdrawal Dates

Access the Session Calendar 1 page (Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Session Calendar 1).

Term Calendar 1	Term Calendar 2	Term Calendar 3	Term Calendar 4	Session Calendar 1
<b>Academic Institution:</b> PSUNV PeopleSoft University				
<b>Academic Career:</b> BUSN Graduate Business				
		Find   View All First 1 of 1 Last		
<b>Academic Calendar:</b> BUSN Graduate Business				
		Find   View All First 1 of 29 Last		
<b>Term:</b> 0530 2004 Fall				
		Find   View All First 1 of 1 Last		
<b>*Session:</b> 1 Regular Academic Session		+ -		
<b>Cancel</b>				
<b>Deadline:</b> 09/07/2004	<b>Reason:</b> Term Cancellation			
<b>Withdraw without Penalty</b>				
<b>Deadline:</b> 09/20/2004	<b>Reason:</b> Term Withdrawal			
<b>Withdraw with Penalty</b>				
<b>Deadline:</b> 10/04/2004	<b>Grd Basis:</b> GRD	<b>Grade:</b> W		
<b>Withdraw with Greater Penalty</b>				
<b>Deadline:</b> 10/11/2004	<b>Grd Basis:</b> GRD	<b>Grade:</b> WF		

Session Calendar1 page

**Note.** For academic institutions that offer an open entry/exit (OEE) session for a term, you are not required to define an OEE session calendar because the cancel, withdraw, and drop information is part of the Open Entry/Exit Dynamic Date rule.

<b>Session</b>	Enter the session within the term for which you want to define the specified academic calendar for the specified academic career.
<b>Cancel</b>	
<b>Deadline</b>	Enter the last date on which students within the specified academic career can cancel their enrollment in a class for this session. Penalty grades are not assigned to cancellations.
<b>Reason</b>	Select the reason value that you want the Student Records Term Withdrawal process to assign to affected student enrollment records.

***Withdraw without Penalty***

<b>Deadline</b>	Enter the last date on which students within the specified academic career can withdraw from a class within this session without any grade point average (GPA) penalty.
<b>Reason</b>	Enter the reason value that you want the Student Records Term Withdrawal process to assign to affected student enrollment records.

***Withdraw with Penalty***

<b>Deadline</b>	Enter the last date on which students within the specified academic career can withdraw from a class within this session with penalty. If a student withdraws from the class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline, the class appears on the student's transcripts and affects the student's GPA in proportion to the value of the withdraw-with-penalty grade. The refund effect is based on the refund dates and periods, as defined within Student Financials.
<b>Grd Basis</b> (grading basis)	Enter the grading basis from which you want to select the withdraw-with-penalty grade.
<b>Grade</b>	Enter the grade that students within the specified academic career receive for a class within this session if the student withdraws after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

***Withdraw with Greater Penalty***

<b>Deadline</b>	Enter the last date on which students within the specified academic career can withdraw from a class within this session with greater penalty. If a student withdraws from the class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline, the class appears on the student's transcripts and affects the student's GPA in proportion to the value of the withdraw-with-greater-penalty grade. The refund impact is based upon the refund dates and periods as defined within Student Financials.
<b>Grd Basis</b> (grading basis)	Enter the grading basis from which you want to choose the withdraw-with-greater-penalty grade.
<b>Grade</b>	Enter the grade that students within the specified academic career receive for a class within this session if they withdraw from the class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.



**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Grading," Defining Grading Schemes

*PeopleSoft Student Records 9.0 PeopleBook*, "Using Enrollment-Related Processes," Understanding Withdrawal and Cancellation Processing

*PeopleSoft Student Financials 9.0 PeopleBook*, "Refunding Customers"

**Setting Up Session Drop Dates**

Access the Session Calendar 2 page (Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Session Calendar 2).

Term Calendar 2		Term Calendar 3		Term Calendar 4		Session Calendar 1		<b>Session Calendar 2</b>	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University							
<b>Academic Career:</b>	BUSN	Graduate Business							
				Find   View All		First		1 of 1 Last	
<b>Academic Calendar:</b>	BUSN	Graduate Business							
				Find   View All		First		1 of 29 Last	
<b>Term:</b>	0530	2004 Fall							
				Find   View All		First		1 of 1 Last	
<b>Session:</b>	1	Regular							
<b>Drop (Delete Record)</b>									
<b>Deadline:</b>	09/07/2004			<b>*Fully Enrolled Date:</b>	08/30/2004				
<b>Drop (Retain Record)</b>									
<b>Deadline:</b>	09/20/2004	<b>Reason:</b>	Student Dropped Class						
<b>Drop with Penalty</b>									
<b>Deadline:</b>	10/04/2004	<b>Grd Basis:</b>	GRD	<b>Grade</b>	W				
<b>Drop with Greater Penalty</b>									
<b>Deadline:</b>	10/11/2004	<b>Grd Basis:</b>	GRD	<b>Grade</b>	WF				

Session Calendar2 page

***Drop (Delete Record)*****Deadline**

Enter the last date on which students within the specified academic career can drop a class within the specified session and have their enrollment record for the class deleted from the student enrollment table (STDNT\_ENRL). The dropped class does not have any GPA penalty. The refund impact is based upon the refund dates and periods as defined within Student Financials. When you are using one of the enrollment pages to drop a student from a class during this period and you add an enrollment action reason, the enrollment engine automatically retains the student enrollment record.

**Fully Enrolled Date**

Enter the date on which the students who are active in the specified session for the specified academic career are considered fully enrolled in the specified session. As of this date, the students' coursework appears on their transcripts. This date is also used for financial aid load calculations and billing purposes.

***Drop (Retain Record)*****Deadline**

Enter the last date on which students within the specified academic career can drop from a class within the specified session without having the class appear as a drop on their transcripts and without any GPA penalty. If a student drops a class *after* the drop-and-delete-record deadline but *on or before* the drop-and-retain-record deadline, the system retains the student's enrollment record, sets the record to dropped status, and designates the reason. The refund impact is based upon the refund dates and periods as defined within Student Financials.

**Reason**

Select the default reason for the class drop. You can modify these translate values.

***Drop with Penalty*****Deadline**

Enter the last date on which students within the specified academic career can drop a class within the specified session without having any GPA penalty. If a student drops the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline, the system retains the student's enrollment record, leaves the record as enrolled status, and assigns the drop-with-penalty grade that you specify on this page. The refund impact is based upon the refund dates and periods as defined within Student Financials.

**Grd Basis (grade basis)**

Enter the grading basis from which you want to choose the drop-with-penalty grade.

**Grade** Enter the penalty grade that students within the specified academic career receive for a class within the specified session if they drop the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

### ***Drop with Greater Penalty***

**Deadline** To specify a greater level of penalty, enter the last date on which students within the specified academic career can drop a class within the specified session without greater penalty. If a student drops the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline, the system retains the student's enrollment record, leaves the record as enrolled status, and assigns the drop-with-greater-penalty grade that you specify on this page. The refund impact is based upon the refund dates and periods as defined within Student Financials.

**Grd Basis** (grade basis) Enter the grading basis from which you want to choose the drop-with-greater-penalty grade.

**Grade** Enter the grade that students within the specified academic career receive for a class within the specified session if they drop the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

### **See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Grading," Defining Grading Schemes

*PeopleSoft Student Records 9.0 PeopleBook*, "Processing Class Enrollment Transactions"



## Chapter 9

# Defining Dynamic Academic Calendars

This chapter provides an overview of dynamic academic calendars and discusses how to:

- Create dynamic class date rules.
- Set up dynamic class dates.
- Calculate dynamic academic calendars by term.
- Manage dynamic academic calendars for class sections.
- Manage dynamic academic calendars for open entry/exit enrollments.

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## Understanding Dynamic Academic Calendars

If you use the traditional way to design an academic structure in PeopleSoft Student Records, you define the terms, sessions, and academic calendars that control the various academic programs. You use these three elements to determine the significant dates and time periods within each session. For example, you use the academic calendar to set up drop and withdrawal deadlines for each session. However, this academic structure can be limiting.

A dynamic academic calendar provides more flexibility than static landmark dates based on term and session structure. This type of calendar enables you to dynamically control landmark dates for individual classes and even for student enrollments themselves. You might use dynamic academic calendars, for instance, if the academic institution has a rolling admission and enrollment business process that enables students to begin academic programs at any point in the calendar year. In this case, many classes that you offer might use their own academic calendars because the classes have their own deadlines and landmark dates. You can also use dynamic academic calendars if the academic institution offers students open entry enrollment into classes so that the students can enroll at any time during the calendar year and complete the classes at their own pace. Many classes taught over the internet use this type of enrollment, which is called *open entry/exit* (OEE) enrollment.

In a dynamic academic calendar, you establish flexible rules, called *dynamic class date rules*, which enable you to dynamically calculate cancel, withdrawal, and drop deadlines and other landmark dates. You then apply these rules to various parts of the academic structure so that you can calculate the landmark calendar dates for individual classes or student enrollments. You can override the calculations on a case-by-case basis. Consequently, the academic institution can create classes that begin and end at various times throughout a term and session, then dynamically calculate the landmark dates for individual classes based on the dynamic date rules that you assign to classes. In addition, the academic institution can set up OEE enrollment for these classes with dynamic dates so that the enrollment engine calculates landmark dates for each student who enrolls in one of the classes based on the student's enrollment begin date and the OEE dynamic date rule that you assign to the class.

Use the Dynamic Class Dates feature to create dynamic academic calendars for individual classes within a session and for individual OEE student enrollments.

To create dynamic academic calendars:

1. Create dynamic date rules.
2. Set up the academic structure.
3. Schedule the class sections for which you want to create dynamic academic calendars.
4. Calculate landmark date deadlines for the dynamic academic calendars using the Dynamic Class Dates COBOL/SQL process (SRPCDYNP).

You can calculate these deadlines in several ways. For multiple class sections within a term, use the Dynamic Class Dates process page. For individual class sections, use the Dynamic Class Data page. For OEE enrollments, the enrollment engine runs the Dynamic Class Dates process at enrollment time for each student who enrolls in an OEE class section, and the system calculates the deadlines.

---

**Warning!** Because the Dynamic Dates Process creates the Dynamic Class Dates table, which the system uses for enrollment transactions, you *must* run the process for classes scheduled in a dynamic date session before you perform enrollment transactions. If you do not run the process, the system has no indication that a rule exists and it might, for example, permit all class drops. This warning does not apply to classes scheduled in OEE sessions.

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### ***Dynamic Date Rules***

The Dynamic Dates COBOL/SQL process (SRDYNADT and SRPCDYNP) uses a dynamic class date rule to calculate deadlines for landmark dates on the dynamic academic calendars that the process creates. There are two types of dynamic class date rules. The first type, a *dynamic class date rule*, is used to create dynamic academic calendars for individual class sections within a session. The second type, an *OEE dynamic date rule*, is a dynamic class date rule that is designated for open OEE enrollment. The enrollment engine uses the OEE dynamic date rule in conjunction with students' enrollment start dates to calculate dynamic academic calendars for the students whenever they enroll in OEE classes. Regardless of the type of rule that you define, for each rule you must specify the rule schemes, rounding schemes, and factors that the Dynamic Class Dates process uses to calculate the landmark dates on a dynamic academic calendar.

You define a *rule scheme* for the landmark date of a dynamic class date rule. A rule scheme indicates the method that the Dynamic Class Dates process uses as a basis for calculating the applicable landmark date. Your selection varies depending on the type of rule that you define. All rule schemes are valid for dynamic class date rules, but rule schemes that relate to class meetings are invalid for OEE dynamic date rules because of the nature of OEE classes.

You can define rule schemes based on these factors:

- The number of class meetings.
- A percentage of class meetings.
- A percentage of total class hours.
- A point between class start and end date (OEE).
- The day before or after class start date (OEE).
- The day before or after class end date (OEE).

Then, you define a *rounding scheme* for the landmark date of the dynamic class date rule. A rounding scheme enables you to round the deadline up or down to various days. After the Dynamic Class Dates process determines the landmark date according to the rule scheme and factor (known as the *basis day*), it adjusts that date according to the rounding scheme. All rounding schemes are valid for dynamic class date rules, but rounding schemes that relate to class meetings are invalid for OEE dynamic date rules because of the nature of OEE classes.

You can define rounding schemes that use these days:

- Basis day (OEE)
- Beginning of next week (OEE)
- Beginning of week (OEE)
- End of next week (OEE)
- End of week (OEE)
- First meeting of week
- Last meeting of week
- Next day (OEE)
- Next meeting day
- Previous day (OEE)
- Previous meeting day

You must also define a *factor* for the landmark date of the dynamic class date rule. A factor instructs the Dynamic Class Dates process how many units to move the deadline either forward or backward, based on the rule scheme. For example, if you use the percentage of class meetings for the rule scheme and you want the deadline to be at the halfway point of the class, you would enter *.50* (fifty percent).

The Dynamic Class Dates process uses the rule scheme and factor to determine the basis day. If the rule scheme uses the number of class meetings, a percentage of class meetings, a percentage of total class hours, or a point between class start and end date (for non-OEE classes), then the basis day is the class meeting with the maximum value that does not exceed the specified factor. After the Dynamic Class Dates process determines the basis day, it applies the rounding scheme to the basis day to determine the deadline. If the rule scheme uses a point between class start and end date (OEE classes), the day before or after class start date, or the day before or after class end date, then the basis day is the actual calculated date.

### **Examples of Dynamic Class Date Rules**

This section discusses examples of how the Dynamic Dates process calculates deadlines for a dynamic academic calendar.

Suppose that you schedule a class that meets every Wednesday for 7 weeks starting March 4. In the Last Wait List Date group box on the Dynamic Class Dates page, you enter *Percentage of Class Meetings* as the rule scheme and *Beginning of Next Week* as the rounding scheme. You also set the factor to *.30* (thirty percent). The Dynamic Class dates process would calculate the last wait list date as shown in this table:

<b>Meeting</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>
Date	March 4	March 11	March 18	March 25	April 1	April 8	April 15
Percentage	14%	28%	43%	57%	71%	86%	100%

Based on the rule scheme and factor, the basis day would be the second meeting. By using the basis day as a starting point, the process then rounds the deadline up or down based on the rounding scheme that you specify. In this example, the last day to waitlist the class would be Monday, March 16, which is the beginning of the next week.

This table shows other possible deadlines in this example, depending on the rounding scheme that you enter:

<b>Last Wait List Date Rounding Scheme</b>	<b>Last Wait List Date Deadline</b>
Basis day.	March 11
Previous day.	March 10
Next day.	March 12
Next meeting day.	March 18
Beginning of week (Monday).	March 9
Previous meeting day.	March 4
Beginning of next week (next Monday).	March 16

Because the system dynamically calculates the landmark dates of the academic calendar, you can apply the same rule to any number of classes.

To further illustrate how the system uses the dynamic class date rule that you create, suppose that you have a 10-week class that meets once a week, starting January 1. In the Drop Dates group box on the Dynamic Class Dates page, you select a rule scheme of *Number of Class Meetings* and a rounding scheme of *Basis Day*. You have four drop deadlines—drop and delete record, drop but retain record, drop with penalty, and drop with greater penalty. The consequence of violating each deadline becomes more severe as time passes. Suppose that you want these deadlines to occur a week apart, starting the second week of class. You would enter 2 in the Drop Deadline (delete) Factor field, 3 in the Drop Deadline (retain) Factor field, 4 for the Drop Deadline (Penalty) Factor field, and 5 for the Drop Deadline (Penalty2) Factor field.

After you save the rule and assign it to the appropriate class, the Dynamic Class Dates process can dynamically calculate each of these drop deadlines for the class. According to the rule scheme and factors that you specified, the process calculates the basis day for each of the drop deadlines as January 8, January 15, January 22, and January 29. In this scenario, because you have used a basis day rounding scheme, the process determines that the drop deadlines are the same as the dates for the basis days.



## Creating Dynamic Class Date Rules

To set up dynamic class date rules, use the Dynamic Class Dates component (DYN\_CLASS\_TBL).

This section discusses how to establish dynamic class date rules.

### Page Used to Create Dynamic Class Date Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Dynamic Class Dates	DYN_CLASS_DATA_TBL	Set Up SACR, Product Related, Student Records, Curriculum Management, Dynamic Class Dates, Dynamic Class Dates	Establish dynamic class date rules and OEE dynamic date rules for an academic institution. Rules enable you to dynamically calculate cancel, withdrawal, and drop deadlines and other landmark dates. You then apply these rules to various parts of the academic structure so that you can calculate the landmark calendar dates for individual classes or student enrollments.

### Establishing Dynamic Class Date Rules

Access the Dynamic Class Dates page (Set Up SACR, Product Related, Student Records, Curriculum Management, Dynamic Class Dates, Dynamic Class Dates).

## Dynamic Class Dates A factor of 9999 excludes a date from the calculation process.

Find | View All
First ◀ 1 of 1 ▶ Last

<b>Academic Institution:</b>	PSUNV	PeopleSoft University	+ -
<b>Dynamic Class Date Rule:</b>	OEE15WK-1	<input checked="" type="checkbox"/> Use for OEE	
<b>*Effective Date:</b>	01/01/1900 <small>BT</small>	<b>*Status:</b>	Active ▼
<b>*Description:</b>	OEE 15 Week Schedule		
<b>*Short Description:</b>	OEE15WK-1		

**Last Date to Drop**

<b>Rule:</b>	<input type="text"/>		🔍
<b>Rounding Scheme:</b>	<input type="text"/>		🔍
<b>Factor:</b>	<input type="text" value="9999.000"/>		

**Drop Action Dates**

<b>*Rule:</b>	S 🔍	Days before/after Class Start	
<b>*Rounding Scheme:</b>	EW 🔍	End of Week	
<b>Delete Factor:</b>	<input type="text" value="7.000"/>	<b>Retain Factor:</b>	<input type="text" value="14.000"/>
<b>Penalty Factor:</b>	<input type="text" value="21.000"/>	<b>Penalty2 Factor:</b>	<input type="text" value="9999.000"/>

**Cancel & Withdrawal Dates**

<b>*Rule:</b>	S 🔍	Days before/after Class Start	
<b>*Rounding Scheme:</b>	EW 🔍	End of Week	
<b>Cancel Factor:</b>	<input type="text" value="7.000"/>	<b>WD w/o Penalty:</b>	<input type="text" value="14.000"/>
<b>WD w/ Penalty:</b>	<input type="text" value="21.000"/>	<b>WD w/ Penalty2:</b>	<input type="text" value="9999.000"/>

Dynamic Class Dates page (1 of 2)

Class End Date		
Rule:	WK 	Weeks
Rounding Scheme:	EW 	End of Week
Factor:	<input type="text" value="15.000"/>	
Fully Graded Date		
Rule:	E 	Days before/after Class End
Rounding Scheme:	EW 	End of Week
Factor:	<input type="text" value="14.000"/>	
Lapse Start Date		
Rule:	E 	Days before/after Class End
Rounding Scheme:	EW 	End of Week
Factor:	<input type="text" value="90.000"/>	
Sixty Percent Point in Time		
Rule:	B 	Point Between Class Start-End
Rounding Scheme:	EW 	End of Week
Factor:	<input type="text" value="0.600"/>	
Census Date		
Rule:	B 	Point Between Class Start-End
Rounding Scheme:	EW 	End of Week
Factor:	<input type="text" value="0.200"/>	

Dynamic Class Dates page (2 of 2)

**Use for OEE** (use for open entry/exit)

Select to make this dynamic class date rule applicable *only* to OEE class sections. This option distinguishes the rule as an OEE dynamic date rule. Clear the check box to make the dynamic class date rule applicable only to regular dynamically dated class sections. Depending on your selection, the dates for which you must define rules, rounding schemes, and factors vary according to individual needs, as do the translate values for the Rule and Rounding Scheme fields. You *must* enter a value for this check box before defining rule schemes, rounding schemes, and factors.

### ***Last Date to Drop***

In the Last Date to Drop group box, enter the rule scheme, rounding scheme, and factors that the Dynamic Dates process uses to calculate the last drop date for classes or OEE enrollments to which this rule applies.

### ***Drop Action Dates***

In the Drop Dates group box, enter the rule scheme, rounding scheme, and factors that the Dynamic Dates process uses to calculate the drop deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the drop-and-retain-record deadline and the grade for the drop-with-penalty deadlines according to the student's primary academic program. Define reason codes and grades for drops by academic program on the Dynamic Date page of the Academic Program Table component.

### ***Cancel & Withdrawal Dates***

Enter the rule scheme, rounding scheme, and cancel factor that the Dynamic Class Dates process uses to calculate the cancel and withdrawal date deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the cancellation, and the grade for the withdraw-with-penalty deadlines, according to the student's academic program. Define reason codes and grades for withdrawals by academic program on the Dynamic Dates page of the Academic Program Table component.

### ***Lapse Start Date***

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the lapse start date for classes or OEE enrollments to which this rule applies. The lapse start date is the first date on which a student's grade lapses. This date determines when the grade lapse rules go into effect for students.

### ***Sixty Percent Point In Time***

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the 60 percent point in time for classes or OEE enrollments to which this rule applies. The 60 percent point in time is the date that you consider the class or OEE enrollment to be 60 percent complete. The system uses this date when computing refunds. In the U.S., the majority of academic institutions stop issuing refunds at this point in time.

### ***Census Date***

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the census date for classes or OEE enrollments to which this rule applies. The census date is the official cutoff date for census statistics.

### ***Fully Graded Date***

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the date on which a student is considered to be fully graded for classes or OEE enrollments to which this rule applies. This field is optional. When you define transcript types, you can indicate on the Transcript Type – Basic Data page whether the transcript processes uses this date and displays grades for classes within the term.

### ***Class End Date***

Enter the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the end date of a class for OEE enrollments to which this rule applies. This field is unavailable for when you define OEE dynamic date rules.

## See Also

[Chapter 8, "Defining Traditional Academic Calendars," Setting Up Session Drop Dates, page 171](#)

[Chapter 8, "Defining Traditional Academic Calendars," Setting Up Session Cancellation and Withdrawal Dates, page 168](#)

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## Setting Up Dynamic Class Dates

After you create dynamic class date rules, you must set up the Dynamic Class Dates feature within the academic structure so that you can create dynamic academic calendars.

To set up the Dynamic Class Dates feature:

1. On the Academic Career Table page, indicate in the Allow OEE Enrollment field whether by default you permit the scheduling of OEE class sections for all course offerings that you tie to an academic career.

See [Chapter 6, "Designing Your Academic Structure," Defining Academic Careers, page 105](#).

See [Chapter 6, "Designing Your Academic Structure," Describing Academic Career Parameters, page 106](#)

:

2. On the Academic Career Table 2 page, select the Use Dynamic Class Dates check box to make available the Dynamic Date page of the Academic Program Table component.

You use the Dynamic Date page to set up the reasons and penalties for canceling, withdrawing from, and dropping dynamically dated classes. To define a default dynamic class date rule for courses within the academic career, enter the rule in the Dynamic Class Date Rule field. To define a default OEE dynamic class date rule for the courses within the academic career, enter the rule in the OEE Dynamic Date Rule field.

See [Chapter 6, "Designing Your Academic Structure," Setting Additional Academic Career Parameters, page 109](#).

3. On the Program 1 page of the Academic Program Table component, indicate in the Allow OEE Enrollment field whether to permit OEE enrollment for students within a specific academic program.

See [Chapter 6, "Designing Your Academic Structure," Describing Academic Career Parameters, page 106](#)

:

4. On the Dynamic Date page of the Academic Program Table component, set up dynamic date fields for a specific academic program.

This page is available only if you enable the Dynamic Class Dates features on the Academic Career Table 2 page. For students within an academic program to be able to drop or withdraw from OEE classes, you must define the values on the Academic Program - Dynamic Date page.

See [Chapter 10, "Defining Programs, Plans, and Subplans," Setting Up Dynamic Date Fields for Academic Programs, page 214](#).

5. On the Term Table page, select the Use Dynamic Class Dates check box to select the Dynamic Class Dates feature by default for each session created within a term.

See [Chapter 7, "Establishing Terms and Sessions," Defining Terms, page 156.](#)

6. On the Session Table page, select the Use Dynamic Class Dates check box to enable the Dynamic Class Dates feature for all classes that you schedule within a session.

To schedule OEE class sections for a course within a particular academic institution, academic career, and term combination, for each combination you must define one OEE in the Session field.

See [Chapter 7, "Establishing Terms and Sessions," Defining Sessions, page 158.](#)

7. On the Offerings page of the Course Catalog component, in the Dynamic Class Date Rule field, enter the default rule that you want the Dynamic Class Dates process to assign to all class sections of the course offering that you schedule.

To enable students to enroll in OEE class sections of a course offering, select the Allow OEE Enrollment check box. The OEE Dynamic Date Rule field becomes available. Then, enter a default OEE dynamic date rule that the system assigns to all OEE class sections of the course offering that you schedule. If you have assigned a dynamic class date rule or an OEE dynamic date rule on the Academic Career Table 2 page, then the system uses that value in the corresponding field on the Course Catalog - Offerings page when you create a new course catalog record.

See *PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up the Course Catalog," Defining Course Offerings.

8. On the Components page of the Course Catalog component, select the Primary Component check box to indicate the primary component of the course offering.

Also, indicate the additional components that you want the Dynamic Class Dates process to include in its calculations by selecting the Include In Dynamic Date Calc (include in dynamic date calculations) check box for the component.

See *PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up the Course Catalog," Defining Course Components.

9. On the Basic Data page of the Schedule New Course component, select the Include In Dynamic Date Calc check box to also include a non primary component of the class section in the Dynamic Class Dates process calculations.

To schedule OEE class sections, you must enter *OEE* in the Session field. Finish scheduling the class.

See *PeopleSoft Student Records 9.0 PeopleBook*, "Managing the Schedule of Classes," Defining Basic Data for Class Sections.

10. On the Class Components page of the Class Associations component, in the Primary Component field, enter the primary component for the class that you are scheduling.

Because the system takes the value for the primary component from the Course Catalog - Components page, use the Class Associations component only if you are changing the primary component for the term.

See *PeopleSoft Student Records 9.0 PeopleBook*, "Managing the Schedule of Classes," Modifying Class Components.

After you complete the setup for the Dynamic Class Dates feature, you can dynamically calculate the academic calendar landmark dates for classes.

## Creating Dynamic Academic Calendars by Term

This section discusses how to calculate dynamic academic calendars by term.

### Page Used to Calculate Dynamic Academic Calendars by Term

Page Name	Definition Name	Navigation	Usage
Generate Dynamic Class Dates	RUNCTL_SRPCDYNP	Curriculum Management, Dynamic Dates, Generate Dynamic Class Dates, Generate Dynamic Class Dates	Dynamically calculate the academic calendar deadlines for class sections that you have scheduled for a term.

### Calculating Dynamic Academic Calendars by Term

Access the Generate Dynamic Class Dates page (Curriculum Management, Dynamic Dates, Generate Dynamic Class Dates, Generate Dynamic Class Dates).

**Generate Dynamic Class Dates**

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

\*Academic Institution:  PeopleSoft University

\*Term:  2003 Fall Commit Frequency:

Class Nbr	Session	Academic Organization	Campus	Subject Area	Catalog Number From	Catalog Number To	Class Start Date From	Class Start Date To	Obey Dynamic Date Cal Required
1002	Regular	PHILOSOPHY	MAIN	PHILO	106	106	08/27/2003	08/27/2003	<input checked="" type="checkbox"/>

Generate Dynamic Class Dates page

Use the fields in the lower portion of the page to enter the criteria that the Dynamic Class Dates process uses to determine which class sections to process. Enter as many criteria as necessary to include all the class sections for which the system must dynamically calculate academic calendar dates. After the system calculates the deadlines, you can view, override, and recalculate them on a section-by-section basis on the Dynamic Class Data page of the Dynamic Class Dates component.

**Academic Institution** Enter the academic institution for which you want to run the Dynamic Class Dates process for multiple class sections. The system supplies this value from the User Defaults 1 page, but you can override the default value.

**Term** Enter the term that contains the class sections for which you want to run the Dynamic Class Dates process.

<b>Commit Frequency</b>	Enter a commit frequency. Lower commit frequencies provide better concurrence of data. Although higher commit frequencies enable faster job processing, jobs may become busy with other processes. You should retain the default commit frequency or enter <i>1</i> .
<b>Class Nbr</b> (class number)	Enter the class number for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules. The system displays the scheduled classes for the specified term and academic institution. After you enter the class number and exit the field, the system populates the values for the remaining selection criteria. To dynamically calculate academic calendar dates for multiple class sections on this row, leave this field blank.
<b>Session</b>	Enter the session (in the specified term and academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections. You can modify these translate values. To dynamically calculate academic calendar dates for multiple sessions on this row, leave this field blank.
<b>Academic Organization</b>	Enter the academic organization (within the specified academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
<b>Campus</b>	Enter the campus (within the specified academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
<b>Subject Area</b>	Enter the subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
<b>Catalog Number From</b>	Enter the first catalog number in the range if you have a specific range of catalog numbers within a subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
<b>Catalog Number To</b>	Enter the last catalog number in the range.
<b>Class Start Date From</b>	Enter the first class start date in the range if you have a specific range of class start dates for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.
<b>Class Start Date To</b>	Enter the last class start date in the range.



**Obey Dynamic Date Cal Required** (obey dynamic date calculation required)

Select to have the Dynamic Class Dates process include in its calculations only the components of a scheduled class section within a dynamically dated session for which the system has selected the Dynamic Date Cal Required (dynamic date calculation required) field on the Basic Data page of the schedule of classes. The system selects this field whenever you modify the class meeting pattern for a component of a scheduled class section. Clear this check box to have the system calculate academic calendar dates and assign OEE dynamic date rules for all scheduled class sections.

**Run**

Click to run this request. PeopleSoft Process Scheduler runs the Dynamic Class Dates SQL process at user-defined intervals. You can also run the Dynamic Class Dates SQR report (SRDYNADT), or the Dynamic Class Dates multiprocess job, which consists of both the Dynamic Class Dates process and the SQR report. After the process finishes, the system makes the rows that you included in the run request unavailable for editing, but it still displays these rows so that you can review the processing parameters of the run. These rows have no effect on future processing.

---

## Managing Dynamic Academic Calendars for Class Sections

If you have attached the dynamic class date rule directly to the course offering, the Dynamic Class Dates process uses that rule every time that you run the process for a scheduled class section of that course offering. Although this ensures consistency and facilitates maintenance, you might want to apply rules directly to each class section, modify the course offering default rule for specific class sections, or manually enter a deadline for a dynamic academic calendar date. You can use the Dynamic Class Dates component to accomplish these tasks and more. With this component, you can also view the class meeting patterns of class sections and Dynamic Class Date process messages.

This section discusses how to:

- Calculate, view, and override dynamic academic calendar dates.
- View class meeting patterns.
- View dynamic class date process messages.

## Pages Used to Manage Dynamic Academic Calendars for Class Sections

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Dynamic Class Data	DYN_CLASS_DATA1	Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Dynamic Class Data	Run the Dynamic Class Dates process for a class section, or view and override the calculated results.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Class Meeting Pattern	DYN_CLASS_MTG_PAT	Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Class Meeting Pattern	View the class meeting pattern of the class section for which you dynamically calculate academic calendar dates.
Messages	DYN_CLASS_DATA_MSG	Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Messages	View the Dynamic Class Date process status and messages related to each class section for which you have dynamically calculated academic calendar dates.

## Calculating, Viewing, and Overriding Dynamic Academic Calendar Dates

Access the Dynamic Class Data page (Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Dynamic Class Data).

Dynamic Class Data		Class Meeting Pattern		Messages	
<b>Course ID:</b>	002101	<b>Course Offering Nbr:</b>	1		
<b>Academic Institution:</b>	PeopleSoft University				
<b>Term:</b>	2005 Spring		Undergrad		
<b>Subject Area:</b>	PHYSICS		Physics		
<b>Catalog Nbr:</b>	130		General Physics		
<b>Session:</b>	Open Entry/Open Exit		A factor of 9999 excludes a date from the calculation process.		
<a href="#">Calculate Dynamic Dates</a>					
Dynamic Class Dates					
<b>Class Section:</b>	4	Lecture	<b>Class Nbr:</b>	1215	
<b>Associated Class:</b>	4		<b>Event ID:</b>		
<b>Dynamic Class Date Rule:</b>	OEE15WK-1	OEE 15 Week Schedule			
Last Date to Drop					
Rule:	<input type="text"/>				
Rounding Scheme:	<input type="text"/>				
Factor:	9999.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Drop Action Dates					
Rule:	<input type="text"/>				
Rounding Scheme:	<input type="text"/>				
Drop Deadline (delete) factor:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Drop Deadline (retain) factor:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Drop Deadline (Penalty) factor:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Drop Deadline(Penalty2) factor:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Cancel & Withdrawal Dates					
Rule:	<input type="text"/>				
Rounding Scheme:	<input type="text"/>				
Cancel Factor:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Withdraw w/o Penalty factor:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Withdraw with Penalty factor:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override
Withdraw with Greater Penalty:	0.000	Deadline:	<input type="text"/>	<input type="checkbox"/>	Override

Dynamic Class Data page (1 of )

Class End Date				
Rule:	<input type="text"/>			
Rounding Scheme:	<input type="text"/>			
Factor:	<input type="text" value="0.000"/>	Deadline:	<input type="text"/>	<input type="checkbox"/> Override

Fully Graded Date				
Rule:	<input type="text"/>			
Rounding Scheme:	<input type="text"/>			
Factor:	<input type="text" value="0.000"/>	Deadline:	<input type="text"/>	<input type="checkbox"/> Override

Lapse Start Date				
Rule:	<input type="text"/>			
Rounding Scheme:	<input type="text"/>			
Factor:	<input type="text" value="0.000"/>	Deadline:	<input type="text"/>	<input type="checkbox"/> Override

Sixty Percent Point in Time				
Rule:	<input type="text"/>			
Rounding Scheme:	<input type="text"/>			
Factor:	<input type="text" value="0.000"/>	Deadline:	<input type="text"/>	<input type="checkbox"/> Override

Census Date				
Rule:	<input type="text"/>			
Rounding Scheme:	<input type="text"/>			
Factor:	<input type="text" value="0.000"/>	Deadline:	<input type="text"/>	<input type="checkbox"/> Override

Dynamic Class Data page (2 of 2)

When you run the Dynamic Class Dates process, the Dynamic Class Data page displays the rule scheme, rounding scheme, and factor of each academic calendar date found in the rule. Additionally, for non-OEE dynamic date sections, the process calculates and displays deadline dates. After you run the Dynamic Class Dates process, you can use this page to override the calculated deadlines. You can also use this page to attach a different rule to a class section and rerun the Dynamic Class Dates process.

---

**Note.** Assign a factor of 9999 to exclude a date from the calculation process.

---

**Event ID**                      Displays the event ID that the system associates with the section when you schedule the class.

**Dynamic Class Date Rule** Enter the dynamic class date rule that you want to apply to each primary component class section when you run the Dynamic Class Dates process. Click the Calculate Dynamic Dates button to run the Dynamic Class Dates process. If you leave this field blank and click the Calculate Dynamic Dates button to run the process, the process assigns the rule that you specified on the Offerings page to each corresponding primary component class section. If you have already run the process using the Dynamic Class Dates process page, this field displays the rule that the process used to dynamically calculate the academic calendar dates. You can apply a different rule, as necessary, to a class section and rerun the process.

**Calculate Dynamic Dates** Click to run the Dynamic Class Dates process. The process dynamically calculates the academic calendar deadlines based on the rule that you have attached to the primary component class sections, either in the Dynamic Class Date Rule field or in the corresponding field on the Offerings page. The process displays the calculated deadlines for each landmark date. If you make changes to the rule that applies to a class section after you have run the Dynamic Class Dates process, you must rerun the process to update these deadlines.

For OEE class sections, the process assigns and displays the associated rules, rounding schemes, and factors based on the rule that you have attached to a primary component class section, either in the Dynamic Class Date Rule field or in the corresponding field on the Offerings page. The system calculates deadlines for OEE class during enrollment processing.

---

**Note.** You can click this button as many times as necessary to have the Dynamic Class Dates feature calculate and recalculate the landmark date deadlines.

---

**Deadline and Override** The Dynamic Class Dates process displays the dynamically calculated deadline for the corresponding landmark date according to the dynamic class date rule that you apply to the class section. If you select the corresponding Override check box, this field becomes available so that you can manually enter a new deadline. The system calculates deadlines for OEE class during enrollment processing.

### See Also

[Chapter 9, "Defining Dynamic Academic Calendars," Creating Dynamic Class Date Rules, page 179](#)

## Viewing Class Meeting Patterns

Access the Class Meeting Pattern page (Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Class Meeting Pattern).

<b>Dynamic Class Data</b>		<b>Class Meeting Pattern</b>		<b>Messages</b>							
<b>Course ID:</b>	002101	<b>Course Offering Nbr:</b>	1								
<b>Academic Institution:</b>	PeopleSoft University										
<b>Term:</b>	2005 Spring	<b>Undergrad:</b>	Undergrad								
<b>Subject Area:</b>	PHYSICS	<b>Physics:</b>	Physics								
<b>Catalog Nbr:</b>	130	<b>General Physics:</b>	General Physics								
<b>Session:</b>	Open Entry/Open Exit										
<b>Class Meeting Pattern</b> <span style="float: right;">Find   View All    First 1 of 4 Last</span>											
<b>Class Section:</b>	4	<b>Lecture:</b>	Lecture								
<b>Associated Class:</b>	4	<b>Class Nbr:</b>	1215								
<b>Start Date:</b>	01/24/2005										
<b>End Date:</b>	05/08/2005										
<b>Holiday Schedule:</b>	Academic Holiday Schedule										
<b>Pat Nbr</b>	<b>Start/End Date</b>	<b>Mtg Start</b>	<b>Mtg End</b>	<b>M</b>	<b>T</b>	<b>W</b>	<b>T</b>	<b>F</b>	<b>S</b>	<b>S</b>	<b>Facility ID</b>
1	01/24/2005 05/08/2005			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Class Meeting Pattern page

The system displays the start and end date of the class section, plus class meeting pattern detail for all sections scheduled within a dynamic date or OEE session. If you have already calculated deadlines for the class section, this data enables you to determine if the calculated deadlines are appropriate or whether to override the deadlines or apply a different rule to the class section.

- Holiday Schedule**                      Displays the holiday schedule for the class section.
- Pat Nbr** (pattern number)              Displays the sequence number that identifies the class meeting pattern of the section. The first row always indicates the class meeting pattern of the primary class component. Subsequent rows indicate additional class meeting patterns for a particular class section.
- Start Date and End Date**              Displays the start and end dates of the class component.
- Mtg Start** (meeting start) and **Mtg End** (meeting end)              Displays the meeting start and end time of the class component.
- M** (Monday), **T** (Tuesday), **W** (Wednesday), **T** (Thursday), **F** (Friday), **S** (Saturday), and **S** (Sunday)              Indicates the days of the week that the class component meets.
- Facility ID**                                  Indicates where the class component meets.

## Viewing Dynamic Class Date Process Messages

Access the Messages page (Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Messages).

If the Dynamic Class Dates process encounters any difficulties when it calculates the deadlines for the class section, it writes a message to the message log and displays that message on this page. Use these messages to troubleshoot the problem.

<b>Status</b>	Displays the status of the process run.
<b>Message Text</b>	Displays any messages written to the message log that relate to the process run.
<b>Severity</b>	Displays the severity of messages written to the message log that relate to the process run.
<b>Set</b>	Displays the message catalog set to which the message belongs.
<b>Message Number</b>	Displays a number that identifies the message within the message catalog set to which it belongs.

---

## Managing Dynamic Academic Calendars for OEE Enrollments

If you have set up the academic structure such that a student can enroll in an OEE class, the enrollment engine runs the Dynamic Class Dates process at enrollment time for each student who enrolls in an OEE class section. The Dynamic Class Dates process uses the OEE dynamic date rule that you have associated with the class to calculate the deadlines. The process then stores these dynamically calculated deadlines for the student's OEE enrollment in the STDNT\_ENROLL\_OEE table. To view and override these deadlines, use the Student OEE Enroll Data page.

This section discusses how to view and override dynamic academic calendar dates for OEE enrollments.

### Page Used to Manage Dynamic Academic Calendars for OEE Enrollments

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student OEE Enroll Data (student open entry/exit enrollment data)	OEE_ENRL_DATES	Records and Enrollment, Enroll Students, Student OEE Enrollment Data, Student OEE Enroll Data	View and override the academic calendar date deadlines that the Dynamic Class Dates process calculates for a student's OEE enrollment.

### Viewing and Overriding Dynamic Academic Calendar Dates for OEE Enrollments

Access the Student OEE Enroll Data page (Records and Enrollment, Enroll Students, Student OEE Enrollment Data, Student OEE Enroll Data).

Student OEE Enroll Data			
Healey,Dennis		SR13499	
<b>Term:</b> 0440 2001 Summer	<b>Career:</b> BUSN Graduate Business	<b>Institution:</b> PSUNV PeopleSoft University	
<b>Class Nbr:</b> 1036	<b>Description:</b> Introduction to Intl Economics		
<b>Subject:</b> ECON	<b>Catalog Nbr:</b> 10	<b>Class Section:</b> 1	
<b>Student Enrollment Status:</b>	Enrolled		
<b>Start Date:</b>	06/01/2001		
<b>Dynamic Class Data Rule:</b>	OEE-05WK-1 OEE 5 Week Schedule		
Last Date to Drop			
<b>Rule:</b>			
<b>Rounding Scheme:</b>			
<b>Factor:</b>	9999.000	<b>Deadline:</b> <input type="text"/>	<input type="checkbox"/> <b>Override</b>
Drop Action Dates			
<b>Rule:</b>	B	Point Between Class Start-End	
<b>Rounding Scheme:</b>	EW	End of Week	
<b>Drop Deadline (delete) factor:</b>	0.100	<b>Deadline:</b> <input type="text" value="06/08/2001"/>	<input type="checkbox"/> <b>Override</b>
<b>Drop Deadline (retain) factor:</b>	0.200	<b>Deadline:</b> <input type="text" value="06/08/2001"/>	<input type="checkbox"/> <b>Override</b>
<b>Drop Deadline (Penalty) factor:</b>	0.300	<b>Deadline:</b> <input type="text" value="06/15/2001"/>	<input type="checkbox"/> <b>Override</b>
<b>Drop Deadline(Penalty2) factor:</b>	9999.000	<b>Deadline:</b> <input type="text"/>	<input type="checkbox"/> <b>Override</b>
Cancel & Withdrawal Dates			
<b>Rule:</b>	B	Point Between Class Start-End	
<b>Rounding Scheme:</b>	EW	End of Week	
<b>Cancel Factor:</b>	0.000	<b>Deadline:</b> <input type="text" value="06/01/2001"/>	<input type="checkbox"/> <b>Override</b>
<b>Withdraw w/o Penalty factor:</b>	0.100	<b>Deadline:</b> <input type="text" value="06/08/2001"/>	<input type="checkbox"/> <b>Override</b>
<b>Withdraw with Penalty factor:</b>	0.200	<b>Deadline:</b> <input type="text" value="06/08/2001"/>	<input type="checkbox"/> <b>Override</b>
<b>Withdraw with Greater Penalty:</b>	9999.000	<b>Deadline:</b> <input type="text"/>	<input type="checkbox"/> <b>Override</b>

Student OEE Enroll Data page (1 of 2)



Class End Date			
<b>Rule:</b>	WK		
<b>Rounding Scheme:</b>	EW End of Week		
<b>Factor:</b>	5.000	<b>Deadline:</b>	07/06/2001 <input type="checkbox"/> Override
Fully Graded Date			
<b>Rule:</b>	E Days before/after Class End		
<b>Rounding Scheme:</b>	EW End of Week		
<b>Factor:</b>	14.000	<b>Deadline:</b>	07/20/2001 <input type="checkbox"/> Override
Lapse Start Date			
<b>Rule:</b>	E Days before/after Class End		
<b>Rounding Scheme:</b>	EW End of Week		
<b>Factor:</b>	90.000	<b>Deadline:</b>	10/05/2001 <input type="checkbox"/> Override
Sixty Percent Point in Time			
<b>Rule:</b>	B Point Between Class Start-End		
<b>Rounding Scheme:</b>	EW End of Week		
<b>Factor:</b>	0.600	<b>Deadline:</b>	06/22/2001 <input type="checkbox"/> Override
Census Date			
<b>Rule:</b>	B Point Between Class Start-End		
<b>Rounding Scheme:</b>	EW End of Week		
<b>Factor:</b>	0.100	<b>Deadline:</b>	06/08/2001 <input type="checkbox"/> Override

## Student OEE Enroll Data page (2 of 2)

The Dynamic Class Dates process calculates these deadlines based on the start date of the student's enrollment, which is specified at enrollment time. The Student OEE Enroll Data page displays the rule scheme, rounding scheme, and factor of each academic calendar date in the rule, as well as the calculated deadline.

**Start Date** Displays the date that the student started enrollment in the OEE class. This date drives the Dynamic Class Dates process calculations for OEE enrollments.

**Dynamic Class Data Rule** Displays the rule that the Dynamic Class Dates process applied to this class when the student enrolled in the class. If you run the Dynamic Class Date process, which assigns a rule to the primary component of the OEE class, or if you assign a rule to the class on the Dynamic Class Dates page, then the enrollment engine uses that rule to calculate the deadlines for the landmark dates of the dynamic academic calendar. Otherwise, the enrollment engine uses the OEE dynamic date rule, which is specified on the Offerings page.

**Deadline and Override**

The Dynamic Class Dates process displays the deadline for the corresponding landmark date, calculated according to the dynamic class date rule that you have applied to the class. If you select the corresponding Override check box, this field becomes available so that you can manually enter a new deadline.

**See Also**

[Chapter 9, "Defining Dynamic Academic Calendars," Creating Dynamic Class Date Rules, page 179](#)

## Chapter 10

# Defining Programs, Plans, and Subplans

This chapter discusses how to:

- Define academic programs.
- Define academic plans.
- Define academic subplans.

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## Defining Academic Programs

To set up academic programs, use the Academic Program Table component (ACADEMIC\_PROG\_TBL).

This section provides an overview of academic programs and discusses how to:

- Describe academic programs.
- Set up defaults for academic programs.
- Set up academic standing parameters for academic programs.
- Set up honor and award parameters for academic programs.
- Establish academic organization ownership for academic programs.
- Set taxonomy and repeat checking options for academic programs.
- Define campuses and business units for academic programs.
- Define grade lapse rules for academic programs.
- Set up term enrollment limits for academic programs.
- Set up session enrollment limits for academic programs.
- Set up course count limits for academic programs.
- Set up dynamic date fields for academic programs.
- (AUS) Set up Australian academic programs.
- (NZL) Set up New Zealand academic programs.
- (NLD) Set up Netherlands home campus information.

## Understanding Academic Programs

An *academic program* is the program to which a student applies and is admitted and from which the student graduates. For instance, at a 4-year liberal arts college, the academic program is a liberal arts undergraduate program. At a larger university with a college of fine arts, a school of engineering, and a college of arts and sciences, the academic programs correspond to those broad categories. At a graduate school, there can be a distinct academic program for every area of study, such as a doctoral program in mathematics and a doctoral program in molecular biology.

The academic program controls many factors at the student level. For example, the academic program controls the student's academic level, academic load, academic calendar, academic group for tuition calculation purposes, grading scheme, and admissions evaluation scheme. After you establish academic programs, you can create academic plans (which are subdivisions of academic programs) and academic subplans (which are subdivisions of academic plans).

## Pages Used to Define Academic Programs

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Academic Program	ACADEMIC_PROG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Academic Program	Describe every academic program at an academic institution and link each academic program to an academic career, grading scheme, academic group, academic level rule, and academic calendar.
Standing/Honors	ACAD_PROG_STDG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Standing/Honors	Set up academic standing rules and parameters for academic programs. Set up honor and award rules and parameters for academic programs.
Taxonomy/Campus	ACAD_PROG_OWNR_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Taxonomy/Campus	Establish academic organization owners of the academic program for reporting, analysis, and work distribution purposes. Also, link academic programs to Classification on International Programs (CIP) codes and Higher Education General Information Survey (HEGIS) codes. Define the home campus and business unit for academic programs and the valid campuses for financial aid, registration, and advisement.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Repeat/Incomplete	INCOMPLETE_GRADE	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Repeat/Incomplete	Define grade lapse rules for academic programs. Each rule defines the grade to which incomplete grades lapse when you run reports. The rules also determine the related transcript notes that appear on a student's transcript. Set repeat checking controls at the academic program level and link repeat rules to academic programs.
Enrollment	ENRL_LIMITS_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Enrollment	Set up class enrollment limits for students' academic programs, according to term categories.
Course	CRSE_COUNT_LIMITS	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Course	Set up students' enrollment limits for courses in a specified term category and session type within academic programs. Set up class enrollment limits for students' academic programs, according to sessions.
Dynamic Date	ACAD_PROG_DYN_DATE	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Dynamic Date	Set up dynamic date fields for a specific academic program.
Acad Prog AUS (academic programs Australia)	SSR_ACAD_PROG_AUS	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog AUS	Link Australian government reporting codes to academic programs.
Acad Prog NZL (academic program New Zealand)	SSR_ACAD_PROG_NZL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog NZL	Link New Zealand government reporting codes to academic programs.
Home Campus NLD (home campus netherlands)	SSR_PROG_OWN_NLD	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Home Campus NLD	Set up home campus information for Dutch students.

## Describing Academic Programs

Access the Academic Program page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Academic Program).

Academic Program		Standing/Honors	Taxonomy/Campus	Repeat/Incomplete	Enrollment
<b>Academic Institution:</b>	PSUNV PeopleSoft University				
<b>Academic Program:</b>	FAU				
Find   View All First 1 of 1 Last					
<b>*Effective Date:</b>	01/01/1900	<b>*Status:</b>	Active		
<b>*Description:</b>	Fine Arts Undergraduate				
<b>*Short Description:</b>	Fine Arts	<b>First Term Valid:</b>	0210	1995 Fall	
<b>*Academic Career:</b>	UGRD	Undergraduate			
<b>Grading Scheme:</b>	UGD	Undergraduate Grading Scheme			
<b>GB Default for Transfer Credit:</b>	GRD	Graded			
<b>Default Grade- Transfer Credit:</b>	T	Transfer			
<b>*Academic Group:</b>	FA	College of Fine Arts			
<b>*Academic Level Rule:</b>	UGRD	Undergraduate			
<b>*Academic Calendar:</b>	USEM	Undergraduate Semester Cal			
<b>Dual Academic Program:</b>					
<b>Default Academic Plan:</b>	UNDECL-UG	Undeclared Undergraduate			
<b>Default Campus:</b>	MAIN	Main Hacienda Campus			
<b>*Transcript Level:</b>	Official				
<b>Career Pointer Exception Rule:</b>		<input checked="" type="checkbox"/> <b>Only if Outside Career</b>			
<b>Residency Required:</b>	<input type="checkbox"/>				
<b>Financial Aid Eligible:</b>	<input checked="" type="checkbox"/>				
<b>Primacy Nbr:</b>	10				
<b>Last Prospect Date</b>					
<b>Last Admit Term</b>	0680	2012 Spr			

**Edit Advisors Against**

- Personal Data**
- Instructor Advisor**
- Advisor Role**

Academic Program page

**First Term Valid**

Enter the first term in which students can be admitted to the academic program. You cannot admit students to the academic program before the term that you specify. If you enter term 0000, you can admit students to the program for any term. When you convert data to the PeopleSoft system, be sure that you enter a first valid term that is appropriate for the preexisting data of the academic program. This field is optional.

**Academic Career**

Enter the academic career to which the academic program belongs.

<b>Grading Scheme</b>	By default, displays the grading scheme of the academic career. Enter a new value to override the default value. The grading scheme defines all valid grading bases of the academic program. The system applies the grading scheme to classes within the academic program. In addition, the system displays the grading scheme of the academic program in the equivalent fields throughout transfer credit processing whenever credit is transferred into that academic program. When the system converts transfer credit, it uses the grading basis of the lowest definable level.
<b>GB Default for Transfer Credit</b> (grading basis default for transfer credit)	By default, displays the transfer credit default grading basis of the academic career (as defined on the Academic Career Table page). Enter a new value to override the default value. This grading basis appears on various pages for transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grading basis of the lowest definable level.
<b>Default Grade – Transfer Credit</b>	By default, displays the transfer credit default grade of the academic career. Enter a new value to override the default value. This grade appears on various pages throughout transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grade of the lowest definable level.
<b>Academic Group</b>	Enter the academic group to which the academic program belongs. PeopleSoft Student Financials uses academic groups for tuition calculation. The academic group value does not indicate sole ownership of the academic program by the academic group. Define ownership for reporting and financial analysis purposes on the Taxonomy/Campus page of this component.
<b>Academic Level Rule</b>	Enter the academic level rule for the academic program. This rule defines how the system calculates the academic level for students who are in the academic program.
<b>Academic Calendar</b>	Enter the academic calendar for the academic program. The system uses the academic calendar that you enter to determine many of the important dates associated with the academic program.
<b>Dual Academic Program</b>	Enter the second academic program, if the academic program is a joint program (such as J.D./M.B.A.). This enables PeopleSoft Recruiting and Admissions to evaluate and accept students into both academic programs with one application.
<b>Default Academic Plan</b>	Enter a default academic plan for the academic program. The system uses the value that you enter as the default academic plan for new applicants to the academic program. The selection appears on the Quick Admit, Recruit Prospective Students, and Application Entry pages.
<b>Default Campus</b>	Enter the default campus for the academic program. The value that you enter appears on the Quick Admit, Create Prospects, and Application components for new applicants to this academic program. Define campuses on the Campus Table page.

<b>Transcript Level</b>	Select a transcript level to determine the types of transcripts on which the system includes the specified data. Values are: <i>Not Print</i> , <i>Official</i> , <i>Unofficial</i> , <i>Stdnt Life</i> (student life), and <i>Degr Prog</i> (degree progress).
<b>Career Pointer Exception Rule</b>	Enter the career pointer exception rule for the academic program. If the academic program does not have any career exceptions—that is, if enrollments in other careers' courses follow the rules on the Academic Career Pointers page—leave this field empty.
<b>Only if Outside Career</b>	Select to use the career pointer exception rules only against class enrollments that are outside the academic career associated with the academic program. Clear this check box to use the career pointer exception rules against all class enrollments in the academic program.
<b>Residency Required</b>	<p>Select to require residency data for students in the academic program. When you attempt to activate a student into a term, the Term Activation process determines whether a student's academic program requires that the student have residency data in the system. If so and the student does not have residency data in the system, the Term Activation process does not activate the student for the term. This blocks the student from class enrollment and tuition calculation.</p> <p>The value of this check box appears by default, according to the setting of the Residency Required field on the Institution 1 page for the academic institution to which the academic program belongs.</p>
<b>Financial Aid Eligible</b>	Select to indicate that students in the academic program are eligible for financial aid. This check box works in conjunction with the Enforce FA Eligibility (enforce financial aid eligibility) check box on the Statistics Period Type page. The Consolidate Academic Statistics process uses these check boxes to determine which students to include in calculations. For example, if the academic program belongs to a continuing education or nondegree academic career and you want to exclude students within the academic program from the process calculations, clear the Financial Aid Eligible check box on this page and select the Enforce FA Eligibility check box on the Statistics Period Type page.
<b>Primacy Nbr</b> (primacy number)	Enter the primacy number for the academic program. The system uses this number as a key to determine a student's primary academic program when you consolidate academic statistics. The system also uses this number to prioritize financial aid applications when students are enrolled in multiple academic programs at the same time. The lowest number takes precedence.
	<hr/> <b>Note.</b> It is recommended that you coordinate the numbering with Financial Aid to avoid conflicts. <hr/>
<b>Last Prospect Date</b>	Enter the latest date that a program can be populated for a new prospect record. You cannot assign a program to a prospect if the system date is greater than the last prospect date.



**Last Admit Term**

Enter the last term in which students can be admitted to the academic program. You cannot admit students to the academic program after the term that you specify. The system will compare the admit term used in the student's application to this last term valid value. If the admit term is greater than this value, the program is not available to the user. This field is optional.

**Edit Advisors Against**

Select the view that the system uses when prompting you to assign an advisor for a student in the academic program. Assign advisors to students on the Student Advisor page. If you are defining a new academic program, the system displays the value from the corresponding field on the Academic Career Table page. The option that you select appears by default on the Student Milestone page and the Student Advisor page. Options are:

- *Personal Data*: Prompts against all people with a personal data record in the PeopleSoft system.
- *Instructor Advisor*: Prompts against all people defined as instructors and advisors on the Instructor/Advisor Table page, as defined for the academic program.
- *Advisor Role*: Prompts against all people defined as advisors on the Instructor/Advisor Table page, as defined for the academic program.

**See Also**

Chapter 9, "Defining Dynamic Academic Calendars," page 175

## Setting Up Academic Standing Parameters for Academic Programs

Access the Standing/Honors page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Standing/Honors).

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Preparing to Track Student Data," Linking Academic Standing, Honors, and Awards Rules to Academic Programs

*PeopleSoft Student Records 9.0 PeopleBook*, "Preparing to Track Student Data," Linking Honor Award Rules to Academic Programs

## Setting Taxonomy, Academic Organization Ownership, and Campus Information for Academic Programs

Access the Taxonomy/Campus page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Taxonomy/Campus).

<b>Academic Program</b>		<b>Standing/Honors</b>		<b>Taxonomy/Campus</b>		<b>Repeat/Incomplete</b>		<b>Enrollment</b>	
<b>Academic Institution:</b>	PSUNV		PeopleSoft University						
<b>Academic Program:</b>	FAU		Fine Arts Undergraduate						
Find   View All    First ◀ 1 of 1 ▶ Last									
<b>Effective Date:</b>	01/01/1900		<b>Status:</b>	Active					
<b>Taxonomy</b>									
<b>CIP Code:</b>	<input type="text"/>								
<b>HEGIS Code:</b>	<input type="text"/>								
<b>IPEDS Normal Completion (years):</b>	<input type="text"/>								
<b>Ownership</b>									
<b>Academic Organization:</b>	<input type="text" value="FA"/>		College of Fine Arts		<b>Split Ownership</b> <input type="checkbox"/>				
<b>Campus</b>									
Find   View All    First ◀ 1 of 1 ▶ Last									
<b>*Campus:</b>	<input type="text" value="MAIN"/>		Main Hacienda Campus		+ -				
<b>*Business Unit:</b>	<input type="text" value="PSUNV"/>		PeopleSoft University Bursar						
<b>*FA Campus:</b>	<input type="text" value="MAIN"/>		Main Hacienda Campus						
<b>*Registrar Campus:</b>	<input type="text" value="MAIN"/>		Main Hacienda Campus						
<b>*Advisement Campus:</b>	<input type="text" value="MAIN"/>		Main Hacienda Campus						

Taxonomy/Campus page

**Taxonomy**

**CIP Code**(Classification of Instructional Programs code)    Enter the CIP code for this academic program.

**HEGIS Code** (Higher Education General Information Survey code)    Enter the HEGIS code for this academic program.

**IPEDS Normal Completion (years)**(Integrated Postsecondary Education Data System normal completion years)    Enter the number of years it normally takes a student to complete this academic program.

## **Ownership**

<b>Academic Organization</b>	Enter the academic organization that offers courses in the academic program. Any academic organization entered here should also have a detail node associated with it for this academic program on the academic organization tree. Define academic organizations on the academic organization tree.
<b>Split Ownership</b>	Select to designate multiple academic organization owners for this academic program. If you select this check box, the lower Academic Organization field and the Percent Owned field become available.

## **Campus**

<b>Campus</b>	Enter a primary campus for the academic program.
<b>Business Unit</b>	Enter the business unit (for bursar purposes) for the academic program. Define business unit values on the SF Business Unit Table page.
<b>FA Campus</b> (financial aid campus)	Enter the campus responsible for administering the academic program's financial aid. The system displays values from the Campus Table page.
<b>Registrar Campus</b>	Enter the campus responsible for student records within the academic program. The system displays values from the Campus Table page.
<b>Advisement Campus</b>	Enter the campus responsible for student advising within the academic program. The system displays values from the Campus Table page.

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**Note.** You can add multiple campuses to any field on this page by inserting a new row.

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## **See Also**

[Chapter 13, "Securing Your Academic Institution," Securing Academic Organizations, page 269](#)

*PeopleTools PeopleBook: PeopleSoft Tree Manager*

## **Defining Repeating Rules and Grade Lapse Rules for Academic Programs**

Access the Repeat/Incomplete page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Repeat/Incomplete).

Academic Program		Standing/Honors		Taxonomy/Campus		<b>Repeat/Incomplete</b>		Enrollment	
<b>Academic Institution:</b>	PSUNV PeopleSoft University								
<b>Academic Program:</b>	FAU Fine Arts Undergraduate								
Find   View All First 1 of 1 Last									
<b>Effective Date:</b>	01/01/1900				<b>Status:</b>	Active			
<b>Repeat Rule</b>									
<b>Repeat Rule:</b>	<input type="text"/>								
<b>Process on Enrollment:</b>	No		<input type="checkbox"/> Temporarily Suspend Repeat Check on Enrollment						
<b>Repeat Grade Check:</b>	Never		<input type="checkbox"/> Temporarily Suspend Repeat Check on Grade Input						
<b>Course Catalog Repeats</b>									
<b>*Course Catalog Repeat Message:</b>	None								
<b>Incomplete Grade</b>									
<b>Incomplete Grade:</b>	<input type="text"/>								
	<input type="checkbox"/> <b>Lapse Grade</b>								
<b>Lapse To Grade:</b>	<input type="text"/>								
<b>Lapse Days:</b>	<input type="text"/>								
<b>Lapse Transcript Note ID:</b>	<input type="text"/>								
	<input checked="" type="checkbox"/> <b>Print Lapse Date</b>								
<b>Completed Transcript Note ID:</b>	<input type="text"/>								
	<input type="checkbox"/> <b>Print Completed Date</b>								

Repeat/Incomplete page

**Repeat Rule**

**Repeat Rule**

Enter a repeat rule for this academic program. The system prompts you with valid choices according to the academic career to which this academic program belongs. Repeat rules contain the conditions that define repeat checking policies. For example, the repeat rule can specify how many times a student can take courses given certain conditions, such as the grades that the student earns. Settings at the academic career level are defaults for all of the academic programs within this academic career wherein a repeat rule is not attached to the academic program. Repeat rules must be assigned to an academic career for the Repeat Checking process to function at grade input.

**Process on Enrollment**

Use this field to activate the Repeat Checking process at enrollment time for this academic program. The choices are *Yes* and *No*.

Select *Yes* if you want the Repeat Checking process to run during enrollment for this academic program. This is a front-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is front-end because it checks for repeats at enrollment time, rather than when you post grades. You can run the Repeat Checking process for the entire academic institution, for students in particular academic careers within the academic institution, and for students in primary academic programs within academic careers. This field is unavailable if *No* is selected at the academic career or academic institution levels.

Enter *No* if you do not want the Repeat Checking process to run during enrollment processing for students in this academic program. This field is unavailable when you select *No* at the academic career or academic institution level.

**Repeat Grade Check**

Use this field to activate or deactivate the Repeat Checking process upon grade submission on the Enrollment Request page or the Quick Enrollment page for this academic program. Select one of the following values:

*All Crse*: Select to run the Repeat Checking process upon grade submission on the Enrollment Request page for this academic program. This back-end process checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is back-end because it checks for repeats when you post grades, after the student has already completed the class, rather than at enrollment time. You can run the Repeat Checking process for the entire academic institution, for academic careers within the academic institution, and for academic programs within academic careers. This field is unavailable if *Never* is selected at the academic institution levels.

*Never*: Select if you do not want the Repeat Checking process to run upon grade submission on the Enrollment Request page. This field is unavailable when you select *Never* at the academic career or academic institution level.

*Only Rep* (only repeats): Select if you want to run the process against all class enrollments in a student's enrollment record (STDNT\_ENRL table) where the repeat candidate field is set to Y. The only time that the system does not set the repeat candidate field to Y is for class enrollments entered through the Enrollment component or for classes for which the course is defined as an allowable repeat through the Course Catalog component.

**Temporarily Suspend Repeat Check on Enrollment**

(temporarily suspend repeat checking on enrollment)

Select to temporarily suspend the Repeat Checking process at enrollment time for students in this academic program. This check box enables you to temporarily suspend repeat checking during peak enrollment periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to re-enable the Repeat Checking process on enrollment. Use this functionality sparingly, because students attempting to repeat a class are not warned about a possible illegal repeat.

**Temporarily Suspend Repeat Check on Grade Input** (temporarily suspend repeat checking on grade input) Select to temporarily suspend the Repeat Checking process during grade input for this academic program. This check box enables you to temporarily suspend repeat checking during peak grading periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to re-enable the Repeat Checking process on grade input. Use this functionality sparingly, because the system does not check for repeats, so you will not know if any repeat rules apply to students until you run the Repeat Checking process in batch.

### **Course Catalog Repeats**

**Course Catalog Repeat Message** Select one of the following message types that the system displays during enrollment when the Allowable Repeats process detects that the student has previously taken the course.

*Error:* Issues an error and prevents the student from enrolling in the repeated class.

*Warning:* Issues a warning that the repeatable limit as established on the course catalog has been exceeded. The student is still able to enroll in the class.

*None:* Issues no warning or error, and the student is still able to enroll in the class.

The Allowable Repeats process runs at class enrollment time and looks at settings at the course catalog level to see whether a course can be repeated. This process does not affect student statistics; it is used only to determine whether a student can repeat a course. When the completions maximum or units maximum has been exceeded, the system issues enrollment messages, depending on the message type entered and assuming that the Course Catalog Repeats functionality is in effect.

The system renders the Course Catalog Repeat Message field unavailable when you enter *Yes* in the Process on Enrollment field. The system renders the field unavailable because when you run the Repeat Checking on Enrollment process, the Allowable Repeats process does not issue a message when a repeated course is in violation of the course catalog repeat maximums. The Repeat Checking process analyzes the student's enrollment records for repeated courses and issues warnings only after the Allowable Repeats process identifies an enrollment that exceeds the completions maximum or units maximum set on the Catalog Data page of the Course Catalog component.

### **Incomplete Grade**

This page allows you to define grade lapse rules for academic programs. Enter all of the grade lapse rules necessary to instruct the system how students' incomplete grades should lapse when you run the Grade Lapse report process and what transcript notes, if any, the system displays on a student's transcript.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Grading Students," Running the Grade Lapse Process

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Repeat Checking," Setting Up Repeat Checking for Academic Programs

## Setting Up Term Enrollment Limits for Academic Programs

Access the Enrollment page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Enrollment).

Academic Program		Standing/Honors		Taxonomy/Campus		Repeat/Incomplete		Enrollment	
<b>Academic Institution:</b>	PSUNV PeopleSoft University								
<b>Academic Program:</b>	FAU Fine Arts Undergraduate								
Find   View All First 1 of 1 Last									
<b>Effective Date:</b>	01/01/1900			<b>Status:</b>	Active				
<b>Allow OEE Enrollment</b>	<input checked="" type="checkbox"/>								
Find   View All First 1 of 3 Last									
<b>*Term Category:</b>	Intersessn		<input type="checkbox"/> Check Min Before Open Enroll						
<b>Full Time Max Total Units:</b>	3.00		<b>Part Time Max Total Units:</b>	3.00					
<b>Full Time Min Total Units:</b>			<b>Part Time Min Total Units:</b>						
<b>Full Time Max No GPA Units:</b>	3.00		<b>Part Time Max No GPA Units:</b>	3.00					
<b>Full Time Max Audit Units:</b>	3.00		<b>Part Time Max Audit Units:</b>	3.00					
<b>Full Time Max Wait List Units:</b>	3.00		<b>Part Time Max Wait List Units:</b>	3.00					
<b>Full Time Projected Bill Units:</b>	3		<b>Part Time Projected Bill Units:</b>	3					
<b>Bill for Wait List Units:</b>	<input checked="" type="checkbox"/>			<b>Include Wait List in Total:</b>	<input checked="" type="checkbox"/>				
Find   View All First 1 of 1 Last									
<b>*Session:</b>	Mini								
<b>Only Use Term Unit Limits:</b>	<input checked="" type="checkbox"/>								
<b>Full Time Max Total Units:</b>			<b>Part Time Max Total Units:</b>						
<b>Full Time Max No GPA Units:</b>			<b>Part Time Max No GPA Units:</b>						
<b>Full Time Max Audit Units:</b>			<b>Part Time Max Audit Units:</b>						
<b>Full Time Max Wait List Units:</b>			<b>Part Time Max Wait List Units:</b>						

Enrollment page

When checking enrollment unit limits, the enrollment engine first checks the term limits of the academic program (as defined here). If the student meets the enrollment unit limits for the term, then the enrollment engine checks the enrollment limits for the session (as defined on the Session page of the Academic Program Table component), if units limits were defined for the session. If the student meets the enrollment limit requirements for the session (or if no limits were defined for the session), the enrollment engine checks the enrollment unit limits for the appointment, if the open enrollment date has not been reached. Appointment enrollment unit limits only apply before the open enrollment period.

