EXTERNAL ORGANIZATIONS – Educational Institutions
DUPLICATE RECORD PROCEDURES
Marking Duplicate Records so they won't be used

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

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

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

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

v.   Ensure that the **Status** is **Active**.

vi. Confirm the accuracy of the three **Description** fields

vii. Verify that the **Organization Type** is **COLL** or **SCHL** only. *(Exception: NRS)*

viii. Check that the **Proprietorship** is correct for the **Organization Type**. If unsure, select **Public**.

ix. **Save** the page. If when you click **Save** you receive a popup message beginning "Cannot change current or history records unless in Correction mode…" click on the **Correct History** button, and then click **Save** again.

ACCURATE RECORD – COMPLETED ORGANIZATION TABLE PAGE

b. **Open the** <mark>School Data</mark> **page for the accurate record:**

    i. From the **Organization Table** page for the accurate record, click on the link under **Organization Type Related Information**. You are taken to the **School Data** page. Verify and update if needed the information on the **School Data** page ii.   *If you need to make any changes, be sure the **Correct History** button is grayed out on the **Organization Table** page.* Otherwise, you will not be able to save the changes.

    iii.   The **Effective Date** should be the same as or less than that on the **Organization Table** page

iv. The **Status** should be **Active**

    v.   The box **Offers Courses** should be checked

    vi.   Under **School Characteristics** the **School Type** should be populated with either **College** or **Secondary**, as appropriate.

    vii.   Ensure that there is an **ATP Code** under **School Codes**. If there is not, do a search for the **ATP Code** in the sources available. These are some of the web sites you can search for the appropriate **ATP Code**:

High School and College ATP Code Search:
http://sat.collegeboard.org/SAT/public/pdf/sat-code-list-us.pdf

High School ATP Code Search:
http://apps.collegeboard.com/cbsearch_code/codeSearchHighschool.jsp

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

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

Colleges/Universities ATP Code Search:
http://apps.collegeboard.com/cbsearch_code/codeSearchCollege.jsp

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

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

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

School Data

Org ID: 129380   California Institute of Arts

Primary Location: 1   California Institute of Arts

Organization Details   Find | View All   First ◄ 1 of 1 ► Last

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

☑ Offers Courses

School Characteristics	School Codes	System Default Values
☐ Accredited	ATP: 004049	Career: Undergrad
☐ Transcript Translation	FICE:	Term Type: Semester
School Type	ACT:	Unit Type: Semester
College	IPEDS:	
	NCES:	

Catalog Information

School District:

☐ Shared Catalog

Catalog Org:

School Code:

OK   Cancel   Apply

ACCURATE RECORD – COMPLETED SCHOOL DATA PAGE

x.   Click **OK**.

xi.   You are returned to the **Organization Table** page

c. Navigate to the **Location Detail** page for the accurate record:

   i.   From the **Organization Table** page for the Accurate Record, click on the yellow **Locations** button under **Active Locations**.

   ii.   The **Location Summary** page opens. *If you need to make any changes, be sure the **Correct History** button is grayed out on the **Organization Table** page. Otherwise, you will not be able to save the changes.*

Location Summary   Location Detail

Org ID: 129381   Claremont Mckenna

Primary Location: 1   Claremont Mckenna

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

Add

OK   Cancel   Apply

Location Summary | Location Detail

i. Open the Locations Detail page ii. Click on the **Location Detail** tab or on the **Location Details** link iii.   The **Effective Date** should be the same as or less than that on the **Organization Table** page
iv. The **Status** should be **Active**
v.   The **Description** and **Short Desc** should be populated
vi.   The **Country** should be populated

ACCURATE RECORD – COMPLETED LOCATION DETAIL PAGE

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

ACCURATE RECORD – COMPLETED EDIT ADDRESS PAGE

PROCEDURE TO UPDATE THE DUPLICATE RECORD:

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

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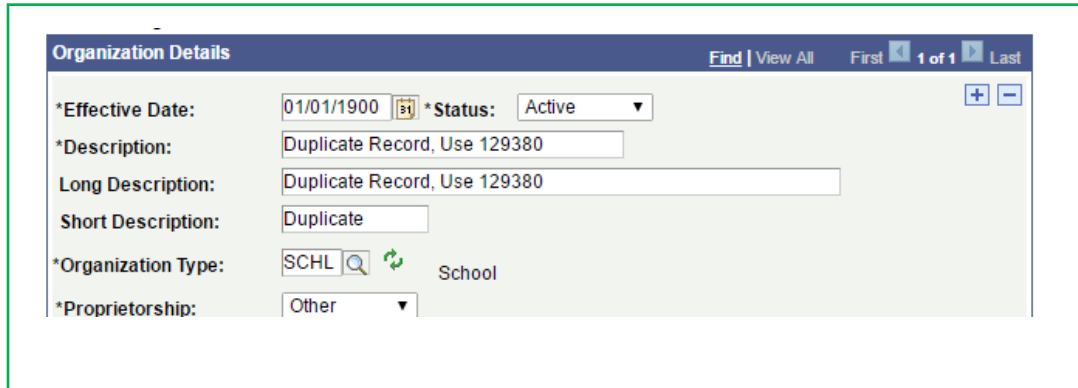

Duplicate Record – Organizational Table Before Edits

> > *iii. Click on the **Correct History** button. It should be grayed out.*
> > *iv. Change the names in the three description boxes:*

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

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

c. *Open the **Locations** pages*

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


Location Summary | **Location Detail**

Org ID: 363894   California Institute of Arts
Primary Location: 1   Duplicate Record, Use 129380

Location				Find First ◀ 1 of 1 ▶ Last

Location: 1

Location History   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date: 01/01/1900 📅   **Status:**   Active ▼   ➕ ➖
*Description: Duplicate Record, Use 129380
Short Desc: Duplicate
Country: USA 🔍 United States
Address: Edit Address

Edit Address

Country: United States   Change Country
Address 1:   _____
Address 2:   _____
Address 3:   _____
City: _____   **State:** _____ 🔍   **Postal:** _____
County: _____
[OK]   [Cancel]

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i. *On the* **Organization Table** *page, under **Active Locations***
1. *Remove the number from the Primary Location box; the box should now be empty*
2. *The Primary Location dropdown should be empty*
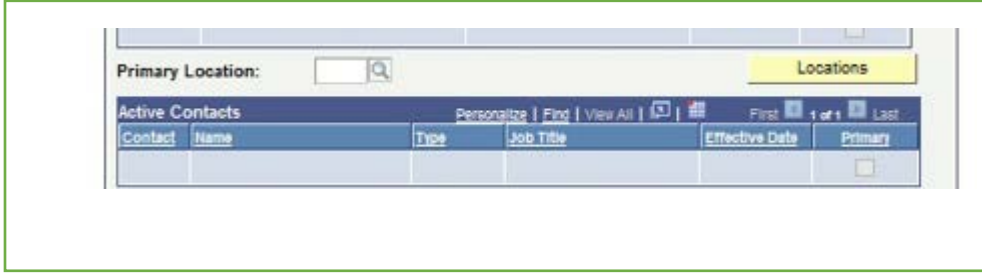
d. *When completed, if you do a search for the above OrgID, you will only find the* ***Organization Table*** *page. If you click on the* ***Locations*** *button or the link under* ***Organization Type Related Information*** *and try to search, you will receive a message of "No matching values were found"*

End of Process