Campus Community Setup Guide

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DRAFT

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Table of Contents

Section 1 Campus Community Description

PeopleSoft Campus Community serves as the hub of the PeopleSoft Student Administration system, providing many features basic to all of the applications in the Student Administration suite.

PeopleSoft Campus Community enables you to maintain and manage a wide range of biographic and demographic information on people and organizations of interest to your institution, both internal and external. With Campus Community's comment and communication features, you can manage all of your institution's contacts with students, prospects, recruits, staff, vendors, and so on. The checklists function enables you to track activities for prospects, students, and staff. Event and committee management features streamline and simplify the organization of committees and events across your campus.

There are many tables within Campus Community that are shared with Human Resources. The Student Team and HR Team must work closely together to determine values that will work for both areas.

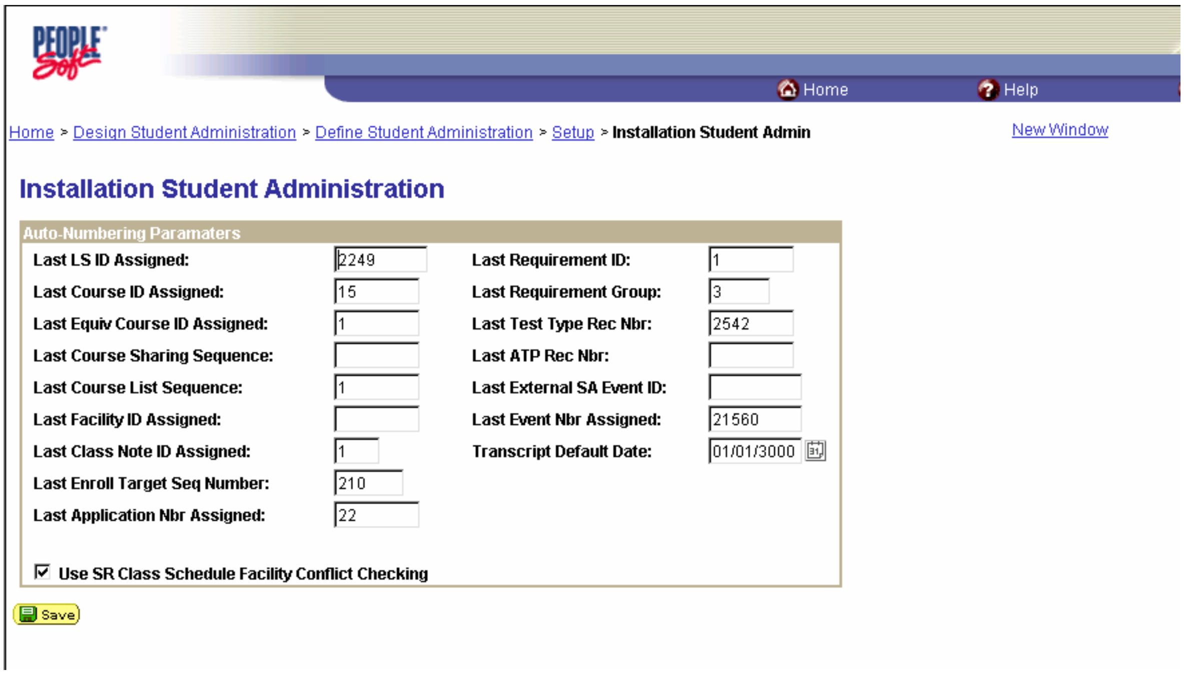
Section 2 Installation Panels for Campus Community

2.1 Student Administration Installation Panel

Use the Installation Student Administration page to set or review start numbers for automatically incremented fields within your Student Administration system. Each of the fields on this page is a field that is automatically incremented throughout the system, such as Course ID, EmplID, and so on.

Page Name: Installation Student Admin

Navigation: **Home→ Design Student Administration→Define Student Administration → Setup→ Installation Student Admin**



2.1.1 Considerations

A Campus Community Baseline modification (Number CC99006) has been delivered with your system. This modification extends the Empl ID field from the delivered 7-digit field to a 9-digit Empl ID. The modification also increments the Empl ID by 13 rather than the delivered value of one.

Portions of this page may be completed in later prototyping sessions.

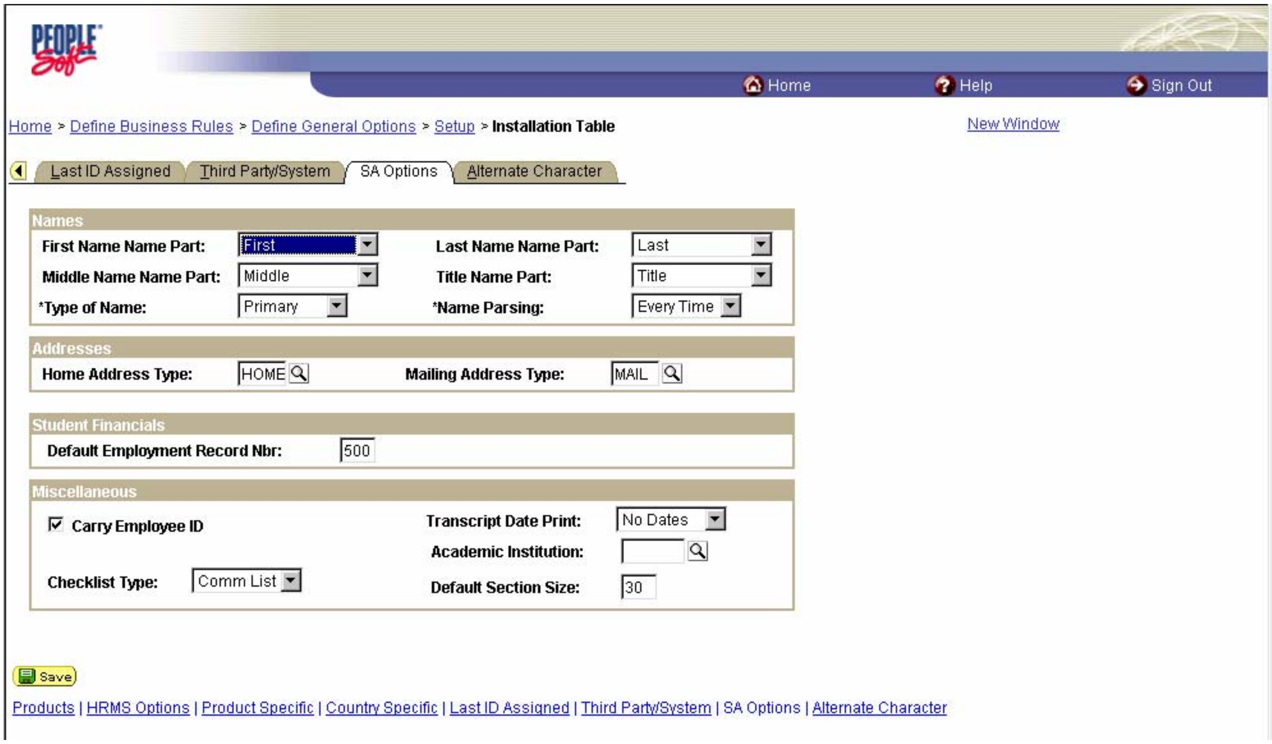
2.1.2 Recommendations

2.2 Student Administration Defaults

Your institution must make some general design decisions before you can set up most of the Student Administration applications. You will probably want to review the default settings for these to be sure they reflect your institution's decisions and to understand why the system auto displays—or otherwise handles— items throughout your system.

Page Name: SA Options

Navigation: **Home→ Define Business Rules → Define General Options → Setup → Installation Table→ SA Options**



2.2.1 Considerations

When both PeopleSoft HRMS and PeopleSoft Student Administration applications are installed, the Student Administration functions take precedence over HRMS. That is, where the two applications have similar features or the same tables, your system will point to the Student Administration features or tables first.

Home Address Type, Mailing Address Type, and Type of Name are the types used to synchronize data between PERSONAL_DATA and these "type based" records (NAMES, ADDRESSES). These are frequently referred to as the "magic types."

Default Employment Record Nbr (default employment record number) field is used when the PeopleSoft Student Financials Refunding feature uses PeopleSoft Payroll to cut refund checks. In order to use payroll to refund money to a student, the student must have JOB and TAX records populated in the payroll system.

The Academic Institution is used to default an institution throughout your system.   You will need to leave this blank if you have more than one campus in your database.

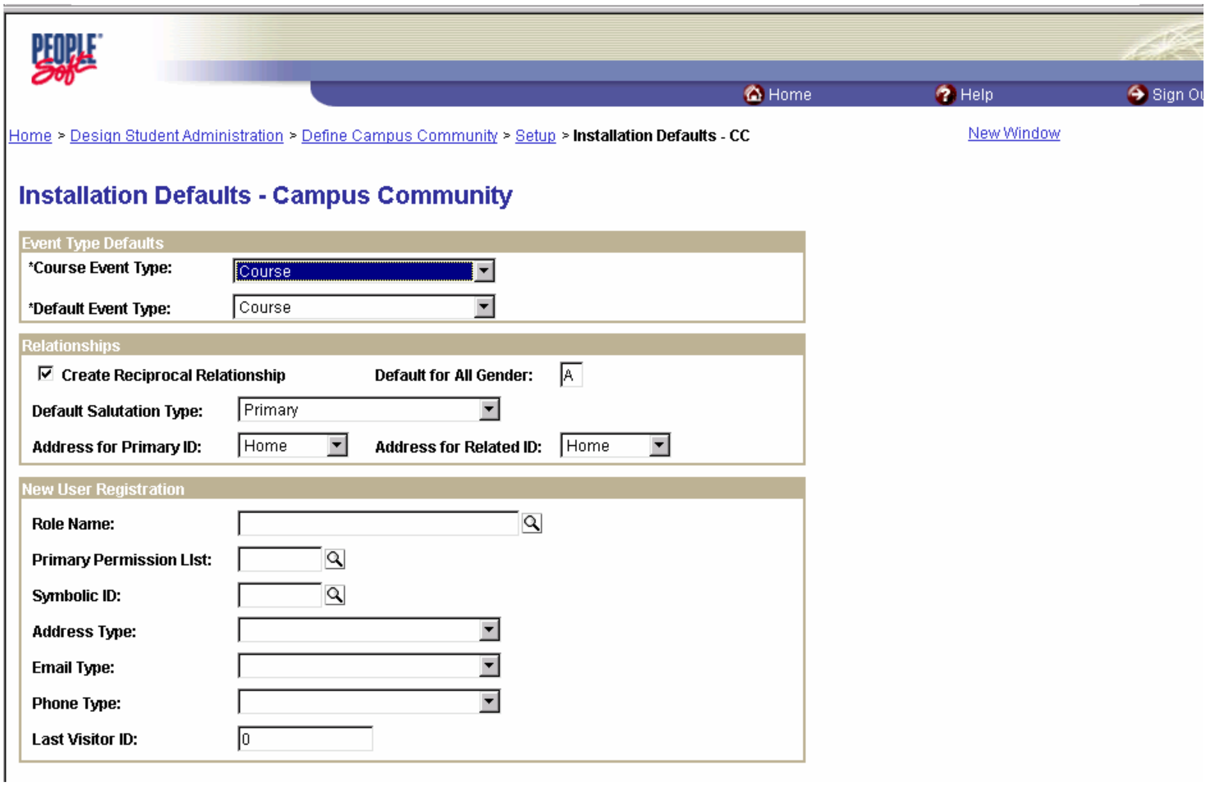
2.2.2 Recommendations

2.3 Campus Community Installation Defaults

After you have created event types on the Event Type Table, you can specify the event types you want to use as defaults in your system.

Page Name: Installation Default-CC

Navigation: <u>Design Student Administration → Define Campus Community → Setup → Installation Default-CC</u>



2.3.1 Considerations

The **Course Event Type** shipped with your system is CRSE. Do not change this. Student Records treats courses as events. Therefore, the Course Event Type must be set to CRSE so that you will be able to schedule classes.

The **Default Event Type** shipped with your system is also CRSE. You can override this if your institution wants to set a different default for the type of event in the Events component.

Do ***not*** change the delivered **Default for All Gender** value of ***A (All)***. Changing it can change genders that you never intended to change throughout your entire system.

2.3.2 Recommendations

Set Campus Community Installation defaults to CRSE.

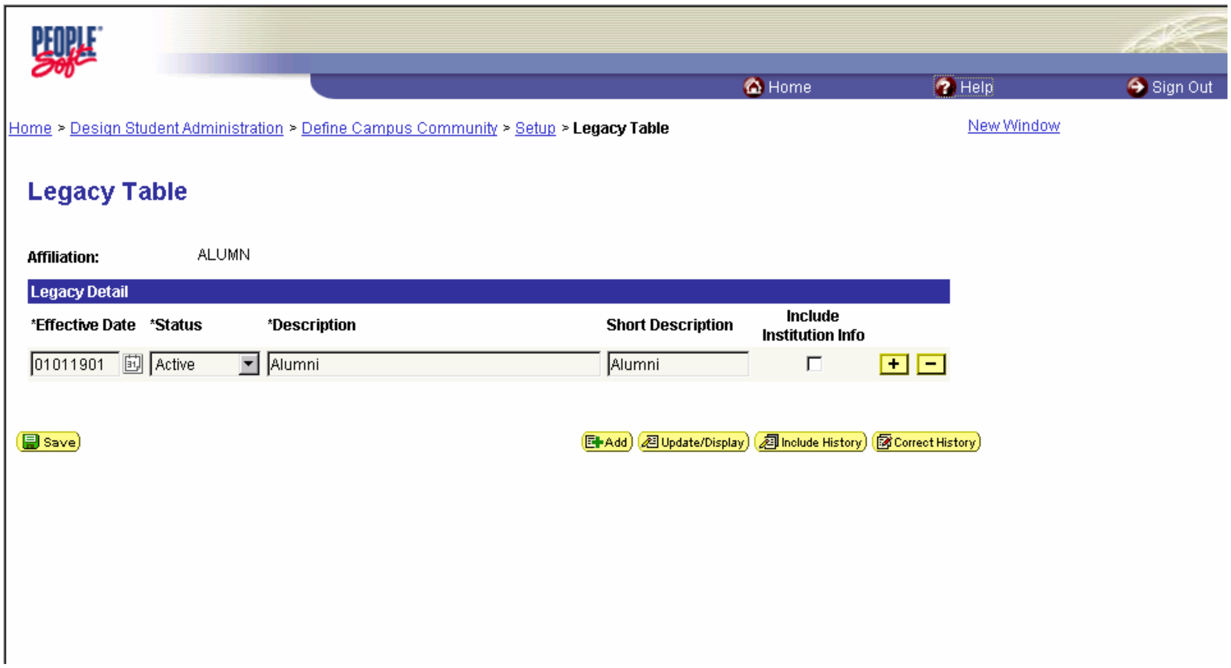
Section 3 Campus Community Tables

3.1 Legacy Table

Use the Legacy Table to set up legacy relationship types. You can identify the types of donating affiliations an individual or organization might have with your institution. For example, an organization that makes a donation might be a sponsor, and an individual who donates might be an alumnus. You can define as many legacy relationship types as your institution requires.

Page Name: Legacy Table

Navigation: Home→ Design Student Administration → Define Campus Community → Setup → Legacy Table



3.1.1 Considerations

The Include in Institution Info indicates that the academic information relevant to the specified legacy relationship is to be included when this affiliation is selected for the related individual on the Legacy Information page in the Relationship component.

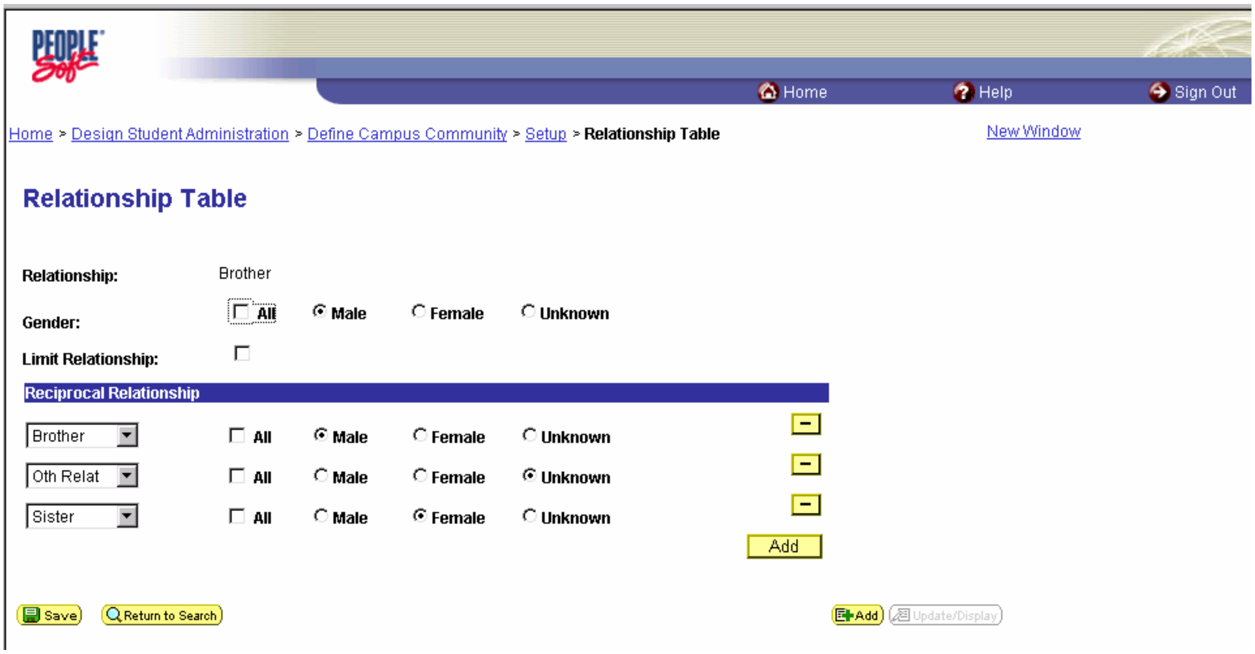
3.1.2 Recommendations

3.2 Relationship Table

Use the Relationship Table to define reciprocal relationships. You can identify reciprocal relationships between individuals in your system. You can then use the reciprocal relationship to link addresses between individuals on the Addresses panel. You can also use reciprocal relationships to indicate which communications should be sent to the Communication Recipients identified on the Relationships panel.

Page Name: Relationship Table

Navigation: Home→ Design Student Administration → Define Campus Community → Setup → Relationship Table



3.2.1 Considerations

The Relationship you're defining is displayed at the top of the panel. You can review or enter the Gender associated with this relationship. Select the **Limited Relationship** check box to indicate that only one of these relationships should exist for each individual in the system at a time.

The default Reciprocal Relations for the relationship you're defining are available from the drop-down list. When you select a Reciprocal Relation, the associated Genders display for you to review or change as necessary. Each relationship can have up to three Reciprocal Relations. Reciprocal Relation values are shipped with your system as translate values. *These translate values can be modified if necessary.*

For example, let's say you're defining the Relationship of Spouse. Since a spouse can be either male or female, make sure the Gender box for All is selected. Since the reciprocal relation of spouse is also the non-gender specific relation of spouse, the Reciprocal Relation of Spouse and the Gender box for All should be selected.

Another example is the relationship of Daughter. When you select the relationship type of daughter, the Gender box for Female is selected. The reciprocal relation of Mother and the Gender box for Female are selected. The reciprocal relation of Father with the Gender box for Male is selected. Because a relationship can have up to three reciprocal relationships in the system, the system displays a third reciprocal relation of None Indicated with the Gender box for Unknown selected.

3.2.2 Recommendations

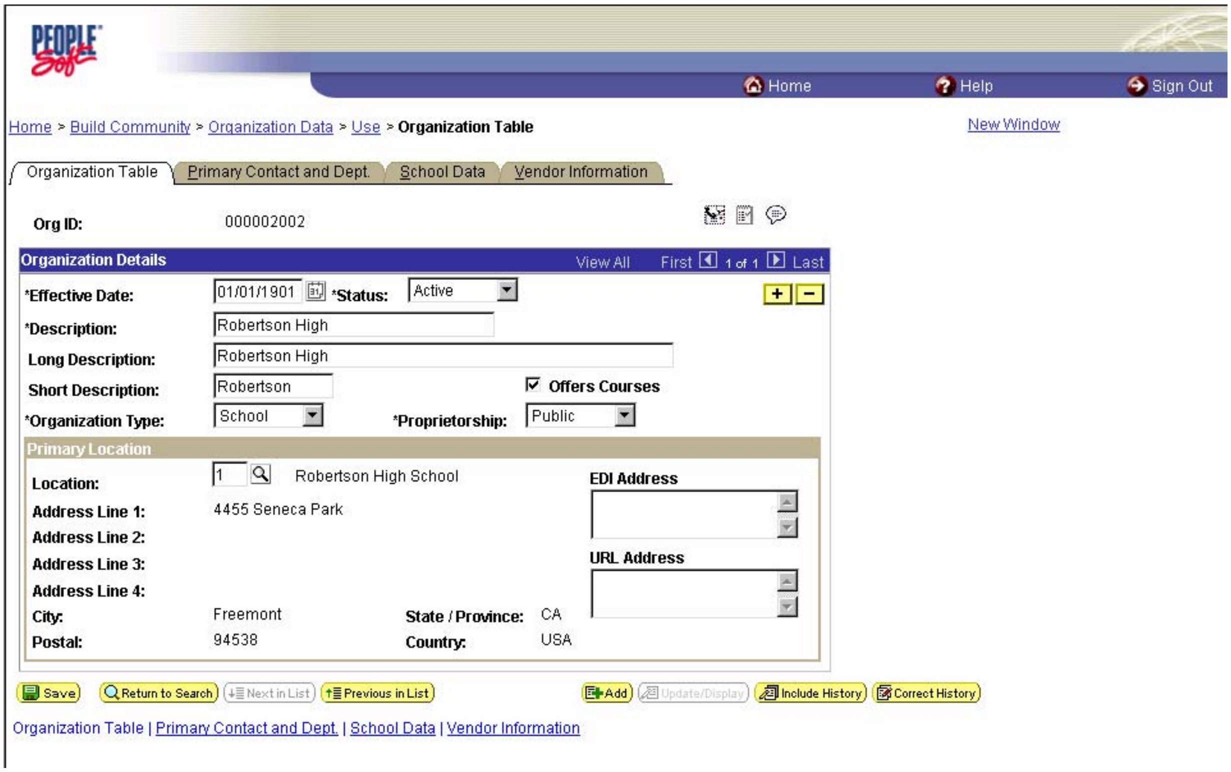
The Relationship Table can be set-up to your institutional specific needs.

3.3 Organization Table

The Organization Table is used in many places in the Student Administration System. This table is the repository for all external organizations that your school has a relationship. These organizations could be schools you accept transcripts from, organizations who provide scholarships to your students, and companies that you need to bill for classes.

Page Name: Organization Table

Navigation: **Home→ Build Community → Maintain Organization Data → Use → Organization Table → Organization Table**



3.3.1 Considerations

You must add an organization to your system before you can specify primary contacts, locations, and departments.

For those organizations that offer courses, before you can specify school subjects, terms, and courses, these items must be set up and already exist in your system, ready for you to use when you add the organization.

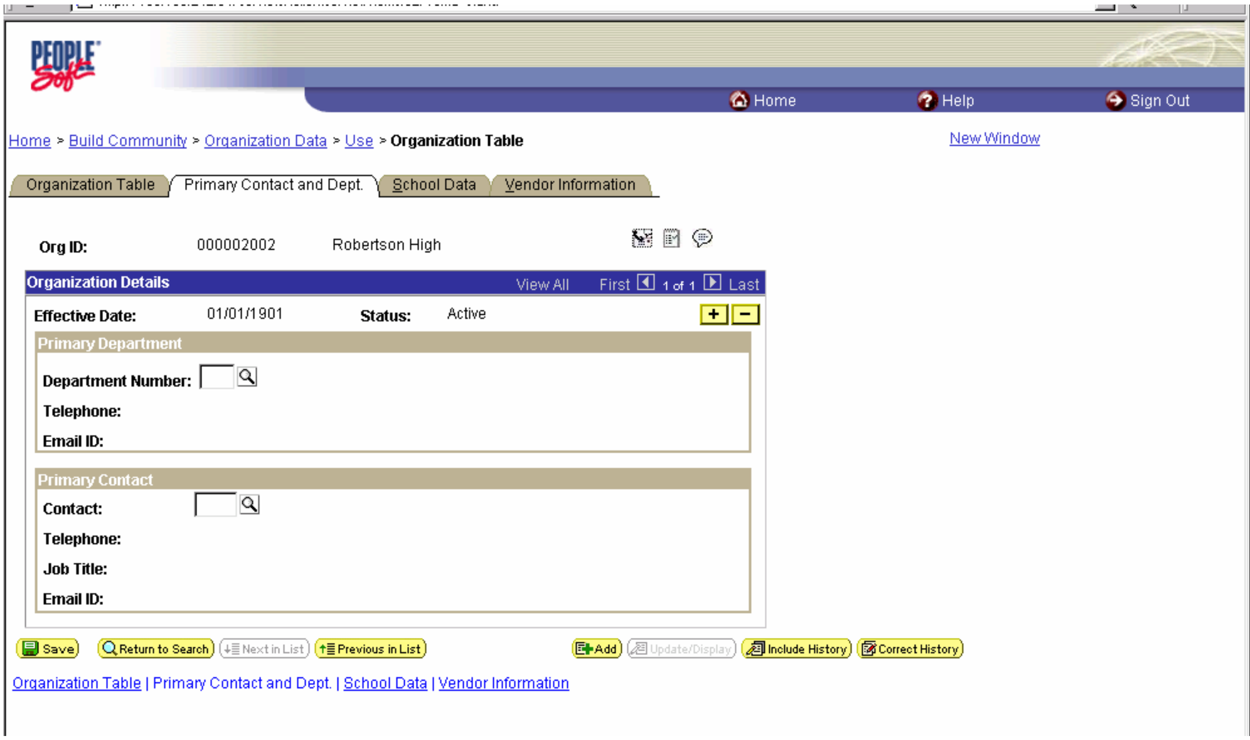
You can enter an ID for the new organization that you are adding, however, if you do so, you run the risk of disrupting the auto-numbering sequence that is included with the system. You will also disrupt the auto-numbering sequence if you manually type in the word "NEW" for the ID. If you manually typed "NEW" or any other value, you can delete the value and tab out to remove it.

