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Editing Existing OIS Organizations in Conjunction with the On-Line Application Process – *Revised: January 2013*

The following procedures should be used to change data for an existing NRS Organization in PeopleSoft used by the Office of International Studies. These changes are necessary to present an accurate representation of the approved and sponsored programs for the on-line application process. (The procedures demonstrated have been performed in the Test database and do not affect actual data.) The changes fall into these four main areas:

- 1. Changing Ownership/Proprietorship to the newly created PINT (Petitioned International NRS)
- 2. External Organization Name change
- 3. Adding or editing Location information
- 4. Adding or editing Affiliations page

Below are overall descriptions of each change followed by an illustration of how to perform the edit.

1. Changing Ownership/Proprietorship to PINT (Petitioned International NRS)

- a. As of September 2011, there has been an addition to the External Ownership Names associated with OIS NRS Programs. Previously there were two Ownership Names: Approved International NRS and Sponsored NRS Pgm.
- b. The organizations (and countries) with these codes are the only organizations that are to be displayed in the on-line Inquiry drop-down boxes and the on-line Application form drop-down boxes.
- c. In order to differentiate other organizations that are currently incorrectly designated as INTL (Approved International NRS), a new Ownership Name of PINT (Petitioned International NRS) was created. Once this new name is applied to existing organizations in PeopleSoft, the INTL organizations will no longer appear in the drop-down boxes.
- d. The information regarding the current codes to be associated with OIS External Organizations is as follows:

Field Name	Value	Eff Date	Status	Long Name	Short Name
PROPRIETORSHIP	INTL	1/1/1900	А	Approved International NRS	APRV-INTL
PROPRIETORSHIP	PINT	1/1/1900	А	Petitioned International NRS	PET-INTL
PROPRIETORSHIP	SPON	1/1/1900	А	Sponsored NRS Pgm	Spon NRS

e. There are two primary reasons why this change would be needed:

- i. If the organization was approved at one time and is no longer approved (this is changed by adding a new row), or
- ii. If the organization had never been approved (once a list of External Org IDs for these organizations has been compiled, it will be determined if they can be updated programmatically).

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- f. **QUERIES:** The following queries may be run to display the Ownership/Proprietorship of NRS organizations:
 - i. **WOIS_EXT_ORGS_NRS_ACTIVE_ALL** displays active NRS organizations with INTL, SPON or PINT Ownership codes.
 - ii. **WOIS_EXT_ORGS_APRV_INTL_SPONSR** displays only those active NRS organizations with an INTL or SPON Ownership code. Ultimately, only those organizations to be shown on the drop-down boxes will be displayed in this query.
- g. Test Database: These examples were created in the CS90Test Database.

1.e.i. Adding a <u>new</u> Ownership/Proprietorship row

for an organization that was approved at one time and is <u>no longer approved</u>

• Open the Organization Table page (Campus Community > Organization > Create/Maintain Organizations > Organization Table) for the desired organization

External Org ID:	500083		16 🖻 🖗		
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Description:	Hungary Program	n - Capital Univ]		
Long Description:	Hungary Program	n - Capital University	-		
Short Description:	Hungary Pr				
Organization Type:	NRS Q 🍄	Non-Resident Study	Program		
Proprietorship:	APRV-INTL -				
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1 Hungary Pr Univ	ogram - Capital		01/01/1	900 🔽	
Primary Location:	10			Locations	
Active Contacts		Personalize Find Vi	ew All I 🖾 I 📶	First 🚺 1 of 1 🕅 Last	
Contact Name	Тур	e Job Title	Effect	ve Date Primary	
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Organization Type Rel Non-Resident Study Pr	ated Information				

- Note that the Effective Date is 01/01/1900.
- Also note on the dark blue bar Organization Details that this is page "1 of 1"
- Click on the plus sign in the upper right
- A new page opens:

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Organization Type Rel	ated Information					
Non-Resident Study Pro	gram					

- The Effective Date now is today's date. You may leave the date as is or change it as appropriate to a date later than 01/01/1900.
- This is now page "1 of 2"
- Click on the Proprietorship drop-down and select from the list **PET-INTL**
- Click Save.
- Unless you made other changes to the page, it will now appear as follows:

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2. External Organization Name change