The full-time limits and part-time enrollment limits that you set on this page apply to students approved for a full-time or part-time academic load in the specified academic program and term category.

<b>Term Category</b>	Select the term category for the default term enrollment limits of the academic program. You can modify these translate values.
	<hr/> <b>Note.</b> You link term category values to actual terms and academic careers on the Term Table page. <hr/>
<b>Check Min Before Open Enrollment</b> (check minimum before open enrollment)	Select to enable the enrollment engine to verify enrollment requests against the minimum unit amounts set <i>before</i> the open enrollment date. Set the open enrollment date on the Session Table page.
<b>Full Time Max Total Units</b> (full-time maximum total units) and <b>Part Time Max Total Units</b> (part-time maximum total units)	Enter the maximum number of units that full-time and part-time students can have for the specified term category within the academic program.  If you select the Include Wait List in Total check box on this page, the enrollment engine calculates the student's total units by adding the units taken (UNT_TAKEN) for rows in the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals <i>E</i> (enrollment) or <i>W</i> (waiting). If you clear the check box, the enrollment engine includes only the units taken for rows where the student enrollment status equals <i>E</i> .
<b>Full Time Min Total Units</b> (full-time minimum total units) and <b>Part Time Min Total Units</b> (part-time minimum total units)	Enter the minimum number of units that full-time and part-time students can have for the specified term category within the academic program. The enrollment engine references this value only when a student attempts to drop a class or make a unit adjustment for a class. To calculate the student's total units, the enrollment engine adds the units taken (UNT_TAKEN) for rows in the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals <i>E</i> (enrollment).
<b>Full Time Max No GPA Units</b> (full-time maximum non-grade point average units) and <b>Part Time Max No GPA Units</b> (part-time maximum non-grade point average units)	Enter the maximum number of units that full-time and part-time students can have with a non-GPA grading basis for the specified term category within the academic program. This number includes the maximum audit units.  To calculate the student's total non-GPA units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals <i>E</i> (enrollment) and the include in GPA (INCLUDE_IN_GPA) flag equals <i>N</i> (no).



**Full Time Max Audit Units** (full-time maximum audit units) and **Part Time Max Audit Units** (part-time maximum audit units)

Enter the maximum number of non-GPA units that full-time and part-time students can have with an audit grading basis for the specified term category within this academic program. This number is part of the maximum non-GPA units.

To calculate the student's total audit units, the enrollment engine adds the units taken (UNT\_TAKEN) for rows on the STDNT\_ENRL table where the student enrollment status (STDNT\_ENRL\_STATUS) equals *E* (enrollment) and the audit grade basis (AUDIT\_GRADE\_BASIS) flag equals *Y* (yes).

**Full Time Max Wait List Units** (full-time maximum wait list units) and **Part Time Max Wait List Units** (part-time maximum wait list units)

Enter the maximum number of wait list units that full-time and part-time students can have in the specified term category within the academic program.

Wait list units are any combination of graded, non-GPA, and audit units. To calculate the student's total wait list units, the enrollment engine adds the units taken (UNT\_TAKEN) for rows on the STDNT\_ENRL table where the student enrollment status (STDNT\_ENRL\_STATUS) equals *W* (waiting).

**Full Time Projected Bill Units** and **Part Time Projected Bill Units**

Enter the number of units that the system uses to calculate projected tuition for billing before the completion of enrollment for full-time and part-time students in the term category within the academic program.

**Bill for Wait List Units**

Select to include wait list units in tuition calculations.

**Include Wait List in Total**

Select to have the enrollment engine include wait list units when calculating a student's full-time and part-time maximum total units. Clear this check box to enable a student to have up to the maximum wait list units regardless of maximum total units.

---

**Note.** This check box affects only full-time and part-time maximum total units for the term. It *does not* affect session or appointment enrollment limits.

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### **Examples of Term Enrollment Limits**

Suppose that the Liberal Arts Undergraduate (LAU) program at PeopleSoft University (PSUNV) limits full-time student enrollment into regular terms, as shown in this table:

<b>Field</b>	<b>Value</b>
Full Time Max Total Units	18
Full Time Max No GPA Units	6
Full Time Max Audit Units	3
Full Time Max Wait List Units	6

<b>Field</b>	<b>Value</b>
Include Wait List in Total	Y

A full-time student can enroll in a maximum of 18 units for the term. Of these 18 units, six can be non-GPA units. Of the six non-GPA units, three can be audit units. Suppose that a student has the maximum of six wait list units and has yet to enroll in any units. Because the Include Wait List in Total check box is selected, the student can enroll in 12 additional units before reaching the maximum total units. Of these 12 units, six can be non-GPA units. Of the six non-GPA units, three can be audit units.

The Fine Arts Undergraduate (FAU) program at PSUNV limits part-time enrollment into these regular terms:

<b>Field</b>	<b>Value</b>
Part Time Max Total Units	11
Part Time Max No GPA Units	3
Part Time Max Audit Units	3
Part Time Max Wait List Units	6
Include Wait List in Total	N

A part-time student can enroll in a maximum of 11 units for the term. Of these 11 units, three can be non-GPA units. Of the three non-GPA units, three can be audit units. Suppose that a student enrolls in eight units. Because the Include Wait List in Total check box is cleared, the student can enroll in an additional three units maximum. Of these three units, three can be non-GPA units. Of the three non-GPA units, three can be audit units. The student can also add six additional wait list units.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Managing Enrollment and Validation Appointments"

## Setting Up Course Count Limits for Academic Programs

Access the Course page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Course).

Taxonomy/Campus		Repeat/Incomplete		Enrollment		Course		Dynamic Date	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University							
<b>Academic Program:</b>	FAU	Fine Arts Undergraduate							
Find   View All First 1 of 1 Last									
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active						
<b>Course Count Enrollment:</b>	<input type="checkbox"/>								
<b>Min Course Count to Count:</b>	<input type="text"/>								
Find   View All First 1 of 3 Last									
<b>Term Category:</b>	Interession Term								
<b>Full Time Max Courses:</b>	<input type="text"/>								
<b>Part Time Max Courses:</b>	<input type="text"/>								
Find   View All First 1 of 1 Last									
<b>Session:</b>	Mini Session								
<b>Full Time Max Courses:</b>	<input type="text"/>								
<b>Part Time Max Courses:</b>	<input type="text"/>								

### Course page

The enrollment engine uses these enrollment limits in addition to the unit limits when determining whether a student can enroll in a course. Define course count enrollment limits for specific course offerings on the Catalog Data page of the Course Catalog component.

- Course Count Enrollment** Select to activate course count processing for class enrollment in the academic program. If you select the Only Use Term Unit Limits check box on the Session page, the session type fields are unavailable. Otherwise, all fields on this page are available.
- Min Course Count to Count** (minimum course count to count) If applicable, enter the minimum course count value that a course must be worth to count towards the total full-time and part-time maximum course counts. For example, if you indicate that a course must meet a minimum course count value of 0.50, then a course's count value must be greater than or equal to 0.50 to count towards the full-time maximum course and part-time maximum course limits.
- Full Time Max Courses**(full-time maximum courses (upper) Enter the full-time maximum course counts for students enrolling in classes within the specified term category of the academic program.
- Part Time Max Courses** (part-time maximum courses (upper)) Enter the part-time maximum course counts for students enrolling in classes within the specified term category of the academic program. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.

**Full Time Max Courses** (full-time maximum courses (lower)) If you set specific session unit limits for this term category on the Session page, the Full Time Max Courses field and Part Time Max Courses field become available. Enter the full-time maximum course counts for students enrolling in classes within the session type of the specified term category.

**Part Time Max Courses** (part-time maximum courses (lower)) Enter the part-time maximum course counts for students enrolling in classes within the session type of the specified term category. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.

## Setting Up Dynamic Date Fields for Academic Programs

Access the Dynamic Date page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Dynamic Date).

Dynamic Date page

**Note.** For students within a specified academic program to be able to drop or withdraw from open entry/exit classes, you must define the values on this page.

This page is available only if you enable the use of the Dynamic Class Dates features on the Academic Career Table 2 page. When you apply a dynamic class date rule to a class or OEE enrollment, the system uses the student's primary academic program to control the reasons and penalties when a student cancels, withdraws from, or drops a class. These reasons and penalties relate to the corresponding landmark date deadlines on the dynamically calculated academic calendars. They apply to students according to the academic program and according to the dynamic class date rule of a class. You set up the dynamic class date rules on the Dynamic Class Dates page. You view and override the calculated deadlines for the regular dynamic class date rules on the Dynamic Data page and for OEE dynamic date rules on the Student OEE Enroll (student open entry/exit enrollment) page.

When processing drops or withdrawals for dynamically dated classes during the penalty periods, the enrollment engine uses the penalty grades specific to the student's grading basis, as defined on the Grading Scheme Table page. If you have not defined penalty grades for the student's grading basis, the enrollment engine instead uses the grading bases and grades that you define for the student's primary academic program.

### ***Dynamic Date Fields***

<b>Cancel Reason</b>	Enter the enrollment action reason that applies to a student's enrollment record when the student cancels a dynamically dated class on or before the cancel-date deadline. You can modify these translate values.
<b>Withdraw without Penalty Reason</b>	Enter the enrollment action reason that applies to a student's enrollment record when the student withdraws from or drops a dynamically dated class after the cancel deadline but on or before the withdraw-without-penalty deadline. You can modify these translate values.
<b>Withdraw with Penalty Grade Basis</b>	Enter the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. Set up grading basis values on the Grading Scheme Table page. The grading basis that you enter determines the grades available in the Withdraw With Penalty Grade field.
<b>Withdraw with Penalty Grade</b>	Enter the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline.
<b>Withdraw with Greater Penalty Grade Basis</b>	Enter the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline. The grading basis that you select determines the grades available in the Withdraw With Greater Penalty Grade field.
<b>Withdraw with Greater Penalty Grade</b>	Enter the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline.

<b>Drop without Penalty Reason</b>	Enter the enrollment action reason that applies to a student's enrollment record when the student drops from a dynamically dated class after the drop-and-delete deadline but on or before the drop-and-retain-record deadline. You can modify these translate values.
<b>Drop with Penalty Grade Basis</b>	Enter the grading basis that determines a student's grade when the student drops a dynamically dated class after the drop-and-retain-record deadline but on or before the drop-with-penalty deadline. The grading basis that you select determines the grades available in the Drop With Penalty Grade field.
<b>Drop with Penalty Grade</b>	Enter the grade that applies to a student's enrollment record when the student drops a dynamically dated class after the drop-and-retain-record deadline but on or before the drop-with-penalty deadline.
<b>Drop with Greater Penalty Grade Basis</b>	Enter the grading basis that determines a student's grade when the student drops a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline. The grading basis that you select determines the grades available in the Drop With Severe Penalty Grade field.
<b>Drop with Severe Penalty Grade</b>	Enter the grade that applies to a student's enrollment record when the student drops a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline.

### **See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Grading," Defining Grading Schemes

## **(AUS) Setting Up Australian Academic Programs**

Access the Acad Prog AUS page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog AUS).

[Enrollment](#) | [Course](#) | [Dynamic Date](#) | **Acad Prog AUS** | [Acad Prog NZL](#) | [Home Campus NLD](#)

**Academic Institution:** PSUNV PeopleSoft University  
**Academic Program:** LAU Liberal Arts Undergraduate

Find | View All | First 1 of 1 Last

**Effective Date:** 01/01/1900      **Status:** Active  
**\*Field of Study:** 030101 Arts, Humanities, Social Sc.  
**Field of Education Code:** 091523 Literature  
**Program Type Code:** 10 Bachelor's Pass  
**Special Program Type:** 00 Not Course of Special Interest  
**Aggregated EFTSL:** 30 3 Years  
**Minimum Units:** 360.00  
**Program Eligibility:** PELS Eligible Program  
**CRICOS Code:**   
 **Combined Course Indicator**  
**Supplementary FOS:** 000000 Non-Award  
**Supplementary FOE:** 010101 Mathematics

Acad Prog AUS page (1 of 2)

**DEST Related Programs** Customize | Find | First 1 of 1 Last

	Related Academic Program	*Status	
1	LAU Liberal Arts Undergraduate	Active	+ -

**TAC Program Mapping** Find | View All | First 1 of 1 Last

**Program Code:** 1105 Bachelor of Arts  
**TAC Stream Code:**   
**Academic Load:** Full-Time  
**Academic Plan:** MATHBS Mathematics (BS)  
**Mode of Attendance:** Internal Mode of Attendance  
**Campus:**

Acad Prog AUS page (2 of 2)

## **Additional Elements**

<b>Field of Study</b>	Enter the field of study that most closely matches the academic program. Define field of study codes on the Field of Study AUS page.
	<hr/> <b>Note.</b> Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference. <hr/>
<b>Field of Education Code</b>	Enter the field of education that most closely matches the academic program. Define field of education codes on the Field of Education AUS page.
<b>Program Type Code</b>	Enter the program type code for this academic program. Define program type codes on the Program Type Table page.
<b>Special Program Type</b>	Enter a special program type, if applicable. Special programs are programs that are of special interest to Department of Education, Science, and Training (DEST).
<b>Aggregated EFTSL</b> (aggregated Equivalent Full Time Student Load)	Enter the aggregated EFTSL value for this academic program. This is the sum of all the EFTSL values needed to fulfil the requirements of the program. For example, a three-year program has a total EFTSL value of 3 and the aggregated EFTSL value is 30. Define aggregated EFTSL values on the Aggregated EFTSL AUS page.
<b>Minimum Units</b>	Enter the minimum units needed to satisfy the requirements of this academic program. For example, if 120 units a year is a full-time load for a bachelors program, the minimum units would likely be 360. The Student Enrolment DEST report (srdesten.sqr) uses this field in determining percentage of transfer credit for students.
<b>Program Eligibility</b>	Select to indicate whether the student is eligible or ineligible to participate in the Postgraduate Education Loan Scheme (PELS) program.
<b>CRICOS Code</b>	Enter the seven-digit CRICOS code that you want to associate with this academic program. The CRICOS code is used by the Department of Immigration to identify valid programs for international students. This code is not related to DEST.
<b>Combined Course Indicator</b>	Select to indicate that this academic program is a combined course, such as Arts/Law. When you select this check box, the Supplementary FOS and Supplementary FOE fields become available.
<b>Supplementary FOS</b> (supplementary field of study)	If this program is a combined course, enter the secondary field of study. This field is available if you select the Combined Course Indicator check box.
	<hr/> <b>Note.</b> Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference. <hr/>



**Supplementary FOE**  
(supplementary field of education)

If this program is a combined course, enter the secondary field of education. This field is available if you select the Combined Course Indicator check box.

### ***DEST Related Programs Group Box***

**Related Academic Program and Status**

Enter the related programs for this academic program. DEST uses related program information to determine the commencement date (DEST element 328) of a student's program. For example, if a student was enrolled into a masters program and then one year later changes to a graduate program, DEST might consider these related programs. If DEST defines two programs as related, the determination of the commencement date for the student's program should be from the admit term of the masters program, in our example, and not the admit term of the graduate program. You should add all related programs for each academic program.

### ***TAC Program Mapping Group Box***

**Program Code**

Enter the appropriate program code for this academic program. This field is used for the Training Accreditation Council (TAC) Bulk Upload and is not related to DEST. Program codes are set up on the Program Code Table AUS page.

**TAC Stream Code**

Enter the appropriate TAC stream code for this academic program. This field is also used for the TAC Bulk Upload and is not related to DEST.

**Academic Load**

Select the appropriate academic load. Values are: *Full-time, Part-time, Part-time Vocational TR, Vocational Coaching, and Vocational Training.*

**Academic Plan**

Enter an academic plan to associate with the academic program.

**Mode of Attendance**

Select the mode of attendance for this academic program. Values are: *External Mode of Attendance, Internal Mode of Attendance, Multi-modal Mode of Attendance, Completed Course - OLAA (Open Learning Australia), and Submission of Original Work.*

**Campus**

Enter the campus associated with this academic program.

## **(NZL) Setting Up New Zealand Academic Programs**

Access the Acad Prog NZL page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog NZL).

The screenshot shows the 'Acad Prog NZL' page with the following details:

- Repeat/Incomplete: [ ]
- Enrollment: [ ]
- Course: [ ]
- Dynamic Date: [ ]
- Acad Prog NZL: [Active]
- Home Campus NLD: [ ]
- Graduation: [ ]
- Academic Institution: PSNZL Silver Fern University
- Academic Program: BSCI Bachelor of Science
- Effective Date: 01/01/1900
- Status: Active
- \*Prospectus Code: 772222
- Qualification Award Category: [ ]
- \*Program Type Code: Normal (Normal)
- \*StudyLink Funding: Loans and Allowances
- Course Classification: 13 (Health Sciences)
- Funding Category: B2 (Science & Enginrg - Degree)
- Education Level: [ ]
- Report to MoE

Acad Prog NZL page

**Prospectus Code**

Enter the prospectus code for the program. This code is the unique identifier for the program from the Ministry of Education Prospectus database.

**Qualification Award Category**

(Optional) Select a category from the list of SDR Qualification Award Categories. This value is for informational purposes. Values for this field are delivered as translate values. You can modify these values.

**Program Type Code**

Select a program type code for the academic program. The New Zealand Ministry of Education requires that you assign all programs a program type code. The system prompts you with translate values delivered with your system. These translate values are defined as valid for the Single Data Return Report and should not be modified.

Values are: *CPI* (certificate of personal interest), *Community*, and *Normal*.

**StudyLink Funding**

Select a code to indicate whether a program is eligible for StudyLink funding and, if it is, at which level.

Values are: *Allowance Only*, *Loans Only*, *Loans and Allowances*, and *Not Funded*.

**Course Classification**

Enter a course classification. These codes are assigned by the New Zealand Ministry of Education and are required for the Single Data Return. You define these codes in the Course Classification NZL component.

<b>Funding Category</b>	Enter a funding category. These codes are assigned by the New Zealand Ministry of Education and are required for the Single Data Return. Funding categories are tied to course classifications, so the course classification selected determines the available selections in this field. You define these codes in the Funding Category NZL component.
<b>Education Level</b>	No programming is tied to this field; use it for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these values.
<b>Report to MoE</b>	No programming is tied to this field; use it for informational purposes only. The check box is selected by default.

See *PeopleSoft Student Records 9.0 PeopleBook*, "(NZL) Generating Government Reports," Processing SDR Extracts.

### **See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "(NZL) Setting Up Government Reporting," Preparing for SDR Reporting

## **(NLD) Setting Up Home Campus Information**

Access the Home Campus NLD page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Home Campus NLD).

The screenshot displays the 'Home Campus NLD' page with the following information:

- Navigation:** Taxonomy/Campus, Repeat/Incomplete, Enrollment, Course, Dynamic Date, Home Campus NLD
- Academic Institution:** PSNLD PeopleSoft University - NLD
- Academic Program:** H001 Business Economics
- Effective Date:** 01/01/1900
- Status:** Active
- Program Norm Units Type:** Completion: Days
- Campus:** AMS Amsterdam Campus
- Academic Organization:** AGRIC Agriculture
- BRINcode:** NL01 NLD Brincode 01
- Sub BRINcode:** 02 02 Subbrincode
- Campus Academic Load:** Approved Academic Load: Full-Time

Home Campus NLD page

**BRINcode** Enter a BRINcode, which is defined by the Dutch Ministry of Higher Education and is used in CBAP (Centraal Bureau Aanmelding en Plaatsing).

You can map only Internal BRINcodes to an academic program.

**Sub BRINcode** You can select only those Sub BRINcodes that are mapped to the selected BRINcode. You map a Sub BRINcode to a BRINcode in the SUB-BRINCODE Table page.

## Defining Academic Plans

To set up academic plans, use the Academic Plan Table component (ACADEMIC\_PLAN\_TBL).

This section provides an overview of academic plans and discusses how to:

- Describe academic plans.
- Set up print options.
- Set up taxonomy.

- Establish academic organization ownership.
- (AUS) Set up Australian academic plans.
- (NZL) Set up New Zealand academic plans.

## Understanding Academic Plans

An academic plan is an area of study—such as a major, minor, or specialization—that is within an academic program *or* within an academic career. A student can earn only one degree for a single academic plan. If the institution offers dual degrees, you must establish separate academic plans for each degree or you must create a combined degree, such as B.A./B.S. You can set up academic plans to award degrees, indicate completion of the academic program, or award intermediate certificates or degrees.

## Pages Used to Define Academic Plans

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Plan Table	ACADEMIC_PLAN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Academic Plan Table	Describe academic plans, tie academic plans to an academic program or academic career, specify the degree offered, and provide other details.
Print Options	ACAD_PLAN_PRNT_OPT	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Print Options	Set up diploma and transcript printing options and text for academic plans.
Taxonomy	ACAD_PLAN_TAXONOMY	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Taxonomy	Set up academic plan taxonomy, including CIP codes, HEGIS codes, and fields of study, for academic plans.
Owner	ACAD_PLAN_OWNER	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Owner	Establish academic organization owners of the academic plan for reporting, analysis, and work distribution purposes.
Acad Plan AUS (academic plan Australia)	SSR_ACAD_PLAN_AUS	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Acad Plan AUS	Assign DEST codes to academic plans.

Page Name	Definition Name	Navigation	Usage
Acad Plan NZL (academic plan New Zealand)	SSR_ACAD_PLAN_NZL	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Acad Plan NZL	Assign New Zealand Ministry of Education (MoE) and New Zealand Vice-Chancellors' Committee (NZVCC) subject codes to the academic plan for government reporting.

## Describing Academic Plans

Access the Academic Plan Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Academic Plan Table).

Academic Plan Table
Print Options
Taxonomy
Owner

**Academic Institution:** PSUNV PeopleSoft University  
**Academic Plan:** BIOLBS

Find | View All
First
1 of 1
Last

**\*Effective Date:** 01/01/1900 BT **\*Status:** Active + -

**Academic Program:** LAU 🔍 Liberal Arts Undergraduate

**Academic Career:**

**\*Academic Plan Type:** Major ▼

**\*Description:** Biology (BS)

**Short Description:** Biol BS **First Term Valid:**  🔍

**Degree Offered:** BS 🔍 Bachelor of Science

**\*Req Term Default:** Program's Admit Term ▼

**\*Transcript Level:** Official ▼

**Last Prospect Date**  BT

**Last Admit Term** 0665 🔍 2011 Sum

**Evaluate Plan Before Program**

Academic Plan Table page

**Warning!** If you modified the academic program or academic career to which an academic plan belongs, you must first deactivate the academic plan by inserting a new row and entering the status of *inactive*. Then, you must add another new row to tie the academic plan to a different academic program or academic career. This procedure ensures proper functionality of academic plan prompts throughout the system.

<b>Academic Program</b>	Enter the academic program <i>or</i> an academic career to which this academic plan belongs. To require that a student be admitted to a specific academic program before declaring the academic plan, enter an academic program to link to this academic plan.
<b>Academic Career</b>	Enter an academic career to link to the academic plan if you want students in any academic career to be able to declare the academic plan. For example, an institution might enable all undergraduates to declare computer science as a major (academic plan), regardless of whether students are in a liberal arts program or an engineering program.
<b>Academic Plan Type</b>	Select a type for this academic plan, such as <i>Major</i> , <i>Minor</i> , or <i>Concentration</i> . You can modify these translate values.
<b>First Term Valid</b>	Enter the first term in which students can be admitted to the academic plan. You cannot admit students to the academic plan before the term that you specify. If you enter the term <i>0000</i> , you can admit students to the plan for any term. When you convert data to the PeopleSoft system, be sure that you select a first valid term that is appropriate for the preexisting data for each academic plan. This field is optional.
	<hr/> <b>Note.</b> Students can modify this plan when their admit term is prior to this term as long as the effective date of the modification is greater than or equal to the start date of this term. <hr/>
<b>Degree Offered</b>	Enter the degree offered for completion of the academic plan. If the institution offers dual degrees, you must establish separate academic plans for each degree or create a combined degree, such as B.A./B.S. The system creates degree records according to the definition of the academic plan. Therefore, if a student graduates with dual degrees and the degrees are the same—such as an English B.A. and a psychology B.A.—the system creates one degree record. However, if a student graduates with dual degrees and the degrees are different—such as an English B.A. and a biology B.S.—the system creates two degree records, one for each degree.
<b>Req Term Default</b> (requirement term default)	Select the default term for which the system begins accumulating requirements for the academic plan. You can override the default value for individual students on the Student Plan page. Modification to these translate values requires significant programming.
	<hr/> <b>Note.</b> Set this default so that, when you analyze completion requirements for an academic plan, you know which set of requirements to use. Requirements can change over time. <hr/>
<b>Transcript Level</b>	Select a transcript level to determine the types of transcripts on which the system includes the specified data. Values are: <i>Not Print</i> , <i>Official</i> , <i>Unofficial</i> , <i>Stdnt Life</i> (student life), and <i>Degr Prog</i> (degree progress).
<b>Last Prospect Date</b>	Enter the latest date that a plan can be populated for a new prospect record. You cannot assign a plan to a prospect if the system date is greater than the last prospect date.

**Last Admit Term**

Enter the last term in which students can be admitted to the academic plan. You cannot admit students to the academic plan after the term that you specify. The system will compare the admit term used in the student's application to this last term valid value. If the admit term is greater than this value, then the program is not available to the user. This field is optional.

**Evaluate Plan Before Program**

Select to alter reporting sequences. This check box is a feature of PeopleSoft Academic Advisement.

**See Also**

*PeopleSoft Academic Advisement 9.0 PeopleBook*, "Setting Up Academic Requirement Groups," Changes to Academic Structure Processing

## Setting Up Print Options

Access the Print Options page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Print Options).

The screenshot shows the 'Print Options' page for an academic plan. At the top, there are four tabs: 'Academic Plan Table', 'Print Options' (which is selected), 'Taxonomy', and 'Owner'. Below the tabs, the following information is displayed:

- Academic Institution:** PSUNV PeopleSoft University
- Academic Plan:** BIOLBS Biology (BS) Major

A navigation bar contains 'Find | View All' and 'First 1 of 1 Last'. Below this, the following fields are visible:

- Effective Date:** 01/01/1900
- Status:** Active
- Print on:**  Diploma  Transcript
- Diploma Description:** Biology (with a scrollable text area and an 'Indent:' field)
- Transcript Description:** Biology (with a scrollable text area and an 'Indent:' field)

Print Options page

**Diploma**

Select to print a description on the diplomas for students who complete the academic plan. The Diploma Description field becomes available.

**Transcript**

Select to print a description on the transcripts for students with the academic plan. The Transcript Description field becomes available.

**Diploma Description**

Enter the description of the academic plan. This description appears on the diplomas for students who complete the academic plan. The PeopleSoft system currently does not provide a process to print diplomas.



**Transcript Description**

Enter the description of the academic plan. This description appears on the transcripts for students with this academic plan. You can override this text when you prepare students' transcripts.

**Indent**

Enter the number of spaces that you want to indent the related description on the printed document.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "Setting Up Transcripts"

*PeopleSoft Student Records 9.0 PeopleBook*, "Producing Transcripts"

## Setting Up Taxonomy

Access the Taxonomy page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Taxonomy).

The screenshot displays the 'Taxonomy' tab within a software interface. At the top, there are navigation tabs: 'Academic Plan Table', 'Print Options', 'Taxonomy' (selected), and 'Owner'. Below the tabs, the following information is displayed:

- Academic Institution:** PSUNV, PeopleSoft University
- Academic Plan:** BIOLBS, Biology (BS), Major

A navigation bar includes 'Find | View All', 'First', '1 of 1', and 'Last'. Below this, the following fields are visible:

- Effective Date:** 01/01/1900
- Status:** Active
- CIP Code:** 26.0101 (with a search icon) Biology/Biological Sciences, G
- HEGIS Code:** (with a search icon)
- Field of Study:** (with a search icon)

At the bottom, there is a section titled 'Plan Prospectus' with a large empty text area and a vertical scrollbar on the right.

Taxonomy page

**CIP Code** (Classification of Institutional Programs code)

Enter the CIP code for this academic plan. CIP codes are delivered with the system as translate values. You can modify CIP codes on the CIP Code Table page.

**HEGIS Code** (Higher Education General Information Survey code)

Enter the HEGIS code for this academic plan. HEGIS codes are delivered with the system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.

**Field of Study** Enter a field of study for the academic plan.

**Plan Prospectus** Enter descriptions of the academic plan, such as information about special programs, faculty, and associated societies. You can then create a separate advisement report querying this field and print the report for brochures and other documentation.

## Establishing Academic Organization Ownership

Access the Owner page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Owner).

The screenshot shows the 'Owner' page for an academic plan. At the top, there are tabs for 'Academic Plan Table', 'Print Options', 'Taxonomy', and 'Owner'. Below the tabs, the following information is displayed:

- Academic Institution:** PSUNV PeopleSoft University
- Academic Plan:** BIOLBS Biology (BS) Major

Navigation options include 'Find | View All', 'First', '1 of 1', and 'Last'. Below this, the following details are shown:

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

The 'Ownership' section contains a table with the following data:

*Academic Organization	*Percent Owned		
BIOLOGY <input type="text"/>	Biology	100.000	+ -

Owner page

**Academic Organization (lower)** Enter the academic organization that owns this academic plan. Define academic organization values on the academic organization tree in PeopleSoft Tree Manager. Modify them in the Academic Organization Table component.

**Percent Owned** Enter the percentage of the academic plan for which the academic organization is responsible. Ownership of the academic plan can be split between academic organizations, but the total percentage must equal 100.

### See Also

[Chapter 13, "Securing Your Academic Institution," Securing Academic Organizations, page 269](#)

*PeopleTools PeopleBook: PeopleSoft Tree Manager*

## (AUS) Setting Up Australian Academic Plans

Access the Acad Plan AUS page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Acad Plan AUS).

Academic Plan Table	Print Options	Taxonomy	Owner	Acad Plan AUS	Acad Plan NZL
<b>Academic Institution:</b>	PSUNV	PeopleSoft University			
<b>Academic Plan:</b>	BUSADM	Business Administration		Major	
Find   View All    First ◀ 1 of 1 ▶ Last					
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active		
<input checked="" type="checkbox"/> <b>DEST Plan</b>					
<b>DEST Fields</b>					
<b>Specialization Code:</b>	<input type="text" value="040201"/>	<input type="button" value="🔍"/>	Business Admin.		
<b>Field of Study Code:</b>	<input type="text" value="040201"/>	<input type="button" value="🔍"/>	Business Admin.		
<b>Field of Education Code:</b>	<input type="text" value="080301"/>	<input type="button" value="🔍"/>	Business Management		
<b>Discipline Group Code:</b>	<input type="text" value="0501"/>	<input type="button" value="🔍"/>	Mathematics, Statistics		

Acad Plan AUS page

### DEST Plan

Select to activate the Field of Study Code, Field of Education Code, and Discipline Group Code fields. Select this check box to designate the plan for DEST reporting. The Course Code field in DEST reporting uses either the student's plan (when marked as a DEST plan) or the student's program. Course Code, element 307, is important for DEST reporting.

### DEST Fields

#### Specialization Code

Enter a specialization code for this academic plan. The drop-down list contains the Field of Study Classifications you set up.

#### Field of Study Code

Enter a field of study code for this academic plan. Define field of study codes on the Field of Study Table page.

---

**Note.** Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference.

---

**Field of Education Code** Enter a field of education code for this academic plan. This code is used to derive the DEST reporting element 464 Discipline Group Code. The element can be derived from either the plan or the course offering. Field of Education is defined by the Australian Standard Classification of Education as issued by the Australian Bureau of Statistics.

**Discipline Group Code** Enter a discipline group code for this academic plan. Define discipline group codes on the Discipline Group Code Table page.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook, "(AUS) Setting Up Government Reporting"*

## (NZL) Setting Up New Zealand Academic Plans

Access the Acad Plan NZL page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Acad Plan NZL).

Academic Plan Table		Print Options		Taxonomy		Owner		Acad Plan AUS		Acad Plan NZL	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University									
<b>Academic Plan:</b>	BUSADM	Business Administration								Major	
Find   View All    First ◀ 1 of 1 ▶ Last											
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active								
<b>*Subject Code - NZ MoE:</b>	<input type="text" value="MATH"/>		Mathematics								
<b>*NZVCC Subject Code:</b>	<input type="text" value="Ca17"/>		Taxation Studies								

Acad Plan NZL page

**Subject Code - NZ MoE** (New Zealand Ministry of Education subject codes) Enter a subject code; codes are defined by the New Zealand Ministry of Education. These codes are used in the Single Data Return Qualifications Completions file. You can create codes in the MoE Subject NZL component.

**NZVCC Subject Code** (New Zealand Vice-Chancellor's Committee subject codes) Enter a subject code; codes are used in the University Graduate Destinations Survey. You can create codes in the NZVCC Subject Codes NZL component.

**See Also**

*PeopleSoft Student Records 9.0 PeopleBook, "(NZL) Setting Up Government Reporting"*

## Defining Academic Subplans

To set up academic subplans, use the Academic SubPlan Table component (ACAD\_SUBPLN\_TBL).

This section provides an overview of academic subplans and discusses how to:

- Describe academic subplans.
- Set up taxonomy.

## Understanding Academic Subplans

Academic subplans are areas of further specialization within academic plans, and they are tied to academic plans. You can define an academic subplan as a minor, a concentration, or a specialization. For example, a major in English might have additional work associated with it so that students can concentrate in creative writing. Similarly, a Ph.D. program in mathematics might have specializations in computer science and physics.

Determining whether to create academic subplans as minors is dictated by the academic plan and the academic structure. For instance, if students can minor in creative writing only if they major in English, then you would define the creative writing minor as a subplan and link it to the English academic plan. If students can minor in creative writing regardless of their major, then you would define creative writing as a minor on the Academic Plan Table page.

## Pages Used to Define Academic Subplans

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Sub-Plan Table	ACAD_SUBPLAN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Academic Sub-Plan Table	Describe academic subplans, and establish diploma and transcript printing options and text for academic subplans.
Academic Sub-Plan Taxonomy	ACAD_SUBPLAN_TXNMY	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Academic Sub-Plan Taxonomy	Set up taxonomy for academic subplans, including CIP codes and HEGIS codes for academic plans.

## Describing Academic Subplans

Access the Academic Sub-Plan Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Academic Sub-Plan Table).

Academic Sub-Plan Table		Academic Sub-Plan Taxonomy	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University	
<b>Academic Plan:</b>	ENGL-PHD	English-PhD	Major
<b>Academic Sub-Plan:</b>	CMPLT		
Find   View All    First ◀ 1 of 1 ▶ Last			
<b>*Effective Date:</b>	01/01/1900	<b>*Status:</b>	Active
<b>Sub-Plan Type:</b>	Concentration		
<b>*Description:</b>	Comparative Lit		
<b>Short Description:</b>	CmpLit	<b>First Term Valid:</b>	<input type="text"/>
<b>Default of Req Term:</b>	Program's Admit Term		
<b>Last Prospect Date</b>	<input type="text"/>		
<b>Last Admit Term</b>	0680	2012 Spr	
	<input type="checkbox"/> Evaluate SubPlan Before Plan		
<b>Print on:</b>	<input type="checkbox"/> Diploma	<input type="checkbox"/> Transcript	<b>*Transcript Level:</b> Official

Academic Sub-Plan Table page

**Sub-Plan Type**

Enter a type for the academic subplan. You can modify these translate values.

**First Term Valid**

Enter the first term in which students can be admitted to the academic subplan. You cannot admit students to the academic subplan before the term that you specify. If you enter the term 0000, you can admit students to the subplan for any term. When you convert data to the PeopleSoft system, be sure that you enter a first valid term that is appropriate for the preexisting data for the academic subplan. This field is optional.

---

**Note.** Students can modify this subplan when their admit term is prior to this term as long as the effective date of the change is greater than or equal to the start date of this term.

---

**Default of Req Term** (default of requirement term)

Select the default term for which the system begins accumulating requirements for the academic subplan. You can override the default value for individual students on the Student Sub-Plan page. Modification of these translate values requires significant programming effort.

---

**Note.** Set a default here so that when you analyze completion requirements for an academic subplan, you know which set of requirements to use. Requirements can change over time.

---

**Last Prospect Date**

Enter the latest date that a subplan can be populated for a new prospect record. You cannot assign a program to a subplan if the system date is greater than the last prospect date.

<b>Last Admit Term</b>	Enter the last term in which students can be admitted to the academic subplan. You cannot admit students to the academic subplan after the term that you specify. The system will compare the admit term used in the student's application to this last term valid value. If the admit term is greater than this value, the program is not available to the user. This field is optional.
<b>Evaluate SubPlan Before Plan</b>	Select to alter reporting sequences. This check box is a feature of Academic Advisement.
<b>Diploma</b>	Select to print a description on student diplomas. The Diploma Description field becomes available.
<b>Transcript</b>	Select to print a description on student transcripts. The Transcript Description field becomes available.
<b>Diploma Description</b>	Enter the description of the academic subplan. This description appears on student diplomas. The PeopleSoft system currently does not provide a process to print diplomas.
<b>Transcript Description</b>	Enter the description of this academic subplan. This description appears on student transcripts. You can override this text when you prepare students' transcripts.
<b>Indent</b>	Enter the number of spaces that you want to indent the related description when printing the document.

### **See Also**

*PeopleSoft Academic Advisement 9.0 PeopleBook*, "Setting Up Academic Requirement Groups," Changes to Academic Structure Processing

*PeopleSoft Student Records 9.0 PeopleBook*, "Producing Transcripts"

## **Setting Up Taxonomy**

Access the Academic Sub-Plan Taxonomy page (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Academic Sub-Plan Taxonomy).

Academic Sub-Plan Table		Academic Sub-Plan Taxonomy	
<b>Academic Institution:</b>	PSUNV	PeopleSoft University	
<b>Academic Plan:</b>	PSYCH	Psychology	Major
<b>Academic Sub-Plan:</b>	DEVLP	Developmental Psychology	
Find   View All First 1 of 1 Last			
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active
<b>Taxonomy</b>			
<b>CIP Code:</b>	<input type="text" value="42.0701"/>		Developmental and Child Psycho
<b>HEGIS Code:</b>	<input type="text"/>		
<b>Specialization Code:</b>	<input type="text" value="030215"/>		Psychology

Academic Sub-Plan Taxonomy page

**CIP Code** (Classification on International Programs code) Enter the CIP code for the academic subplan. CIP code. Values are delivered with the PeopleSoft system as translate values. You can modify CIP codes on the CIP Code Table page.

**HEGIS Code** (Higher Education General Information Survey code) Enter the HEGIS code for this academic subplan. HEGIS codes are delivered with the PeopleSoft system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.

**(AUS) Specialization Code** Enter the specialization code for the academic subplan. The specialization code is reported in element 463 of the DEST Past Course Completions File.



## Chapter 11

# (AUS) Setting Up Government Reporting

This chapter provides an overview of setting up government reporting for Australian customers and discusses how to set up general reporting codes used by multiple Campus Solutions products.

### **See Also**

*PeopleSoft Student Records 9.0 PeopleBook*, "(AUS) Setting Up Government Reporting"

*PeopleSoft Student Records 9.0 PeopleBook*, "(AUS) Generating Government Reports"

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## Understanding Australian Government Reporting

There are several Australian government departments that require institutions to submit information about students. The Department of Education, Science, and Training (DEST), the Australian Tax Office, and Centrelink all require institutions to send periodic reports. The reporting codes you set up will be useful in creating reports for DEST, Higher Education Contribution Scheme (HECS) liabilities, and Centrelink.

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## Setting Up Reporting Codes

This section discusses how to set up Australian government reporting codes.

## Pages Used to Set Up Reporting Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Field of Study AUS	SSR_FOS_TBL	Set Up SACR, Foundation Tables, Reporting Codes, Field of Study AUS, Field of Study AUS	<p>Define field of study codes. These codes are provided by DEST. Field of study codes identify the primary field of study and the supplemental field of study for a program. Assign field of study codes to academic programs on the Acad Prog AUS page in the Academic Program Table component. Also, assign field of study codes to academic subjects on the Subject Taxonomy page.</p> <p><b>Note.</b> Field of study codes have been replaced by field of education codes for terms after year 2000. Field of study codes are retained for historical reference.</p>
Field of Education AUS	SSR_FOE_TBL	Set Up SACR, Foundation Tables, Reporting Codes, Field of Education AUS, Field of Education AUS	<p>Define field of education codes. These codes are provided by DEST. Field of education codes identify the primary field of education and the supplemental field of education for a program. Assign field of education codes to academic programs on the Acad Prog AUS page in the Academic Program table component. Also, assign field of education codes to academic subjects on the Subject Taxonomy page.</p>
Discipline Group Table AUS	SSR_DSCP_GROUP_CD	Set Up SACR, Foundation Tables, Reporting Codes, Discipline Group Table AUS	<p>Define discipline group codes. These codes must be consistent with the classification of higher education discipline groups. Assign discipline group codes to academic subjects on the Subject Taxonomy page and to academic plans on the Acad Plan AUS page.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
AOU Code Table AUS	SSR_AOU_CD_TBL	Set Up SACR, Foundation Tables, Reporting Codes, AOU Code Table AUS	Define academic organization unit (AOU) codes. Assign AOU codes to academic organizations on the Academic Organization Table page.
Program Code Table AUS	SSR_PRG_CD_TBL	Set Up SACR, Foundation Tables, Reporting Codes, Program Code Table AUS	Assign program codes to academic program TAC Mapping Program Code field on the Academic Program component.
Program Type Table AUS	SSR_PRG_TYP_TBL	Set Up SACR, Foundation Tables, Reporting Codes, Program Type Table AUS, Program Type Table AUS	Define program type codes. These codes are provided by DEST. Assign program type codes to academic programs on the Acad Prog AUS page in the Academic Program Table component.

## Defining Field of Education Codes

Access the Field of Education AUS page (Set Up SACR, Foundation Tables, Reporting Codes, Field of Education AUS, Field of Education AUS).

### Field of Education AUS

**Field of Education Code:** 010101

Find | View All First 1 of 1 Last

<b>*Effective Date:</b>	<input type="text" value="01/01/1900"/>		<b>*Status:</b>	<input type="text" value="Active"/>
<b>*Description:</b>	<input type="text" value="Mathematics"/>			
<b>*Short Description:</b>	<input type="text" value="Mathematic"/>			
<b>HECS Band ID:</b>	<input type="text" value="Band 2"/>			

Field of Education AUS page

### HECS Band ID

Assign a HECS band ID to this field of education code.

## Defining Program Type Tables

Access the Program Type Table AUS page (Set Up SACR, Foundation Tables, Reporting Codes, Program Type Table AUS, Program Type Table AUS).

The screenshot shows the 'Program Type Table AUS' page. At the top, the title 'Program Type Table AUS' is displayed in blue. Below the title, the 'Program Type Code' is set to '01'. A navigation bar includes 'Find | View All', 'First', '1 of 1', and 'Last'. The main form contains the following fields: '\*Effective Date:' with the value '01/01/1900' and a calendar icon; '\*Status:' with a dropdown menu set to 'Active'; '\*Description:' with the text 'Higher Doctorate'; and 'Short Description:' with the text 'Higher Doc'. At the bottom, there is a checked checkbox labeled 'Non DEST Program Code'.

Program Type Table AUS page

**Non DEST Program Code** Select this check box to identify the program type as a non-DEST program type. Enrollments in programs of this type are not included in DEST reports.

## Chapter 12

# Introducing Security for Your System

This chapter provides overviews of application security and security vocabulary and discusses how to specify row-level security options.

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## Understanding Application Security

PeopleSoft applications use the capabilities and flexibility of multilevel security to provide an efficient, effective security solution. When you manage an environment with shared data, you need a security system that protects data at various access levels. You also need the flexibility to define the most effective and efficient path to that data across business groups, tables, departments, pages, and so forth. PeopleSoft uses an approach that enables you to set up data access at different entry points within the system.

Security access falls into three categories:

- Network security.
- Database security.
- PeopleSoft application security.

Network security controls the overall point of entry into system hardware and software. Database security narrows the scope of user access to information. Application security enables you to control access down to the level of an individual field.

Most system users typically have access to a defined set of functions, pages, or fields that enable them to perform their jobs. Examples of such users are:

- Auditors who must review inquiry pages and generate reports.
- Users who run PeopleSoft business processes.
- Management information systems staff members who configure and maintain pages and records.

In PeopleSoft applications, you have full control over security definitions and how they fit together. The security options that you enter create a matrix that enables or blocks user access to data through a series of authorizations. Users pass through several levels of authorizations before the system grants them access to any subset of the data.

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**Important!** Creating security for prompt values or rows of data is *not* the same as giving security access to pages, which you do in PeopleTools. Giving users access to pages by using PeopleTools is required in addition to the security setup discussed in this chapter.

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## Understanding Security Vocabulary

Make sure that you understand the security terms and functions for each level of the system:

<b><i>Security Type</i></b>	<b><i>Where Implemented</i></b>	<b><i>Function</i></b>
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
Relational database management system (RDBMS)	Operating system	Controls access to the database.
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups used in application development.
Query	PeopleTools	Defines which set of table rows a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Controls access to the subset of data rows within tables to which the user has authority.
Field-level	PeopleCode	Controls access to individual fields within pages.

---

## Specifying Row-Level Security Options

This section provides an overview of row-level security and discusses how to:

- Maintain row-level security.
- Set up row-level security views.
- Define row-level security for users.

**See Also**

*PeopleTools PeopleBook: Security Administration*

**Understanding Row-Level Security**

To establish security within the PeopleSoft application, decide what level of security to establish throughout the system, which key fields to secure, and whether security will be handled through user IDs or roles. Security can restrict individual users or roles from specific rows of data that are controlled by such key fields as setID and business unit. You can also limit user access to a specific subset of rows. For example, user ID security can allow the law school to access only the item types assigned for the law school. Or, if you have a group of staff in the registrar's office, you can add them all to a role and use role security to enforce the appropriate limits on their system access. A user may be assigned to one or more roles, providing considerable flexibility to access necessary resources. As a result, a user who is linked to more than one role can use the menu items assigned to any of those roles. Some security attributes—such as row-level security—cannot be defined by combining roles. Only one role can be used for this purpose. In PeopleTools, Maintain Security, you designate row-level security for a user by selecting a role. The row-level security attributes for the role that you select then become the security attributes for that user.

Because various combinations of security are possible, it is important to understand the effects of row-level security when you use this mix of system security options and roles:

<b>System Security</b>	<b>Role of User ID</b>	<b>Row-Level Security</b>
No security	User ID is not linked to a role.	Not applicable; each user can access any object because there is no security implemented.
User-level security	User ID is not linked to a role.	Defined in the application by key field security.
Role-level security	A user ID is normally assigned to a row-level security role. It is possible, however, to link a user ID to multiple roles, but not when you specify row-level security.	Defined by a row-level security role.  If a user ID is not assigned to a row-level security role, then that user has access to menu items, but does not have access to any application pages with key fields enabled for row-level security.

You must set up which users or roles have access to specific business units, setIDs, and any other key fields that the application requires. For example, you might permit access to only one business unit for a certain role of users.

When a user in this role enters data, the system requires a business unit because this is the primary key for data related to the business unit. The available selections on the prompt list for this user include only the business units for which the user has been granted authority. What appears in the prompt list is data that has been filtered through one or more levels of security.

## Maintaining Row-Level Security

The number of users assigned the same level of security should be a key factor in determining whether the type of security should be based on user ID or role maintenance. If thousands of users have identical access requirements, then exploring roles is a good idea. By assigning users to a single role, subsequent changes in access requirements for these users can be made once rather than multiple times.

## Setting Up Row-Level Security Views

Business units and tableset IDs are maintained in edit tables and can be used as primary keys throughout the system. When a field uses an edit table to select values, you are limited to selecting only the values that have already been defined for that edit table. PeopleSoft row-level application security, when activated, enables you to specify values from the edit table, so that only those Values are: available in a particular view. Think of views as a means to access data horizontally across more than one table. Views are Structured Query Language statements that filter out data rows whose key Values are: not needed as valid access parameters. The result is that users who are authorized to access setIDs or business units see only a subset of the values from these edit tables. After these views are set up, you can specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from a particular role.

### **See Also**

*PeopleTools PeopleBook: PeopleCode Language Reference, "PeopleCode Built-in Functions"*

## Defining Row-Level Security for Users

After you select security options and set up security view names, you are ready to define the actual secured field values used by each user or role. When you secure key fields in the application, the page that you use depends on which level of system security you select. If you select user-level security, you utilize user security pages. If you select role-level security, you use the permission list security pages.



## Chapter 13

# Securing Your Academic Institution

This chapter discusses how to:

- Secure access to student data.
- Secure academic structure.
- Secure academic organizations.

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## Securing Access to Student Data

To set up student data security access, use the Security Views component (ES\_SECURITY\_TBL), the Security Views Update component (RUNCTL\_SRSECVWU), and the Security View Change Audit component (SECURITY\_AUDIT).

You can secure a user's access to pages that contain student information.

This section provides an overview of security for access to student data, lists prerequisites (including delivered security views), and discusses how to:

- Set component security.
- Run the Security Views Update SQR process (SRSECVWU) and report.
- Specify search parameters for security view changes.
- Review security table audit information.
- Review security detail audit information.
- Set advisement report security.

## Understanding Security for Access to Student Data

The Component Security feature provides the option to impose security on selected components, based on a student's institution, campus, career, program or plan. You set the specific security level on the Security Views page. The security level determines which search record (or security view) is used when the user attempts to access the component. Select *No Security* to retain the original search records that are delivered with the system. The security views delivered with this feature enable the system to verify that the user has access to the appropriate institution, campus, career, program, or plan to view, update, or add data relating to a student's record.

The security level becomes effective only after you run the Security Views Update process. This process exchanges the original search record with one of the delivered security views for a component (if you select the Global Security option) or a specific menu item. In the latter case, the component search record is overridden only on the specific menu item with one of the security views. Consequently, you can impose different levels of security for components that are accessed using different navigation paths.

After you have created security views for the institution and applied views for components that you want to secure, you can use the Security View Change Audit component to view the details of any changes to those settings. For example, you can view the user ID, date of action and action taken, and the security level settings for a particular component. You can see when the security view was created, updated, or deleted, and you can view the state of the record before and after a change. A check box on the Search Criteria page controls how the system returns values that match the selection criteria.

---

**Note.** This feature should not be used to update search record security for self-service features.

---

You complete these steps to secure access to student data:

1. Identify and define levels of security for a component on the Security Views page.
2. Update security definitions by running the Security Views Update process on the Security Views page.
3. (Optional) Perform an audit of changes to security in the Security View Change Audit component.

## Prerequisites

Before you implement component security, identify people at the institution who have both technical and functional expertise and who can review this feature. Although the Component Security feature is functional in application, it is quite technical in design and implementation. The individuals assigned to evaluate, incorporate, and support this feature must not only understand the way staff and faculty interact with student-centered components at the institution, they must also have a solid understanding of table structures, security views, and page caching. A working knowledge of managing version control and PeopleSoft lock records is also useful.

Begin the review process by thoroughly investigating delivered security views for all tables. To do this, run the Security Views report with the Report Only option selected. Notice in the report that the majority of delivered component security views are not set at the global level but at the menu item level. Also most of the delivered views are limited to PeopleSoft Academic Advisement, PeopleSoft Recruiting and Admissions, PeopleSoft Campus Community, and PeopleSoft Student Records. Every delivered security view is set to a value of *None*. This means that no security is implemented (other than standard preexisting people search filters) until you modify this setting for every component that you want to secure. Familiarize yourself with the different levels of security that are available, and decide which levels work for the components at the institution.

Upon review of the delivered security views, evaluate and set the security-level settings for all components. Again, all delivered component views have the security level *None*, so you must update this value and assign data in the Security Views fields accordingly. You can modify these settings at any time, but you must run the Security Views Update process to activate the changes.

---

**Note.** PeopleSoft delivers security views setup data for some Financial Aid components and most of the Campus Community components within the Campus Community student-only menus. These secure views restrict access to student data for specific user IDs by institution, campus, career, program, and plan. Note that applying component security is optional, and applies only to schools that set up security for Financial Aid, Campus Community, and Enrollment Services tasks.

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See [Chapter 14, "Securing Campus Community," Applying Demographic Data Access Security, page 284.](#)

The following table lists the default settings for the Financial Aid components that have security views. These are the default component settings delivered on the Security Views page. All components in the table display the following security settings:

- Security Level = *No Security*
- Global Security = Yes (selected)

Component names with an asterisk (\*) also display the following security setting: Exclude Add Searchrecord = Yes (selected).

<b>Component Name</b>	<b>No Security View</b>	<b>Institution Security View</b>	<b>Campus Security View</b>	<b>Career Security View</b>	<b>Program Security View</b>	<b>Plan Security View</b>
ANTICIPATED_AID	STDNT_ANT_SRCH1	STUAN1_INS_SCTY	SFA_SN1_CMP_STY	STUAN1_CAR_SCTY	STUAN1_PRG_SCTY	STUAN1_PLN_SCTY
ANTICIPATED_AID_EDIT	STDNT_ANT_SRCH2	STUAN2_INS_SCTY	SFA_SN2_CMP_STY	STUAN2_CAR_SCTY	STUAN2_PRG_SCTY	STUAN2_PLN_SCTY
ANTICIPATED_AID_SUMM	STDNT_ANT_SRCH2	STUAN2_INS_SCTY	SFA_SN2_CMP_STY	STUAN2_CAR_SCTY	STUAN2_PRG_SCTY	STUAN2_PLN_SCTY
AS_OF_STATUS	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_ACTIVITY	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_ENTRY_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_MANUAL_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_NOTIF_DETAIL	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_NOTIF_INQ	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_OVERRIDE_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_SUMMARY	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
DISBURSE_AID	STDNT_DISB_SRCH	STUDSB_INS_SCTY	SFA_SDB_CMP_STY	STUDSB_CAR_SCTY	STUDSB_PRG_SCTY	STUDSB_PLN_SCTY
DISBURSE_AID_WO	STDNT_DISB_SRCH	STUDSB_INS_SCTY	SFA_SDB_CMP_STY	STUDSB_CAR_SCTY	STUDSB_PRG_SCTY	STUDSB_PLN_SCTY

<b>Component Name</b>	<b>No Security View</b>	<b>Institution Security View</b>	<b>Campus Security View</b>	<b>Career Security View</b>	<b>Program Security View</b>	<b>Plan Security View</b>
FA_EARNINGS	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
INST_ADD	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
ISIR_ADD_SCHOOL	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
ISIR_AUDIT	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
ISIR_DELETE_PG	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
LOAN_FUND_MAINT	LN_CL_FUND_SRCH	LNCLFN_INS_SCTY	SFA_LCN_CMP_STY	LNCLFN_CAR_SCTY	LNCLFN_PRG_SCTY	LNCLFN_PLN_SCTY
LOAN_ORIG*	LOAN_UPD_SRCH	LN_UPD_INS_SCTY	SFA_LUD_CMP_STY	LN_UPD_CAR_SCTY	LN_UPD_PRG_SCTY	LN_UPD_PLN_SCTY
LOAN_ORIG_TRANS	LN_CL_TRNS_SRCH	LNCLTR_INS_SCTY	SFA_LCT_CMP_STY	LNCLTR_CAR_SCTY	LNCLTR_PRG_SCTY	LNCLTR_PLN_SCTY
LOAN_STDNT_AWD	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
LOAN_TRANS_INQ	LOAN_UPD_SRCH	LN_UPD_INS_SCTY	SFA_LUD_CMP_STY	LN_UPD_CAR_SCTY	LN_UPD_PRG_SCTY	LN_UPD_PLN_SCTY
REVIEW_USER_EDITS*	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
RUN_VERIFICATION	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
SFA_CRC_PNOTE_ALT	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
SFA_CRC_PNOTE_PLUS	STDNT_AID_SRCH	TUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
SFA_CRC_PNOTE_STAF	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
SS_FA_AUS_TATUS	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY

<b>Component Name</b>	<b>No Security View</b>	<b>Institution Security View</b>	<b>Campus Security View</b>	<b>Career Security View</b>	<b>Program Security View</b>	<b>Plan Security View</b>
STDNT_AID_PACKAGE	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_AWARD_PER_RSRC	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_AWARD_CATG	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_AWARD_INQUIRY	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_BDGT_ADJUST	STDNT_AWARD_PER_VW	SAWPER_INS_SCTY	SFA_SWP_CMP_STY	SAWPER_CAR_SCTY	SAWPER_PRG_SCTY	SAWPER_PLN_SCTY
STDNT_BDGT_CALC	STDNT_BDGT_SRCH	STUBGT_INS_SCTY	SFA_SBG_CMP_STY	STUBGT_CAR_SCTY	STUBGT_PRG_SCTY	STUBGT_PLN_SCTY
STDNT_BUDGET_SUMM	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_DISB	STDNT_DISB_SCH2	STUDS2_INS_SCTY	SFA_SD2_CMP_STY	STUDS2_CAR_SCTY	STUDS2_PRG_SCTY	STUDS2_PLN_SCTY
STDNT_FA_TERM	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_FAN_ATTRBT	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_PKG_VARS	STDNT_PKG_SRCH	STUPKG_INS_SCTY	SFA_SPG_CMP_STY	STUPKG_CAR_SCTY	STUPKG_PRG_SCTY	STUPKG_PLN_SCTY
STDNT_RES_TRCTD_AID	STDNT_AID_SRCH	STUAID_INS_SCTY	SFA_STA_CMP_STY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_TERM_BUDGET	STDNT_BDMT_SRCH	STUBMT_INS_SCTY	SFA_SBT_CMP_STY	STUBMT_CAR_SCTY	STUBMT_PRG_SCTY	STUBMT_PLN_SCTY

The following table lists the default settings for the Campus Community components in the student-only menus that have security views. These are the default component settings delivered on the Security Views page. All components in the table display the following security settings:

- Security Level = *No Security*
- Global Security = No (cleared)
- Exclude Add Searchrecord = No (cleared)
- No Security View = STUDENT\_SRCH

- Institution Security View = CC\_STU\_INS\_SCTY
- Career Security View = CC\_STU\_CAR\_SCTY
- Program Security View = CC\_STU\_PRG\_SCTY
- Institution Security View = CC\_STU\_PLN\_SCTY

<b>Component Name</b>	<b>Menu Name</b>	<b>Application Designer Bar Name</b>
ADDRESS_MAINT	CC_BIO_DEMO_DATA_STDNT	USE
CC_ADDR_SEASONAL	CC_BIO_DEMO_DATA_STDNT	USE
CITIZEN_PASSPORT	CC_IDENTIFICATION_DATA_STDNT	USE
DRIVER_LIC_SA_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
ETHNIC_DTL_PERS	CC_BIO_DEMO_DATA_STDNT	USE
EXT_SYS_ID_PERS	CC_SERVICES_DATA_STDNT	USE
E_MAIL_ADDR_PERS	CC_BIO_DEMO_DATA_STDNT	USE
FERPA_ADMIN_QENTRY	CC_SERVICES_DATA_STDNT	USE
FERPA_DISPL_PERS	CC_SERVICES_DATA_STDNT	INQUIRE
FERPA_PERS	CC_SERVICES_DATA_STDNT	USE
HNR_AWD_PERS	CC_PARTICIPATION_DATA_STDNT	USE
IMMUNIZATN_HEALTH	CC_HEALTH_DATA_STDNT	USE
INST_REL_PERS	CC_SERVICES_DATA_STDNT	USE
LS_EXTRA_ACTIVITY	CC_PARTICIPATION_DATA_STDNT	USE
LS_PUBLICATIONS	CC_PARTICIPATION_DATA_STDNT	USE
NAMES_PERS	CC_BIO_DEMO_DATA_STDNT	USE
PEOPLE_ATHL_PERS	CC_PARTICIPATION_DATA_STDNT	USE
PEOPLE_PHTO_PERS	CC_IDENTIFICATION_DATA_STDNT	USE

<b>Component Name</b>	<b>Menu Name</b>	<b>Application Designer Bar Name</b>
PHONE_PERS	CC_BIO_DEMO_DATA_STDNT	USE
PIN_PERS	CC_SERVICES_DATA_STDNT	USE
RELATIONSHIPS	CC_BIO_DEMO_DATA_STDNT	USE
RELIG_PREF_PERS	CC_BIO_DEMO_DATA_STDNT	USE
RESIDENCY_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
SA_DECEASED_DATA	CC_SERVICES_DATA_STDNT	USE
SCC_ACCOM_REQUEST	CC_HEALTH_DATA_STDNT	USE
SCC_BIO_DEMO	CC_BIO_DEMO_DATA_STDNT	USE
SCC_EMERG_CNTCT	CC_BIO_DEMO_DATA_STDNT	USE
SCC_HS_EXAM_AUDIO	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_EYE	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_PHYS	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_RESP	CC_HEALTH_DATA_STDNT	USE
SCC_IMPAIR_DTL	CC_HEALTH_DATA_STDNT	USE
SCC_LANGUAGES_PERS	CC_BIO_DEMO_DATA_STDNT	USE
SCC_LICENSE_CERT	CC_PARTICIPATION_DATA_STDNT	USE
SCC_MEMBERSHIPS	CC_PARTICIPATION_DATA_STDNT	USE
SERVICE_IND_PERS	MAINTAIN_SERVICE_IND_STDNT	USE
SSR_STDN_DATA_DEST	CC_BIO_DEMO_DATA_STDNT	USE
VISA_PERMIT_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
WORK_EXPERIENCE	CC_BIO_DEMO_DATA_STDNT	USE

Refer to the following book to learn more about how the system renders Application Designer menus through the portal.

See *PeopleTools PeopleBook: PeopleSoft Application Designer Developer's Guide*.

This table lists the default settings for the Enrollment Services components that have security views. If no menu or Application Designer Bar Name is listed, then the value for Global Security = Yes (selected).

<b>Component Name</b>	<b>Menu Name</b>	<b>App. Designer Bar Name</b>	<b>No Security View</b>	<b>Institution Security View</b>	<b>Campus Security View</b>	<b>Career Security View</b>	<b>Program Security View</b>	<b>Plan Security View</b>
ACADEMIC_DEGREE			STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ACAD_HISTORY_PERS	PROCESS_TRANSFER_CREDIT	USE	PEOPLE_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ACAD_PLAN			STDNT_CAR_SRCH	STUCAR_INS_SEC	SSR_SCAR_CMP_SEC	STUCAR_CAR_SEC	STUCAR_PRG_SEC	STUCAR_PLN_SEC
ACAD_TST_RSLT_PERS	PROCESS_TRANSFER_CREDIT	USE	PEOPLE_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ACAD_TST_SUM_PERS	PROCESS_TRANSFER_CREDIT	INQUIRE	PEOPLE_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ADM_APP_L_SUMM			PEOPLE_SRCH	STDNT_INS_SCRTY	No Campus security view delivered	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
APPOINTMENTS			STDNT_TERM_SRCH	STUTRM_INS_SEC	SSR_STM_CMP_SEC	STUTRM_CAR_SEC	STUTRM_PRG_SEC	STUTRM_PLN_SEC
CHKLST_SUMM_PERS	TRACK_STUDENT_CAREERS	INQUIRE	STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY



<b>Component Name</b>	<b>Menu Name</b>	<b>App. Designer Bar Name</b>	<b>No Security View</b>	<b>Institution Security View</b>	<b>Campus Security View</b>	<b>Career Security View</b>	<b>Program Security View</b>	<b>Plan Security View</b>
COMM_SUMMARY_PERS	TRACK_STUDENT_CAREERS	INQUIRE	STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
ENRL_REQUEST			ENRL_REQ_SRCH	ENRLR_EQ_INS_SEC	SSR_ERQ_CMP_SEC	ENRLR_EQ_CAR_SEC	ENRLR_EQ_PRG_SEC	ENRLR_EQ_PLN_SEC
HNR_AWD_EXT_PERS	MANAGE_ACADEMIC_RECORDS	USE	STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
HNR_AWD_EXT_PERS	TRACK_STUDENT_CAREERS	USE	STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
INSTR_ADVISOR_PERS	DEFINE_STUDENT_RECORDS	SETUP	PEOPLE_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
OPR_3C_SUM_PERS	TRACK_STUDENT_CAREERS	INQUIRE	STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
SERVICE_IND_PERS	TRACK_STUDENT_CAREERS	USE	STDNT_SRCH	STDNT_INS_SCRTY	SCC_STU_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_ADVISOR			STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_CAREER			STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY

<b>Component Name</b>	<b>Menu Name</b>	<b>App. Designer Bar Name</b>	<b>No Security View</b>	<b>Institution Security View</b>	<b>Campus Security View</b>	<b>Career Security View</b>	<b>Program Security View</b>	<b>Plan Security View</b>
STDNT_CONS_STAT			STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_ENRL_INQ			STDNT_TERM_SRCH	STUTRM_INS_SEC	SSR_STM_CMP_SEC	STUTRM_CAR_SEC	STUTRM_PRG_SEC	STUTRM_PLN_SEC
STDNT_GRADE_INQ			STDNT_TERM_SRCH	STUTRM_INS_SEC	SSR_STM_CMP_SEC	STUTRM_CAR_SEC	STUTRM_PRG_SEC	STUTRM_PLN_SEC
STDNT_INCOMPLETE			STDNT_INC_SRCH	STDINC_INS_SEC	SSR_SIN_CMP_SEC	STDINC_CAR_SEC	STDINC_PRG_SEC	STDINC_PLN_SEC
STDNT_TERM_SEARCH			STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_XTRACT_PERS			STDNT_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STUDENT_MILESTONE1			STDNT_MLST_SRCH	STDMLST_INS_SEC	SSR_SML_CM_P_SEC	STDMLST_CAR_SEC	STDMLST_PRG_SEC	STDMLST_PLN_SEC
TERM_HISTORY			STDNT_TERM_SRCH	STDNT_INS_SCRTY	SSR_STD_CMP_STY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
TSCRIPT_TEXT			STDNT_CAR_SRCA	STUCAR_INS_SEC	SSR_SCRC_CMP_SEC	STUCAR_CAR_SEC	STUCAR_PRG_SEC	STUCAR_PLN_SEC

Refer to the following book to learn more about how the system renders Application Designer menus through the portal.

See *PeopleTools PeopleBook: PeopleSoft Application Designer*.

The components below display the following security settings: Exclude Add Searchrecord = Yes (selected):

- ACAD\_PLAN
- ENRL\_REQUEST
- LOAN\_ORIG
- REVIEW\_USER\_EDITS
- STUDENT\_MILESTONE1

You can create additional security for components not included in the PeopleSoft-delivered set, using one of two methods:

- If the component already uses one of the search records listed in the previous table, add the component using the Security Views page and enter all of the corresponding views in the Security Views group box.

Use the table as the template.

- If the component uses a search record other than those listed in the previous table, you can create modified security views for institution, campus, career, program, and plan security.

Add the component using the Security Views page and enter all of its corresponding modified views in the Security Views group box.

## Pages Used to Secure Access to Student Data

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Security Views	ES_SECURITY_TBL	Set Up SACR, Security, Secure Student Administration, User ID, Security Views, Security Views	Set component security and identify student-related components to which you want to assign security. In addition, specify the level of security (institution, campus, career, program, plan) that you want to use.
Security Views Update	RUNCTL_SRSECVWU	Set Up SACR, Security, Secure Student Administration, Process, Security Views Update, Security Views Update	Run the Security Views Update process after you set up or alter security views. Create the Security Views summary report for all security views at the institution.
Search Criteria	SECURITY_AUDIT	Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Search Criteria	Specify search parameters for component security view changes.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Security Table	AUD_SECURITY_TBL	Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Security Table	Review security table audit information about security view changes that match the selection criteria specified on the Search Criteria page. This page displays any changes made to the Add Search record setting for the table.
Security Detail	AUD_SECURITY_DTL	Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Security Detail	Review security detail audit information about security view changes that match the selection criteria specified on the Search Criteria page. Security detail values correspond to the parent record on the Security Table page.
Advisement Report Security	SAA_SCRTY_AARPT	Set Up SACR, Security, Secure Student Administration, User ID, Advisement Report Security, Advisement Report Security	Set advisement reports security.

## Setting Component Security

Access the Security Views page (Set Up SACR, Security, Secure Student Administration, User ID, Security Views, Security Views).

When you search for existing values before accessing this page, you can search by *Institution Security View*.

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**Note.** Adding components to the Security Views page does not automatically secure them. After you have specified all necessary components and views on the Security Views page, run the Security Views Update process to implement the settings.

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## Security Views

**Component**

Component Name: ANTICIPATED\_AID  Exclude Add Searchrecord

**Component Security Setup** Find | View All First 1 of 1 Last

**Global Security**  Menu Name:  Bar Name:

**Security Level**

\*Security: No Security

**Security Views**

No Security View: STDNT\_ANT\_SRCH1

Institution Security View: STUAN1\_INS\_SCTY

Campus Security View: SFA\_SN1\_CMP\_STY

Career Security View: STUAN1\_CAR\_SCTY

Program Security View: STUAN1\_PRG\_SCTY

Plan Security View: STUAN1\_PLN\_SCTY

### Security Views page

When a user attempts to access one of the components that you specify, the system checks the user's security for the institution, campus, career, program, or plan to verify that the user has permission to access the student data using the component. In some cases, the navigation is also verified.

**Note.** Adding components to the Security Views page does not automatically secure them. After you have specified all necessary components and views on the Security Views page, run the Security Views Update process to implement the settings.