SOSS has already provided school information in this table. The External Organization Table is loaded from the Institution of Origin table, numbered from C00000001 to CXXXXXXXX. These values will be updated by SOSS periodically from the COSAR table. Any modifications that are made to these pre-delivered values will be written over when the values are updated.

3.3.2 Recommendations

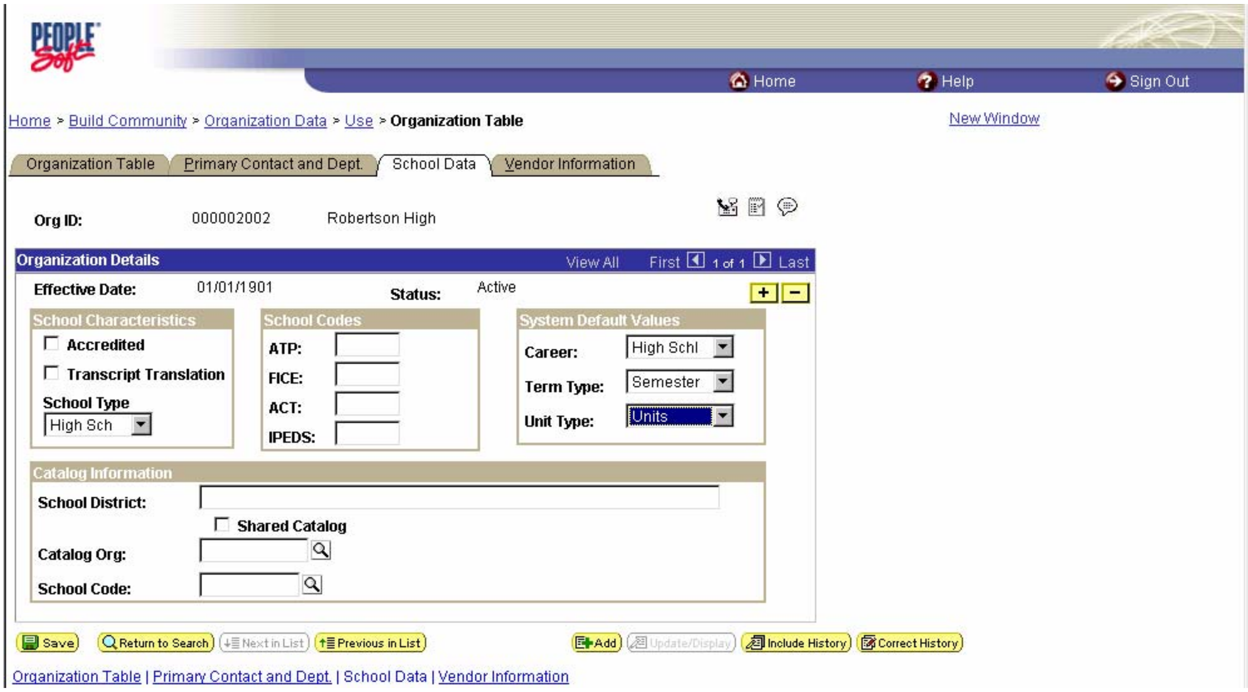
Page Name: Prim Contact and Dept

Navigation: <u>**Home→ Build Community → Maintain Organization Data → Use → Organization Table → Prim Contact and Dept**</u>



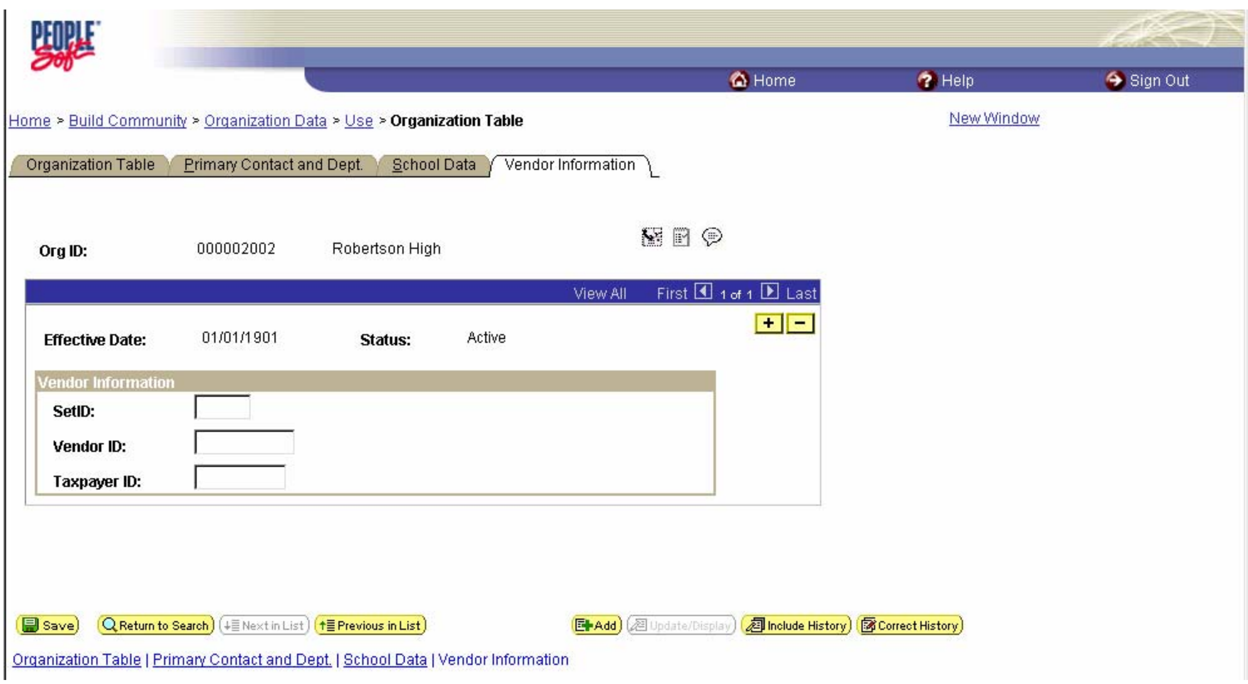
Page Name: School Data

Navigation: **Home→ Build Community → Maintain Organization Data → Use → Organization Table → School Data**



Page Name: Vendor Information

Navigation: **Home→ Build Community → Maintain Organization Data → Use → Organization Table → Vendor Information**



3.4 External Organization Code Types

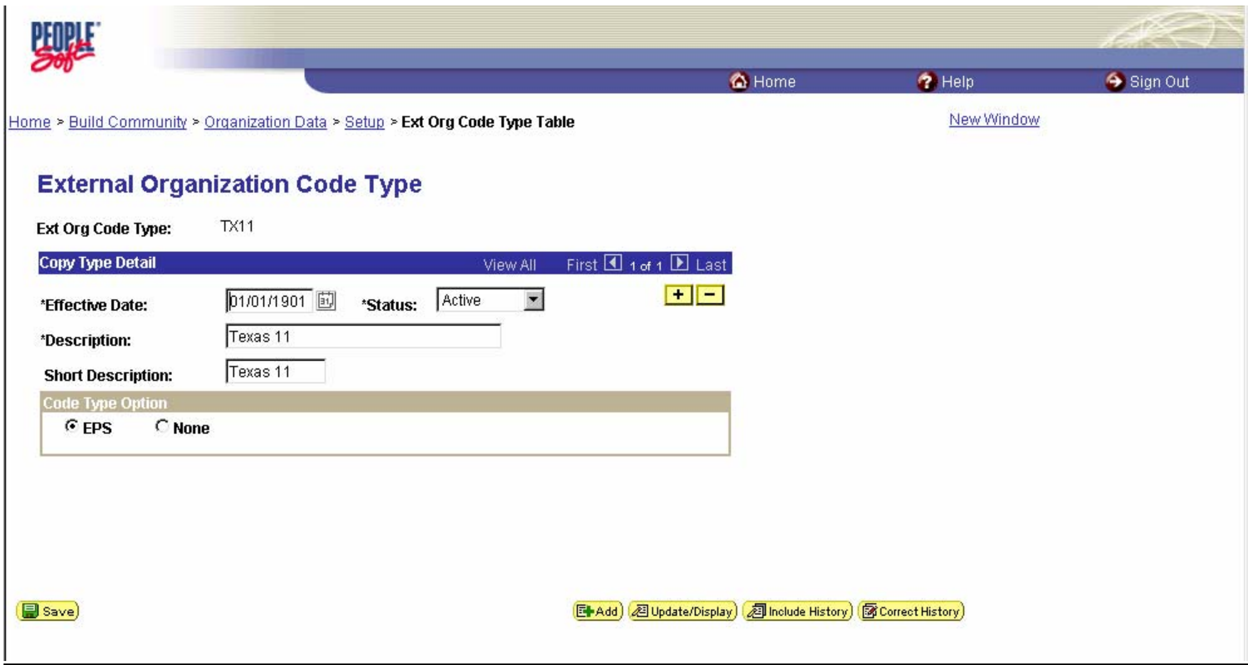
EPS™ (Enrollment Planning Service) is a geo/demographic data service offered annually by the College Board to colleges and universities. EPS provides information to subscribing institutions about competitors, feeder schools, and demographic strengths and weaknesses. EPS Market Codes are used to categorize external organizations and people into geographical areas, mostly in the United States.

Some Admissions offices use EPS market codes to focus their recruiting efforts in geographic areas in which they believe they will be the most successful.

Note that there is a license agreement that will need to be signed with the College Board in order to be able to use the EPS geomarket data, but *an institution is not required to purchase EPS in order to use the EPS market code functionality.*

Page Name: Ext Org Code Type Table

Navigation: **Home→ Build Community → Organization Data → Setup → Ext Org Code Type Table**



3.4.1 Considerations

PeopleSoft Student Administration does not provide EPS data; however, it does provide an EPS market code load process and lets you automatically assign the market codes to external organizations, for example, schools.

Use the **Code Type Option** field to specify whether the External Organization Code Type you are adding is an EPS market code type. If it is, select EPS. If the code you are adding is not an EPS market code, select None.

3.4.2 Recommendations

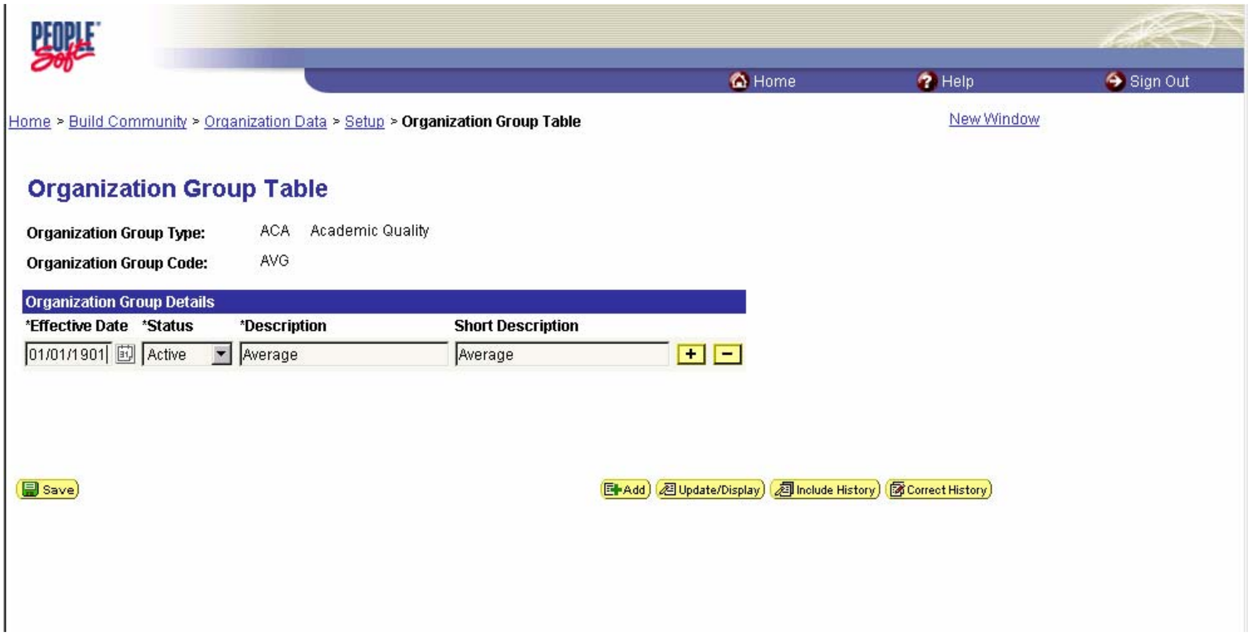
Setup the External Organization Code Type if one uses EPS.**Organization Group Table**

Organization Group Types and Group Codes enable you to group similar organizations together by a high level type and further define them into specific categories within. For example, in Admissions, you might want to group organizations according to their academic quality. You would set up a high level Group

Type of Academic Quality. Within that group type, you could then further identify each organization in the group by assigning Group Codes of Below Average, Average, and Highly Competitive.

Page Name: Organization Group Table

Navigation: **Home→ Build Community → Organization Data → Setup → Organization Group Table**



3.4.3 Considerations

Predefined Organization Group Types with associated Group Codes are shipped with your system as translate values.

Additional types and codes can be added to fit specific business processes.

3.4.4 Recommendations

The Organization Group Table should be setup according to campus specific business requirements.

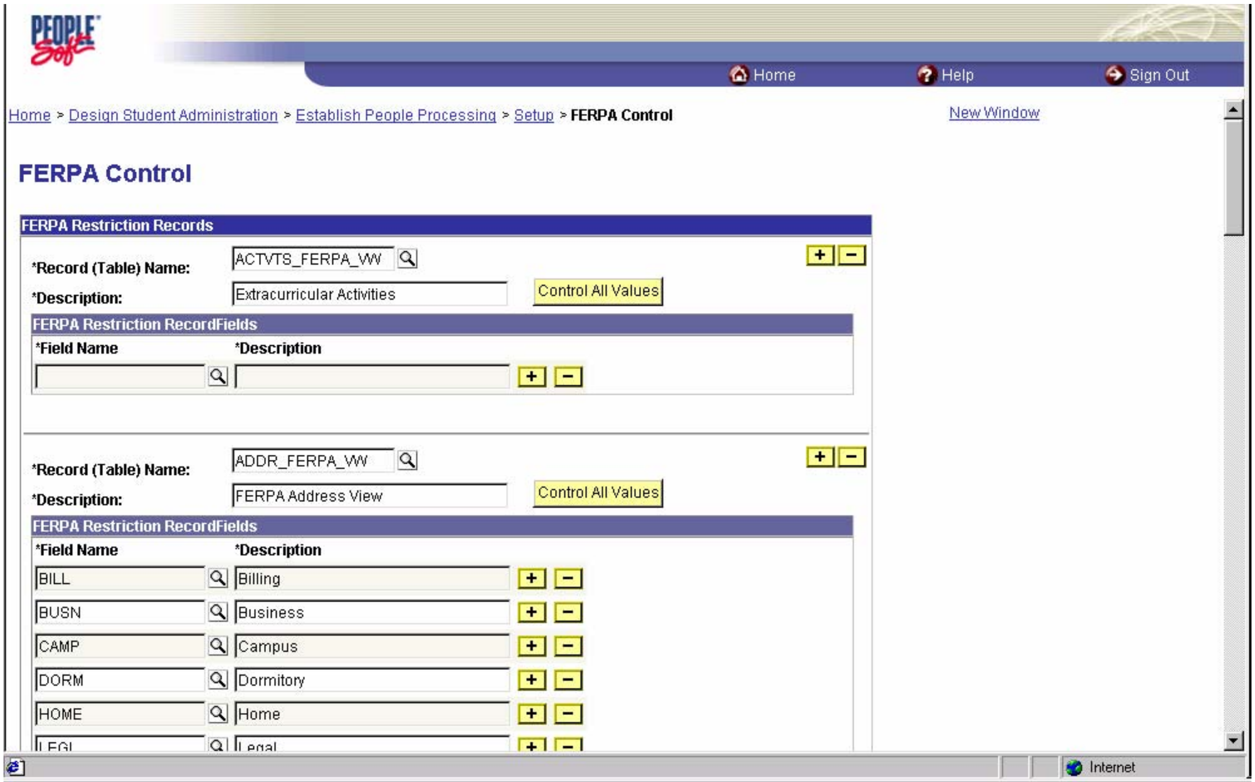
3.5 FERPA Control

Under FERPA (Family Educational Rights and Privacy Act), institutions can release directory information about an individual provided the individual has been given reasonable opportunity to prohibit, in writing, the disclosure of such information.

PeopleSoft's FERPA feature is designed to deal with Extracurricular Activities, addresses, email addresses, names, personal data, phones and photographs. Other information about students in your Student Administration system may be subject to FEPRA regulation and should be treated as confidential according to your institution's policy.

Page Name: **FERPA Control**

Navigation: **Home→ Design Student Administration → Establish People Processing → Setup → FERPA Control**



3.5.1 Considerations

It is important to note that PeopleSoft Student Administration handles FERPA in the reverse of what you might think. Under FERPA, your institution can release directory information about an individual unless that individual restricts some or all of the information. It would seem you should apply control only to those items specifically prohibited by that individual. However, in PeopleSoft, when the FERPA button is applied, all of an individual's directory information becomes restricted. You must then release the non-restricted information from FERPA restriction in the FERPA_VW records. By automatically restricting all directory information, PeopleSoft helps protect operators at your institution from inadvertently releasing prohibited information.

The FERPA_VW records available are defined on the CC_FERPA_SEL_VW record. You can modify the view records.

The descriptions appear on the FERPA self-service page in PeopleSoft Personal Portfolio Collaborative Application. If you implement FERPA self-service, you might want to modify these descriptions.

3.5.2 Recommendations

Review business practices of all areas on campus that release directory information and determine a FERPA setup that best meet the needs of the campus.

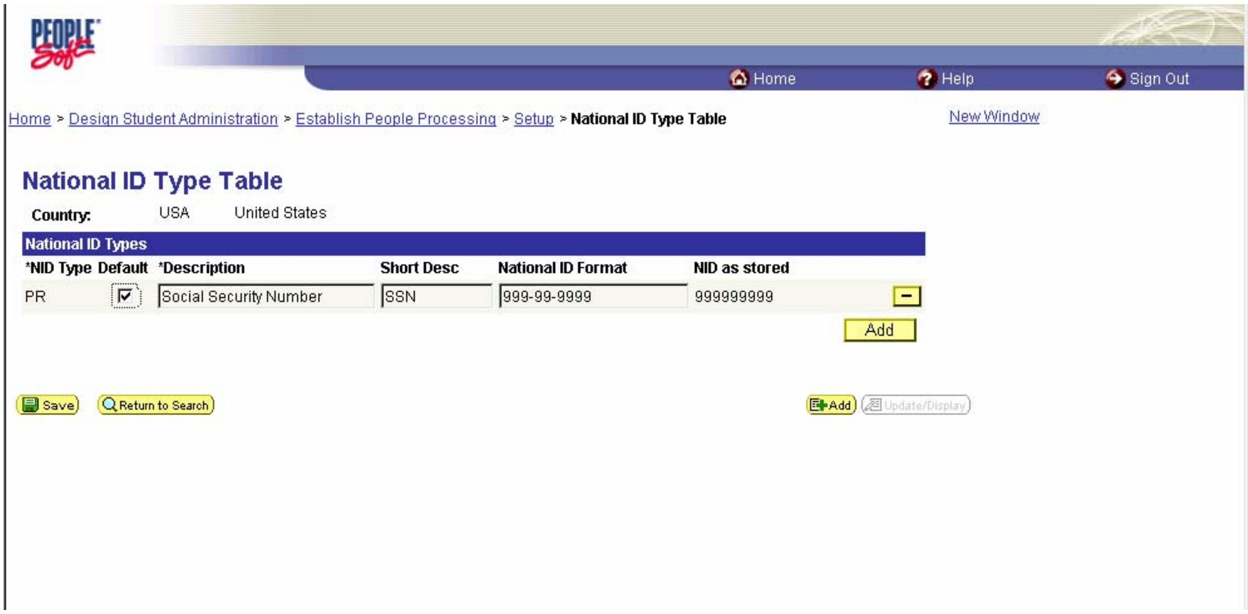
3.6 National ID Type Table

Different countries track some form of identifier for payroll, identification, or benefits purposes. For example, German workers are assigned a Social Insurance Number, UK workers have a National

Insurance Code, and US individuals have a Social Security Number. Your system allows you to record as many country-specific identifiers—whether they are actually used as national identification or for other purposes—as an individual may have. National IDs are defined and formatted per country on your system's National ID Type Table. National IDs for many countries are shipped predefined with your system. For example, the 9-digit Social Security Number most often used in the USA is shipped predefined. You can define additional National IDs if required.

Page Name: National ID Type Table

Navigation: **Home→ Design Student Administration → Establish People Processing → Setup → National ID Type Table**



3.6.1 Considerations

If you have already implemented PeopleSoft HRMS at your institution, the National IDs required by your institution will most likely already be set up.

3.6.2 Recommendations

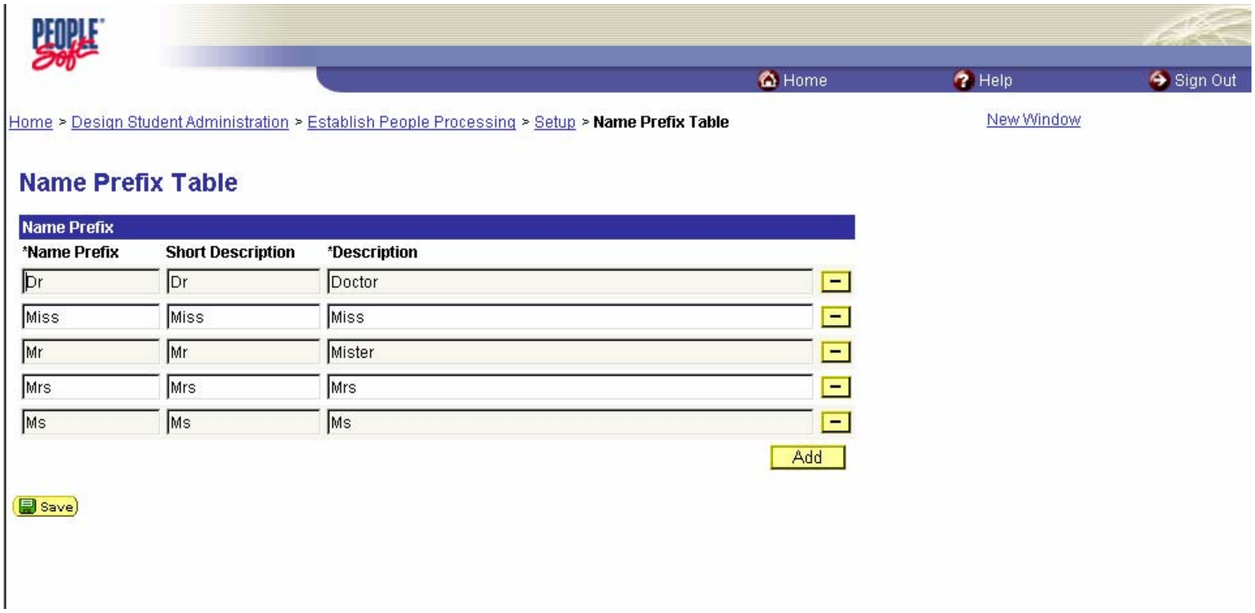
Use the predefined USA values that are shipped with the PeopleSoft System.

3.7 Name Prefix Table

The Name Prefix Table enables you to enter all of the name prefixes you might use at your institution. Name prefixes are usually used in more formal writing; suffixes may be used in communications sent to parents and donors.

Page Name: **Name Prefix Table**

Navigation: **Home→ Design Student Administration → Establish People Processing → Setup → Name Prefix Table**



3.7.1 Considerations

Some Name Prefixes are shipped with your system. You can add more prefixes if necessary.

If you have already implemented PeopleSoft HRMS at your institution, the standard name prefixes used at your institution should already be entered.