- a. In order to make the organization names more easily searchable in the drop-down boxes, there may need to be changes in the way the names appear in the PS External Organization table.
- b. Examples of organization name changes are:
 - i. A formal name change If the name of the organization is changing officially as of a given date (adding a new row plus using Correct History for the Location)
 - ii. A simple edit If the name of the organization is incorrect, but there has been no official change (Correct History)

2.b.i. Making an official name change as of a given date by <u>adding a new row</u> (and <u>Correct</u> <u>History</u> under Location Summary)

• Open the Organization Table page (Campus Community > Organization > Create/Maintain Organizations > Organization Table) for the desired organization

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rganization Details				Find I \	/Iew All Fir	
ffeetine Date:	01/01/1900	t Ctature:	Active			
Description:	OTS San Jose,	Costa Ric	a			
ong Description:	OTS San Jose,	Costa Ric	a - Duke Univ	ersity		N N
Short Description:	OTS San Jo					
Organization Type:	NRS Q 🗘	Non-Res	sident Study P	rogram		
Proprietorship:	APRV-INTL -					
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rimary Department:	Q				De	partments
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Organization Type Pe	lated Information					
Non-Resident Study P	rogram					

- Click on the yellow Correct History button in the lower right. It is now grayed out.
- Note that the Effective Date is 01/01/1900.
- Also note on the dark blue bar Organization Details that this is page "1 of 1"
- Click on the plus sign in the upper right
- A new page opens as follows:

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WESLEYAN UNIVERSET Favorites Main Menu > 0	Campus Community	/ → Organiz	ation > Create/I	Maintain Org	anizations	> Organizati	on Table
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Primary Department:	Q				Depar	tments	
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Save Return to Sea	rch Notify	()	Add 🖉 Update/D	isplay 🔏 1	nclude Hilstor	y 🕼 Correc	t History

- The Effective Date on this page is today's date. You may leave this as is or change it as appropriate to a date later than 01/01/1900. (After the new name has been entered, when this organization is referenced, it will be with the new name as of the new Effective Date.)
- This is now page "1 of 2." (Page 2 of 2 is the old name.
- Make the changes for the official name in the three description boxes. Click Save.

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act Undate Date/Time:	11/29/20	12 2-22-570	M by: CPIKE01			

- <u>Changing the Name Under Active Locations</u> You'll note that the name of the organization has not changed in the Active Locations section. Unless the name for the primary location is meant to stay the same, this information needs to be edited on the Locations page which is a separate table.
 - o Click the yellow Correct History button at the bottom of the page. The text will gray out.
 - Click on the yellow Locations button.

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o Click on the Locations Details link

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- Note the original names are still on the Location Summary page under the Location History Section.
- Change the Description and Short Desc to correspond with the same fields on the Organization Table page.
- NOTE: There must be a Country code filled in under Location History. If there is not, when you click OK, you will receive the Message: Warning -- At least one address is required when adding a new organization. (14200,14)
 - Simply click **OK.** This is because only the Country is required. If the Country is on the page, you are not required to enter the full address or contact information. Those are optional.
- o Click OK and when the Organization Table page opens, click Save.
- The new description is now saved in both the Organization and Location tables.

2.b.ii Correcting an inaccurate name through Correct History

 Open the Organization Table page (Campus Community > Organization > Create/Maintain Organizations > Organization Table) for the desired organization

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rganization Details			Find View All	First 🚺 1 of 1 🚺 Last
Effective Date:	01/01/1990 🛐 ,	Status: Active	-	+ -
Description:	Universidad Auto	onoma de Yucata		
ong Description:	Universidad Auto	onoma de Yucatan		
Short Description:	Universida			
Organization Type:	NRS Q P	Non-Resident Study F	rogram	
Proprietorship:	APRV-INTL -			
Active Locations		Personalize Find View	v All 🖉 📶 🛛 Firs	
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rimary Location:	10			Locations
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- Click on the Correct History button in the lower right
- The appearance of the button changes so that the icon is grayed out -
- Make whatever changes are needed to the organization name by typing in the three Description fields

Office: Office of International Studies

ternal Org ID: 7394	435	23		
ganization Details		FI	nd View All First	1 of 1 🔯 Last
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Organization Type Related <u>Non-Resident Study Program</u> ast Update Date/Time:	11/29/2012 3·21·21P	M by CPIKE01		

- Click Save.
- <u>Changing the Name Under Active Locations</u> You'll note that the name of the organization has not changed in the Active Locations section. Unless the name for the primary location is meant to stay the same, this information needs to be edited on the Locations page which is a separate table.
 - o The Correct History button will still be grayed out.
 - Click on the yellow Locations button.