## Component

**Exclude Add Searchrecord** Select to run the Security Views Update process without updating the Add Searchrecord settings.

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**Note.** If the check box is cleared, you may inadvertently overwrite predefined Add Searchrecord views. Before running the Security Views Update process with the check box cleared, review the Add Searchrecord settings by running a query or by reviewing the Add Searchrecord settings in PeopleSoft Application Designer on the component Properties page.

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All delivered security view settings initially have this check box cleared, with the exception of ENRL\_REQUEST components. To change this setting, do so before running the Security Views Update process.

## Component Security Setup

**Global Security** Select to secure the component name everywhere that the component is used, regardless of the menu name or bar name.

*Do not* select this check box if you want to have different security views set up for the component, depending on the navigation path. For example, if you access the component through the portal by selecting Records and Registration, 3C's Summaries, you may want to clear the Global Security check box and enter the underlying menu structure for this component . Then, insert a second row that specifies unique security level and security view data for the component name if you access it by selecting Campus Community through the portal.

**Menu Name** If you do not select the Global Security check box, this field is available for entry. Enter the particular menu name for which you want to apply this security view. Use this field to isolate a component name that is accessible using multiple navigation paths (for example, INSTR\_ADVSR\_PERS) when you want component security to vary depending on the navigation.

**Bar Name** If you do not select the Global Security check box, the Bar Name field is available for entry. Enter the bar name that coincides with the selected menu name for which you want to apply this security view. Use this field to isolate a component name that is accessed by multiple navigation paths when you want component security to vary depending on the navigation.

## Security Level

### Security

Use this field to select the security that you want to apply at this level for the component name. The level specified here determines which user IDs can access the component. For example, if you select *Program Level Security*, in the Security field, a user who attempts to access the specified component must have security set up on the Academic Program Security page for the same academic program as the student data that is accessed. In addition, if the user has access to careers and plans but has no user ID security set up for access to programs (and, in particular, the program of the accessed student data), then the user is denied access.

Security level options are:

*No Security*: Impose no security on the component name specified. Never delete a delivered component security view entry, even if the institution does not need it. Instead of deleting the security view entry for a particular component, set the Security field to *No Security*.

*Institution Level Security*: Secure the component name at the institution level. This requires that a user attempting to access student data must have access to the student's institution. This user ID access is set up on the Academic Institution Security page.

*Campus Level Security*: Secure the component name at the campus level. This requires that a user attempting to access student data must have access to the student's campus. This user ID access is set up on the Institution/Campus Security page.

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**Note.** Campus level security is available for all components; however campus level security views are delivered for only the Financial Aid and Enrollment Services delivered components.

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*Career Level Security*: Secure the component name at the career level. This requires that a user attempting to access student data must have access to the student's career. This user ID access is set up on the Institution/Career Security page.

*Program Level Security*: Secure the component name at the program level. This requires that a user attempting to access student data must have access to the student's program. This user ID access is set up on the Academic Program Security page.

*Plan Level Security*: Secure the component name at the plan level. This requires that a user attempting to access student data must have access to the student's plan. This user ID access is set up on the Academic Plan Security page.

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**Note.** Security Values are delivered with the PeopleSoft system as translate values. These translate values should not be modified in any way. Modification to these values requires significant programming effort.

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## Security Views

All of the security view settings delivered with the PeopleSoft system are provided as initial settings that you can alter to fit specific business needs *before* running the Security Views Update process.

The fields for delivered component name security views are populated with the appropriate security view (search record) based on the institution, campus, career, program, plan or no security setting in the Security field. Use of a particular view is determined by the selected security value. You can select any security value, based on your needs, and the corresponding security view is used. All of the security views fields prompt against all security records in the database, including records that you have modified.

You must enter a security view value for the corresponding level specified in the Security field. For example, if you specify *Program Level Security* in the Security field, then you must enter a value in the Program Security View field.

### No Security View

If *No Security* has been entered in the Security field, then you must enter a value in this field. The view that you enter is used to filter (not necessarily secure) the student data that is accessible through the component.

For security views provided by PeopleSoft, this field is set to match each specific component. For example, the ACADEMIC\_DEGREE component is delivered with a No Security View field setting of *PEOPLE\_SRCH*. This is because the delivered search record for ACADEMIC\_DEGREE is set to *PEOPLE\_SRCH*. You can modify this value.

### Institution Security View

If *Institution Level Security* has been entered in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT\_INS\_SCRTY*. This value references the user ID security that is set up on the Institution Security page. You can modify this value.

### Campus Security View

If *Campus Level Security* has been entered in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

This value references the user ID security that is set up on the Institution/Campus Security page. You can modify this value.

---

**Note.** Campus level security is available for all components; however campus level security views are delivered for only the Financial Aid and Enrollment Services delivered components.

---

### Career Security View

If *Career Level Security* has been entered in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT\_CAR\_SCRTY*. This value references the user ID security that is set up on the Institution/Career Security page. You can modify this value.



**Program Security View**

If *Program Level Security* has been entered in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT\_PRG\_SCRTY*. This value references the user ID security that is set up on the Academic Program Security page. You can modify this value.

**Plan Security View**

If *Plan Level Security* has been entered in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT\_PLN\_SCRTY*. This value references the user ID security that is set up on the Academic Plan Security page. You can modify this value.

---

**Note.** Components based on search records other than PEOPLE\_SRCH are delivered with settings different from those described here for Institution Security View, Campus Security View, Career Security View, Program Security View, and Plan Security View.

---

**SQL Statements to Find Component Occurrences**

You can use these Structured Query Language (SQL) select statements to find out the global and specific occurrences of a particular component:

- To identify components that have multiple menu paths, use this SQL Select statement:

```
SELECT PNLGRPNAME, MENUNAME, BARNAME, ITEMLABEL FROM PSMENUITEM
WHERE PNLGRPNAME = 'COMM_SUMMARY_PERS'
```

- To determine if a search record exists at the menu level, you can use either the PeopleSoft Application Designer Menu Item Properties page, or this SQL Select statement:

```
SELECT PNLGRPNAME, SEARCHRECNAME FROM PSMENUITEM
WHERE PNLGRPNAME = 'ACAD_PLAN'
```

If a search record exists, the search record at the component level has no effect here. Consequently, the page is secured at the menu level using this search record.

- To identify the search record at the component level, you can use either the PeopleSoft Application Designer Component Properties page, or this SQL Select statement:

```
SELECT PNLGRPNAME, SEARCHRECNAME FROM PSPNLGRPDEFN
WHERE PNLGRPNAME = 'ACAD_PLAN'
```

If a search record does not exist at the menu level, the search record at the component level is used to access and secure the page.

## Running the Security Views Update Process and Report

Access the Security Views Update page (Set Up SACR, Security, Secure Student Administration, Process, Security Views Update, Security Views Update).

After you assign new security views to Financial Aid or Campus Community components, you must re-run the Security Views Update process to accommodate the new views.

---

**Important!** The first time all users log on to the system after you run the Security Views Update process, all PeopleTools data pertaining to pages is recached. Consequently, you should run this process at the same time that you run other major maintenance processes, rather than immediately before a heavy traffic period for the institution. Recaching pages slows initial page access for users. In addition, if you erroneously delete or modify security, it is better to discover the error during a system lull than during a peak admission, billing, or registration period.

---

### Report Only

Select to create the SA Security Views Update (student administration security views update) report (SRSECVWU) without updating security view access for components at the institution.

If this check box is cleared, the process updates security view access *and* creates the Security Views report.

### Run

Click to run the Security Views Update process (SRSECVWU) as needed. When you run this process, the system updates PS Lock (PeopleSoft lock) record.

The Security Views Update process allows you to move from menu-specific security view settings to global settings without the risk of creating inaccurate search record data. Specifically, the process:

- Removes the menu component search record override.
- Enables the system to use the component search record that was updated by the SQR.

---

**Important!** *Do not* run the update process until you are satisfied with all of the security views data, including the security views data delivered by PeopleSoft. Before you run the process, review all of the security views data settings thoroughly—paying close attention to the Exclude Add Searchrecord and Global Security options.

---

## Specifying Search Parameters for Security View Changes

Access the Search Criteria page (Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Search Criteria).

Search Criteria page

<b>Component</b>	Enter the component object name to be audited for security. This field is required.
<b>User ID</b>	Enter the user ID that you want to audit. Leave this field blank to have the system retrieve all values for this field.
<b>Start Date</b>	Enter the earliest date to be audited. Leave this field blank to have the system retrieve all values for this field.
<b>End Date</b>	Enter the latest date to be audited. Leave this field blank to have the system retrieve all values for this field.
<b>View Changes Only</b>	<p>Clear this check box to have the system return all records with the action <i>Insert</i>, <i>Before</i>, <i>After</i>, or <i>Delete</i>.</p> <p>Select this check box to prevent the system from returning records with the action <i>Before</i>.</p> <p>This option controls before-and-after results. If you want to see only the values after the change, then select this check box. If you want to see the both the before and after values, then clear this check box.</p>
<b>Search</b>	After you enter the selection criteria, click this button to return audit data to the Security Table page and the Security Detail page. To modify the data that the system returns, update the selection criteria and click this button again.

---

**Note.** When you click this button, the retrieval process begins and the system displays the first page with data (either the Security Table page or the Security Detail page). If no changes were made to the table, the system displays the Security Detail page.

---

## Reviewing Security Table Audit Information

Access the Security Table page (Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Security Table).

Search Criteria		Security Table	Security Detail
<b>Component:</b> ACADEMIC_DEGREE	<b>Start Date:</b>	<b>Changes Only</b> <input type="checkbox"/>	
<b>User ID:</b>	<b>End Date:</b>		
User ID	Date/Time	Action	Component
			Excl Add Srchrc N

Security Table page

- User ID** Displays the user ID of the person who made changes to the Security View table. For rows where the action is *Delete*, no user ID appears because the system does not track the user ID of the person who deletes a record. When deletions occur, the character string *\*\*\*\*\** appears in the User ID field.
- Date/Time** Displays the date and time when the changes to the Security View table were made.
- Action** Values are:
  - *Insert*: Indicates that the user inserted a new row in the database.
  - *Delete*: Indicates that the user deleted a row from the database.
  - *Before*: Indicates an image of the record before it was updated.
  - *After*: Indicates an image of the record after it was updated.
- Component** Displays the component that you selected as part of the search criteria.
- Excl Add Srchrc** (exclude add search record) Displays the status of the Exclude Add Searchrecord option on the Security Views page. The values *Y* for selected and *N* for cleared indicate the status of the check box.

## Reviewing Security Detail Audit Information

Access the Security Detail page (Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Security Detail).

Search Criteria		Security Table		Security Detail	
Component:	ACADEMIC_DEGREE	Start Date:		Changes Only	<input type="checkbox"/>
User ID:		End Date:			
Component		Security			
User ID	Date/Time	Action	Component	Menu Name	Bar Name

Security Detail page: Component tab

---

**Important!** To record the security changes that the Security View Audit functionality audits, the IT team must first install and execute delivered SQL trigger files.

---

The installation guides on My Oracle Support provide more information about this topic.

---

**Note.** Column order may vary by implementation. All columns may not be visible. Use the horizontal scroll bar on the page to view all available columns.

---

### **Component Tab**

**User ID** Displays the user ID of the person who made changes to the Security View table. For rows where the action is *Delete*, no user ID appears because the system does not track the user ID of the person who deletes a record. When deletions occur, the character string *\*\*\*\*\** appears in the User ID field.

**Date/Time** Displays the date and time when changes to the Security View table were made.

**Action** Values are:

- *Insert*: Indicates that the user inserted a new row in the database.
- *Delete*: Indicates that the user deleted a row out of the database.
- *Before*: Indicates an image of the record before it was updated.
- *After*: Indicates an image of the record after it was updated.

**Component** Displays the component that you entered as part of the search criteria.

**Menu Name** Displays the menu name entered on the Security Views page.

**Bar Name** Displays the bar name entered on the Security Views page.

### **Security Tab**

Access the Security tab.

Search Criteria		Security Table		Security Detail			
Component: ACADEMIC_DEGREE		Start Date:		Changes Only <input type="checkbox"/>			
User ID:		End Date:					
Component		Security					
User ID	Date/Time	Action	Gbl Scrtly	Security	No Security	Inst Security	Career Security
			N				

Security Detail page: Security tab

**Gbl Scrtly** (global security) Displays the status of the Global Security check box on the Security Views page. The values *Y* for selected and *N* for cleared indicate the status of the check box.

**Security** Displays the option entered in the Security field on the Security Views page. Options are:

- *NON* (no access): *No Access* was entered on the Security Views page.
- *INS* (institution): *Institution Level* was entered on the Security Views page.
- *CMP* (campus): *Campus Level* was entered on the Security Views page.
- *CAR* (career): *Career Level* was entered on the Security Views page.
- *PRG* (program): *Program Level* was entered on the Security Views page.
- *PLN* (plan): *Plan Level* was entered on the Security Views page.

**No Security** Displays the view entered for the component in the No Security View field on the Security Views page.

**Inst Security** (institutional security) Displays the view entered for the component in the Institution Security View field on the Security Views page.

**Campus Security** Displays the view entered for the component in the Campus Security View field on the Security Views page.

**Career Security** Displays the view entered for the component in the Career Security View field on the Security Views page.

**Program Security View** Displays the view entered for the component in the Program Security View field on the Security Views page.

**Plan Security** Displays the view entered for the component in the Plan Security View field on the Security Views page.

## Setting Advisement Report Security

When the administrator uses the Request Advisement Reports page, the Generate Report Requests page, the Print batch Reports page or the Purge Report Results page, the type of advisement reports that can be accessed is specified on this page.

Access the Advisement Report Security page (Set Up SACR, Security, Secure Student Administration, User ID, Advisement Report Security, Advisement Report Security).

*Report Type			
ALL		+	-

All Access

Advisement Report Security

Enter a report type for which the combination of user ID and academic institution has access.

---

## Securing Academic Structure

To set up academic structure security, use these components: Academic Institution Security (SCRITY\_TABL\_INST), Institution/Campus (SCC\_STY\_TBL\_CAMPUS), Institution/Career Security (SCRITY\_TBL\_CAREER), Academic Program Security (SCRITY\_TABL\_PROG), and Academic Plan Security (SCRITY\_TBL\_PLAN).

Securing the academic structure involves setting up security for academic institutions, academic institution and academic career combinations, academic institution and campus combinations, academic programs, and academic plans. It is important to set up security for academic institutions individually and jointly with campuses and academic careers because not all pages are keyed by both academic institution and campus/academic career, and not all campuses and careers are available for every institution.

This section provides an overview of academic structure security and discusses how to:

- Set security for academic institutions.
- Set security for institution and campus combinations.
- Set security for institution and career combinations.
- Set security for academic programs.
- Set security for academic plans.

**See Also**

[Chapter 6, "Designing Your Academic Structure," page 89](#)

[Chapter 10, "Defining Programs, Plans, and Subplans," page 197](#)

*PeopleTools PeopleBook: Security Administration, "User Profiles"*

**Understanding Academic Structure Security**

You secure the academic structure by user ID. Give each user ID access to the academic institutions, campuses, academic careers, academic programs, and academic plans that the user needs to work with in the system.

You complete these steps to assign academic structure security to a user:

1. Define high-level institution security on the Academic Institution Security page.
2. Define campus security by institution on the Institution/Campus Security page.
3. Define career security by institution on the Institution/Career Security page.
4. Define academic program security on the Academic Program Security page.
5. Define academic plan security on the Academic Plan Security page.

**Pages Used to Secure Academic Structure**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Academic Institution Security	SCRTY_TABL_INST	Set Up SACR, Security, Secure Student Administration, User ID, Academic Institution Security, Academic Institution Security	Set security to determine the academic institutions that a user can access.
Institution/Campus Security	SCC_STY_TBL_CAMPUS	Set Up SACR, Security, Secure Student Administration, User ID, Institution/Campus Security, Institution/Campus Security	Set security for institution and campus combinations to determine the combinations that a user can access.
Institution/Career Security	SCRTY_TBL_CAREER	Set Up SACR, Security, Secure Student Administration, User ID, Institution/Career Security, Institution/Career Security	Set security for institution and career combinations to determine the combinations that a user can access.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Academic Program Security	SCRTY_TABL_PROG	Set Up SACR, Security, Secure Student Administration, User ID, Academic Program Security, Academic Program Security	Set security to determine the academic programs that a user can access for the selected institution and career combination.
Academic Plan Security	SCRTY_TBL_PLAN	Set Up SACR, Security, Secure Student Administration, User ID, Academic Plan Security, Academic Plan Security	Set security to determine the academic plan that a user can access for the selected academic institution.

## Setting Security for Academic Institutions

Access the Academic Institution Security page (Set Up SACR, Security, Secure Student Administration, User ID, Academic Institution Security, Academic Institution Security).

**Academic Institution** Enter an academic institution to grant the user ID access. You must list all academic institutions that the user ID can access.

## Setting Security for Institution and Campus Combinations

Access the Institution/Campus Security page (Set Up SACR, Security, Secure Student Administration, User ID, Institution/Campus Security, Institution/Campus Security).

<b>Institution/Campus Security</b>			
<b>User ID:</b>	PS	Locherty,Betty	
<b>Academic Institution:</b>	PSCCS	PS Community College System	
*Campus		Access Code	
MAIN	Main Campus	Read/Write	+ -
NAVY	Navy Campus	Read/Write	+ -

Institution/Campus Security page

**Campus** Enter a campus to assign to the user ID for the selected academic institution. List all the campuses that the user ID can access for the selected academic institution.

If a user ID is associated with more than one academic institution, enter campus information separately for each institution.

**Note.** This setup is used only in the Security Views Update process. No other functionality (security) is associated with this setup.

## Setting Security for Institution and Career Combinations

Access the Institution/Career Security page (Set Up SACR, Security, Secure Student Administration, User ID, Institution/Career Security, Institution/Career Security).

**Academic Career** Enter an academic career to assign to the user ID for the selected academic institution. List all of the academic careers that the user ID can access for the selected academic institution.

If a user ID is associated with more than one academic institution, enter career information separately for each institution.

## Setting Security for Academic Programs

Access the Academic Program Security page (Set Up SACR, Security, Secure Student Administration, User ID, Academic Program Security, Academic Program Security).

The screenshot shows the 'Academic Program Security' interface. At the top, it displays the following information:

- User ID:** PS, Locherty, Betty
- Academic Institution:** GLAKE, Great Lakes University
- Academic Career:** CNED, Continuing Education

Below this information is a section for configuring access:

- \*Academic Program:** A search box containing 'ALL' with a magnifying glass icon.
- \*Access Code:** A dropdown menu currently set to 'Read/Write'.
- All Access:** A yellow button with a '+' and '-' icon next to it.

Academic Program Security page

**Academic Program** For the selected academic institution and academic career combination, enter the specific academic programs that the user ID can access.

If a user ID is associated with more than one institution and career combination, enter program information separately for each combination.

## Setting Security for Academic Plans

Access the Academic Plan Security page (Set Up SACR, Security, Secure Student Administration, User ID, Academic Plan Security, Academic Plan Security).

Academic Plan Security			
<b>User ID:</b>	PS	Locherty,Betty	
<b>Academic Institution:</b>	GLAKE	Great Lakes University	
<hr/>			
<b>*Academic Plan</b>		<b>*Access Code</b>	
ALL <input type="text"/>	<input type="text"/>	Read/Write <input type="text"/>	All Access <input type="text"/>
			<input type="button" value="+"/> <input type="button" value="-"/>

Academic Plan Security page

### Academic Plan

For the selected academic institution, enter the specific academic plans that the user ID can access.

If a user ID is associated with more than one academic institution, enter academic plan information separately for each user ID and academic institution combination.

## Securing Academic Organizations

To set up academic organization security, use the Update Security - Acad Orgs component (RUN\_SA505) and the Academic Org Security component (SCRTY\_TABL\_ACAD).

This section provides overviews of academic organization security trees, security versus organizational structures, and creation of new security trees and discusses how to:

- Update the security tree.
- Granting and restricting access in the security tree.

## Understanding Academic Organization Security Trees

Online security is a critical issue in any organization. Because most data in Campus Solutions is confidential, you must specifically designate the data that users can see. To do that, you use an academic organization security tree, which is a security structure that graphically represents the hierarchies of organizational units in an institution. With the security tree, you can view and update the reporting relationships among units and grant and deny user access to data. You can also track changes over time by creating new trees with different effective dates. To set up data security, you create security trees that are based on hierarchies of organizational entities. Using PeopleSoft Tree Manager, you can build a new security tree showing organizational entities such as universities, institutions, and academic departments.

The primary advantage of using a hierarchy for academic organization security is that you do not have to define access rules for every organizational entity. Consequently, updating security access is faster than it would be if you had to update user access for each entity. And with a hierarchy, you can more easily deny access to a particular entity.

Each academic organization that you add to the academic organization security tree has a unique identifier—the academic organization code—which you create on the Academic Organization Table page.

After you create the academic organization security tree, you run the Update Security-Acad Orgs process that links the effective date of the tree structure with the Academic Organization Security table, in which you grant user access to academic organizations. This ensures that the security rules use the tree with up-to-date academic organization hierarchies. You then run the Tree Auditor process to crosscheck the Academic Organization table and the security tree to ensure that the academic organization data matches.

Use the Academic Organization Security table to grant or restrict user access to academic organizations. When you grant users access to an academic organization, you automatically grant them access to data in any academic organization that reports—directly or indirectly—to that academic organization, unless you selectively restrict access to a specific organization.

When you use the security structure that is delivered with Campus Solutions, you grant and deny user access to academic organization data using the same user IDs and roles that the system administrator creates.

### **See Also**

[Chapter 6, "Designing Your Academic Structure," page 89](#)

*PeopleTools PeopleBook: PeopleSoft Tree Manager*

*PeopleTools PeopleBook: Security Administration, "User Profiles"*

## **Understanding Security Versus Organizational Structures**

Though you use the organizational structure as the foundation for the data security structure, the two structures are not—and should not be—the same. The primary difference between the organizational structure and the data security structure is that you continue to maintain inactive academic organizations in the security structure. You must do this so that users can retrieve historical data associated with the inactive academic organizations.

Unlike an organization chart, a security tree has these characteristics:

- One security tree can be in effect at a time.  
Historical security is irrelevant to user access.
- Inactive academic organizations always appear in security trees.  
Otherwise, data in defunct academic organizations would be inaccessible.

To use trees for reporting purposes to accurately reflect an academic organization chart at a particular point in time, do not use the academic organization security tree. Instead, create a separate academic organization tree. As the organization changes, you can create new effective-dated versions of the academic organization tree. Then, you can easily create queries that extract data from hierarchies, which accurately reflect the academic organization structure at a fixed point in time.

In the steps described for creating an academic organization security tree, it is assumed that you have a hierarchy using academic organizations from the Academic Organization table to grant and deny access to user IDs. This is the structure delivered with Campus Solutions, and it works well if you use the academic organization structure as the basis for the security structure—that is, users should view only specific portions of data, in certain organizational chunks, and the organizational entities are hierarchical.

---

**Note.** Base the security structure on *current* security needs. For example, you might have only a few users using Campus Solutions for the first six months of implementation. Consequently, you would not need to set up complex security hierarchies at that point. With a simple security hierarchy, you achieve enhanced system performance. When security needs change—for example, when more users begin using the system—you can easily adapt the security structure.

---

## Understanding the Security Tree Creation Process

PeopleSoft Tree Manager offers a powerful visual means to build a security hierarchy for all organizational entities. A tree hierarchy is a quick, graphical method of granting and restricting user access to data in Campus Solutions. You do not have to perform regular audits to prevent circular or conflicting relationships among units, as you do with code-based security. The security hierarchy prevents such relationships from occurring in the first place.

You retain the logical groupings of the hierarchy, such as institutions and academic departments, by representing them as *levels* in the academic organization security tree. The groupings represent a security hierarchy, but they do not have to match the organizational chart.

You use levels and academic organizations to create a hierarchy of security access. For example, users who can access information for *UNIV* (university) can access information for all academic organizations in the institution. On the other hand, users who are granted access to information in *ENGR* (engineering) can access information for only the School of Engineering.

From within PeopleSoft Tree Manager, you can view and update existing academic organization data, and you can create new academic organizations. Double-click an academic organization to open the Academic Organization Table page, which contains data for that particular academic organization.

You organize a tree by adding or moving limbs. Whenever you must change the security hierarchy for academic organizations, make a new effective-dated copy of the tree and move limbs to other locations. This practice makes the maintenance of organizational security easier and more accurate. When you add an academic organization to the tree, PeopleSoft Tree Manager links to the Academic Organization table, where you review specific information on the academic organization.

### **Creating a New Tree**

You complete these steps to create a new security tree:

1. Define the tree structure.  
  
Identify the page definitions, record definitions, and fields for the underlying database tables where tree data is stored.
2. Define the tree for ACAD\_ORGANIZATION on the Tree Definition page.
3. (Optional) Specify organizational levels.
4. Define security for academic organizations on the Academic Org Security page.

**See Also**

Chapter 6, "Designing Your Academic Structure," Defining Academic Organizations, page 130

*PeopleTools PeopleBook: PeopleSoft Tree Manager*

**Pages Used to Secure Academic Organizations**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Update Security – Acad Orgs (update security – academic organizations)	RUNCTL_ASOFDATA	Set Up SACR, Security, Secure Student Administration, Process, Update Security – Acad Orgs, Update Security – Acad Orgs	Link the academic organization security tree to academic organization security so that the system recognizes the current effective-dated academic organization security tree.
Academic Org Security (academic organization security)	SCRTY_TABL_ACAD	Set Up SACR, Security, Secure Student Administration, User ID, Academic Org Security, Academic Org Security	Grant and restrict access to data for a user ID.

**Updating Security Trees**

Access the Update Security – Acad Orgs page (Set Up SACR, Security, Secure Student Administration, Process, Update Security – Acad Orgs, Update Security – Acad Orgs).

**As Of Date**

Enter the date that the new academic organization security tree becomes active. The Update Security - Acad Org process searches for the academic organization security tree that has an effective date closest to, but not greater than, this date and makes that the active security tree.

**Run**

Run the Update Security - Acad Org (update security - academic organization) process (SR505) as needed.

Run this process the first time that you create an academic organization security tree, any time that you create an academic organization security tree with a different effective date, and any time that you make a change to the current academic organization security tree.

---

**Important!** Because only one academic organization security tree can be in effect at any particular point in time, be sure to run this process only on the date that the new tree takes effect—not before. For example, if the new security tree has an effective date of January 1, 2005, you should run this process on January 1, 2005. The system uses whatever tree has an effective date closest to, but not greater than, the date you enter in the As Of Date field.

---

## Granting and Restricting Access in Security Trees

Access the Academic Org Security page (Set Up SACR, Security, Secure Student Administration, User ID, Academic Org Security, Academic Org Security).

Academic Org Security			
<b>User ID:</b>	PSAPPS		<b>Name:</b>
*Acad Org		*Access Code	
ART	Art	Read/Write	+ -
ARTHISTORY	Art & Art History	No Access	+ -
DANCE	Dance	Read/Write	+ -

Academic Org Security page

Enter the highest academic organization in the hierarchy that the user ID should be able to access. Insert rows to add academic organizations or to restrict access to a particular academic organization lower in the hierarchy.

Academic organization security is based on the hierarchy in the academic organization security tree. The academic organization that you identify here must be a node on the academic organization security tree. Granting access to one node of the academic organization tree also provides access to all child nodes for that organization. To restrict access to a child node, select the academic organization that you want to secure and set the access code to *No Access*.

### Example 1

This security setup grants the user ID access to all academic organizations under the Biology and the Chemistry nodes in the security tree:

Academic Org Security			
<b>User ID:</b>	ESGBPI		<b>Name:</b>
*Acad Org		*Access Code	
CHEMISTRY	Chemistry	Read/Write	+ -
BIOLOGY	Biology	Read/Write	+ -

Permission for specific academic organizations (SRTCY\_TABL\_ACAD)

### Example 2

This security setup grants this user ID access to all academic organizations under the PeopleSoft University node *except* any that fall under the School of Medicine or Law School node:

*Acad Org	*Access Code		
<input type="text" value="PSUNV"/> PeopleSoft University	Read/Write	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="MEDICINE"/> School of Medicine	No Access	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="LAW"/> Law School	No Access	<input type="button" value="+"/>	<input type="button" value="-"/>

Permission with restrictions for academic organizations (SCRITY\_TABL\_ACAD)

The School of Medicine and Law School are excluded because the access code is set to *No Access*.



## Chapter 14

# Securing Campus Community

This chapter discusses how to:

- Set up communication, checklist, and comment (3C) group security.
- Set up service indicator security.
- Replace user security.
- Apply demographic data access security.
- Secure and set up the Population Update process.

---

## Setting Up 3C Group Security

To set up 3C group security, use the 3C Group Security component (OPR\_GRP\_3C\_TABLE).

You can select which 3C groups user IDs can view and update. The Campus Community 3C engine also uses the security that you set up here. The 3C engine does not process the user's request if the user does not have update access for the 3C value used in the process. 3C groups allow access to specific communication categories, checklist codes, and comment categories.

This section lists a prerequisite and discusses how to grant 3C group security.

### Prerequisite

Before you set up 3C group security, set up 3C groups and complete the security setup for your institution.

#### **See Also**

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Understanding the 3Cs — Communications, Checklists, and Comments"

[Chapter 13, "Securing Your Academic Institution," page 243](#)

## Page Used to Set Up 3C Group Security

Page Name	Definition Name	Navigation	Usage
3C Group Security	OPR_GRP_3C_TABLE	Set Up SACR, Security, Secure Student Administration, User ID, 3C Group Security, 3C Group Security	Grant user access to 3C group information.

## Granting 3C Group Security

Access the 3C Group Security page (Set Up SACR, Security, Secure Student Administration, User ID, 3C Group Security, 3C Group Security).

**3C Group Security**

User ID: ESGBPI      Name: Locherty,Betty

*Institution		*3C Update/Inquiry Group	Inquiry Indicator	Update Indicator		
PSUNV	PSU	AMB	Alumni Membership	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
PSUNV	PSU	AEV	Alumni Event	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ -
PSUNV	PSU	ASS	Alumni Student Staff	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+ -

3C Group Security page

### Security Settings

- Institution**      Enter an institution. Only institutions to which this user ID has access are available.
  
- 3C Update/Inquiry Group**      Enter the 3C group that the user ID should have access to for the selected institution. The 3C groups are defined on the Group 3C Table page (GRP\_3C\_TABLE page).
  
- Inquiry Indicator**      Select to enable the user ID to *view* all data in the 3C group. The inquiry indicator is used to widen or narrow searches on 3C inquiry pages throughout the system. For example, a user that has inquiry access to a certain 3C group will only be able to view the communications, checklists, or comments assigned to an individual or to an organization that is tied to the 3C group.

**Update Indicator**

Select to enable the user ID to update, by entering or altering, data in the 3C group. You should also select this check box if you want the user ID to be able to process 3C items by using the 3C engine. If the user ID does not have update access to the 3C group, the 3C engine does not process a request by using the 3C group. This functionality is similar to the way the system manages manual assignments for communications, checklists, or comments.

---

## Setting Up Service Indicator Security

To set up service indicator security, use the Service Indicator Security component (SCRTY\_TABL\_SRVC) and the Service Indicator Display (SCC\_SI\_DISP\_ROLE) component..

This section lists a prerequisite and discusses how to:

- Grant placement and release access to service indicators.
- Restrict display of service indicators.

### Prerequisite

Before you set up service indicator security, set up service indicators in the Service Indicator table.

#### See Also

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Service Indicators"

### Pages Used to Set Up Service Indicator Security

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Service Indicator Security	SCRTY_TABL_SRVC	Set Up SACR, Security, Secure Student Administration, User ID, Service Indicator Security, Service Indicator Security	Grant placement and release access to service indicators for a user ID for a particular institution.
Service Indicator Display	SCC_SI_DISP_ROLE	Set Up SACR, Security, Secure Student Administration, Setup, Service Indicator Display, Service Indicator Display	Restrict view access to service indicators on administrative pages to specific roles.

## Granting Placement and Release Access to Service Indicators

Access the Service Indicator Security page (Set Up SACR, Security, Secure Student Administration, User ID, Service Indicator Security, Service Indicator Security).

**Service Indicator Security**

**User ID:** PS      **Name:** Locherty,Betty  
**Academic Institution:** PSUNV      PeopleSoft University

*Service Indicator Code		Reason	Placement	Release		
ALL	All Services Hold	ALL	All Services Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
ANO	Anonymous			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
B01	No Bill Created	NOBIL	No Bill	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
BIL	Billing Indicator	IMP	Important Person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
CMP	Campaign 2000	DONOR	Major Donor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
CMP	Campaign 2000	PROSP	Major Prospect	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
DEP	Enrollment Deposit	NODEP	No Enrollment Deposit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
DNM	Do Not Mail	SRPTD	Self Reported	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
DNM	Do Not Mail	STAFF	Staff Reported	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
DNP	Do Not Publish	SRPTD	Self Reported	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -

Service Indicator Security page

### Security Settings

**Service Indicator Code**

Enter a code for each service indicator that the user ID should be able to place or release. To restrict the use of a service indicator by reason, enter multiple rows for the service indicator and enter the different reasons that apply. You define service indicator codes inside the Service Indicator Table.

**Reason**

Enter a reason indicating when the user ID can access the service indicator. You must enter a reason for each indicator.

For example, if the user ID should be able to use the conference guest service indicator only for football recruitment visits or Special Olympics guests, select each of those reasons for the conference guest service indicator. Define the reasons for using a service inside the Service Indicator table.

**Placement and Release**

Select if this user ID should have permission to assign or release the service indicator.

## Restricting Display of Service Indicators

Access the Service Indicator Display page (Set Up SACR, Security, Secure Student Administration, Setup, Service Indicator Display, Service Indicator Display).

### Service Indicator Display

**Academic Institution:** PSUNV      PeopleSoft University

**Service Indicator Code:** L01      Library Fines

**Service Ind Reason:** LF001      Overdue Library Fines

**Restrict Display to Roles** Customize | Find | First ◀ 1 of 1 ▶ Last

	*Role Name	Description	
1	CS - Administrator <input style="width: 80%;" type="text" value="CS - Administrator"/>	CS - Administrator	+ -

Service Indicator Display page

### ***Restrict Display to Roles***

To restrict the display of a service indicator's data to specific roles, enter the one or more roles for whom the data should appear. The system displays the data only for the roles that you specify, and does not display it for any role not listed.

If you do not want to restrict the display, ensure that no role is listed. When no role is listed on the Service Indicator Display page, the service indicator data is unrestricted and the system displays it for all roles.

Service indicator data includes the service indicator icon on pages for IDs to which the indicator is assigned, and the service indicator information on the Service Indicator Summary page and the General Info tab of the Student Services Center component.

---

**Note.** A user's placement or release security takes precedence over restricted display. If the display of a service indicator is restricted, but the user has place or release access for that service indicator, then the service indicator data will appear for that user whether or not the user has any of the restricted display roles.

---

## Replacing User Security

To copy or assign Campus Solutions user security, use the User Security Replacement component (SCRITY\_OPRID\_REPLAC) or the Mass User Security Replacement component (SCC\_MASS\_SCRITY\_UPD).

Copying a security setup is the same as going to each appropriate menu and entering data for each security object to assign security for a specific user. Replacement security automates the process for you by enabling you to copy a security profile either to another individual user or to several users in mass.

This section discusses how to:

- Replace user security for an individual.
- Replace user security for multiple individuals.

---

**Note.** User security replacement described here applies only to Campus Solutions user security. It does not apply to PeopleTools security.

---

## Pages Used to Replace User Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
User Security Replacement	SCRTY_OPRID_REPLAC	Set Up SACR, Security, Secure Student Administration, Setup, User Security Replacement, User Security Replacement	Copy the security setup of one user to another user.
Mass User Security Replacement	SCC_MASS_SCRTY_UPD	Set Up SACR, Security, Secure Student Administration, Process, Mass User Security Replacement, Mass User Security Replacement	Assign or copy a security profile to an individual user or to a group of users.

## Replacing User Security for an Individual

Access the User Security Replacement page (Set Up SACR, Security, Secure Student Administration, Setup, User Security Replacement, User Security Replacement).

## User Security Replacement

**User ID:** PS Nichta,Issac

**Replacement User**


**Default Replacement User:**  

---

**User Preferences:**  


**Institution:**  

**Institution/Campus:**  

**Institution/Career:**  

**Academic Program:**  

**Academic Plan:**  

**Academic Organization:**  

**Admissions Action:**  

**Program Action:**  

**Application Center:**  

**Recruiting Center:**  


**3C Group Security:**  

**Service Indicator:**  

**Student Group:**  

**Transcript Type Security:**  

**Transcript Report Type:**  

**Test ID:**  

**Pop Update:**  

**Advisement Report Type:**  

User Security Replacement page

### ***Replacement User***

#### **Default Replacement User**

To replace or create all of a user ID's security objects with the same security objects assigned to another user ID, specify the user ID whose security objects you want to copy in this field. When you exit the field, the system automatically copies each security object from the replacement user ID.

If you do not want to replace each of this user's security objects with all the security objects of one user ID, indicate the replacement user ID for each object that you want to replace. You do not have to replace all objects. For those objects that you do not want to replace, leave the field blank.

**User Preferences**

When you enter a user ID in this field, the default values that you set up in the User Default component for the entered user ID are assigned to the user ID, including the enrollment override defaults which assigns the Enrollment Access ID.

User defaults are set up in the User Defaults component.

See [Chapter 21, "Setting User Defaults," page 387](#).

**3C Group Security**

When you enter a user ID in this field, the system also sets the values on the User 3C Group Summary page of the User Defaults component.

When you enter a user ID in any of the other fields on this page, the user ID is assigned the same security that you set up for the selected user ID for that item. All of these fields refer to the security that you set up on the pages in Set Up SACR, Security, Secure Student Administration, User ID.

**Replacing User Security for Multiple Individuals**

Access the Mass User Security Replacement page (Set Up SACR, Security, Secure Student Administration, Process, Mass User Security Replacement, Mass User Security Replacement).



## Mass User Security Replacement

Run Control ID: POP\_SEL [Report Manager](#) [Process Monitor](#) Run

---

**Population Selection**

**Selection Tool:**

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

---

**Replacement User**

**Default Replacement User:**

---

<b>User Preferences</b>	<input type="text"/>	
<b>Institution:</b>	<input type="text"/>	
<b>Institution/Campus</b>	<input type="text"/>	
<b>Institution/Career</b>	<input type="text"/>	
<b>Academic Program</b>	<input type="text"/>	
<b>Academic Plan</b>	<input type="text"/>	
<b>Academic Organization</b>	<input type="text"/>	
<b>Admissions Action</b>	<input type="text"/>	
<b>Program Action</b>	<input type="text"/>	
<b>Application Center</b>	<input type="text"/>	
<b>Recruiting Center</b>	<input type="text"/>	
<b>3C Group Security</b>	<input type="text"/>	
<b>Service Indicator:</b>	<input type="text"/>	
<b>Student Group</b>	<input type="text"/>	
<b>Transcript Type Security</b>	<input type="text"/>	
<b>Transcript Report Type</b>	<input type="text"/>	
<b>Test ID</b>	<input type="text"/>	
<b>Pop Update</b>	<input type="text"/>	
<b>Advisement Report Type</b>	<input type="text"/>	

Mass User Security Replacement page

### ***Population Selection***

Enter the tool and related parameters for selecting the population of user IDs to which you want to assign this user security or replace the existing security.

Fields in the Population Selection group box on this page function the same as they do in the Population Selection group box across the system.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

### **Replacement User**

Enter the user ID whose security you want to mass assign to the user IDs selected by Population Selection. You can modify any of the user security values to assign.

Fields in the Replacement User group box function the same as described for the same group box on the User Security Replacement page.

---

## **Applying Demographic Data Access Security**

To set up demographic data access (DDA) security, use the Demographic Data Access component (PERS\_MSK\_CFG) and the Demographic Data Access process component (RUNCTL\_MSK\_CFG).

This section provides overviews of DDA security and setting up DDA security, and discusses how to:

- Define DDA masking configurations.
- Run the DDA process.

### **Understanding DDA Security**

With DDA security, you can mask the display of national ID and birth date data in search records, prompt records, and on the Bio/Demo Data and the Relationships pages if these pages have display-only security. You can mask entire fields, the first five characters of the national ID field, or the year of the birth date field. You can apply masking to one, both, or neither field. No matter which masking configuration you use, users can search on the entire national ID field.

---

**Note.** To enhance the flexibility of masking for the National ID and birth date in Search/Match functionality, see Search/Match display options. National ID and birth date data are not masked in queries and reports.

---

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Search/Match."

To apply DDA security, you define masking configurations for all primary permission lists and assign a primary permission list to each user ID as part of his or her User Profile.

For example, suppose a primary permission list assigned to a user ID is named ALLPANLS. You might not want national IDs to appear throughout the system for this permission list, but you do want partial birth dates to appear. You would access the Demographic Data Access setup page and insert a row for the ALLPANLS permission list. In that row, you would configure the system to both mask the entire national ID and display a partial birth date field (masking the year).

You must then run the Demographic Data Access (MSK\_CFG) process to replace data in the masking configuration table with the masking configuration that you defined. The new configuration will be applied to each user to whom that permission list is assigned.

In the example, after running the Demographic Data Access process, each user whose primary permission list is ALLPANLS will not see national IDs on search pages or prompts, but they will see the birth month and day where birth dates appear. The masking configuration for the primary permission list to which a user is assigned also controls how national ID and birth date data appear on the Bio/Demo Data page (SCC\_BIO\_DEMO\_PERS) and the Relationships page (RELATIONSHIPS) throughout the system.

---

**Note.** The national ID and the birth date fields appear masked on the Biographical Details page and the Relationships page only for users who have security set to show the pages in display-only mode. If a user has more than one permission list and, therefore, has both add/update and display-only access to a masked page, then the least restrictive setting (add/update) takes precedence, and masking is not applied.

---

## Setting Up DDA Security

To set up DDA security, you must assign a primary permission list to each user ID, grant administrative access to components for managing DDA, and define masking configurations for each primary permission list.

---

**Note.** All Campus Solutions search records and prompts depend on DDA security. Therefore, you must assign a primary permission list to each user, even those who do not need the national ID and the birth date fields masked. In the latter case, set the masking configurations in the primary permission list for both the National ID and the Date of Birth to *Display entire field*.

---

## Pages Used to Apply DDA Security

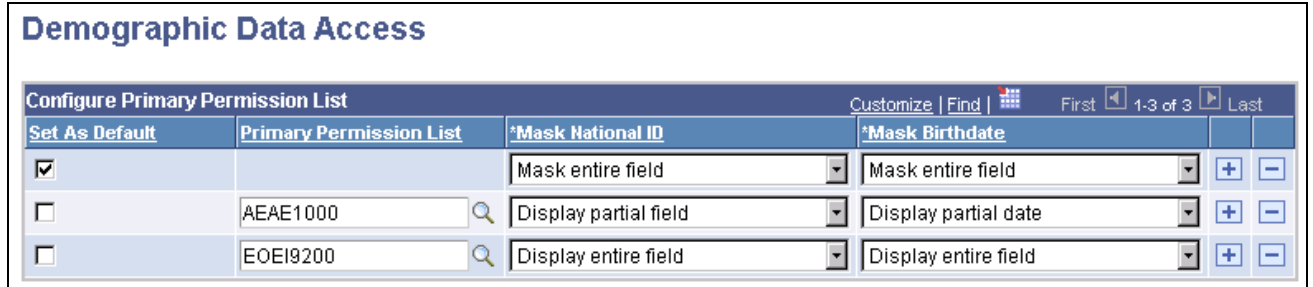
<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
General	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles, General	Assign a primary permission list to a user ID.
Pages	ACL_MENU2	PeopleTools, Security, Permissions & Roles, Permission Lists, Pages	Grant access to new components for managing DDA masking configurations for each primary permission list.  Grant access to new Student components for users that should prompt only against Students.
Demographic Data Access (setup)	PERS_MSK_CFG	Set Up SACR, Security, Secure Student Administration, Permission List, Demographic Data Access, Demographic Data Access	Define masking configurations for primary permission lists.
Demographic Data Access (run control)	RUNCNTL_MSK_CFG	Set Up SACR, Security, Secure Student Administration, Process, Demographic Data Access, Demographic Data Access	Initialize the primary permission list configuration for all primary permission lists assigned to users.

**See Also**

*PeopleTools PeopleBook: Security Administration, "Setting Up User Profiles" and "Working with Permission Lists"*

## Defining DDA Masking Configurations

Access the Demographic Data Access (setup) page (Set Up SACR, Security, Secure Student Administration, Permission List, Demographic Data Access, Demographic Data Access).



Demographic Data Access (setup) page

---

**Important!** Each time you make changes to the Demographic Data Access page, you must run the DDA process to apply the changes.

---

### Configure Primary Permission List

**Set As Default**

Select to assign this masking configuration to all permission lists used as primary permission lists.

When selected, the Primary Permission List field becomes unavailable.

**Primary Permission List**

Insert a row for each primary permission list that requires a masking configuration different than the default masking configuration.

When you run the process, the system applies this masking configuration to all users to whom this primary permission list is assigned.

**Mask National ID**

Enter the configuration to use for national IDs. Values are *Display entire field*, *Display partial field*, and *Mask entire field*.

If you display a partial field, the system masks the first five characters of the national ID field.

These translate values should not be modified.

**Mask Birthdate**

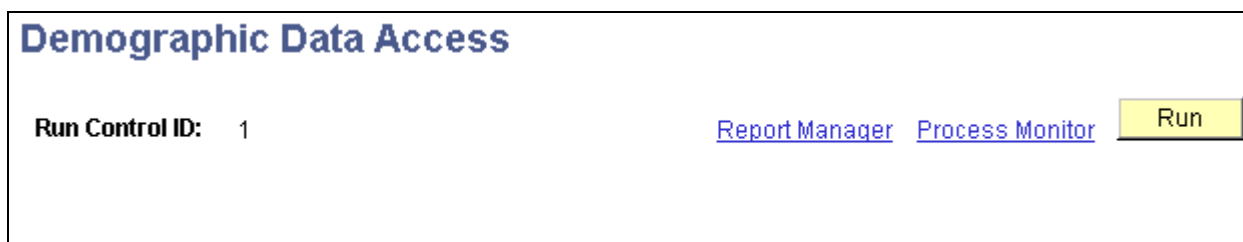
Enter the configuration to use for birth dates. Values are *Display entire field*, *Display partial date*, and *Mask entire field*.

If you display a partial date, the system masks the year and displays month and day in the default date format for each birth date field.

These translate values should not be modified.

## Running the DDA Process

Access the Demographic Data Access (run control) page (Set Up SACR, Security, Secure Student Administration, Process, Demographic Data Access, Demographic Data Access).



Demographic Data Access (run control) page

You must run the DDA process (MSK\_CFG) to apply changes made on the Demographic Data Access (setup) page and to apply the default masking configuration to any newly created, newly assigned primary permission list whose masking configuration is not otherwise defined.

---

**Note.** The process applies the masking configuration only for permission lists that are used as "primary" permission lists. Therefore, if you assign a User ID a primary permission list that was not used as the primary the last time the DDA process was run, you will need to run the process again.

---

## Securing and Setting Up the Population Update Process

To secure and set up the Population Update process, use the Population Update Security (SCC\_POP\_UPD\_SRTY) component and the Population Update Setup (SCC\_POP\_UPD\_SETUP) component

This section discusses how to:

- Assign Population Update user security.
- Set up the Population Update process.

### See Also

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process," Understanding the Population Update Process

## Pages Used to Secure and Set Up the Population Update Process

Page Name	Definition Name	Navigation	Usage
Population Update Security	SCC_POP_UPD_SRTY	Set Up SACR, Security, Secure Student Administration, User ID, Population Update Security, Population Update Security	Set user security for accessing records to update using the Population Selection update process.
Population Update Setup	SCC_POP_UPD_SETUP	Set Up SACR, System Administration, Utilities, Population Update, Population Update Setup, Population Update Setup	Identify records and fields to make available for updating.

### Assigning Population Update User Security

Access the Population Update Security page (Set Up SACR, Security, Secure Student Administration, User ID, Population Update Security, Population Update Security).

### Population Update Security

**User ID:** EOPP\_USER

Record (Table) Name	Description	Access Code		
STDNT_AID_ATRBT	Ⓜ Packaging Status Summary	Read/Write	+	-
PERS_INST_REL	Ⓜ Person Relationships with Institution	Read/Write	+	-
STDNT_PKG_VAR	Ⓜ Student Packaging Variables	Read/Write	+	-

Population Update Security page

**Record (Table) Name**

Enter each record that you want the user to be able to update for populations selected by the Population Selection process.

After you save the page, the user can view and update the records if your institution or department makes them available for updating on the Population Update Setup page.

### Setting Up the Population Update Process

Access the Population Update Setup page (Set Up SACR, System Administration, Utilities, Population Update, Population Update Setup, Population Update Setup).

## Population Update Setup

**Fields Available for Update**

**Record (Table) Name** STDNT\_AID\_ATRBT Packaging Status Summary

[Customize](#) | [Find](#) | First ◀ 1-3 of 3 ▶ Last

*Field Name	Field Long Name		
LN_INTERVW_STATUS ▼	Loan Entrance Interview Status	+	-
SFA_REVIEW_STATUS ▼	Review Status	+	-
SSN_MATCH_OVRD ▼	SSN Match Override	+	-

Population Update Setup page

When you select a record and access the Population Update Setup page, the system makes the fields from that record available in the Field Name drop-down lists. Select each field that you want to make available for users to update. Only the records and fields that you select and to which the user has security access will be available on the run control page.





## Chapter 15

# Securing Recruiting and Admissions

This chapter provides an overview of PeopleSoft Recruiting and Admissions security and discusses how to:

- Set security for recruiting centers.
- Set security for application centers.
- Set security for admissions actions.
- Set security for test IDs.

---

## Understanding Recruiting and Admissions Security

This section lists common elements and discusses recruiting and admissions security.

### Common Elements Used in This Chapter

<b>Access Code</b>	This value is set to <i>Read/Write</i> , which gives the user both read and write access.
<b>All Access</b>	Click to assign access to all recruiting centers, application centers, admissions program actions, or test IDs for the selected user ID and institution combination.

### Recruiting and Admissions Security

You secure prospect data through the recruiting center, and you secure applicant data through the application center. Access to prospect data or applicant data is given to a user ID by granting access to specified recruiting centers or application centers. If the user ID is not associated with a particular recruiting center, the user ID cannot access prospect data associated with that recruiting center. The same is true for accessing applicant data for a particular application center. You also give access to user IDs for specific program actions, which are associated with recruiting and admissions. In addition, you grant users access to test IDs to control the users who can work with external test data.

---

## Setting Security for Recruiting Centers

To set up recruiting center security, use the Recruiting Center Security component (SCRTY\_RECR\_CENTER).

This section lists prerequisites and discusses how to assign recruiting center access.

### Prerequisites

Before you set security for recruiting centers:

- Set up academic institutions and recruiting centers.
- Set up institution security.
- Set up institution and career security.

### Page Used to Set Security for Recruiting Centers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Recruiting Center Security	SCRTY_RECR_CENTER	Set Up SACR, Security, Secure Student Administration, User ID, Recruiting Center Security, Recruiting Center Security	Assign recruiting center access to a specified user ID for an institution.

### Assigning Recruiting Center Access

Access the Recruiting Center Security page (Set Up SACR, Security, Secure Student Administration, User ID, Recruiting Center Security, Recruiting Center Security).

### Recruiting Center Security

**User ID:** PS                      Locherty, Betty

**Institution:** PSUNV                      PeopleSoft University

*Recruiting Center	Career	Access Code	Find	First	1-2 of 2	Last
GRAD <input type="text"/> <input type="button" value="🔍"/> Graduate - Central	GRAD	Read/Write	All Access	+	-	
MEDS <input type="text"/> <input type="button" value="🔍"/> Medical School	MEDS	Read/Write		+	-	

Recruiting Center Security page

Enter a recruiting center that the combination of user ID and institution can access. The career associated with the recruiting center appears if you added it when you set up the recruiting center.

---

## Setting Security for Application Centers

To set up application center security, use the Application Center Security component (SCRTY\_APPL\_CENTER).

This section lists prerequisites and discusses how to assign application center access.

### Prerequisites

Before you set security for application centers:

- Set up academic institutions and application centers.
- Set up institution security.

### Page Used to Set Security for Application Centers

Page Name	Definition Name	Navigation	Usage
Application Center Security	SCRTY_APPL_CENTER	Set Up SACR, Security, Secure Student Administration, User ID, Application Center Security, Application Center Security	Assign application center access to a specified user ID for an institution.

## Assigning Application Center Access

Access the Application Center Security page (Set Up SACR, Security, Secure Student Administration, User ID, Application Center Security, Application Center Security).

### Application Center Security

**User ID:** PS                      Locherty,Betty

**Institution:** PSUNV                      PeopleSoft University

*Application Center	Career	Access Code	Find	First	1-2 of 2	Last
<input type="text" value="UGRD"/> Undergraduate	UGRD	Read/Write	<input type="button" value="All Access"/> <input type="button" value="+"/> <input type="button" value="-"/>			
<input type="text" value="GRAD"/> Graduate Admissions	GRAD	Read/Write	<input type="button" value="+"/> <input type="button" value="-"/>			

Application Center Security page

Enter an application center that the combination of user ID and institution can access. The career associated with the application center appears if you added it when you set up the application center.

## Setting Security for Admissions Actions

To set up admissions actions security, use the Admissions Action Security component (SRTY\_ADM\_ACTION).

This section lists a prerequisite and discusses how to assign program action security.

### Prerequisite

Before you set security for admissions actions, set up program actions.



## Understanding Test ID Security

User ID based security for test IDs now ensures users access and process only the test data for which they have permission. Because the menus for the Load Processes and the Suspense pages have been consolidated, users must enter a test ID to access the correct pages. This security will also determine what test scores the user will see in Test Results and Academic Test Summary.

Select the test IDs for which a user has Read/Write security on the Test ID Security page. The system enforces test ID security on the following components:

- Test Results component.
- Academic Test Summary component.
- External Test Score Load component.
- External Test Score Suspense component.
- Search/Match/Post Test Scores component.
- Test Score Candidate Data component
- External Test Score Purge component.

For example, to review suspense data, users navigate to the External Test Score Suspense component. To review posted test data, users navigate to the Test Score Candidate Data component. Users enter the test ID that they want to review (and for which they have test ID security), and the appropriate pages appear.

## Prerequisites

Before you can assign test ID security, you must define test IDs on the Test Tables page.

## Page Used to Assign Security for Test IDs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test ID Security	SAD_TEST_SCTY	Set Up SACR, Security, Secure Student Administration, User ID, Test ID Security, Test ID Security	Assign the test IDs that a user can access. The system enforces test ID security in several components throughout the system.

## Assigning Test ID Security

Access the Test ID Security page (Set Up SACR, Security, Secure Student Administration, User ID, Test ID Security, Test ID Security).

### Test ID Security

User ID: CM

Find First 1-3 of 3 Last

*Test ID	*Access Code	+ -
ACT ACT Assessment	No Access	All Access
SAT I Scholastic Assessment Test I	Read/Write	
SAT II Scholastic Assessment Test II	Read/Write	

Test ID Security page

**Test ID**

Enter a test ID to grant or limit access to it. You define test IDs on the Test Tables page.





## Chapter 16

# Securing Student Records

This chapter provides an overview of PeopleSoft Student Records security and discusses how to:

- Set up enrollment access IDs.
- Set up enrollment access groups.
- Set up enrollment security for user IDs.
- Set up enrollment security for self-service enrollment.
- Set security for program actions.
- Set security for transcript types.
- Set security for graduation review.

---

## Understanding Student Records Security

Student Records security setup includes access to enrollment, program actions, and transcript types. You enable security for program actions and transcript types by specifying which program actions and transcript types a user ID is allowed to access.

Enrollment security is more complicated and includes setting up enrollment access IDs and enrollment access groups. An enrollment access ID determines the time period when a user can perform certain enrollment functions and the type of overrides to which a user has access. An enrollment access group determines which types of students a user can enroll. It also controls the courses in which a user can enroll a student. You can add enrollment access IDs to enrollment access groups to limit the time period when the user can perform enrollment functions for the types of students.

Enrollment access IDs or enrollment access groups are assigned to user IDs for administrative users. For student self-service users, you assign enrollment access IDs to permission lists, which are assigned to students.

## Prerequisites

Before you set up enrollment access IDs, you must complete the following tasks for each term within an academic career:

- Set up the time periods and associate them with sessions.

Several time periods are delivered with the PeopleSoft system, and you can add other time periods if needed.

- Set up valid time periods for every academic career on the Time Period Table page.
- Attach time periods to sessions and specify the dates for each time period for the sessions within a term on the Session Time Periods page.

**See Also**

Chapter 7, "Establishing Terms and Sessions," Defining Session Time Periods, page 161

---

## Setting Up Enrollment Access IDs

To set up enrollment access IDs, use the Enrollment Security Table component (SAD\_TEST\_SCTY).

Enrollment access IDs determine when users can perform certain enrollment functions during a specified time period. For example, you can allow advisors to enroll students in classes only during the first two weeks of classes. Enrollment access IDs can also include overrides to allow the user to override certain enrollment rules—for example, to override a class size limit. You assign enrollment access IDs to user IDs for administrative users and to permission lists for student self-service users.

Set up enrollment access IDs for the different groups of people who work with student enrollment. Create groups based on the different type of access that the people in these groups should have for each enrollment function. Groups might include advisors, clerks in the registrar's office, and registrar staff. Each group should have different types of access. You must also create enrollment access IDs to be used specifically for self-service enrollment.

This section discusses how to:

- Define access for enrollment functions.
- Define enrollment overrides.

**See Also**

Chapter 16, "Securing Student Records," Setting Up Enrollment Security for Self-Service Enrollment, page 311

## Pages Used to Set Up Enrollment Access IDs

Page Name	Definition Name	Navigation	Usage
Enrollment Functions	ENRMT_OVRD_TBL	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Functions	Define access for enrollment functions by creating enrollment access IDs and assigning time periods to various enrollment functions. The time periods define when the enrollment access IDs can access each function. You attach these enrollment access IDs to user IDs, permission lists, and enrollment access groups.
Enrollment Overrides	ENRMT_OVRD_TBL2	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Overrides	Define the enrollment overrides that the enrollment access ID can use.

## Defining Access for Enrollment Functions

Access the Enrollment Functions page (Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Functions).

Enrollment Functions
Enrollment Overrides

**Enrollment Access ID:**

**\*Description:**

**\*Short Desc:**

**Enroll:**  End 1st Wk

**Enroll W/ Permission:**  End 3rd Wk

**Drop:**  End Drp/Ad

**Drop W/ Permission:**  End Drp/Ad

**Grade Basis Change:**  End Drp/Ad

**Unit Change:**  End Drp/Ad

Delete Enrollment Access ID

**Wait List Changes:**  End 1st Wk

**Grade Add:**  No Access

**Grade Change:**  No Access

**Repeat Coding:**  No Access

**Rqmnt Designtn Opt Change:**  End Drp/Ad

**Instructor Choice Change:**  End Drp/Ad

Enrollment Functions page

For each enrollment access ID that you create, you grant access to enrollment functions by attaching a time period code to each enrollment function. Time period codes determine when the enrollment access ID has access to the specific enrollment action. Use time period code *999* to grant unrestricted access, and use time period code *000* to give no access.

<b>Enroll</b>	Enter a time period code for enrolling a student.
<b>Enroll W/Permission</b> (enroll with permission)	Enter a time period code for enrolling a student in a class after the regular enrollment period is over. A student needs permission to enroll in this period.
<hr/>	
<b>Important!</b> If you set the Enroll W/Permission field to time period <i>999</i> (unrestricted time access), the system always grants access to a user connected to this enrollment access ID when that user attempts to enroll with or without permission, regardless of the time period associated with the Enroll field.	
<hr/>	
<b>Drop</b>	Enter a time period code for dropping a student.
<b>Drop W/Permission</b> (drop with permission)	Enter a time period code for dropping a student from a class after the regular drop period is over. A student needs permission to drop a class during this period.
<b>Grade Basis Change</b>	Enter a time period code for changing a student's grading basis for a class.
<b>Unit Change</b>	Enter a time period code for changing units.
<b>Wait List Changes</b>	Enter a time period code for changing to a student's waiting list position.
<b>Grade Add</b>	Enter a time period code for adding a grade for a student.
<b>Grade Change</b>	Enter a timer period code for changing a grade for a student.
<b>Repeat Coding</b>	Enter a time period code for attaching a repeat code to a student for a class. The repeat code is found on the enrollment processing pages.
<b>Rqmnt Designtn Opt Change</b> (requirement designation option change)	Enter a time period code for changing requirement designations for a student's class.
<b>Instructor Choice Change</b>	Enter a time period code for changing instructors for a class, if this option is set up for the class.
<b>Delete Enrollment Access ID</b>	Click to delete this enrollment access ID. After you click the button, you can still cancel the deletion.

### ***Processing Steps***

When the enrollment engine verifies that a user can perform a certain enrollment function, it:

- Retrieves the user's enrollment access ID.

- Checks which enrollment function the user is trying to complete, such as enroll or drop.
- Applies the time period associated with the enrollment function on the Enrollment Functions page, using the user's enrollment access ID.

The enrollment engine also evaluates the overrides to which a user has access.

- Accesses the Session table and retrieves the end date for the time period.
- Compares the system date with the end date for the time period.

If the system date is less than or equal to the end date for the time period, the system grants access for the enrollment function.

### Example

Suppose that you want to enroll a student in a class scheduled in the regular academic session. The regular academic session time period 110 has an end date of August 29, 2005. If the action date for the enrollment is greater than August 29, 2005, the system denies access to the enrollment function. If you have defined an enroll-with-permission time period (for example, time period 120), the system requires permission for enrollment.

## Defining Enrollment Overrides

Access the Enrollment Overrides page (Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Overrides).

Enrollment Functions		Enrollment Overrides	
Enrollment Access ID:		SESS	
Is Allowed To Override			
General Overrides		Class Overrides	
<input type="checkbox"/>	Appointment	<input type="checkbox"/>	Closed Class
<input type="checkbox"/>	Unit Load	<input type="checkbox"/>	Class Links
<input type="checkbox"/>	Time Conflict	<input type="checkbox"/>	Class Units
<input type="checkbox"/>	Action Date	<input type="checkbox"/>	Grading Basis
<input type="checkbox"/>	Requirement Designation	<input type="checkbox"/>	Class Permission
<input type="checkbox"/>	Career	<input type="checkbox"/>	Dynamic Dates
<input type="checkbox"/>	Service Indicator	<input type="checkbox"/>	Wait List Okay
<input type="checkbox"/>	Requisites		

Enrollment Overrides page

Select the override options that the enrollment access ID is permitted to use. The overrides that you select here are used on the Enrollment Request page for users assigned the enrollment access ID.

***Is Allowed To Override***

<b>Appointment</b>	Select to allow override of appointment date and time to modify the appointment maximum enrollment units.
<b>Unit Load</b>	Select to allow override of any unit limits, minimum or maximum. These include unit load for appointment, term and session unit load, term and session course count load, term and session <i>No GPA</i> units, term and session <i>Audit</i> units, wait list units, and the minimum unit enrollment verification.
<b>Time Conflict</b>	Select to allow override of class section time conflict checking.
<b>Action Date</b>	Select to make the Action Date field available so you can enter a different processing date.
<b>Requirement Designation</b> (override requirement designation)	Select to allow adding a requirement designation for a class that does not have one. Also, select to allow omitting a requirement designation that is required.
<b>Career</b>	Select to allow override of academic career pointers and career pointer exception rules.
<b>Service Indicator</b>	Select to allow override of any holds that the student has so that enrollment is allowed.
<b>Requisites</b>	Select to allow override of requisite checking.
<b>Closed Class</b>	Select to allow enrollment in classes that are closed due to capacity size (full class section, combined section, or reserve capacity sizes). Also select to allow placing a student on the waiting list if waiting list capacity is full.
<b>Class Links</b>	Select to allow an add or drop without all the required related component sections in a class association group. Select also to allow enrollment into a nonenrollment type section and to allow multiple enrollments in a course.
<b>Class Units</b>	Select to allow override of course units for either fixed or variable units.
<b>Grading Basis</b>	Select to allow override of the grading basis established for the class.
<b>Class Permission</b>	Select to allow override of class consent—for general permission or student-specific permission—to enroll in a class.
<b>Dynamic Dates</b>	The system populates this field by default with a value of 'N'. A DMS script sets the value to 'Y' for those access IDs that allow access to all existing overrides. Review your security setup and set this value accordingly.
<b>Wait List Okay</b>	Select to allow the addition of a student to the waiting list of a class section when the class section, combined section, or reserve capacity is full.

## Setting Up Enrollment Access Groups

To set up enrollment access groups, use the Enrollment Group Access component (ENRL\_GROUP\_ACCESS).

This section provides an overview of enrollment access groups and discusses how to:

- Define students for enrollment group access.
- Define access to courses and assign enrollment access IDs.

## Understanding Enrollment Access Groups

You use enrollment access groups to allow or restrict enrollment access to groups of students; for example, undergraduate athletes or students in the law career. You can define student groups using any combination of academic institutions, academic careers, academic programs, academic plans, and student groups. You can further restrict enrollment for the student group by assigning enrollment access IDs to limit the time periods when certain enrollment functions are allowed. In addition, you can restrict the enrollment for the student group to courses from a certain academic organization, to specific course catalog numbers, or to specific sessions.

You can also set up enrollment access groups that deny access to a particular group of students or that deny enrollment to particular courses—for example, courses of a particular academic organization, courses with particular catalog numbers, or courses in particular sessions. If you set up an enrollment access group that denies access to groups of students, that enrollment access group cannot be used to provide access to a different group of students. Similarly, if you deny access to particular types of courses for groups of students, you cannot add other rules that allow access to those types of courses.

## Prerequisites

Before you can set up enrollment access groups, you must:

- Set up the academic institutions, academic careers, academic programs, academic plans, and student groups.
- Set up enrollment access IDs, academic organizations, course catalog, and session information.

## Pages Used to Set Up Enrollment Access Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Group Access	ENRL_GROUP_ACCESS	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Group Access, Enrollment Group Access	Define students for enrollment group access.

Page Name	Definition Name	Navigation	Usage
Enrollment Group Access Course	ENRL_GROUP_ACCESS2	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Group Access, Enrollment Group Access Course	Define access to courses for the student group created on the Enrollment Group Access page. You can also assign an enrollment access ID to the student group.

## Defining Students for Enrollment Group Access

Access the Enrollment Group Access page (Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Group Access, Enrollment Group Access).

**Enrollment Group Access** | EnrollmentGroup Access Course

**Enrollment Access Group:** 0001

**\*Description:** Liberal Arts Advisors Delete Enrollment Access Group

Find   View All		First	1 of 1	Last
<b>*Enroll Security Student Seq No:</b>	1			
<b>*Academic Institution:</b>	PSUNV	PeopleSoft University		
<b>Academic Career:</b>				
<b>Academic Program:</b>	LAU	Liberal Arts Undergraduate		
<b>Academic Plan:</b>				
<b>Student Group:</b>				
<b>Only Primary Program</b>	<input checked="" type="checkbox"/>	<b>Deny Access</b>	<input type="checkbox"/>	

Enrollment Group Access page

- Description** Enter the description for the enrollment access group. You can only enter a description in this field for a new value. After the page is saved, you cannot change the description.
- Delete Enrollment Access Group** Click to delete this enrollment access group. After you click the button, you can still cancel the deletion.
- Enroll Security Student Seq No** (enrollment security student sequence number) Displays a counter for each group of students that you define. When you insert additional rows to define parameters for additional student groups, the number increments by one. This field appears on the Enrollment Group Access Course page so that you can define the course information for each group.
- Academic Institution** Enter the academic institution that this enrollment access group can access.



<b>Academic Career</b>	Enter the academic career within the selected academic institution that this enrollment access group can access. If you select an academic career, you cannot select an academic program or academic plan.
<b>Academic Program</b>	Enter the academic program within the selected academic institution that this enrollment access group can access. If you select an academic program, you cannot select an academic career or academic plan.
<b>Academic Plan</b>	Enter the academic plan within the selected academic institution that this enrollment access group can access. If you select an academic plan, you cannot select an academic career or academic program.

---

**Note.** You can specify only an academic career, an academic program, *or* an academic plan. You cannot specify a combination of these.

---

<b>Student Group</b>	Enter the student group that this enrollment access group can access. You define student groups in Student Records.
<b>Only Primary Program</b>	Select to grant access only to students whose primary academic program matches the academic program selected. If you select this check box, the user cannot access students whose secondary academic program matches the academic program selected.  This check box is available only if you entered a value in the Academic Program field.
<b>Deny Access</b>	Select to deny access to the specified group of students. If you select Deny Access for one group of students (identified by the enrollment security student sequence number), you deny access for any subsequent groups of students that you define for the enrollment access group.