3.7.2 Recommendations

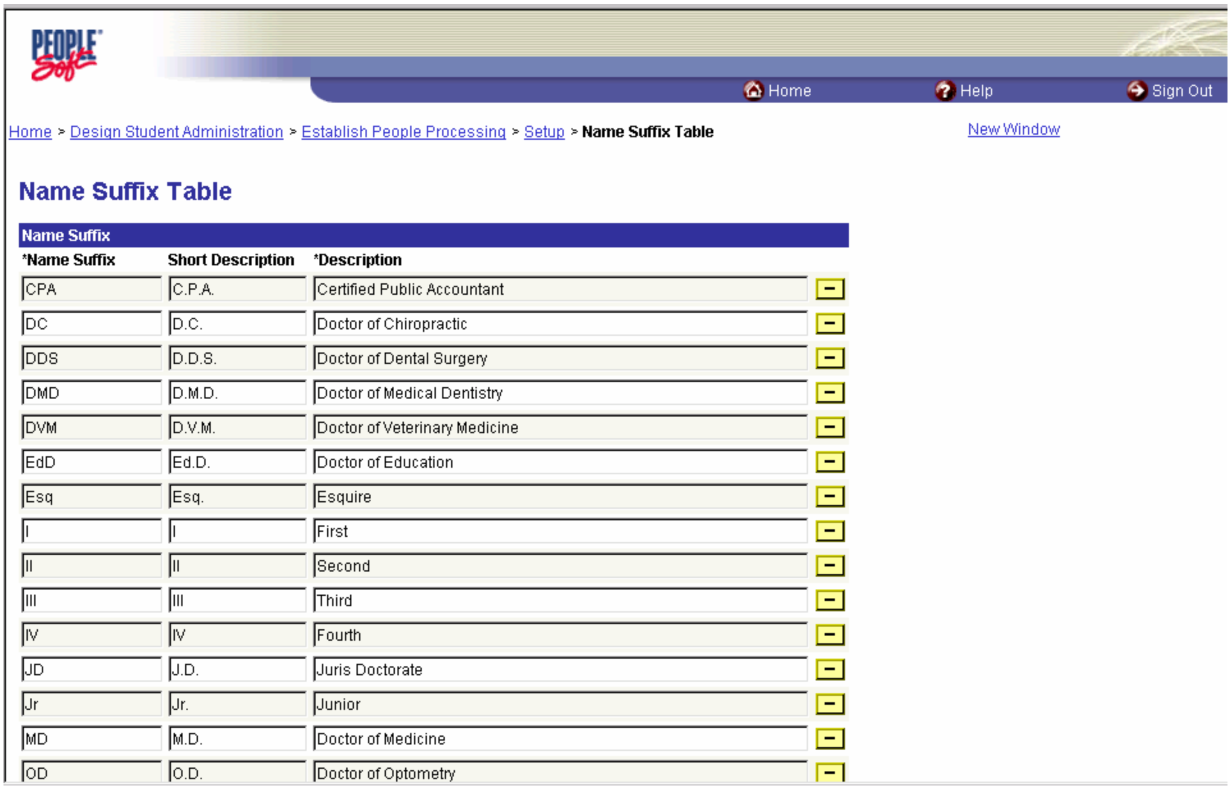
The Name Prefix Table should be setup according to campus specific business requirements.

3.8 Name Suffix Table

The Name Suffix Table enables you to enter all of the name suffixes you might use at your institution. The Name Suffix is usually a title of courtesy usually placed after a person's name. Use the Name Suffix Table page to enter the suffixes that you want to make available for use with names in your system.

Page Name: Name Suffix Table

Navigation: Home→ Design Student Administration → Establish People Processing → Setup → Name Suffix Table



*Name Suffix	Short Description	*Description
CPA	C.P.A.	Certified Public Accountant
DC	D.C.	Doctor of Chiropractic
DDS	D.D.S.	Doctor of Dental Surgery
DMD	D.M.D.	Doctor of Medical Dentistry
DVM	D.V.M.	Doctor of Veterinary Medicine
EdD	Ed.D.	Doctor of Education
Esq	Esq.	Esquire
I	I	First
II	II	Second
III	III	Third
IV	IV	Fourth
JD	J.D.	Juris Doctorate
Jr	Jr.	Junior
MD	M.D.	Doctor of Medicine
OD	O.D.	Doctor of Optometry

3.8.1 Considerations

In v7.6 Human Resources recommended that the suffix be entered as part of the name because a suffix field did not exist on the Personal Data panels. However, with the upgrade to HR v8.0 PeopleSoft introduced the NAME_SUFFIX field in HR, which would allow users to enter a name suffix into a distinct field. During the upgrade of v7.6 to v8.0 of HR, PeopleSoft delivered upgrade scripts that would parse out the suffix from the last name into the new NAME_SUFFIX field.

The Student Administration application has contained the suffix field since v7.6, and the modifications developed by the Baseline Student Administration team for v 8.0 utilize the NAME_SUFFIX field for external downloads. Therefore, if the campus wishes to have all names entered in to the database in a similar manner the suffix should be entered in the Suffix field in HRSA.

3.8.2 Recommendations

For uniformity, it is the recommendation of HRSA Baseline team to support consistency and the usage of the NAME_SUFFIX field.

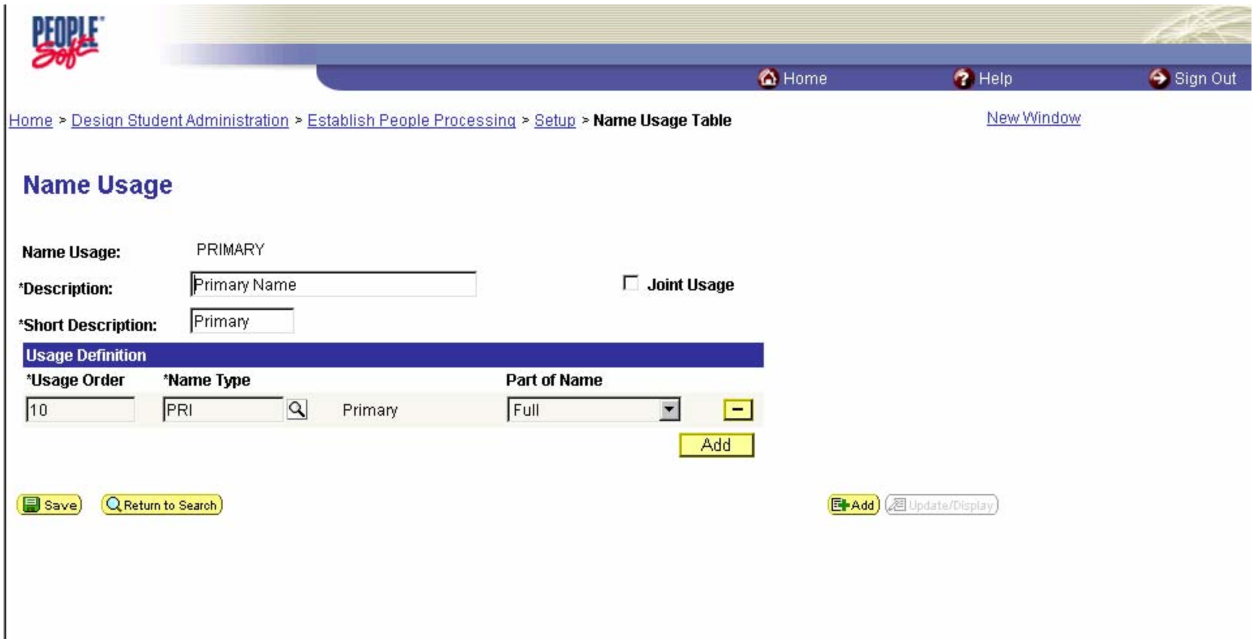
3.9 Name Usage Table

Your database can contain many different name types for each person. Use the Name Usage Table to define the hierarchy of name types your institution wants the system to use. For example, you might want your system to always use an individual's Title if they have one, and if not, then use the individual's Full Name.

Also, when you want to send out a piece of correspondence to someone, you need to be able to specify which of the many names should be used.

Page Name: **Name Usage Table**

Navigation: **Home→ Design Student Administration → Establish People Processing → Setup → Name Usage Table**



3.9.1 Considerations

You can use the Name Usage Table to set up the types of names you want to use in specific instances. You can set up name usage for very general or specific uses—it's up to you.

For example, if you're sending out an Admit Letter to an applicant you might want to use the preferred first name in the salutation of the letter—Dear Dave—but you want to use the formal name in the address portion of the letter and on the envelope—David Miller. You can also specify the next name or names that should be used if the first name type specified by a name usage is not in the system.

3.9.2 Recommendations

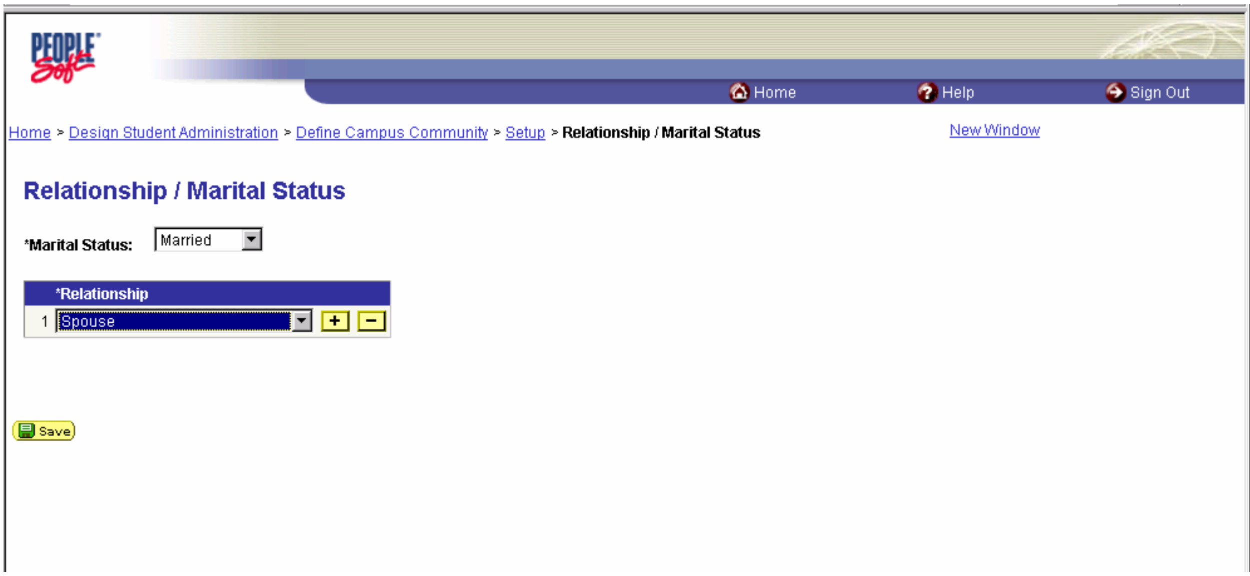
The Name Usage Table should be setup according to campus specific business requirements.

3.10 Relationship/Marital Status Table

Use the Relationship / Marital Status page to set the system to verify marital status when you create relationships between two individuals, and warn you when data is inconsistent.

Page Name: **Marital Status Table**

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Relationship/Marital Status**



3.10.1 Considerations

Marital Status values are delivered with your system as translate values.

You should not modify the Marital Status values. Any modification to these values may require substantial customizing or programming effort.

3.10.2 Recommendations

Use delivered PeopleSoft values

3.11 Location Address Table

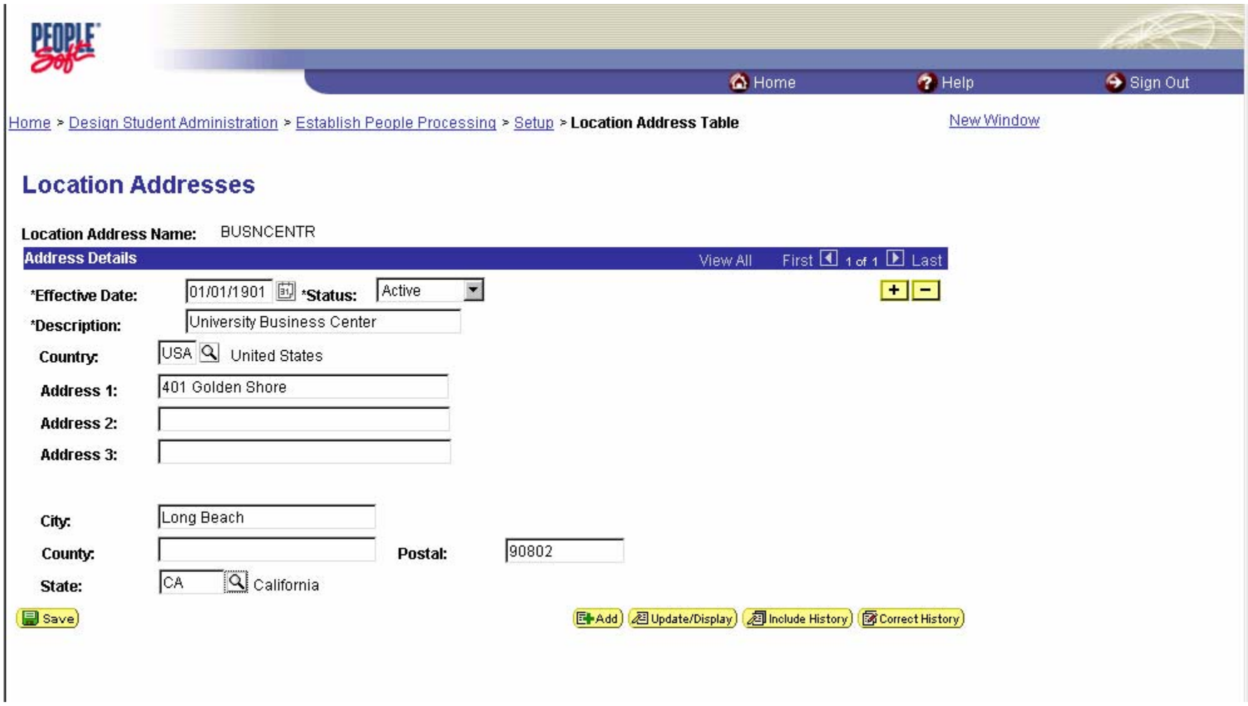
In addition to maintaining external addresses for individuals in your database, you will probably want to link individuals to specific campus locations.

Use the Location Address Table page to define addresses for specific locations on campus.

After you have entered address locations here, you can link an individual to any of the locations using the Addresses panel.

Page Name: **Location Address Table**

Navigation: **Design Student Administration → Establish People Processing → Setup → Location Address Table**



3.11.1 Considerations

Will the campus use the address link functionality in PeopleSoft.

3.11.2 Recommendations

The Location Address Table should be setup according to campus specific business requirements.

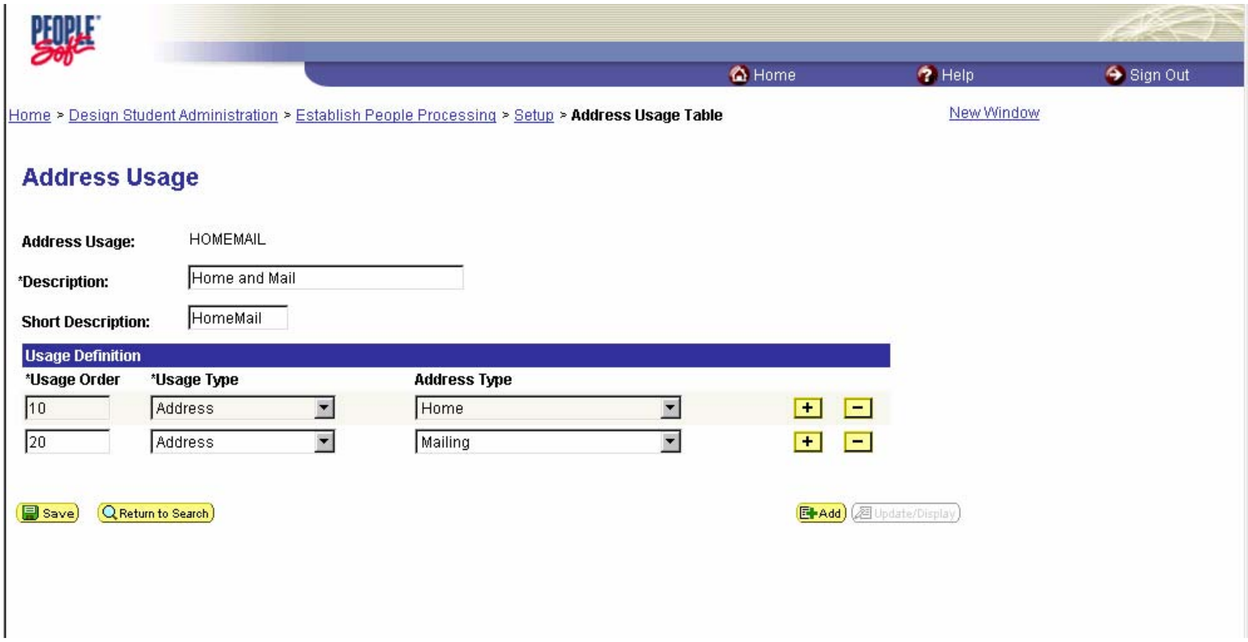
3.12 Address Usage Table

Your database can contain multiple addresses for each person. When you send correspondence to someone, you need to be able to specify which of the addresses should be used. Use the Address Usage Table to set up the types of addresses you want to use in specific instances, and which address to use instead if no data exists for the previous selection. You can set up address usage for very general or specific uses—it’s up to you.

For example, if you’re sending an Admit Letter to an applicant you might want the system to use the individual's home address for that correspondence, but if no data exists for the Home address type, then you want the system to search for and use the individual's mailing address. If there is no data for the Mailing address type, you might want the system to search for and use the individual's Permanent address type, and so on.

Page Name: **Address Usage Table**

Navigation: **<u>Home→ Design Student Administration → Establish People Processing → Setup → Address Usage Table</u>**



3.12.1 Considerations

The Address Usage Table is shared across all applications of your Student Administration system. We suggest that you coordinate with other departments to consistently define and update the Address Usage tables to ensure these are easily shared.

Address Types must first be defined before the Address Usage Table can be setup.

3.12.2 Recommendations

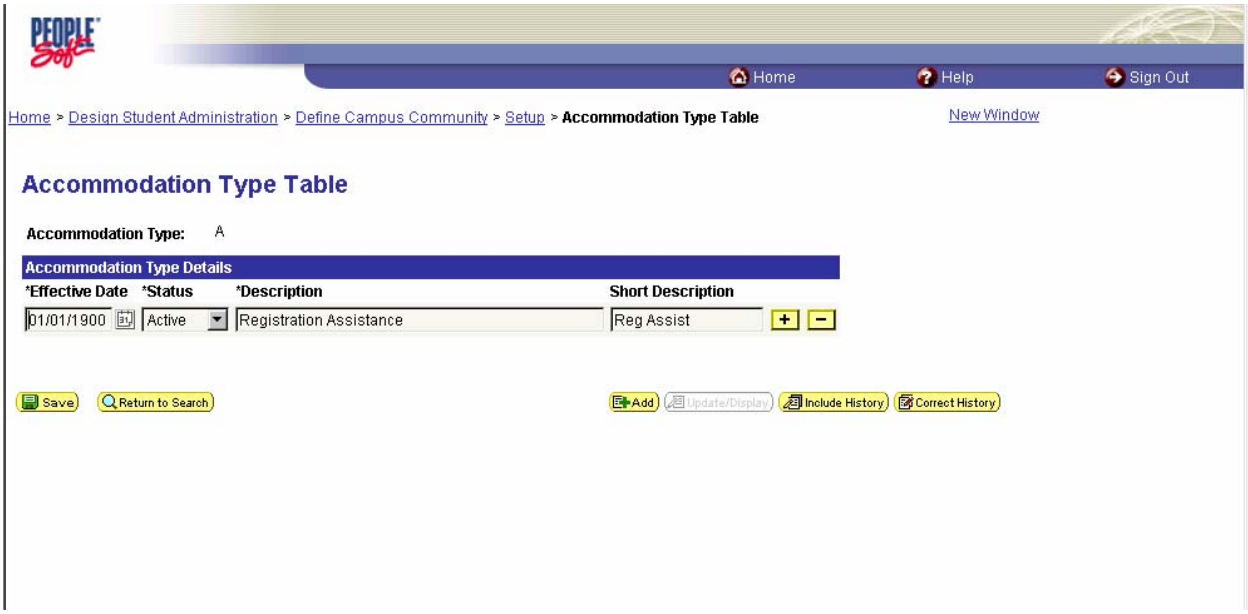
The Address Usage Table should be setup according to campus specific business requirements.

3.13 Accommodation Type

Accommodation types enable you to specify the types of accommodations that your institution is able to make for individuals with disabilities, such as purchasing special equipment or making structural changes to a classroom or work environment.

Page Name: **Accommodation Type Table**

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Accommodation Type Table**



3.13.1 Considerations

Will your campus utilize the Accommodation Data panels? This component allows you to track accommodation requests, options and job task information for employees and staff.

3.13.2 Recommendations

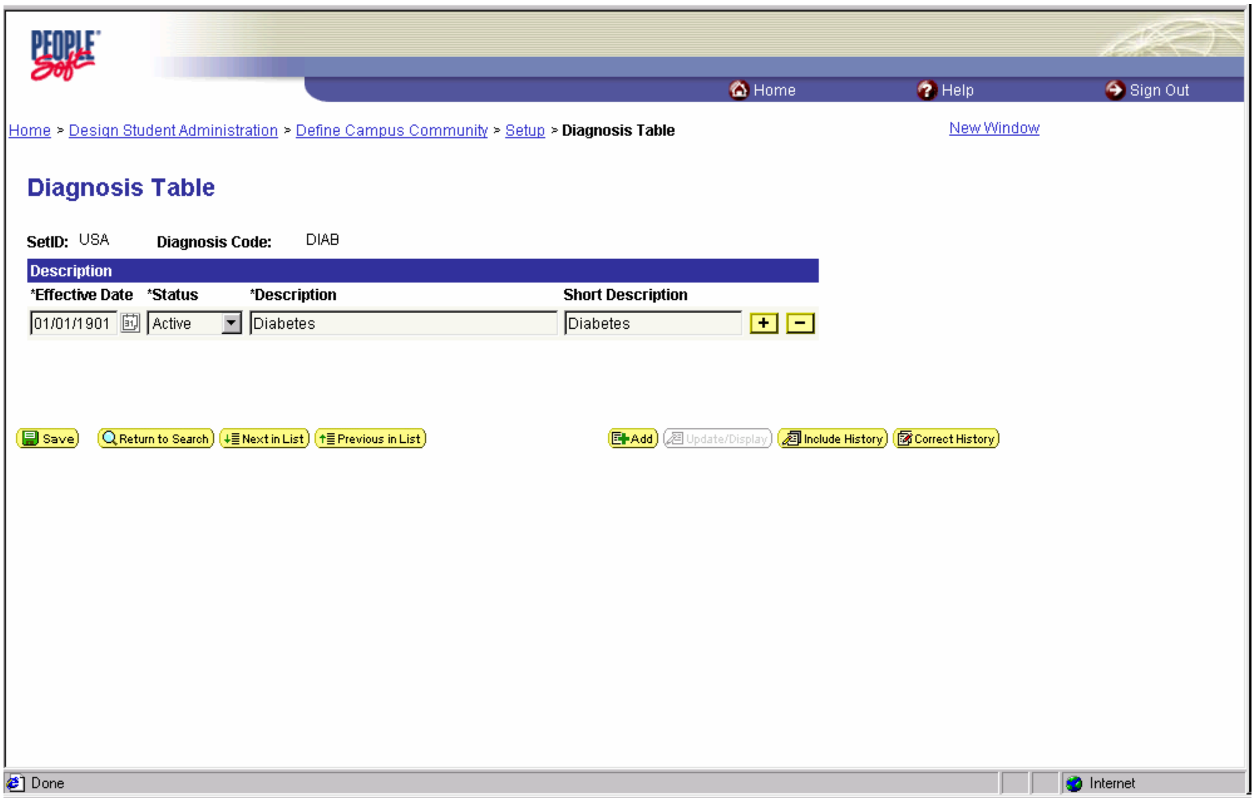
The Accommodation Type Table should be setup according to campus specific business requirements.

3.14 Diagnosis Table

Physicians often use standard terminology to describe the results of their examinations, and you will find it helpful to use the same terms when you monitor health and safety incidents at your institution. Use the Diagnosis Code Table to enter the standard codes physicians' use for injuries and illnesses typical of occurrences at your institution.

Page Name: **Diagnosis Table**

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Diagnosis Table**



3.14.1 Considerations

This field is used in the HR system to generate a Personnel/Payroll Transaction (PPT) Form. Any changes made to the field values might impact HR PPT processing.

3.14.2 Recommendations

This table has been delivered with SOSS provided values. Individual campuses need to determine if they will use the Disability and Accommodation panels in their campus specific business processes.

3.15 Athletic Participation

You can set up Athletic Participation codes to help you define an individual's level of involvement in an athletic endeavor at your institution.

Page Name: Athletic Participation Table

Navigation: **<u>Home→ Design Student Administration → Define Campus Community → Setup → Athletic Participation Table</u>**

3.15.1 Considerations

Individual campuses need to decide if they will use the Athletic Participation panels to identify athletes at their institution and track student's athletic participation and eligibility.