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Yucata 01/01/1990 Active Location Details	Universidad Au Yucata	itonoma de		01/01/1990	Active	Location Details	•

- Click on the Location Details link.
- Change the Description and Short Desc to correspond with the same fields on the Organization Table page.

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- Click Save. The following message may appear: *Warning -- At least one address is required when adding a new organization. (14200,14).* Simply click **OK.** This is because only the Country is required. If the Country is on the page, you are not required to enter the full address or contact information. Those are optional.
- Click OK and when the Organization Table page opens, click Save.

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• The new description is now saved in both the Organization and Location tables.

3. Addition or editing of Location information

- a. There are currently a number of Organizations that either do not have countries associated with them or the country needs to be revised (e.g. from USA). These occur in the Organization Locations table.
- b. These edits include:
 - i. Adding a country where none exists in the Organization Locations page
 - ii. Changing a country code on both pages.

3.b.i Adding a country where none exists in the Organization Locations Table

• Start by making a note of the Description and Short Desc to be entered onto the Locations page (NOTE: this information <u>may</u> be missing from the Location page). Open the Organization Table page (*Campus Community* > *Organization* > *Create/Maintain Organizations* > *Organization Table*) for the desired organization.

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Organization Type Rela Non-Resident Study Pro	ited Information gram					
	07/12/2012	4-24-57AM				

• After having noted the descriptions, open the Location Summary page by clicking on the yellow Locations button.

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ID: 0500520 ary Location:	Florence Campus - Fairfield Un	M 🖬 🗭		
ation		Personalize Find View All 🕼 🏙 F	Irst 🚺 1 of 1 🚺 Last	
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- Click on the <u>Locations Details</u> link.
- Change the Effective Date to be the same as the Effective Date on the Organization Table page. In this case, it should be changed to 01/01/1990.
- Enter the Description and the Short Desc
- From the Country drop-down box, select the appropriate country

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Short Desc:	Florence C					
Country:	ITA Q Italy					
Address		-				
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- Click OK.
 - The following message may appear: Warning -- At least one address is required when adding a new organization. (14200,14). Simply click OK. This is because only the Country is required. If the Country is on the page, you are not required to enter the full address or contact information. Those are optional.
- You are returned to the Organization Table page. Click Save.

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4. Adding or editing Affiliations page

- a. The Affiliations page contains required information for NRS organizations as well the new elective Fullyear designation (Group Type = OIT and Group Code = FYM or FYO).
- b. **QUERY:** This query displays all the Affiliations Details fields, required as well as elective: **WOIS_EXT_ORG_AFFILIATIONS**
- c. The details regarding these codes are shown here:

Group Type	Group Cd	Eff Date	Status	Descr	Short Desc
OIT	FYO	1/1/1900	А	Full-year optional	FY Option
ΟΙΤ	FYM	1/1/1900	A	Full-year mandatory	FY Mandtry

- i. There are some active organizations that do not have any of the required information (i.e. Affiliation Details). These should be reviewed and updated as needed
- ii. Any organizations that should have the Group Code/Group Type designating Full-year needs to be updated.

4.b.i. Adding required Affiliation Details information

- Open the Organization Affiliation page : (Campus Community > Organization > Create/Maintain Organizations > Organization Affiliation) for the desired organization
- Complete the fields on this page as follows (some may already be populated):
 - o Academic Institution: Wesleyan University
 - **GPA Type:** 100P
 - Grading Scheme: UGD
 - Grading Basis: TRN
 - Level of Detail: Detail
 - **Details to Print:** External Courses (*This means that the course number and title that will print on the transcript is the external course title, not the internal equivalent course.*)
 - Check Include Transfer Credit in GPA: This box must be checked.

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Group Type	*Group Code					

• Save the page.

4.b.ii Adding <u>elective</u> Affiliation page information (full year under Organization Groups)

• Open the Organization Affiliation page : (Campus Community > Organization > Create/Maintain Organizations > Organization Affiliation) for the desired organization

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Croup Type	*Group Code
OIS-Time	Full-year mandatory

- Under Organization Groups, Group Type, select OIS-Time.
- Under Organization Groups, Group Code, select the appropriate code; in this example it is Full-year mandatory
- Click Save.