---

**Warning!** When this page is saved, the selected access for the enrollment access group becomes effective immediately.

---

## Defining Access to Courses and Assigning Enrollment Access IDs

Access the EnrollmentGroup Access Course page (Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Group Access, EnrollmentGroup Access Course).

The screenshot shows a web interface for 'Enrollment Group Access Course'. At the top, there are two tabs: 'Enrollment Group Access' and 'Enrollment Group Access Course'. Below the tabs, the 'Enrollment Access Group' is set to '0001' and the 'Description' is 'Liberal Arts Advisors'. There are two data tables. The first table has one row with 'Student Seq No' as '1'. The second table has one row with '\*Course Seq No' as '1'. Below the tables, there are several input fields: 'Enrollment Access ID' is 'FULL', 'Academic Organization' is empty, 'Catalog No From' and 'Catalog No To' are empty, 'Session From' and 'Session To' are empty. There is a 'Deny Access' checkbox which is unchecked. Navigation buttons like 'Find', 'View All', 'First', 'Last' are visible above the tables.

EnrollmentGroup Access Course page

**Student Seq No** (student sequence number)

Displays the enrollment security student sequence number. This is the same field used to count the student groups defined on the Enrollment Group Access page. For each student group, you can define different parameters.

**Course Seq No** (course sequence number)

This counts each set of parameters for course enrollment—enrollment access ID, academic organization, catalog numbers, and sessions—for each student sequence number.

For example, for a particular group of students, you might allow enrollment in two academic organizations. In this case, you would have two course sequence numbers, one to define each academic organization.

**Enrollment Access ID**

Enter an enrollment access ID if you want to attach a defined set of allowable enrollment functions and overrides to the enrollment access group. You define enrollment Access IDs on the Enrollment Functions page.

Enrollment Access ID is not a required field. If you do not enter an enrollment access ID on this page, all enrollment functions are allowed for all time periods during the session for the students and courses specified for the enrollment group access.

---

**Note.** You can select any combination of the Enrollment Access ID field, the Academic Organization field, the Catalog No From (catalog number from) field, the Catalog No To (catalog number to) field, the Session From field, and the Session To field. Each of these fields creates different parameters for limiting enrollment of the student group.

---

<b>Academic Organization</b>	Enter an academic organization in which you want to allow the student group to enroll. If you do not select any value, then the student group can be enrolled in classes in any academic organization, unless you specify a catalog number range.
<b>Catalog No From</b> (catalog number from) and <b>Catalog No To</b> (catalog number to)	<p>Enter the catalog number range in which you want to allow the student group to enroll. Entering a catalog number range allows students in the defined student group to enroll in courses within the range.</p> <p>If you want to include more than one range of catalog numbers, add another row to define the second catalog number range.</p>
<b>Session From</b> and <b>Session To</b>	Enter the session range in which you want to allow the student group to enroll. You can include more than one range of sessions by adding a row.
<b>Deny Access</b>	<p>Select to prevent enrollment in the selected parameters. For example, if you select the Deny Access check box, the range of the courses selected is the courses in which the student group <i>cannot</i> be enrolled. All other courses would be available.</p> <p>If you select the Deny Access check box for one course sequence number, select it for any subsequent course sequence numbers that you define for the student group. Each student group has its own student sequence number.</p> <hr/> <p><b>Note.</b> You do not need to select an enrollment access ID if you select the Deny Access check box because you are denying access for all time periods and functions.</p> <hr/>

---

**Warning!** When this page is saved, the selected access for the enrollment access group becomes effective immediately.

---

## Setting Up Enrollment Security for User IDs

To set up user ID enrollment security, use the Enrollment Security component (OPR\_SA\_ACCESS).

This section lists prerequisites and discusses how to define enrollment security for user IDs.

### Prerequisites

Before you can create enrollment security for user IDs, you must set up enrollment access IDs and enrollment access groups.

#### See Also

[Chapter 16, "Securing Student Records," Setting Up Enrollment Access IDs, page 300](#)

[Chapter 16, "Securing Student Records," Setting Up Enrollment Access Groups, page 305](#)

## Page Used to Create Enrollment Security for User IDs

Page Name	Definition Name	Navigation	Usage
Enrollment Security	OPR_SA_ACCESS	Set Up SACR, Security, Secure Student Administration, User ID, Enrollment Security, Enrollment Security	Define enrollment security for user IDs by assigning either an enrollment access group or an enrollment access ID to a specific user ID. Also, assign additional default enrollment overrides.

## Defining Enrollment Security for User IDs

Access the Enrollment Security page (Set Up SACR, Security, Secure Student Administration, User ID, Enrollment Security, Enrollment Security).

### Enrollment Security

**User ID:** ESGBPI **Name:** Locherty,Betty

**ID:** KU0007

---

**Enrollment Access Group:**  Student Enroll Group 1

**Enrollment Access ID:**

**Default Override**

- Override Class Limit**
- Override Unit Load**
- Override Class Permission**
- Override Requisites**
- Override Time Conflict**
- Wait List Okay**

Enrollment Security page

You can grant a user ID enrollment access by enrollment access group *or* by enrollment access ID, but not both.

**Enrollment Access Group** Enter an enrollment access group to grant the user ID access to enrollment for specific groups of students. The Default Override group box is not available if you enter an enrollment access group.

---

**Note.** When a user's enrollment security is controlled by an enrollment access group, override security is enforced when an enrollment request is processed by the enrollment engine.

---

**Enrollment Access ID** Enter an enrollment access ID to grant the user ID access to enrollment functions during specific time periods within the session. When you enter an enrollment access ID and exit the field, the system checks against the ENRMT\_OVRD\_TBL and makes available the overrides allowed for the selected enrollment access ID.

---

**Note.** When a user's enrollment security is controlled by enrollment access ID, only authorized overrides are available for use on the Enrollment Request page and the Quick Enroll page.

---

### ***Default Override***

If you are granting the user ID access by enrollment access ID, select the override options that you want to set as default overrides for the user ID. You can select only those default overrides that are allowed for the enrollment access ID. The override defaults are available on enrollment pages.

### ***See Also***

[Chapter 16, "Securing Student Records," Setting Up Enrollment Access IDs, page 300](#)

[Chapter 16, "Securing Student Records," Defining Enrollment Overrides, page 303](#)

---

## **Setting Up Enrollment Security for Self-Service Enrollment**

To set up self-service enrollment security, use the Self-Serv Enrollment Perm List component (SA\_SS\_ENRL\_PERM) and the Enrollment Security component (OPRCLASS\_SA\_ACCESS).

This section provides an overview of self-service enrollment security, lists prerequisites, and discusses how to:

- Define self-service enrollment permission lists.
- Assign enrollment access to permission lists.

## Understanding Self-Service Enrollment Security

When a student selects a term for enrollment, the system displays the View My Schedule page. At this point, PeopleCode enables the system to evaluate the roles attached to the student's user ID. The self-service enrollment permission list defined on the Self Service Enrollment Permission List Definition page must be attached to the student's roles. The search is conducted using the institution and term combination that the student selects on the term listing page.

For example, suppose that a student selects the Fall 2005 term at PSUNV. The system searches all of the roles attached to the user ID and determines whether the permission list named SASTDNT exists for PSUNV. If it does, the student is allowed to continue with the enrollment process. If the permission list is not found, the Add, Swap, and Update links are hidden and the system displays this message: "You are not authorized for self service enrollment at this time."

If a student passes the verification step, subsequent enrollment transactions are subject to enrollment engine security checks. When an enrollment request is submitted, the enrollment engine uses the enrollment access ID attached to the self-service permission list to evaluate time period security as usual.

To set up security for self-service enrollment:

1. Create a self-service permission list for student self-service enrollment on the Permission Lists page.  
Select PeopleTools, Maintain Security, Use, Permission Lists to access the Permission Lists page.
2. Create a role for student self-service in the Roles component.  
(Select PeopleTools, Maintain Security, Use, Roles to access the Roles component. Attach the permission list to this role.
3. Attach an enrollment access ID to the permission list using the Permission List - Enrollment Security page.
4. Specify the self-service enrollment permission list for the institution using the Self Service Enrollment Permission List page.

## Prerequisites

Before you can set up self-service enrollment security, you must:

- Create the role for student self-service on the Roles page.
- Set up a self-service enrollment permission list on the Permission List page.
- Set up enrollment access IDs on the User ID - Enrollment Security page.

## Pages Used to Set Up Enrollment Security for Self-Service Enrollment

Page Name	Definition Name	Navigation	Usage
Self Service Enrollment Permission List Definition	SA_SS_ENRL_PERM	Set Up SACR, Security, Secure Student Administration, Permission List, Self-Serv Enrollment Perm List, Self Service Enrollment Permission List Definition	Define self-service enrollment permission lists.
Permission List – Enrollment Security	OPRCLASS_DEF_SA	Set Up SACR, Security, Secure Student Administration, Permission List, Enrollment Security, Enrollment Security	Assign an enrollment access ID to a permission list. Permission lists are then assigned to students to give them access to self-service enrollment functions.

## Defining Self-Service Enrollment Permission Lists

Access the Self Service Enrollment Permission List Definition page (Set Up SACR, Security, Secure Student Administration, Permission List, Self-Serv Enrollment Perm List, Self Service Enrollment Permission List Definition).

### Self Service Enrollment Permission List Definition

**Academic Institution:**      PSUNV      PeopleSoft University

**\*Permission List:** Delete

Self Service Enrollment Permission List Definition page

### Permission List

Enter the self-service permission list that you created. The academic institution is associated with the permission list.

### Delete

Click to delete the academic institution and permission list combination defined on the page. In the preceding example, the PSUNV/SASTDNT row would be deleted from the table. A warning message appears when you click the Delete button.

## Assigning Enrollment Access to Permission Lists

Access the Permission List - Enrollment Security page (Set Up SACR, Security, Secure Student Administration, Permission List, Enrollment Security, Enrollment Security).

## Enrollment Security

**Primary Permission List:** EOBF9000

Find   View All		First	1 of 1	Last
<b>Academic Institution:</b>	<input type="text" value="PSUNV"/>	PeopleSoft University		
<b>Enrollment Access ID:</b>	<input type="text" value="SESS"/>	Student Enroll Self Service		

Permission List - Enrollment Security page

**Academic Institution** Enter an academic institution that a student can access for self-service enrollment using this permission list.

**Enrollment Access ID** Enter an enrollment access ID to allow students using this permission list to access the enrollment functions during the time periods specified in the enrollment access ID.

---

## Setting Security for Program Actions

To set up program action security, use the Program Action Security component (SCRTY\_PROG\_ACTION).

This section lists a prerequisite and discusses how to define program action security.

### Prerequisite

Before you can set up program action security, set up the program actions on the Program Action Table page.

#### See Also

[Chapter 16, "Securing Student Records," Setting Security for Program Actions, page 314](#)

*PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Setting Up Admissions Program Actions and Program Action Reasons," Setting Up Admissions Program Actions and Program Action Reasons



## Page Used to Set Security for Program Actions

Page Name	Definition Name	Navigation	Usage
Program Action Security	SCRTY_PROG_ACTION	Set Up SACR, Security, Secure Student Administration, User ID, Program Action Security, Program Action Security	Define program action security by assigning a user ID to specific program actions. If you do not give the user ID access to program actions on this page, the user ID cannot perform any program actions.

## Defining Program Action Security

Access the Program Action Security page (Set Up SACR, Security, Secure Student Administration, User ID, Program Action Security, Program Action Security).

### Program Action Security

**User ID:** 8201 Rifkin,Cheri

*Program Action	Access Code	
<input type="text" value="RLOA"/>	Return from Leave of Absence	Read/Write <span style="float: right;">+ -</span>
<input type="text" value="LEAV"/>	Leave of Absence	Read/Write <span style="float: right;">+ -</span>
<input type="text" value="ADRV"/>	Admission Revocation	Read/Write <span style="float: right;">+ -</span>

Program Action Security page

**Program Action** Enter a program action that the user ID can access. The access code is set to *Read/Write*.

**All Access** Click to assign access to all program actions for the user ID.

---

## Setting Security for Transcript Types

To set up transcript type security, use the Transcript Type Security component (SCRTY\_TSCRPT\_TYPE).

This section lists a prerequisite and discusses how to define transcript type security.

## Prerequisite

Before you can define transcript type security, set up transcript types in the Transcript Type component.

---

**Note.** Transcript type security does not affect access to transcript types in PeopleSoft Learner Services or PeopleSoft Learning Management self-service applications.

---

### See Also

*PeopleSoft Student Records 9.0 PeopleBook, "Setting Up Transcripts"*

*PeopleSoft Student Records 9.0 PeopleBook, "Producing Transcripts"*

## Page Used to Set Security for Transcript Types

Page Name	Definition Name	Navigation	Usage
Transcript Type Security	SCRTY_TSCRPT_TYPE	Set Up SACR, Security, Secure Student Administration, User ID, Transcript Type Security, Transcript Type Security	Set transcript type security for a user ID and a particular institution.

## Defining Transcript Type Security

Access the Transcript Type Security page (Set Up SACR, Security, Secure Student Administration, User ID, Transcript Type Security, Transcript Type Security).

### Transcript Type Security

**User ID:** PS      Locherty,Betty

**Academic Institution:** PSUNV      PeopleSoft University

*Transcript Type			
ADVIP	Advisement Transcript	+	-
PBK	Phi Beta Kappa	+	-
TRCRR	Transfer Credit Report	+	-

All Access

Transcript Type Security page

When a user attempts to process a transcript using the Request Transcript Report (SSR\_TSCRPT\_RQST) or Process Transcripts (SSR\_RUNCTL\_TSRPT) components, the user can select only those transcript types for which the user has security access.

**Transcript Type**

Enter a transcript type for which the combination of user ID and academic institution has processing access.

---

**Note.** You should not define a transcript type of *ALL* because the system uses this value to grant users access to all transcript types.

---

## Setting Security for Graduation Review

To set up graduation review security, use the Graduation Status Security (SSR\_SCRTY\_GRADSTAT) component.

This section discusses how to set graduation status security.

### Page Used to Set Security for Graduation Review

Page Name	Definition Name	Navigation	Usage
Graduation Status Security	SSR_SCRTY_GRADSTAT	Set Up SACR, Security, Secure Student Administration, User ID, Graduation Status Security	Identify, by institution, the Graduation Status the user has access to use during graduation tracking.

### Setting Graduation Status Security

Access the Graduation Status Security page.

**Graduation Status Security**

User ID: GRADREVIEW2 Nakamura,Haruki

Academic Institution: PSUNV PeopleSoft University

Graduation Review Status	Description
DPRV	Department Review

All Access

Graduation Status Security page

**Graduation Review Status**

Select the value or values that the UserID can use on the Graduation Tracking page.

**All Access**

Click this button to change the Graduation Review Status to *ALL* and grant the user access to every status available.



## Chapter 17

# Securing Student Financials

This chapter provides an overview of PeopleSoft Student Financials security and discusses how to:

- Set security views.
- Set security options.
- Update Student Financials security settings.
- Set security for setIDs.
- Set security for business units and cashier offices.
- Set security for item types.
- Set security for institution sets.
- Override the self-service institution set.
- Set security for companies.
- Set security for origin IDs.
- Set security for credit cards.

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## Understanding Student Financials Security

In Student Financials, you can set security for setIDs, business units, cashier offices, item types, institution sets, companies, origin IDs, and credit cards. For each of these items, you can select to have no security, user ID security, or permission list security. You can use any of the three types of security, and you do not need to use the same type of security throughout the application. For example, you could select no security for origin IDs, user ID security for business units, and permission list security for item types.

You use the Security Options page to enter data such as the type of security for setIDs, business units and item types. The type of security that you select for each item on the Security Options page determines which of the other pages in this section you must complete. You can secure each item by user ID or permission list.

If you select user ID security for an item on the Security Options page, complete the appropriate page by selecting Design Student Administration, Secure Student Financials, User ID.

If you select permission list security for an item on the Security Options page, complete the appropriate page by selecting Design Student Administration, Secure Student Financials, Perm List.

If you select no security for an item on the Security Options page, do not complete any other page for that item. All permission lists and user IDs can access all items when you select no security.

When you set security, you give either a user ID or a permission list access to the items that you list on the page. If you do not list the item on the page, the user ID or permission list does not have access to the item.

In the following sections, you can set security for each item using a user ID page or a permission list page. Complete only one of these pages, depending on the type of security that you select on the Security Options page for the item.

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**Note.** Student Financials security works in conjunction with any other security settings that you configure in the PeopleSoft system.

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**See Also**

*PeopleTools PeopleBook: Security Administration, "User Profiles" and "Working with Permission Lists"*

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## Setting Security Views

To set up security views, use the Security Views component (SECURITY\_VIEWS).

Before completing the security setup, you should review the delivered security views. You can also add modified security views to the system.

This section discusses how to review security views.

### Page Used to Set Security Views

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Views	SECURITY_VIEWS	Set Up SACR, Security, Secure Student Financials, Setup, Security Views, Security Views	Review the security views delivered with the PeopleSoft system. You can also add modified security views for the system.

### Reviewing Security Views

Access the Security Views page (Set Up SACR, Security, Secure Student Financials, Setup, Security Views, Security Views).

*Search Text	*No Security View	*User ID Security Views	*Secured Field Type
SP_ADDITM	SP_ADDITM_NONVW SP_ADDITM_CLSVW	SP_ADDITM_OPRVW	Item Type Security
SP_ADWITM	SP_ADWITM_NONVW SP_ADWITM_CLSVW	SP_ADWITM_OPRVW	Item Type Security
SP_BU_SF	SP_BU_SF_NONVW SP_BU_SF_CLSVW	SP_BU_SF_OPRVW	Business Unit Security
SP_CMPNY	SP_CMPNY_NONVW SP_CMPNY_CLSVW	SP_CMPNY_OPRVW	Company Security

Security Views page

<b>Search Text</b>	Common identifier that relates to the view.
<b>No Security View</b>	The view that runs when no security is set.
<b>Permission List Security View</b>	The view that runs when security is set to permission list.
<b>User ID Security Views</b>	The view that runs when security is set to user ID.
<b>Secured Field Type</b>	When a prompt is on the field, one of the views runs depending on how security is set.

### View Extensions

View names have one of three extensions:

- `_NONVW` indicates that the view has no security.
- `_OPRVW` indicates the view has user ID security.
- `_CLSVW` indicates the view has permission list security.

## Setting Security Options

To set up security options, use the Security Options component (SECURITY\_OPTIONS).

You can select no security, user ID security, or permission list security for the setID, business unit, credit card number, company, institution set, origin, and item type in Student Financials. After you make selections on the Security Options page, you use other pages to enter user IDs or permission lists to secure the selected items.

This section discusses how to select security options.

## Page Used to Set Security Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Options	SCRTY_OPTIONS_SF	Set Up SACR, Security, Secure Student Financials, Setup, Security Options, Security Options	<p>Select the security options that you plan to implement and the key fields that you want to secure in Student Financials.</p> <p><b>Note.</b> This page is not keyed by setID or business unit. The system implements the options that you select here throughout the system.</p>

## Selecting Security Options

Access the Security Options page (Set Up SACR, Security, Secure Student Financials, Setup, Security Options, Security Options).



Security Options	
<b>SetID</b> <input checked="" type="radio"/> No Security <input type="radio"/> User ID Security <input type="radio"/> Permission List Security	<b>Business Unit</b> <input checked="" type="radio"/> No Security <input type="radio"/> User ID Security <input type="radio"/> Permission List Security
<b>Credit Card / Check</b> <input checked="" type="radio"/> No Security <input type="radio"/> User ID Security <input type="radio"/> Permission List Security	<b>Company</b> <input checked="" type="radio"/> No Security <input type="radio"/> User ID Security <input type="radio"/> Permission List Security
<b>Institution Set</b> <input checked="" type="radio"/> No Security <input type="radio"/> User ID Security <input type="radio"/> Permission List Security	<b>Origin</b> <input checked="" type="radio"/> No Security <input type="radio"/> User ID Security <input type="radio"/> Permission List Security
<b>Item Type</b> <input checked="" type="radio"/> No Security <input type="radio"/> User ID Security <input type="radio"/> Permission List Security <input type="checkbox"/> Charge Reversals <input type="checkbox"/> Payment Reversals <input type="checkbox"/> Writeoff Reversals	

Security Options page

### ***SetID, Business Unit, Credit Card/Check, Company, Institution Set, and Origin***

For each area, select a security option:

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**Note.** If you select No Security for Credit Card / Check, all users can view the entire credit card number. If you select User ID Security or Permission List Security, only users who are granted access can view the whole credit card number.

---

#### **No Security**

Select to disable PeopleSoft application security. All users authorized to access a page can select any valid setID, business unit, credit card, company, institution set, origin, or item type. PeopleSoft applications are delivered with security disabled.

When you select this option, the system does not use any of the security setup that is described in these sections. Even if you enter information on the pages in these sections, the security is *not* implemented if you select the No Security option here.

#### **User ID Security**

Select to enable PeopleSoft application security. Users are limited to the setID, business unit, credit card, company, institution set, origin, or item type specified by user ID. This chapter also discusses how to set up security for a user ID.

**Permission List Security** Select to enable PeopleSoft application security. Users are limited to the setID, business unit, credit card, company, institution set, origin, or item type specified by a permission list. All users in the permission list have the same security. This chapter also discusses how to set up security for permission lists.

**Item Type**

The following check boxes are available only if you select the User ID Security or Permission List Security options in the Item Type group box.

**Charge Reversals** Select to restrict the user to reverse only those item types that you define as charge item types.

**Payment Reversals** Select to restrict the user to reverse only those item types that you define as payment item types.

**Writeoff Reversals** Select to restrict the user to reverse only those item types that you define as write-off item types.

## Updating Student Financials Security Settings

To set up Student Financials security, use the Set Security component (RUNCTL\_SFSCRTY).

The Security Options page is delivered with no security set for each item on the page. The SF Load Security Views (Student Financials load security views) Application Engine process (SFRSCVW) that you run from this page updates system security with the selections on the Security Options page. You also must run this process if you modify any of the other pages used for Student Financials security—for example, when you modify information on the Permission List - Business Unit page. You do not need to run this process when you modify credit card security options.

This section discusses how to update security for Student Financials.

### Page Used to Update Student Financials Security Settings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Set Security	RUNCTL_SFSCRTY	Set Up SACR, Security, Secure Student Financials, Process, Set Security, Set Security	Run the SF Load Security Views SQR process (SFRSCVW) to update security changes and generate a security report.

## Updating Security for Student Financials

Access the Set Security page (Set Up SACR, Security, Secure Student Financials, Process, Set Security, Set Security).

<b>Business Unit</b>	Enter the business unit for which you want to update security. If you have multiple business units for which you must update security, run the process separately for each business unit.
<b>Generate Report</b>	Select to update security <i>and</i> generate a report. If you do not select this check box, the system only updates security.
<b>Run</b>	Click to run the SF Load Security Views process (SFRSCVW). When you run the process, the system also generates a report called the SF Load Security Views report.

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## Setting Security for SetIDs

To set up setID security, use two SetID components (SETID\_CLASS\_SECUR and SETID\_OPERATOR\_SEC).

Depending on the security option that you selected for setIDs on the Security Options page, you can grant access to a setID (tableset) using permission lists *or* user IDs. If you select no security for setIDs on the Security Options page, do not complete the pages listed in this section, because all user IDs and permission lists have access to all setIDs.

This section lists the pages used to set security for setIDs.

### Pages Used to Set Security for SetIDs

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Permission List - Set ID	SEC_SETID_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, SetID, SetID	Grant a selected permission list access to specific setIDs.
User ID - SetID	SEC_SETID_OPR	Set Up SACR, Security, Secure Student Financials, User ID, SetID, SetID	Grant a selected user ID access to specific setIDs.

## Setting Security for Business Units and Cashier Offices

To set up business unit and cashier office security, use two Business Unit components (SEC\_UNITSF\_OPR and UNIT\_CLASS\_SECURIT).

The pages discussed in this section enable you to grant security access to business units and to cashier offices within business units. If the institution does not use the cashiering feature, you do not need to set up cashier security, but you can set up business unit security.

Depending on the security option that you select for business units on the Security Options page, you should grant access to a business unit and cashier office using permission lists *or* user IDs. If you select no security for business units on the Security Options page, you do not need to complete the pages discussed in this section, because all user IDs and permission lists have access to all business units.

This section lists prerequisites and discusses how to:

- Grant a permission list access to business units and cashier offices.
- Grant a user ID access to business units and cashier offices.

### Prerequisites

Before you set security for business units and cashier offices, you must:

- Set up business units.
- Set up cashier offices.

### Pages Used to Set Security for Business Units and Cashier Offices

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Permission List - Business Unit	SEC_UNITSF_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Business Unit, Business Unit	Grant a permission list access to business units. Within a business unit, you can also grant permission to specific cashier offices.
User ID - Business Unit	SEC_UNITSF_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Business Unit, Business Unit	Grant a user ID access to business units. Within a business unit, you can also grant permission to specific cashier offices.

### Granting Permission List Access to Business Units and Cashier Offices

Access the Permission List - Business Unit page (Set Up SACR, Security, Secure Student Financials, Permission List, Business Unit, Business Unit).

**Business Unit**

Primary Permission List: PSADMIN

Find First 1 of 1 Last

Business Unit PSUNV PeopleSoft University Bursar \*Access Code ReadWrite

Find | View All First 1-2 of 2 Last

*Cashier's Office	*Access Code
MAIN Main Cashiering Office-7.5 Int	ReadWrite
HACIENDA Hacienda Cashiering Office	ReadWrite

### Permission List - Business Unit page

Enter the business unit that you want this permission list to access.

To grant the permission list access to a cashier office, select the cashier office (within the business unit) that you want this permission list to access.

If you do not want to grant access to a business unit or cashier office, do not include the business unit or cashier office on this page.

## Granting a User ID Access to Business Units and Cashier Offices

Access the User ID - Business Unit page (Set Up SACR, Security, Secure Student Financials, User ID, Business Unit, Business Unit).

Enter the business unit that you want this user ID to access.

To grant the user ID access to a cashier office, select the cashier office (within the business unit) that you want this permission list to access.

If you do not want to grant access to a business unit or cashier office, do not include the business unit or cashier office on this page.

## Setting Security for Item Types

To set up item type security, use these components: Item Type (SEC\_ITEM\_CLS and SEC\_ITEM\_OPR), Item Type Security (ITEM\_TYPE\_VW\_CLS), and View Item Type Security (ITEM\_TYPE\_VW).

Depending on the security option that you select for item types on the Security Options page, you grant access to item types using permission lists *or* user IDs. If you select no security for item types on the Security Options page, you do not need to complete the pages discussed in this section, because all user IDs and permission lists have access to all item types.

This section lists prerequisites and discusses how to:

- Set item type security by permission list.
- View item type security by permission list.
- Set item type security by user ID.
- View item type security by user ID.

## Prerequisites

Before you can set security for item types, you must:

- Grant permission lists access to business units on the Permission List - Business Unit page, if you are securing item types by permission list.
- Grant user IDs access to business units on the User ID - Business Unit page, if you are securing item types by user ID.
- Set up the item type tree in Student Financials.

## Pages Used to Set Security for Item Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Permission List - Item Type	SEC_ITEM_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Item Type, Item Type	Set item type security for a permission list within a business unit.
Permission List - View Item Type Security	SCRTY_ITEM_TYP_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Item Type Security, View Item Type Security	View item type security by permission list.  To view data on this page, you must set up item type security on the Permission Lists - Item Type page and have item type security set to permission list security on the Security Options page.
User ID - Item Type	SEC_ITEM_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Item Type, Item Type	Set item type security for a user ID within a business unit.

Page Name	Definition Name	Navigation	Usage
User ID - View Item Type Security	SCRTY_ITEM_TYPE	Set Up SACR, Security, Secure Student Financials, User ID, View Item Type Security, View Item Type Security	View item type security by user ID.  To view data on this page, you must set up item type security on the User ID - Item Type page and have item type security set to user ID security on the Security Options page.

## Setting Item Type Security by Permission List

Access the Permission List - Item Type page (Set Up SACR, Security, Secure Student Financials, Permission List, Item Type, Item Type).

**Item Type**

Business Unit: PSUNV Primary Permission List: CANPANLS

Find First 1 of 1 Last

\*Effective Date: 03/10/1997 \*Status: Active

Find | View All First 1-3 of 4 Last

Item Type Tree Node: HOUSING

Tree Node

Item Type Tree Node: PARKING

Tree Node

Item Type Item Type: 100000000001

Tree Node

Permission List - Item Type page

### Item Type

Select to grant access to a specific item type. After you select this option, you can select an item type from the available options.

### Tree Node

Enter to grant access to all item types within a specific node on the item type tree. If you enter a tree node, users have access to all items types defined within that node.

After you select this option, you can enter a tree node from the available options.

You can enter any combination of tree nodes and item types for the permission list to access. If you select a tree node, you do not need to separately list item types that fall under that tree node.

**Note.** If you enter the tree node *ALL*, which generally includes the whole tree, select No Security for item types on the Security Options page. Granting access to the whole item type tree provides virtually no security at all.

## Viewing Item Type Security by Permission List

Access the Permission List - View Item Type Security page (Set Up SACR, Security, Secure Student Financials, Permission List, Item Type Security, View Item Type Security).

View Item Type Security page

- Item Type** Enter the item type for which you want to review permission list access. After you enter an item type, information appears in the Permission List and User ID group boxes.
- Key Word** Displays the keyword if one is associated with the item type.
- Permission List** Displays the name of the permission list that has access to the selected item type.

## Setting Item Type Security by User ID

Access the User ID - Item Type page (Set Up SACR, Security, Secure Student Financials, User ID, Item Type, Item Type).

You can set access either by defining specific item types or by defining a node on the item type tree. If you select a tree node, the user ID can access all item types on that node of the tree.



**See Also**

[Chapter 17, "Securing Student Financials," Setting Item Type Security by Permission List, page 329](#)

**Viewing Item Type Security by User ID**

Access the User ID - View Item Type Security page (Set Up SACR, Security, Secure Student Financials, User ID, View Item Type Security, View Item Type Security).

**See Also**

[Chapter 17, "Securing Student Financials," Viewing Item Type Security by Permission List, page 330](#)

**Setting Security for Institution Sets**

To set up institution set security, use two Institution Set components (SEC\_ISET\_CLS and SEC\_ISET\_OPR).

Depending on the security option that you select for institution sets on the Security Options page, grant access to an institution set using permission lists *or* user IDs. If you select no security for institution sets on the Security Options page, you do not need to complete the pages listed in this section, because all user IDs and permission lists have access to all institution sets.

This section lists a prerequisite and lists the pages used to set security for institution sets.

**Prerequisite**

You must set up institution sets before you set security for them.

**Pages Used to Set Security for Institution Sets**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Permission List - Institution Set	SEC_ISET_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Institution Set	Grant permission lists access to specific institution sets.
User ID - Institution Set	SEC_ISET_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Institution Set, Institution Set	Grant user IDs access to specific institution sets.

## Overriding the Self-Service Institution Set

To set up self-service institution set overrides, use the Student Institution Set component (ISET\_OPR).

The User Profiles Management feature assigns institution sets to user IDs. You use the Self Service Institution Set Override page to change the institution set assigned by the User Profiles Management feature. By overriding the institution set on this page, instead of on the User Defaults 2 page, you can view a history of the changes.

This section lists prerequisites and discusses how to override the value for an institution set.

### Prerequisites

You must first set up institution sets and then assign a user ID to an institution set. A user ID must be assigned an institution set by the User Profiles Management Application Engine process (USERPROFILE) to have an institution set appear in the Calculated Value field on the Self Service Institution Set Override page.

#### See Also

[Chapter 19, "Creating and Maintaining User Profiles," page 351](#)

### Page Used to Override the Self-Service Institution Set

Page Name	Definition Name	Navigation	Usage
Self Service Institution Set Override	ISET_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Student Institution Set, Self Service Institution Set Override	Override the value for an institution set that was assigned to the user ID by the User Profiles Management feature.

### Overriding the Value for an Institution Set

Access the Self Service Institution Set Override page (Set Up SACR, Security, Secure Student Financials, User ID, Student Institution Set, Self Service Institution Set Override).

### Self Service Institution Set Override

**User ID:** PS Locherty, Betty

**Institution Set:**  All PeopleSoft Business Units **Calculated Value**  
PSUNV PeopleSoft University

Self Service Institution Set Override page

<b>Institution Set</b>	Enter an institution set to make this value the default for this user ID in the user profile.
<b>Calculated Value</b>	Displays the institution set value assigned to the user ID by the User Profiles Management feature. If you do not use the User Profiles Management feature, no value appears in this field.  The calculated value is the same as the Institution Set field on the User Defaults 2 page.

**See Also**

[Chapter 21, "Setting User Defaults," page 387](#)

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## Setting Security for Companies

To set up company security, use two Company components (SEC\_COMPANY\_CLS and SEC\_COMPANY\_OPR).

Depending on the security option that you select for companies on the Security Options page, you grant access to companies using permission lists *or* user IDs. If you select no security for companies on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all companies.

Companies are used in PeopleSoft Human Resources for payroll and pay groups. An employee's company is usually designated as the company that pays the employee's salary. You must set up company security so that you can access certain values when setting up Student Financials.

This section lists prerequisites and lists the pages used to set security for companies.

### Prerequisites

You must first set up the company codes and permission lists.

### Pages Used to Set Security for Companies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Permission List - Company	SEC_COMPANY_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Company	Grant a permission list access to the transactions for particular companies.
User ID - Company	SEC_COMPANY_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Company	Grant a user ID access to the transactions for particular companies.

## Setting Security for Origin IDs

To set up origin ID security, use two Origin ID components (SEC\_ORIGIN\_CLS and SEC\_ORIGIN\_OPR).

Depending on the security option that you select for origin on the Security Options page, grant access to an origin ID using permission lists *or* user IDs. If you select no security for origin IDs on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all origin IDs.

This section discusses how to:

- Grant a permission list access to origin IDs.
- Grant a user ID access to origin IDs.

### Pages Used to Set Security for Origin IDs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Permission List - Origin	SEC_ORIGIN_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Origin ID, Origin	Grant a permission list access to origin IDs.  You must first grant permission lists access to business units on the Permission List - Business Unit page.
User ID - Origin	SEC_ORIGIN_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Origin IDs, Origin	Grant a user ID access to origin IDs.  You must first grant user IDs access to business units on the Use ID - Business Unit page.

### Granting a Permission List Access to Origin IDs

Access the Permission List - Origin page (Set Up SACR, Security, Secure Student Financials, Permission List, Origin ID, Origin).

*Origin ID		*Access Code	
<input type="text" value="00008"/>	Financial Aid Office	<input type="text" value="Read/Write Access"/>	
<input type="text" value="00009"/>	Parking Office	<input type="text" value="Read/Write Access"/>	
<input type="text" value="00010"/>	Housing Office	<input type="text" value="Read/Write Access"/>	
<input type="text" value="00011"/>	Facilities Management	<input type="text" value="Read/Write Access"/>	
<input type="text" value="00012"/>	Library	<input type="text" value="Read/Write Access"/>	

Permission List - Origin page

Enter the origin ID that you want the permission list to access. If you do not want to grant access to an origin ID, do not include the origin ID on this page.

## Granting a User ID Access to Origin IDs

Access the User ID - Origin page (Set Up SACR, Security, Secure Student Financials, User ID, Origin IDs, Origin).

### See Also

[Chapter 17, "Securing Student Financials," Granting a Permission List Access to Origin IDs, page 334](#)

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## Setting Security for Credit Cards

To set up credit card security, use two Credit Card and Bank Account components (SEC\_CC\_CLS and SEC\_CC\_OPR).

Depending on the security option that you select for credit cards on the Security Options page, grant access for viewing credit card numbers using permission lists *or* user IDs. If you select no security for credit cards on the Security Options page, you do not need to complete the pages listed in this section.

**Warning!** If you select no security for credit cards on the Security Options page, all users can view the entire credit card number.

When you assign credit card security on the two pages listed in this section, you are granting the user ID or permission list access to view the entire credit card number. This security should be granted to only a few people in the institution. User IDs and permission lists to which you do not grant credit card security access can view only the last four digits of the credit card number.

---

## Pages Used to Set Security for Credit Cards

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Permission List - Credit Card and Bank Account	SEC_CC_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Credit Card and Bank Account, Credit Card and Bank Account	Grant a permission list the ability to view the entire credit card number. You must first set up permission lists.
User ID - Credit Card and Bank Account	SEC_CC_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Credit Card and Bank Account	Grant a user ID the ability to view the entire credit card number. You must first set up user IDs.

## Chapter 18

# Securing Contributor Relations

This chapter discusses how to:

- Set up Institution table security.
- Define and secure Contributor Relations business units and setIDs.

### **See Also**

*PeopleSoft Contributor Relations 9.0 PeopleBook, "Setting Up Your Contributor Relations Framework"*

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## Setting Up Institution Table Security

To set up institution table security, use the Academic Institution Security component (SCRTY\_TABL\_INST).

This section discusses how to set institution table security.

### Page Used to Set Up Institution Table Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Institution Security	SCRTY_TABL_INST	<ul style="list-style-type: none"><li>• Set Up SACR, Security, Secure Student Administration, User ID, Academic Institution Security, Academic Institution Security</li><li>• Set Up SACR, Security, Secure Contributor Relations, Secure Institution Table, Academic Institution Security</li></ul>	Set up security access for users at academic institutions.

## Setting Institution Table Security

Access the Academic Institution Security page (Set Up SACR, Security, Secure Student Administration, User ID, Academic Institution Security, Academic Institution Security).

*Academic Institution	Access Code
PSUNV	Read/Write

Academic Institution Security page

### Academic Institution

Provide the user with access to the system for that institution. When entered, the user automatically has read/write access to all the data related to that institution.

If a user is given access to only one institution, that institution defaults on all pages requiring an institution.

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## Defining and Securing PeopleSoft Contributor Relations Business Units and SetIDs

To define and security Contributor Relations business units and setIDs, use these components: Business Unit CR (AV\_BUS\_UNIT), Functional Group Security (AV\_FUNC\_GRP\_TBL), Functional Group Components (AV\_CMPNT\_FUNC), and Secure Business Unit (AV\_SCRTY\_BU\_TBL).

This section provides overviews of Contributor Relations business units and setIDs, business units and the Commitment Entry process, and business units and the Membership process and discusses how to:

- Create Contributor Relations business units.
- Implement functional group security.
- Define functional group components.
- Choose component search record settings.
- Secure Contributor Relations business units.
- Examine a Query Security example.



## Understanding Contributor Relations Business Units and SetIDs

Establishing business unit structure for Contributor Relations enables you to efficiently secure and segment data. This organizational structure may differ from the structure set up to support other PeopleSoft applications at the institution. You can define business units that reflect the functional needs of the institution, and setIDs for sharing tables with setup values. This structure enables you to define data segmentation based on business rules. In addition, query and reporting capabilities become more powerful for the institution and the individual user.

In Contributor Relations, both the membership and commitment entry portions of the system are secured at the business unit level.

In addition, the system is delivered with a set of defined functional groups that represent the business processes impacted by business units. For each functional group, determine whether or not to implement user level security. If user security is selected for any functional group, establish user access to appropriate business units.

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**Warning!** Before creating and securing business units, think carefully about how to set up the institutional structure and about what information particular users need to access. After you define a structure, you cannot delete a business unit to protect historical data related to a business unit.

---

## Understanding Business Units and the Commitment Entry Process

The following process describes how business units work within the commitment entry process. This process assumes that you have already set up an operational structure, including business units and setIDs, and secured them.

To work with business units throughout the commitment entry process:

1. Define setup values for commitment entry.

These include defining values for designations, initiatives, and appeals.

2. Set up user defaults for institution, business unit, and setID using the Operator Defaults page.

These default Values are: used throughout the system. In addition, select defaults for designation business units.

3. Open a new gift or pledge session.

Each session is associated with a business unit. Within the session, commitments can be designated to one or more business units. After a session is established, default designation business units, designation, initiative, and appeal can be defined using the Session Defaults page. These defaults override any user defaults that have been defined. Session defaults can also be changed at any point during the transaction entry process.

### See Also

[Chapter 21, "Setting User Defaults," Entering User Defaults, page 387](#)

*PeopleSoft Contributor Relations 9.0 PeopleBook*, "Entering Commitments," Selecting Session Defaults

## Understanding Business Units and the Membership Process

The following process describes how business units work within the membership process. This process assumes you have already set up an operational structure, including business units and setIDs, and secured it. The process also assumes you have defined user defaults and setup values for the commitment entry process.

To work with business units throughout the membership process:

1. Define setup values for membership including appeals, membership types, and membership categories.

See *PeopleSoft Contributor Relations 9.0 PeopleBook*, "Setting Up Initiatives," Setting Up Membership Initiatives.

2. Create a member organization within a business unit.

3. Define member dues for the member organization.

When defining dues, specify default designations to which dues payments are allocated. Select a designation business unit, designation, initiative code, and amount for each designation to which a portion of the dues payment is allocated.

See *PeopleSoft Contributor Relations 9.0 PeopleBook*, "Managing Membership," Creating a Member Organization.

4. Create a membership initiative. Select a business unit to associate with the membership initiative.

This "owner" business unit controls the available prompt values when selecting a responsible department, selecting an associated member organization, defining annual goals, selecting a public relations appeal, and selecting an appeal for a budget expense.

See *PeopleSoft Contributor Relations 9.0 PeopleBook*, "Managing Initiatives," Defining an Initiative.

5. Receive a membership payment/open a membership session.

Select a business unit for the session. When you assign membership dues designations, the values defined on the Member Dues page populate the fields on the Designations page. You can edit the Initiative and Amount fields.

See *PeopleSoft Contributor Relations 9.0 PeopleBook*, "Managing Membership," Entering Member Dues.

### **Contributor Relations Business Unit Security and PeopleSoft Query**

Business unit security is applied to functional groups within Contributor Relations through a user-defined setting based on components not records. Therefore, it has not been applied to PeopleSoft Query. Contributor Relations records are delivered in the system without a Query Security Record attached, but an example of how you could extend business unit security to PeopleSoft Query is provided.

Remember that you can use business units within Contributor Relations in two ways.

The first is the business unit owning the transaction (such as gift, pledge, member payment), and the second is the designation business unit or the business unit to which some portion of a transaction amount is directed. The first is represented by the BUSINESS\_UNIT field throughout the system, while the second is represented by the AV\_DES\_BU field. In most cases, business unit security is applied to the AV\_DES\_BU field throughout the system when invoked. There are, however, some cases where the business unit security setting is applied to the owning business unit as opposed to the designation business unit. When designing queries and query security records, deciding where to apply the security affects which query security record is used and what data is returned. If securing by owning business unit, the query security record AV\_BU\_SCRTY\_VW is used, and if securing by designation business unit, the query security record AV\_BU\_SCRTY\_DES should be used.

Applying security to both business unit types in a query most likely does not produce the desired result. For example, take an installation that has three business units BU1, BU2, and BU3. A gift is entered by business unit BU1 and some of the gift is directed toward a designation fund in BU3. A user exists who has security access to see the gift information for BU3 only. If query security is applied at the owning business unit level, the user is then prevented from seeing that portion of the gift directed to their business unit. If both owning business unit and designation business unit security are applied in a query at the same time, the owning business unit application prevents the designation business from even being considered. If the query security is applied at the designation business unit level only, the user can only see that portion of the gift that was given to their business unit.

## Pages Used to Define and Secure Contributor Relations Business Units and SetIDs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Business Unit CR (Contributor Relations)	AV_BUS_UNIT_TBL	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Business Unit CR, Business Unit CR	Define the business units at the institution from a cultivation and fund-raising perspective.
Functional Group Security	AV_FUNC_GRP_TBL	Set Up SACR, Security, Secure Contributor Relations, Functional Group Security, Functional Group Security	Determine whether to implement user-level business unit security for the various functional groups in the system. Functional groups are delivered with the system as translate values and represent the business processes that use business unit functionality in the system. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Component Function	AV_CMPNT_FUNC	Set Up SACR, Security, Secure Contributor Relations, Functional Group Components, Component Function	Identify the components in the system that make up a functional group. The components in a functional group inherit the security settings you define for that group on the Functional Group Security page.
Component Search Records	AV_BU_SCRTY_REC	Click the Srch Recs link on the Component Function page.	View or select search views for components based upon the type of security used when accessing them.
CR Business Unit Security (Contributor Relations business unit security)	AV_SCRTY_BU_TBL	Set Up SACR, Security, Secure Contributor Relations, Secure Business Unit, CR Business Unit Security	Grant a user security access to one or more business units at the institution.

## Creating Contributor Relations Business Units

Access the Business Unit CR page (Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Business Unit CR, Business Unit CR).


### Business Unit CR


**Business Unit:** MEDBU


**\*Description:**


**Short Description:**


**\*Institution:**  PeopleSoft University

**\*Base Currency:**   US Dollar

**\*Rate Type:**   Official Rate

**Tender Type:**  

**General Ledger Unit:**  

**Merchant ID:**   Contributor Relations Merchant

Business Unit CR

<b>Institution</b>	Enter the name of the institution to which the business unit belongs. If you have already saved the business unit, this field is display-only. If a business unit is assigned to a different institution, a new business unit CR should be created.
<b>Base Currency</b>	Enter the base currency to default when entering transactions or working with financially driven Contributor Relations processes within this CR business unit.
<b>Rate Type</b>	Enter the exchange rate to use when translating amounts to the base currency for this business unit. Examples of rate type are <i>Official Rate</i> , <i>Spot Rate</i> , and <i>Free Market Rate</i> .
	<hr/> <b>Note.</b> Transactions entered in the system are translated from the session currency to the institution's base currency using the rate type on the Institution Defaults page. The business unit base currency setting is used as the default currency code for all membership and gift sessions created for a business unit, but can be overridden. <hr/>
<b>Tender Type</b>	Enter the default tender type to use when entering transactions for this business unit. Tender types are defined on the Tender Types page. The tender type is used as the default tender type for all membership and gift sessions created for this business unit, but can be overridden.
<b>General Ledger Unit</b>	Enter the business unit at the institution where GL data for this Contributor Relations business unit is stored. Tying data to this general ledger unit enables you to structure Contributor Relations business units differently than other business units at the institution. The business units you define are tied back to the general ledger business units through this field.
<b>Merchant ID</b>	To define the credit card merchant information and credit card default options for each business unit, enter the merchant ID from the CR Merchant table. You must associate each business unit with a merchant ID.  See <i>PeopleSoft Contributor Relations 9.0 PeopleBook</i> , "Setting Up Commitment Management," Defining Connection Parameters for a Third-Party Processor.

### **Examples**

The following scenarios represent two different ways an institution might set up Contributor Relations business units.

PeopleSoft University A is a single campus institution. This institution's business units are organized along individual schools, with some degree of centralization. Its business units include:

- Medical School Business Unit.
- Law School Business Unit.
- PeopleSoft University Business Unit (Centralized Business Unit for all standard schools. For example, School of Arts and Sciences, School of Business, and School of Education).

PeopleSoft University B is a multi-campus institution, and its business units are organized by its various locations. Its business units include:

- Main Campus business unit.
- Extension Campus business unit.
- Online Campus business unit.

## Implementing Functional Group Security

Access the Functional Group Security page (Set Up SACR, Security, Secure Contributor Relations, Functional Group Security, Functional Group Security).

Functional Group Security Level		Find	View All	First	1-4 of 4	Last
*Functional Group:	Gift/Pledge Entry	<input checked="" type="radio"/>	None	<input type="radio"/>	Operator	
*Functional Group:	Gift/Pledge Inquiry	<input checked="" type="radio"/>	None	<input type="radio"/>	Operator	
*Functional Group:	Membership Entry	<input checked="" type="radio"/>	None	<input type="radio"/>	Operator	
*Functional Group:	Membership Inquiry	<input checked="" type="radio"/>	None	<input type="radio"/>	Operator	

Functional Group Security page

### **Functional Group Security Level**

**Functional Group**

Select a functional group to define security for the group. Functional groups are delivered with the system and represent the major business processes in the system that are affected by business unit. The functional groups delivered with the system cannot be removed or amended.

**Functional Security**

Select *None* to allow the components that make up this functional group to be accessed without user-level business unit security. Select *Operator* to allow access only with business unit security. If you select operator, the access you grant users on the Secure Business Unit page determine what information a user can access within the functional group.

## Refresh Security

If you make changes to the Functional Security selection for any functional group, this button appears. Run the Refresh Security Process to activate any changes made to security settings. The Refresh Security process is an Application Engine program that synchronizes the component search records and prompt edit table values with the setup of the PSSTATUS table. Updating this value ensures that all Application Servers use the latest version. This is not limited to Contributor Relations; it impacts all PeopleSoft applications sharing the database. When you run this process, check the Process Monitor to verify that it runs successfully and the Message Log for a detailed list of the changes implemented. See the warning in this section prior to running this process.

---

**Warning!** After running the Refresh Security process, you must delete all cache files. You must also re-run the PeopleTools process that creates a shared cache file for multiple application servers. This process impacts all applications sharing this database! Contact your IT Support Staff before running this process.

---

## Defining Functional Group Components

Access the Component Function page (Set Up SACR, Security, Secure Contributor Relations, Functional Group Components, Component Function).

Component Function						
Component Functional Group Assignment						
Customize   Find   View All   First 1-8 of 59 Last						
	*Component Name	*Functional Group	Security	Srch Recs		
1	AV_ADJ_GIFT	Gift/Pledge Entry	None	<a href="#">Srch Recs</a>	+	-
2	AV_ADJ_MBR	Membership Entry	None	<a href="#">Srch Recs</a>	+	-
3	AV_ADJ_PLEDGE	Gift/Pledge Entry	None	<a href="#">Srch Recs</a>	+	-
4	AV_BTCH_M_TOT	Membership Entry	None	<a href="#">Srch Recs</a>	+	-
5	AV_BTCH_PL_TOT	Gift/Pledge Entry	None	<a href="#">Srch Recs</a>	+	-
6	AV_BTCH_TOT	Gift/Pledge Entry	None	<a href="#">Srch Recs</a>	+	-
7	AV_CMTMT_SMRY	Gift/Pledge Inquiry	None	<a href="#">Srch Recs</a>	+	-
8	AV_CMTMT_SMRY_E	Gift/Pledge Inquiry	None	<a href="#">Srch Recs</a>	+	-

Component Function page

---

**Warning!** If the security determination process is run on a component that's not assigned to a functional group on this page, the system displays a warning alerting you to the missing setup values, and the component is accessed without business unit security activated. The system is delivered with all of the appropriate components assigned to their respective functional group. Do not make any changes to these settings unless the institution is adding business unit functionality not provided by Contributor Relations.

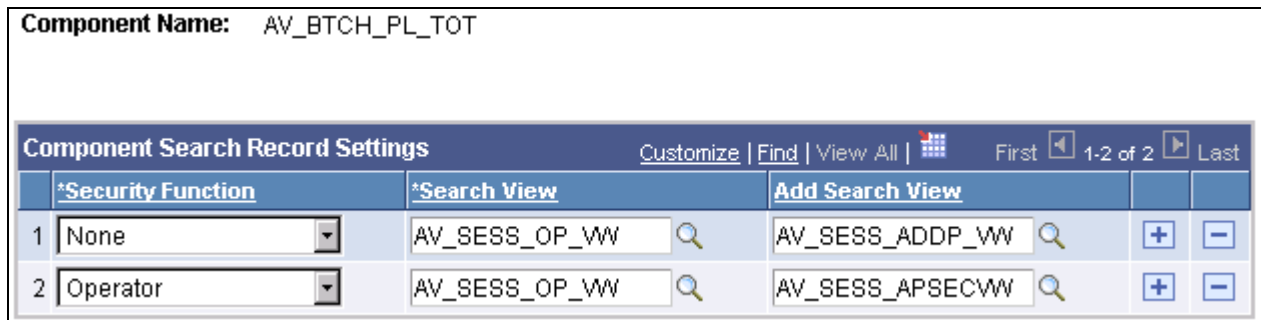
---

### Component Functional Group Assignment

- Component Name**                      Enter the component being assigned to a functional group. Components are groupings of pages. You can select from a list of all the valid components in the system.
  
- Functional Group**                      Select the name of the functional group to which the component belongs. Functional groups are delivered with the system and represent major business processes in the system that use CR business unit security.
  
- Security**                                      If you have defined security for the CR functional group you select, the security option appears. Valid security options include *Operator* or *None*. Select operator to limit access to the component based on CR business units.
  
- Srch Recs** (search records)              Click if user-level security for a component is controlled at the search record level. The Component Search Record Settings page displays.

### Choosing Component Search Record Settings

Access the Component Search Record Settings page (click the Srch Recs link on the Component Function page).



Component Search Record Settings page

---

**Warning!** The system is delivered with all search views assigned to the appropriate components. Do not make any changes to these settings unless the institution is adding business unit functionality not provided by Contributor Relations.

---

- Security Function**                      Select *None* or *Operator* to determine the type of security for which you are selecting search views.
  
- Search View**                                      Enter the search view to associate with the component for the security function you selected. The prompt lists all valid search views.



**Add Search View**

If a component is configured to allow you to add a new record, and the search view to create a new record is different than the Update/Display search record, specify an add search view. For example, you want *NEW* in the session number field instead of blank by default.

The following components are secured at the search view level:

<b>Functional Group</b>	<b>Component</b>	<b>Description</b>
Gift/Pledge Entry	AV_BTCH_TOT	Balance Session
	AV_BTCH_PL_TOT	Pledge Balanced Session
	AV_PLDG_SCHD_ADJ	Pledge Schedule Adjustment
	AV_PLDG_SCHED_ADJ_E	Org Pledge Schedule Adjustment
Gift/Pledge Inquiry	AV_PLDG_SCHD_INQ	Pledge Schedule Inquiry
	AV_PLDG_SCHD_INQ_E	Org Pledge Schedule Inquiry
	AV_SPR_GIFT_SMRY	Supervisor Gift Summary
	AV_SPR_PLEDGE_SMRY	Supervisor Pledge Summary
Membership Entry	AV_MEMBERSHIP	Manage Member Organization
	AV_BTCH_M_TOT	Membership Balance Session
Membership Inquiry	AV_SPR_MBRSH_P_SMRY	Supervisor Membership Summary

**Securing Contributor Relations Business Units**

Access the CR Business Unit Security page (Set Up SACR, Security, Secure Contributor Relations, Secure Business Unit, CR Business Unit Security).

CR Business Unit Security				
User ID: AD6159		Pierce,Anna		
*Business Unit		Access Code		
1	LAWBU	Law BU	Read/Write	+ -
2	MEDBU	Medical Business Unit	Read/Write	+ -

CR Business Unit Security page

**Business Unit** Enter the business unit for which you want to grant the user access.

**Access Code** Indicates the type of access a user has to a particular business unit. Since security is granted when you add a row to this table, this field displays a value of *Read/Write*.

## Examining a Query Security Example

The two methods of applying business unit security to PeopleSoft Query are:

- Using the PeopleTools Query Security Record function and one of the delivered Business Unit Security records (AV\_BU\_SCRTY\_VW and AV\_BU\_SCRTY\_DES).

Use this method to provide records for which the user population can create queries that are automatically secured by PeopleTools.

- Using a subquery and the query metastring %OPERATORID.

Use this method to develop queries that are created centrally for the user population but available for users to run on their own.

Three delivered queries are provided to illustrate the two methods:

- AV\_SECURITY\_EXAMPLE\_NONE
- AV\_SECURITY\_EXAMPLE\_SECURED
- AV\_SECURITY\_EXAMPLE\_SECURED2

### **Unsecured Example**

The query AV\_SECURITY\_EXAMPLE\_NONE is an unsecured query of Recognitions with the following criteria:

- Credit type *Hard*.
- Person recognitions only.
- Posted.
- Not adjusted.

- Institution equal to *PSUNV*.

The result of this query is the data to which the query security is applied in the next two examples. To see the effect on the query results with each type of setup, run the query as a user with access to all business units and then as a user with access to only one business unit.

<b>Owning Unit</b>	<b>Sess No</b>	<b>Gift No</b>	<b>Gift Amt</b>	<b>Gift Type</b>	<b>ID</b>	<b>Name</b>	<b>Recog</b>	<b>Recog Amt</b>	<b>Recog %</b>
MEDBU	92	200	2,500 USD	PP	AV0008	Carroll, James	Hard Credit	2,500 USD	100
MEDBU	92	201	500 USD	PP	AV0010	Kuney, Dara	Hard Credit	500 USD	100
PSUNV	69	134	100 USD	G	DM0049	Nguyen, Kimberly	Hard Credit	100 USD	100
PSUNV	70	135	250 USD	G	DM0041	Chang, Zheng	Hard Credit	250 USD	100
PSUNV	70	136	250 USD	G	DM0040	Szymborski, William	Hard Credit	250 USD	100
PSUNV	71	137	50 USD	G	DM0040	Szymborski, William	Hard Credit	50 USD	100
PSUNV	71	138	100 USD	G	DM0040	Szymborski, William	Hard Credit	100 USD	100
PSUNV	71	139	USD 150	G	DM0040	Szymborski, William	Hard Credit	150 USD	100
PSUNV	71	140	200 USD	G	DM0040	Szymborski, William	Hard Credit	200 USD	100
PSUNV	71	141	200 USD	G	DM0040	Szymborski, William	Hard Credit	200 USD	100
PSUNV	71	142	250 USD	G	DM0040	Szymborski, William	Hard Credit	250 USD	100

### PeopleTools Query Security Record Function

The next query, AV\_SECURITY\_EXAMPLE\_SECURED, includes a record, AV\_RECOG\_SEC\_VW, that has a security view attached to it via the Query Security Record attribute. In this case, the Query Security Record is AV\_BU\_SCRTY\_DES. This record is a view of PS\_AV\_SCRTY\_BU\_TBL that substitutes the AV\_DES\_BU field for the Business Unit field. When a record has a Query Security View attached, PeopleSoft Query automatically adds a filter of {Security\_Record}.OPRID = %OPERATORID. At runtime, the %OPERATORID string is substituted with the user ID of the current user. PeopleTools also joins the record and its Query Security record by other common keys. In this manner, the user only sees the AV\_RECOG\_SEC\_VW records to which they have security.

With the same data set and a user who only has access to the business unit *MEDBU*, the results are as follows (notice the absence of any data for the *PSUNV* business unit):

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
MEDBU	92	200	USD 2,500	PP	AV0008	Carroll, James	Hard Credit	USD 2,500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100

### Using a Subquery for Security

The final query, AV\_SECURITY\_EXAMPLE\_SECURED2, is similar to the unsecured example discussed previously in that it uses the base unsecured tables. In this case, however, a subquery is added to provide the join to the Business Unit Security table and only return rows to which the current user has authority. Because security is applied to the designation business unit in this example, the record AV\_RCG\_DES is substituted for the record AV\_RECOGNITION from the unsecured query. The field AV\_DES\_BU is now available for applying the query security. The subquery appears as a filter on the AV\_DES\_BU field when the Criteria tab is selected. The subquery uses the AV\_SCRTY\_BU\_TBL and criteria of OPRID = %OPERATORID to substitute the user ID of the user currently executing the query.

With the same data set and a user who only has access to the business unit *MEDBU*, the results are as follows (notice the absence of any data for the *PSUNV* business unit):

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Reco g	Recog Amt	Recog %
MEDBU	92	200	2,500 USD	PP	AV0008	Carroll, James	Hard Credit	2,500 USD	100
MEDBU	92	201	500 USD	PP	AV0010	Kuney, Dara	Hard Credit	500 USD	100

## Chapter 19

# Creating and Maintaining User Profiles

This chapter provides an overview of user profiles security and discusses how to:

- Prepare for user profiles management.
- Set up user profiles management.
- Run the User Profiles Management process.
- Generate password notification letters.
- Resolve issues for the User Profiles Management process.

---

## Understanding User Profiles Security

To provide self-service access to an individual, create a user profile by selecting PeopleTools, Security, User Profiles, User Profiles. You then add a password and all the security that the individual needs to access the site. The User Profiles Management process enables you to create and maintain user profiles in batch. You must understand how a user profile is created before you run the User Profiles Management process.

---

**Warning!** Before you use this process, make sure that you understand how PeopleTools security works. When you provide database access to a large number of people, you can only revoke the access manually. A user with a high level of security in the institution should be in charge of running and setting up the process. Few people should have access to the user profiles management setup and process pages.

---

The User Profiles Management Application Engine process (USERPROFILE) consists of four main processes. These processes enable you to:

- Create new user profiles and add role for the user IDs.
- Delete a role from user profiles.
- Add a role to existing user profiles.
- Assign user preferences (default values) for the user IDs, including security values needed for the online credit card process.

You can run these four processes individually or all at once. The User Profiles Management process runs the four processes one role at a time. The mass change selects a group of people—for example, applicants—and then runs the processes based on a role (for example, the Applicant role). Each of the processes uses temporary tables so you can validate the processes' actions. These temporary tables are useful if you run the User Profiles Management process for many roles at once. A cleanup page enables you to delete these temporary tables.

The User Profiles Management process enables you to create user profiles and assign user IDs and passwords to groups of individuals. You can select which algorithms to use for creating the user ID and password and assign a checklist, a communication, or a comment to the user ID. The communication can include a letter that informs new users of their user IDs and passwords for access to the web.

The User Profiles Management process also enables you to maintain existing user profiles by adding or deleting roles to grant or remove page access. It can also set up the user preferences, which are default values, for basic fields like Academic Career and Academic Institution. If the institution accepts credit cards, you can use the feature to give appropriate security access for the online credit card functionality. The system uses mass changes to select the population of individuals for whom you want to create or maintain user profiles.

### **See Also**

*PeopleTools PeopleBook: Security Administration*

*Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table* on My Oracle Support, ID 751540.1.

## **Delivered Mass Changes for User Profiles Management**

Several mass change examples that you can use with the User Profiles Management process are delivered with this application.

These mass change examples are delivered:

- Userprofile - Advisor.
- Userprofile - Applicant.
- Userprofile - Contributor.
- Userprofile - Employee.
- Userprofile - Former Student.
- Userprofile - Fundraiser.
- Userprofile - Graduate.
- Userprofile - Instructor.
- Userprofile - Prospect.
- Userprofile - Recruiter.
- Userprofile - Student.

---

**Note.** If you elect to use the Dynamic Role Member Assignment process (DYNROLE\_PUBL) that is provided with PeopleTools to assign roles to already existing user IDs make sure the queries you create have the same criteria as the mass changes you are using.

---

The *PeopleTools PeopleBook: Security Administration* contains more information about the Dynamic Role Member Assignment process.

---

## Preparing for User Profiles Management

Before you run the User Profiles Management process, you must complete the setup described in this section. You should complete the setup in the order shown.

---

**Warning!** Make sure you understand PeopleSoft security before you attempt to use the User Profiles Management process.

---

This section provides an overview of the creation of the model user ID and discusses how to:

1. Create the model user ID.
2. Enter the model user ID description.
3. Set up the roles.
4. Set up permission lists.
5. Set up primary permission lists.
6. Set up mass changes.
7. Set up event IDs for the communication, checklist, and comment (3C) engine.
8. Set up communications.
9. Set up checklists.
10. Set up comments.

### **See Also**

*PeopleTools PeopleBook: Security Administration*

## Understanding the Creation of the Model User ID

The User Profiles Management process creates user profiles based on a user ID that serves as a model. You create user IDs or user profiles in the User Profiles component USERMAINT (PeopleTools, Security, User Profiles, User Profiles).

For example, use the delivered model user ID *SCC\_MODEL* for the Campus Solutions model. You only need to complete the first two pages in the User Profiles component. The other pages in the component do not contain any fields that the User Profiles Management process uses.

## Pages Used to Prepare for User Profiles Management

Page Name	Definition Name	Navigation	Usage
User Profiles - General	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles, General	Create a user ID that the User Profiles Management process uses as a clone (model) for creating user profiles.
User Profiles - ID	PSOPRALIAS	PeopleTools, Security, User Profiles, User Profiles, ID	Enter the ID type <i>None</i> and a description for the model user ID that the User Profiles Management process uses for creating user profiles.

## Creating the Model User ID

Access the User Profiles - General page (PeopleTools, Security, User Profiles, User Profiles, General).

The screenshot displays the 'User Profiles - General' configuration page. At the top, there are tabs for 'General', 'ID', 'Roles', 'Workflow', 'Audit', 'Links', and 'User ID Queries'. The 'General' tab is active. The page contains the following fields and options:

- User ID:** SCC\_MODEL
- Description:** [PS] CC - User Profiles Proces
- Account Locked Out?**
- Logon Information:**
  - Symbolic ID:** sa1
  - Password:** [masked]
  - Confirm Password:** [masked]
  - Expire password at next login**
  - User ID Alias:** [empty field]
  - [Edit Email Addresses](#)
- General Attributes:**
  - Language Code:** English
  - Currency Code:** [empty field]
  - Default Mobile Page:** [empty field]
  - Enable Expert Entry**
- Permission Lists:**
  - Navigator:** [empty field] [Explain](#)
  - Homepage:** [empty field] [Explain](#)
  - Process Profile:** [empty field] [Explain](#)
  - Primary:** [empty field] [Explain](#)
  - Row Security:** [empty field] [Explain](#)

User Profiles - General page

Add a new value to create a user ID or used the delivered example called SCC\_MODEL.

---

**Note.** The Account Locked Out functionality is not cloned for the user profiles created in batch. When the user profiles are created, they are ready for the self-service users to access the site.

---



The system clones these fields to create these user profiles: Symbolic ID, Language Code, Navigator Homepage, Process Profile, Primary, and Row Security.

You should *always* select a symbolic ID, regardless of the role for which you are running the process. For example, if you are running the process using the role Prospects and you believe the role does not need a symbolic ID, then consider that when prospects become applicants or students, they *do* need a symbolic ID. There is no background process to create one.

Enter a password and confirm it. These fields are required on this page, but the system *does not* clone the password when you create the new user IDs.

### See Also

[Chapter 19, "Creating and Maintaining User Profiles," Setting Up Permission Lists, page 356](#)

## Entering the Model User ID Description

Access the User Profiles - ID page (PeopleTools, Security, User Profiles, User Profiles, ID).

The screenshot displays the 'User Profiles - ID' page. At the top, there are navigation tabs: General, ID (selected), Roles, Workflow, Audit, Links, and User ID Queries. Below the tabs, the 'User ID' is set to 'SCC\_MODEL' and the 'Description' is '[PS] CC - User Profiles Proces'. A section titled 'ID Types and Values' contains a dropdown menu for '\*ID Type:' set to 'None'. Below this is a table with three columns: 'Attribute Name', 'Attribute Value', and 'Description'. The table is currently empty. At the bottom, the 'User Description' section has a text input field with the same description as above and a link labeled 'Set Description' followed by the text 'or type in User Description.'

### User Profiles - ID page

The system uses none of the fields on this page during the User Profiles Management process. However, the component requires an ID type. Select an ID type of *None*. This value is not cloned by the User Profiles Management process. Use the User Profiles Mass Creation setup page to set up the ID type to use for the user profiles that you create.

**Attribute Value**                      The process automatically adds a value for each user profile that you create.

## ***User Description***

**Description** Enter the name for the model user ID.

---

**Note.** You do not need to enter any other fields than the ones described when you create the model user ID to be used by the User Profiles Management process. None of the fields on this page are cloned.

---

## **Setting Up the Roles**

You must define the roles that the User Profiles Management process assigns to self-service users. For example, you might want to have roles for applicants, students, prospects, instructors, or recruiters.

Consider the names of the delivered mass changes when creating the roles. For example, the mass change User Profile - Applicant could be used to assign the role of Applicant. Refer to the list of delivered mass changes earlier in this chapter.

### **See Also**

Chapter 19, "Creating and Maintaining User Profiles," Setting Up Mass Changes, page 356

## **Setting Up Permission Lists**

You must set up a permission list to give self-service users access to pages. You should at least give self-service users access to the Campus Personal Information pages if you licensed the PeopleSoft Campus Self Service product. You set up permission lists in the Permission Lists component (PeopleTools, Security, Permissions & Roles, Permission Lists).

### **See Also**

*PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Campus Personal Information"*

## **Setting Up Mass Changes**

For each role that you create, you must create a corresponding mass change to define the search criteria that will identify a population. The PeopleSoft system comes with several mass change examples that you can use to create your own.

### **See Also**

Chapter 19, "Creating and Maintaining User Profiles," Delivered Mass Changes for User Profiles Management, page 352

*PeopleTools PeopleBook: Data Management, "Mass Change"*

## Setting Up Event IDs for the 3C Engine

To assign a communication, checklist, or comment to the user IDs that you create with the User Profiles Management process, you must set up a 3C engine event ID.

### See Also

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine," Defining the 3C Engine Events

## Setting Up Communications

To send a letter to notify new users of their user IDs and passwords, set up a communication. Make sure the letter code that you create in the Standard Letter table has these characteristics:

- Function equal to *Gen* (general).
- SQC name equal to *CCLTRWOL*.

Without having this specific SQC name, the Letter Generation SQR process (CCLTRGEN) does not extract the user IDs and the passwords to print on the letters. To facilitate printing letters with the user IDs and passwords, you can use the delivered template called CCLTROPR.doc. To use this template, create a letter code called *OPR*. You must also create a communication speed key (also called a comm key) and an event ID.