3.15.2 Recommendations

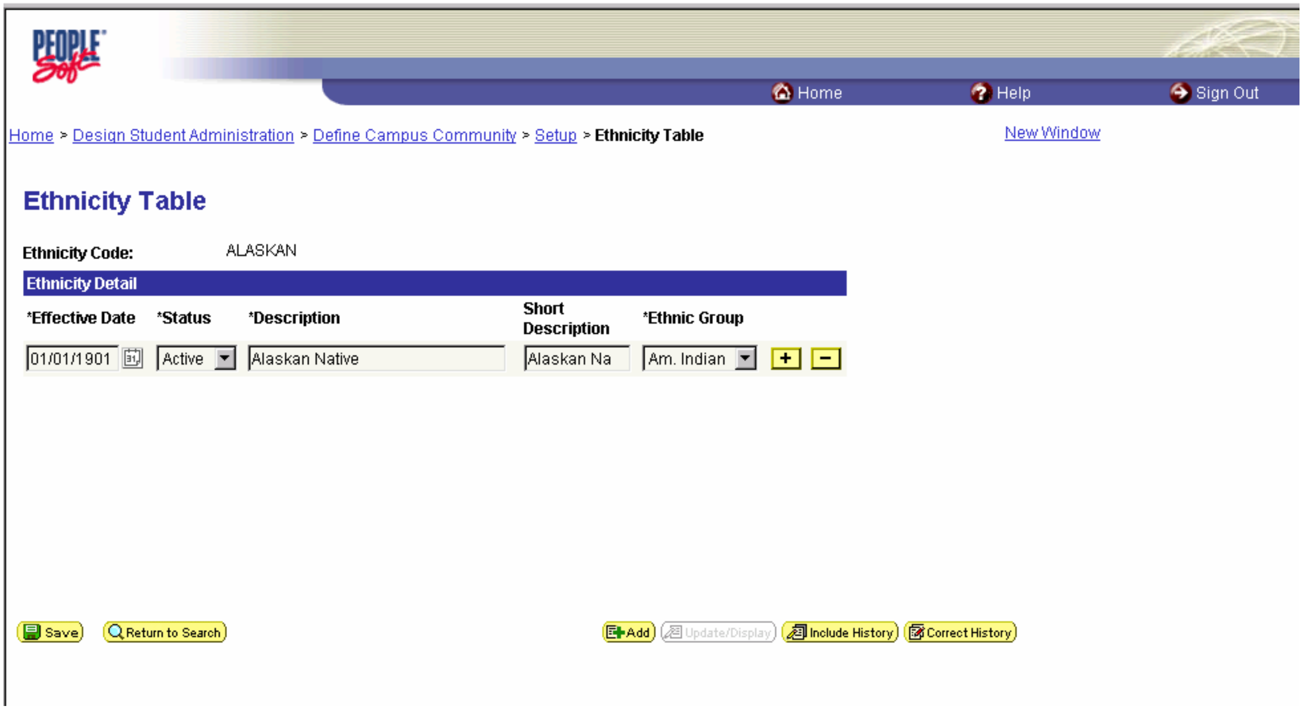
The Athletic Participation Table should be set up based on campus specific business requirements.

3.16 Ethnicity Table

For purposes of reporting to the United States government, students must be placed in one of a limited number of ethnic groups (American Indian, Asian, Black, Hispanic, or White). However, your institution may want to track ethnicity on a more diverse level. You can also specify the government ethnic group to which each ethnicity code belongs.

Page Name: Ethnicity Table

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Ethnicity Table**



3.16.1 Considerations

Campus Community Baseline Modification CC99002 derives the Ethnic Group for a person based on the Primary Ethnicity Detail that is chosen for a person.

The values for the Ethnicity Code have been defined by the Chancellor's Office (ERS, PIMS, Govt Code 11092, 11092.5 and 8310.5).

3.16.2 Recommendations

Ethnicity Information should be mapped following this chart below.

CO ERS Ethnic Code	People Soft Ethnic Label	PeopleSoft Alpha Code
1 - American Indian or Alaskan Native	American Indian	AMINALN
2 - African American	African American	AFRAM
3 - Mexican – American, Mexican, Chicano	Mexican American	MEXAMER
4 - Other Latino/Spanish-Origin/Hispanic	Hispanic Origin	HISPANIC
5 - Other Asian	Other Asian	OTHRASN
6 – Other Pacific Islander	Other Pacific Islander	OTHRPACI
7 – White	White	WHITE
8 – Other	Other	OTHRNWT
9 – No Response	No Response	NORESPON
A – Central American	Central American	CENTAMER
B – South American	South American	SOAMER
C – Chinese	Chinese	CHINESE

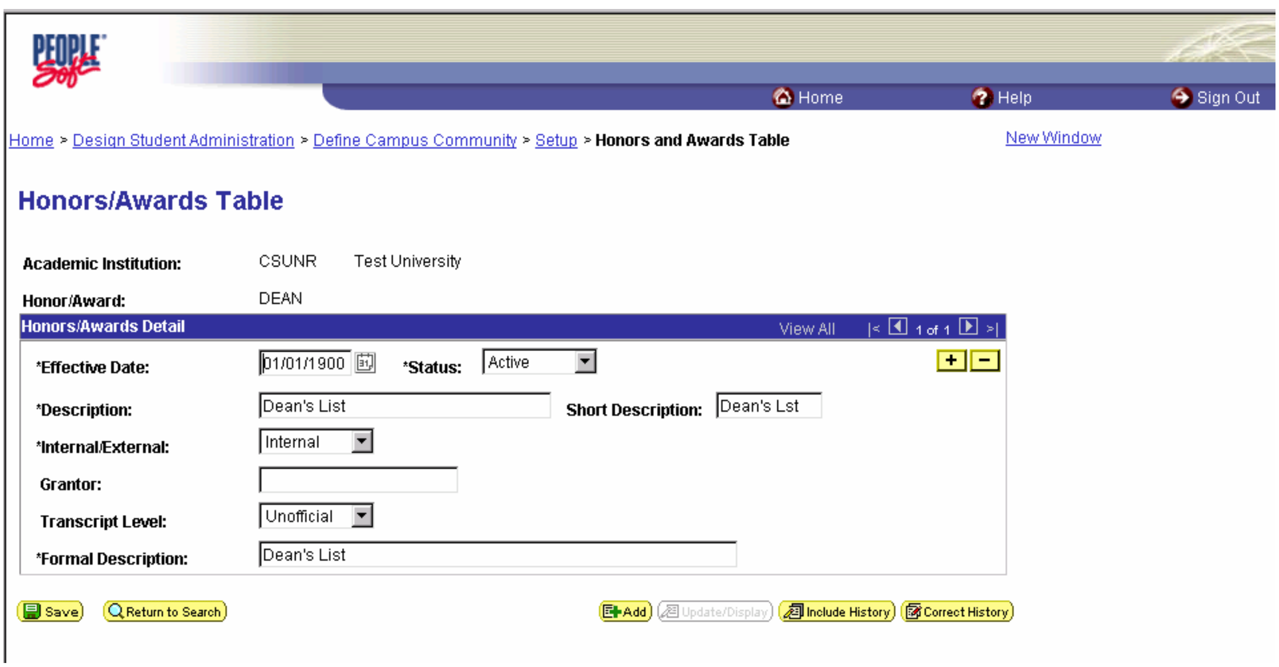
CO ERS Ethnic Code	People Soft Ethnic Label	PeopleSoft Alpha Code
D – Decline to State	Decline to State	DECLINE
F – Filipino	Filipino	FILIPINO
G – Guamanian	Guamanian	GUAMANIA
H – Hawaiian	Hawaiian	HAWAIIAN
J – Japanese	Japanese	JAPANESE
K – Korean	Korean	KOREAN
L – Laotian	Laotian	LAOTIAN
M – Cambodian	Cambodian	CAMBOD
N – Samoan	Samoan	SAMOAN
P – Puerto Rican	Puerto Rican	PUERTOR
Q – Cuban	Cuban	CUBAN
R – Asian Indian	Asian Indian	ASINDIAN
S – Other Southeast Asian	Other Southeast Asian	OTHRSEAS
T – Thai	Thai	THAI
V – Vietnamese	Vietnamese	VIETNAME

3.17 Honors/Awards Table

Honors and awards allow you to track internal and external awards for students. These awards might include Dean's List and President's Award.

Page Name: **Honors and Awards**

Navigation: **Home→ Build Community → Maintain People Data → Use A-K → Honors and Awards**



3.17.1 Considerations

Honor/award codes are a precursor for setting up your honor/award rules.

3.17.2 Recommendations

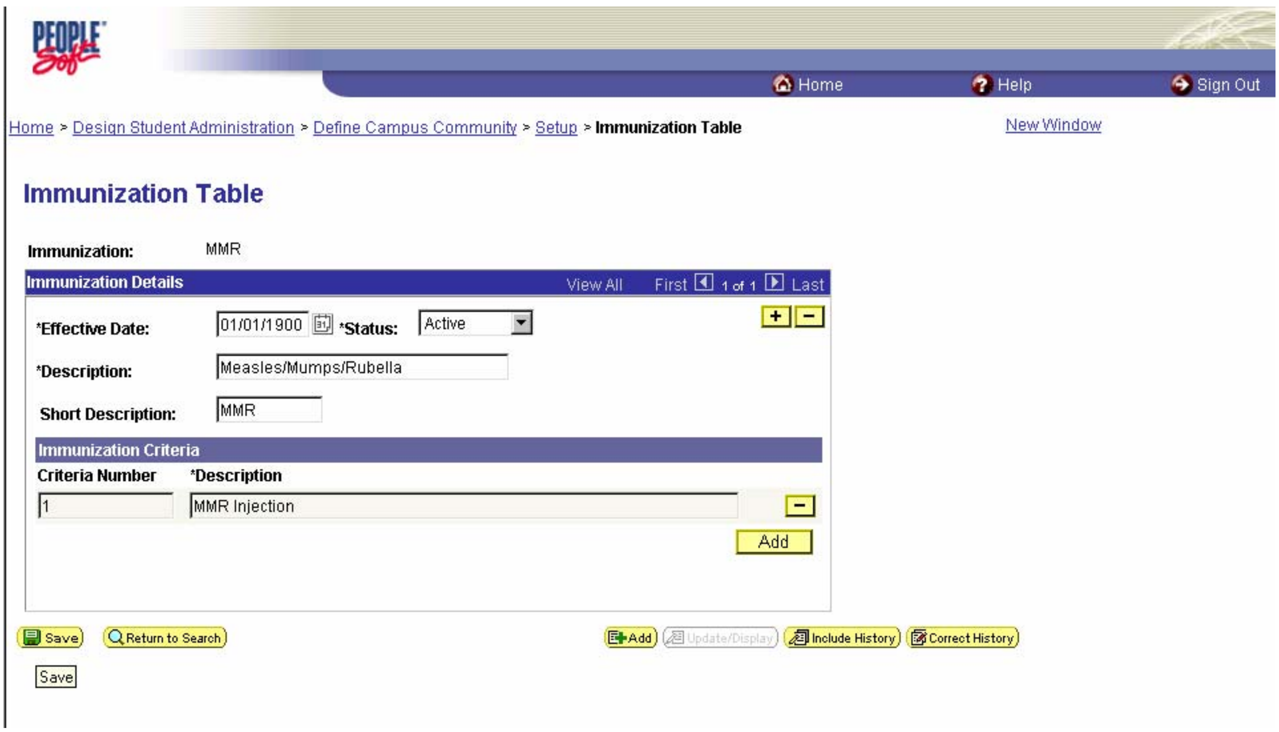
The Honors/Awards Table should be set-up to campus specific business rules.

3.18 Immunization Table

You can set up codes to identify the immunization and general health tests that your institution requires or that students may choose to report to you or that students may find themselves in need of while on campus.

Page Name: Immunization Table

Navigation: Home→ Design Student Administration → Define Campus Community → Setup → Immunization Table



3.18.1 Considerations

Will your campus track immunizations for students.

3.18.2 Recommendations

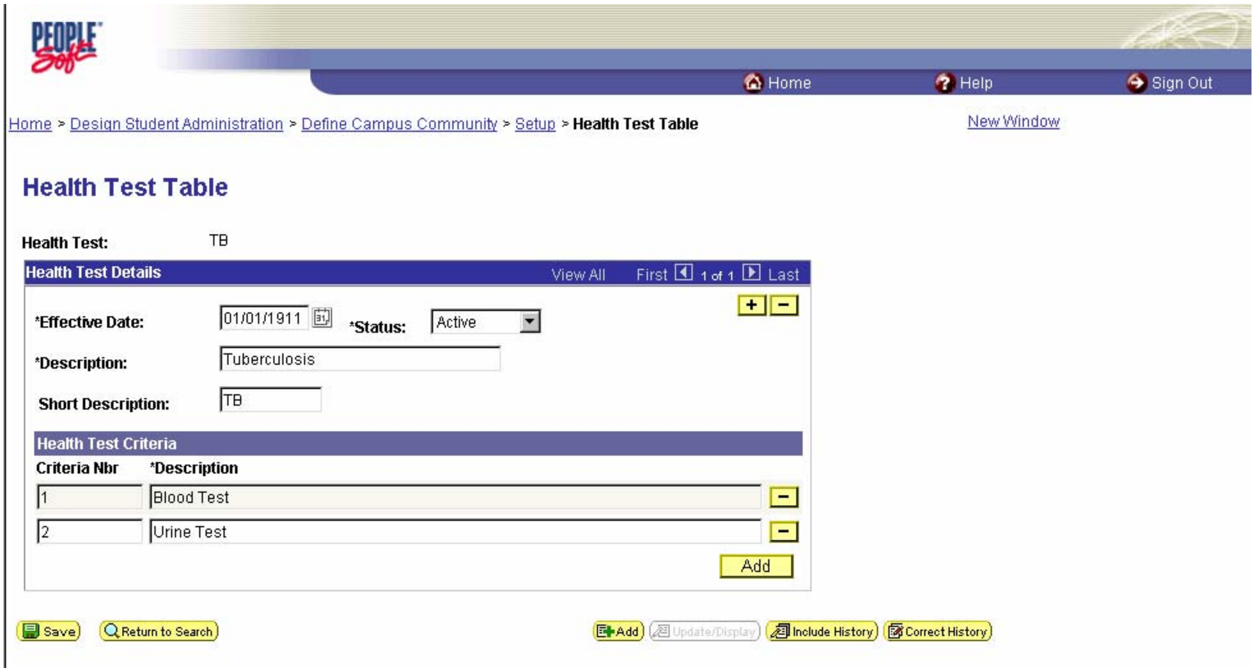
Use the Immunization Table to identify codes for immunizations of interest to your campus.

3.19 Health Test Table

You can set up codes to identify the immunization and general health tests that your institution requires or that students may choose to report to you or that students may find themselves in need of while on campus.

Page Name: **Health Test Table**

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Health Test Table**



3.19.1 Considerations

Will your campus track health test information in PeopleSoft for students.

3.19.2 Recommendations

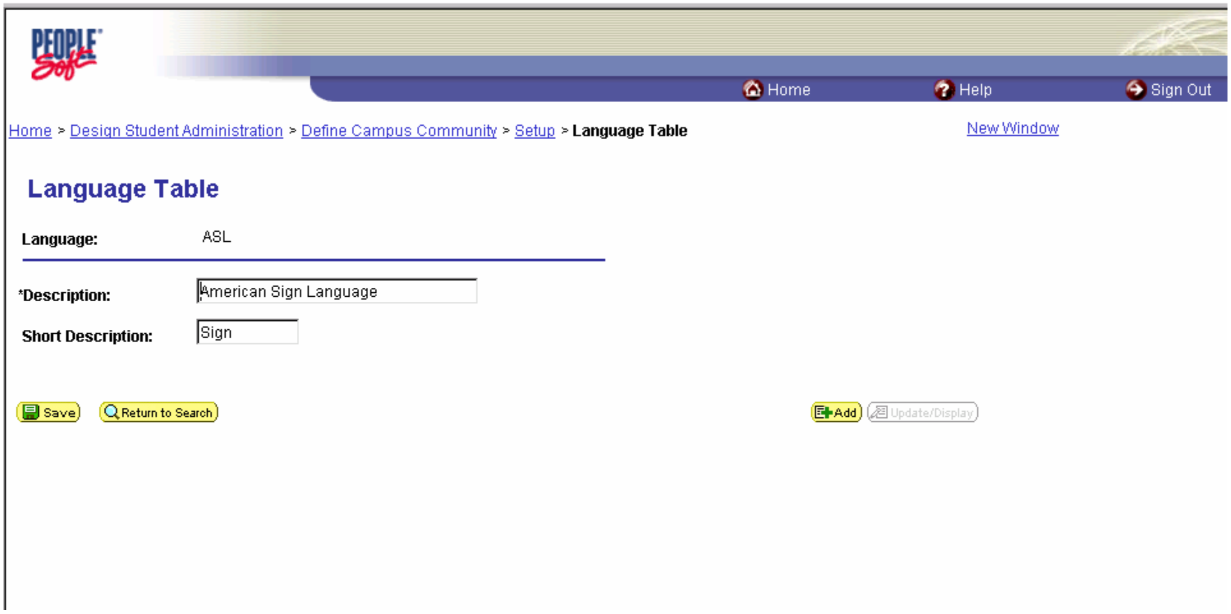
Use the Health Test Table to define codes for the health tests of interest to your campus.

3.20 Language Table

You can set up codes for languages of interest to your institution. You can then use those codes to indicate which languages an individual in your database can read, speak, or write and to what degree of proficiency. These values are stored as Accomplishments on the Accomplishment Table. In Student Administration this is used for informational purposes only.

Page Name: **Language Table**

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Language Table**



3.20.1 Considerations

The delivered list of values represent the minimum set of values that will be delivered in the baseline product. If additional values are needed they can be added at a campus level.

Will your campus track language information for students.

3.20.2 Recommendations

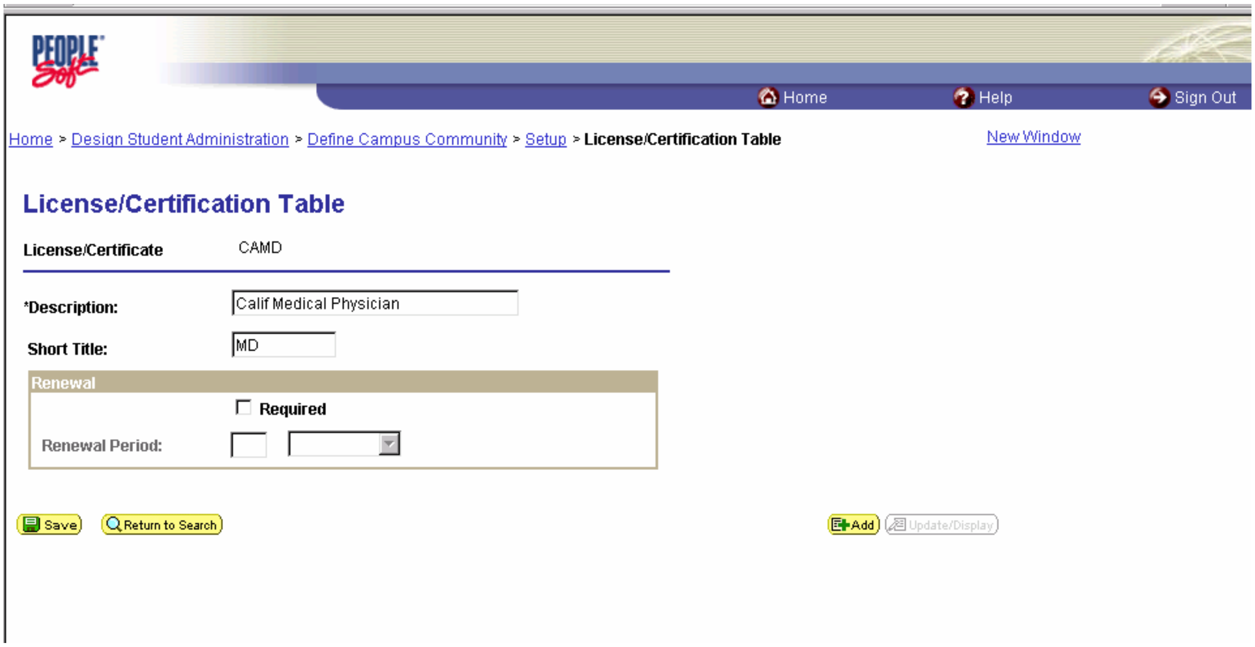
Use the Language Table in accordance with campus business practices.

3.21 License/Certification Table

You can set up codes for the licenses and certificates of interest to your institution. You can then use the codes to enter data about credentials and certifications earned by individuals in your system.

Page Name: **License/Certification Table**

Navigation: **Design Student Administration → Define Campus Community → Setup → License/Certification Table**



3.21.1 Considerations

The values that are included in the system are required by HR for the PIMS system. These values will be maintained by SOSS. Since this is a shared table, campuses are free to augment this list at any time. Any additional campus defined licenses or certification values will be campus maintained.

This field is used in the HR system to generate a Personnel/Payroll Transaction (PPT) Form. Any changes made to the field values might impact HR PPT processing.

3.21.2 Recommendations

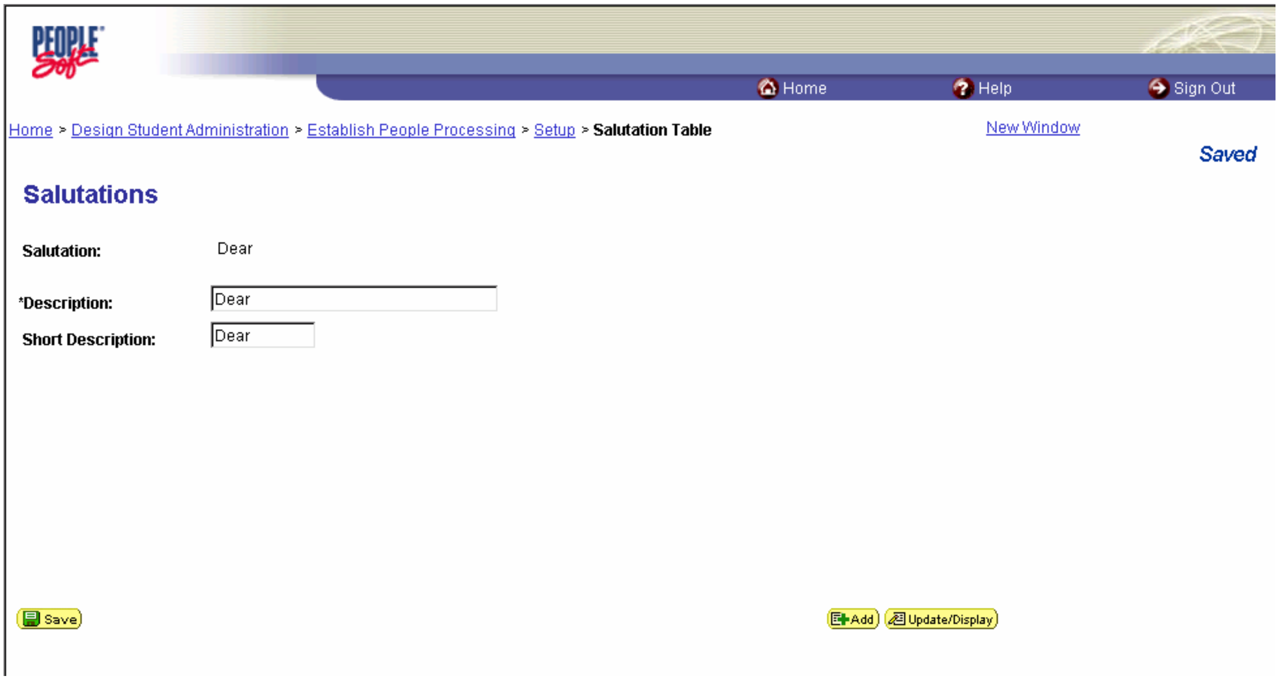
Use the License/Certification Table in accordance with campus business practices.

3.22 Salutation Table

Use the Salutation Table to set up all of the salutations used by your campus.

Page Name: Salutation Table

Navigation: **Home→ Design Student Administration → Establish People Processing → Setup → Salutation Table**



3.22.1 Considerations

Will your campus send out communications that include salutations?

3.22.2 Recommendations

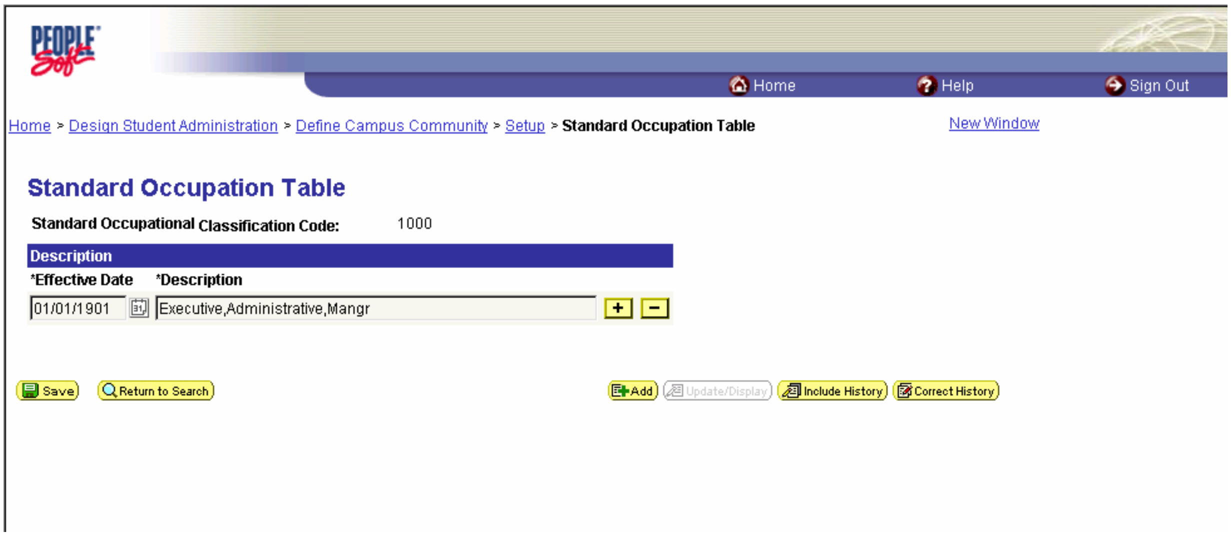
Set-up the Salutation Table in accordance with your campus specific business processes.

3.23 Standard Occupation Table

The Standard Occupation Table reflects the US Standard Occupation Classification (SOC) codes as required by the US Department of Labor. Use the Standard Occupation Table to set up or review the valid SOC codes required by your institution.

Page Name: Standard Occupation Table

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Standard Occupation Table**



3.23.1 Considerations

You may need to review the valid SOC codes to make sure all valid values for your campus are included.

These codes are used by SERP for studies on retention, workforce analysis and Advancement.

3.23.2 Recommendations

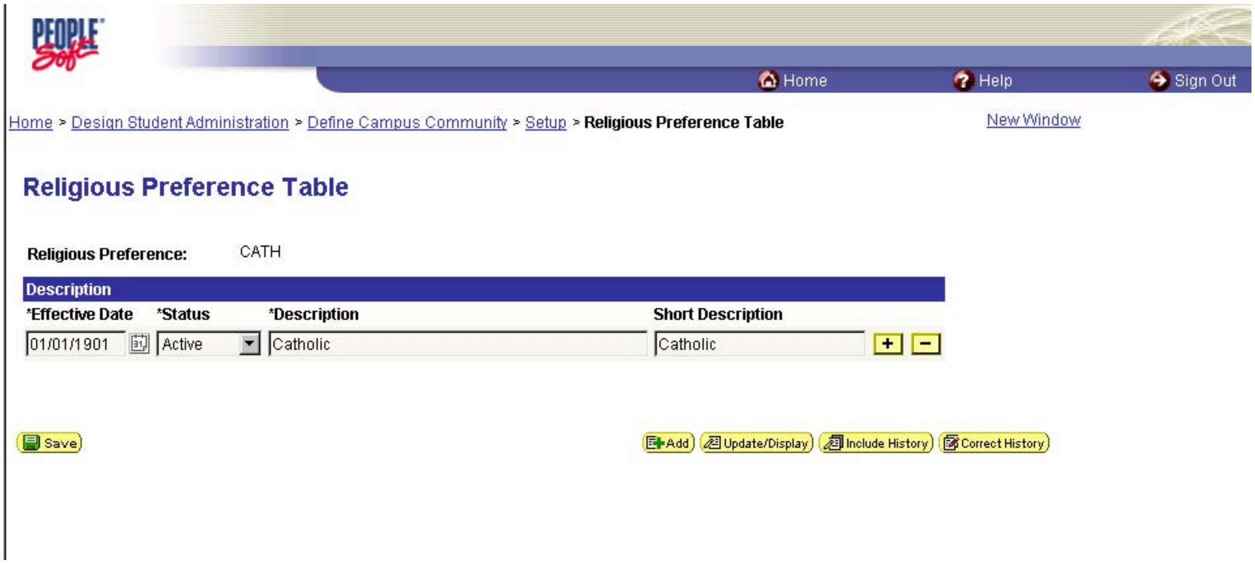
Update the SOC Table based on campus specific needs. Most values have been delivered with the Baseline system.

3.24 Religious Preference Table

Use can use the Religious Preferences Table to define the religious preferences that individuals at your institution may have.

Page Name: Religious Preference Table

Navigation: <u>**Home→ Design Student Administration → Define Campus Community → Setup → Religious Preference Table**</u>



3.24.1 Considerations

Will your campus track this information for students or staff?

3.24.2 Recommendations

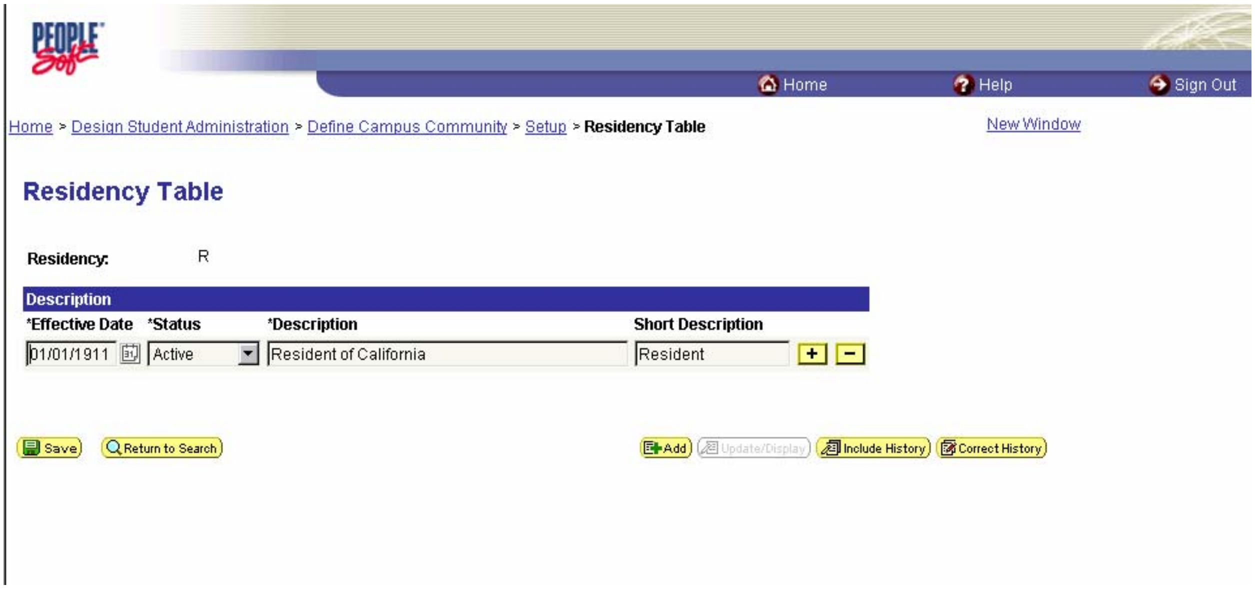
The Religious Preference Table should be set-up in accordance with your campus specific business requirements.

3.25 Residency Table

Residency codes indicate an individual's residency. Residency is used in the calculation of registration fees and can also be used in the Financial Aid portion of the system to determine budgets and awards.

Page Name: **Residency Table**

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Residency Table**



3.25.1 Considerations

3.25.2 Recommendations

The Residency Table should be set-up in accordance with the ERS Residence Status values.

ERS Values –

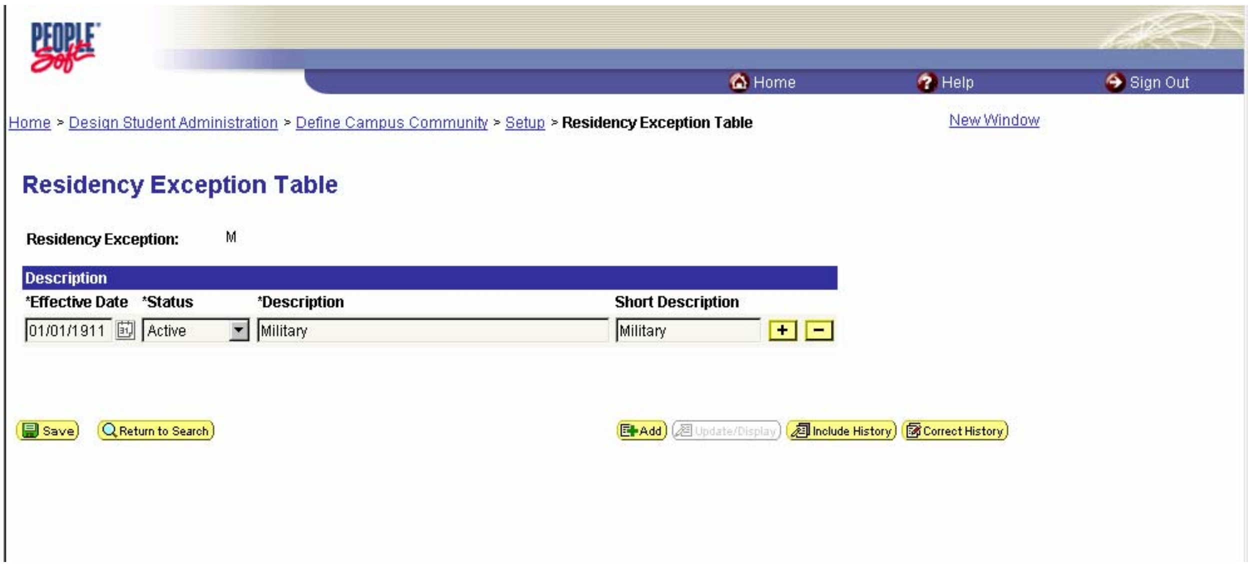
R = Resident of California
N = Another State or U.S. Possession
F = Foreign Country
X = Residence Status Undetermined

3.26 Residency Exception Table

Residency exceptions enable you to note exceptions to residency rules for purposes such as tuition calculation. For example, an individual may be exempt from non-residency requirements because they are in the military.

Page Name: Residency Exception Table

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Residency Exception Table**



3.26.1 Considerations

3.26.2 Recommendations

The Residency Exception Table should be set-up in accordance with the ERS Residence Status values.

ERS Values –

M = Military
S = Faculty, Staff
T = Teachers
O = Other (e.g., Alan Pattee Scholarship)

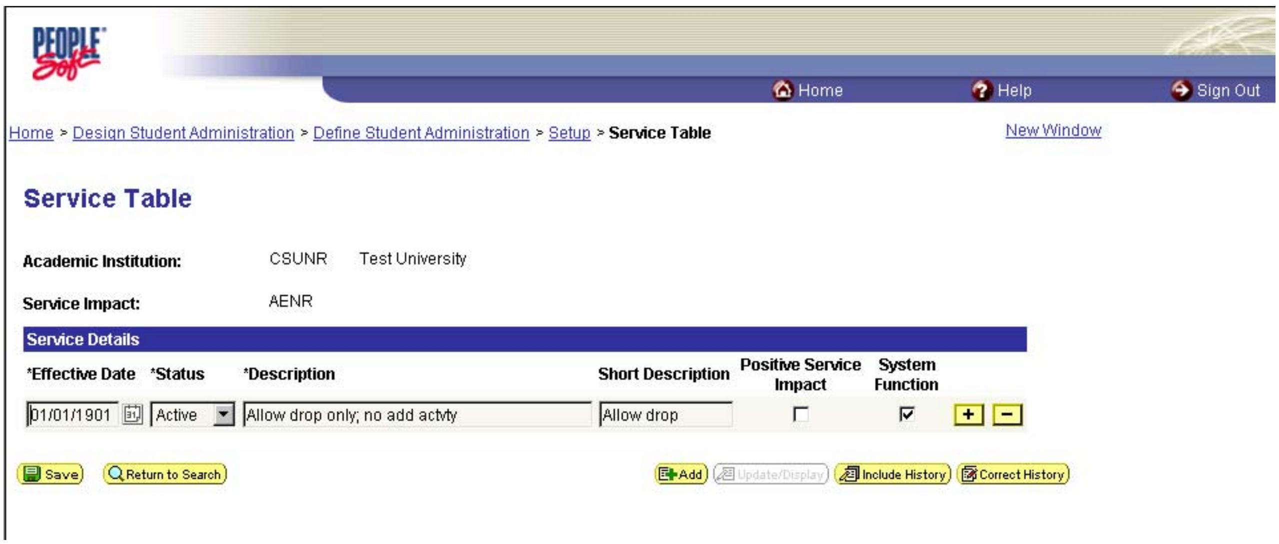
3.27 Service Indicator Impacts

You can use Service indicators to provide or limit access to services for an individual in your system. Service Indicators may be defined as holds to prevent an individual from receiving certain services, or as positive indicators to designate those special services that should be provided. Some examples of negative service indicators include no check cashing privileges, grade or transcript holds, and denied registration for classes. Positive service indicators might include check cashing privileges, front of line service, use of the gym, or special services for disabled students.

The first step in setting up a Service Indicator is to define the Service Impacts. A Service Indicator consists of one or more Service Impacts to indicate which services can be restricted or provided to individuals. Use the Service Table to define Service Impacts.

Page Name: Service Table

Navigation: Home→ Design Student Administration → Define Student Administration → Setup→ Service Table



3.27.1 Considerations

Student Records requires three of these values with code attached to them that affects enrollment for the current term during enrollment request processing. *These three Service Impact values should be typed exactly and should not be modified.*

CENR	This value restricts all enrollment activity (such as adds, drops, swaps, or wait lists) for a student with existing enrollment for the current term.
IENR	This value prevents a student from initially enrolling into a class but permits the student to add or drop classes if they already have enrollment activity for the current term.
AENR	This value prevents a student from initially enrolling into a class and prevents the student from adding a class, but permits the student to drop classes if they have already have enrollment activity for the current term.
TRAN	This value prevents a student from receiving an academic transcript.

Do not change the System Function check box if the system displays it already selected.

3.27.2 Recommendations

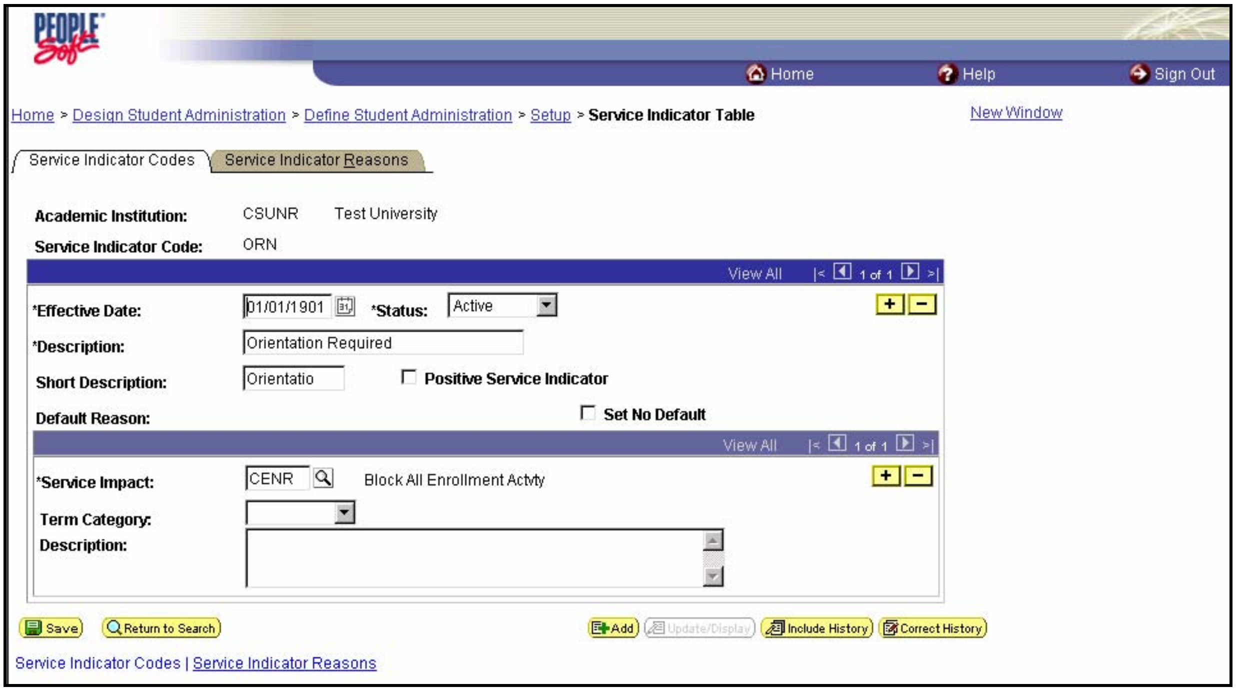
The Service Table should be set-up in agreement with campus specific business processes.

3.28 Service Indicators

After you have defined the Service Impacts you can use the Service Indicator Table page to define both positive and negative service indicators, and the reasons for those indicators.

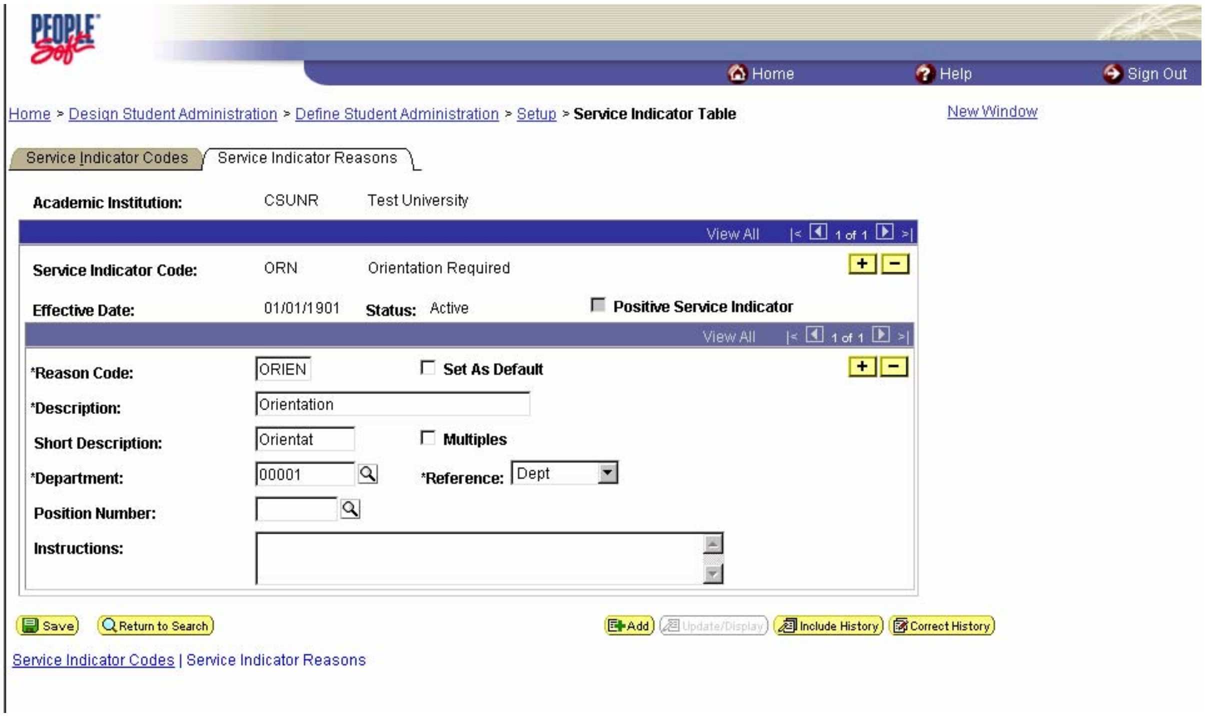
Page Name: Service Indicator Tables

Navigation: **Home→ Design Student Administration → Define Student Administration → Setup→ Service Indicator Tables → Service Indicator Table**



Page Name: **Service Ind Reason Table**

Navigation: **Home→ Design Student Administration → Define Student Administration → Setup→ Service Indicator Tables → Srvc Ind Reason Table**



3.28.1 Considerations

Each Service Indicator may be applied with one or more Service Impact codes.

You may need to gather information from various departments on campus to define all holds within your PeopleSoft System.

Interfaces may be need to external systems such as CashNet.

The Department on the Service Indicator Reason page is a required field for Service Indicators. This Department comes from the Department Table page. HR mostly uses this Department Table, and you will need to grant security access to users that need to setup Service Indicators.

3.28.2 Recommendations

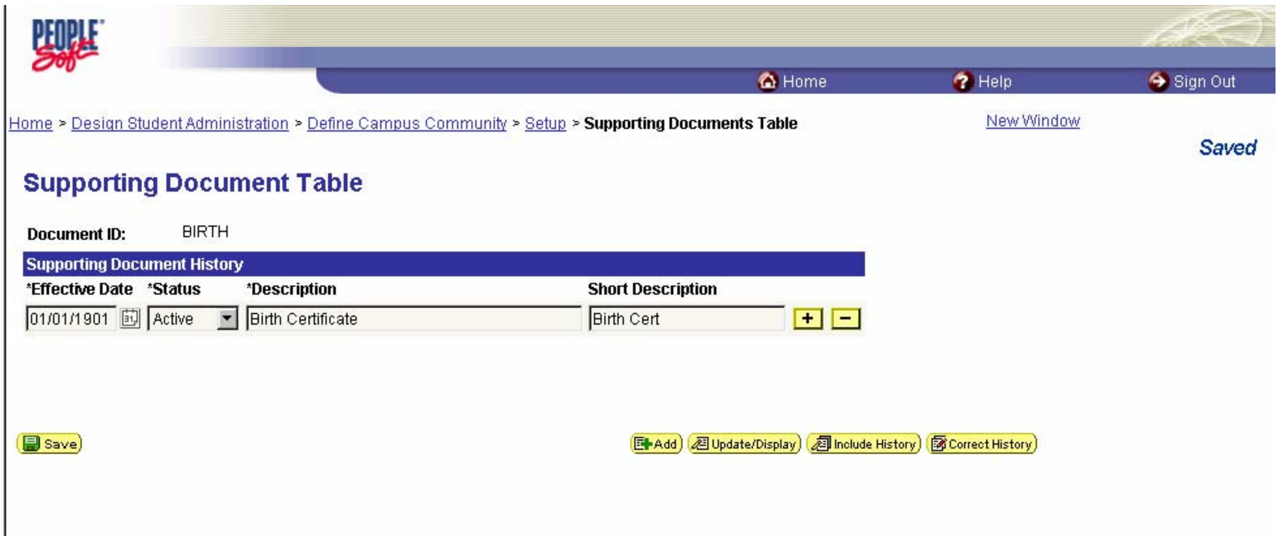
The Service Indicator Table should be set-up in agreement with campus specific business processes

3.29 Supporting Documents Table

Use the Supporting Document Table to enter identification codes for documents such as birth certificates, letters of employment, and immigration application letters, required to obtain I-9 verification for individuals attending your institution.

Page Name: Supporting Document Table

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Supporting Documents Table**



3.29.1 Considerations

If you have implemented PeopleSoft HRMS, many supporting document IDs may already be in your system.

3.29.2 Recommendations

The Supporting Documents Table should be set-up in agreement with campus specific business processes

3.30 Visa Permit Table

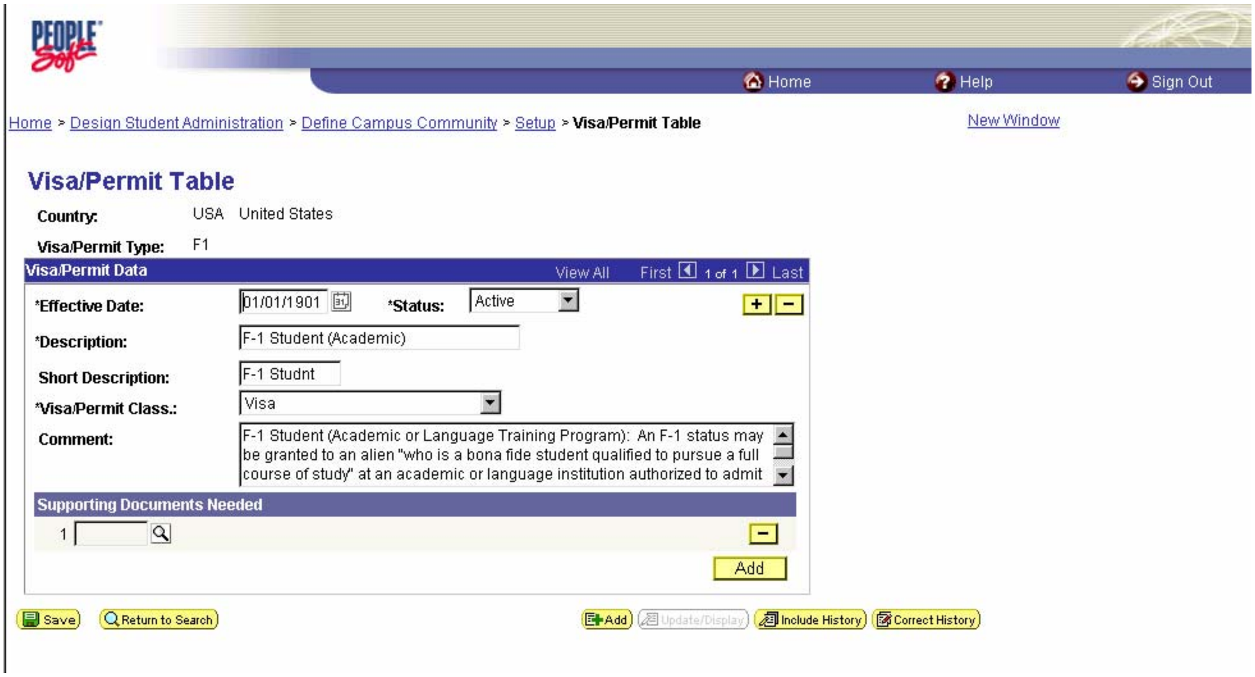
If your institution hires students or other individuals who are not citizens of the same country where your institution is, you'll find it useful to set up codes classifying the types of visas and permits required by the appropriate governments.