---

**Warning!** Do not modify the SQC named CCLTRWOL.sqr in any way.

---

The User Profiles Management process enables you to assign more than one communication. For example, if you are creating user profiles for the prospects for next term, you can create an event ID with different comm keys. One might include a letter code for a letter communicating user IDs and passwords, a second might be for a postcard for an invitation to an open house, and a third might be for an admission package.

---

**Warning!** The User Profiles Management process assigns communications *only* to individuals with a user profile created by the process.

---

### See Also

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Communications"

Chapter 19, "Creating and Maintaining User Profiles," Generating Password Notification Letters, page 368

## Setting Up Checklists

To assign a checklist code to self-service users, you must create checklist items and a checklist code, and you must add the checklist to the event ID. A checklist could be used for the users' list of things to do.

---

**Warning!** The User Profiles Management process assigns checklists only to the individuals who have a user profile created by the process.

---

**See Also**

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Communications"

## Setting Up Comments

You can assign a comment to the self-service users. For example, you might need to know whether an individual's user profile was created by the User Profiles Management process. You could create this comment: this individual's user ID was created by the User Profiles Management process. To do this, you create a comment category and add it to the event ID.

---

**Warning!** The User Profiles Management process assigns comments only to the individuals who have a user profile that is created by the process.

---

**See Also**

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Comments"

---

## Setting Up User Profiles Management

To set up user profiles, use the User Profiles Mass Creation component (OPER\_LOAD).

The User Profiles Mass Creation component is the setup component for the User Profiles Management process. When you access the component, select a role name. That role is added to user profiles or deleted from existing user profiles, depending on the processes you select when you run the User Profiles Management process.

On the first page of the component, select the mass change that you want to use to select a group of individuals. You select individuals whose role you want to add or delete in new or existing user profiles. You can then review the list of these individuals whose user profiles you plan to create or modify. The individuals appear in a search results grid at the bottom of the page after you run the mass change. The list provides a count of the number of IDs selected. On the first page, you also determine how the user ID and passwords are created. You can also assign 3C items and create a result table, which is a temporary table that holds the new user IDs and their nonencrypted passwords.

On the second page of the component, you select the user preferences (default values) to assign to the user IDs. You also set IDs to use the online credit card functionality.

This section discusses how to:

- Select users.
- Assign user preferences.

## Pages Used to Set Up User Profiles Management

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
User Profiles Mass Creation	OPER_ROLE_DEFN	Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation, User Profiles Mass Creation	Select the users to manage (using a mass change definition) and define other parameters, including the algorithms for creating user IDs and passwords and the model user ID. You can also assign 3C IDs to the user ID that you create.
Assign User Preferences	OPER_ROLE_DEFN_ASS	Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation, Assign User Preferences	Select user preference default values for institution, academic career, term, and aid year. You can also set up the values for institution set and business unit if the institution uses the online credit card process.

## Selecting Users

Access the User Profiles Mass Creation page (Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation, User Profiles Mass Creation).

**User Profiles Mass Creation**
Assign User Preferences

**Role Name:** PeopleSoft User

**\*Mass Change**  [Mass Change Definition](#) Populate Selection

**Definition:**

**Count:** 866 Refresh Grid

**User ID**

**\*User ID Model:**  [PS] Peoplesoft Superuser

**Email Type:**

**User Profile Email Type:**

**\*ID Type:**

**Algorithms**

**\*For User IDs:**

**\*For Passwords:**

**Email Type:**

**Communicate User IDs and Passwords**

**Assign 3C** **Institution:**

**Event ID:**

**Create result table**

User Profiles Mass Creation page (1 of 2)

Selection Results						
ID	Name	User ID	Institution Set	Institution Set Override	Business Unit	
1 AA0012	Kim,Sandra D	SSS_AA0012				
2 AA0012	Kim,Sandra D	SSS_STUDENT	PSUNV			
3 AA0034	Grant,Shelby	SSS_AA0034				
4 AA0037	Greene,Ronald	SSS_AA0037				
5 AD1000	Roberts,John					
6 AD1001	James,Heather					

User Profiles Mass Creation page (2 of 2)

Enter the mass change that the system uses to create the list of users to process. Click the Mass Change Definition link to access the Mass Change Definition component, where you can select different parameters for the mass change selection.

**Note.** It is good practice to always regenerate a mass change prior to using it, even if you didn't modify the criteria. That way, you ensure that you are using the latest data.

**Count** Displays the number of users selected by the mass change. This field is populated after you click the Populate Selection button.

**Populate Selection** Click to run the selected mass change. The Selection Results grid displays a list of person IDs when the mass change processing is complete. Generate the mass change each time that you create user profiles. That way, you ensure that you are using the latest data.

**Refresh Grid** Click to delete the mass change results from the buffer and from the Search Results table. If you do not refresh the grid after you use it, it may take a while to open this page the next time that you access it.

### ***User ID***

The fields in this area are used as the basis for the new user profiles.

**User ID** Enter the user ID that you want to use as the model for the user profiles. For example enter the SCC\_MODEL user ID.

**Email Type** Select the email type to enter in the user profile. The system uses the EMAIL\_ADDRESSES record to determine the email address, based on the type that you enter. The email address (for the IDs that have one) is added in. the Email Addresses page of the User Profiles component (PeopleTools, Maintain Security, Use, User Profiles, Edit Email Addresses link). If the user does not have an email address of the selected type, no email address is added to the user profile.

If you select *Preferred*, the system uses the email address marked as the preferred address on the Electronic Addresses page.

---

**Note.** If you select a value for Email Type, you are required to enter an equivalent value in the User Profile Email Type field, and vice versa.

---

**User Profile Email Type** Because the user profile stores different Email Type values than the ones used throughout the applications, select the corresponding email type that will match the type previously selected. Values are: *Blackberry, Business, Home, Other,* and *Work*. These values are delivered with the system as translate values and should not be modified.

**ID Type** By default, the system uses the value *Employee*. You can run the User Profiles Management process only for that ID type.

### ***Algorithms***

Enter the algorithms for the system to use when creating new user IDs and passwords.

**For User IDs** Select *ID* or *Email* to indicate which value to use to create the user IDs for the selected users.

If you select *ID*, the new user ID is the same as the ID.

If you select *Email*, you must select the Email Type For User ID to be used.

**For Passwords**

Select to indicate how the system creates the new passwords for the new user IDs.

Select *First Name, Last Name, ID* to create passwords using the first two characters of the first name plus the first two characters of the last name plus the ID, if the ID is four characters or less. If the ID has more than four characters, the last four characters of the ID are used.

Enter *Random Creation* to create more secure passwords. The random password is created by using the 26 letters of the alphabet and numbers from 1 to 9.

The length of the password is determined by the Minimum Password Length field on the Password Controls page (PeopleTools, Maintain Security, Setup). If the value in this field is less than 8, then a password length of eight characters is used.

If the Required Number of Specials field on the Password Controls page is set to a value other than 0, then the same number of special characters (that is, @, #, \$, %, ^, &, \*, ~, !, ?) is randomly picked and appended to the end of the password.

**Email Type**

Select the email type to use. If you select *Preferred*, the system uses the email address marked as the preferred address on the Electronic Addresses page. The new user IDs are the characters before the @ symbol, excluding spaces and special characters.

---

**Important!** If you select *Email* in the For User IDs field and the user does not have the email type that you select, a user profile is *not* created for the user. Instead, an error row is added to the temporary table (PS\_ERR\_LOG\_USRPRF) with the error code 4.

---

**Communicate User IDs and Passwords****Assign 3C**

Select to assign communications, checklists, or comments to the user IDs that the process creates. If you select this check box, select a 3C engine event ID that the system uses to determine which communications, checklists, and comments to assign. Any communications, checklists, or comments should be created in *one* event ID.

You can use this field to assign a communication that tells new users their user IDs and passwords for an internet site.

When the User Profiles Management process runs with the Create User Profiles option and the Assign 3C option selected, the system invokes the 3C engine. 3C engine adds communications, checklists and comments directly to the communication tables, checklist tables, and comments tables, respectively. Consequently, all new users automatically receive the communications, checklists, and comments that are assigned.

**Institution**

Select the institution associated with the event ID. This information is needed for the 3C engine.



**Event ID**

Select the event ID that you created to assign communications, checklists, and comments. This information is needed for the 3C engine.

See [Chapter 19, "Creating and Maintaining User Profiles," Generating Password Notification Letters, page 368.](#)

**Create result table**

When this check box is selected, a temporary result table is created when you run the User Profiles Management process. This temporary table is the *only* place where the newly created passwords appear nonencrypted. If you do not select this check box, the passwords cannot be seen and therefore cannot be communicated to the new self-service users.

---

**Note.** The check box is automatically selected at save time if you select the Assigned 3C option using an event ID that has been set up with a comm key that includes a letter code with the unique SQC CCLTRWOL. The Letter Generation process uses the temporary table to print the user IDs and the passwords on the letters.

---

See *Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table* on My Oracle Support, ID 751540.1.

**Selection Results**

Click the Populate Selection button to populate this area.

**ID**

Displays the list of person IDs that match the criteria specified in the selected mass change. If an ID is listed multiple times, more than one user ID was previously created for the same ID.

---

**Note.** The User Profiles Management process does not create a user ID for the person IDs that already have a user ID. If you see in the grid that a person ID has multiple user IDs, it is because an administrative user manually created them.

---

**Name**

Displays the name associated with the person ID.

**User ID**

Displays the user ID assigned to the person ID. This information enables you to determine which IDs have a user ID versus the ones who do not. The User Profiles Management Application Engine process (USERPROFILE) creates a user ID for the one that do not have one.

---

**Note.** If a user ID already exists, the process *does not* create a new one.

---

**Institution Set**

Displays the institution set assigned to a user ID by the Assign User Preferences Application Engine process. This value is mostly used by the online credit card process.

If a user ID already has an institution set associated with it, the institution set is overridden by the Assign User Preferences process if the value that you select on the Assign User Preferences page is different from the user ID's institution set. However, if an administrator has manually entered an institution set, the process does not change the manually entered institution set.

**Institution Set Override**

Displays the institution set entered on the Self Service Institution Set Override page. The background process *does not* override this value.

See [Chapter 17, "Securing Student Financials," page 319.](#)

**Business Unit**

Displays the business unit assigned to a user ID by the Assign User Preferences process. This value is used by the online credit card process.

If a user ID already has a business unit associated with it, the business unit is overridden by the Assign User Preferences process if the value that you select on the Assign User Preferences page is different from the user ID's business unit.

**See Also**

*PeopleTools PeopleBook: Security Administration, "User Profiles"*

## Assigning User Preferences

Access the Assign User Preferences page (Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation, Assign User Preferences).

The screenshot shows the 'Assign User Preferences' page. At the top, there are two tabs: 'User Profiles Mass Creation' and 'Assign User Preferences'. Below the tabs, the following information is displayed:

- Role Name:** CS - Student Applicant
- Mass Change:** Userprofile - Applicant
- Definition:**
- Assign Default Values for User IDs** (Section Header)
- Institution:** PeopleSoft University (dropdown)
- Institution Set:** PeopleSoft University (dropdown)
- Academic Career:** Undergraduate (dropdown)
- Business Unit:** PSUNV Budget Office (dropdown)
- Aid Year:** 2005 (text input with search icon)
- Term:** 0405 (text input with search icon)

Assign User Preferences page

The values that you select on this page override the values created for the user ID in the OPR\_DEF\_TBL\_CS table.

### **Assign Default Values for User IDs**

**Institution, Academic Career, Aid Year, and Term** These fields are used as user preferences when the user accesses pages that include these fields.

**Institution Set** This value is used by Student Financials. Enter a value if you use online credit card processing.

**Business Unit** This value is used by Student Financials. Enter a value if you use online credit card processing.

### **See Also**

[Chapter 17, "Securing Student Financials," Setting Security for Credit Cards, page 335](#)

## **Running the User Profiles Management Processes**

To set up user profile management, use the User Profiles Management component (RUN\_CC\_USERPROFILE).

Before running the User Profiles Management process, regenerate the mass change that you plan to use.

The User Profiles Management process consists of a series of mass changes templates and definitions, as well as a series of application engine programs.

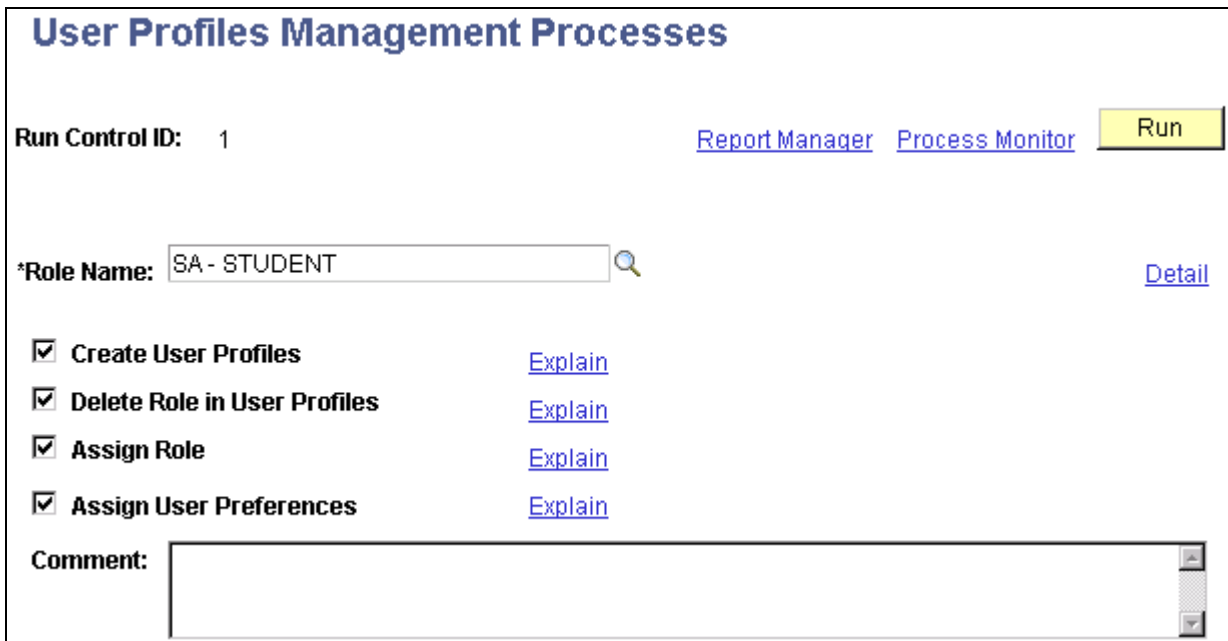
This section discusses how to run the processes that are part of User Profiles Management process.

### **Page Used to Run the User Profiles Management Processes**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
User Profiles Management Processes	RUNCNT_USERPROFILE	Set Up SACR, Security, Secure Student Administration, Process, User Profiles Management, User Profiles Management Processes	Run any of the four user profile processes. You can create user profiles, delete or assign a role to user profiles, and assign user preferences.

### **Running the User Profiles Management Process**

Access the User Profiles Management Processes page (Set Up SACR, Security, Secure Student Administration, Process, User Profiles Management, User Profiles Management Processes).



User Profiles Management Processes page

**Role Name** Enter the name of the role to create or maintain. The available options correspond to the roles for which you set up a mass change on the User Profile Mass Creation page.

**Detail** Click to access the User Profiles Mass Creation page, where you can review and modify the setup before running the processes.

The four check boxes represent the four processes that you can run when you run the USERPROFILE Application Engine process. You can select one or more of these check boxes.

**Create User Profiles** Select to create a user profile for the IDs that are selected by the mass change (if they do not already have user IDs). The role that you selected is also added to the new user IDs. The user IDs and the passwords are based on the algorithms that you select on the User Profiles Mass Creation setup page.

When this check box is selected, the User Profiles Management process creates a temporary table to list all the user IDs that are created. This temporary table is called PS\_USRPRF\_NWID\_TMP.

If on the User Profiles Mass Creation setup page you select to create the result table, this process creates the temporary table.

See *Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table* on My Oracle Support, ID 751540.1.

<b>Delete Role in User Profiles</b>	<p>Select to delete the role from the user IDs that are <i>not</i> selected by the mass change. This option deletes the role name on the user profiles that no longer meet the criteria for the specified role name.</p> <p>For example, to provide self-service access to the applicants of the current term, this function deletes the Applicant role for all the user profiles that have the role but are not part of the current term.</p> <p>When this process runs, it creates a temporary table so you can review the IDs for which the specified role is removed. The temporary table is called PS_USRPRF_DEL_TMP.</p>
<b>Assign Role</b>	<p>Select to assign the role to the existing user IDs that are selected by the mass change.</p> <p>This process creates a temporary table called PS_USRPRF_ASG_TMP. It lists the user IDs that have the role assigned to them.</p> <hr/> <p><b>Note.</b> This is the same process that you can run from the Dynamic Members page in the PeopleTools, Security, User Profiles, User Profiles, Roles component. If you assign roles using that component, be sure the query that you use has the same criteria as the mass change.</p> <hr/> <p>See <a href="#">Chapter 19, "Creating and Maintaining User Profiles," Delivered Mass Changes for User Profiles Management, page 352.</a></p>
<b>Assign User Preferences</b>	<p>Select to assign the user preferences from the Assign User Preferences page. These user preferences are assigned to all user IDs selected by the mass change. If a user ID already has a value set for the preferences, it is overridden by this process (unless a value is added to the institution set override).</p> <p>If you are using online credit card processing, you should select this process to assign a business unit and an institution set to the user IDs.</p> <p>The process creates a temporary table called PS_ASSN_SETVAL_TMP. Use this table to review the IDs that have the user preferences assigned to them.</p>
<b>Comment</b>	<p>Enter any comments about the selections. The selected settings are associated with the user ID and the run control ID, so when you use the same settings, you can see the comments. This field is for informational purposes only.</p>
<b>Explain</b>	<p>Click these links to view the explanation for the selected check box.</p>
<b>Run</b>	<p>Click to run the User Profiles Management Application Engine process (USERPROFILE). When you run this process, do not select a type or a format on the Process Scheduler page.</p>

### **Error Log Information**

An error log (PS\_ERR\_LOG\_USRPRF) is created by the User Profiles Management process that lists any IDs for which a user profile is not created. Review the error log after running any of the processes. In the error log these error codes are used:

- 1 In the Assign Role Application Engine process, the save method was not completed for the existing user ID. The system also assigns this error code if it encounters an invalid user ID. A valid user ID must meet these conditions:
  - Has no space.
  - Has no comma.
  - Is not equal to PPLSOFT.
  - Is not longer than 30 characters.
- 2 In the Create User Profile Application Engine process, the save method was not completed for the newly created user ID.
- 3 In the Create User Profile process, the newly created user ID cannot be saved because the user ID already exists.
- 4 In the Create User Profile process, no user ID can be created because *Email* was selected in the For User IDs field on the User Profiles Mass Creation page.
- 5 In the Delete Role Application Engine process, the save method was not completed for the existing user ID.

After you run the process, you can access the User Profiles Mass Creation page Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation for the role you just ran and click the Populate Selection button to see which user IDs were created. You can also see which business unit and institution set were assigned, if any where defined. In addition, you can review the temporary tables that are created by the processes.

#### **See Also**

*PeopleTools PeopleBook: PeopleSoft Applications User's Guide, "Working with Processes and Reports"*

---

## **Generating Password Notification Letters**

You can create letters to send notifications to new users whose IDs are created by the User Profiles Management process. You can notify them of their assigned user ID and password using the Letter Generation process.

---

**Note.** This section refers to the temporary result table, which includes sensitive information including user IDs and passwords. For security reasons, this PeopleBook does not explain how the temporary result table functions.

---

This section discusses how to:

- Set up password notification letters.
- Run the letter generation process for password notification letters.

### See Also

*Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table* on My Oracle Support, ID 751540.1.

## Pages Used to Generate Password Notification Letters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
User Profiles Mass Creation	OPER_ROLE_DEFN	Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation, User Profiles Mass Creation	Select the users to manage (using a mass change definition) and define other parameters, including the algorithms for creating user IDs and passwords and the model user ID. You can also assign 3C IDs to the user ID that you create.
Letter Generation - General Parameters	RUNCTL_LTRGEN1	Campus Community, Communications, Letter Generation, General Parameters	Run the process that generates password notification letters.

## Setting Up the Password Notification Letters

Access the User Profiles Mass Creation page (Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation, User Profiles Mass Creation).

To set up information for notification letters and use the Letter Generation process, you must enter the appropriate event ID and institution on this page. When the User Profiles Management process runs with the *Create User Profiles* option selected, it invokes the 3C engine. The 3C engine adds communications directly to the communications table, so all of the new users that are created have a communication assigned to their records.

To create password notification letters, the event ID must include a comm key that has been defined with a letter code. You set up the letter code with the function equal to *General* and the SQC name equal to *CCLTRWOL*. Complete this setup on the Standard Letters page.

---

**Warning!** Do not modify the SQC named CCLTRWOL.sqr in any way.

When the event ID includes a letter code with the SQC equal to *CCLTRWOL*, the same process creates a temporary result table where all of the new user IDs and passwords are stored. The Letter Generation process reads this table to extract the passwords and the use IDs.

---

### See Also

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Communications"

*Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table* on My Oracle Support, ID 751540.1.

## Running the Letter Generation Process (CCLTRGEN) for Password Notification Letters

After you have run the Create User Profiles process, you can run the Letter Generation process to extract the data. To run letter generation access the Letter Generation – General Parameters page (Campus Community, Communications, Letter Generation, General Parameters).

When you run the Letter Generation process for password notification letters, the system updates the temporary result table with a flag indicating that the data has been extracted and the rows can be deleted from the temporary table. After the temporary table has been cleaned up, a critical error occurs if you attempt to run a communication for password notification letters for those user IDs and passwords.

---

**Note.** When running the Letter Generation process for notification letters, make sure both the Produce Communication and Complete Communication check boxes are cleared in the Missing Critical Data group box. If these check boxes are cleared, the system does not extract and complete a communication if critical data (for example, address information) is missing. Consequently, you can add or correct the missing data for the individual ID specified in the log. You can then rerun the Letter Generation process. If you do not rerun the communications, be sure to use the User Profile Clean Up Processes page to delete the rows from the results temporary table, even though the Letter Generation process did not set the ready-to-delete flag. If you run the process with these check boxes selected, the system creates the communication despite the missing data and updates the temporary result table with the flag to indicate that these rows can be deleted.

---

**Warning!** When the letter generation process extracts the data, it creates a .DAT file (CCLTRGEN.DAT ) and two .CSV files (CCLTR<LETTERCODE>.CSV for letters and CCLBL<LETTERCODE>.CSV for labels). These files are either stored on the temporary directory of the PeopleSoft Process Scheduler server or on the computer where the extract file path has been redirected. (You redirect the extract on the Date/Merge Parameters page of the Letter Generation component.) The passwords in the data extracts are unencrypted. No process automatically deletes the extracts. They are available for running future communications. To prevent misuse, the institution should take the appropriate security measures. For example, be sure to write the extract to a secure directory, verifying that the CCLTRGEN macro points to the same directory. Then manually delete the data extract after you have performed the merge with the letter template.

---

The extract file (CCLTR<LETTERCODE>.CSV files) that includes the nonencrypted passwords is overridden every time you run the Letter Generation process for the letter code that you set up to run the password notification letters. If you do not plan to run the macro to perform the merge with the data extract and the letter template right away, save the files using a different name. Make sure that they are stored in a secure folder and that they are deleted after the communication is produced.



The PeopleSoft system comes with these items specifically for generating the notification letters:

- A sample Microsoft Word template called CCLTROPR.doc for printing notification letters.

You can modify the template or use it to create new templates so that you can create different letters. If you use this template and you do not rename it, the letter code that you create must be named OPR.

- A unique SQC called CCLTRWOL.

The CCLTRWOL SQC generates the variable data necessary for the password notification letters associated with the letter code that you create. You should not modify this SQC.

### **Example**

Here is an example of a password notification letter created with the sample template CCLTROPR.doc:

July 23, 2001  
 Janice Diller  
 44125 Ventura Blvd.  
 Encino, CA 91465

Dear Janice,

Welcome to PeopleSoft University Online! Through the PSU Online site you'll be able to take care of most of your business with the university.

To access your information, you will need the following information:  
**User ID:** WSR6002  
**Password:** EUR2J54A

**You are urged to keep this information private** – anyone with this information will be able to access your account! Your initial word has been system generated; we recommend that you change it after you login the first time.

What you can do at PeopleSoft University's site depends on the profile we have for you in our records. If you think this is incorrect or incomplete, or if you have any other problems using PeopleSoft University on the web, please contact the computer Services Division at (313) 555-1234.

Registrar

Example of password notification letter

---

**Warning!** When you merge the letter template with the extract files, a copy of the letter is saved on the local drive of the computer that was used to merge and print the letters. Be sure to delete these local copies because they contain the nonencrypted passwords.

---

## **Resolving Issues for the User Profiles Management Process**

This section discusses techniques that enable you to run the User Profiles Management process successfully. If you receive an error or if a process runs unsuccessfully, try these problem solving techniques.

## Mass Changes That Select No IDs

If the Count field on the user Profiles Mass Creation page displays 0 after you click the Populate Selection button, then the system selected no IDs for the process; the process ran successfully, but no IDs were created or maintained. In this case, regenerate the mass change using the mass change definition on the Generate SQL page. Be sure to save the mass change. Run the process again. If the count still shows zero, then the criteria may not match any of the data in the database.

## Processes That End Abnormally

If a process abnormally ended, the next time you run it may be unsuccessful because of the data stored in these temporary tables:

- PS\_ENG\_COMM\_TMP
- PS\_EMPLID\_GRP\_TMP

In this case, delete the tables and run the process again.

## User IDs Not Created

If no user ID was created for an ID that was selected by the mass change, look at the error log PS\_ERR\_LOG\_USRPRF and verify if an error code was given. Error codes are documented inside the "Error Log Information" section of this chapter.

### **See Also**

Chapter 19, "Creating and Maintaining User Profiles," Running the User Profiles Management Process, page 365

## Chapter 20

# Using Mass Change

This chapter provides an overview of mass change in Campus Solutions and discusses how to:

- Process mass changes.
- Set up mass change security.
- Define specific parameters for mass change definitions.

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## Understanding Mass Change in Campus Solutions

Campus Solutions provides many tools to process information. However, because much of what you do is unique to the institution, the application enables you to create your own unique processes. One way of performing this task is to create mass changes. For communications, checklists, and comments you can also use Campus Community's 3C engine.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine."

The PeopleSoft Mass Change utility is a SQL generator that you use to perform high-volume business transactions, such as updating data for multiple students without accessing each student record online. Its function is similar to PeopleSoft Query, but while PeopleSoft Query retrieves data from the database, the PeopleSoft Mass Change utility makes changes to the database.

The PeopleSoft Mass Change utility is commonly used for these tasks:

- Performing high-volume, set-oriented transactions.
- Copying data from table to table.
- Archiving table data.
- Performing transactions not normally supported through the pages.

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**Note.** The mass change types and templates delivered with Campus Solutions should serve as examples for your particular needs. The functionality provided is representative of common business practices; however, you may need to modify the delivered mass change types and templates to fit your specific requirements.

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Mass change is a way of breaking down statements that alter data (such as update, insert, and delete statements) into a hierarchy of three components: types, templates, and definitions. The end user only needs to alter the simplest level to change the parameters used in a particular run. The PeopleSoft Mass Change utility includes these three components:

1. *Types* are the lowest level components.

A mass change type defines the type of SQL statements to be generated, the records involved, and the sequence in which they run. Application developers familiar with SQL and the database design typically define mass change types.

2. *Templates* are built upon mass change types.

Mass change templates are used to specify which fields make up the WHERE clause of the SQL statement and which fields can be hard-coded with a particular value. Application developers typically define mass change templates.

3. *Definitions* are built upon mass change templates and are generally created and run by end users.

Mass change definitions are used to specify the values and operators for each field in the statement's WHERE clause and default fields and to generate the actual SQL statement.

You can run mass change definitions individually or combine them into mass change groups and run them together.

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**Note.** Anyone who defines mass change types or templates should have both a solid understanding of SQL and an extensive knowledge of the PeopleSoft database in question.

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### **See Also**

*PeopleTools PeopleBook: Data Management, "Mass Change"*

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## **Processing Mass Changes**

Processing mass changes consists of a definition phase and a processing phase. First, you define the selection criteria and changes for the selected data; then you run the Structured Query Reports (SQRs) that process the changes you defined.

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**Note.** The development staff must create mass change types and templates before you can use the mass change definitions discussed in this section.

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This section discusses how to:

- Define a mass change.
- Process a mass change.

## Pages Used for Processing Mass Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Description	MC_DEFN_00	<ul style="list-style-type: none"> <li>• Checklists, Mass Change - Checklists, Mass Change Definition, Description</li> <li>• Communications, Mass Change - Communications, Mass Change Definition, Description</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Description</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Description</li> <li>• Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Description</li> </ul>	Define the mass change.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Criteria and Defaults	MC_DEFN_01	<ul style="list-style-type: none"> <li>• Checklists, Mass Change - Checklists, Mass Change Definition, Criteria and Defaults</li> <li>• Communications, Mass Change - Communications, Mass Change Definition, Criteria and Defaults</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Criteria and Defaults</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Criteria and Defaults</li> <li>• Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Criteria and Defaults</li> </ul>	Define criteria and set defaults for mass changes.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Student Administration	MC_DEFN_SA	<ul style="list-style-type: none"> <li>• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Student Administration</li> <li>• Campus Community, Communications, Mass Change - Communications, Mass Change Definition, Student Administration</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Student Administration</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Student Administration</li> <li>• Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Student Administration</li> </ul>	Set specific parameters for mass change definitions. The resulting mass change SQL statements will include these parameters.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Generate SQL	MC_DEFN_02	<ul style="list-style-type: none"> <li>• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Generate SQL</li> <li>• Campus Community, Communications, Mass Change - Communications, Mass Change Definition, General SQL</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Generate SQL</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Definition, General SQL</li> <li>• Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Generate SQL</li> </ul>	Generate the SQL to run a mass change.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Execution History	MC_DEFN_03	<ul style="list-style-type: none"> <li>• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Execution History</li> <li>• Campus Community, Communications, Mass Change - Communications, Mass Change Definition, Execution History</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Execution History</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Execution History</li> <li>• Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Execution History</li> </ul>	View the history of a completed mass change.
Group Definition	MC_GROUP_01	<ul style="list-style-type: none"> <li>• Campus Community, Checklists, Mass Change - Checklists, Mass Change Group</li> <li>• Campus Community, Communications, Mass Change - Communications, Mass Change Group</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Group</li> </ul>	Combine mass change definitions into a group and set the execution sequence.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Run Mass Change	RUN_MASSCHNG	<ul style="list-style-type: none"> <li>• Campus Community, Checklists, Mass Change - Checklists, Mass Change Group</li> <li>• Campus Community, Communications, Mass Change - Communications, Mass Change Group</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Run Mass Change</li> <li>• Student Admissions, Processing Applications, Mass Change, Run Mass Change</li> </ul>	Execute the mass change.
Mass Change Result	MC_CHK_RESULT	<ul style="list-style-type: none"> <li>• Campus Community, Checklists, Mass Change - Checklists, Mass Change Group</li> <li>• Campus Community, Communications, Mass Change - Communications, Mass Change Group</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Group</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Group</li> </ul>	View mass change results.

## Defining the Mass Change

The definition phase comprises these steps:

1. Select a mass change template, and use it to create a mass change definition.
2. Outline the criteria for selecting rows, and identify the columns and values to be changed.

3. Generate the SQL statement.

## Processing the Mass Change

The processing phase comprises these steps:

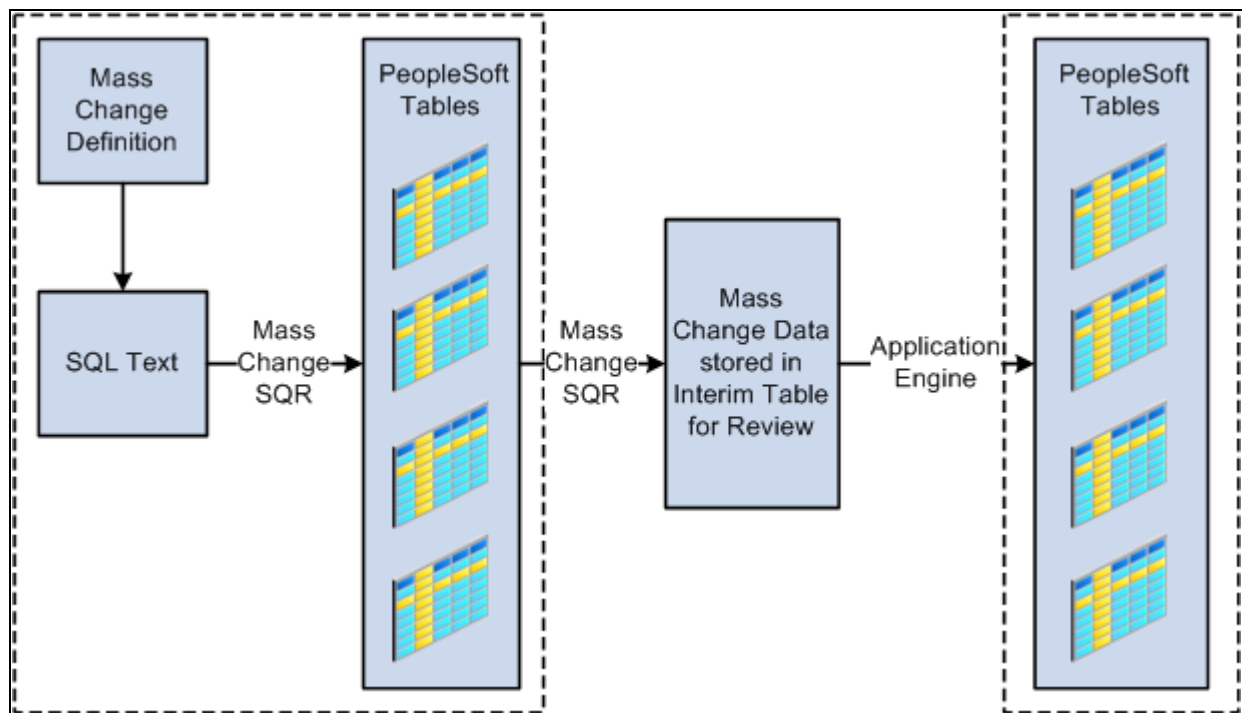
1. Run the Mass Change SQR to select, change, and transfer the data to temporary tables.
2. (Optional) Review the data for accuracy (recommended).

This PeopleSoft application delivers features that enable you to review the mass change results. You can view the results of mass change definitions using the Mass Change Result page (one of the locations is Campus Community, Communications, Mass Change - Communications, Mass Change Results). Other Campus Solutions applications also have pages for reviewing mass change results; these pages are described in the PeopleBook for the specific application.

3. Run the appropriate process to load the data from temporary tables into PeopleSoft tables (if applicable).

For example, to insert communications or checklists, you run the 3C Engine process to insert the mass change results into the PeopleSoft tables.

This flowchart illustrates mass change integration:



Mass change in Campus Solutions

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## Setting Up Mass Change Security

Before using the PeopleSoft Mass Change utility for the first time, you should consider who in the organization should be authorized to use mass change templates and run mass changes. Because the PeopleSoft Mass Change utility is a powerful tool with the ability to modify large portions of the data, you should carefully consider mass change security.

Mass change security governs whether users assigned to a particular permission list can run mass changes online, the templates available to a user, and what mass changes the user can run. To set Mass Change security, go to PeopleTools, Security, Permissions & Roles, Permission Lists, Mass Change.

### **See Also**

*PeopleTools PeopleBook: Data Management, "Mass Change"*

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## Defining Specific Parameters for Mass Change Definitions

The Student Administration page in the Mass Change Definition component enables you to specify additional parameters that are used only in Campus Solutions.

## Page Used to Define Specific Parameters for Mass Change Definitions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Administration	MC_DEFN_SA	<ul style="list-style-type: none"> <li>• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Student Administration</li> <li>• Campus Community, Communications, Mass Change - Communications, Mass Change Definition, Student Administration</li> <li>• Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Student Administration</li> <li>• Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Student Administration</li> <li>• Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Student Administration</li> </ul>	Set specific parameters for the mass change definitions. The resulting mass change SQL statements include these parameters.

### Setting Specific Parameters for Mass Change Definitions

Access the Student Administration page (Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Student Administration).

Description	Student Administration	Criteria and Defaults	Generate SQL	Execution History
<b>Mass Change Definition:</b>		Application Prog Update Select		
<b>Additional Parameters</b>				
<b>*Mass Change Default Status:</b>	<input type="text" value="Pending"/>			
<b>*As Of Date:</b>	<input type="text" value="07/22/2004"/>	<b>*As of Date/Time:</b>	<input type="text" value="07/22/2004 3:09:59PM"/>	
<b>Begin Time:</b>	<input type="text"/>	<b>End Time:</b>	<input type="text"/>	
<b>Aid Year:</b>	<input type="text" value="1998"/>	Financial Aid Year 1997-1998		
<b>Academic Career:</b>	<input type="text" value="UGRD"/>	Undergraduate		
<b>SetID:</b>	<input type="text" value="PSUNV"/>	Peoplesoft University		
<b>Academic Institution:</b>	<input type="text" value="PeopleSoft University"/>			
<b>Stdnt Fin Business Unit:</b>	<input type="text"/>			
<b>Comments:</b>	<input type="text"/>			

Student Administration page

### ***Additional Parameters***

**Mass Change Default Status** This field is not used by Campus Solutions.

This field value sets the status value of all mass change records created when you run this mass change definition. The default status is used with mass change definitions run using database agents. Campus Solutions mass change definitions are not delivered to use database agents.

**As Of Date**

The current date appears by default. The value for this field must be the current date for the mass change definition to run. This field is used as a default date in certain mass change definitions.

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**Note.** Even if the date defaults to today's date, you must regenerate and save the mass change definition before using it. This way it will select the people in the database that meet the criteria as of today. If not it will use the last date you generated and saved the mass change definition.

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**As of Date/Time**

The current date and time appears by default when you access the page. The value for this field must be the current date and time for the mass change to run. If you make a change to the mass change definition, you must save it before you run it.

**Begin Time and End Time** Not currently used.

**Aid Year, Academic Career, SetID, Academic Institution and Stdnt Fin Business Unit** (student financials business unit) Enter values to be used as defaults by the mass change definition. These values are also used for prompting on the Criteria and Defaults page.

**Comments** Enter any comments about this mass change definition.

### **See Also**

*PeopleTools PeopleBook: Data Management, "Mass Change"*





## Chapter 21

# Setting User Defaults

This chapter discusses how to:

- Enter user defaults.
- Define Contributor Relations user defaults.

### **See Also**

*PeopleTools PeopleBook: Security Administration, "User Profiles"*

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## Entering User Defaults

To set up user defaults, use the User Defaults component (RUN\_CC\_USERPROFILE).

The system automatically loads default values into data pages for a particular user ID. The user default settings that you establish in the User Defaults component can be overridden on any page in the system. User defaults (which are optional) can save time and minimize data entry errors.

You need to be familiar with the pages and fields that default settings affect before you specify defaults. This chapter does not describe the functionality of the particular fields discussed here. Those fields are documented in the relevant application PeopleBooks.

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**Note.** When you select default values for fields, you can select only those values for which the user ID has security access.

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This section discusses how to:

- Set defaults for academic information.
- Set defaults for financial and admissions data.
- Set defaults for admissions application data.
- Set defaults for printing transcripts, award notifications, and Student and Exchange Visitor Information System (SEVIS).
- Set defaults for enrollment overrides.
- Set defaults for communication keys.
- Select the type of communication, checklist, and comment (3C) group access.

## Pages Used to Enter User Defaults

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
User Defaults 1	OPR_DEF_TABLE_CS1	Set Up SACR, User Defaults, User Defaults 1	Set defaults for the Academic Institution field, Term field, Career field, Academic Program field, and other fields.
User Defaults 2	OPR_DEF_TABLE_CS2	Set Up SACR, User Defaults, User Defaults 2	Set defaults for the setID field, Aid Year field, Application Center field, Cashier's Office field, and other fields.
User Defaults 3	OPR_DEF_TABLE_CS5	Set Up SACR, User Defaults, User Defaults 3	Set defaults for admissions application data.
User Defaults 4	OPR_DEF_TABLE_CS4	Set Up SACR, User Defaults, User Defaults 4	Set defaults for printing transcripts, including transcript output destination and transcript type, SEVIS processing, and award-notification printing.
Enrollment Override Defaults	OPR_DEF_TABLE_CS3	Set Up SACR, User Defaults, Enrollment Override Defaults	Set default enrollment overrides for a specified user ID.
Communication Speed Keys	OPR_SPDKEY_FUNC	Set Up SACR, User Defaults, Communication Speed Keys	Set default values for communication keys for a particular user ID.
User 3C Groups Summary	OPR_GRP_3C_SUM	Set Up SACR, User Defaults, User 3C Groups Summary	Select the type of 3C group access by specifying inquiry or update access for data in 3C groups.

## Setting Defaults for Academic Information

Access the User Defaults 1 page (Set Up SACR, User Defaults, User Defaults 1).

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
<b>User ID:</b>	PS	<b>Name:</b>	Locherty,Betty	
<b>Academic Institution:</b>	<input type="text" value="PSUNV"/>		PeopleSoft University	
<b>Career Group SetID:</b>	<input type="text" value="PSUNV"/>		Peoplesoft University	
<b>Facility Group SetID:</b>	<input type="text" value="PSUNV"/>		Peoplesoft University	
<b>Academic Career:</b>	<input type="text" value="UGRD"/>		Undergraduate	
<b>Academic Group:</b>	<input type="text" value="LBART"/>		College of Liberal Arts	
<b>Subject Area:</b>	<input type="text" value="ENGLLIT"/>		English Literature	
<b>Term:</b>	<input type="text" value="0505"/>		2003 Fall	
<b>Academic Program:</b>	<input type="text" value="LAU"/>		Liberal Arts Undergraduate	
<b>Academic Plan:</b>	<input type="text" value="ENGL-BA"/>		English (BA)	
<b>Academic Sub-Plan:</b>	<input type="text"/>			

User Defaults 1 page

Enter the default values for fields on this page. You can set default values for some fields but not others. All fields are optional.

### See Also

*PeopleSoft Student Records PeopleBook*

## Setting Defaults for Financial and Admissions Data

Access the User Defaults 2 page (Set Up SACR, User Defaults, User Defaults 2).

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
<b>User ID:</b>	PS	<b>Name:</b>	Locherty,Betty	
<b>SetID:</b>	<input type="text" value="PSUNV"/>		Peoplesoft University	
<b>Aid Year:</b>	<input type="text" value="2004"/>		Financial Aid Year 2003-2004	
<b>Business Unit:</b>	<input type="text" value="PSUNV"/>		PeopleSoft University Bursar	
<b>Application Center:</b>	<input type="text" value="UGRD"/>		Undergraduate	
<b>Recruiting Center:</b>	<input type="text" value="UGRD"/>		Undergraduate	
<b>Cashier's Office:</b>	<input type="text" value="MAIN"/>		Main Cashiering Office-7.5 Int	
<b>Department:</b>	<input type="text"/>			
<b>Admit Type:</b>	<input type="text"/>			
<b>Campus:</b>	<input type="text" value="MAIN"/>		Main Hacienda Campus	
<b>Institution Set:</b>	<input type="text" value="PSUNV"/>		PeopleSoft University	

User Defaults 2 page

Enter default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

## Setting Defaults for Admissions Application Data

Access the User Defaults 3 page (Set Up SACR, User Defaults, User Defaults 3).

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
<b>User ID:</b>	PS	<b>Name:</b>	Locherty,Betty	
<b>Academic Level:</b>	Graduate			
<b>Application Method:</b>	Appl Serv			
<b>Last School Attended:</b>	000010005		Jordan High School	
<b>Graduation Date:</b>	06/15/2005			
<b>Housing Interest:</b>	On Campus			
	<input checked="" type="checkbox"/> <b>Financial Aid Interest</b>			
<b>External Acad Data Defaults</b>				
<b>Transcript Type:</b>	Official			
<b>Transcript Rcvd Data Source:</b>	ETS			
<b>Transcript Rcvd Medium:</b>	Hard Copy			

## User Defaults 3 page

Enter default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

<b>Academic Level</b>	Select an academic level for the applicant, such as <i>Freshman</i> , <i>Junior</i> , or <i>Not Set</i> .
<b>Application Method</b>	Select the medium by which the institution received the student's application, such as <i>Diskette</i> , <i>Hard Copy</i> , or <i>Web Appl</i> (web application).
<b>Last School Attended</b>	Enter a value in this field if you receive numerous applications from a particular school. The values depend on the options that are set up in the system.
<b>Graduation Date</b>	Enter a value here if many applicants share the same graduation date. No default value is delivered for this field.
<b>Housing Interest</b>	Select <i>Commuter</i> , <i>Off Campus</i> , or <i>On Campus</i> .
<b>Financial Aid Interest</b>	Select to have the Financial Aid Interest indicator set by default in the admissions application information.

**External Acad Data Defaults (external academic data defaults)**

<b>Transcript Type</b>	Select <i>Official</i> or <i>Unofficial</i> for this field to indicate if a transcript is official or unofficial.
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**Transcript Rcvd Data Source** Select the data source used to transmit the academic transcript to the (transcript received data source) institution.

**Transcript Rcvd Medium** Select *EDI* or *Hard Copy* to indicate the medium by which the transcript is (transcript received medium) received at the institution.

### See Also

*PeopleSoft Recruiting and Admissions PeopleBook*

## Setting Defaults for Printing Transcripts, Award Notifications, and SEVIS

Access the User Defaults 4 page (Set Up SACR, User Defaults, User Defaults 4).

The screenshot displays the 'User Defaults 4' configuration page. At the top, there are navigation tabs: 'User Defaults 1', 'User Defaults 2', 'User Defaults 3', 'User Defaults 4' (selected), and 'Enrollment Override Defaults'. Below the tabs, the user's details are shown: 'User ID: PS' and 'Name: Locherty, Betty'. A 'Carry ID' checkbox is checked. The 'Output Destination' is a dropdown menu set to 'Printer'. The 'Transcript Type' is 'ALLOF' with a search icon, and the text 'Official Transcripts - All' is displayed. A 'SEVIS Default' section contains 'School Code: DAL214F12345123' and 'Program Number: F-1-58900' with search icons, and the text 'PeopleSoft International School' is displayed. At the bottom, there is a 'Printer Name' field and an 'Explain' link.

User Defaults 4 page

### Carry ID

Select to have the system carry the ID of the last entered (or selected) individual or organization from search box to search box and from page to page. If you select the Carry ID option, you do not have to repeatedly enter or select the ID when you modify or review data for an individual or organization.

<b>Output Destination</b>	Select the default destination for printing transcripts. Select <i>EDI</i> , <i>Page</i> , or <i>Printer</i> .
	<b>Note.</b> Output destination values are shipped with the system as translate values. Do not modify these translate values in any way. Any modifications of these values require a substantial programming effort.
<b>Transcript Type</b>	Enter the default value for the type of transcripts that you generally print. The options depend on which values are set up in the system.
<b>Printer Name</b>	List the default Postscript printers that you use to print award notifications. Click the <a href="#">Explain</a> link for more detailed information.
<b>SEVIS Default</b>	
<b>School Code</b>	Enter the default school code that populates fields in the SEVIS F/M Visa components.
<b>Program Number</b>	Enter the default program sponsor number that populates fields in the SEVIS J Visa components.

## Setting Defaults for Enrollment Overrides

Access the Enrollment Override Defaults page (Set Up SACR, User Defaults, Enrollment Override Defaults).

The screenshot shows a web application interface with several tabs at the top: "User Defaults 1", "User Defaults 2", "User Defaults 3", "User Defaults 4", and "Enrollment Override Defaults". The "Enrollment Override Defaults" tab is active. Below the tabs, the user information is displayed: "User ID: PS" and "Name: Locherty, Betty". Below that, the enrollment access ID is shown as "FULL" with the description "Full Class Enrollment Access". A section titled "Default Overrides" contains a list of seven items, each with a checkbox: "Override Class Limit" (checked), "Override Unit Load" (checked), "Override Class Permission" (unchecked), "Override Requisites" (unchecked), "Override Time Conflict" (unchecked), "Override Action Date" (unchecked), and "Wait List Okay" (checked).

Enrollment Override Defaults page

Select the default overrides for the enrollment access ID shown. Only those overrides to which an enrollment access ID has access can be set as defaults. The overrides selected here are set during the enrollment access ID setup. You can override these settings.

**See Also**

Chapter 16, "Securing Student Records," Setting Up Enrollment Access IDs, page 300

## Setting Defaults for Communication Keys

Access the Communication Speed Keys page (Set Up SACR, User Defaults, Communication Speed Keys).

The screenshot displays the 'Communication Speed Keys' configuration page. At the top, navigation tabs include 'User Defaults 3', 'User Defaults 4', 'Enrollment Override Defaults', 'Communication Speed Keys', and 'User 3C Groups Summary'. The user profile shows 'User ID: PS' and 'Name: Locherty, Betty'. There are two main sections: 'Administrative Function' and 'Comm Key'. The 'Administrative Function' section contains one row with the following details: \*Academic Institution: PSUNV (PeopleSoft University), \*Administrative Function: ADMA, and Default Comm Key: UFAPPACK. The 'Comm Key' section contains one row with \*Comm Key: UFAPPACK and several checkboxes: Default Comm Key, Print Comment, Activity Completed, and Unsuccessful Outcome. Below these sections, there are fields for Method (L Letter), Direction (OUT), Letter Code (F01), and a Comment field.

Communication Speed Keys page

Communication speed keys enable you to create shortcuts for specifying common communication data. Users can select from base default communication keys or modify them. Users can also set up their own communication keys in addition to the base communication keys.

### **Administrative Function**

Set default communication keys for multiple administrative functions by adding a row for each administrative function.

**Academic Institution** Enter the academic institution for the administrative function.

**Administrative Function** Enter the administrative function to which the default communication key is assigned.

**Default Comm Key** (default communication key) Displays the communication key that you select as the default for the administrative function.



**No Default**

If you do not want to specify a default communication key for an administrative function, either select this check box or do not select a default communication key in the Comm Key (communication key) scroll area. The Default Comm Key field remains blank.

**Comm Key**

You can define only one default communication key for each administrative function. You can set multiple communication keys (or comm keys) by adding rows in the Comm Key scroll area.

**Comm Key** (communication key)

Enter the communication key that you want to use as a default for the administrative function. After you enter a value in this field, the *Category*, *Context*, *Method* and other comm key values appear.

**Default Comm Key** (default communication key)

Select to set this comm key as the default for the administrative function.

**Print Comment**

Select to have the system set the Print Comment flag to *True* by default for communications using this comm key.

**Activity Completed**

Select to have the system set Activity Completed flag to *True* by default for communications using this comm key.

**Unsuccessful Outcome**

Select to have the system set the Unsuccessful Outcome flag to *True* by default for communications using this comm key.

**See Also**

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Communications"

**Selecting the Type of 3C Group Access**

Access the User 3C Groups Summary page (Set Up SACR, User Defaults, User 3C Groups Summary).

Operator Group Summary			
Institution	Description	Inquiry Indicator	Update Indicator
PS Community College System	Admissions Operations Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University - NLD		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Alumni Director	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Alumni Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Alumni Membership	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Alumni Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Alumni Student Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Alumni Volunteers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Business Admissions Counselors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Business Admissions Operations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Business Adm Student Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Graduate Business Admissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Development Acknowl Coord	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Development Campaign Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Development Director	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Development Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Development Giving Club Coord	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Development Gift/Pledge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PeopleSoft University	Development Planned Giving	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### User 3C Groups Summary page

You can see only those items associated with the 3C groups to which you have access, as indicated by the selected check boxes. You can temporarily disable access to specific 3C groups that you do not want to view each time. Clear the Inquiry Indicator check box for those groups that you do not want to include in the default. The Update Indicator check box appears if the user can enter and edit data in the 3C group. Users cannot change update access on this page.

### See Also

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine," Setting 3C Engine Security

## Defining Contributor Relations User Defaults

To set up Contributor Relations user defaults, use the Operator Defaults component (AV\_OPR\_DEF1).

This section discusses how to:

- Set user defaults.
- Select default columns for the Profile Compare page.
- Specify custom setup for the Bio Bit and Bio Brief reports.

## Pages Used to Define Contributor Relations User Defaults

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Operator Defaults	AV_OPR_DEF1	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Operator Defaults, Operator Defaults	Select default system values based on the user ID.
Select Profile Compare Columns	AV_PROF_CMP_DEF_SP	Click the Profile Compare Columns button on the Operator Defaults page.	Set up the default columns that appear in the grid on the Profile Compare page.
Custom Bio Bit/Brief Setup	AV_BIO_CUST_SP	Click the Bio Bit/Brief button on the Operator Defaults page.	Set up the default items included in customized Bio Bit and Bio Brief reports that you generate. You can create a name for the default report and specify which items are included. The reports that you define here appear as available options in the Custom field on the Biographic Profile page.

## Setting User Defaults

Access the Operator Defaults page (Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Operator Defaults, Operator Defaults).

Operator Defaults

---

**User ID:** PS      Locherty, Betty

**Academic Institution:**  PeopleSoft University       **Auto Load Registers**

**Business Unit:**  Medical Business Unit     

**SetID:**  Model Business Rules     

Customize   Find   View All    First 1-3 of 3 Last					
	Des BU	Designation	Initiative Code	Appeal Code	
1	<input type="text" value="LAWBU"/>	<input type="text" value="LAWSCHOOL"/>	<input type="text" value="LAW SCHOOL"/>	<input type="text" value="LAWBLDG"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	<input type="text" value="MEDBU"/>	<input type="text" value="MEDICALBLDG"/>	<input type="text" value="MED BLDG"/>	<input type="text" value="ANNUAL"/>	<input type="button" value="+"/> <input type="button" value="-"/>
3	<input type="text" value="PSUNV"/>	<input type="text" value="ANNUALFUND"/>	<input type="text" value="ANNFUND"/>	<input type="text" value="ANNUAL"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Person Profile

**Profile View:**

**Address Type:**

**Phone Type:**

**Email Type:**

Operator Defaults page

- Academic Institution**      Enter the default academic institution for the current user. This academic institution appears by default on all pages where an institution is required, but it can be overridden. The full name of the academic institution that you enter appears next to this field.
- Business Unit**      Enter the default business unit for the current user. This business unit appears by default on all pages where a business unit is required, but it can be overridden. The full name of the business unit that you enter appears next to this field.
- SetID**      Enter the default setID for the current user. This setID appears by default on all entry pages where a setID is required, but it can be overridden. The full name of the setID that you enter appears next to this field.
- Auto Load Registers**      Select to automatically load data with the defaults that the user selects on this page when you access the Commitment Register and Transaction Register pages.
- Profile Compare Columns**      Click to set up the default columns that appear in the grid on the Profile Compare page. The Select Profile Compare Columns page appears. You set default columns here, but you can change the columns on a temporary basis on the Profile Compare page as well.

<b>Bio Bit/Brief</b>	Click to set up the default items included in customized Bio Bit and Bio Brief reports that you generate. You can create a name for the default report and specify which items are included. The reports that you define here appear as available options in the Custom field on the Biographic Profile pages.
<b>Des BU (designation business unit)</b>	Select the default designation business unit to appear when entering gift or pledge transactions in the system. The designation business unit is the default business unit to which commitments are allocated. These defaults can be overridden on the Session Defaults page within a session and on the entry page.
<b>Designation</b>	Select the default designation to appear when entering gift or pledge transactions in the system. The designation is the default designation to which commitments are allocated. These defaults can be overridden on the Session Defaults page within a session and on the entry page.
<b>Initiative Code</b>	Enter the default initiative code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden on the Session Defaults page within a session.
<b>Appeal Code</b>	Enter the default appeal code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden on the Session Defaults page within a session.

### ***Person Profile***

The values that you select here determine a user's default views of information on the Person Profile page.

<b>Profile View</b>	Select the profile view— <i>Biographic, Commitment, or Participation</i> —that appears.
<b>Address Type</b>	Select the address type that appears.
<b>Phone Type</b>	Select the phone type that appears.
<b>Email Type</b>	Select the email type that appears.

## **Selecting Default Columns for the Profile Compare Page**

Access the Select Profile Compare Columns page (click the Profile Compare Columns button on the Operator Defaults page).

Select the check box next to each field to appear as a default column on the Profile Compare page.

## **Specifying Custom Setup for the Bio Bit and Bio Brief Reports**

Access the Custom Bio Bit/Brief Setup page (click the Bio Bit/Brief button on the Operator Defaults page).

Enter the name of the default report, and then select the check box next to each item to include in the report.

Relationship information is broken down by the following selections:

<b><i>Item</i></b>	<b><i>Included Relationship Types</i></b>
Spouse Info. (spouse information)	Spouse
Family Info. (family information)	Brother, Daughter, Father, Grandfather, Other Relation, Son, Step-Father, Sister, Self, and Step Mother
Other Relation	Employee, Employer, Friend, Ln Co-Makr, Ln-Refernc, Ln Co-Sign, Neighbor, None Indi, Other, Partner, Roommate, and Works for

## Chapter 22

# Working with PeopleSoft Directory Interface for Campus Solutions

This chapter provides an overview of PeopleSoft Directory Interface for Campus Solutions customers. If you have also licensed the PeopleSoft HRMS application, also refer to the *PeopleSoft HRMS Application Fundamentals PeopleBook*, "Working with PeopleSoft Directory Interface for PeopleSoft HRMS" chapter. This chapter also discusses how to:

- Load data for Campus Solutions.
- Use PeopleSoft Directory Interface with Campus Solutions.

### See Also

*PeopleSoft HRMS Application Fundamentals PeopleBook*, "Working with PeopleSoft Directory Interface for PeopleSoft HRMS"

---

## Understanding PeopleSoft Directory Interface

PeopleSoft Directory Interface enables you to share data that is maintained in the Campus Solutions database with the Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and maintenance.

---

## Prerequisite

Before you can use the PeopleSoft Directory Interface, you must first select the product on the Installation page (Set Up HRMS, Install, Installation Table, Products).

---

## Loading Data for Campus Solutions

After you set up PeopleSoft Directory Interface, you can load the data into the directory using either the Directory Load process or the DSMAPINPUT FullSync process.

The Directory Load process sometimes experiences performance issues when loading a large volume of data. To avoid these issues, use the DSMAPINPUT FullSync process to load person data (instead of using the Directory Load process).

---

**Note.** Both the DSMAPINPUT FullSync and the Directory Load processes overwrite any existing data in the directory. Use one or the other. The Directory Load process is documented in the *PeopleSoft Directory Interface PeopleBook*.

---

### **See Also**

*PeopleSoft Components for PeopleSoft HRMS and Campus Solutions PeopleBook: PeopleSoft Directory Interface*

---

## **Using PeopleSoft Directory Interface with Campus Solutions**

This section discusses how to:

- Access sample mappings and delivered messages.
- Use sample mappings.
- Review delivered messages.
- Use best practices when working with maps.

### **Accessing Sample Mappings and Delivered Messages**

If you have licensed PeopleSoft Directory Interface, the system provides sample mappings and messages for both HRMS applications and Campus Solutions applications.

### **See Also**

*PeopleSoft Components for PeopleSoft HRMS and Campus Solutions PeopleBook: PeopleSoft Directory Interface*

### **Using Sample Mappings**

To use sample mappings that are delivered with the PeopleSoft system, establish directory IDs in the Directory Configurations component and add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

For Campus Solutions customers, PeopleSoft Directory Interface delivers two sets of sample maps for Applicant, Advisor/Instructor, Student and CS Person. One set is for the use of a hierarchical directory interface tree (that contains multiple nodes, such as organizational unit *ou* or location *l*), and one set for the use of a flat directory interface tree (for example that has no node in between the common name *cn* and the organization *o*). The sample map names delivered for a flat directory interface tree end with *\_FLAT*.



The hierarchical sample maps are useful for customers that have licensed the HRMS application and are using maps similar to the ones provided for HRMS. Even if the student population (mostly persons of interest, POIs) will likely not be assigned a department and a location, you can set a default value inside the maps for these two nodes. Set up DN default values on the DN Defaults page (Enterprise Components, Directory Interface, Mappings, Directory Maps, DN Defaults). When you set up DN default values, you allow the system to use the same DN for all of the person IDs, regardless of whether they have the necessary data to be placed underneath a node. If a POI is hired at a later time and assigned a department ID and a location, PeopleSoft Directory Interface moves the person into the newly specified department and location branches. In this way, PeopleSoft Directory Interface ensures that only one entry exists in the directory for a specific person.

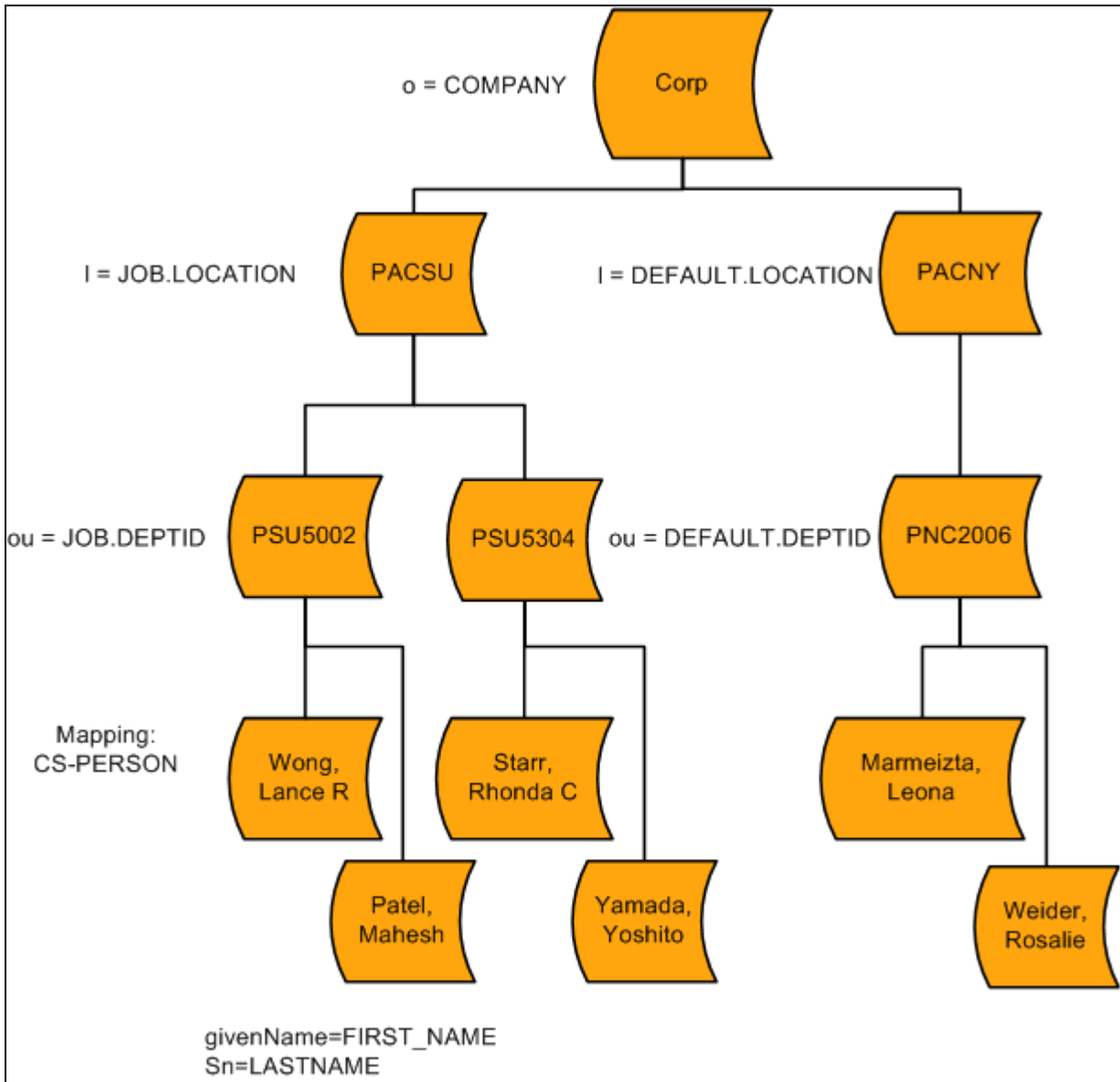
---

**Note.** The system uses DN default values only if the values of the Record field where they're defined are blank; if the Force check box is selected, the system overwrites the Record. You can use DN default values to force all POIs without a department ID and location into a predefined directory branch by setting the appropriate values on the DN defaults page.

---

The *PeopleSoft HRMS Integration Interfaces PeopleBook* explains how to set up a DN.

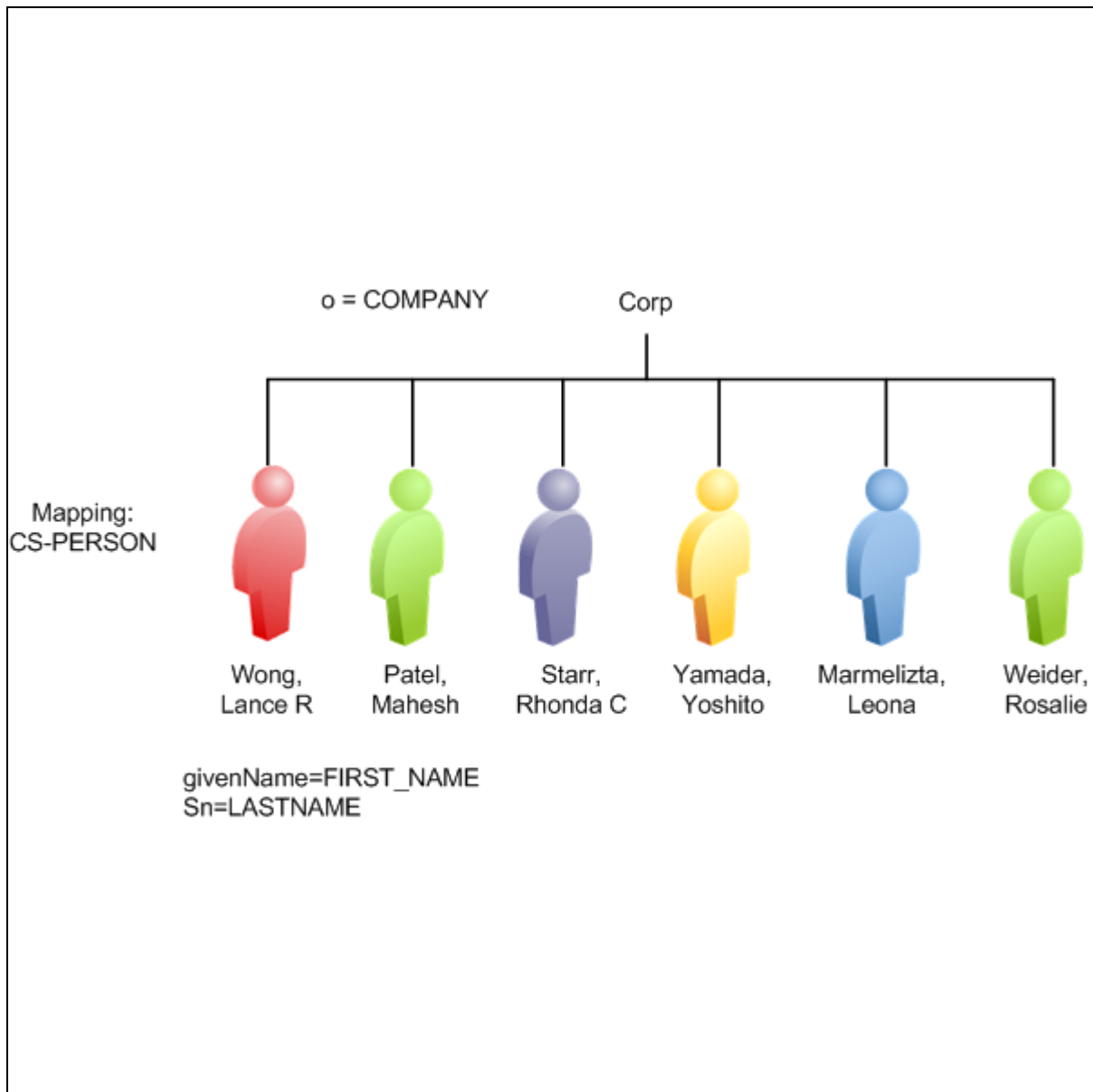
Hierarchical sample maps have the following structure:



Campus Solutions Sample Directory Interface tree: hierarchical

The flat maps style can be used for Campus Solutions customers that have not licensed the HRMS application. It keeps the data in the directory placed under the same node and also prohibits duplicate entries. Note that flat maps do not require you to use DN default values.

Flat sample maps have the following structure:



Campus Solutions Sample Directory Interface tree: flat

---

**Note.** Even if PeopleSoft Directory Interface delivers hierarchical maps for HRMS, you could use a flat tree instead, where no nodes exist between the common name *cn* and the organization *o*.

---

### See Also

*PeopleTools PeopleBook: Security Administration*

## Reviewing Delivered Messages

The following sections describe the delivered sample messages and PeopleCode functions that are related to the directory mappings.