Use the Visa and Permit Types table to enter information on visas and permits required for non-citizens at your institution.

The Visa Permit Type is the person's visa, residence, or work permit type as issued by the US Immigration and Naturalization Services Department.

Page Name: **Visa/Permit Table**

Navigation: **Home→ Design Student Administration → Define Campus Community → Setup → Visa/Permit Table**



3.30.1 Considerations

These values will be maintained by SOSS.

This field is used in the HR system to generate a Personnel/Payroll Transaction (PPT) Form. Any changes made to the field values might impact HR PPT processing.

3.30.2 Recommendations

ERS Citizenship Codes should be mapped for reporting purposes in the following manner:

CO Data Element Definition	PeopleSoft Citizenship Status	PeopleSoft Visa Permit Type	PS Field Value
Y = United States Citizen	U.S. Citizen		
I = Non-U.S. citizen, received I-151	Non-U.S. Citizen Permanent	IAR	IAR
F = Non-U.S. citizen F visa (student)	Non-U.S. Citizen Temporary	F1	F1
J = Non-U.S. citizen J visa (exchange visitor)	Non-U.S. Citizen Temporary	J1	J1
O = Non-U.S. citizen, other visa	Non-U.S. Citizen Temporary	All others or blank	Any value not equal to IAR, F1 or J1 or BLANK
N = Non-U.S. citizen, undetermined status	Undocumented Alien		
R = Refugee	Refugee/Asylum		
X = Citizenship not determined	Undetermined		

3.31 Standard Industry Table

Your institution will need to set up or edit the US Standard Industry Classification (SIC) codes as required to reflect changes by the US Department of Labor. The SIC system is a series of number codes that attempts to classify all business establishments by the types of products or services they make available. Use the Standard Industry Table to set up or review the valid SIC codes required by your institution.

These codes are used to track work experience for individuals in your system.

Page Name: Standard Industry Table

Navigation: Home→ Design Student Administration → Define Campus Community → Setup → Standard Industry Table

3.31.1 Considerations

If you have implemented PeopleSoft HRMS, the Standard Industry Classification codes required by your institution should already be entered.

Will the campus track work experience information.

3.31.2 Recommendations

3.32 Search/Match Criteria

Information is entered into your Student Administration system by many different departments and operators. It is very important that as little duplicate information exists in the system as possible. Therefore as users enter information, specifically when they add new people to the system, you want them to check to make sure that the person does not already exist in your database. The Search/Match Criteria Table provides the central location for your institution to define the criteria that will be used by the system to check for duplicate or multiple entries. This criterion can be used for manual searches or those done automatically as part of a data load process.

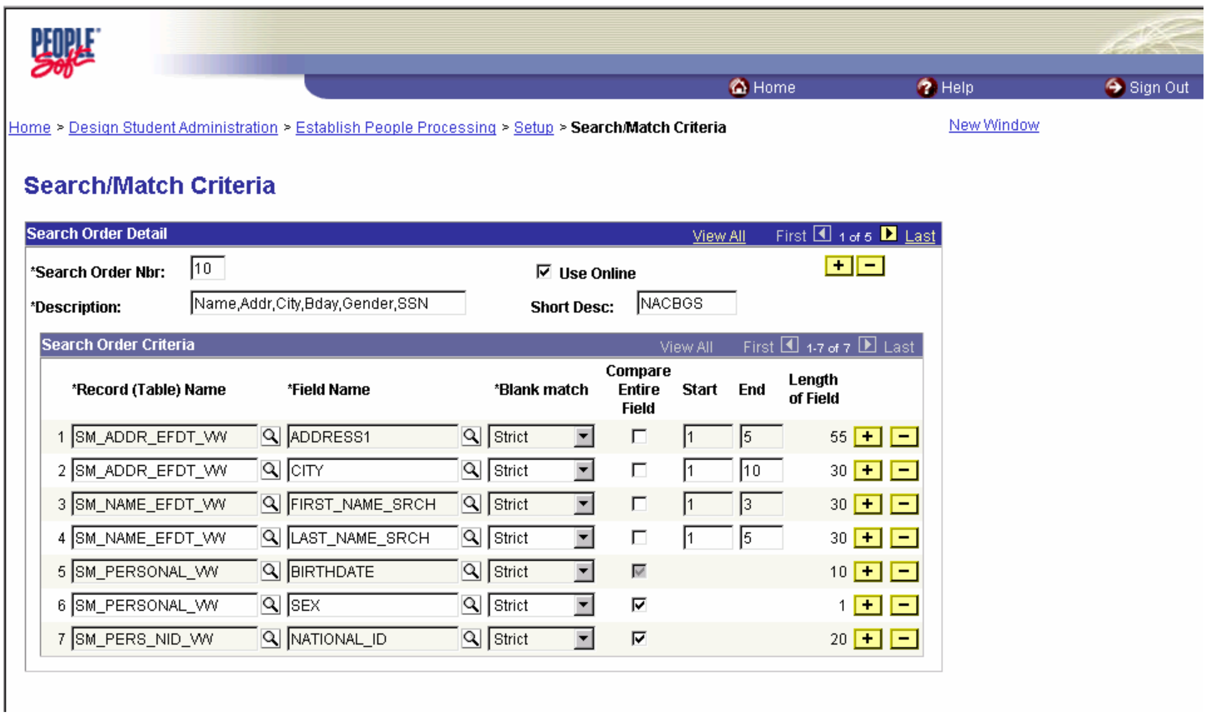
The easiest way to check for duplicate or multiple entries is to search on first and last names; however especially in a large institution, there might be several people with the same first and last name.

Therefore, the Search/Match Criteria enables you to define a number of searches that are successively less and less restrictive.

Each Search Order Nbr is defined as a search condition, which is made up of one or more search fields. Search conditions are executed in increasing search order number order (from the lowest number to the highest number). The search continues until either a potential duplicate is encountered or all search conditions are executed and no potential duplicate is encountered. A search condition is bypassed if one or more of the search fields do not contain any data.

Page Name: **Search/Match Criteria**

Navigation: **Design Student Administration → Establish People Processing → Setup → Search/Match Criteria**



Home | Help | Sign Out

Home > Design Student Administration > Establish People Processing > Setup > Search/Match Criteria   New Window

Search/Match Criteria

Search Order Detail   View All First 1 of 5 Last

*Search Order Nbr: 10   Use Online

*Description: Name,Addr,City,Bday,Gender,SSN   Short Desc: NACBGS

Search Order Criteria   View All First 1-7 of 7 Last

	*Record (Table) Name	*Field Name	*Blank match	Compare Entire Field	Start	End	Length of Field
1	SM_ADDR_EFDT_VW	ADDRESS1	Strict	☐	1	5	55
2	SM_ADDR_EFDT_VW	CITY	Strict	☐	1	10	30
3	SM_NAME_EFDT_VW	FIRST_NAME_SRCH	Strict	☐	1	3	30
4	SM_NAME_EFDT_VW	LAST_NAME_SRCH	Strict	☐	1	5	30
5	SM_PERSONAL_VW	BIRTHDATE	Strict	☑			10
6	SM_PERSONAL_VW	SEX	Strict	☑			1
7	SM_PERS_NID_VW	NATIONAL_ID	Strict	☑			20

3.32.1 Considerations

The search match criteria that are setup will be used by PeopleSoft data load processes such as ISIR load.

Modifications to Search/Match subroutine CCCSRCH.SQC are necessary in all environments when you define more than 7 field names within a Search Order Number.

The following records contain the search data:

SM_EFDT_ADDR_VW: Current address data.

SM_EFDT_NAME_VW: Current name data.

SM_HIST_ADDR_VW: Historical address data.

SM_HIST_NAME_VW: Historical name data.

SM_PERS_NID_VW: National ID data.

SM_PERSONAL_VW: Personal data.

3.32.2 Recommendations

The lowest search order number should be the most restrictive and the highest search order number should be the least restrictive.

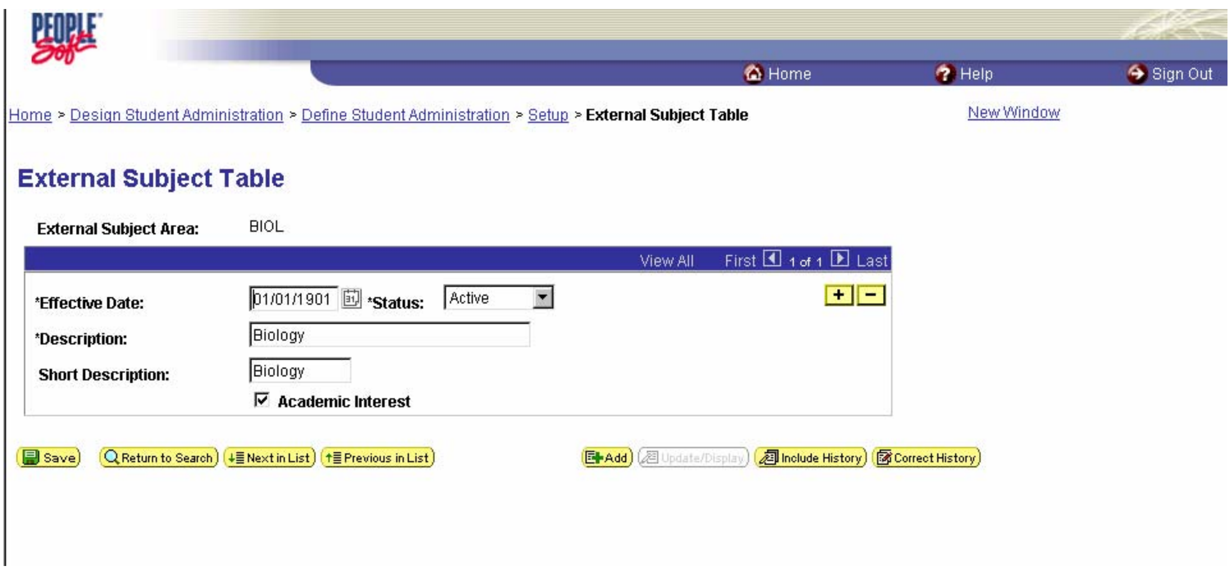
3.33 External Subject Table

External Subjects are general subject areas, which you define for the purpose of categorizing external courses. For example, let's say that one of the entrance requirements at your institution is four years of high school English. However, at different high schools they offer classes titled 17th Century English Literature, Mystery Writers of America, A Journey Through Time with Shakespeare, and Discovering Joyce. When classes such as these appear on a student's transcript they do not readily translate as English courses, so you assign them to an External Subject of English that you have created.

Use the External Subject Table to define categories of subjects found at external organizations. These subjects will then be linked to external organizations and the courses they offer. The subject area you enter on the External Subject Table can be defined further into the subjects offered at each school on the School Subject Maintenance panel.

Page Name: External Subject Table

Navigation: Home→ Design Student Administration → Define Student Administration → Setup→ External Subject Table



3.33.1 Considerations

3.33.2 Recommendations

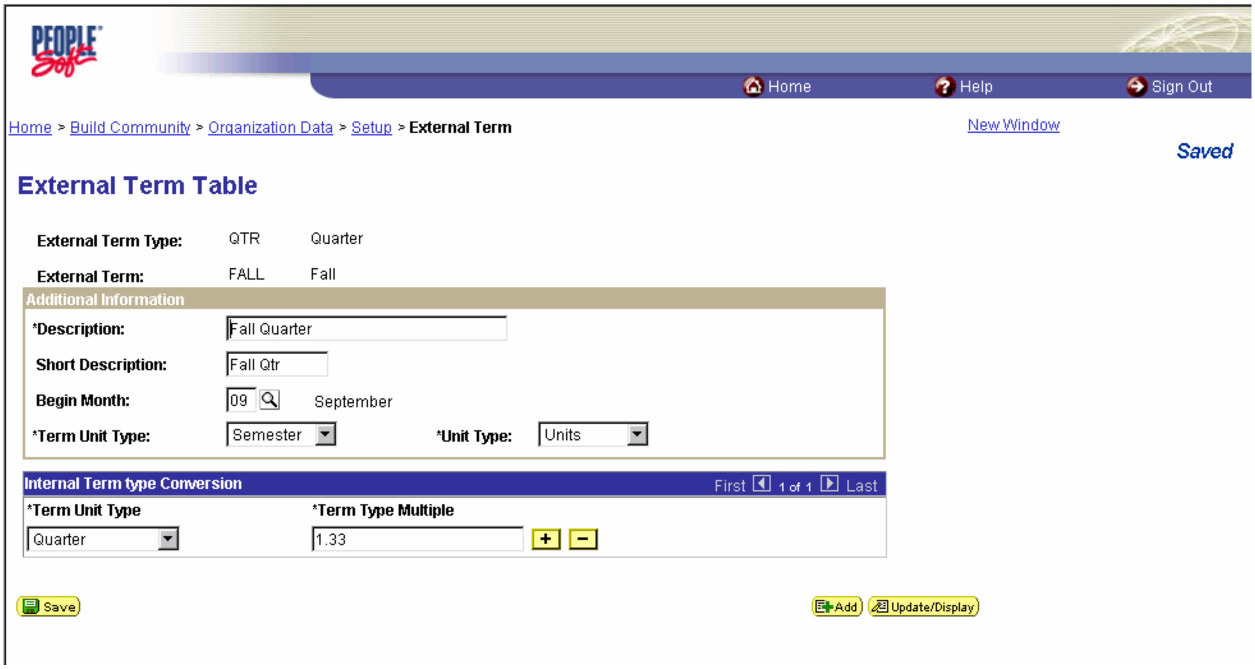
Your set-up of the External Subject Table should include the College Preparatory Subjects on the Undergraduate application.

3.34 External Term

When tracking information regarding external institutions for a prospect, applicant or student, you may want to know the specific term to which that information is related. For example, if you are entering external transcript or external transfer credit information, you want to record the term to which the transcript information pertains. Because external institutions use various term structures, you use this table to define all External Terms. You can also set up how you would want external terms converted to your term structure.

Page Name: **External Term**

Navigation: **<u>Home→ Design Student Administration → Define Student Administration → Setup→ External Term Table</u>**



3.34.1 Considerations

The Term Unit Type is the type of ***internal term*** unit that most closely correlates to this external term type.

The Unit Type is a credit or term type that further describes the correlation of this external term to your institution's term unit type.

The Term Unit Type under the Internal Term Type Conversion is the ***external term*** unit type that you want the system to convert to an equivalent of the internal term unit.

The Term Type Multiple is the factor by which the system should multiply the external term unit type to convert it to an equivalent of the specified internal term unit type.

For example, the external term unit type of ***Quarter*** multiplied by ***1.33*** is the equivalent of your internal ***Semester*** term unit type. The system provides this conversion when calculating transfer credit for a manually assigned equivalent course.

The system uses the conversion multipliers on the Unit Conversion Table page when calculating internal transfer credit (for instance, transferring between academic careers).

3.34.2 Recommendations

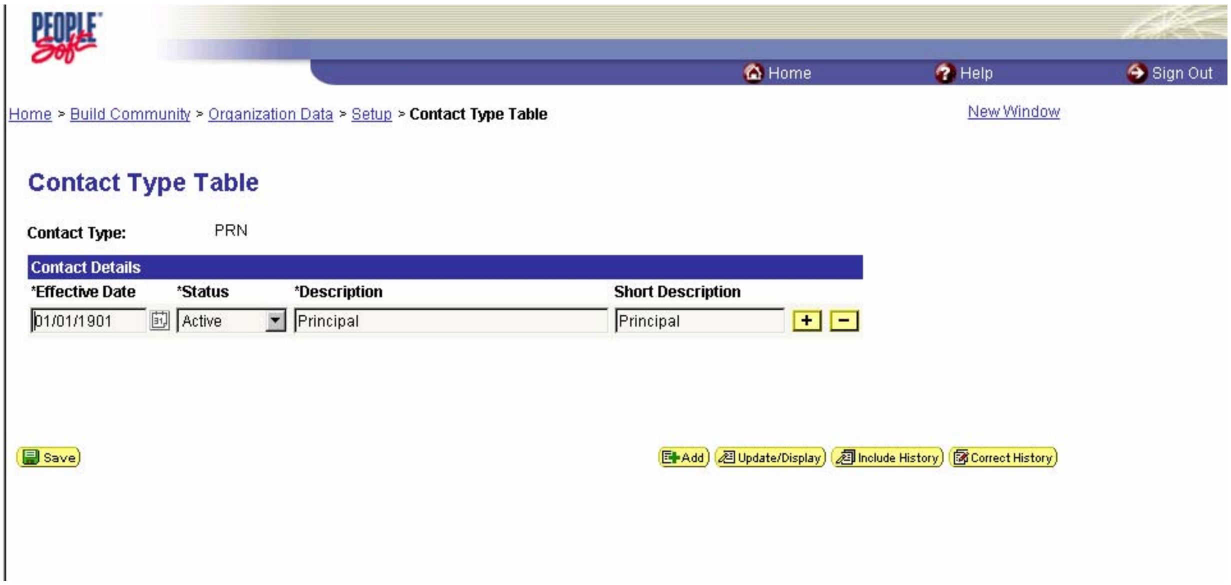
The external term table should be set-up to handle any college terms that you deal with frequently.

3.35 Contact Type Table

Use the Contact Type Table page to set up the type of contacts your institution might have with the organizations in your system. For example, at a High School you might have contact with teachers, guidance counselors, and the principal.

Page Name: Contact Type Table

Navigation: Home→ Build Community → Organization Data → Setup → Contact Type Table



3.35.1 Considerations

Many departments on campus may utilize the Contact Type Table; you may need to gather requirements from many departments on your campus.

3.35.2 Recommendations

The Contact Type Table should be set-up according to your campus specific business requirements.

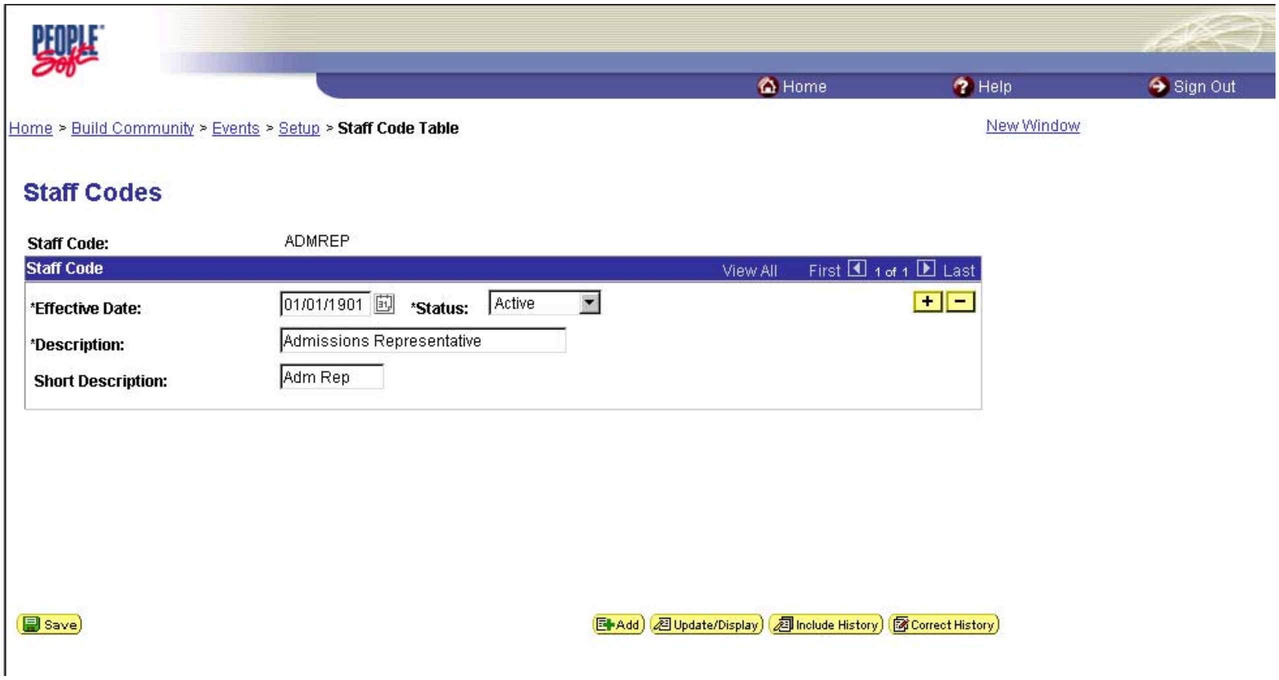
3.36 Staff Code Table

Planning an event is made up of creating the event, assigning meetings, and defining the details of those meetings including assigning specific facilities, resources, and staff. You can also create a template that can be used over and over again for recurring events.

Use the Staff Codes Table to identify any and all types of staff that may be necessary for an event. For example, speakers, admissions counselors, tour guides, cooks, servers, and so on.

Page Name: **Staff Code Table**

Navigation: **Home→ Build Community → Events → Setup → Staff Code Table**



3.36.1 Considerations

The types of events you plan to track in your system will assist you in determining what type of staff codes need to be set-up in PeopleSoft.

3.36.2 Recommendations

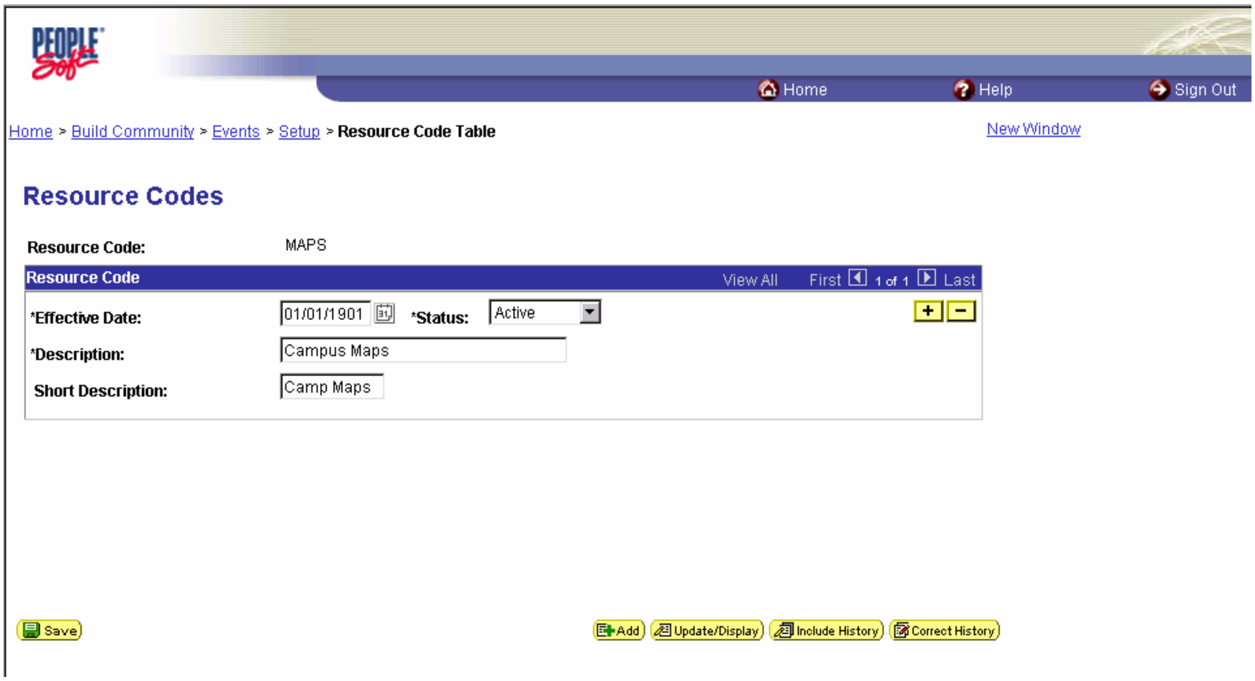
The Staff Code Table should be set-up according to your campus specific business requirements

3.37 Resource Code Table

Use the Resource Code Table to create codes for any resources that might be required during an event at your institution. For example, chairs, microphones, overhead projectors, and so on.

Page Name: Resource Cd Table

Navigation: Home→ Build Community → Events → Setup → Resource Code Table



3.37.1 Considerations

The types of events you plan to track in your system will assist you in determining what type of resource codes need to be set-up in PeopleSoft.

3.37.2 Recommendations

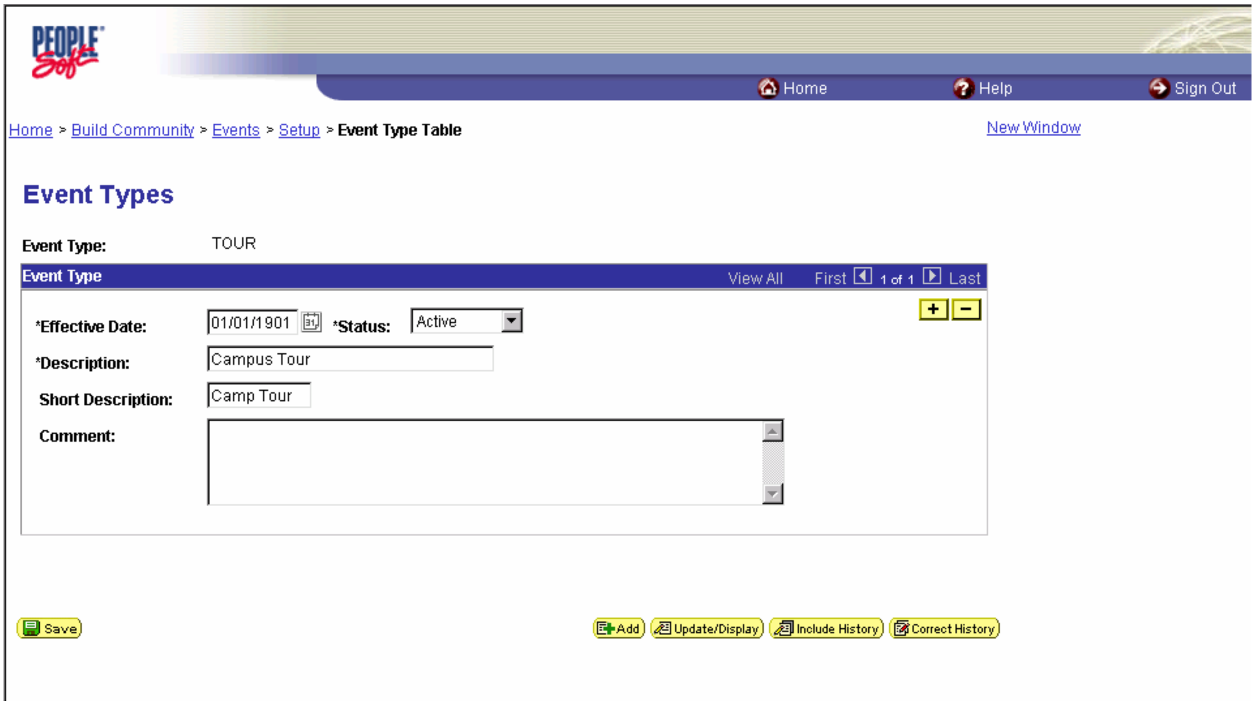
The Resource Code Table should be set-up according to your campus specific business requirements

3.38 Event Type Table

Use the Event Type Table to define the general types of events that you plan to track in PeopleSoft at your institution.

Page Name: Event Type Table

Navigation: Home→ Build Community → Events → Setup → Event Type Table



3.38.1 Considerations

The Plan Event functionality may be used be many departments on campus. You may need to collect requirements from many departments on your campus.

3.38.2 Recommendations

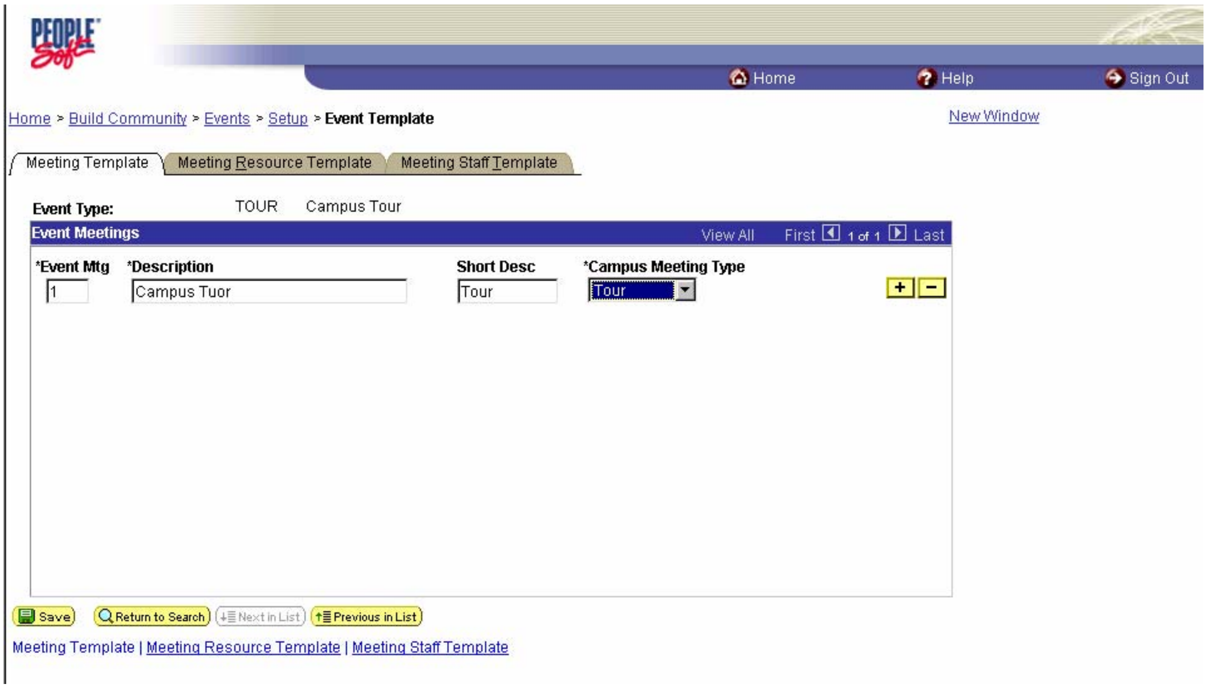
The Event Type Table should be set-up according to your campus specific business requirements

3.39 Event Template

Planning an event is made up of creating the event, assigning meetings, and defining the details of those meetings including assigning specific facilities, resources, and staff. You can also create a template that can be used over and over again for recurring events.

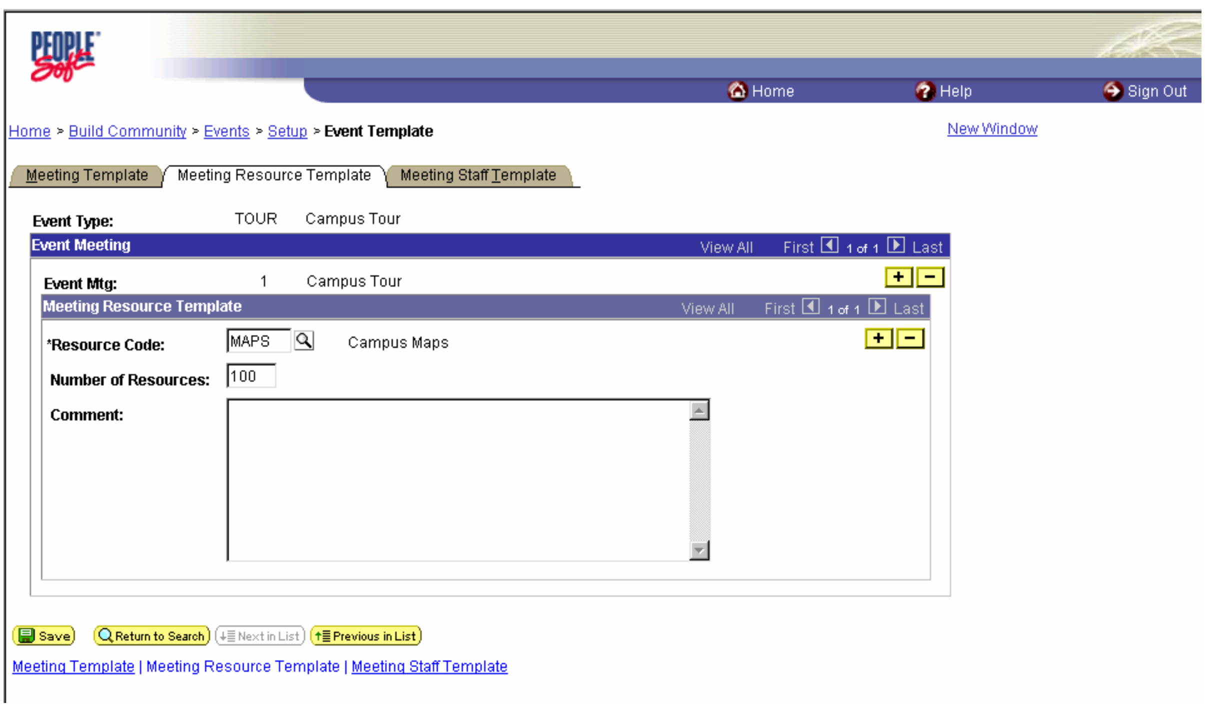
Page Name: **Meeting Template**

Navigation: **Home→ Build Community → Events → Setup → Event Template → Meeting Template**



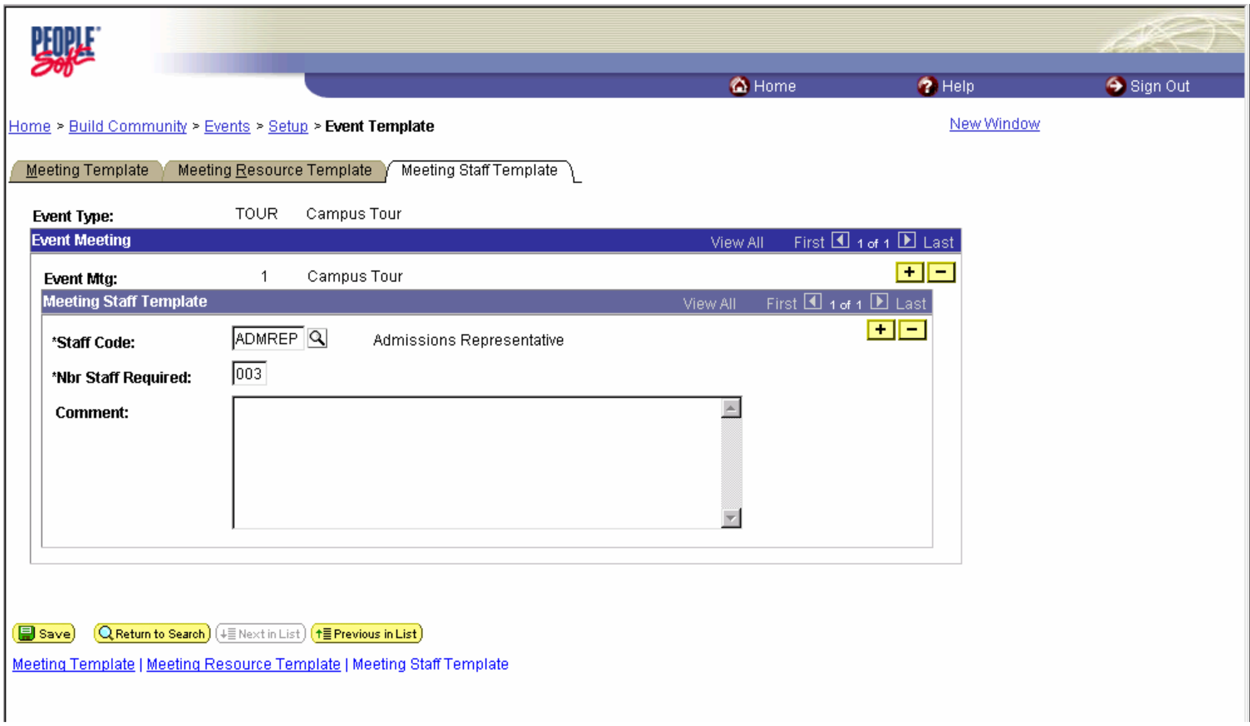
Page Name: **Meeting Resource Template**

Navigation: **Home→ Build Community → Events → Setup → Event Template → Meeting Resource Template**



Page Name: Meeting Staff Template

Navigation: Home→ Build Community → Events → Setup → Event Template → Meeting Staff Template



3.39.1 Considerations

Before you can create an event template in your system, you need to define the types of events, staff, and resources that may be required.

3.39.2 Recommendations

The Event Template should be set-up according to your campus specific business requirements

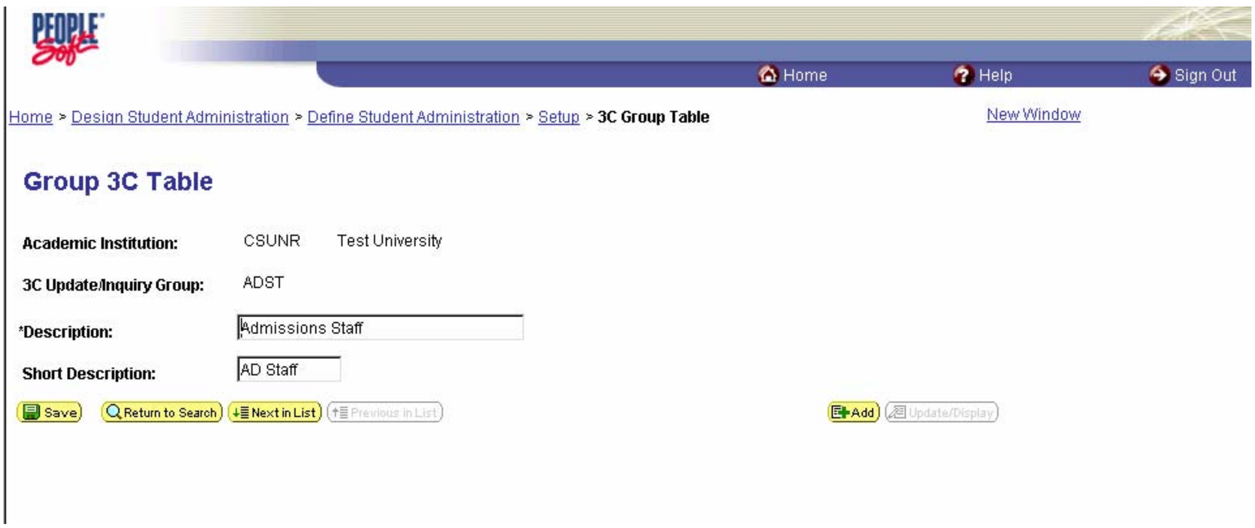
Section 4 Comments, Checklists And Communications Tables (3C's)

4.1 3C Groups

Use 3C groups to define which users have which type of access to specific Communication Categories, Checklist Codes, and Comment Categories. 3C Groups enable you to assign data entry or viewing only privileges across functions. Use will use the 3C Group Security page to assign 3C Groups to specific Operator IDs.

Page Name: 3C Group Table

Navigation: **Home→ Design Student Administration → Define Student Administration → Setup→ 3C Group Table**



4.1.1 Considerations

In order to setup the 3C Groups the campus needs to determine which departments and staff will utilize the 3Cs. Once you have determined which departments will use the 3Cs, similar grouping of employees should be determined and a 3C group should be created.

4.1.2 Recommendations

The 3C Groups should be set-up according to your campus specific business requirements

4.2 Standard Letter Codes

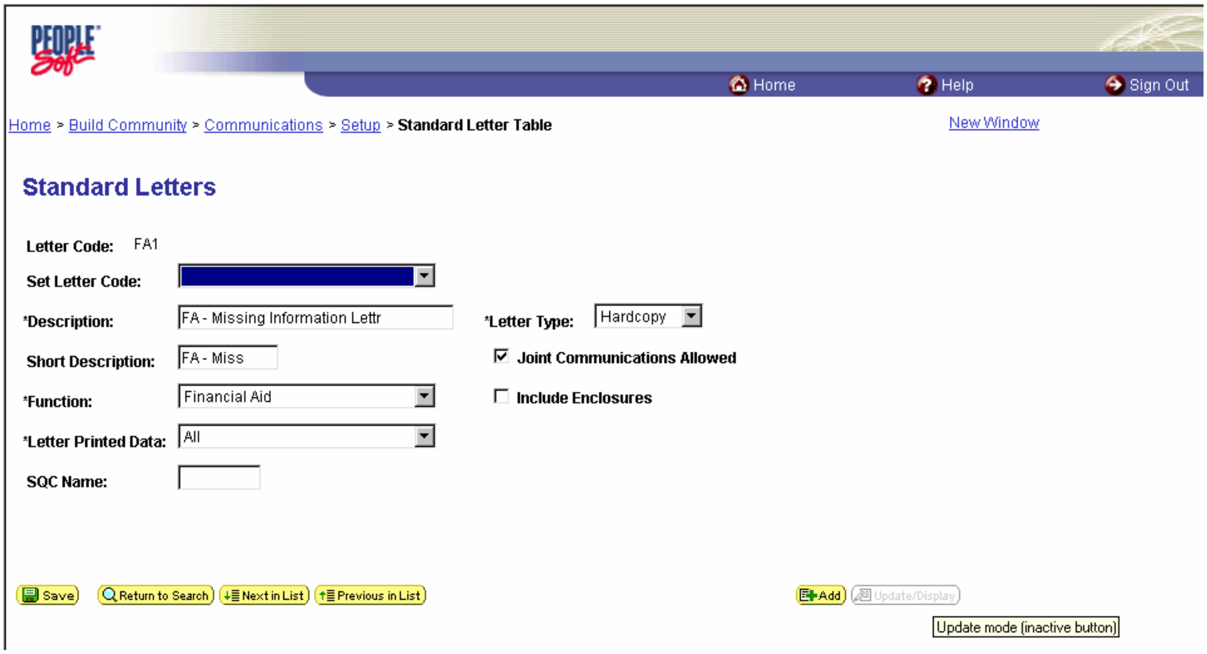
Operators can assign communications to individuals, to organizations, and to groups of individuals. To assign communications, operators must be able to select the categories, contexts, methods, directions, and letter codes for the specific communications. In other words, they must be able to select the who, what, when, and how of each communication. Here's how they correlate in Student Administration:

Category	=	Why
Context	=	What
Method	=	How
Direction	=	Where
Date	=	When
ID	=	Who

Standard letter codes enable you to link system-generated letter data to your Microsoft Word or JetForm letter templates for the purpose of generating letters.

Page Name: Standard Letter Table

Navigation: Home→ Build Community → Communications → Setup → Standard Letter Table



4.2.1 Considerations

The 3 character LETTER_CD field is only 3 characters long, careful planning will need to occur so you do not run our of letter codes. The Letter Code can consist of letter and numbers.

During the Campus Community Prototype sessions it was agreed that a standard naming convention would be used. The naming convention was determined to be: A##, where A identifies the owner of the letter and ## is the letter or number assigned by the owner.

It was also recommended that HR use the same naming convention and use the standard sequence of H## for HR standard letters.

The Set Letter Code category (***Admit Letters, Inquiry Response Letters, Recruitment Letters,*** and so on) is what best describes the group of letters that includes this letter code. ***This field is optional*** and for information only.

4.2.2 Recommendations

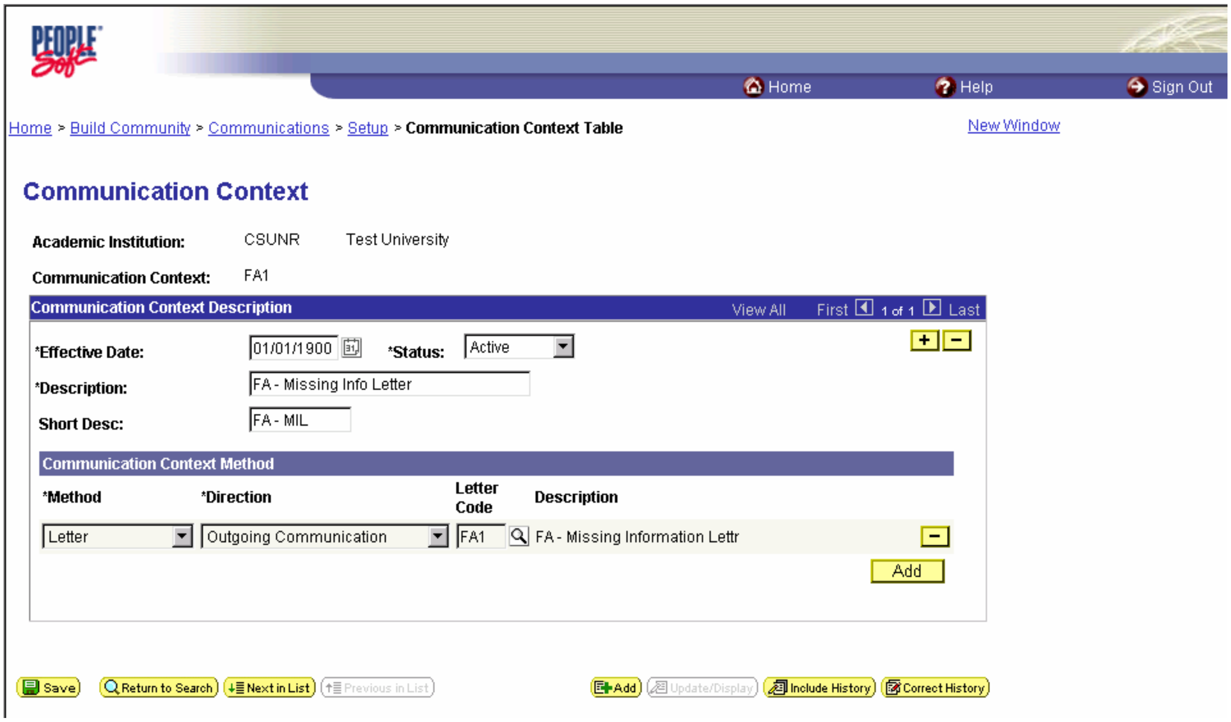
The Standard Letter Table should be set-up according to the Campus Community Prototype Team recommendations.

4.3 Communication Context Table

A communication context is a specific instance of communication that indicates what kind of communication was sent or received and how it was sent or received. Communication Contexts are then grouped into Communication Categories. You can specify more than one method of communication for each context you create. For example, if students can contact your institution by letter, email, or phone to confirm admission acceptance you might want to create an Admissions Acceptance communication context that includes all three methods.

Page Name: Communication Context Table

Navigation: Home→ Build Community → Communications → Setup → Communication Context Table



4.3.1 Considerations

The Communication Context Code can be up to 6 characters long. Consideration should be given to starting the code with the same name as the Standard Letter Table.

4.3.2 Recommendations

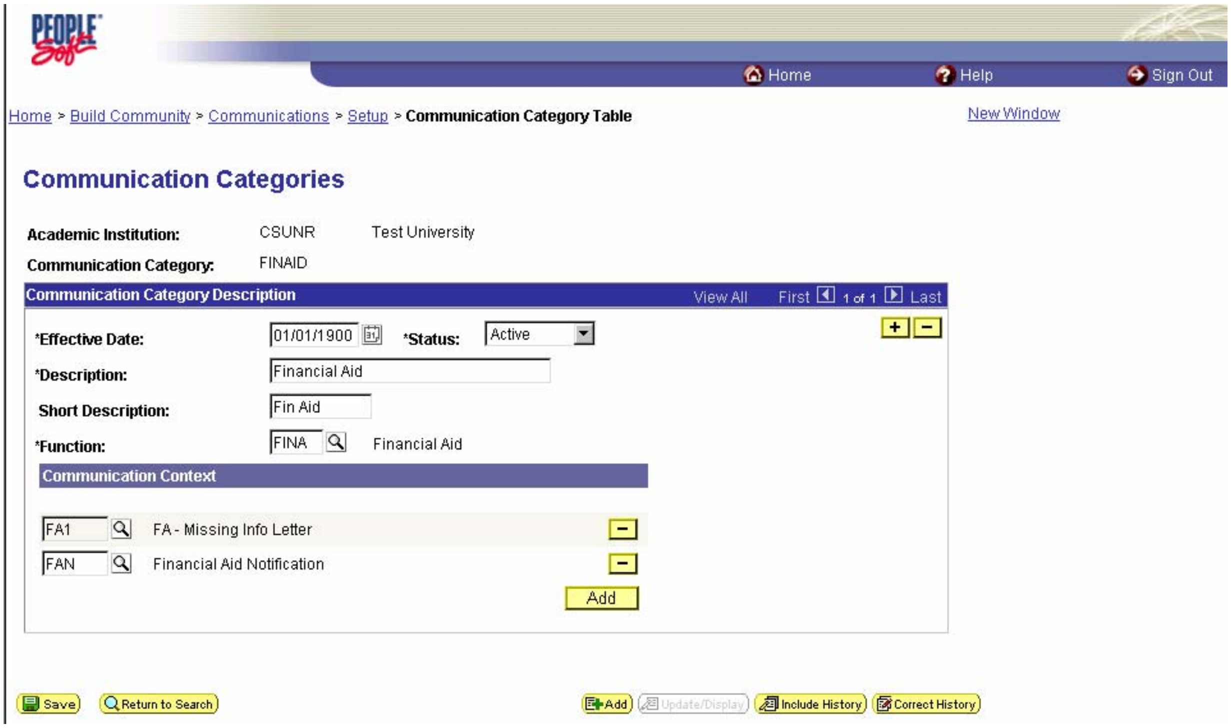
The Communication Context Table should be set-up according to your campus specific business requirements

4.4 Communication Category Table

A communication category is a broad grouping of communication contexts that generally indicates why a communication was sent or received. For example, you might create a communication category called Admissions that includes the following communication contexts: application received, admission acceptance, admission decline, admission deferral, frosh admit, frosh deny, and so on, or you might decide to create much more detailed communication categories such as Frosh Recruit, Frosh Admission, Graduate Recruit, and Graduate Admission.