## Directory Interface Messages

PeopleSoft Directory Interface delivers the following sample messages for mapping Campus Solutions data to the directory.

<b>Message Name</b>	<b>Directory Entry</b>
DSPERSON_BASIC_SYNC DSPERSON_BASIC_SYNC_EFF	Person Entry
DSADVSR_SYNC DSADVSR_SYNC_EFF DSMAPINPUT_ADVSR	Advisor/Instructor Entry
DSAPPLICANT_SYNC DSAPPLICANT_SYNC_EFF DSMAPINPUT_APPLICANT	Applicant Entry
DSSTUDENT_SYNC DSSTUDENT_SYNC_EFF DSMAPINPUT_STUDENT	Student Entry
DSPERSON_SYNC DSPERSON_SYNC_EFF DSMAPINPUT_PERSON_SA	CS Person Entry

See *PeopleTools PeopleBook: PeopleSoft Integration Broker*

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*

See *PeopleTools PeopleBook: Supported Integration Technologies*

See *PeopleSoft HRMS Application Fundamentals PeopleBook, "Working with PeopleSoft Directory Interface for PeopleSoft HRMS"*

## Message Publish

The following example is Publish PeopleCode that is used in a component's SavePostChange PeopleCode:

```
Local Message &MSG;
Local Rowset &COMPONENTROWSET;
&COMPONENTROWSET = GetLevel0();
&MSG = CreateMessage(MESSAGE.WANDA_PERSPUB);
&MSG.CopyRowsetDeltaOriginal(&COMPONENTROWSET);
&MSG.Publish();
```

---

**Note.** When publishing mapping data, use CopyRowsetDeltaOriginal, not CopyRowsetDelta.

---

### ***Message Subscription for Hierarchical Maps***

The following example shows handler application class in a message when using hierarchical maps:

```
Declare Function ProcessMappingMessage PeopleCode FUNCLIB_EO_DS.DSMAPMESSAGE Field⇒
Formula;

Local Message &msgIn;

/* Build the Mapping messages from the input message */

&msgIn = GetMessage();

ProcessMappingMessage(&msgIn, "DSMAPINPUT", True, "");
```

### ***Message Subscription for Flat Maps***

The following example shows handler application class in a message when using flat maps:

```
Declare Function BuildMappingMessage PeopleCode FUNCLIB_EO_DS.DSMAPMESSAGE Field⇒
Formula;

Component string &DSMapname;

Local Message &DSMsg;

&DSMsg = GetMessage();

&MsgName = &DSMsg.Name;

/* Create a SQL statement to retrieve the Names of all the Mappings that⇒
reference this Message */

&MapSQL = CreateSQL("SELECT DSMAPNAME FROM PS_EO_DSMAP WHERE MSGNAME = :1 AND⇒
STATUS = 'A' ", &MsgName);

While &MapSQL.Fetch(&DSMapname)

BuildMappingMessage(&DSMsg, &MsgName, True, &DSMapname);

End-While;
```

### ***BuildMapping Message Syntax***

The BuildMappingMessage function populates a message with data that is stored in another message and with data from the local database. After populating the message from the two data sources, it calls the mapping function. When all the data required for directory mapping does not exist in the original published message, BuildMappingMessage uses this function instead of directly calling the mapping function:

```
BuildMappingMessage (input message, output message, on-line flag, [, map name])
```

The function performs the following tasks:

- Copies data in the same record from the input message into the output message.
- Searches for empty records in the output message.

- Examines data in the message for key values for empty records.
- If it finds key values for empty records, populates empty records in the output message by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for the specified name.

Otherwise, it calls the mapping function for each map referencing the output message.

The BuildMappingMessage code is in the FUNCLIB\_EO\_DS derived record, DSMAPMESSAGE field, Field Formula event.

### Parameters

<b>Name</b>	<b>Type</b>	<b>Description</b>
input message	Message	Pass the message containing the originally published data.
output message	String	Specify the name of the message to be created, populated, and passed to the mapping function.
online flag	Boolean	Set to <i>true</i> if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function, but it is passed to the mapping function.  Set to <i>false</i> if the function is called through a background process, such as Directory Audit.
map name	String	Specify the name of the map to be used if the function does not call every map associated with the output message.

Here is an example:

```
Local Message &MsgIn;
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

## Using Best Practices when Working with Maps

To avoid problems with directory maps, confirm the following information:

1. Confirm that the PeopleSoft Directory Interface product is selected on the Installation page: Set Up HRMS, Install, Installation Table, Products.

2. Confirm that the PeopleSoft database is properly connected to the directory: Enterprise Components, Directory Interface, Definitions, Directory Configurations, Test Connectivity.

Both the Running Bind Test and Running Search Test fields should display *Success*.

3. Confirm that the schema extensions were loaded from the delivered DMS scripts (for CS and for HRMS, if needed): Enterprise Components, Directory Interface, Definitions, Directory Configurations, Schema Management.

You should see rows in the Apply PeopleSoft Schema Extensions grid.

4. Confirm that you ran the Schema Cache process: Enterprise Components, Directory Interface, Definitions, Schema Caching.
5. Confirm that the Campus Solutions delivered messages are listed in Integration Broker transactions and are active: PeopleTools, Integration Broker, Node Definitions, Transaction.

Make sure that these Campus Solutions messages are listed with their latest version activated:

- DSADVSR\_SYNC
- DSADVSR\_SYNC\_EFF
- DSAPPLICANT\_SYNC
- DSAPPLICANT\_SYNC\_EFF
- DSDEPT\_SYNC
- DSDEPT\_SYNC\_EFF
- DSPERSON\_BASIC\_SYNC
- DSPERSON\_BASIC\_SYNC\_EFF
- DSSTUDENT\_SYNC
- DSSTUDENT\_SYNC\_EFF

The messages should appear twice: once for Transaction Type = Inbound Asynchronous and once for Transaction Type = Outbound Asynchronous.

6. Confirm that these messages are also activated in Application Designer: Application Designer, File, Open, Message.

Select the messages listed above, then right-click the version number. Select Message Properties, Use. The Status should be set to *Active*.

7. Confirm that the message subscriptions PeopleCode is active for all of the messages listed above: Application Designer, File, Open, Message.

Select the messages listed above, then right-click the XxxxSyncEff message subscription. Select Message Subscription Properties, Use. The Status should be set to *Active*.

---

**Note.** If you are using *flat* maps, the message subscriptions for messages that end with *\_EFF* should have *DSMappingSub* activated and *UsingDSMAPINPUTSub* inactivated. If you are using *hierarchical* maps, the opposite should be true.

---

8. Confirm that the DIR\_INTFC and DSCHNL channels are running: PeopleTools, Integration Broker, Monitor, Service Operations Monitor, Channel Status.
9. Confirm that you can ping the node successfully: PeopleTools, Integration Broker, Monitor, Service Operations Monitor, Note Status.
10. Confirm that the domain is active: PeopleTools, Integration Broker, Monitor, Service Operations Monitor, Domain Status.
11. Confirm that you do not see errors in the PS\_EO\_DSBILOAD\_ERR table when triggering a map.
12. If a map does not trigger the data to the directory, confirm that the messages were triggered: PeopleTools, Integration Broker, Monitor, Service Operations Monitor: Overview and Message Instances tabs.

**See Also**

*PeopleTools PeopleBook: PeopleSoft Integration Broker Service Operations Monitor*



## Chapter 23

# Setting Up Adapters

This chapter provides an overview of adapters and discusses how to:

- Set up adapter types.
- Set up adapters.

### **See Also**

*Electronic Payment Integration Developer's Reference Guide* on My Oracle Support, ID 751540.1.

---

## Understanding Adapters

This section provides an overview of:

- Adapter types
- Adapters

### **Understanding Adapter Types**

The Adapter Type Table component is used to categorize or group adapters by purpose. This data is considered system data and is prefixed with a valid Campus Solutions owner ID—for example SCC, SSF, SFA—to identify it as CS system data. If you define your own adapter types, you should use your own naming convention to prevent your definitions being overlaid by the delivery of new features utilizing the adapters. This also applies for the Adapter Table component.

Delivered adapter types are:

- SCC\_EPAYMENT: ePayment adapters.
- SCC\_HOSTEDPY: Hosted Payment adapters.
- SCC\_PMT\_APPL: Payment Application adapters.
- SSF\_SHSECRET: Shared Secret adapters.
- SSF\_EPMTTRAN: SF ePayment Transactions

The SF ePayment Transactions adapters interact with the SF Payment Transaction Manager to validate and secure the transaction, retrieve the application transaction data, update the application-specific tables with the results of payment authorization.

## **Understanding Adapters**

The Adapter Table component is used to create a pointer to a specific application class. The application logic uses the Adapter Table definition to determine the application class that should be invoked for a specific processing purpose based on the Adapter ID.

Delivered Adapters are:

- SCC\_BUS\_INTERLINK: Adapter Type (SCC\_EPAYMENT) Description (Business Interlink Adapter).
- SCC\_INT\_BROKER: Adapter Type (SCC\_EPAYMENT) Description (Integration Broker Adapter).
- SCC\_MODEL1A: Adapter Type (SCC\_HOSTEDPY) Description (Token-based Integration)
- SCC\_MODEL1B: Adapter Type (SCC\_HOSTEDPY) Description (Token-based Integration)
- SCC\_TEST: Adapter Type (SCC\_PMT\_APPL) Description (Test Payment Application)
- SSF\_BIRTHDATE: Adapter Type (SSF\_SHSECRET) Description (Birth Date)
- SSF\_CASHIERING: Adapter Type (SCC\_PMT\_APPL) Description (Cashiering Hosted Payment)
- SSF\_PIN: Adapter Type (SSF\_SHSECRET) Description (PIN)
- SSF\_SS\_PMT: Adapter Type (SCC\_PMT\_APPL) Description (Self Service Payments)
- SSF\_AAWS: Adapter Type (SSF\_EPMTTRAN) Description (Application Fee Payment Trans)

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Setting Up ePayment Processing."

The SSF\_AAWS adapter handles all selects/updates to the Application Staging records during the AAWS fee payment process.

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Using Student Financials Web Services for Hosted ePayment Transactions."

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Managing PeopleSoft Admission Transactions."

### **See Also**

On My Oracle Support, ID 751540.1: *PeopleSoft Campus Solutions 9.0 Admission Applications Web Services Developer's Guide*

On My Oracle Support, ID 751540.1: *PeopleSoft Campus Solutions 9.0 Admission Applications Web Services User's Guide*

---

## **Setting Up Adapter Types**

This section discusses how to set up adapter types.

## Page Used to Set Up Adapter Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Adapter Type Table	SCC_INTTYPE_TBL	Set Up SACR, System Administration, Utilities, Adapter Registry, Adapter Type Table, Adapter Type Table	Set up adapter types.

## Setting Up Adapter Types

Access the Adapter Type Table page (Set Up SACR, System Administration, Utilities, Adapter Registry, Adapter Type Table, Adapter Type Table).

### Adapter Type Table

**Adapter Type:**      SCC\_EPAYMENT

**Description:**     

**Comments:**

This adapter type is used for processing general electronic payment transactions (Authorizations, Settlements and Credits).

Adapter Type Table page

Select SCC\_EPAYMENT for electronic payment or SCC\_HOSTEDPY for hosted payment.

Select SSF\_EPMTTRAN for AAWS application fee processing.

Define additional adapter types as required.

---

## Setting Up Adapters.

This section discusses how to set up adapters.

## Page Used to Set Up Adapters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Adapter Table	SCC_EPAY_INT_REG	Set Up SACR, System Administration, Utilities, Adapter Registry, Adapter Table, Adapter Table	Set up adapters.

## Setting Up Adapters

Access the Adapter Table page (Set Up SACR, System Administration, Utilities, Adapter Registry, Adapter Table, Adapter Table).

### Adapter Table

**Adapter ID:** SCC\_INT\_BROKER

**Adapter Type:** EPayment Adapters

**Description:**

**Long Description:**  ▲  
▼

**Parameters**

**Root Package ID:**  🔍

**Path:**  🔍

**Application Class ID:**  🔍

Adapter Table page

The Adapter ID field identifies the adapter.

### ***Parameters***

**Root Package ID** Select a root Application Class package.

**Path** Select a non-root Application Class package.

**Application Class ID** Select the Application Class of the adapter.

## Chapter 24

# Setting Up Equation Engine

Before using Equation Engine, you must complete the steps described in this section. This chapter discusses how to:

- Complete Equation Engine setup.
- Review and test the units of converted equations.

---

## Completing Equation Engine Setup

You must set up Equation Engine before using it. This section discusses how to:

- Recompile all equations prior to using Equation Engine.
- Verify equation security objects.
- Adjust equation security.
- Create a tree hierarchy.
- Set up security authorizations.

## Pages Used to Set Up Equation Engine

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Run An Equation	SCC_EQTN_RUN_CNTL	Set Up SACR, Common Definitions, Equation Engine, Run Equation, Run An Equation	Compile all equations prior to using Equation Engine.
User Profile Types	PSOPRALIASTYPE	PeopleTools, Security, Security Objects, User Profile Types, User Profile Types	Verify equation security objects.
Tree Definitions and Properties	PSTREEDEFN	Tree Manager, Tree Manager  Click the Tree Definition link on the Tree Manager page.	Adjusting equation security.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Create a tree hierarchy.
User Profiles	PSOPRALIAS	PeopleTools, Security, User Profiles, User Profiles	Set up security authorizations.

## Compiling All Equations Prior To Using Equation Engine

Access the Run An Equation page (Set Up SACR, Common Definitions, Equation Engine, Run Equation, Run an Equation).

Run An Equation page

---

**Note.** Anyone using Equation Engine in your organization must complete the steps in this section to recompile equations.

---

To recompile equations:

1. Enter the equation EQCOMPILEALL.
2. Leave the Global and Type fields blank.
3. Click the Run button.
4. Click the OK button on the Process Scheduler Request page.

5. Verify that the job ran successfully by checking the Process Monitor.

## Verifying Equation Security Objects

Access the User Profile Types page for EQD (PeopleTools, Security, Security Objects, User Profile Types, User Profile Types).

**Note.** Financial Aid and Student Financials administrators must complete the steps in this section to verify equation security objects.

### User Profile Types

**ID Type:** EQD  **Enabled?**

**\*Description:**  **\*Sequence number:**

**Long Description:**

Equation Engine Data table sets of authorization classes.

Field Information			Customize   Find   View All
#	*Field Name	*Record (Table) Name	Description Fieldname
1	OPRALIASVALUE	EQTN_TBAUTH_VW	

User Profile Types page (EQD)

Verify that the information that appears matches the information provided in the preceding page.

Search the following ID types:

- EQN
- EQS
- EQX

Access the User Profile Types page for EQN (PeopleTools, Security, Security Objects, User Profile Types, User Profile Types).

### User Profile Types

**ID Type:** EQN  **Enabled?**

**\*Description:**  **\*Sequence number:**

**Long Description:**

Field Information			
*Field Name	*Record (Table) Name	Description Fieldname	
1 OPRALIASVALUE	EQTN_IDAUTH_VW		+ -

User Profile Types page (EQN)

Verify that the information that appears matches the information provided in the preceding page.

Access the User Profile Types page for EQS (PeopleTools, Security, Security Objects, User Profile Types, User Profile Types).

### User Profile Types

**ID Type:** EQS  **Enabled?**

**\*Description:**  **\*Sequence number:**

**Long Description:**

Field Information			
*Field Name	*Record (Table) Name	Description Fieldname	
1 OPRALIASVALUE	EQTN_SQAUTH_VW		+ -

User Profile Types page (EQS)

Verify that the information that appears matches the information provided in the preceding page.

Access the User Profile Types page for EQX (PeopleTools, Security, Security Objects, User Profile Types, User Profile Types).



## User Profile Types

**ID Type:** EQX  **Enabled?**

**\*Description:**  **\*Sequence number:**

**Long Description:**

Equation Engine External Routine Authorization Sets of Classes.

Field Information			
#	*Field Name	*Record (Table) Name	Description Fieldname
1	OPRALIASVALUE	EQTN_XTAUTH_VW	

User Profile Types page (EQX)

Verify that the information that appears matches the information provided in the preceding page.

---

**Note.** Do not use the EQA ID type at this time.

---

## Adjusting Equation Security

Access the Tree Definitions and Properties page for EQTN\_IDAUTH\_TREE (Tree Manager, Tree Manager and click the Tree Definition link on the Tree Manager page).

---

**Note.** Financial Aid and Student Financials administrators must complete the steps in this section to adjust equation security.

---

### Tree Definition and Properties

\*Tree Name:

\*Structure ID:

\*Effective Date:  \*Status:

\*Description:

\*Category:

\*Use of Levels:  [Performance Methods](#)

Audits	Item Counts
<input type="checkbox"/> All Detail Values in this Tree <input type="checkbox"/> Allow Duplicate Detail Values  <input type="button" value="Perform Audits"/>	Node Count: 1 Leaf Count: 0 Level Count: 0 Branch Count: 0

Tree Definitions and Properties page (EQTN\_IDAUTH\_TREE)

Verify that the information that appears matches the information provided in the preceding page.

Search for the following tree names:

- EQTN\_SQAUTH\_TREE
- EQTN\_TBAUTH\_TREE
- EQTN\_XAUTH\_TREE

If you need to create any of these trees, also use the following page elements :

<b>SetID</b>	(blank)
<b>Set control value</b>	(blank)
<b>Tree branch</b>	(blank)
<b>Valid tree</b>	Valid tree.
<b>Tree root node</b>	PUBLIC

Access the Tree Definitions and Properties page for EQTN\_SQAUTH\_TREE (Tree Manager, Tree Manager and click the Tree Definition link on the Tree Manager page).


### Tree Definition and Properties

\*Tree Name:

\*Structure ID:

\*Effective Date:  \*Status:

\*Description:

\*Category:  

\*Use of Levels:  [Performance Methods](#)

Audits	Item Counts
<input type="checkbox"/> All Detail Values in this Tree	Node Count: 1
<input type="checkbox"/> Allow Duplicate Detail Values	Leaf Count: 0
<input type="button" value="Perform Audits"/>	Level Count: 0
	Branch Count: 0

Tree Definitions and Properties page (EQTN\_SQAUTH\_TREE)

Verify that the information that appears matches the information provided in the preceding page.

Access the Tree Definitions and Properties page for EQTN\_TBAUTH\_TREE (Tree Manager, Tree Manager and click the Tree Definition link on the Tree Manager page).

### Tree Definition and Properties

\*Tree Name:

\*Structure ID:

\*Effective Date:  \*Status:

\*Description:

\*Category:

\*Use of Levels:  [Performance Methods](#)

Audits	Item Counts
<input type="checkbox"/> All Detail Values in this Tree	Node Count: 1
<input type="checkbox"/> Allow Duplicate Detail Values	Leaf Count: 0
<input type="button" value="Perform Audits"/>	Level Count: 0
	Branch Count: 0

Tree Definitions and Properties page (EQTN\_TBAUTH\_TREE)

Verify that the information that appears matches the information provided in the preceding page.

Access the Tree Definitions and Properties page for EQTN\_XTAUTH\_TREE (Tree Manager, Tree Manager and click the Tree Definition link on the Tree Manager page).

### Tree Definition and Properties

\*Tree Name:

\*Structure ID:

\*Effective Date:  \*Status:

\*Description:

\*Category:

\*Use of Levels:  [Performance Methods](#)

Audits	Item Counts
<input type="checkbox"/> All Detail Values in this Tree	Node Count: 1
<input type="checkbox"/> Allow Duplicate Detail Values	Leaf Count: 0
<input type="button" value="Perform Audits"/>	Level Count: 0
	Branch Count: 0

Tree Definitions and Properties page (EQTN\_XTAUTH\_TREE)

Verify that the information that appears matches the information provided in the preceding page.

## Creating a Tree Hierarchy

Access the Tree Manager page (Tree Manager, Tree Manager).

### Tree Manager

SetID: Last Audit: Valid Tree

Effective Date: 01/01/1900 Status: Active

Tree Name: EQTN\_AEAUTH\_TREE Equation App Engine Auth Tree

[Save As](#) [Close](#) [Tree Definition](#) [Display Options](#) [Print Format](#)

[Collapse All](#) | [Expand All](#) Find First Page 1 of 1 Last Page

[PUBLIC - Public Access](#)

Tree Manager page

Create a tree hierarchy from the PUBLIC node if one does not already exist for each of the trees. The tree hierarchy should contain a separate node for Financial Aid administrators and a separate node for Student Financials administrators. You can break this down further if you want to limit who can run equations versus who can edit an equation within the groups.

<b>Tree Name</b>	<b>Description</b>
EQTN_IDAUTH_TREE	Authorizations for editing, viewing, or running equations.
EQTN_SQAUTH_TREE	Authorizations for editing or running equation SQL.
EQTN_TBAUTH_TREE	Authorizations for reading tables and view from an equation.
EQTN_XTAUTH_TREE	Authorizations for running external COBOL routines from an equation.

**Note.** Do not use EQTN\_AEAUTH\_TREE at this time.

Access the Edit Data page.

**Equation App Engine Auth Class:** PUBLIC

**Description:** Public Access

**Comments:** Everyone gets this degree of access.

*Equation App Engine Applid	*Authorization Level	Authorization Propagation Type		
	Execute	No Propagation	+	-
	Read	No Propagation	+	-
	Write	No Propagation	+	-

Edit Data page

Under each node, add or edit the list of objects and indicate what level of security should be applied to the node.

To do this, click the *Edit Data* icon (pencil icon) and then insert rows of equation object names and grant appropriate authorization levels.

**Execute** Select the *Execute* value if the user has the security clearance only to run equations.

**Read** Select the *Read* value if the user has the security clearance to read and run equations.

**Write** Select the *Write* value if the user has the security to write, read, and run equations.

All tables and views should have only *Read* access at this time. Equations should have a mix of authorizations depending on the position of the person accessing them. External routines and SQL should have only *Execute* access.

**Note.** You should create the node hierarchy and save the tree structure before adding equation object names so that authority propagation can take place.

Objects newly placed within the PUBLIC node should have their access propagated to *Append Auth to All Child Nodes*.

Save any changes you made to the trees.

## Setting Up Security Authorizations

Access the User Profiles page (PeopleTools, Security, User Profiles, User Profiles).

The screenshot displays the 'ID' tab of the User Profiles page. At the top, there are tabs for General, ID, Roles, Workflow, Audit, Links, and User ID Queries. The 'ID' tab is selected. Below the tabs, the user information is shown: User ID: HCQAFE0079 and Description: Test User: Analyst. The 'ID Types and Values' section has a search bar with 'Employee' selected. Below this is a table with the following data:

Attribute Name	Attribute Value	Description
EmpID	FE0079	Robert Dole

Below the table is the 'User Description' section, which contains a text field with 'Test User: Analyst' and a link to 'Set Description'. At the bottom of the page, there are several buttons: Save, Return to Search, Previous in List, Next in List, Add, and Update/Display.

User Profiles page: ID tab

For each person in a department who needs security authorization other than PUBLIC, you must follow these steps:

1. Enter the person's ID number and access the ID tab.
2. Enter each of the four EQ ID types in the ID Type and Values fields.
3. Enter the appropriate Equation Security Tree node name for each of these ID types.

4. Save the user profile.

### See Also

*PeopleTools PeopleBook: Security Administration*

---

## Review and Test the Units of Converted Equations

You should test any equation converted to Equation Engine from Equation Processor. This section discusses how to:

- Verify compiled equations.
- Define equation test data.

---

**Note.** Financial Aid administrators and Student Financials administrators must complete the steps in this section.

---

## Pages Used to Review and Test Units of Converted Equations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Equation Editor	EQUATION_EDITOR	Set Up SACR, Common Definitions, Equation Engine, Equation Editor	Verify compiled equations.
Equation Test Data	EQTN_TEST_DATA	Set Up SACR, Common Definitions, Equation Engine, Equation Test Data	Define equation test data.

## Verifying Compiled Equations

Access the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).



### Equation Editor

Equation Name EQTSTADD1

---

**Equation Table** Find | View All First 1 of 1 Last

\*Eff Date   Active  Enable Preview Results

Short Desc  \*Descr

Compile Status Not Yet Compiled

Equation Edit Function

---

**Equation Detail** Find | View All First 1-7 of 7 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Assign	Global Variable	X	<input type="text"/>
<input type="checkbox"/>	2		Number	1.00000	<input type="text"/>
<input type="checkbox"/>	3	+			<input type="text"/>
<input type="checkbox"/>	4		Number	2.00000	<input type="text"/>
<input type="checkbox"/>	5	+			<input type="text"/>
<input type="checkbox"/>	6		Number	3.00000	<input type="text"/>
<input type="checkbox"/>	7	End Assign			<input type="text"/>

---

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

*Application Prompt ID	
1	No Application Selected

---

**Parameters** Customize | Find | View All First 1 of 1 Last

Global	Type	Description
1		

Equation Editor page

Each administrator must review the equation names that he or she entered in the equation conversion setup tables prior to the upgrade.

For each equation, verify that it is compiled. If the equation is not compiled, you must edit it and compile it.

## Defining Equation Test Data

Access the Equation Test Data page (Set Up SACR, Common Definitions, Equation Engine, Equation Test Data).

**Equation Test Data**

Equation: EQTSTADD1      Test Add 1      **Test**

**Input Parameters**      Find | View All      First 1 of 1 Last

Global	Type	Operand
<input type="text"/>	String	<input type="text"/>

### Equation Test Data page

You can enter test data on this page. After the test data is entered, access the Equation Editor page and click the Test button.

Check the messages that the system provides to verify correct results of the equation test. If test data is missing, the message will identify what is missing.

Financial Aid administrators should carefully review any equations that reference the view FAN\_AWD\_PER\_VW. Specifically, verify whether an AWARD\_PERIOD of *B* (both) is being handled properly. If you want the system to use just the academic award period, you must decide whether you want it used as the first available award period (even if it is the nonstandard award period), or whether you want the system to return a total or maximum of a field. PeopleSoft Campus Solutions provides an alternate view called SFA\_PKAWDPER\_VW that you can use to return a total or maximum for an award period value of *B* (both) in addition to existing academic and nonstandard award period rows.

### See Also

[Appendix B, "Equation Engine Programmer's Guide," page 489](#)

## Chapter 25

# Working with Equation Engine

Equation Engine replaces the equation processor previously used in PeopleSoft Campus Solutions applications. The Equation Engine is a powerful tool that enables you to develop a variety of formulas that can be used to identify a specific student population, establish the assignment of an award, provide a calculated value, or provide a customization point in a process.

This chapter provides an overview of equations and discusses how to:

- Prepare to write equations.
- Name equations.
- Use views and tables in equations.
- Define an equation.
- Testing equations.
- View equations as algebraic expressions.
- Round in PeopleSoft Financial Aid packaging using equations.
- Review delivered equations.
- View sample equations.

---

## Understanding Equations

An equation is a defined series of statements that can calculate amounts or check criteria. In general, an equation is most often used to return one of the following items:

1. A True or False result. This is an equation that checks to determine whether certain criteria are met.
2. An amount. This is a calculation equation that results in a numeric value.

Equations can:

- Use algebraic statements.
- Use Boolean conditional statements.
- Look up information in tables.
- Update information in tables.

- Branch or link to another equation.

---

## Preparing to Write Equations

This section discusses how to prepare to write equations.

Before you write an equation, decide what information you want the equation to provide. You must know which fields exist in which tables to use an equation. For example, to determine whether all new transfer students who are receiving an FFELP loan have completed the required interview, you must know that a field exists to track the completion of the interview and in which table it is stored.

If you want the equation to select a population of students for a process, define the criteria exactly as well as the steps to make in selecting those students. If you want the equation to provide you with a calculated value such as an award maximum, determine where the value comes from and how it is calculated.

These criteria must be met to write an equation:

1. A table or view must exist to be named in an equation.
2. You must have security access to the table or view.
3. Table security must be turned on for you to access the table or view.
4. Any table or view that you access must not have a long VAR\_CHAR field in it.

### *Using Equation Keywords*

You must write equations using keywords and operands. A keyword is an instruction for the equation to perform. Equation keywords include:

<b>ASSIGN</b>	Assigns a value to a global or local variable in an equation.
<b>CALL</b>	Calls a subequation or an external routine or an SQL statement. When you CALL something, control returns to the statement after the CALL when the called item finishes. For a subequation, control might not return if that subequation issues a HALT statement. Calls to subequations pass parameters through local and global variables and pass values back through global variables. An equation can call itself. Calls to external routines pass parameters back and forth using global variables. Calls to SQL pass parameters back and forth as well and can be used to get an array of data or update relational tables.
<b>CHOOSE</b>	Can be used with the keywords INSERT, UPDATE; or DELETE, INSERT, UPDATE and DELETE. Use a WHERE clause to select a rowset. If the CHOOSE returns a global variable with the same name or the global variable A-SELECT with a value of TRUE, then that row will remain in the rowset. That is, the CHOOSE equation can be used to further limit the rows deleted.

<b>EXIST</b>	Tests for the existence of a local variable, a global variable, or a table. It returns numeric zero for false and numeric 1 for true. It yields false for a local or global variable that has not been assigned or a table with zero rows selected from a find.
<b>FIND FIRST</b>	Finds the first row in the specified table using the specified key values with relational operators (Equal or Greater-or-Equal) comparing these to either local or global variables. FIND NEXT does not have any key value parameters, but it finds the next row relating to the previously issued FIND FIRST. If a FIND is successful, then references to the table and fields for that FIND are valid and return the corresponding field values.
<b>FIND NEXT</b>	Points to the next occurrence of the row of fields in a FIND table. You can set up the equation so that failure to find an occurrence can be handled, for example, by the equation returning to the calling equation or program.
<b>IF</b>	Indicates a conditional statement that must be followed by a THEN keyword and can contain an ELSE or an ELSE IF keyword. It must be terminated by the keyword END IF. It compares one operand against another operand.
<b>LOOP</b>	Causes the equation to repeat the statements between the LOOP and the END LOOP statement in a loop until an EXIT LOOP statement is encountered within that loop, usually within an IF statement.
<b>MESSAGE</b>	Writes a message to the log.
<b>SKIP</b>	Used to make a program more readable. It enables you to break up the program statements, and it can simplify your IF logic.
<b>TRACE</b>	Writes debugging statements to the log and is used for problem resolution.

See [Appendix B, "Equation Engine Programmer's Guide," page 489.](#)

### ***Using Operand Types***

Equations employ operand types that identify the type of information contained in the operand that follows it. Type choices differ depending on where the operand type is located in the equation. Options include:

<b>Table</b>	Table or view name.
<b>Value</b>	Valid values for a field.
<b>SQL</b>	This operand applies only to the CALL statement.
<b>Global</b>	User-defined global variable.
<b>Local</b>	User-defined local variable.

See [Appendix B, "Equation Engine Programmer's Guide," page 489.](#)

## Using Operators

Equations use operands and operators. Operands are based on the previous type. Operators are entered in the keyword column and can be:

### Arithmetic

(+, —, \*, /) Add, Minus or Subtract, Multiply, Divide

Arithmetic operators apply to two expressions and provide an arithmetic result. You can use parentheses to group expressions or to make the equation more readable.

### Boolean

(AND, OR, NOT) These are logical operators. You use them within an IF statement. AND is used between two conditions. It indicates that both statements must be met for the selection to be made. For example, A and B must be true for a selection.

OR is used between two conditions. It indicates that only one of the statements must be met for selection to be made. For example, A OR B can be true for a selection.

NOT is used in conjunction with a condition to show that the condition does not exist. For example, NOT <condition>.

### Relational

(=, <, <=, >, >=, <>) Equal, Less than, Less than or equal, Greater than, Greater than or equal, Less than or Greater than (for example, not equal). Relational operators compare two expressions and provide a truth value. You can use parentheses to group expressions or to enhance readability.

See [Appendix B, "Equation Engine Programmer's Guide," page 489.](#)

## Using Variables

Two types of variables are available in the equation engine—local and global. The data is passed to the equation engine by means of the global variable array in a process instance of a copy of the global variables that is defined by the Equation Test Data page or by a calling program. Global variables are visible and are referenced by an equation that is running or called. Local variables are visible only to the currently running equation, but copies of local variables can be passed to called subequations as parameters.

See [Appendix B, "Equation Engine Programmer's Guide," page 489.](#)

---

## Naming Equations

This sections discusses how to name equations.

When you write a new equation, you must give it a name that follows strict naming guidelines. Your IT department will help you establish rules for equations within the institution. Do not use a naming convention that begins with the letters of a PeopleSoft product name or subproduct name. For example, do not use AA (academic advisement), AD (admissions), CC (campus community), CS (campus solutions), FA (financial aid), HR (human resources), SF (student financials), or SR (student records). Each department in the institution should have its own equation name prefix as well to avoid naming conflicts.

---

**Note.** You must not modify any system-specific equations because compromising those equations will cause negative processing ramifications for the specific feature.

---

### **See Also**

[Chapter 25, "Working with Equation Engine," Reviewing Delivered Equations, page 447](#)

## **Page Used to Name Equations**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Equation Editor	EQUATION_EDITOR	Set Up SACR, Common Definitions, Equation Engine, Equation Editor	Name an equation.

## **Naming an Equation**

Access the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

### Equation Editor

Equation Name EQTSTDEL8

---

**Equation Table** Find | View All | First 1 of 1 Last

\*Eff Date   Active  Enable Preview Results

Short Desc  \*Descr

Compile Status Not Yet Compiled

Equation Edit Function

---

**Equation Detail** Find | View All | First 1 of 1 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>		<input type="text"/>

---

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

*	Application Prompt ID	Sel
1	No Application Selected	<input type="checkbox"/>

---

**Parameters** Customize | Find | View All | First 1 of 1 Last

*	Global	Type	Description
1	<input type="text"/>	<input type="text"/>	<input type="text"/>

Equation Editor (EQTSTDEL8) page

Create an equation name based on established naming conventions for your organization.

---

## Using Views and Tables in Equations

This section discusses how to use views and tables in equations.



A view consists of information drawn from a table or multiple tables and can be accessed by an equation. Use a view whenever it can make the equation logic simpler. You should use a view only to access information contained in core tables.

---

**Note.** If you need to access information contained in a core table or a very large table, ask your organization's IT department to create a view of that table and add the view to the Equation Table Authorization Security Tree.

---

## Defining an Equation

This section provides an overview of application prompts, lists a prerequisite, and discusses how to define equations and application prompts.

## Understanding Application Prompts

If you are working on a particular feature, such as a packaging plan, and need to create one or more equations for that plan, you must define those equations here and include a short description and long description for the new equation.

You must then associate that equation with an application prompt. For example, the equation that you are creating is a packaging selection equation. Because this equation will be used to access a population of students—that is, it is a selection equation—you must assign the *Fin Aid Packaging Enter Eqtn* application prompt to the equation. You do that by selecting *Fin Aid Packaging Select Eqtn* from the drop-down list box. By associating the application prompt value with an equation here, this equation will appear in the list of available selection equations that you can use when creating your packaging plan in the Packaging Plan Setup table.

As another example, if you are working on a Student Financials tuition calculation feature, and you want to create an equation that will return an amount, you must associate your new equation with an application prompt. You would select *Stdnt Fin Tuition Amount Eqtns* or *Stdnt Fin Tuit Amount Limited*. After selecting one of these application prompts here, your new equation will appear on the list of possible equations to use when working with the tuition calculation setup feature.

---

**Warning!** Do not make any changes to the Application Prompt values.

---

The application prompts *Stdnt Fin Tuit Select Limited* and *Stdnt Fin Tuit Amount Limited* are used by equations that use only global variables from the STDNT\_CAR\_TERM record. Both prompts eliminate the need to repeatedly call the Equation Engine.

This table lists the application prompt to use based on the global variable:

<i>Student Financials Global Variables</i>	<i>Stdnt Fin Tuition Amount Eqtns</i>	<i>Stdnt Fin Tuition Select Eqtns</i>	<i>Stdnt Fin Tuition Amount Limited</i>	<i>Stdnt Fin Tuit Select Limited</i>
<i>INSTITUTION</i>	X	X	X	X
<i>BUSINESS UNIT</i>	X	X	X	X

<b>Student Financials Global Variables</b>	<b>Stdnt Fin Tuition Amount Eqtns</b>	<b>Stdnt Fin Tuition Select Eqtns</b>	<b>Stdnt Fin Tuition Amount Limited</b>	<b>Stdnt Fin Tuit Select Limited</b>
<i>ACAD_CAREER</i> (academic career)	X	X	X	X
<i>STRM</i> (term)	X	X	X	X
<i>EMPLID</i>	X	X	X	X
<i>STDNT_CAR_NBR</i> (student career number)	X	X	X	X
<i>BILLING_CAREER</i>	X	X	X	X
<i>A_AMOUNT</i>	X	X	X	X
<i>A_SELECT</i> (yes/no check box)	X	X	X	X
<i>SESSION_CODE</i>	X	X	NA	NA
<i>CLASS_NBR</i> (class number)	X	X	NA	NA
<i>CRSE_ID</i> (course ID)	X	X	NA	NA
<i>TRANS_DATE</i> (enrl_drop_dt)	X	X	NA	NA
<i>ENRL_ACTN_RSN_L</i> <i>AST</i> (enrolment action reason last)	X	X	NA	NA
<i>TRANS_TIME</i> (last drop term stamp)	X	X	NA	NA

---

**Note.** NA = Not Applicable

---

## Prerequisite

Before you define an equation on the Equation Editor page, you should devise a flow chart that considers what your end result should be. Using a flow chart will help you develop proper equation syntax.

## Page Used to Define an Equation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Equation Editor	EQUATION_EDITOR	Set Up SACR, Common Definitions, Equation Engine, Equation Editor	Define an equation and application prompts.

## Defining Equations and Application Prompts

Access the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

### Equation Editor

Equation Name: FAPDDEPENDNT

---

**Equation Table** Find | View All First 1 of 1 Last

\*Eff Date: 01/01/1900  Active  Enable Preview Results

Short Desc: Dependents \*Descr: Dependent Students

Compile Status: Not Yet Compiled

Equation Edit Function:

---

**Equation Detail** Find | View All First 1-18 of 24 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Assign	Local Variable	AWARD_PERIOD	
<input type="checkbox"/>	2		String	A	
<input type="checkbox"/>	3	End Assign			
<input type="checkbox"/>	4	Find First	Local Variable	FOUND_FAN_AWD_PER_VW	
<input type="checkbox"/>	5		Table	FAN_AWD_PER_VW	
<input type="checkbox"/>	6		Keyed Global Equal	EMPLID	
<input type="checkbox"/>	7		Keyed Global Equal	INSTITUTION	
<input type="checkbox"/>	8		Keyed Global Equal	AID_YEAR	
<input type="checkbox"/>	9		Keyed Local Equal	AWARD_PERIOD	
<input type="checkbox"/>	10	End Find			
<input type="checkbox"/>	11	If			
<input type="checkbox"/>	12		Table	STUDENT_AID	
<input type="checkbox"/>	13		Field	FED_DEPEND_STAT	
<input type="checkbox"/>	14	=			
<input type="checkbox"/>	15		String	D	
<input type="checkbox"/>	16	Then			
<input type="checkbox"/>	17	Assign	Global Variable	A_SELECT	
<input type="checkbox"/>	18		String	T	

---

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

\*Application Prompt ID

1 Fin Aid Packaging Select Eqtns

---

**Parameters** Customize | Find | View All First 1 of 1 Last

Global	Type	Description
1		

Equation Editor (FAPDDEPENDNT) page

**Equation Table**

**Eff Date**(effective date)      Enter a date after which the equation will be effective.

**Active**      This check box is selected when an equation is available for use.

<b>Enable Preview Results</b>	Select to preview results based on the parameters that you selected before you run the process. This check box can be selected on the Selection Tool page and is associated with the Pop Select feature.
<b>Short Desc</b> (short description)	Enter a short description for the equation based on the equation naming guidelines.
<b>Descr</b> (description)	Enter a description for this equation.
<b>Equation Edit Function</b>	Select an equation edit function value. This drop-down list box contains a selection of predefined edit functions to assist with tasks such as cutting and pasting, compiling, and printing an equation.

### ***Equation Detail***

<b>Keyword</b>	Select equation keywords that are necessary for your equation.
<b>Operand Type</b>	Select an operand type from the available options. This operand identifies the type of information contained in the operand that follows.
<b>Operand</b>	Enter the operand based on the operand type selected in the previous field.
<b>Comment</b>	Enter a short comment. This is not part of the equation.

### ***Application Prompts***

<b>Application Prompt ID</b>	Select an application prompt value. These prompt values control which equations will be available for you to choose from when defining equations for a particular feature. If you do not select an application prompt value for an equation here, that equation will not appear on the list of available equations for selection during feature processing.
------------------------------	---

Prompt values include:

*Fin Aid Loan Edits for CLA*

*Fin Aid Loan Edits for CRC*

*Fin Aid Packaging Amount Eqtns*

*Fin Aid Packaging Select Eqtns*

*Stdnt Fin Tuition Amount Eqtns*

*Stdnt Fin Tuition Selct Eqtns*

*Stdnt Fin Tuit Select Limited*

*Stdnt Fin Tuit Amount Limited*

## Parameters

<b>Global</b>	Enter a global variable value.
<b>Type</b>	Select an operand type from the available options. The operand type identifies the type of information contained in the operand that follows.

---

## Testing Equations

This section discusses how to:

- Define equation test data.
- View equation test run details.

To test the equation, you may need to set up test data. In an equation for which the sole function is to add a few numbers together, no test data is needed because all the data elements are provided. However, to test an equation that references keys in the table or passes global variables, the equation must have test data present.

## Pages Used to Test Equations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Equation Test Data	EQTN_TEST_DATA	Set Up SACR, Common Definitions, Equation Engine, Equation Test Data, Equation Test Data	Define equation test data.
Equation Test Results - Process Messages	EQTN_PRCS_MSGS	Click the Test button on the Equation Test Data page.	View the equation test run details.

## Defining Equation Test Data

Access the Equation Test Data page (Set Up SACR, Common Definitions, Equation Engine, Equation Test Data).

**Equation Test Data**

Equation: EQTSTCALL2 Test Call 2 Test

Input Parameters			Find   View All	First 1 of 1 Last
Global	Type	Operand		
FACTOR	Number	6.00000	+ -	

Equation Test Data page

Use this page to define the name of the global variable, type, and operand.

After you have defined all the necessary variables and entered data on the Equation Test Data page, click the Test button.

The system displays the Equation Test Results - Process Messages page.

---

**Note.** You can also run this process as a batch process rather than initiating it by the Test button.

To test the equation in batch, select the Run Equation option (Set Up SACR, Common Definitions, Equation Engine, Run Equation, Run an Equation).

You can also print the equation that has been established in batch by selecting the Print Equation option (Set Up SACR, Common Definitions, Equation Engine, Print Equations, Print an Equation).

---

## Viewing Equation Test Run Details

Access the Equation Test Results page: Process Messages tab (click the Test button on the Equation Test Data page).

Global Variables | **Process Messages**

### Equation Test Results

Equation: EQTSTCALL2      Test Call 2      Effective Date: 01/01/1900

**Process Instance Detail** [Find](#) | [View All](#)      First  1 of 1  Last

Process Instance: 1208

**Messages Logged** [Customize](#) | [Find](#) | [View All](#) |       First  1-3 of 3  Last

Msg Seq	Severity	DateTime	Details	Message Text
1	Message	13/10/2008 2:33:16PM	<a href="#">Details</a>	Equation runner started running EQTSTCALL2 at line 0. (14460,300)
2	Message	13/10/2008 2:33:17PM	<a href="#">Details</a>	6.00000 factorial is 720.00000 (14460,342)
3	Message	13/10/2008 2:33:17PM	<a href="#">Details</a>	Equation runner finished running EQTSTCALL2 at line 18. (14460,301)

Equation Test Results page: Process Messages tab

The page displays the messages associated with the equation test run.

Access the Global Variables tab.

Global Variables | **Process Messages**

### Equation Test Results

Equation Name: EQTSTCALL2      Test Call 2

Effective Date: 01/01/1900

**Process Instance Detail** [Find](#) | [View All](#)      First  1 of 1  Last

Process Instance: 1208

**Global Variable Final Values** [Find](#) | [View All](#)      First  1-7 of 25  Last

Global	Type	Operand
!CALLING-PROCESS-INSTANCE	Number	0.00000
!CURRENT-DATE	Date	13/10/2008
!CURRENT-DATE-TIME	String	2008-10-13-14.33.13.240000
!CURRENT-TIME	String	14.33.13.240000
!EQTN-EFFDT	Date	13/10/2008
!EQTN-MSG-SEQ	Number	0.00000
!EQTN-RESULTS-PREVIEW	String	N

Equation Test Results page: Global Variables tab

The Global Variable page displays the global variables used within the current equation run.



## Viewing Equations as Algebraic Expressions

This section discusses how to view equations as algebraic expressions.

You can view any equation that you are authorized to read on the Review Equations component (EQUATION\_VIEW).

### Page Used to View Equations as Algebraic Expressions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review Equations	SCC_EQUATION_VIEW	<ul style="list-style-type: none"> <li>Set Up SACR, Common Definitions, Equation Engine, Review Equations</li> <li>Click Equation Detail on the Related Item Type Group page, Packaging Plan page, FM Target page, IM Target page, Equity Rule page, Packaging Limits page, or the Packaging Rules 1 page to review an equation in read-only mode.</li> </ul>	View equations as algebraic equations.

### Viewing Equations as Algebraic Expressions

Access the Review Equations page (Set Up SACR, Common Definitions, Equation Engine, Review Equations).

```

- <EQUATION>
  <EQUATIONNAME>EQTSTCALL2</EQUATIONNAME>
  <SKIP />
  <COMMENT>Test Call 2</COMMENT>
- <IF>
  <NOT />
  Exists
  <LOCAL>FACTOR</LOCAL>
  <THEN />
- <ASSIGN>
  <LOCAL>FACTOR</LOCAL>
  <GLOBAL>FACTOR</GLOBAL>
</ASSIGN>
<CALL />
<EQTN>EQFACTORIAL</EQTN>
- <CALLPARMS>
  <LOCAL>FACTOR</LOCAL>
</CALLPARMS>
</IF>
- <MESSAGE>
  <GLOBAL>FACTOR</GLOBAL>
  <STRING>factorial is</STRING>
  <GLOBAL>RESULT</GLOBAL>
</MESSAGE>
<RETN />
</EQUATION>

```

Review Equations page

This page displays the equation name and an approximate algebraic representation of the equation. You cannot edit the equation in this page. Use the scroll bar to view the entire equation.

---

**Note.** This summary is a representation of the equation that you created on the Equation Editor page. The Equation Editor page determines how your equation functions.

---

## Rounding in PeopleSoft Financial Aid Packaging Using Equations

This section provides an overview of rounding in Financial Aid Packaging.

### Understanding Rounding in Financial Aid Packaging

The Packaging routine does not round up to whole dollar amounts when your equation yields a decimal result for a packaging limit. If the result contains decimals, the Packaging routine produces the following error message: "Message # 9146 Cannot disburse in whole dollars; award contains cents."

For those equations that need to yield a whole dollar result, you must use a rounding equation. You could accomplish this by employing one of two options:

- Option 1
  1. Create your A\_AMOUNT equation, and at the bottom of the equation insert a Call statement to the delivered sample equation FAPDROUNDAWD.
  2. Review the FAPDROUNDAWD equation to determine the number of places beyond the decimal point that you want (0=integers or whole numbers, 1, 2, and so forth).
  3. Ensure that the Equation EQROUND is called as part of FAPDROUNDAWD.
- Option 2
  1. Create your A\_AMOUNT equation, and at the bottom of the equation insert a Call statement to the delivered sample equation FAPDROUNDAWD.
  2. Review the FAPDROUNDAWD equation to determine the number of places beyond the decimal point that you want (0=integers or whole numbers, 1, 2, and so forth).
  3. Ensure that the Equation EQROUND is called as part of FAPDROUNDAWD.

---

**Important!** For this rounding logic to work properly, all elements of FAPDROUNDAWD must be employed, and EQROUND must be called as part of that routine. Do not modify these components.

---

Here are two of the rounding equations that PeopleSoft Campus Solutions delivers:

### Equation Editor

Equation Name: FAPDROUNDWD

---

**Equation Table** Find | View All | First 1 of 1 Last

\*Eff Date: 01/01/1900  Active  Enable Preview Results

Short Desc: Round Awd \*Descr: Round A\_AMOUNT

Compile Status: Not Yet Compiled

Equation Edit Function:

---

**Equation Detail** Find | View All | First 1-15 of 15 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			<input type="text"/>
<input type="checkbox"/>	2	Assign	Local Variable	ROUND_IN	<input type="text"/>
<input type="checkbox"/>	3		Global Variable	A_AMOUNT	<input type="text"/>
<input type="checkbox"/>	4	End Assign			<input type="text"/>
<input type="checkbox"/>	5	Assign	Local Variable	ROUND_PLACES	<input type="text"/>
<input type="checkbox"/>	6		Number	0.00000	<input type="text"/>
<input type="checkbox"/>	7	End Assign			<input type="text"/>
<input type="checkbox"/>	8	Call	Equation	EQROUND	<input type="text"/>
<input type="checkbox"/>	9	Call Params			<input type="text"/>
<input type="checkbox"/>	10		Local Variable	ROUND_IN	<input type="text"/>
<input type="checkbox"/>	11		Local Variable	ROUND_PLACES	<input type="text"/>
<input type="checkbox"/>	12	End Call Params			<input type="text"/>
<input type="checkbox"/>	13	Assign	Global Variable	A_AMOUNT	<input type="text"/>
<input type="checkbox"/>	14		Global Variable	ROUND_RESULT	<input type="text"/>
<input type="checkbox"/>	15	End Assign			<input type="text"/>

---

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

*Application Prompt ID	Description
1	No Application Selected

---

**Parameters** Customize | Find | View All | First 1 of 1 Last

Global	Type	Description
1		

Equation Editor (FAPDROUNDWD) page

### Equation Editor

Equation Name: EQROUND

---

**Equation Table** Find | View All | First 1 of 1 Last

\*Eff Date: 01/01/1900  Active  Enable Preview Results

Short Desc: Rounding \*Descr: Round to spec decimal places

Compile Status: Not Yet Compiled

Equation Edit Function:

---

**Equation Detail** Find | View 100 | First 1-18 of 103 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			Round to the spec
<input type="checkbox"/>	2	Assign	Local Variable	LOOP_IX	
<input type="checkbox"/>	3		Local Variable	ROUND_PLACES	Input Arg
<input type="checkbox"/>	4	End Assign			
<input type="checkbox"/>	5	If			
<input type="checkbox"/>	6		Local Variable	ROUND_IN	Input Arg
<input type="checkbox"/>	7	<			
<input type="checkbox"/>	8		Number	0.00000	
<input type="checkbox"/>	9	Then			
<input type="checkbox"/>	10	Assign	Local Variable	SAVE_SIGN	
<input type="checkbox"/>	11		Number	-1.00000	
<input type="checkbox"/>	12	End Assign			
<input type="checkbox"/>	13	Else			
<input type="checkbox"/>	14	Assign	Local Variable	SAVE_SIGN	
<input type="checkbox"/>	15		Number	1.00000	
<input type="checkbox"/>	16	End Assign			
<input type="checkbox"/>	17	End If			
<input type="checkbox"/>	18	Assign	Local Variable	SCALE_FACTOR_UP	

---

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

\*Application Prompt ID

1 No Application Selected

---

**Parameters** Customize | Find | View All | First 1 of 1 Last

Global	Type	Description
1		

Equation Editor (EQROUND) page

## Reviewing Delivered Equations

This section lists the PeopleSoft-delivered equations.

Oracle delivers a set of feature-specific equations as part of Equation Engine. These represent either system-specific or demonstration-based equations.

---

**Warning!** Do not modify any system-specific equations, because compromising those equations has negative processing ramifications for the specific feature.

---

You can view any equation that you are authorized to read on the Review Equations component (Set Up SACR, Common Definitions, Equation Engine, Review Equations).

**EQ\* — Delivered System and Demo Equations**

<b>Equation Name</b>	<b>Description</b>
EQCOMPILEALL	Compile All Active Equations
EQFACTORIAL	Factorial Sub Equation
EQROUND	Round to spec decimal places
EQROUNDBANK	Banker's Rounding
EQTNRUNCTL	Default Equation Run Control
EQTSTADD1	Test Add 1
EQTSTASGN1	Test Assignment Statement
EQTSTASSIGN2	Test Assign 2
EQTSTCALL1	Test Call 1
EQTSTCALL2	Test Call 2
EQTSTCALL3	Test Call 3
EQTSTCALL4	Test Call 4
EQTSTCALL5	Test Call 5
EQTSTCALL6	Test Call 6 - sql multi select
EQTSTCALL7	Test Call 7 - sql sel count
EQTSTCALL8	Call Test 8
EQTSTDDF	Test Date Difference
EQTSTDIV1	TEST DIVIDE 1
EQTSTEXIST1	Test Exist 1
EQTSTEXIST2	Test Exit 2

<b>Equation Name</b>	<b>Description</b>
EQTSTEXIST3	Test Exit 3
EQTSTEXT1	Test External 1
EQTSTEXT2	Test External 2
EQTSTFIND1	Test Find 1
EQTSTFIND2	Test Find 2
EQTSTFIND3	Test Find 3
EQTSTFIND4	Test Find 4
EQTSTFIND5	Test Find 5
EQTSTFIND6	Find 6
EQTSTHALT1	Halt Test 1
EQTSTIF1	Test If 1
EQTSTIF2	Test If 2
EQTSTIF3	Test If 3
EQTSTIF4	If Test 4
EQTSTLOOP1	Test Loop 1
EQTSTMSG1	Test Msg 1
EQTSTMSG2	Test Msg 2
EQTSTMSG3	Test Msg 3
EQTSTMSG4	Test Msg 4
EQTSTMSG5	Test Msg 5
EQTSTMSG6	Test Msg 6
EQTSTMSG7	Test Msg 7
EQTSTMULT1	Test Multiply 1
EQTSTPAREN1	Test Paren 1
EQTSTPRECED1	Test Operator Precedence 1

<b>Equation Name</b>	<b>Description</b>
EQTSTRETN1	Test Return 1
EQTSTRETN2	Test Return 2
EQTSTROUND1	Test Rounding 1
EQTSTSTEM1	Test Stem 1
EQTSTSTEM2	Test Stem 2
EQTSTSTEM3	Test Stem 3
EQTSTSTEM4	Test Stem 4
EQTSTSUB1	Test Subtract 1

### **FACE\* — CommonLine Delivered Edits**

<b>Equation Name</b>	<b>Description</b>
FACEDDELERRS	Delete Old Loan Edit Errors
FACEDGET1ST	Get First Run Control Info
FACEDGETCATG	Get Dest Category
FACEDGETCLPN	Get CL Pnote
FACEDGETDEST	Get Loan Dest Edit Data
FACEDGETORIG	Get Loan Origination Data
FACEDGETTYPE	Get Loan Type Data
FACEDLOGERR	Log Loan Edit Errors
FACEDUPDSTAT	Update Loan Action Status

### **FACL\* — CommonLine Delivered Edits**

<b>Equation Name</b>	<b>Description</b>
FACLOANEDITS	Fin Aid Loan Edits
FACLOANONEUP	One Up CRC Loan Validation



**FACR\* — Common Record CommonLine Delivered Edits**

<b>Equation Name</b>	<b>Description</b>
FACRADDR01	Permanent address missing
FACRADDR02	Mailing address missing
FACRADDR03	Borrower perm address missing
FACRADDR04	Borrower mailing addr missing
FACRBORROW01	Borrower missing
FACRCHNG01	Loan incr w/undisbursed check
FACRCOSIGN01	Cosigners Required
FACRCOSIGN02	Cosigner Signatures Required
FACRDEBT01	Total Loan Debt Missing
FACRDEPSTAT1	Dependency stat missing
FACRDEST01	Loan Dest Nbr is Zero
FACRDISBDT01	Disb 91 days after Ln Per End
FACRDISBDT02	Ln Per Strt - Disb Dt > 13
FACRDISBDT03	Disb dts require chron order
FACRDRVLIC01	Borrower DL or state missing
FACRGRADDT01	Grad dt before Loan End dt
FACRHOLDFED1	Disbursement Hold on Fed Aid
FACRNAME01	Student name missing
FACRNAME02	Borrower name missing
FACRPER01	Loan Per gt 1 Yr
FACRPLUS01 PLUS borr/stdnt SSN	same
FACRPLUS02	No PLUS for grad student
FACRPLUSMPN	Serial PLUS MPN Check

<b>Equation Name</b>	<b>Description</b>
FACRREFS01	References Required
FACRSRVCIN01	Service Indicators Exist
FACRSSN01	Borrower SSN is blank
FACRSSN02	Student SSN is blank

**FAED\* — CommonLine 4 Delivered Edits**

<b>Equation Name</b>	<b>Description</b>
FAEDADDR01	Permanent address missing
FAEDADDR02	Mailing address missing
FAEDADDR03	Borrower perm address missing
FAEDADDR04	Borrower mailing addr missing
FAEDBORROW01	Borrower missing
FAEDCHNG01	Loan incr w/undisbursed check
FAEDCOSIGN01	Cosigners Required
FAEDCOSIGN02	Cosigner Signatures Required
FAEDDEBT01	Total Loan Debt Missing
FAEDDEPSTAT1	Dependency stat missing
FAEDDEST01	Loan Dest Nbr is Zero
FAEDDISBDT01 Disb	91 days after Ln Per End
FAEDDISBDT02	Ln Per Strt - Disb Dt > 13
FAEDDISBDT03	Disb dts require chron order
FAEDDRVLIC01	Borrower DL or state missing
FAEDGRADDT01	Grad dt before Loan End dt
FAEDNAME01	Student name missing
FAEDNAME02	Borrower name missing

<b>Equation Name</b>	<b>Description</b>
FAEDPER01	Loan Per gt 1 Yr
FAEDPLUS01	PLUS borr/stdnt SSN same
FAEDPLUS02	No PLUS for grad student
FAEDPLUSMPN	Serial PLUS MPN Check
FAEDREFS01	References Required
FAEDSRVCIN01	Service Indicators Exist
FAEDSSN01	Borrower SSN is blank
FAEDSSN02	Student SSN is blank

***FAHD\* — Hold and Release Delivered Edits***

<b>Equation Name</b>	<b>Description</b>
FAHDLOADLVL	Load Level Status Check
FAHDSAPSTAT	Satisfactory Academic Progress

***FALTR\*— Forms Engine FAN Delivered Equations***

<b>Equation Name</b>	<b>Description</b>
FANLTRDTRANG	Award Ltrs within a date range
FANLTRNONEED	No Need
FANLTRSCHONL	Scholarship Only
FANLTRSEL	Award Ltr Selection Criteria

***FA\_CRC\* — CRC Loan Edits Delivered Edits***

<b>Equation Name</b>	<b>Description</b>
FA_CRCEDITS	FA CRC Loan Edits

***FA\_\* — CommonLine Delivered Edits***

<b>Equation Name</b>	<b>Description</b>
FACEDDELERRS	Delete Old Loan Edit Errors
FACEDGET1ST	Get First Run Control Info
FACEDGETCATG	Get Dest Category
FACEDGETCLPN	Get CL Pnote
FACEDGETDEST	Get Loan Dest Edit Data
FACEDGETORIG	Get Loan Origination Data
FACEDGETTYPE	Get Loan Type Data
FACEDLOGERR	Log Loan Edit Errors
FACEDUPDSTAT	Update Loan Action Status
FA_LOANEDITS	Fin Aid Loan Edits

### **FAPK\* — Packaging System Equations**

<b>Equation Name</b>	<b>Description</b>
FAPKAFDCPAR	Set global AFDC_PAR
FAPKAFDCSTU	Set global AFDC_STU
FAPKAGIPAR	Set global AGI_PAR
FAPKAGISTU	Set global AGI_STU
FAPKCHLSPPAR	Set global CHILD_SUPPORT_PAR
FAPKDEPENDST	Set global DEPNDNCY_STAT
FAPKDEPDNTS	Set global DEPENDENTS
FAPKDTAPPREC	Set global DT_APP_RECEIVED
FAPKERNINPAR	Set global ERND_INC_CRED_PAR
FAPKEXEMPT	Set global NUM_EXEMPTIONS
FAPKEXEMPTPR	Set global NUM_EXEMPTIONS_PAR
FAPKGDATASRC	Get Packaging Data Source

<b>Equation Name</b>	<b>Description</b>
FAPKLEGALRES	Set global LEGAL_RESIDENCE
FAPKMARSTPAR	Set global MARITAL_STAT_PAR
FAPKMAR_STAT	Set global MARITAL_STAT
FAPKMONVETBN	Set global MONTHLY_VET_BEN
FAPKNMFAMMEM	Set global NUM_FAMILY_MEMBERS
FAPKNMINCOLL	Set global NUMBER_IN_COLLEGE
FAPKNMMNVTBN	Set global NUM_MONTH_VET_BEN
FAPKNUMINCOL	Set global NUM_IN_COLLEGE
FAPKNUMINFAM	Set global NUMBER_IN_FAMILY
FAPKORPHAN	Set global ORPHAN
FAPKRDINSTCT	Read INST_CONTROL
FAPKRDINSTIN	Read INST_INTERPRET
FAPKRDINSTPR	Read Inst Parent
FAPKRDINSTST	Read Inst Student
FAPKRDISIRCT	Read ISIR_CONTROL
FAPKRDISIRPR	Read Isir Parent
FAPKRDISIRST	Read Isir Student
FAPKSPERNINC	Set global SPS_EARNED_INCOME
FAPKSSBENPAR	Set global SS_BENEFIT_PAR
FAPKSSBENSTU	Set global SS_BENEFIT_STU
FAPKSTATERES	Get State Residence
FAPKSTERNINC	Set global STD_EARNED_INCOME
FAPKTOTWKAP	Set global TOTAL_FROM_WKA_P
FAPKUNTAXIN	Set global UNTAXED_INC
FAPKUNTAXINP	Set global UNTAXED_INC_PAR

<b>Equation Name</b>	<b>Description</b>
FAPKVETERAN	Set global VETERAN

### **FAPD\* — Packaging Demo Equations**

Oracle strongly recommends that you not modify these equations. You can clone them to use a basis for your own similar equations.

<b>Equation Name</b>	<b>Description</b>
FAPDADJPCONT	Stored Value ADJ_PAR_CONTRIB
FAPDANNLOAD	Annual Load 1
FAPDANNLOAD2	Annual_Load 2
FAPDANNLOAD3	Annual Load 3
FAPDAPP_DATE	If Then Example DT_APP_RECEIVED
FAPDCLCIFAGI	Calc Variables based on AGI
FAPDCLCTLEFC	Calculate Award based on EFC
FAPDDEPENDNT	Dependent Students
FAPDDEPNANTS	Dependents
FAPDDL_STATE	Award based on License State
FAPDDOBPRIOR	If Then Example of DOB_PRIOR
FAPDEARLYADM	If Then Else Example EARLY_ADM
FAPDEFC3000	Award based on FED_EFC <= 3000
FAPDEFC4000	Award based on FED_EFC <= 4000
FAPDEFC6000	Award based on FED_EFC > 6000
FAPDEFCBOTH	Handles Both Award Periods
FAPDEFC_STAT	If Then Example of EFC STAT
FAPDFROSH	Award based on Freshman level
FAPDGAPBDGT1	Gap_Bdgt#1
FAPDGAPBDGT2	Gap_Bdgt#2

<b>Equation Name</b>	<b>Description</b>
FAPDGRADELVL	Award based on NSLDS_LOAN_YEAR
FAPDGRADS	GRADUATES
FAPDHIGHEFC	Award where FED_EFC >= 10,000
FAPDINDPNDNT	Independent
FAPDJMET5000	Select if Unmet Need >= 5,000
FAPDLASTAWRD	Last Award
FAPDMDLABRAT	Award based on VARIABLE_FLAG7
FAPDMDSPCLTY	Award based on VARIABLE_CHAR3
FAPDMDTSTSCR	Award using VARIABLE_NUM5
FAPDPELLELIG	Select Pell Eligible Candidate
FAPDPELL_ELG	Pell Eligibility Flag Example
FAPDPLUS_INT	Example: Interest in PLUS Loan
FAPDPRIM_EFC	Stored Val Example Primary EFC
FAPDPRJYRINC	If Then Example on PROJ_YR_INC
FAPDP_AFDC	Stored Value of Parents' AFDC
FAPDP_AGI	Stored Value of PAR_AGI
FAPDP_IM#COL	Inst Parent Number in College
FAPDP_IM_AGI	Inst Parent Number in College
FAPDP_MARSTT	If Then using MARITAL_STAT_PAR
FAPDP_NMCOLL	If Then: PAR NUM_IN_COLLEGE
FAPDP_WORK1	Parent 2005 ISIR WORKSHEET_A
FAPDP_WORK2	Parent 2005 ISIR WORKSHEET_B
FAPDP_WORK3	Parent 2005 ISIR WORKSHEET_C
FAPDREMNEED1	Remaining Need 1
FAPDREMNEED2	Remaining Need 2

<b>Equation Name</b>	<b>Description</b>
FAPDREMNEED3	Remaining Need 3
FAPDROUNDAWD	Round A_AMOUNT
FAPDRUNGAWDS	Running TOTAL AWD AMT
FAPDSEC_EFC	Stored Value of SECONDARY_EFC
FAPDSPS_ERND	Stored Value of SPS_EARNED_INC
FAPDSSA_CITZ	If Then: SSA_CITIZENSHIP_IND
FAPDS_AFDC	Stored Value: AFDC_STU
FAPDS_AGI	Stored Value: AGI_STU
FAPDS_CHLSUP	Store Value CHILD_SUPPORT_RCVD
FAPDS_DEP_ST	If Then Example DEPNDNCY_STAT
FAPDS_EARNED	Stored Val: STD_EARNED_INCOME
FAPDS_IM_AGI	Award using IM Student AGI
FAPDS_IM_INC	Inst Student Income
FAPDS_MARRD	If Then Example of STU MARRIED
FAPDS_MAR_ST	If Then Example MARITAL_STAT
FAPDS_NUMCOL	If Then STU NUMBER_IN_COLLEGE
FAPDS_NUMFAM	If Then STU NUM_FAMILY_MEMBERS
FAPDS_ORPHAN	If Then And Example of ORPHAN
FAPDS_ST_SEL	If Then Example STATE_AGENCY_RLS
FAPDS_VA_BEN	Stored Value MONTHLY_VET_BEN
FAPDS_VETERN	If Then Example VETERAN status
FAPDS_WORK1	STUDENT_WORKSHEET_A
FAPDS_WORK2	STUDENT_WORKSHEET_B
FAPDS_WORK3	STUDENT_WORKSHEET_C
FAPDTGTRMNED	Award using I_TRGT_FED_RMNEED



<b>Equation Name</b>	<b>Description</b>
FAPDTIV_ELIG	If Then Example: TITLEIV_ELIG
FAPDTOTALINC	Stored Value of TOTAL_INCOME
FAPDTOTPRCNT	Stored Value TOTAL_PAR_CONTRIB
FAPDTOTSCONT	Stored Value TOTAL_STU_CONTRIB
FAPDTRANS_DT	Award using TRANS_PROCESS_DT
FAPDUGRADS	UNDERGRADS
FAPDUMET1000	Select FED_RMNEED >= 10,000
FAPDUNGRADS	Undergraduates
FAPDVALIDEFC	Award using VALID_EFC_CALC
FAPDVGAPAWRD	VGAP Award Amount
FAPDVIRGNRES	If Then: STATE_RESIDENCE = VA
FAPD_APPDATE	IF THEN DATE > 2003/01/01
FAPD_IM_#COL	Award using Stu Nbr in College

### **SFTD\* — SF Tuition Calculation Delivered Equations**

<b>Equation Name</b>	<b>Description</b>
SFTDBILLUNIT	Billing Units
SFTDCSSTDYFE	Case Study Fees
SFTDMDLABRAT	Medical School Laboratory Fees
SFTDMDSCTUIT	Medical School Tuition
SFTDMDSPECLT	Medical Speciality
SFTDMDTESTSC	Medical School Test Scores
SFTDRSRCHFEE	Research Project Fees
SFTDUGRAD	Undergraduate
SFTDUGRDAMT	SF UGRD Pay Amount

<b>Equation Name</b>	<b>Description</b>
SFTDUGRDSEL	SF UGRD Select
SFTDTFTRMTRM	Term Fee Charge by Term Adjust by Term
SFTDTFTRMSES	Term Fee Charge by Term Adjust by Session
SFTDTFTRMCLS	Term Fee Charge by Term Adjust by Class
SFTDTFSESTRM	Term Fee Charge by Session Adjust by Term
SFTDTFSECLS	Term Fee Charge by Session Adjust by Class
SFTDCLSTRM	Term Fee Charge by Class Adjust by Term
SFTDCLASSNBR	Class Fee A_Amount
SFTDCLSSEL	Class Fee A_Select
SFTDCOURSEID	Course ID A_Amount
SFTDCLSWVR	Course Fee A_Amount Negative

## Viewing Sample Equations

This section discusses the syntax of sample equations delivered by Oracle.

You can view any equation that Oracle delivers on the Equation Editor page (Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

## Loan Validation Edit Equation

This is a loan validation edit that checks whether the borrower has been defined on the loan origination table.

<b>Line Number</b>	<b>Equation Keyword</b>	<b>Operand Type</b>	<b>Operand</b>	<b>Comment</b>
1	SKIP			Borrower Missing
2	ASSIGN	Local Variable	EQUATION_NAME	
3		String	FACRBORROW01	
4	END ASSIGN			
5	CALL	Equation	FACEDGETDEST	

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
6	CALL PARS			
7		Local Variable	EQUATION_NAME	
8	END CALL PARS			
9	IF			
10		Global Variable	DEST_ACTV	
11	<>			
12		String	Y	Edit not active
13	THEN			
14	RETURN			
15	END IF			
16	IF			
17		Table	LOAN_ORIGNATN	
18		Field	BORR_EMPLID	
19	=			
20		String		
21	THEN			
22	CALL	Equation	FACEDLOGERR	
23	CALL PARS			
24		Local Variable	EQUATION_NAME	
25	END CALL PARS			
26	END IF			
27	RETURN			

## Satisfactory Academic Progress Equation

This is a hold/release demonstration equation to verify satisfactory academic progress for a student.

<b>Line Number</b>	<b>Equation Keyword</b>	<b>Operand Type</b>	<b>Operand</b>	<b>Comment</b>
1	SKIP			Satisfactory Academic Progress Check
2	FIND FIRST	Local Variable	FOUND_STDNT_AID_ATRBT	
3		Table	STDNT_AID_ATRBT	
4		Keyed Global Equal	EMPLID	
5		Keyed Global Equal	INSTITUTION	
6		Keyed Global Equal	AID_YEAR	
7		Keyed Global Equal	TABLE_ID	
8	END FIND			
9	IF			
10	NOT			
11		Local Variable	FOUND_STDNT_AID_ATRBT	
12	Then			
13	Message	String	No row in STDNT_AID_ATRBT	
14		String	for key values	
15		Global Variables	EMPLID	
16		Global Variable	INSTITUTION	
17		Global Variable	AID_YEAR	
18		Global Variable	TABLE_ID	
19	END MESSAGE			
20	ASSIGN	Global Variable	RESULT	
21		String	FAILED	
22	END ASSIGN			

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
23	ASSIGN	Global Variable	HR_MSG_SET_NBR	
24		String	14432	
25	END ASSIGN			
26	ASSIGN	Global Variable	HR_MSG_NBR	
27		String	00001	
28	END ASSIGN			
29	RETURN			
30	END IF			
31	IF			
32		Table	STDNT_AID_ATTRB T	
33		Field	SAT_ACADEMIC_P RG	
34	=			
35		Prompted Value	Y	
36	OR			
37		Table	STDNT_AID_ATTRB T	
38		Field	SAT_ACADEMIC_P RG	
39	=			
40		Prompted Value	P	
41	THEN			
42	ASSIGN	Global Variable	RESULT	
43		String	PASS	
44	END ASSIGN			

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
45	ELSE			
46	ASSIGN	Global Variable	HR_MSG_SET_NBR	
47		String	14432	
48	END ASSIGN			
49	ASSIGN	Global Variable	HR_MSG_NBR	
50		String	00002	
51	END ASSIGN			
52	ASSIGN	Global Variable	RESULT	
53		String	FAILED	
54	END ASSIGN			
55	END IF			

## Undergraduate Status Equation

This is a packaging selection equation that checks for undergraduate status.

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
1	IF			
2		Global Variable	ACAD_CAREER	
3	=			
4		String	UGRD	
5	THEN			
6	ASSIGN	Global Variable	A_SELECT	
7		String	T	
8	END ASSIGN			
9	ELSE			

<i>Line Number</i>	<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>	<i>Comment</i>
10	ASSIGN	Global Variable	A_SELECT	
11		String	F	
12	END ASSIGN			
13	END IF			





## Chapter 26

# Introducing Customer Relationship Management for Higher Education

This chapter provides an overview of PeopleSoft Customer Relationship Management for Higher Education (CRM for Higher Ed) and discusses how to:

- Enable integration with CRM for Higher Ed.
- Configure the CRM 360-degree view.

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**Note.** CRM for Higher Ed is an extensive feature. To fully understand the functionality, it is important to read the identified CRM PeopleBook sections and the related Developer's Guide.

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### **See Also**

*PeopleSoft CRM for Higher Education PeopleBook*

*CRM for Higher Education Developer's Guide*

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## Understanding CRM for Higher Ed

The PeopleSoft CRM for Higher Education 9.1 release deeply integrates with Campus Solutions for best practice recruitment and retention business process flows, and shares and transfers data between the two systems. This new feature extends the ability to utilize Campus Solutions (CS) and PeopleSoft CRM together to improve institution goals in recruiting and retention. CRM for Higher Ed functionality primarily impacts three areas within CS:

- Prospective student recruiting, including test score processing.

See *PeopleSoft CRM for Higher Education PeopleBook*, "Recruiting Students"

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Processing External Test Scores."

- Retention

See *PeopleSoft CRM for Higher Education PeopleBook*, "Retaining Students"

See *PeopleSoft CRM for Higher Education PeopleBook*, "Service Center for Higher Education"

- The 360-degree view of constituent records and constituent support services.

See *PeopleSoft CRM for Higher Education PeopleBook*, "Working with the 360-Degree View"

CRM uses CS Search/Match functionality to look for suspect and prospect records, so that your institution can identify and resolve any potential duplicate records. CRM then updates the records as applicants. CRM also respects CS user security; if a user ID is the same in both CRM and CS, then access is the same in both systems.

Some CS setup is required, to enable interaction with CRM for Higher Ed, on the Student Admin Installation and Configure Integrations components. Additional PeopleTools setup and configuration is also required in Integration Broker to define the services and messaging that facilitate information sharing between the two systems. The CS and CRM systems must be connected and synchronized to enable CRM for Higher Ed to function properly. The *CRM for Higher Education Developer's Guide* contains detailed information on setting up Integration Broker.

---

**Important!** Your system must have PeopleTools release 8.5 installed to properly use CRM for Higher Ed functionality.

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## Enabling Integration with CRM for Higher Ed

This section discusses how to:

- Enable CRM for Higher Ed integration.
- Exchange data using enterprise integration points (EIPs).

### Page Used to Enable CRM for Higher Ed

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	Enable integration with CRM for Higher Education functionality.

### Enabling CRM for Higher Ed Integration

Access the SA Features page.

Installation Student Admin	SA Features
<b>Installation Student Administration</b>	
<b>CRM Integration</b>	
<input checked="" type="checkbox"/> CRM for Higher Education	
<b>Australia</b>	
<input checked="" type="checkbox"/> DEST, HECS, Centrelink, TAC	Last CART Request ID: <input type="text" value="0"/>
<b>Canada</b>	
<input checked="" type="checkbox"/> Government Reporting	<input checked="" type="checkbox"/> OUAC
<b>New Zealand</b>	
<input checked="" type="checkbox"/> NSI and SDR Personal Data, SDR Degree	
<b>The Netherlands</b>	
<input type="checkbox"/> Use Dutch Functionality	
<b>United Kingdom</b>	
<input checked="" type="checkbox"/> HESA, UCAS	

SA Features page

If CRM and Campus Solutions are both licensed at your institution, select the CRM for Higher Education check box to enable CS and CRM to share data in real time.

Further setup for messaging is addressed in the *CRM for Higher Education Developer's Guide*.

## Exchanging Data Using EIPs

This section provides an overview of EIPs for messaging between CS and CRM, as well as business process flows.

### ***Understanding EIPs***

When PeopleSoft CRM for Higher Education 9.1 is enabled, CRM can be the system of record for recruiting and retention. This functionality provides recruiters with a wide variety of data about suspects, prospects, and applicants. When there is a change in lifecycle data for a student in CS, that data change needs to be reflected in CRM as well. EIPs enable your institution to exchange data between CS and CRM. EIPs publish data either whenever data updating happens for the given entities of the EIPs or when the user requests data. This data can be created, updated, or deleted through various channels like components, component interfaces, and batch processes.

EIPs follow an asynchronous model. The systems simply send messages, without expecting any acknowledgement. Messages are activated and configured using Integration Broker. The *CRM for Higher Education Developer's Guide* contains detailed information on activating messages for Integration Broker.

See *CRM for Higher Education Developer's Guide*

### **Delivered EIPs**

There are two steps to using EIPs. Before your system can use them, your institution must have data set up within CS (such as academic structure, terms, types, test IDs) and must also implement role-based security for programs and plans. EIPs bring this data into CRM. Then, your system can trigger EIP messages, which CRM then subscribes to and populates the tables within the CRM system that hold that data. All EIP messages send data from CS to CRM, except for SAD\_TEST\_SCORES\_SYNC, which is a bidirectional message.

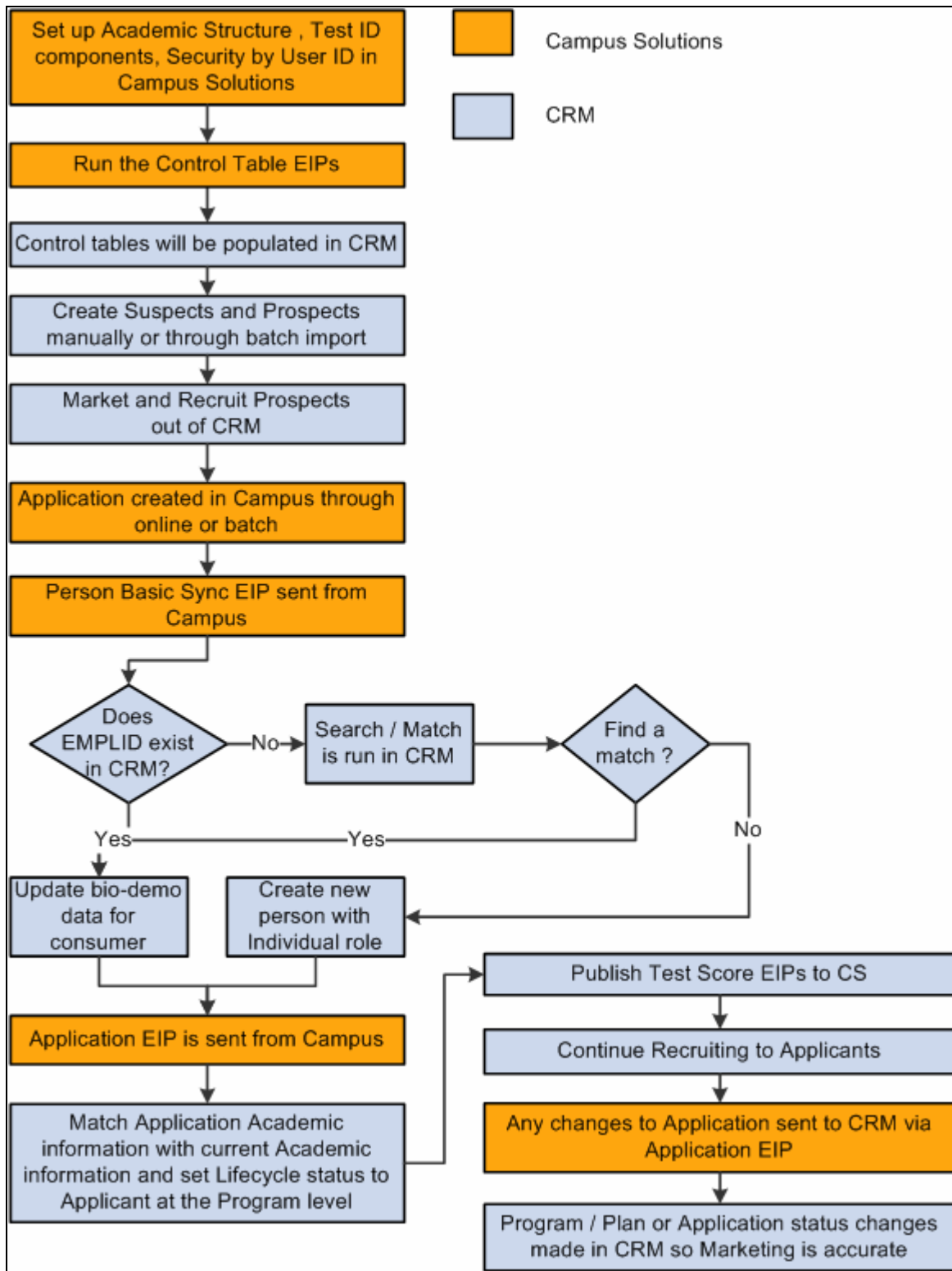
When triggered, control table EIP messages populate setup tables in CRM and then populate pages with the same data setup in CS. After the control table data is in CRM, users can then create prospects. Note that prospect, applicant, and student data EIPs are designated *sync* or *fullsync*. Fullsync EIPs republish all the data in their source records at once. Incremental sync EIPs send real-time sync messages; as soon as you make a change in CS, the system triggers the sync and sends only the changed information to PeopleSoft CRM. EIPs can be published in batch mode or online mode. Batch mode is used when an Application Engine, SQR, or COBOL process updates many records; online mode is used when ad hoc updates are made to a particular record.

The *CRM for Higher Education Developer's Guide* contains detailed information on all delivered EIPs and web services.

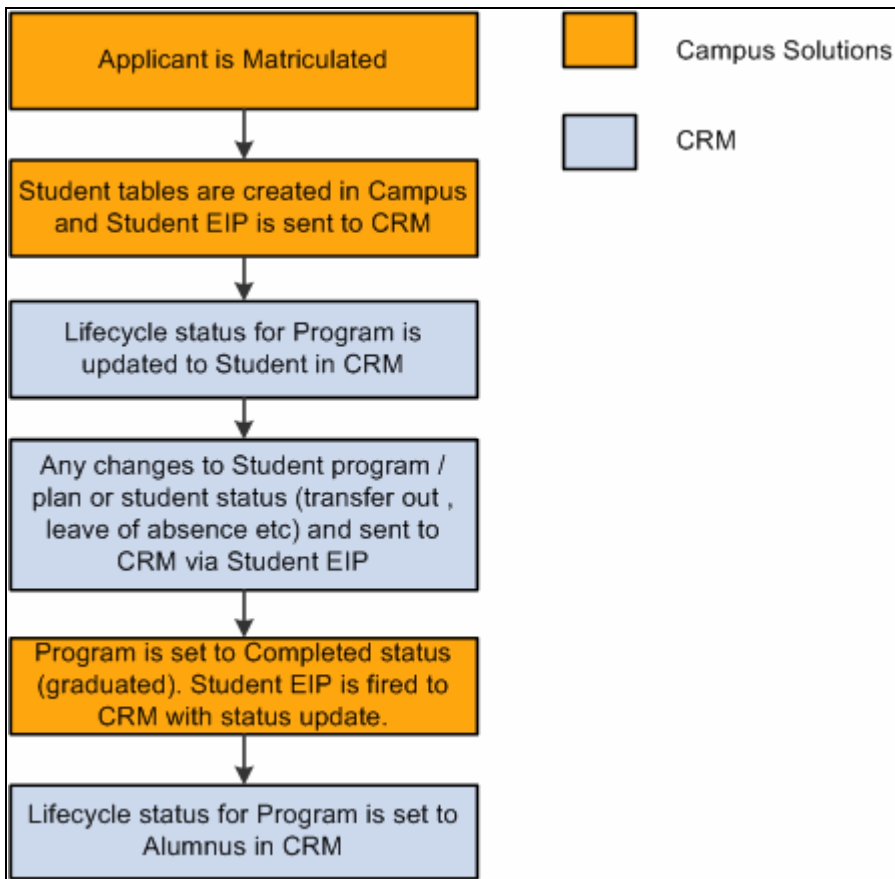
See *CRM for Higher Education Developer's Guide*

### **Business Process Flow Examples**

The following graphics illustrate two examples of an EIP sequence as the messages move data between CS and CRM:



Example of message flow for Suspect to Applicant



Example of message flow from Applicant to Alumnus

## Configuring the CRM 360-Degree View

This section provides an overview of the 360-degree constituent view and its security, lists prerequisites, and discusses how to:

- Configure Campus Community data filters.
- Configure Financial Aid data filters.
- Configure Contributor Relations data filters.
- Review configuration scenarios.

## Understanding the CRM 360-Degree Constituent View

The CRM 360-Degree View component displays summary information that enables generalists and specialists to solve the higher education issues reported by constituents. In addition, the functionality enables a holistic, actionable view of the constituent that combines CRM and CS data in real time and is configurable depending on the role (marketer, recruiter, advisor, and so on) of the user who is accessing the component. CS provides this summary information through Integration Broker services. These services call the core CS system and respond to CRM with an aggregation of data that populates the following Higher Education sections of the 360 Degree View:

- Biodemographic Information
- 3C's - Interactions
- Recruiting
- Admissions
- Transfer credits
- Academics
- Finances
- Financial aid
- Transcript requests
- Contributor Relations
- Affiliations

See *PeopleSoft CRM for Higher Education PeopleBook*, See the "Working with the 360-Degree View"

The system uses an aggregation web service (SCC\_CONSTITUENT - SCC\_CONSTITUENT\_READ360SUMMARY) to populate the 360-degree view. When CRM sends a request for constituent information, CS generates 12 local requests to gather data for each section of the 360-degree view and feeds that data to the aggregation service, which then sends a single populated message back to CRM based on the user's security access in both CS and CRM. This process follows a synchronous model; the message and response is processed in real time, using request handlers that are configured on the Request Handlers page.

When the system runs PERSON\_BASIC\_SYNC, it creates a record in CRM for every constituent with an EMPLID in CS. The CRM consumer role is needed to access certain CRM constituent information for an ID. For constituents who did not complete the standard student life cycle, a consumer role may not have been created. For example, a donor who never attended as a student will have an ID created in CRM during the sync, but no role will be assigned. To assign the consumer role to an individual in CRM, see the *PeopleBook PeopleSoft CRM Business Object Management PeopleBook*, "Defining Person Business Objects," Viewing and Updating Primary Person Information. Once you have added the consumer role to an ID, the ID appears in search results for components like the Constituent 360 Degree View.

## Understanding Security

In the 360-degree constituent view pages, the CRM system honors CS security settings. For example, if a user chooses to view Financial Aid information but he does not have underlying access to the CS functional area, the data will not appear. For users to view all areas of the Higher Education Information portions of the 360-Degree View, they must have security access to the pages and components that feed the section. The following table describes how the information that is passed to CRM can be controlled:

<b>Section Name</b>	<b>Section Display Secured by</b>
Constituent Summary	Academic Institution Security
Checklists/Communications/Comments	3C Group Security
Recruiting	CRM system security
Admissions	Application Center Security
Transfer Credits	No row-level security view applied
Academics	Academic Institution Security, Institution/Campus Security, Institution/Career Security, Academic Program Security, Plan settings
Transcript Requests	Academic Institution Security, Transcript Type Security
Student Financials	Business Unit security
Financial Aid	Academic Institution Security, Security Views
Contributor Relations	Academic Institution Security, CR Business Unit Security
Affiliations	Academic Institution Security

In addition, Security View settings for each request handler defined on the Request Handlers page affect a user's view.

### **Understanding Request Handlers**

CS system request handlers have a significant impact on the security of many components in the 360-Degree View, because they enable the setting of particular security views. There is one overall, externally available request handler for the "aggregation service" (SCC\_CONSTITUENT), and then each of the components has its own internal request handler. This service interacts with CRM and serves as the front end to all the others, which gather the information for CRM internally in CS. Request handlers are defined on the Request Handlers page (Set Up SACR, System Administration, Integrations, Request Handlers). The *CRM for Higher Education Developer's Guide* contains more complete details about security.



## Prerequisites

Setup is required in both the CS and CRM systems to enable the CRM 360-degree view. The *PeopleSoft CRM for Higher Education PeopleBook* documents CRM setup requirements. Within the CS system, you must enable CRM integration on the SA Features page and set up data filtering parameters using the Configure Integrations component.

## Pages Used to Configure the 360-Degree View

Page Name	Definition Name	Navigation	Usage
Configure Integrations - Campus Community	SCC_WSC_COMMUN	Set Up SACR, System Administration, Integrations, Configure Integrations, Campus Community	Define or limit the Campus Community data to be picked from CS for displaying in the CRM 360-degree view.
Configure Integrations - Financial Aid	SCC_WSC_FINANC	Set Up SACR, System Administration, Integrations, Configure Integrations, Financial Aid	Define or limit the Financial Aid data to be picked from CS for displaying in the CRM 360-degree view.
Configure Integrations - Contributor Relations	SCC_WSC_FINANC	Set Up SACR, System Administration, Integrations, Configure Integrations, Financial Aid	Define or limit the Contributor Relations data to be picked from CS for displaying in the CRM 360-degree view.

## Configuring Campus Community Data Filters

Access the Campus Community page.

Campus Community
Financial Aid
Contributor Relations

**Contact Method Usage**

<b>Address</b>	<input type="text" value="SLCT ORD 1"/>	
<b>Email</b>	<input type="text" value="SLCT ORD 1"/>	
<b>Phone</b>	<input type="text" value="SAIP PHONE"/>	

**Checklists/Communications/Comments**

Include All

Include previous month(s)

Campus Community page

The fields on this page enable you to define the data that should be included in the EIPs that populate the Summary portion of the CRM 360-degree view.

**Contact Method Usage**

The Address, Email, and Phone fields define the order in which the system searches for and uses the associated data. Address and phone usage settings are defined on the Address Usage and Phone Usage pages in PeopleSoft Campus Community.

**Checklists/Communications/Comments**

A large volume of data pertaining to 3Cs may be available. Use these options to limit the data that should be sent to populate the CRM 360-degree view. You can either Include All data or data for the past few months. By entering a value for Include previous month(s), such as 3, you limit the 3C data to the past 3 months. Three months is the recommended 3C period to avoid potential data relevance and performance issues; however, your institution should adjust this period according to its business processes.

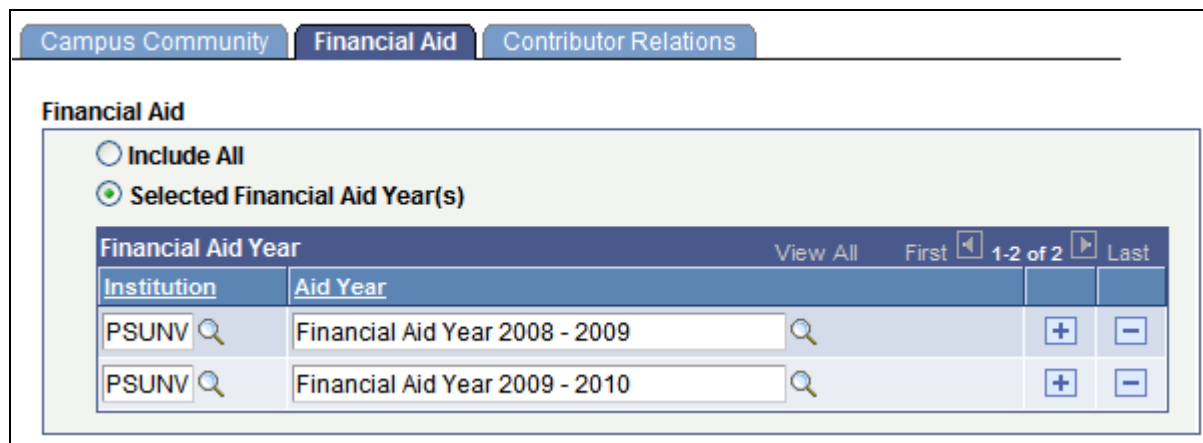
**See Also**

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Address Usages*

*PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Phone Usages*

**Configuring Financial Aid Data Integration**

Access the Financial Aid page.



Financial Aid page

The fields on this page enable you to define the data that should be included in the EIPs that populate the Financial Aid portion of the CRM 360-degree view. That page displays one aid year at a time in the grid, and lists the current aid year first.

Select the option to Include All financial aid year data for a person in the message sent to CRM 360-degree view, or only data from Selected Financial Aid Year(s).

**See Also**

*PeopleSoft Financial Aid 9.0 PeopleBook*, "Setting Up Your Financial Aid Awarding Cycle," Establishing Aid Years

**Configuring Contributor Relations Data Integration**

Access the Contributor Relations page

Contributor Relations page

The fields on this page enable you to define Person/Org Relationship data that should be included in the EIPs that populate the Contributor Relations portion of the CRM 360-degree view. That part of the 360-degree view displays all summarized giving information for the relationship.

It is possible that a constituent may have relationships with other persons and organizations, and the default value on this page is to Include All Relationships. However, your institution may not want to include every relationship in the CRM 360-degree view. So, select a relationship option to define what relationships are applicable to be sent to CRM. If you choose Selected Relationship(s), then you must select the ID Type and Person Description for each selected relationship. Only those relationships selected here will be applicable for sending across to CRM 360-degree view. Selecting pertinent relationships only, such as parents or spouse, is recommended.

**See Also**

*PeopleSoft Contributor Relations 9.0 PeopleBook*, "Managing Constituent Data," Establishing Relationships

**Reviewing Configuration Scenarios**

This section provides examples and sample step-by-step procedures for enabling and configuring:

- 360-degree view.
- EIPs.
- Test score post.

### Configuring the 360-Degree View

To set up services filter data:

1. Select Set Up SACR, System Administration, Integrations, Configure Integrations.
2. In the Contact Method Usage group box , Address field, select *ADDR LAND*.
3. In the Email field, select *LAND&EMAIL*.
4. In the Phone field, select *SAIP PHONE*.
5. In the Checklists/Communications/Comments check box, select the *Include Previous Months* option and enter 3 in the adjacent box.

The screenshot shows a configuration window with three tabs: 'Campus Community', 'Financial Aid', and 'Contributor Relations'. The 'Campus Community' tab is active. Under the 'Contact Method Usage' section, there are three dropdown menus: 'Address' (ADDR LAND), 'Email' (LAND&EMAIL), and 'Phone' (SAIP PHONE). Below this, the 'Checklists/Communications/Comments' section has two radio buttons: 'Include All' (unselected) and 'Include previous month(s)' (selected). Next to the selected option is a text input field containing the number '3'.

Example of Campus Community configuration

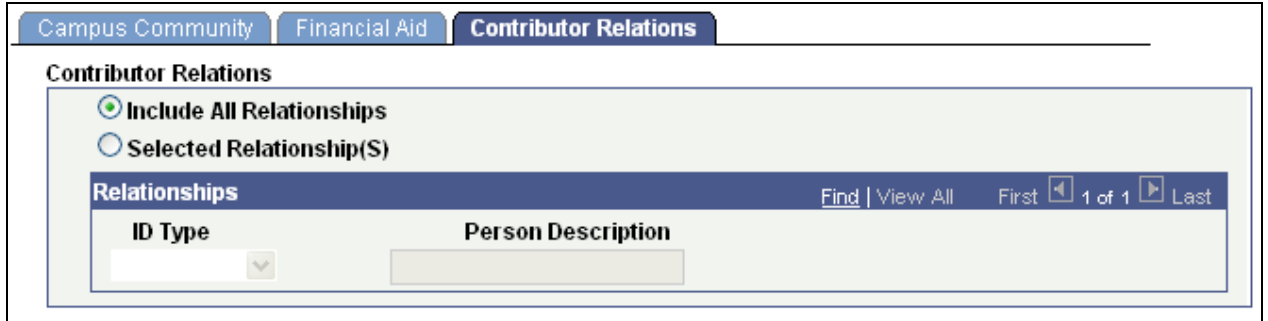
6. Click the Financial Aid tab.
7. In the Financial Aid group box, select the *Include All* option.

The screenshot shows the same configuration window with the 'Financial Aid' tab selected. Under the 'Financial Aid' section, there are two radio buttons: 'Include All' (selected) and 'Selected Financial Aid Year(s)' (unselected). Below the radio buttons is a table with the title 'Financial Aid Year'. The table has two columns: 'Institution' and 'Aid Year'. The table is currently empty. To the right of the table, there are navigation controls: 'View All', 'First', '1 of 1', and 'Last'.

Example of Financial Aid configuration

8. Click the Contributor Relations tab.

- In the Contributor Relations group box, select the *Include All* option.



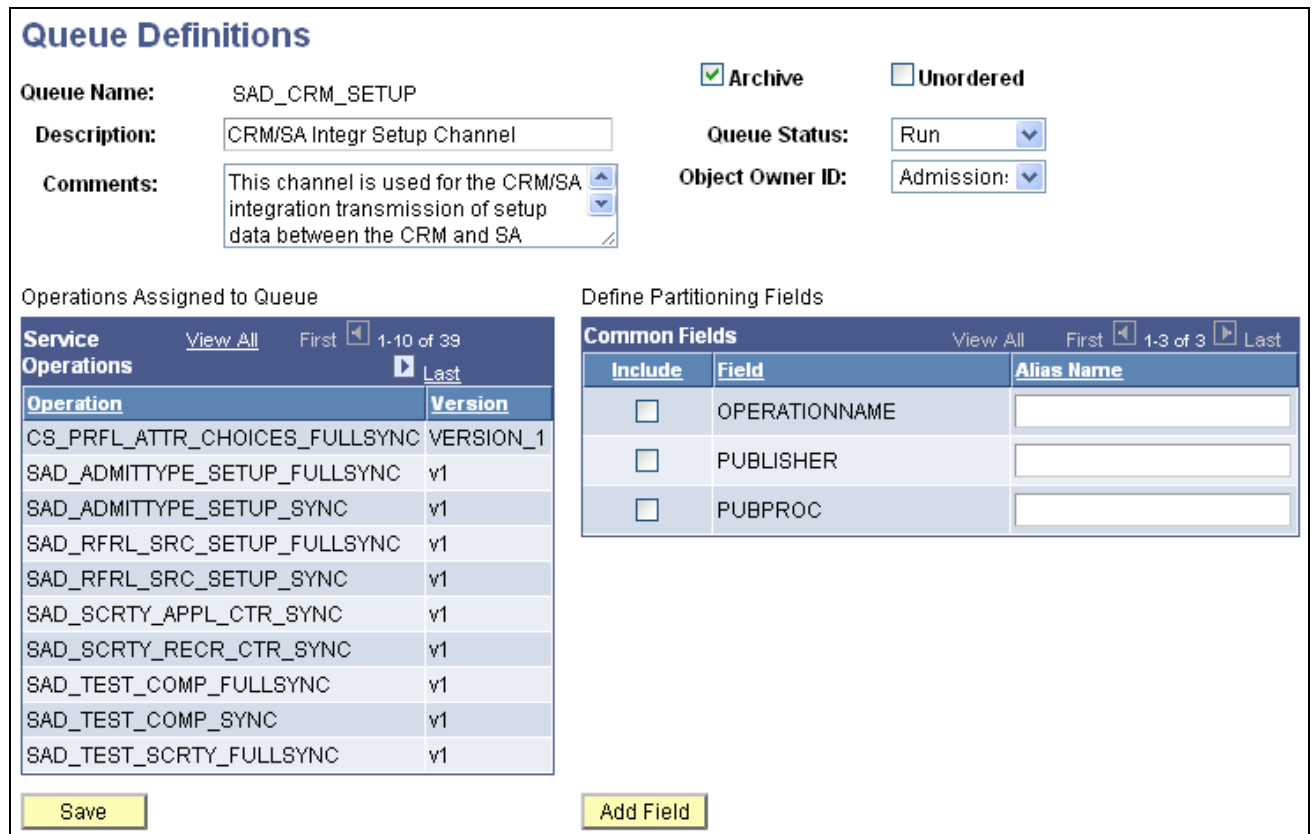
Example of Contributor Relations configuration

- Click the Save button.

### Configuring EIPs

To set up queues:

- Select PeopleTools, Integration Broker, Integration Setup, Queues.
- Change the Queue Status to *Run* for the following queues, if they are not already set: SAD\_CRM\_SETUP, SAD\_CRM\_DATA, PERSON\_DATA.



Example of setup on Queue Definitions page

## Configuring Test Score Posting

To manually set a node as segment aware and configure a node to handle segmented messages:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Select the CRM node (PSFT\_CR) with which to work and click the Search button.

The Node Definitions page appears.

3. Select the Segment Aware check box.
4. Click the Save button.

The screenshot shows the 'Node Definitions' page for the node 'PSFT\_CR'. The page has a navigation bar with tabs: 'Node Definitions' (selected), 'Connectors', 'Portal', 'WS Security', and 'Routings'. The main content area contains the following fields and options:

- Node Name:** PSFT\_CR
- Description:** PS CRM - Local Node
- Node Type:** PIA (dropdown menu)
- Authentication Option:** None (dropdown menu)
- Default User ID:** PS
- Hub Node:** (empty text box)
- Master Node:** (empty text box)
- Company ID:** (empty text box)
- IB Throttle Threshold:** (empty text box)
- Image Name:** (empty text box)
- Code Set Group Name:** (empty text box)

On the right side, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. Below the main fields, there are two checkboxes: 'Default Local Node' (unchecked), 'Local Node' (unchecked), 'Active Node' (checked), 'Non-Repudiation' (unchecked), and 'Segment Aware' (checked). At the bottom of the page, there are two links: 'Contact/Notes' and 'Properties'.

Example of setup on Node Definitions page

### See Also

*CRM for Higher Education Developer's Guide*

## Appendix A

# Campus Solutions Application Diagnostic Plug-ins

This chapter provides an overview of application diagnostics and lists the diagnostic plug-ins delivered with Campus Solutions 9.0.

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## Understanding Application Diagnostics

PeopleTools Diagnostic Framework provides an interface enabling you to execute queries designed to investigate application problems and present the data in a standardized format that you can then share with PeopleSoft's Global Support Center.

The diagnostic framework provides:

- Dynamic prompting, enabling you to restrict queries and include transactional data.
- Output in XML, in addition to HTML.
- Send functionality, enabling you to send the output directly to the email address of the GSC support analyst working with you.
- Support for rowset retrieval.

Campus Solutions has delivered a number of diagnostic plug-ins, which are product-specific queries, with this release. We will post any plug-ins we develop post-GA on My Oracle Support.

### **See Also**

*PeopleTools PeopleBook: Data Management, "Running Diagnostics with Diagnostic Framework"*

*PeopleSoft HRMS Application Fundamentals PeopleBook, "PeopleSoft HRMS Application Diagnostic Plug-ins"*

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## Delivered Application Diagnostic Campus Solutions Plug-Ins

These tables list the diagnostic plug-ins delivered by product.

### ***Academic Advisement***

<b>Plug-In Name and Description</b>	<b>Required Parameters</b>	<b>Provides a diagnosis of...</b>
SAA_STUDENT_INFO: retrieves all data used to process a DPR for a student.	An employee ID is a required parameter for the diagnostic tool to return valid information.	<p>The SAA_STUDENT_INFO application package retrieves the requirement terms from ACAD_PROG, ACAD_PLAN, and ACAD_SUBPLAN records for a student. It also retrieves the following current records for a student:</p> <ul style="list-style-type: none"> <li>• ACAD_PROG</li> <li>• ACAD_PLAN</li> <li>• ACAD_SUBPLAN</li> <li>• STDNT_ENRL</li> <li>• TRNS_EXTR_VW</li> <li>• TEST_EXTR_VW</li> <li>• OTHR_EXTR_VW</li> </ul> <p>The application package retrieves the following appropriate records for a student:</p> <ul style="list-style-type: none"> <li>• RG_GRP_TBL</li> <li>• RQ_GRP_DETL_TBL</li> <li>• RQ_MAIN_TBL</li> <li>• RQ_LINE_TBL</li> <li>• RQ_LN_DETL_TBL</li> <li>• CLST_MAIN_TBL</li> <li>• CLST_DETL_TBL</li> </ul>

**Campus Community**

<b>Plug-In Name and Description</b>	<b>Required Parameters</b>	<b>Provides a diagnosis of...</b>
SCC_EMPLID_VALIDATN: retrieves all data needed to investigate problems creating a new emplid.	None	<ul style="list-style-type: none"> <li>• Selects MAX Emplid from PERS_DATA_EFFDT.</li> <li>• Selects EMPLID_LAST_EMPL from INSTALLATION.</li> <li>• Counts number of records in PERS_DATA_EFFDT with EMPLID of "NEW".</li> </ul>



<b>Plug-In Name and Description</b>	<b>Required Parameters</b>	<b>Provides a diagnosis of...</b>
<p>SCC_SEVIS_REG_EVENT: retrieves all data needed to investigate problems when registration events don't trigger for SEVIS students.</p>	<p>The following parameters are required for the diagnostic tool to return valid information:</p> <ul style="list-style-type: none"> <li>• EmplID of Student.</li> <li>• SEVIS School ID.</li> <li>• OprID from Batch Submission.</li> <li>• Run Control ID from Batch Submission.</li> </ul>	<ul style="list-style-type: none"> <li>• Queries I20_FORM to verify a records exists and displays "Y" if the value of SEV_FUNDING_VERIFY is "Y".</li> <li>• Queries SEV_MST_ADDR to verify no inactive records for the student.</li> <li>• Queries SEV_MST_ADDR to verify no inactive records for the student.</li> <li>• Queries SEV_MST_REG to verify no inactive records for the student.</li> <li>• Verifies a valid row exists in RUNCTL_CCSEVCMP.</li> <li>• Verifies ASOF_DATE in RUNCTL_CCCMPTRM is less than today's date.</li> <li>• Verifies student has a record in SEV_MST_REG matching the term value in RUNCTL_CCCMPTRM.</li> <li>• Verifies student has a record in STDNT_CAR_TERM matching the term value in RUNCTL_CCCMPTRM.</li> <li>• Verifies student has a record in STDNT_ENRL matching the term value in RUNCTL_CCCMPTRM.</li> </ul>

## **Financial Aid**

<b>Plug-In Name and Description</b>	<b>Required Parameters</b>	<b>Provides a diagnosis of...</b>
<p>SFA_FA_TERM: retrieves all data needed to investigate problems creating new FA-Term records.</p>	<p>These are the parameters required for the diagnostic tool to return valid information.</p> <ul style="list-style-type: none"> <li>• Emplid of Student</li> <li>• Institution</li> <li>• Student Career</li> <li>• Term</li> <li>• Aid Year</li> <li>• Oprid</li> </ul>	<ul style="list-style-type: none"> <li>• Queries against STDNT_CAR_TERM to get FA flags from that record.</li> <li>• Queries against STDNT_CAR_TERM to get FA flags from that record.</li> <li>• Student's aid year activation.</li> <li>• FA Term setup for aid year/career. Queries FATRMP_CAR_TRM to verify the term is defined.</li> <li>• Gets values from FA Term Drivers Setup. Queries RUN_CTL_FATDVRs for values.</li> <li>• Student's admissions and records activation and effective date. Queries STUDENT_AID to verify correct record exists.</li> <li>• Expected student's grad term. Queries ADM_APPL_PROG and ACAD_PROG for the student.</li> <li>• Gets Session Code, Session Code Census Date, FA Term Census Date and FA Term Locked flag.</li> <li>• SESSION_CODE and CENSUS_DT from SESSION_TBL, FA_CENSUS_DATE and LOCK_FATERM from FATRMP_CAR_TRM.</li> <li>• Displays FA_ELIGIBILITY and FA_STATS_CALC_REQ for all records in STDNT_CAR_TERM for the student.</li> <li>• Displays all records in STDNT_FATU_DRV for the student.</li> </ul>

<b>Plug-In Name and Description</b>	<b>Required Parameters</b>	<b>Provides a diagnosis of...</b>
SFA_PKG_DATA: retrieves all data needed to investigate problems creating FA packaging records.	<p>These are the parameters required for the diagnostic tool to return valid information:</p> <ul style="list-style-type: none"> <li>• Emplid of Student</li> <li>• Institution</li> <li>• Student Career</li> <li>• Term</li> <li>• Aid Year</li> <li>• Oprid</li> <li>• Batch Sequence Number</li> </ul>	<ul style="list-style-type: none"> <li>• Data in PKG_BATCH_AWD, PKG_BATCH_DISB, STDNT_AWD_PKG, STDNT_PKG_DISB, STDNT_AWARDS, STDNT_AWRD_DISB.</li> <li>• Queries against PKG_BATCH_AWD, PKG_BATCH_DISB, STDNT_AWD_PKG, STDNT_PKG_DISB, STDNT_AWARDS, STDNT_AWRD_DISB for the student.</li> <li>• Temp packaging tables matching data in actual packaging tables.</li> </ul>
SFA_PKG_DATA: retrieves all data needed to investigate problems creating FA packaging records. Continued.		<ul style="list-style-type: none"> <li>• Data in DISB_SPLIT_CD, DISB_ID_SPLIT, DISB_PLAN_TBL, and DISB_ID_TBL. Queries against these tables for codes used when processing the student.</li> <li>• Data in STDNT_AGGR_LIFE and STDNT_AGGR_SCHL. Display totals from SFA_AGGR_BALANCE and EXPECTED_AWARD.</li> </ul>

### **Student Financials**

<b>Plug-In Name and Description</b>	<b>Additional Parameters</b>	<b>Provides a diagnosis of...</b>
<p>SSF_PAYMENT: retrieves all data needed to investigate problems with posting payments in Student Financials.</p>	<ul style="list-style-type: none"> <li>• Business Unit</li> <li>• Emplid of Student</li> <li>• Item Number</li> <li>• Payment ID Number</li> </ul>	<ul style="list-style-type: none"> <li>• Queries against PS_PAYMENTS_TBL to display the CHARGE_PRIORITY and STRM.</li> <li>• Queries against ITEM_SF to get the item term for the charge.</li> <li>• Queries against Charge Priority Tree to retrieve the SETID, TREE NAME, and TREE NODE for the charge priority.</li> <li>• Queries against the PMT_CHRG_PRIOR and PMT_CHRG_TBL to get the nodes in the charge priority list.</li> <li>• Queries against the PMT_CHRG_PRIOR and PMT_CHRG_TBL to get the pay future term, pay prior term, and pay future year flags.</li> <li>• Queries against ITEM_SF to retrieve a payment's unpaid balance.</li> <li>• Queries against ITEM_SF to retrieve a charge's unpaid balance.</li> </ul>

<b>Plug-In Name and Description</b>	<b>Additional Parameters</b>	<b>Provides a diagnosis of...</b>
<p>SSF_REFUNDING: retrieves all data needed to investigate problems with refunding a charge.</p>	<ul style="list-style-type: none"> <li>• Business Unit</li> <li>• Emplid of Student</li> <li>• Item Number</li> <li>• Payment ID Number</li> </ul>	<ul style="list-style-type: none"> <li>• Queries against ITEM_SF to get the item's outstanding balance, EFFDT, number of days encumbered, earning code if a refund, type of payment if a refund.</li> <li>• Queries against the setup table to determine the maximum and minimum refund amount, determine if debit balances are allowed to be refunded, determine if item type is marked as refundable and if a paygroup is associated with it.</li> <li>• Queries POSTED_DATE, PAYMENT_METHOD from PAYMENT_TBL to determine the posted date and if it is a credit card transaction.</li> <li>• Queries ACCOUNT_BALANCE from ACCOUNT_TOT_VW for the student's overall balance.</li> </ul>



## Appendix B

# Equation Engine Programmer's Guide

This appendix provides an overview of the PeopleSoft Equation Engine and discusses Equation Engine security.

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## Understanding Equation Engine

Oracle Corporation provides the PeopleSoft Equation Engine as a means for you to specify rules or equations as part of your business process. Equation Engine works best when you can specify an IF-THEN-ELSE validation resulting from a single call to an equation. For example, you may want to specify selection criteria by emplID or obtain a single number, string, or Boolean operator for that emplID.

The new version of the Equation Engine extends the capabilities of the original Equation Processor by adding looping and other constructs. It now can read any table for which you have security access and can perform various arithmetic operations and external call subroutines. In addition, security was added to ensure that control can be allocated based on your need and job function, which determine whether you need the ability to add, use, view, and modify equations, tables, and external routines.

With release 9, we added new syntax to enable you to perform mass actions—such as inserting, deleting, and updating rows in database tables—against the database using a single statement.

This section discusses:

- Online usage
- Architecture
- Language constructs
- Keyword syntax
- Basic language syntax

## Online Usage

You use the Equation Editor page to enter information about an equation. You can compile, test, view in XML format, and print equations; the system displays the compile status of the equation. You can also create, edit, and delete the contents of equations. The equation is divided into three main sections: Equation Keyword, Operand Type, and Operand. You use various combinations of these main sections to define and create equations.

Access the Equation Editor page (Select Set Up SACR, Common Definitions, Equation Engine, Equation Editor).

### Equation Editor

Equation Name: FAPDPLELIG

---

**Equation Table** Find | View All | First 1 of 1 | Last

\*Eff Date: 01/01/1900  Active  Enable Preview Results

Short Desc: PELLELIG \*Descr: Select Pell Eligible Candidate

Compile Status: Successfully Parsed

Equation Edit Function:

---

**Equation Detail** Find | View 18 | First 1-26 of 26 | Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			
<input type="checkbox"/>	2	If			
<input type="checkbox"/>	3	Not			
<input type="checkbox"/>	4	Exists	Global Variable	FOUND_FAN_ISIR_CMP_VW	
<input type="checkbox"/>	5	Then			
<input type="checkbox"/>	6	Find First	Global Variable	FOUND_FAN_ISIR_CMP_VW	
<input type="checkbox"/>	7		Table	FAN_ISIR_CMP_VW	
<input type="checkbox"/>	8		Keyed Global Equal	EMPLID	
<input type="checkbox"/>	9		Keyed Global Equal	INSTITUTION	
<input type="checkbox"/>	10		Keyed Global Equal	AID_YEAR	
<input type="checkbox"/>	11	End Find			
<input type="checkbox"/>	12	End If			
<input type="checkbox"/>	13	If			
<input type="checkbox"/>	14		Table	FAN_ISIR_CMP_VW	
<input type="checkbox"/>	15		Field	PRIMARY_EFC	
<input type="checkbox"/>	16	<=			
<input type="checkbox"/>	17		Number	3850.00000	
<input type="checkbox"/>	18	Then			
<input type="checkbox"/>	19	Assign	Global Variable	A_SELECT	
<input type="checkbox"/>	20		String	T	
<input type="checkbox"/>	21	End Assign			
<input type="checkbox"/>	22	Else			
<input type="checkbox"/>	23	Assign	Global Variable	A_SELECT	
<input type="checkbox"/>	24		String	F	
<input type="checkbox"/>	25	End Assign			
<input type="checkbox"/>	26	End If			

---

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

*Application Prompt ID	Description
1	Fin Aid Packaging Select Eqtns

---

**Parameters** Customize | Find | View All | First 1 of 1 | Last

Global	Type	Description
1		

Equation Editor page, FAPDPLELIG example



Use the Sel (select) check boxes to select the lines to be affected by the Equation Edit function. Use the Comment fields to enter comments about an equation lines. Comments are information only.

To edit an equation, after you select a Sel check box, select one of the following options from the Equation Edit Function drop-down list box:

- *Collapse Statements*
- *Compile*
- *Copy and Append to Clipboard*
- *Copy to Clipboard*
- *Cut and Append to Clipboard*
- *Cut to Clipboard*
- *Deselect All*
- *Expand Statements*
- *Paste After row*
- *Paste Before row*
- *Print*
- *Select All*
- *Select all between checks*
- *Test*
- *View in XML Format*

### ***Example of the Select All Between Checks Function***

On the Equation Editor page, select the Sel check boxes for lines 2 and 12.

From the Equation Edit Function drop-down list box, select *Select All Between Checks*. When you click the *Select All Between Checks* option, the following page displays the selected check boxes for lines 2 through 12.

### Equation Editor

Equation Name: EQTSTDEL2

Equation Table: Find | View All First 1 of 1 Last

'Eff Date: 01/01/1900  Active  Enable Preview Results

Short Desc: DelStChWh 'Descr: Del Stmt Block Choose Where

Compile Status: Not Yet Compiled

Equation Edit Function:

Equation Detail: Find | View All First 1-18 of 21 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			Demo delete state
<input checked="" type="checkbox"/>	2	Delete	Table	SCC_SRVIND_DRV	
<input checked="" type="checkbox"/>	3	Assign	Global Variable	FACTOR	
<input checked="" type="checkbox"/>	4		Number	3.00000	
<input checked="" type="checkbox"/>	5	End Assign			
<input checked="" type="checkbox"/>	6	Call	Equation	EQTSTCALL2	
<input checked="" type="checkbox"/>	7	Assign	Global Variable	EMPLID	
<input checked="" type="checkbox"/>	8		Table	SCC_SRVIND_DRV	
<input checked="" type="checkbox"/>	9		Field	EMPLID	
<input checked="" type="checkbox"/>	10	End Assign			
<input checked="" type="checkbox"/>	11	Choose	Equation	EQTSTCHOOSE1	
<input checked="" type="checkbox"/>	12	Where	Table	SCC_SRVIND_DRV	
<input type="checkbox"/>	13		Field	EMPLID	
<input type="checkbox"/>	14	>=			
<input type="checkbox"/>	15		Global Variable	EMPLID_BEGIN	
<input type="checkbox"/>	16	And			
<input type="checkbox"/>	17		Table	SCC_SRVIND_DRV	
<input type="checkbox"/>	18		Field	EMPLID	

Example for the Select All Between Checks option

### Example of the Cut to Clipboard Function

From the Equation Edit Function drop-down list box, select *Cut to Clipboard* to copy the contents to the clipboard for later use. The selected lines are removed, as shown in the following example.

### Equation Editor

Equation Name: EQTSTDEL2

**Equation Table** Find | View All First 1 of 1 Last

'Eff Date: 01/01/1900  Active  Enable Preview Results

Short Desc: DelStChWh \*Descr: Del Stmt Block Choose Where

Compile Status: Not Yet Compiled

Equation Edit Function: [Dropdown]

**Equation Detail** Find | View All First 1-10 of 10 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			Demo delete state
<input type="checkbox"/>	2		Field	EMPLID	
<input type="checkbox"/>	3	>=			
<input type="checkbox"/>	4		Global Variable	EMPLID_BEGIN	
<input type="checkbox"/>	5	And			
<input type="checkbox"/>	6		Table	SCC_SRVIND_DRV	
<input type="checkbox"/>	7		Field	EMPLID	
<input type="checkbox"/>	8	<=			
<input type="checkbox"/>	9		Global Variable	EMPLID_END	
<input type="checkbox"/>	10	End Delete			

Example for the Cut to Clipboard option

### Example of the Paste After Row Function

Select line 1 from the Sel check boxes.

From the Equation Edit Function drop-down list box, select *Paste After row*. Lines 2 through 12 are added from the clipboard, as shown in the following example:

**Equation Editor**

Equation Name: EQTSTDEL2

Equation Table: Find | View All First 1 of 1 Last

'Eff Date: 01/01/1900  Active  Enable Preview Results

Short Desc: DelStChWh 'Descr: Del Stmt Block Choose Where

Compile Status: Not Yet Compiled

Equation Edit Function:

Equation Detail: Find | View All First 1-18 of 21 Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			Demo delete state
<input type="checkbox"/>	2	Delete	Table	SCC_SRVIND_DRV	
<input type="checkbox"/>	3	Assign	Global Variable	FACTOR	
<input type="checkbox"/>	4		Number	3.00000	
<input type="checkbox"/>	5	End Assign			
<input type="checkbox"/>	6	Call	Equation	EQTSTCALL2	
<input type="checkbox"/>	7	Assign	Global Variable	EMPLID	
<input type="checkbox"/>	8		Table	SCC_SRVIND_DRV	
<input type="checkbox"/>	9		Field	EMPLID	
<input type="checkbox"/>	10	End Assign			
<input type="checkbox"/>	11	Choose	Equation	EQTSTCH00SE1	
<input type="checkbox"/>	12	Where	Table	SCC_SRVIND_DRV	
<input type="checkbox"/>	13		Field	EMPLID	
<input type="checkbox"/>	14	>=			
<input type="checkbox"/>	15		Global Variable	EMPLID_BEGIN	
<input type="checkbox"/>	16	And			
<input type="checkbox"/>	17		Table	SCC_SRVIND_DRV	
<input type="checkbox"/>	18		Field	EMPLID	

Example for the Paste After Row option

### Compile Function

From the Equation Edit Function drop-down list box, select *Compile* to check the syntax of the equation and to generate pseudo-code for the equation. You do not need to compile an equation; because the system compiles it for you when you run the equation. If you choose to compile an equation, you should compile the equation immediately after modifying it to check for syntax errors.

### Example of Using the Expand and Collapse Buttons

The Equation Edit Function drop-down list box contains collapse and expand functions. To use them, you must first select the lines to be collapsed or expanded; then, you perform the function. For example, when you perform the *Select All* edit function followed by the *Collapse Statements* edit function, all collapsible statements in the equation are collapsed.

This is an example of the equation after all statements are collapsed:

### Equation Editor

**Equation Name**      CC3CPSADMA

**Equation Table** Find | View All    First ◀ 1 of 1 ▶ Last

'Eff Date      01/01/1900   Active       Enable Preview Results

Short Desc      3C ADMA      'Descr      Pop Sel 3C Engine ADMA

Compile Status      Not Yet Compiled

Equation Edit Function     

**Equation Detail** Find | View All    First ◀ 1-6 of 6 ▶ Last

Sel	Line	Keyword	Operand Type	Operand	Comment:
<input type="checkbox"/>	1	Skip			<input type="text"/>
▶ <input type="checkbox"/>	2	Assign	Local Variable	OPRALIATYPE	<input type="text"/>
<input type="checkbox"/>	5	Call	Equation	CCGETOPALIAS	<input type="text"/>
▶ <input type="checkbox"/>	6	Call Params			<input type="text"/>
▶ <input type="checkbox"/>	9	Assign	Local Variable	OPERATOR_EMPLID	<input type="text"/>
▶ <input type="checkbox"/>	12	Insert	Table	TRGR_PS_3CS_TBL	<input type="text"/>

Example for the Collapse Statements option

### ***Example of View In XML Format***

When you select the *View In XML Format* edit function, the equation appears as an XML document in your browser. Because no style is associated with the XML document, the equation is presented as a document tree, in which the statements are indented and collapsible. The equation cannot be edited from the XML view of the equation.

```

- <EQUATION>
  <EQUATIONNAME>EQTSTDEL2</EQUATIONNAME>
  <SKIP />
  <COMMENT>Demo delete statement.</COMMENT>
- <DELETE>
  <TABLE>SCC_SRVIND_DRV</TABLE>
  - <ASSIGN>
    <GLOBAL>FACTOR</GLOBAL>
    3
  </ASSIGN>
  <CALL />
  <EQTN>EQTSTCALL2</EQTN>
  - <ASSIGN>
    <GLOBAL>EMPLID</GLOBAL>
    <TABLE>SCC_SRVIND_DRV</TABLE>
    <FIELD>EMPLID</FIELD>
  </ASSIGN>
  <CHOOSE />
  <EQTN>EQTSTCHOOSE1</EQTN>
  <WHERE />
  <TABLE>SCC_SRVIND_DRV</TABLE>
  <FIELD>EMPLID</FIELD>
  >=
  <GLOBAL>EMPLID_BEGIN</GLOBAL>
  <AND />
  <TABLE>SCC_SRVIND_DRV</TABLE>
  <FIELD>EMPLID</FIELD>
  <=
  <GLOBAL>EMPLID_END</GLOBAL>
</DELETE>
</EQUATION>

```

Example EQTSTDEL2 in XML format

### Testing Equations

To test the equation, you may need to set up test data. In the previous example, the function of the equation was to add a few numbers together. No test data was needed because no global variables were needed. However, to test an equation that references keys in the table, passes global variables, or both you must provide the equation with test data.

To define and enter test data, go to the Equation Test Data page and define the name of the variable, its type, and its operand.

Access the Equation Test Data page (Select Set Up SACR, Common Definition, Equation Engine, Equation Test Data).

### Equation Test Data

Equation: EQTSTDEL2      Del Stmt Block Choose Where      Test

**Input Parameters** Find | View All    First ◀ 1-3 of 3 ▶ Last

Global	Type	Operand	+ -
EMPLID_BEGIN	String ▼	CC0001	+ -
EMPLID_END	String ▼	CC0001	+ -
SPORT	String ▼	SO	+ -

Equation Test Data page

After you define the necessary variables and enter data on the Equation Test Data page, click the Test button.

**Note.** You can also run a test from the Equation Editor by selecting *Test* from the Equation Edit Function drop-down list box.

When you click the Test button, the system displays the Equation Test Results, Process Messages tab:

Global Variables    Process Messages

### Equation Test Results

Equation: EQTSTDEL2      Del Stmt Block Choose Where      Effective Date: 01/01/1900

**Process Instance Detail** Find | View All    First ◀ 1 of 1 ▶ Last

Process Instance: 1069

Messages Logged				
Msg Seq	Severity	DateTime	Details	Message Text
1 Message		18/09/2008 7:00:12PM	<a href="#">Details</a>	Equation runner started running EQTSTDEL2 at line 0. (14460,300)
2 Message		18/09/2008 7:00:14PM	<a href="#">Details</a>	3.00000 factorial is 6.00000 (14460,342)
3 Message		18/09/2008 7:00:17PM	<a href="#">Details</a>	Equation runner finished running EQTSTDEL2 at line 21. (14460,301)

Equation Test Results page, Process Message tab

This tab displays the messages associated with the equation test run.

The Equation Test Results, Global Variables tab displays the global variables used within the current equation run:

**Equation Test Results**

Equation Name: EQTSTDEL2 Del Stmt Block Choose Where

Effective Date: 01/01/1900

Process Instance Detail Find | View All First 1 of 1 Last

Process Instance: 1069

Global Variable Final Values Find | View All First 1-7 of 28 Last

Global	Type	Operand
!CALLING-PROCESS-INSTANCE	Number	0.00000
!CURRENT-DATE	Date	18/09/2008
!CURRENT-DATE-TIME	String	2008-09-18-19.00.08.720000
!CURRENT-TIME	String	19.00.08.720000
!EQTN-EFFDT	Date	18/09/2008
!EQTN-MSG-SEQ	Number	0.00000
!EQTN-RESULTS-PREVIEW	String	N

Equation Test Results page, Global Variables tab

The *Print* option in the Equation Edit function on the Equation Editor page enables you to print equations in a Crystal report format. When you select the *Print* option, the Equation Print page displays where you are required to enter a run control ID:

**FA753 Equation Print**

Find an Existing Value | Add a New Value

Run Control ID:

Add

Equation Print page

Running the subsequent process yields a report that looks like this:



FA753: Equation Report				
<b>Equation</b>	EQTSTDEL2	Del Stmt Block Choose Where		
	<b>Eff Date</b>	1/1/1900	<b>Print Date</b>	11/17/2008
<b>Line Number</b>	<b>Keyword</b>	<b>Operand Type</b>	<b>Operand</b>	<b>Comment</b>
1	Skip			Demo delete statement.
2	Delete	Table	SCC_SRVIND_DRV	
3	Assign	Global Variable	FACTOR	
4		Number	3.00000	
5	End Assign			
6	Call	Equation	EQTSTCALL2	
7	Assign	Global Variable	EMPLID	
8		Table	SCC_SRVIND_DRV	
9		Field	EMPLID	
10	End Assign			
11	Choose	Equation	EQTSTCHOOSE1	
12	Where	Table	SCC_SRVIND_DRV	
13		Field	EMPLID	
14	>=			
15		Global Variable	EMPLID_BEGIN	
16	And			
17		Table	SCC_SRVIND_DRV	
18		Field	EMPLID	
19	<=			
20		Global Variable	EMPLID_END	
Page	1 of	2		

---

<b>Equation</b>	EQTSTDEL2	Del Stmt Block Choose Where		
	<b>Eff Date</b>	1/1/1900	<b>Print Date</b>	11/17/2008
<b>Line Number</b>	<b>Keyword</b>	<b>Operand Type</b>	<b>Operand</b>	<b>Comment</b>
21	End Delete			

## EQTSTDEL2 Report

# Architecture

The architectural changes in the current version of the Equation Engine are divided into two components: the Compiler and the Interpreter. The Compiler transforms the equation into pseudo-code (a pcode different from PeopleTools pcode), that is a type of platform-independent, low-level assembly code. The Interpreter reads the pcode and executes the equation directly. This method enables you to validate the syntax without running the equation. It also simplifies the logic of the programs.

### **Technical Notes**

The architectural approach is a left-to-right look-ahead parser. Context sensitivity was pushed down to the lexical analyzer to make the parsing algorithm simpler.

Standard compiler design uses the driving routine as the parser. The parser makes calls to the lexical analyzer to retrieve units of logical language, called *Tokens*. It builds a parse tree, which is an internal representation of the structure of the program. It then reduces the parsing stack using the parse tree. For example, an if-then-else-end-if construct would be reduced to an if statement. Some of the reductions trigger calls to the object code generator, which generates the target language to be emitted. In this instance, the compiler output is the pcode. The design of the interpreter is simplified because the pcode is low-level.

Statement constructs were designed to end with *END-XXXX* phrases so that the parsing table state transitions are from top to bottom. When the equation is compiled by means of the compile equation edit function, additional up-front syntax checks are performed to provide more compile messages with more clarity about what is syntactically wrong with the equation. Additionally, if one of the more complicated statements has a syntax error, then a message appears showing the language syntax for that statement.

# Language Constructs

Equation Editor uses the language constructs discussed in the following topics.

### **Keywords**

Keyword usage is mostly self-explanatory. Complex keywords will be explained later in the context of their syntactical constructs. These are the keywords:

- (
- )
- \*
- +
- -
- /
- <

- <=
- <>
- =
- >
- >=
- And
- Assign
- Call
- Call Params
- Choose
- Delete
- Else
- Else If
- End Assign
- End Call Params
- End Delete
- End Find
- End If
- End Insert
- End Loop
- End Message
- End Restore
- End Save
- End Update
- Exists
- Exit Loop
- Find First
- Find Next
- From
- Halt

- If
- Insert
- Into
- Loop
- Message
- Not
- Or
- Restore
- Return
- Save
- Set
- Skip
- Then
- Trace
- Update
- Where

### ***Global and Local Variables***

Two types of variables are available in the Equation Engine: global and local. Data is passed to the Equation Engine by means of the global variable array or a process instance of the global variable tables that is defined by the Equation Test Data page or a calling program. Global variables are visible and can be referenced by any equation running or called. Local variables are visible only to the currently running equation.

Local and global variables can have a *stem* qualification. *Stems* are similar to arrays except that they have more versatility and are unbounded. You can assign a variable a name that ends with a period (.) to a default value (for example, DOGOWNER. = "unknown"), and then reference a subscript of that stem. If the subscript was not initialized with a value, then it will pick up the default value (for example, DOGOWNER.X has the value "unknown").

Stems are more versatile than arrays because the bounds of an array must be declared, but stems have no bounds to be declared and the subscripts do not have to be numeric. Therefore, you can have a subscript value of "Fido" instead of 7 (for example, Assign X = "Fido" and then Assign DOGOWNER.X = "Joe"). This construct not only allows a pseudo array processing capability, it also allows a pseudo pointer capability (for example, NODE.LEFT and NODE.RIGHT).

Read-only (system) variable names always begin with an exclamation mark.

Depending on which application is invoking the equation, different global variables may be assumed to be passed into the equation and different global variables (or none) are expected to be returned from the equation.

### ***Global Variables Always Passed in for All Applications***

The following global variables are always passed in:

- !CURRENT-DATE
- !CURRENT-DATE-TIME
- !CURRENT-TIME
- !EQUATION-NAME
- !PROCESS-INSTANCE
- !RUN-CNTL-ID
- OPRID (always read-only, FIND tests are forced to equality)
- PROCESS-INSTANCE (passed in)
- PROCESS\_INSTANCE (actually used)
- RUN\_CNTL\_ID

### ***Global Variables Passed in for the Forms Engine Financial Aid Award Notification Letter (FEFANLTR)***

The following global variables are passed in:

FANLTR\_SEQ

These global variables enable the equation to read the table RUNCNTL\_FAN\_SEQ, which provides these fields:

- INSTITUTION
- AID\_YEAR
- PKG\_AWARD\_PERIOD

The equation can then assign global or local variables to these fields in order to loop through reading the table FAN\_AWD\_SEL\_VW to determine whether or not to select an EMPLID. If the EMPLID is to be selected, the equation calls the SQL FANLTR\_SELECT\_STUDENT, passing in the EMPLID.

---

**Note.** No global variables are returned for FEFANLTR.

---

### ***Global Variables Passed in for Financial Aid Packaging***

The following global variables are passed in:

- EMPLID
- INSTITUTION
- AID\_YEAR

- ACAD\_CAREER
- AWARD\_PERIOD
- I\_TRGT\_FED\_RMNEED
- I\_TRGT\_INST\_RMNEED
- I\_TRUE\_FED\_RMNEED
- I\_INST\_RMNEED
- I\_LAST\_AWD\_ATM
- I\_TOTAL\_AWD\_AMT
- WORK\_FIELD\_CHAR\_01 through 05 (These global variables retain their values between equation calls. Initially, they are blank.)
- WORK\_FIELD\_NUM\_01 through 05 (These global variables retain their values between equation calls. Initially, they are zero.)
- A\_SELECT (initially blank)
- A\_AMOUNT (initially zero)

The following global variables are examined upon return from the equation:

- A\_SELECT (either "T" or "F", where "T" causes the student to be selected only for equations with the application prompt type of "Fin Aid Packaging Select Eqtns")
- A\_AMOUNT (numeric dollar amount to be returned only for equations with the application prompt type of "Fin Aid Packaging Amount Eqtns")

### ***Global Variables Passed in for Student Financials Tuition Calculation***

The following global variables are passed in:

- EMPLID
- INSTITUTION
- ACAD\_CAREER
- STRM
- BUSINESS\_UNIT
- BILLING\_CAREER
- STDNT\_CAR\_NBR
- A\_SELECT (initially blank)
- A\_AMOUNT (initially zero)

These global variables are examined upon return from the equation:

- A\_SELECT (either "Y" or "N"; only the first character of the string is examined, but only for equations with the application prompt type of "Stdnt Fin Tuition Select Eqtns")
- A\_AMOUNT (dollar amount to be returned, but only for equations with the application prompt type of "Stdnt Fin Tuition Amount Eqtns")

### ***Global Variable Passed in for CommonLine and Common Record CommonLine Loan Validation***

The global variable LN\_ACTION\_STATUS (initially "O" for OK) is passed in.

The following records are already fetched, and you can reference their fields:

- LN\_EDIT\_RUN\_VW (for CL4 only)
- SFA\_CRCEDRUN\_VW (for CRC only)
- LOAN\_ORIGNATN
- LN\_TYPE\_TBL
- LN\_CL\_PNOTE\_VW (for CL4 only)
- SFA\_CRC\_PNOTE (for CRC only)
- LN\_DEST\_CATG\_VW (for CL4 only)
- SFA\_CRC\_DCAT\_VW (for CRC only)

The edit equation should set this global variable:

LN\_ACTION\_STATUS (looks for "O" for OK, or for "F" for Failed to pass the edit)

Every edit calls FA\_EDGETDEST (CL4) or FACEDGETDEST (CRC), which sets the global DEST\_ACTV. Next, the equation must test if the value is "Y" and if not, then return; otherwise, if the edit finds an error, it calls equation FA\_EDLOGERR (CL4) or FACEDLOGERR (CRC), passing it the EQUATION\_NAME local variable.

### ***Global Variables Passed in for CommonLine and Common Record CommonLine Loan Hold/Release Processing***

The following global variables are passed in:

- AID\_YEAR
- EMPLID
- INSTITUTION
- STRM
- TABLE\_ID (always "1")
- LOAN\_TYPE
- LN\_APPL\_SEQ

- DISBURSEMENT\_ID
- ITEM\_TYPE
- RESULT (initially blank)
- HR\_MSG\_SET\_NBR
- HR\_MSG\_NBR

These global variables are examined upon return from the equation:

- RESULT (either "PASS" or "FAILED")
- HR\_MSG\_SET\_NBR and HR\_MSG\_NBR (string numeric Hold/Release message set number and message number are examined only if RESULT is "FAILED")

### **Global Variable Passed in for Population Selection**

This global variable is passed in:

!CALLING-PROCESS-INSTANCE

No global variables are expected upon return; however, rows may be inserted into the target table.

---

**Note.** If a local or global variable does not have an assigned value when it is referenced, then the Equation Engine gives a runtime error. See the EXISTS keyword for more details.

---

### **Tables and Fields**

You can read and use the table and fields by defining the tables to be used in the Equation Data Tables page.

Access the Equation Data Tables page (Select Set Up SACR, Common Definition, Equation Engine, Equation Data Tables).

Equation Data Tables			
Equation Data Record Name:		EQTN_NAME_VW	
Table Information			Customize   Find   View All   First 1 of 1 Last
*Eff Date	*Status	*Description	
01/01/1900	Active	Equation Name View	+ -

Equation Data Tables page

If you reference a table-field but that table has not been read, then an implicit read will be performed with the assumption that the global variables are defined the same as the key to that table (for example, EMPLID, INSTITUTION, STRM, and so on). After the table is read, the first value of the read will be placed in that field.



## ***Runtime Errors***

If a variable is referenced but it has not been assigned a value, then a runtime error will occur. Also, if a table field is referenced and the fetch count is zero (no rows found), then a runtime error will also occur. One way of avoiding this error is to use the *EXISTS* keyword to determine whether the field or variable had a value and to either set a default value or issue a modified message and halt. This situation might occur if you call another equation that expects a local variable to be passed.

## **Keyword Syntax**

The maximum number of lines in an equation is 10,000.

---

**Note.** A truth value has an arithmetic value of zero for FALSE, and any other value is TRUE.

---

### ***Logical Operators***

Logical operators AND, OR, and NOT are used within an IF statement.

#### ***Syntax***

<Condition1> <Logical Operator> <Condition2>

#### ***Syntax***

NOT <Condition>

### ***Relational Operators***

Relational operators: <, <=, =, >=, >, <>

Relational operators compare two expressions and yield a truth value. Use parentheses to group expressions and to enhance readability.

#### ***Syntax***

<Expression1> <Relational Operator> <Expression2>

### ***Arithmetic Operators***

Arithmetic operators: +, -, \*, /

Arithmetic operators apply to two expressions and yield an arithmetic result. Use parentheses to group expressions and to enhance readability.

#### ***Syntax***

<Expression1> <Arithmetic Operator> <Expression2>

If rounding or truncation to an integer is necessary, then a call must be made to an external subroutine or equation (for example, the "ROUND" equation) that handles the task.

## **ASSIGN**

Keywords: ASSIGN and END ASSIGN

The ASSIGN statement enables you to assign a value to either a local or a global variable. Every ASSIGN statement must be concluded with an END ASSIGN keyword.

### **Syntax**

ASSIGN <Local or Global> <Variable Name> <Expression> END ASSIGN

---

**Note.** Local variables exist and can be referenced only within the context of the current equation, but global variables exist for the duration of the Equation Engine run. A global variable set in one equation can be referenced within a called equation and vice versa.

---

## **CALL**

Keywords: CALL, CALL PARMS, and END CALL PARMS

The CALL statement enables an equation to call another equation, a callable SQL, or an external subroutine.

### **Syntax**

This table lists examples of syntax for the keywords CALL, CALL PARMS, and END CALL PARMS:

<b>Equation Keyword</b>	<b>Operand Type</b>	<b>Operand</b>
CALL	<routine type>	<routine name>
CALL PARMS		
	LOCAL	<variable name>}...
END CALL PARMS		

The CALL PARMS statement applies only to calling other equations or calling SQL. The types of routines are defined as equations, external subroutines, and SQL. You do not pass call parameters to external subroutines. To pass parameters to and from external subroutines, you must use global variables.

To use the Application Engine, you must call the Equation Engine from the Application Engine because the COBOL call to Application Engine is not supported.

For equation calls, the list of local variable names in the parameter list and their values are copied as separate local variables into the called equation. Local variables changed within the called equation are not changed upon the return to the calling equation. To pass a value back to a calling equation, the value must be returned by means of a global variable. Any returned global variable name should begin with the called equation name. If only one value is returned, the name should be <equation name>\_RESULT. If you are returning a set of values, you can set the values into a global stem to encapsulate the result.

Equations can call themselves recursively; however, the maximum depth of equation call nesting is set at 1,000 calls. If your design requirements exceed the set amount, you must use a loop.

For SQL calls, the SQLID must exist in the Equation SQL setup table.

Access the Equation Callable SQL page (Select Set Up SACR, Common Definitions, Equation Engine, Equation SQL Routines).

The security for SQL calls is controlled through the operator alias type of EQS.

---

**Note.** You can use CALL SQL for updates, inserts, deletes, or small row retrieval selects (<1000), but use FIND statements instead of calling SQL with selects whenever possible.

---

### ***CALL parameter order***

The call parameter requires this order when calling a SQL:

Return code,

SQL row count,

Bind variable 1,

Bind variable 2,

.

Bind variable n,

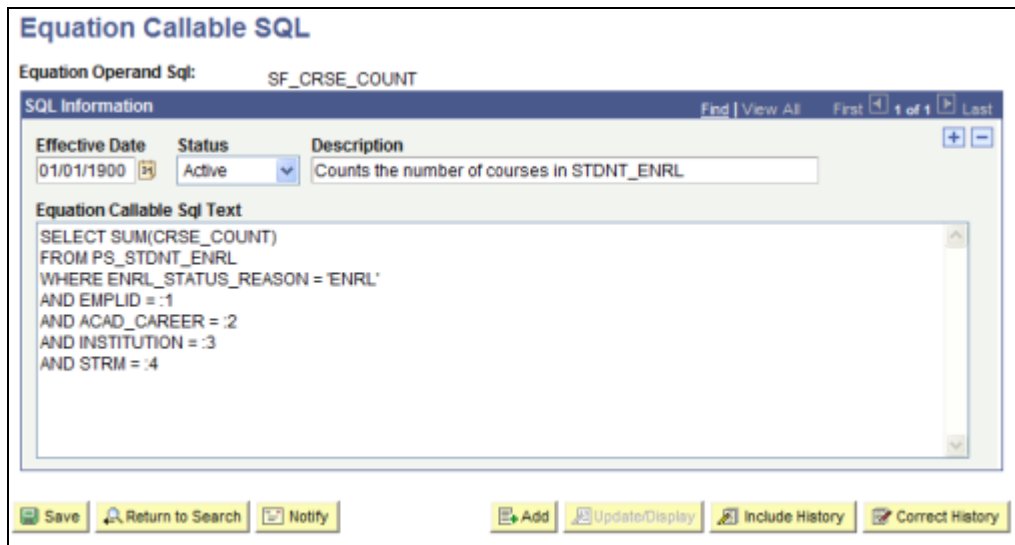
Select variable 1,

Select variable 2,

.

Select variable n,

This is an example of a Call SQL Setup:



Equation Callable SQL page

All of the call parameters for SQL must be local variables. Global variables are not permitted. The select variables, if any, are updated by the call and are passed back to the calling equation, which differs from the effect of calling another equation and passing the local variables. If an equation modifies a passed local variable, that change is not reflected upon return to the calling program. However, when you call an SQL, the return code, SQL row count, and all of the select variables are modified by the call upon return from that called SQL.

Select variables are mapped to call parameters after the bind variables are mapped. The select variables must be stems to handle multiple rows of output (for example, EMPLID.1, EMPLID.2, and so on). Remember that a stem variable ends with a period and behaves similarly to an array.

## **DELETE**

Keywords: DELETE, CHOOSE, WHERE, and END DELETE

### **Syntax**

The following table shows examples of syntax for the keywords DELETE, CHOOSE, WHERE, and END DELETE:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
DELETE	TABLE	<table name>
<statement block>		
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	
END DELETE		

This statement deletes rows from the specified table, limited to the <where expression> evaluating to true (if it is supplied), and also limited to the choose equation (if it is supplied) returning a true value for each row.

<table name> is the name of a table to which the user has Equation Engine (EE) write authority.

<statement block> is any set of equation statements, except not DELETE, INSERT, nor UPDATE. Typically, if any statements exist, they are ASSIGN statements setting global variables that will be used within the CHOOSE equation, if it is specified.

<where expression> is passed to the database when you select which rows to delete. The database returns the resultant rowset to the delete statement. If no where clause is specified, then all rows in the table are processed. The where clause may mention table-fields from the table operand of the delete keyword as well as any other table to which the user has EE read authority. The other tables, if mentioned, do not get rows delete, but rather may be used to limit which rows will be deleted by joining to the table in which rows are being deleted.

CHOOSE clause is optional and if specified will cause EE to call the choose equation once for each row in the rowset to be processed. Typically, any necessary global variables needed by the choose equation to do its function were set within the aforementioned <statement block>. After calling the choose equation, the choose clause will first look to see if there is a global variable with the same name as the choose equation name. If there is, then it will inspect it for a value of the number zero, which it will interpret as a false condition. Any other value is a true condition. If a true condition is returned, then the row is selected for processing. If it does not find the global variable with the same name as the choose equation name, then it will look for the global variable named A\_SELECT. If a value is set for A\_SELECT, it can have one the following values, which will indicate a true condition: T, TRUE, t, true, Y, YES, y, or yes. Any other value is considered to be a false condition.

**EXISTS**

Keyword: EXISTS

The EXISTS statement tests to determine whether a variable exists or whether any rows were returned when the EXISTS statement is applied against a table. It cannot be used to validate field names.

**Syntax**

This table shows example syntax for the keyword EXISTS:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
EXISTS	<object type>	<object name>

<object type> is a local variable, global variable, or table name.

It returns a truth value and is typically used within an IF statement. It is commonly used to validate variables or tables prior to its usage to avoid runtime errors. If the variable has not been initialized, then the calling program must set default values to variables.

Example:

If you establish an equation (COMPUTE\_ANGLE) that will be called by other equations, it requires the following parameters to be passed:

- XROW

- YROW
- DISTANCE

The COMPUTE\_ANGLE tests to make sure XROW, YROW, and DISTANCE exist. If they do not, then variables can be set to default values or you can return a message to the calling equation.

When referencing table fields, the EXISTS statement determines whether a row has been selected for a given table name using either an implicit or explicit FIND statement.

## ***FIND***

Keywords: FIND FIRST, FIND NEXT, and END FIND

The FIND FIRST keyword positions the equation in the first row of the specified table for the given key values and key relational operators. The FIND NEXT keyword moves to the next row within that previously specified set of key values and key relational operators. If you need to process multiple rows of data within a single call to an equation, you should use a FIND FIRST followed by a LOOP statement that contains a FIND NEXT near the end of the statement. Test the find success variable to determine when to exit the loop.

---

**Note.** An implicit FIND is performed when a field of a table is referenced and no FIND FIRST was previously issued. In the implicit FIND, all relational operators are considered equal. The key values are obtained from the global variables defined within the equation and from where the global variable names match the key field names of the table.

---

## ***Syntax***

This table shows examples of syntax for the keywords FIND FIRST, END FIND, and FIND NEXT:

<b><i>Equation Keyword</i></b>	<b><i>Operand Type</i></b>	<b><i>Operand</i></b>
FIND FIRST	<local or global>	<find success variable>
	TABLE	<table name>
	{<find condition>	<field name>}
END FIND		
N/A	N/A	N/A
FIND NEXT	<local or global>	<find success variable>
	TABLE	<table name>
END FIND		

The find success variable can be a local or global variable containing a truth value that indicates whether a row was found.

The find condition operators (EQUAL, GREATER-THAN, and GREATER-THAN-OR-EQUAL-TO) compare the assign variable against the table. The variables must have the same names as the fields of the table.

Every FIND statement must end with an END FIND keyword.

### **Example of Find Setup**

This table shows example syntax for the keyword FIND FIRST:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
FIND FIRST	LOCAL	FOUND_STUDENT
	TABLE	STDNT_FA_TERM
	KEYED LOCAL EQUAL	EMPLID
	KEYED LOCAL EQUAL	INSTITUTION
	KEYED LOCAL EQUAL	STRM
END FIND		

An alternative to looping through successive FIND NEXT statements is to issue a single CALL SQL statement, where the called SQL is a select statement. The values returned are placed into local stem variables, of which there is an upper limit of one thousand. If you exceed the limit, the equation engine will halt with a runtime error. For a large number of returned rows, it is best to process them with successive FIND NEXT statements and handle the data one row at a time. If you need to do changes en masse, you can call SQL to update temporary tables and avoid row-by-row processing, this technique is preferred.

### **HALT**

Keyword: HALT

The HALT statement stops the execution run of all equations. The Equation Engine immediately returns control to its calling program; control is not returned to a calling equation. This keyword is typically used in the event of a catastrophic error. For example, a test is performed to determine whether a row exists for an emplID. If it does not, you issue a customized message to stop the equations.

### **IF**

Keywords: IF, THEN, ELSE IF, ELSE, and END IF

The IF statement executes different statements depending on truth values within its conditions. Each IF statement block must conclude with an END IF keyword.

### **Syntax**

IF

<condition-1>

THEN

<statement block-1>

[ELSE IF

<condition-n>

THEN

<statement block-n>] ...

[ELSE

<statement block-n+1>]

END IF

Equation Detail						Find	View All	First	1-14 of 14	Last
Sel	Line	Keyword	Operand Type	Operand	Comment:					
<input type="checkbox"/>	1	If								
<input type="checkbox"/>	2	Not								
<input type="checkbox"/>	3	Exists	Global Variable	X						
<input type="checkbox"/>	4	Then								
<input type="checkbox"/>	5	Assign	Global Variable	X						
<input type="checkbox"/>	6		Number	10.00000						
<input type="checkbox"/>	7	End Assign								
<input type="checkbox"/>	14	Else								
<input type="checkbox"/>	15	Assign	Global Variable	X						
<input type="checkbox"/>	16		Global Variable	X						
<input type="checkbox"/>	17	*								
<input type="checkbox"/>	18		Number	1.50000						
<input type="checkbox"/>	19	End Assign								
<input type="checkbox"/>	20	End If								

Equation Editor page, if and End If Example

The ELSE IF and ELSE expressions are optional. The ELSE IF expression enables you to create a case control structure so a single END IF can be used instead of nesting IF's. You can have zero, one, or several "ELSEIF ... THEN ..." constructs within a single IF statement.

Nested IF statements are allowed within the equation. A statement block can contain any other statements, including an IF statement.

### **INSERT**

Keywords: INSERT, INTO, FROM, CHOOSE, WHERE, and END INSERT



## Syntax

This table shows examples of syntax for the keywords INSERT, INTO, FROM CHOOSE, WHERE and END INSERT:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
INSERT	TABLE	<table name>
[<statement block>]		
<INTO	FIELD	<field name>
FROM	<expression>	>...
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	
END INSERT		

This statement inserts rows into the specified table, limited to the <where expression> evaluating to true (if it is supplied), and then also limited to the choose equation (if it is supplied) returning a true value for each row.

<table name> is the name of a table to which the user has Equation Engine (EE) write authority.

See the DELETE statement for details on the <statement block>, CHOOSE, and WHERE clauses.

INTO specifies a field that is to have a value when the row is inserted. Its value is set from the result of the <expression> in the FROM clause. If a field is marked as being 'required' within the Application Designer definition for that record, then that field must have an INTO clause associated with it. If the FROM <expression> specifies a global stem, in the format of <recname>.<fieldname>.<anyname>, then the <anyname> qualified is assumed to be an index into the global stem with the name <recname>.<fieldname>, and the ending limit of that index will be assumed to be the <recname>.!COUNT global value. (See alternate insert syntax.)

## Alternate Syntax

This table shows examples of syntax for the keywords INSERT, CHOOSE, WHERE, and END DELETE:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
INSERT	GLOBAL	<recname>.
[<statement block>]		
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	
END DELETE		

This statement acts like the INSERT statement, except that the rename is followed by a dot, which makes the target of the insert a global stem. The value of <rename>.!COUNT will contain the number of rows in the global stem. If *X* is a global number holding a row number, then <rename>.<fieldname>.*X* will contain the value of the field <fieldname> in the table <rename> at row number *X*.

## **LOOP**

Keywords: LOOP, EXIT LOOP, and END LOOP

The LOOP statement permits a block of statements to be run repetitively. Each LOOP statement block must end with an END LOOP statement.

### **Syntax**

LOOP

<statement block>

END LOOP

Every loop block should include an EXIT LOOP keyword to stop the loop when the desired condition is reached. A RETURN or HALT statement can also be substituted, though it is discouraged because it makes your equations more difficult to maintain.

## **MESSAGE**

Keywords: MESSAGE and END MESSAGE

The MESSAGE statement writes a message to the message log file (PS\_MESSAGE\_LOG) under the current process instance. It can contain up to 10 values, each of which can be a constant string, constant number, local or global variable, or table-field.

### **Syntax**

This table shows an example of syntax for the keyword MESSAGE:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
MESSAGE		
	{<data type>	<data value>}
END MESSAGE		

<data type> : STRING, DATE, NUMBER, LOCAL, GLOBAL, or TABLE xxx FIELD yyy

---

**Note.** Writing a message triggers a commit to be performed.

---

## **RESTORE**

Keyword: RESTORE

**Syntax**

This table shows example syntax for the keyword RESTORE:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
RESTORE	STRING	<equation global space
	[GLOBAL	<global variable name>]...
END RESTORE		

The RESTORE statement restores the specified global variable names from the previously created equation global space that is specified. If no global variable names are listed, then all global variables are restored, excluding read-only system variables.

**RETURN**

Keyword: RETURN

The RETURN statement causes the equation currently executing to stop processing, and it returns control to the calling equation. If no calling equation exists, then control returns to the program that called the Equation Engine. HALT and RETURN act the same if the Equation Engine calls only one equation and that equation does not call any others. An implicit RETURN statement is appended to the end of every equation if one was not placed there explicitly. The RETURN statement has no parameters. If you want to pass a parameter back to a calling equation, you must use global variables.

**SAVE**

Keyword: SAVE

**Syntax**

This table shows example syntax for the keyword SAVE:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
SAVE	STRING	<equation global space
	[GLOBAL	<global variable name>]...
END SAVE		

The SAVE statement saves the specified global variable names to the specified equation global space. If no global variable names are listed, then all global variables are saved into the global space.

**SKIP**

Keyword: SKIP

The SKIP statements are used to make a program more readable. It allows you to break up the program statements, and it can simplify your IF logic.

---

**Note.** A SKIP statement does not affect your program.

---

## **TRACE**

Keyword: TRACE

The TRACE statement causes the equation currently executing to start or stop displaying the type of trace information specified by the operand type.

### **Syntax**

This table shows example syntax for the keyword TRACE:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
TRACE		
	{<trace type>	<trace status>}...
END MESSAGE		

<trace type>: SOURCE, PCODE or SQL.

<trace status>: ON or OFF

Tracing SOURCE causes the line numbers of the source equation to appear to the COBOL log file as they are run; intermediate values also appear. Tracing PCODE causes the pseudo-code functions, their parameters, and their line numbers to appear as they are run; intermediate values and function results also appear. Tracing SQL causes the actual SQL that is run to appear; bind variables and values, if any, as well as the return code and row count or dml count for the SQL also appear. Retrieved table and-field values do not appear. To enable more than one trace type at the same time, issue more than one trace statement. Tracing remains in effect globally until disabled. Therefore, a trace enabled in a called equation will continue tracing when control returns to the calling equation, and vice versa.

## **UPDATE**

Keywords: UPDATE, SET, CHOOSE, WHERE, and END UPDATE

### **Syntax**

The table shows example syntax for the keyword UPDATE:

<i>Equation Keyword</i>	<i>Operand Type</i>	<i>Operand</i>
UPDATE	TABLE	<table name>
[<statement block>]		

<b>Equation Keyword</b>	<b>Operand Type</b>	<b>Operand</b>
<SET	FIELD	<field name>
	<expression>	>...
[CHOOSE	EQUATION	<equation name>]
WHERE	<where expression>	
END UPDATE		

This statement updates rows in the specified table, limited to the <where expression> evaluating to true. See the DELETE statement for details on the <statement block>, CHOOSE, and WHERE clauses.

SET clause sets the specified <field name> in the <table name> to the value of the <expression>.

## Basic Language Syntax

This table lists the parse objects used in the Equation Editor:

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<PROGRAM>	<STMT BLOCK> <ENDPROGRAM TOKEN>	ACCEPT	
<STMT BLOCK>	<STMT BLOCK> <STMT>		
<STMT BLOCK>	<STMT>		
<STMT>	<IF STMT>		
<STMT>	<LOOP STMT>		
<STMT>	<ASSIGN STMT>		
<STMT>	<CALL STMT>		
<STMT>	<RETURN STMT>		
<STMT>	<HALT STMT>		
<STMT>	<MESSAGE STMT>		
<STMT>	<EXIT LOOP STMT>		

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<STMT>	<SKIP STMT>		
<STMT>	<FIND STMT>		
<STMT>	<FIND NEXT STMT>		
<STMT>	<TRACE STMT>		
<STMT>	<DELETE STMT>		
<STMT>	<INSERT STMT>		
<STMT>	<RESTORE STMT>		
<STMT>	<SAVE STMT>		
<STMT>	<UPDATE STMT>		
<IF STMT>	<IF START> <OR EXPR> <THEN PHRASE> <IF CLOSURE>	IFSTMT	
<IF CLOSURE>	<ELSIF THEN LIST> <STMT BLOCK> <IF ENDING>		
<IF CLOSURE>	<STMT BLOCK> <IF ENDING>		
<IF ENDING>	<ELSE PHRASE> <STMT BLOCK> <ENDIF TOKEN>		
<IF ENDING>	<ENDIF TOKEN>		
<ELSIF THEN LIST>	<ELSIF THEN LIST> <ELSIF THEN PHRASE>		
<ELSIF THEN LIST>	<ELSIF THEN PHRASE>		
<ELSIF THEN PHRASE>	<STMT BLOCK> <ELSIF PHRASE> <OR EXPR> <THEN PHRASE>		
<IF START>	<IF TOKEN>	IFSTART	
<LOOP STMT>	<LOOP START> <STMT BLOCK> <ENDLOOP TOKEN>	LOOPEND	

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<LOOP START>	<LOOP TOKEN>	LOOPSTART	
<ASSIGN STMT>	<ASSIGN TOKEN> <ASSIGNABLE DATATYPE> <OR EXPR> <ENDASSIGN TOKEN>	ASSIGN	
<OR EXPR>	<OR EXPR> <OR TOKEN> <AND EXPR>	OR	
<OR EXPR>	<AND EXPR>		<AND TOKEN>
<AND EXPR>	<AND EXPR> <AND TOKEN> <NOT EXPR>	AND	
<AND EXPR>	<NOT EXPR>		
<NOT EXPR>	<REL EXPR>		<EQUAL TOKEN> OR <LESS TOKEN> OR <LESS OR EQUAL TOKEN> OR <GREATER TOKEN> OR <GREATER OR EQUAL TOKEN> OR <UNEQUAL TOKEN>
<NOT EXPR>	<NOT TOKEN> <NOT EXPR>	NOT	
<NOT EXPR>	<NOT TOKEN> <OR EXPR>	NOT	
<REL EXPR>	<REL EXPR> <COMPARE LESS> <SUM EXPR>	LESS	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE EQUAL> <SUM EXPR>	EQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE LESS EQUAL> <SUM EXPR>	LESSEQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE GREATER> <SUM EXPR>	GREATER	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<REL EXPR>	<REL EXPR> <COMPARE GREATER EQUAL> <SUM EXPR>	GREATEREQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<REL EXPR> <COMPARE UNEQUAL> <SUM EXPR>	UNEQUAL	<MINUS TOKEN> OR <PLUS TOKEN> OR <DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<REL EXPR>	<SUM EXPR>		<MINUS TOKEN> OR <PLUS TOKEN>
<SUM EXPR>	<SUM EXPR> <PLUS TOKEN> <PRODUCT EXPR>	ADD	<DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<SUM EXPR>	<SUM EXPR> <MINUS TOKEN> <PRODUCT EXPR>	SUBTRACT	<DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<SUM EXPR>	<PRODUCT EXPR>		<DIVIDE TOKEN> OR <MULTIPLY TOKEN>
<PRODUCT EXPR>	<PRODUCT EXPR> <MULTIPLY TOKEN> <MONADIC EXPR>	MULTIPLY	
<PRODUCT EXPR>	<PRODUCT EXPR> <DIVIDE TOKEN> <MONADIC EXPR>	DIVIDE	
<MONADIC EXPR>	<NEGATE TOKEN> <OR EXPR>	NEGATE	
<MONADIC EXPR>	<NEGATE TOKEN> <MONADIC EXPR>	NEGATE	
<PRODUCT EXPR>	<MONADIC EXPR>		
<MONADIC EXPR>	<VALUE>		
<MONADIC EXPR>	<LEFTPAREN TOKEN> <OR EXPR> <RIGHTPAREN TOKEN>		
<INTO HEADER>	<INTO TOKEN> <STRING LITERAL TOKEN>	INTOSTRHDR	



<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<VALUE>	<NUMERIC LITERAL TOKEN>	NUMBER	
<VALUE>	<STRING LITERAL TOKEN>	STRING	
- <VALUE>	<DATE LITERAL TOKEN>	DATE	
<VALUE>	<DATA VALUE>		
<VALUE>	<EXISTS STMT>		
<DATA VALUE>	<TABLEFIELD>	GETTBLFLDVALUE	
<DATA VALUE>	<GLOBALFIELD>	GETGLOBVALUE	
<DATA VALUE>	<LOCALFIELD>	GETLOCVALUE	
<FIND STMT>	<FIND TOKEN> <ASSIGN FIND DATATYPE> <TABLENAME> <KEY IDENTIFIER LIST> <ENDFIND TOKEN>	FIND	
<FIND NEXT STMT>	<FIND NEXT TOKEN> <ASSIGN FIND DATATYPE> <TABLENAME> <ENDFIND TOKEN>	FINDNEXT	
<CALL STMT>	<CALL HEADER>	CALL	<CALLPARMS TOKEN>
<CALL STMT>	<CALL HEADER> <CALL PARMS STMT>	CALLWITHPARMS	
<CALL HEADER>	<CALL TOKEN> <EQUATIONTYPE TOKEN> <IDENTIFIER TOKEN>	CALLEQUATION	
<CALL HEADER>	<CALL TOKEN> <EXTERNALTYPE TOKEN> <IDENTIFIER TOKEN>	CALLEXTERNAL	

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<CALL HEADER>	<CALL TOKEN> <APPENGINE TYPE TOKEN> <IDENTIFIER TOKEN>	CALLAPPENG	
<CALL HEADER>	<CALL TOKEN> <SQLTYPE TOKEN> <IDENTIFIER TOKEN>	CALLSQL	
<CALL PARMS STMT>	<CALLPARMS TOKEN> <CALL PARM LIST> <ENDCALLPARMS TOKEN>		
<CALL PARM LIST>	<CALL PARM LIST> <CALL PARM>		
<CALL PARM LIST>	<CALL PARM>		
<CALL PARM>	<CALL LOCALFIELD>		
<CALL LOCALFIELD>	<CALL LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	CALLLOCAL	
<RETURN STMT>	<RETURN TOKEN>	RETURN	
<HALT STMT>	<HALT TOKEN>	HALT	
<MESSAGE STMT>	<MESSAGE TOKEN> <MESSAGE PARM LIST> <ENDMESSAGE TOKEN>	MSG	
- <MESSAGE PARM LIST>	<MESSAGE PARM LIST> <MESSAGE PARM>		
<MESSAGE PARM LIST>	<MESSAGE PARM>	MSGPARM	
<MESSAGE PARM>	<MSG NUMERIC LITERAL TOKEN>	MSGNUMBER	
<MESSAGE PARM>	<MSG STRING LITERAL TOKEN>	MSGSTRING	
<MESSAGE PARM>	<MSG DATE LITERAL TOKEN>	MSGDATE	

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<MESSAGE PARM>	<MSG DATA VALUE>		
<MSG DATA VALUE>	<MSG TABLEFIELD>		
<MSG DATA VALUE>	<MSG GLOBALFIELD>		
<MSG DATA VALUE>	<MSG LOCALFIELD>		
<MSG TABLENAME>	<MSG TABLETYPE TOKEN> <IDENTIFIER TOKEN>	MSGTABLENAME	
<INSERT START>	<INSERT HDR> <GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	INSGLOB	
<MSG TABLEFIELD>	<MSG TABLENAME> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	MSGTABLEFIELD	
<MSG GLOBALFIELD>	<MSG GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	MSGGLOBAL	
<MSG LOCALFIELD>	<MSG LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	MSGLOCAL	
<EXIT LOOP STMT>	<EXITLOOP TOKEN>	EXITLOOP	
<EXISTS STMT>	<EXISTS TOKEN> <EXISTS GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	EXISTSGLOBAL	
<EXISTS STMT>	<EXISTS TOKEN> <EXISTS LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	EXISTSLOCAL	
<EXISTS STMT>	<EXISTS TOKEN> <EXISTS TABLETYPE TOKEN> <IDENTIFIER TOKEN>	EXISTSTABLE	
<ASSIGNABLE DATATYPE>	<ASGN GLOBALFIELD>		

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<ASSIGNABLE DATATYPE>	<ASGN LOCALFIELD>		
<ASSIGN FIND DATATYPE>	<FIND GLOBALFIELD>		
<ASSIGN FIND DATATYPE>	<FIND LOCALFIELD>		
<INSERT START>	<INSERT HDR> <TABLETYPE TOKEN> <IDENTIFIER TOKEN>	INSTABLE	
<DELETE START>	<DELETE HDR> <TABLETYPE TOKEN> <IDENTIFIER TOKEN>	DELTABLE	
<UPDATE START>	<UPDATE HDR> <TABLETYPE TOKEN> <IDENTIFIER TOKEN>	UPDTABLE	
<TABLENAME>	<TABLETYPE TOKEN> <IDENTIFIER TOKEN>	TABLENAME	
<TABLEFIELD>	<TABLENAME> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	TABLEFIELD	
<GLOBALFIELD>	<GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	GLOBALFIELD	
<ASGN GLOBALFIELD>	<ASGN GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	ASGNGLOBAL	
<LOCALFIELD>	<LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	LOCALFIELD	
<FIND LOCALFIELD>	<FIND LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	FINDLOCAL	
<FIND GLOBALFIELD>	<FIND GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>	FINDGLOBAL	
<ASGN LOCALFIELD>	<ASGN LOCALTYPE TOKEN> <IDENTIFIER TOKEN>	ASGNLOCAL	

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<KEY IDENTIFIER LIST>	<KEY IDENTIFIER LIST> <KEY IDENTIFIER>		
<KEY IDENTIFIER LIST>	<KEY IDENTIFIER>		
<KEY IDENTIFIER>	<KEY LOCAL EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYLOCEQ	
<KEY IDENTIFIER>	<KEY LOCAL GREATER TOKEN> <IDENTIFIER TOKEN>	KEYLOCGT	
<KEY IDENTIFIER>	<KEY LOCAL GREATER EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYLOCGE	
<KEY IDENTIFIER>	<KEY GLOBAL EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYGLOBEQ	
<KEY IDENTIFIER>	<KEY GLOBAL GREATER TOKEN> <IDENTIFIER TOKEN>	KEYGLOBGT	
<KEY IDENTIFIER>	<KEY GLOBAL GREATER EQUAL TOKEN> <IDENTIFIER TOKEN>	KEYGLOBGE	
<COMPARE LESS>	<LESS TOKEN>		
<COMPARE LESS EQUAL>	<LESS OR EQUAL TOKEN>		
<COMPARE EQUAL>	<EQUAL TOKEN>		
<COMPARE GREATER>	<GREATER TOKEN>		
<COMPARE GREATER EQUAL>	<GREATER OR EQUAL TOKEN>		
<COMPARE UNEQUAL>	<UNEQUAL TOKEN>		
<THEN PHRASE>	<THEN TOKEN>	THEN	
<ELSE PHRASE>	<ELSE TOKEN>	ELSE	
<ELSIF PHRASE>	<ELSIF TOKEN>	ELSIF	

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<SKIP STMT>	<SKIP TOKEN>	NONE	
<TRACE STMT>	<TRACE TOKEN> <TRACE SQL TOKEN> <TRACE ON OR OFF>	TRACESQL	
<TRACE STMT>	<TRACE TOKEN> <TRACE PCODE TOKEN> <TRACE ON OR OFF>	TRACEPCODE	
<TRACE STMT>	<TRACE TOKEN> <TRACE SOURCE TOKEN> <TRACE ON OR OFF>	TRACESOURCE	
<TRACE ON OR OFF>	<ON TOKEN>	TRACEON	
<TRACE ON OR OFF>	<OFF TOKEN>	TRACEOFF	
<DELETE STMT>	<DELETE START> <STMT BLOCK> <DELETE END>	DEL	
<DELETE STMT>	<DELETE START> <DELETE END>	DEL	
<DELETE STMT>	<DELETE START> <STMT BLOCK> <CHOOSE CLAUSE> <DELETE END>	DEL	
<DELETE STMT>	<DELETE START> <CHOOSE CLAUSE> <DELETE END>	DEL	
<DELETE HDR>	<DELETE TOKEN>	DELHDR	
<DELETE END>	<WHERE TOKEN> <WHERE EXPR LIST> <ENDDELETE TOKEN>		
<DELETE END>	<ENDDELETE TOKEN>		
<INSERT STMT>	<INSERT START> <STMT BLOCK> <INTO LIST> <INSERT END>	INS	
<INSERT STMT>	<INSERT START> <INTO LIST> <INSERT END>	INS	

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<INSERT STMT>	<INSERT START> <STMT BLOCK> <INTO LIST> <CHOOSE CLAUSE> <INSERT END>	INS	
<INSERT STMT>	<INSERT START> <INTO LIST> <CHOOSE CLAUSE> <INSERT END>	INS	
<INSERT HDR>	<INSERT TOKEN>	INSHDR	
<INSERT END>	<WHERE TOKEN> <WHERE EXPR LIST> <ENDINSERT TOKEN>		
<INSERT END>	<ENDINSERT TOKEN>		
<INTO LIST>	<INTO LIST> <INTO CLAUSE>		
<INTO LIST>	<INTO CLAUSE>		
<RESTORE STMT>	<RESTORE TOKEN> <GLOBALSPACE ID> <GLOBALSPACE FIELD LIST> <ENDRESTORE TOKEN>	RESTORE	
<RESTORE STMT>	<RESTORE TOKEN> <GLOBALSPACE ID> <ENDRESTORE TOKEN>	RESTORE	
<SAVE STMT>	<SAVE TOKEN> <GLOBALSPACE ID> <GLOBALSPACE FIELD LIST> <ENDSAVE TOKEN>	SAVE	
<SAVE STMT>	<SAVE TOKEN> <GLOBALSPACE ID> <ENDSAVE TOKEN>	SAVE	
<UPDATE STMT>	<UPDATE START> <STMT BLOCK> <SETFIELD LIST> <UPDATE END>	UPD	

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<UPDATE STMT>	<UPDATE START> <SETFIELD LIST> <UPDATE END>	UPD	
<UPDATE STMT>	<UPDATE START> <STMT BLOCK> <SETFIELD LIST> <CHOOSE CLAUSE> <UPDATE END>	UPD	
<UPDATE STMT>	<UPDATE START> <SETFIELD LIST> <CHOOSE CLAUSE> <UPDATE END>	UPD	
<UPDATE HDR>	<UPDATE TOKEN>	UPDHDR	
<UPDATE END>	<WHERE TOKEN> <WHERE EXPR LIST> <ENDUPDATE TOKEN>		
<UPDATE END>	<ENDUPDATE TOKEN>		
<GLOBALSPACE FIELD LIST>	<GLOBALSPACE FIELD LIST> <GLOBALSPACE FIELD>	GBLSPCFIELD	
<GLOBALSPACE FIELD LIST>	<GLOBALSPACE FIELD>	GBLSPCFIELD	
<WHERE EXPR LIST>	<WHERE EXPR LIST> <WHERE EXPR TOKEN>	WHEREEXPR	
<WHERE EXPR LIST>	<WHERE EXPR TOKEN>	WHEREEXPR	
<CHOOSE CLAUSE>	<CHOOSE TOKEN> <EQUATIONTYPE TOKEN> <IDENTIFIER TOKEN>	CHOOSE	
<INTO CLAUSE>	<INTO HEADER> <FROM CLAUSE>	INTO	
<INTO HEADER>	<INTO TOKEN> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	INTOFLDHDR	
<FROM CLAUSE>	<FROM TOKEN> <OR EXPR>		



<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<SETFIELD LIST>	<SETFIELD LIST> <SETFIELD CLAUSE>		
<SETFIELD LIST>	<SETFIELD CLAUSE>		
<SETFIELD CLAUSE>	<SETFIELD HDR> <OR EXPR>	SETFIELD	
<SETFIELD HDR>	<SET TOKEN> <FIELDTYPE TOKEN> <IDENTIFIER TOKEN>	SETFLDHDR	
<GLOBALSPACE FIELD>	<SPACE GLOBALTYPE TOKEN> <IDENTIFIER TOKEN>		
<GLOBALSPACE ID>	<SPACENAME STRINGTYPE TOKEN> <IDENTIFIER TOKEN>	GBLSPACEID	
*** TOKENS ***			
<AND TOKEN>	AND		
<APPENGINETYPE TOKEN>	APEN		
<ASGN GLOBALTYPE TOKEN>	G but it is bracketed by ASSIGN/END ASSIGN		
<ASGN LOCALTYPE TOKEN>	L but it is bracketed by ASSIGN/END ASSIGN		
<ASSIGN TOKEN>	ASSIGN		
<CALL TOKEN>	CALL		
<CALL LOCALTYPE TOKEN>	L but it is bracketed by CALLPARMS/END CALLPARMS		
<CALLPARMS TOKEN>	CALLPARMS		
<CHOOSE TOKEN>	CHOOSE		
<DATE LITERAL TOKEN>	D followed by a number		
<DELETE TOKEN>	DELETE		

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<DIVIDE TOKEN>	/		
<ELSE TOKEN>	ELSE	Update address of false jump. Push truejump address placeholder.	
<ELSIF TOKEN>	ELSIF		
<ENDASSIGN TOKEN>	END ASSIGN		
<ENDCALLPARMS TOKEN>	END CALLPARMS		
<ENDDELETE TOKEN>	END DELETE		
<ENDFIND TOKEN>	END FIND		
<ENDIF TOKEN>	END IF	Update address of false jump, true jump, or both.	
<ENDINSERT TOKEN>	END INSERT		
<ENDLOOP TOKEN>	END LOOP	Update addresses of exitloop jumps.	
<ENDMESSAGE TOKEN>	END MESSAGE		
<ENDPROGRAM TOKEN>	END PROGRAM		
<ENDRESTORE TOKEN>	END RESTORE		
<ENDSAVE TOKEN>	END SAVE		
<ENDUPDATE TOKEN>	END UPDATE		
<EQUAL TOKEN>	=		
<EQUATIONTYPE TOKEN>	E		
<EXISTS GLOBALTYPE TOKEN>	G but it is preceded by EXISTS		
<EXISTS LOCALTYPE TOKEN>	L but it is preceded by EXISTS		

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<EXISTS TABLETYPE TOKEN>	T but it is preceded by EXISTS		
<EXISTS TOKEN>	EXISTS		
<EXITLOOP TOKEN>	EXIT LOOP	Push placeholder jump for exitloop.	
<EXTERNALTYPE TOKEN>	X		
<FIELDTYPE TOKEN>	F		
<FIND GLOBALTYPE TOKEN>	G but it is bracketed by FIND/END FIND		
<FIND LOCALTYPE TOKEN>	L but it is bracketed by FIND/END FIND		
<FIND NEXT TOKEN>	FIND NEXT		
<FIND TOKEN>	FIND		
<FROM TOKEN>	FROM		
<GLOBALTYPE TOKEN>	G		
<GREATER OR EQUAL TOKEN>	>=		
<GREATER TOKEN>	>		
<HALT TOKEN>	HALT		
<IDENTIFIER TOKEN>	NONE		
<IF TOKEN>	IF		
<INSERT TOKEN>	INSERT		
<INTO TOKEN>	INTO		
<KEY GLOBAL EQUAL TOKEN>	KGEQ		

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<KEY GLOBAL GREATER EQUAL TOKEN>	KGGE		
<KEY GLOBAL GREATER TOKEN>	KGGT		
<KEY LOCAL EQUAL TOKEN>	KLEQ		
<KEY LOCAL GREATER EQUAL TOKEN>	KLGE		
<KEY LOCAL GREATER TOKEN>	KLGT		
<LEFTPAREN TOKEN>	(		
<LESS OR EQUAL TOKEN>	<=		
<LESS TOKEN>	<		
<LOCALTYPE TOKEN>	L		
<LOOP TOKEN>	LOOP		
<MESSAGE TOKEN>	MESSAGE		
<MINUS TOKEN>	- but prior token is a number, identifier, or left parenthesis		
<MSG DATE LITERAL TOKEN>	D but it is bracketed by MESSAGE/END MESSAGE		
<MSG GLOBALTYPE TOKEN>	G but it is bracketed by MESSAGE/END MESSAGE		
<MSG LOCALTYPE TOKEN>	L but it is bracketed by MESSAGE/END MESSAGE		
<MSG NUMERIC LITERAL TOKEN>	Bracketed by MESSAGE/END MESSAGE		

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<MSG STRING LITERAL TOKEN>	Bracketed by MESSAGE/END MESSAGE		
<MSG TABLETYPE TOKEN>	T but it is bracketed by MESSAGE/END MESSAGE		
<MULTIPLY TOKEN>	*		
<NEGATE TOKEN>	- but prior token is not a number, identifier, or left parenthesis		
<NOT TOKEN>	NOT		
<NUMERIC LITERAL TOKEN>	N followed by a number		
<OFF TOKEN>	OFF		
<ON TOKEN>	ON		
<OR TOKEN>	OR		
<PLUS TOKEN>	+		
<RESTORE TOKEN>	RESTORE		
<RETURN TOKEN>	RETURN		
<RIGHTPAREN TOKEN>	)		
<SAVE TOKEN>	SAVE		
<SET TOKEN>	SET		
<SKIP TOKEN>	SKIP		
<SPACE GLOBALTYPE TOKEN>	G but bracketed by SAVE/END SAVE or RESTORE/END RESTORE		
<SPACENAME STRINGTYPE TOKEN>	S but bracketed by SAVE/END SAVE or RESTORE/END RESTORE		

<b>Parse Object</b>	<b>Elaboration</b>	<b>Code Gen</b>	<b>Look Ahead (Skip reduction if next token is . . .)</b>
<SQLTYPE TOKEN>	SQL		
<STRING LITERAL TOKEN>	S or V followed by a string		
<TABLETYPE TOKEN>	T		
<THEN TOKEN>	THEN	False jump to placeholder address.	
<TRACE PCODE TOKEN>	PCODE		
<TRACE SOURCE TOKEN>	SOURCE		
<TRACE SQL TOKEN>	SQL but prior token is a trace token		
<TRACE TOKEN>	TRACE		
<UNEQUAL TOKEN>	<>		
<UPDATE TOKEN>	UPDATE		
<WHERE EXPR TOKEN>	Anything between a WHERE token and one of END INSERT, END DELETE, or END UPDATE.		
<WHERE TOKEN>	WHERE		

---

## Equation Engine Security

This section discusses the components of PeopleSoft Equation Engine security and how to implement them at your site.

### Components of Equation Engine Security and Their Implementation

The following topics describe the components involved in Equation Engine security and how to implement Equation Engine security at your site.

## Security Features

Equation Engine security features:

- Provide different levels of access (authorizations) to the equation objects based indirectly on the user identification (user ID). The three levels of access are:
  - Execute.
  - Read (contains Execute).
  - Write (contains Execute and Read).
- Provide a hierarchy (tree) of classes (user profile values) that are associated with the user ID.
- Associate different authorizations with different user profile values.
- Maintain the authorizations using the equation security trees.

## User IDs and User Profiles

A user signs on to the database with a user ID. The ID is associated with zero or more user profile types, each of which is associated with exactly one user profile value. The types are:

<i>Profile Type</i>	<i>Description</i>	<i>Controls Access To</i>
EQD	Equation Data Auth Class	Table and View Data
EQN	Equation Name Auth Class	Equations
EQS	Equation SQL Auth Class	Callable SQL
EQX	Equation External Subroutine Auth Class	External Subroutines

Each user profile type has a controlling tree that determines the hierarchy of user profile values. For example, the highest root access would be PUBLIC, under which could be FIN AID ADMINS. User ID PS could be associated with FIN AID ADMINS under user profile type EQN.

Another user ID might be associated with PUBLIC. The hierarchy for EQN does not have to be the same as the hierarchy for EQS, EQD, or EQX. Each hierarchy can be different.

You might add a DEVELOPER class for EQN under FIN AID ADMINS in which only one FIN AID ADMINS user is included. You can set this user's access to WRITE, whereas all other FIN AID ADMINS have READ access to equations. Note that read-only access to an equation means that it cannot be viewed or modified from the Equation Engine component. Instead, it can be viewed only from the Equation View component.

You should not modify the user profile types. However, you must modify the user profile values using the tree structures and assign those values to various user IDs as appropriate.

## User Profile Values

Just as each user ID in the system is associated with a Permission List (for example, ALLPANLS), each user profile type for each user can have one value associated with it (for example, PUBLIC). Initially, one is provided: PUBLIC. However, you are strongly encouraged to create your own new user profile values using the equation security trees. If a user ID does not have a user profile type and value set for it, then Equation Engine assumes a user profile value of PUBLIC by default.

## Equation Security Trees

Use Tree Manager to maintain the equation security trees.

Select Tree Manager, Use, Tree Manager, Tree Manager. The following page shows the Tree Name in Tree Manager.

### Tree Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Tree](#)
[Create New Tree](#)

---

Search by:  begins with

[Advanced Search](#)

### Search Results

View All First  1-4 of 4  Last

Tree Name	SetID	Set Control Value	Effective Date	Tree Branch	Description	Category	Valid Tree
<a href="#">EQTN_IDAUTH_TREE</a>	(blank)	(blank)	01/01/1900	(blank)	Equation ID Auth Tree	EQUATIONS	Valid Tree
<a href="#">EQTN_SQAUTH_TREE</a>	(blank)	(blank)	01/01/1900	(blank)	Equation SQL Auth Tree	EQUATIONS	Valid Tree
<a href="#">EQTN_TBAUTH_TREE</a>	(blank)	(blank)	01/01/1900	(blank)	Equation Table Auth Tree	EQUATIONS	Valid Tree
<a href="#">EQTN_XTAUTH_TREE</a>	(blank)	(blank)	01/01/1900	(blank)	Equation Extern Sub Auth Tree	EQUATIONS	Valid Tree

Tree Manager, Tree Names example

The following page is an example of a view of Public Access in the equation security tree.

### Tree Manager



**SetID:** **Last Audit:** Valid Tree  
**Effective Date:** 01/01/1900 **Status:** Active  
**Tree Name:** EQTN\_TBAUTH\_TREE Equation Table Auth Tree

---

[Save As](#) [Close](#) [Tree Definition](#) [Display Options](#) [Print Format](#)

---

|   First Page  1 of 1  Last Page

 [PUBLIC - Everyone has access to public](#) 

Tree Manager page, PUBLIC Access Example



If you click the Insert Child Node icon to the right of PUBLIC and add a new node underneath it, this is the result:

### Insert Child Node

**\*Tree Node:**

Add
Cancel

Insert Child Node page

**Eqtn Ext Auth:** FINANCIAL AID ADMIN

**Description:**

**Comments:**

*External	*Auth Level	Authorization Propagation Type		
<input style="width: 100%;" type="text" value="FAPEQSST"/>	Execute	No Propagation	+	-

Equation Table Authorization page

The screenshot displays the Oracle Tree Manager interface. On the left is a navigation menu with various system components. The main area shows the 'Tree Manager' for 'EQTN\_TBAUTH\_TREE'. It includes fields for SetID, Effective Date, Last Audit, Status, and Tree Name. Below this are action buttons like 'Save Draft', 'Save', 'Save As', and 'Close'. A search bar with 'Collapse All', 'Expand All', and 'Find' options is present. The tree structure shows two nodes: 'PUBLIC - Everyone has access to public' and 'FIN AID ADMINS - Financial Aid Administrators'. A red pencil icon next to the 'PUBLIC' node indicates it is selected for editing. A 'Notify' button is also visible.

Tree Manager page, Child Node Example

You click a tree node to select it, and then you click the red pencil icon (Edit Data) to view or modify the access settings for the selected tree node.

If you add new nodes here, then these new node names within the tree are added to the list of valid values that can be selectable as user profile type values for the user profile type associated with the tree structure being modified. Design your security tree structure to reflect the security needs within your organization based upon who needs what kind of access to which kinds of equation objects. Only the security administrator should have update access to edit these equation security tree structures and their associated lists of equation objects.

<b>Eqtn Ext Auth:</b>	PUBLIC
<b>Description:</b>	Everyone has access
<b>Comments:</b>	Public access

*External	*Auth Level	Authorization Propagation Type		
FAPEQCPL	Read	No Propagation	+	-
FAPEQDDF	Execute	No Propagation	+	-
FAPEQINT	Write	No Propagation	+	-
FAPEQSST	Execute	No Propagation	+	-

### Equation Table Authorization page, Authorization examples

If a table has read authorization, then it can be used in FIND statements and table field references in expressions. If a table has write authorization, then it can also be referenced in the DELETE, INSERT, and UPDATE mass action statements.

To simplify access maintenance, select an Authorization Propagation type from the Authorization Propagation Type drop-down list box.

This table describes the Authorization Propagation Type values:

Value	Description
Append Auth To All Child Nodes	When you click the Save button, the authorization of the equation object is added to all child nodes of the current node that do not already have an access type assigned.
Delete Auth In All Child Nodes	When you click the Save button, the authorization of the equation object is removed from all child nodes, regardless of the previous access assigned.
Replace Auth In All Child Nodes	When you click the Save button, the authorization of the equation object is set within all child nodes, regardless of the previous access assigned.

If you delete or rename an equation node from the tree manager, the underlying authorizations should be deleted automatically. If they are not, complete these steps to correct the error and to begin an analysis of the problem.

To correct the error, run the Application Engine process named SCC\_EQAUTPUR.

1. Navigate to PeopleTools > Application Engine > Request AE.
2. Add a run control for SCC\_EQAUTPUR, select process frequency *Always*, and click RUN.
3. Select your process server, select the process named SCC\_EQAUTPUR, and click the OK button.

4. Navigate to the process monitor and verify that the process ran successfully.

This process purges the authorizations that are no longer associated with any tree nodes.

To analyze the cause of the problem, navigate to PeopleTools > Integration Broker > Service Operations Monitor > Monitoring > Asynchronous Services and complete these steps:

1. Look in the TREE\_MAINT queue.
2. Verify that all the transactions in the TREE\_MAINT queue are at *Done* status.
3. Select the Subscription Contracts tab.
4. Change the Node Name value to the default local node.
5. Change the Service Operation value to *TREE\_CHANGE*.
6. Change the Queue Name value to *TREE\_MAINT*.
7. Select the *Done* status.
8. Click the Refresh button.
9. Click the Details link of the most recent transaction.

The Asynchronous Details page for that transaction appears. The Action Name value should be *Equation\_Auth\_Change\_Handler* and the status should be *Done*.

If so, then the orphan equation authorization node leaves should have been automatically purged when the equation authorization node was deleted or renamed in tree manager. If the status of the transaction is not *Done*, then correct your Application Messaging environment.

### **Authorization Levels**

EQN (user profile type) authorizations of type WRITE permit a user to update an equation. Therefore, the authorization class is used in the search record for the Equations page.

Select Set Up SACR, Common Definitions, Equation Engine, Equation Editor.

### Equation Editor

Enter any information you have and click Search. Leave fields blank for a list of all values.

Equation Id Auth Class: PUBLIC

Equation Name:

Description:

Include History
  Correct History
  Case Sensitive

[Basic Search](#)

### Search Results

View All First  1-17 of 17  Last

Equation Name	Description	Data Type Description
<a href="#">ADADPSDELAPP</a>	<a href="#">Pop Sel AD Appl Delete</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG04</a>	<a href="#">GBA Confirmation by the School</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG06</a>	<a href="#">Address Change</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG10</a>	<a href="#">Prior Education Verification</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG19</a>	<a href="#">19 Payment of Fees</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG20</a>	<a href="#">Payment of fees</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31B</a>	<a href="#">Confirm Enrollment in Program</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31C</a>	<a href="#">Confirm re-enrollment in Pqm</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31H</a>	<a href="#">Non First Year AdmissResult</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31I</a>	<a href="#">Professional duties</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31J</a>	<a href="#">Language Test Requirement</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31K</a>	<a href="#">Prior Education Deficiency</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31N</a>	<a href="#">Lot Drawing Result</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31O</a>	<a href="#">Change of fields</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG31P</a>	<a href="#">Profession Requirements</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDSLMSG37</a>	<a href="#">Death of Student check</a>	<a href="#">Demonstration Data</a>
<a href="#">ADDPSCARTRM</a>	<a href="#">Pop Sel AD Prosp Del Car Term</a>	<a href="#">Demonstration Data</a>

#### Equation Editor Search Results page

The authorization class pertaining to equation names for the logged-in user ID (in this case, PUBLIC) is already supplied on the search page. When you click the Search button, the system displays a list of equations and equation descriptions that any user with PUBLIC access can update.

Select Set Up SACR, Common Definitions, Equation Engine, Review Equations.

### Equation View

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

Equation Id Auth Class: PUBLIC

Equation Name:

[Basic Search](#)

### Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All      First  1-100 of 300  Last

Equation Name	Description
<a href="#">ADADPSDELAPP</a>	<a href="#">Pop Sel AD Appl Delete</a>
<a href="#">ADDSLMSG04</a>	<a href="#">GBA Confirmation by the School</a>
<a href="#">ADDSLMSG06</a>	<a href="#">Address Change</a>
<a href="#">ADDSLMSG10</a>	<a href="#">Prior Education Verification</a>
<a href="#">ADDSLMSG19</a>	<a href="#">19 Payment of Fees</a>
<a href="#">ADDSLMSG20</a>	<a href="#">Payment of fees</a>
<a href="#">ADDSLMSG31B</a>	<a href="#">Confirm Enrollment in Program</a>
<a href="#">ADDSLMSG31C</a>	<a href="#">Confirm re-enrollment in Pgm</a>
<a href="#">ADDSLMSG31H</a>	<a href="#">Non First Year AdmissResult</a>
<a href="#">ADDSLMSG31I</a>	<a href="#">Professional duties</a>
<a href="#">ADDSLMSG31J</a>	<a href="#">Language Test Requirement</a>
<a href="#">ADDSLMSG31K</a>	<a href="#">Prior Education Deficiency</a>
<a href="#">ADDSLMSG31N</a>	<a href="#">Lot Drawing Result</a>
<a href="#">ADDSLMSG31O</a>	<a href="#">Change of fields</a>
<a href="#">ADDSLMSG31P</a>	<a href="#">Profession Requirements</a>
<a href="#">ADDSLMSG37</a>	<a href="#">Death of Student check</a>
<a href="#">ADPDPSCARTRM</a>	<a href="#">Pop Sel AD Prosp Del Car Term</a>

### Equation View page

In the Equation View search page, only equations that the user ID has write or read access appear.

In a similar way, the EQD user profile type provides a control point for access to tables and views that you are allowed to read when you create an equation. The EQS user profile type provides controls for determining which callable SQL you can invoke, and the EQX user profile type establishes a control point for determining which external subroutines you can call when you create an equation.

### User Profiles

Equation Security is based on the user profile tools construct that comes with tools.

You will probably not modify the user profile type because it is tied to a program logic. However, you are required to change the profile type values within each type, assigning a value for each type for each user ID. The valid type values are the names of the tree nodes associated with the type.

## User Profile Types

Each user profile type represents an entire set of user profile values; each user profile type is used for a particular application purpose. Normally, when a user signs on, he or she is assigned to roles and permissions lists, which determine the user's menu access. To assign users to different user profile values that do not necessarily correspond to roles and permission lists, you must use user profile types.

Select PeopleTools, Security, Security Objects, User Profile Types.

### User Profile Types

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

---

Search by: ID Type begins with

[Search](#)
[Advanced Search](#)

#### Search Results

View All    First ◀ 1-14 of 14 ▶ Last

ID Type	Description
<a href="#">BID</a>	Bidder
<a href="#">CNT</a>	Customer Contact
<a href="#">CST</a>	Customer
<a href="#">EJA</a>	External Job Applicant
<a href="#">EMP</a>	Employee
<a href="#">EQD</a>	Equation Data Auth Classes
<a href="#">EQN</a>	Equation Name Auth Classes
<a href="#">EQS</a>	Equation Sql Auth Classes
<a href="#">EQX</a>	Equation External Auth Classes
<a href="#">NON</a>	None
<a href="#">ORG</a>	Org ID
<a href="#">PER</a>	Person
<a href="#">PTN</a>	Partner ID
<a href="#">VND</a>	Vendor

User Profile Types page (1 of 2)

Although you would not change the user profile types, this page shows the profile types for Equation Engine:

## User Profile Types

ID Type: EQN  Enabled?

\*Description:  \*Sequence number:

Long Description:

Field Information			
*Field Name	*Record (Table) Name	Description	Fieldname
1 OPRALIASVALUE	EQTN_IDAUTH_VW		

User Profile Types page (2 of 2)

Access the User Profiles, ID tab (PeopleTools, Security, User Profiles, User Profiles).

General **ID** Roles Workflow Audit Links User ID Queries

User ID: PS

Description: [PS] Peoplesoft Superuser

### ID Types and Values

Find | View All First 1 of 1 Last

ID Type:

Attribute Name	Attribute Value	Description
EmplID	<input type="text" value="K0G007"/>	Drake, Marilyn

### User Description

Description:

[Set Description](#) or type in User Description.

User Profile page , ID tab

When you select the User Profile ID, the system displays the descriptions shown on the previous page.

On this page, you can add equation user profile types and select a user profile value for each one that you add.



## Appendix C

# Campus Solutions Application Fundamentals Reports

This appendix provides an overview of the reports included in the Application Fundamentals for Campus Solutions and enables you to:

- View summary tables of all reports.
- View report details and tables accessed for selected reports.

---

**Note.** For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

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## Campus Solutions Application Fundamentals Reports: A to Z

These tables list the reports associated with processes described in this PeopleBook. The reports listed are Crystal and SQR reports and are sorted by Report ID.

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**Note.** On June 1, 2011, Oracle discontinued distribution of SAP's Business Objects Enterprise and Crystal Reports with PeopleTools.

Existing customers may use Business Objects Enterprise and Crystal Reports licenses previously received from Oracle.

Customers who wish to use future versions of Business Objects and Crystal Reports products with PeopleSoft will need to obtain appropriate license and support directly from SAP/Business Objects.

---

This section discusses:

- General installation reports.
- Student Financials security reports.
- Academic institution and Student Records setup reports.

### **See Also**

[Appendix C, "Campus Solutions Application Fundamentals Reports," Campus Solutions Application Fundamentals Reports: Selected Reports, page 557](#)

## General Installation Reports

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
CCDATADC Data Dictionary – Student Administration	Lists, alphabetically by field name, all fields in Campus Solutions, including the description, type, size, and format of each field.	Set Up SACR, Product Related, Student Records, Reports, Data Dictionary	PRCSRUNCNTL
PER702 Installation Table	Lists the information that you defined in the Installation Table component.	Set Up HRMS, Install, Installation Table Report	PRCSRUNCNTL
Per708 Country Table	Lists the country description and address formats that you defined in the Country Table component.	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL

## PeopleSoft Student Financials Security Reports

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SF800 Business Unit Permission List	Lists the business units that you associated with each permission list on the Perm List – Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Business Unit	PRCSRUNCNTL_SF
SF801 Business Unit User ID	Lists the business units that you associated with each user ID on the User ID – Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Business Unit	PRCSRUNCNTL_SF
SF802 Cashier's Office Permission List	Lists the cashier offices for each business unit that you associated with a permission list on the Perm List – Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Report, Cashier Office	PRCSRUNCNTL_SF
SF803 Cashier's Office User ID	Lists the cashier offices for each business unit that you associated with each user ID on the User ID – Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Report, Cashier Office	PRCSRUNCNTL_SF

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SF804 Credit Card Permission List	Lists the permission lists you gave access to view the entire credit card number on the Perm List – Credit Card page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Credit Card	PRCSRUNCNTL_SF
SF805 Credit Card User ID	Lists the user IDs you gave access to view the entire credit card number on the User ID – Credit Card page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Credit Card	PRCSRUNCNTL_SF
SF806 Company Permission List	Lists the companies that you associated with each permission list on the Perm List – Company page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Company	PRCSRUNCNTL_SF
SF807 Company User ID	Lists the companies that you associated with each user ID on the User ID – Company page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Company	PRCSRUNCNTL_SF
SF808 General Setup	Lists the Security Views defined and then lists the Security Options that you defined for Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Process, General Setup Report	PRCSRUNCNTL_SF
SF809 Item Type Permission List	Lists the item types and item type tree nodes that you associated with each permission list on the Perm List – Item Type page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Item Type	PRCSRUNCNTL_SF
SF810 Item Type User ID	Lists the item types that you associated with each user ID on the User ID – Item Type page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Item Type	PRCSRUNCNTL_SF
SF811 SetID Permission List	Lists the setIDs that you associated with each permission list on the Perm List – SetID page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, SetID	PRCSRUNCNTL_SF

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SF812 SetID User ID	Lists the set IDs that you associated with each user ID on the User ID – SetID page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, SetID	PRCSRUNCNTL_SF

## Academic Institution and PeopleSoft Student Records Setup Reports

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SR701 Institution Table	Lists all academic institutions, including detailed information about each academic institution. This report references fields as defined on the Academic Institution 1 page and the Academic Institution 2 page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Institution Table	PRCSRUNCNTL
SR702 CIP Report	Lists all of the defined CIP codes in Campus Solutions, including the effective date, description and formal description of each code. This report references fields as defined on the CIP Code Table (Classification of Instructional Programs code table) page.	Set Up SACR, Foundation Tables, Reporting Codes, Classification Code Reports, CIP Table	PRCSRUNCNTL
SR703 Hegis Code Report	Lists all of the defined HEGIS codes in Campus Solutions, including the effective date, description and formal description of each code. This report references fields as defined on the HEGIS Code Table page.	Set Up SACR, Foundation Tables, Reporting Codes, Classification Code Reports, Hegis Code Table	PRCSRUNCNTL
SR722 Time Period Report	Lists all defined time periods in Campus Solutions, including setID, academic career, time period code, description, and short description. This report references fields as defined on the Time Period Table page.	Set Up SACR, Product Related, Student Records, Reports, Time Period Table	PRCSRUNCNTL

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SR723 Academic Career Report	Lists, by academic institution, the academic careers within an academic institution, including detail about each academic career. This report references fields as defined on the Academic Career Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Career Table	PRCSRUNCNTL
SR723a Academic Career Pointers Report	Lists, by academic institution, the academic careers within each academic career, including detail about each academic career. This report references fields as defined on the Academic Career Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Career Pointers	PRCSRUNCNTL
SR724 Academic Organization Report	Lists alphabetically the defined academic organizations in Campus Solutions, including details about each academic organization. This report references fields as defined on the Academic Organization Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Organization Table	PRCSRUNCNTL
SR724a Academic Organization FS Owner Report	Lists alphabetically the defined academic organizations in Campus Solutions, including details about each academic organization and the financial support owners. This report references fields as defined on the Academic Organization FS Owner (academic organization financial support owner) page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Acad Organization FS Owner	PRCSRUNCNTL

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SR724b Academic Organization HR Owner Report	Lists alphabetically the defined academic organizations in Campus Solutions, including details about each academic organization and the human resources owners. This report references fields as defined on the Academic Organization HR Owner (academic organization human resources owner) page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Acad Organization HR Owner	PRCSRUNCNTL
SR725 Academic Group Report	Lists, by academic institution, the academic groups within an academic institution, including the effective date, description, short description, student specific permissions, and auto enroll from wait list. This report references fields as defined on the Academic Group Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Group Table	PRCSRUNCNTL
SR725a Course Career Catalog Nbr Range Report	Lists, by academic institution, the academic groups within an academic institution, including the effective date, description, short description, student specific permissions, and auto enroll from wait list. This report also includes the academic careers and catalog number contained within each academic group. This report references fields as defined on the Academic Group Table page and the Academic Career Level Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Career Level Table	PRCSRUNCNTL

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SR726 Subject Report	Lists, by academic institution, the subject areas within an academic institution, including the effective date, description, short description, formal description, academic organization, split ownership, and external subject area. This report references fields as defined on the Academic Subject Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Subject Table	PRCSRUNCNTL
SR726a Subject Owner Report	Lists, by academic institution, the subject areas within an academic institution, including detail about the subject areas, and the academic organizations that own the subject areas through split ownership. This report references fields as defined on the Academic Subject Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Subject Owner Table	PRCSRUNCNTL
SR728a Term and Session Report	Lists all the defined terms and sessions in Campus Solutions, including detailed information about each term and session. This report references fields as defined on the Term Table page and the Session Table page.	Set Up SACR, Foundation Tables, Term Setup, Reports, Term and Session	PRCSRUNCNTL
SR729 Academic Calendar Report	Lists all the defined academic calendars in Campus Solutions, with detailed information about each. This report references fields as defined on the Term Calendar 1 page of the Academic Calendar component.	Set Up SACR, Foundation Tables, Term Setup, Reports, Academic Calendar Table	PRCSRUNCNTL

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SR729a Academic Calendar Term Report	Lists all terms with defined academic calendars in Campus Solutions, with detailed information about each term's academic calendar. This report references fields as defined on these pages of the Academic Calendar component: Term Calendar 1, Term Calendar 2, Term Calendar 3.	Set Up SACR, Foundation Tables, Term Setup, Reports, Academic Cal Term Table	PRCSRUNCNTL
SR729b Academic Calendar Session Report	Lists all sessions with defined academic calendars in Campus Solutions, with detailed information about each session's academic calendar. This report references fields as defined on these pages of the Academic Calendar component: Session Calendar 1, Session Calendar 2.	Set Up SACR, Foundation Tables, Term Setup, Reports, Academic Cal Session Table	PRCSRUNCNTL
SR730 Academic Program Report	Lists all defined academic programs in Campus Solutions, including detailed information about each academic program. This report references fields as defined on these pages of the Academic Program Table component: Program 1, Program 2, Taxonomy.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Program Table	PRCSRUNCNTL
SR730a Academic Program Owner Report	Lists all defined academic programs in Campus Solutions, including detailed information about each academic program and detailed information about academic organization ownership. This report references fields as defined on these pages of the Academic Program Table component: Program 1, Program 2, Taxonomy.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Program Owner	PRCSRUNCNTL



<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SR730b Home Campus Report	Lists all defined academic programs in the system, including detailed information about each academic institution and information about campuses linked to each academic institution. This report references fields as defined on these pages of the Academic Program Table component: Program 1, Program 2, Owner, Taxonomy, Campus.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Home Campus Table	PRCSRUNCNTL
SR731 Academic Plan Report	Lists all defined academic plans in Campus Solutions, including detailed information about each academic plan. This report references fields as defined on these pages of the Academic Plan Table component: Academic Plan Table, Academic Plan Print Options, Academic Plan Taxonomy.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Plan Table	PRCSRUNCNTL
SR731a Academic Plan Owner Report	Lists all defined academic plans in Campus Solutions, including detailed information about each academic plan and about academic organization ownership. This report references fields as defined on all pages of the Academic Plan Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Plan Owner	PRCSRUNCNTL
SR732 Academic Sub-Plan Report	Lists all defined academic subplans in Campus Solutions, including detailed information about each academic subplan. This report references fields as defined on the Academic Sub-Plan Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Sub-Plan	PRCSRUNCNTL

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
SR736 Campus Report	Lists, by academic institution, the campuses within an academic institution, including the effective date, description, and location. This report references fields as defined on the Campus Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Campus Table	PRCSRUNCNTL
SR736a Campus Location Report	Lists, by academic institution, the campuses within an academic institution, including the effective date, description, short description, and location code. This report references fields as defined on the Campus Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Campus Location Table	PRCSRUNCNTL
SR738 Career Pointer Exception Report	Lists, by academic institution, the career pointer exception rules, including the effective date, description, and short description. This report references fields as defined on the Career Pointer Exception Rule page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Career Pointer Exception	PRCSRUNCNTL
SR738a Career Pointer Exception Detail Report	Lists, by academic institution, the career pointer exception rules, including the effective date, description, and short description, and rule details about requested courses. This report references fields as defined on the Career Pointer Exception Rule page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Career Pointer Except Detail	PRCSRUNCNTL
SRSECVWU SA Security View Update report	Lists current component security setup data for the institution. Details such as component name, security level, and Add Search record settings are listed on the report. Use this report to get a complete snapshot of the security views data set up at the institution.	Set Up SACR, Security, Secure Student Administration, Process, Security Views Update	RUNCTL_SRSECVWU

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## Campus Solutions Application Fundamentals Reports: Selected Reports

This section provides detailed information on individual reports including important fields and tables accessed. The reports are listed alphabetically by report ID.

### SRSECVWU – Security Views

<b>COMPONENT</b>	Displays the name of the component name as entered on the Security Views page.
<b>GLOBAL</b>	Displays the status of the Global Security check box on the Security Views page. <i>Yes</i> indicates a status of selected, <i>No</i> indicates a status of cleared.
<b>MENUNAME</b>	When the Global Security option is set to <i>NO</i> , or cleared, this column displays the specific menu name, as entered on the Security Views page.
<b>BARNAME</b>	When the Global Security option is set to <i>NO</i> , or cleared, this column displays the specific bar name, as entered on the Security page.
<b>SECURITY LEVEL</b>	Displays the value entered in the Security field on the Security Views page. Options include: <i>None</i> , <i>Institution</i> , <i>Career</i> , <i>Program</i> , and <i>Plan</i> .
<b>SEARCH RECORD</b>	Displays the search record for the component. This value is not specified on the Security Views page. The search record is specified in PeopleSoft Application Designer on the Properties page for the component.
<b>ADD SRCH REC</b> (add search record)	Displays the Add searchrecord (if any) for the component. This value is not specified on the Security Views page. The Add searchrecord is specified in Application Designer on the Properties page for the component. A value of <i>N/A</i> indicates that the component has no add search record.



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