Page Name: **Communication Category Table**

Navigation: **<u>Home→ Build Community → Communications → Setup → Communication Category Table</u>**



4.4.1 Considerations

Communication categories are assigned to Communication 3C Groups for the purpose of limiting access to the communications associated with those categories. Therefore, you may want to make your communication categories fairly specific so that you have more flexibility to determine which users will have access to which communications.

4.4.2 Recommendations

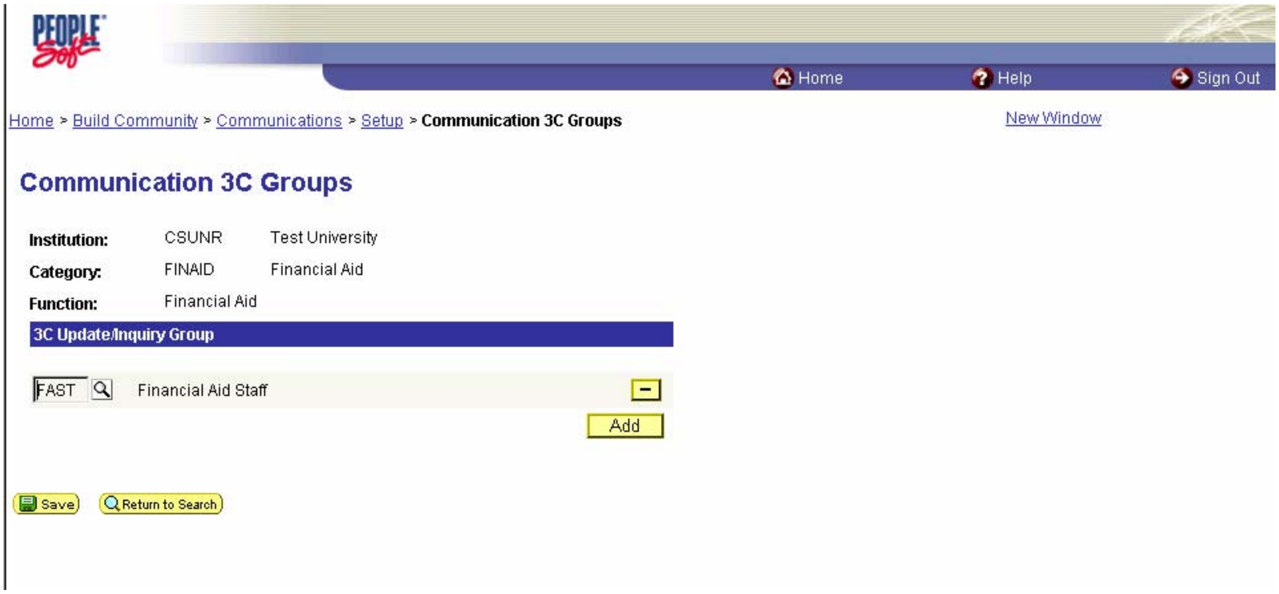
The Communication Category Table should be set-up according to your campus specific business requirements

4.5 Communication 3C Groups

Use 3C groups to define which users have which type of access to specific Communication Categories, Checklist Codes, and Comment Categories. 3C Groups enable you to assign data entry or viewing only privileges across functions. Use the 3C Group Security page to assign 3C Groups to specific Operator IDs.

Page Name: **Communication 3C Groups**

Navigation: **Home→ Build Community → Communications → Setup → Communication 3C Groups**



4.5.1 Considerations

Each major department will need to determine who should have access to review communications. You may also need to determine if employees of other departments may need to view the history of communications sent.

4.5.2 Recommendations

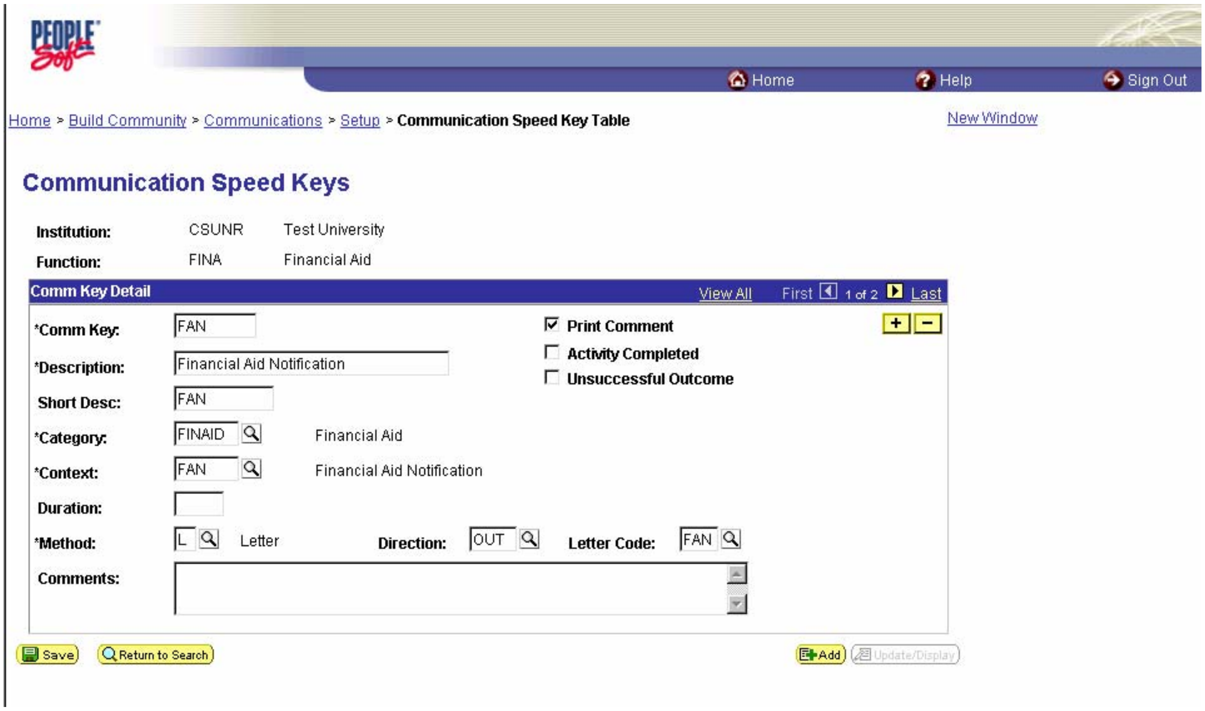
The Communication Category Table should be set-up according to your campus specific business requirements

4.6 Communication Comm Key Table

Communication Keys enable you to create a shorthand method of specifying common communication data. With the five controls in place—Communication Category, Communication Context, Communication Method, Communication Direction, and Standard Letter Code—you can set up Communication Keys to combine these controls with a number of defaults into one shortcut page control.

Page Name: **Communication Comm Key Table**

Navigation: **Home→Build Community → Communications → Setup → Communication Comm Key Table**



4.6.1 Considerations

4.6.2 Recommendations

The Communication Category Table should be set-up according to your campus specific business requirements

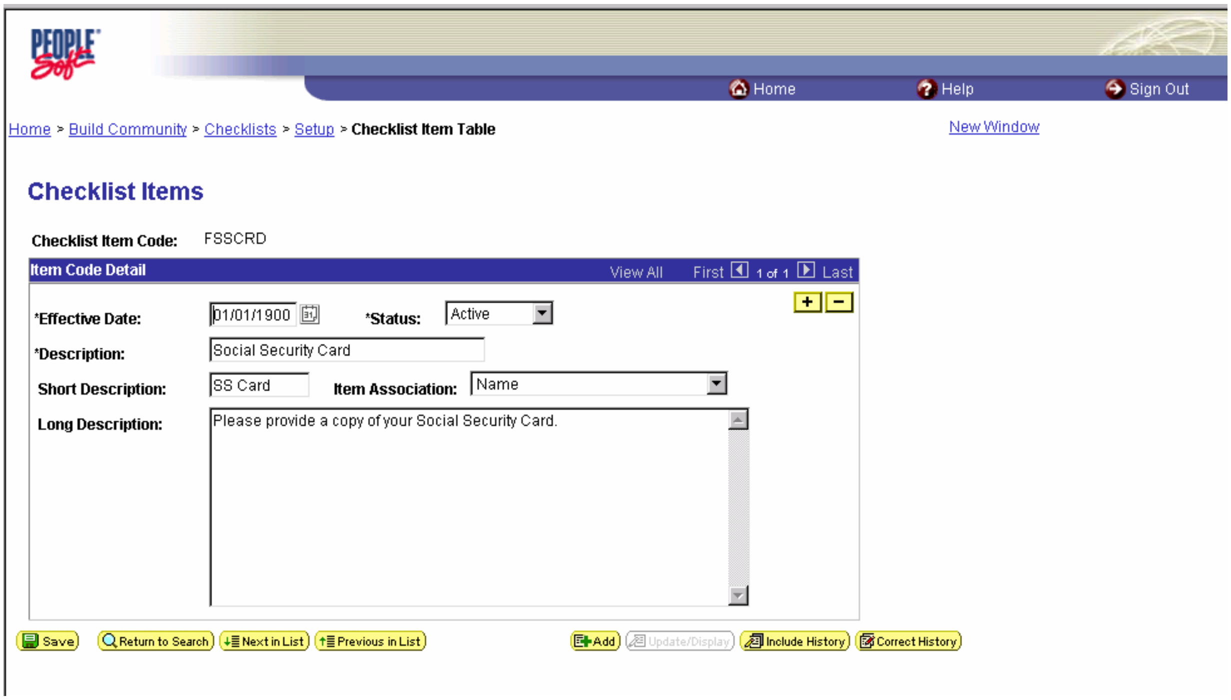
4.7 Checklist Item Table

Checklist Management is a tool that enables you to track applications, organize recruitment mailings, assign tasks to staff members, generate a series of communication items, and much more. You can assign Checklists to events, organizations, individuals, and groups of individuals. You can also use tracking groups to monitor groups of checklists.

To create checklists, you specify checklist items in the Checklist Item Table, and then use those items to set up standard checklists in the Checklist Table. You can use the standard checklists as is or as the basis for creating custom checklists for specific purposes. One Checklist can have multiple Checklist Items related to it. Each of these items can be assigned a responsible person, a status, and a due date. The Checklist itself also has an overall due date.

Page Name: Checklist Item Table

Navigation: Home→ Build Community → Checklists → Setup → Checklist Item Table



4.7.1 Considerations

Before you use checklists, you need to do some thoughtful preparation in order to use their full functionality. For example, before designing your checklist structure, you will need to analyze your functional and institutional needs for using checklists. The following outlines some preliminary steps to perform prior to using checklists.

- Review the use of Administrative Functions and Checklist 3C Groups and make sure they are set up properly.
- Identify all the types of Checklists that you will be using.
- Identify all the items that will be tracked with Checklists.
- Identify the Tracking Groups with which you want checklists associated.

The following are some of the types of Checklists you can use:

Requirement List A list of items that a student must accomplish or submit in order to move on to the next step of a process. For example, a list of all the materials required to complete an application to your institution. Items from a requirements list can also be used in the letter generation process to notify students of their missing application items.

Communication List A list of the communications (letters, brochures, phone calls) that have occurred with a person over a period of time.

Staff Assignment List A list of items that a staff member needs to accomplish relative to a particular student.

Promise List Records the amount and due dates of a person's promise-to-pay.

The CHKLST_ITEM_CD field is only 6 characters long, careful planning will need to occur so you do not run our of letter codes. The Letter Code can consist of letter and numbers.

During the Campus Community Prototype sessions it was agreed that a standard naming convention would be used. The naming convention was determined to be: A##, where A identifies the owner of the items and ## is the letter or number assigned by the owner.

4.7.2 Recommendations

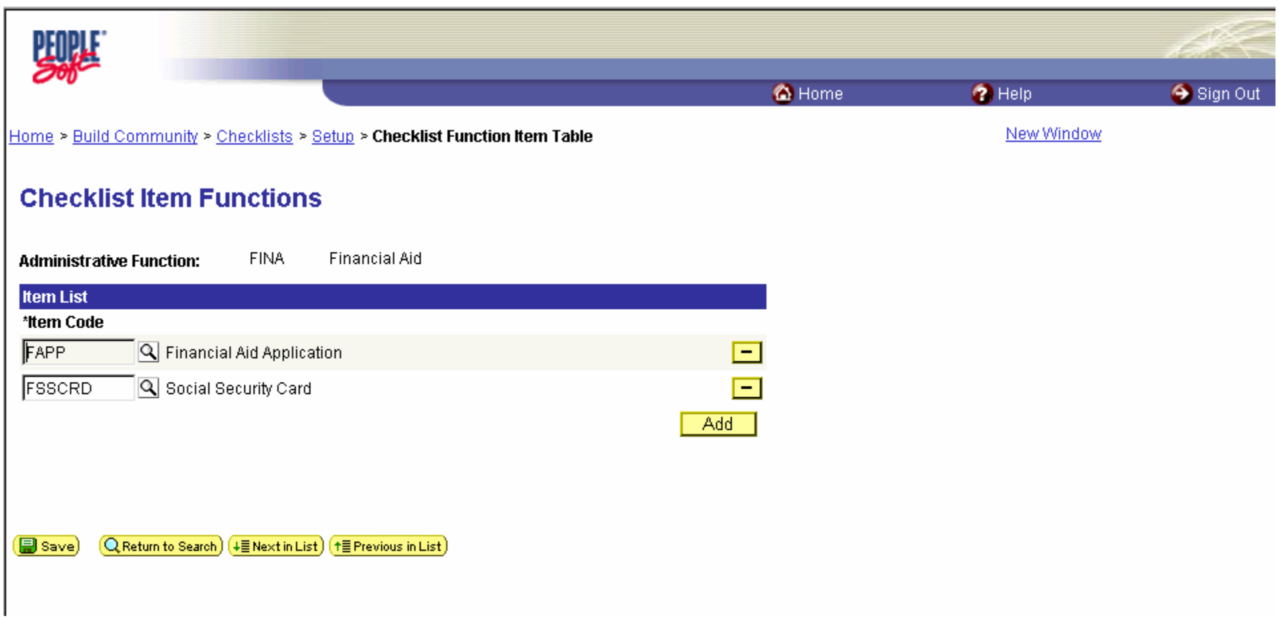
The Checklist Item Table should be set-up according to your campus specific business requirements.

4.8 Checklist Function Item Table

The Checklist Function Item Table enables you to associate Checklist Items with Administrative Functions for prompting on variable data.

Page Name: Checklist Function Item Table

Navigation: Home→ Build Community → Checklists → Setup → Checklist Function Item Table



4.8.1 Considerations

Make sure that you are very thorough when associating Checklist Items with Administrative Functions as operators creating checklists will be limited to those Checklist Items that have been associated with the Administrative Function of that particular Checklist.

A Checklist Item can be associated with more than one Administrative Function.

4.8.2 Recommendations

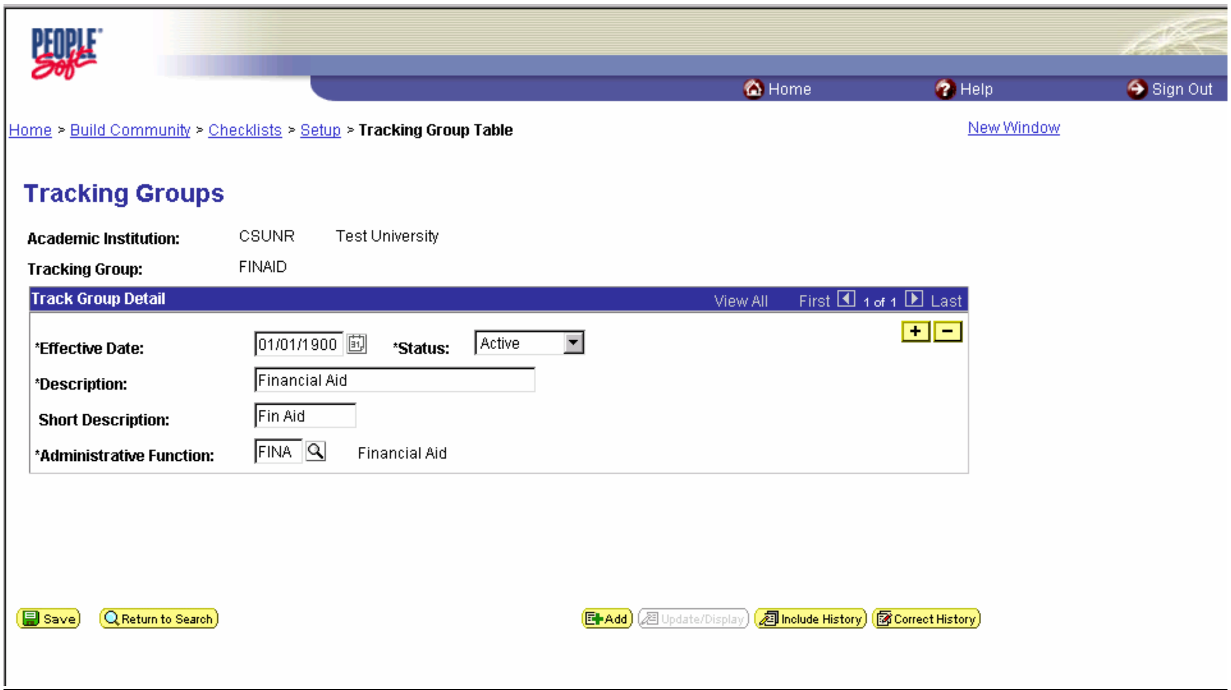
The Checklist Function Item Table should be set-up according to your campus specific business requirements.

4.9 Tracking Group Table

Tracking Groups are used to combine several checklists with the same Administrative Function into one monitoring unit. Tracking Groups provide a logical connection between the checklists attached to an individual. For example, you may have several checklists for the same student in the undergraduate applications function, but only some of those checklists are related to the student's loan requirements. Let's say you want to monitor the status of this student's loan documents to determine when his loan document requirements are complete. When you create the checklist and assign a Checklist Code, you would also assign each of the desired checklists to a loan documents Tracking Group code. This enables you to inquire against a group of checklists, rather than one at a time or according to Administrative Function.

Page Name: Tracking Group Table

Navigation: Home→ Build Community → Checklists → Setup → Tracking Group Table



4.9.1 Considerations

Be careful how broad you make the tracking groups because operators can only assign one tracking group per checklist.

4.9.2 Recommendations

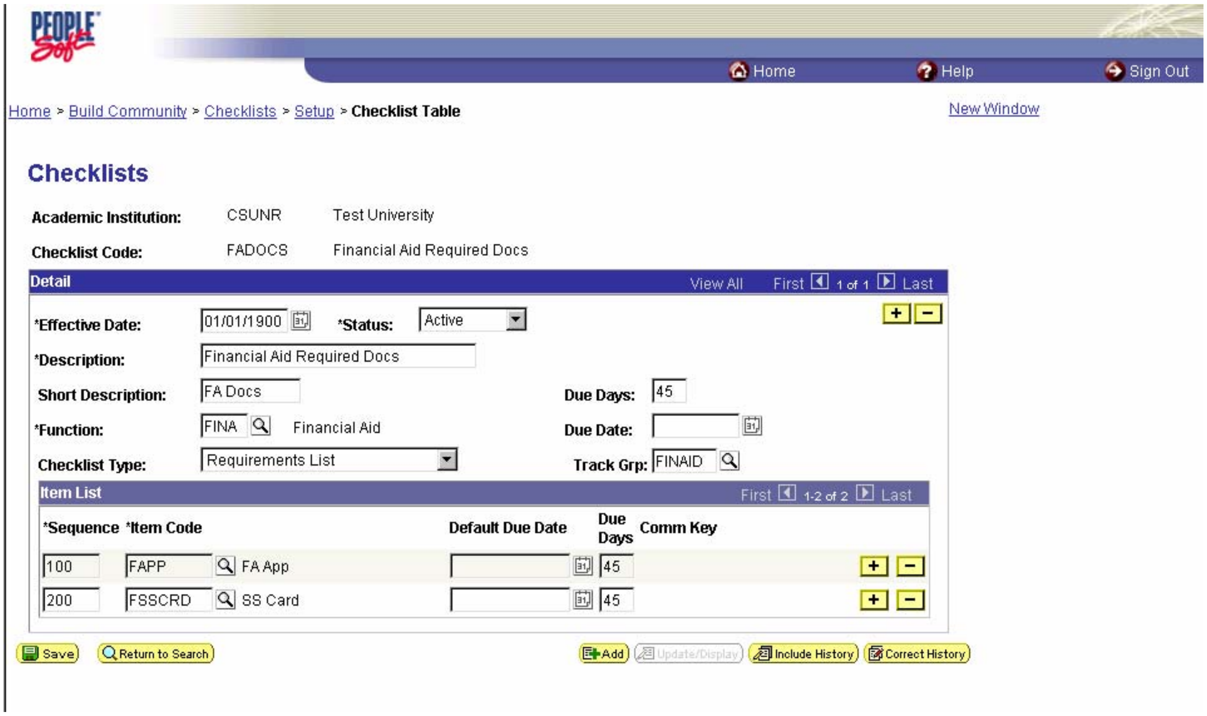
The Tracking Group Table should be set-up according to your campus specific business requirements.

4.10 Checklist Table

Checklist Codes are essentially checklist templates. When you create a Checklist Code you assign Checklist Items to it. When you assign a checklist and enter a Checklist Code, the Checklist Items associated with that code are automatically assigned. You can then assign additional Checklist Items.

Page Name: Checklist Table

Navigation: Home→ Build Community → Checklists → Setup → Checklist Table



4.10.1 Considerations

You may enter either Due Days or a specific Due Date. If you enter both Due Days and a Due Date, the due date is calculated to be the sooner of the two.

4.10.2 Recommendations

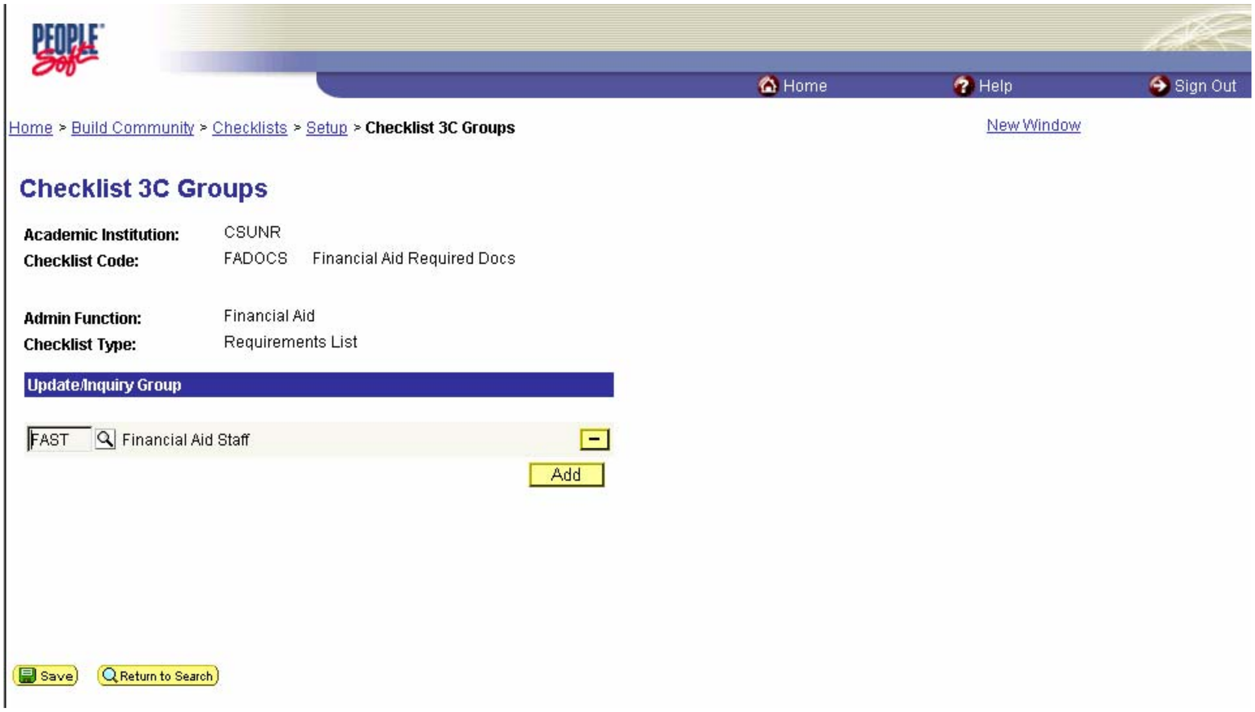
The Checklist Item Table should be set-up according to your campus specific business requirements.

4.11 Checklist 3C Groups

After you have set up checklists, you will need to set up the checklist 3C Groups your institution will use to grant security access to those checklists in your database. Operators can access only the checklists associated with a checklist category to which they have been granted access by way of a Checklist 3C Group.

Page Name: Checklist 3C Groups

Navigation: Home→ Build Community → Checklists → Setup → Checklist 3C Groups



4.11.1 Considerations

4.11.2 Recommendations

The Checklist 3C Groups should be set-up according to your campus specific business requirements.

4.12 Comment Category Table

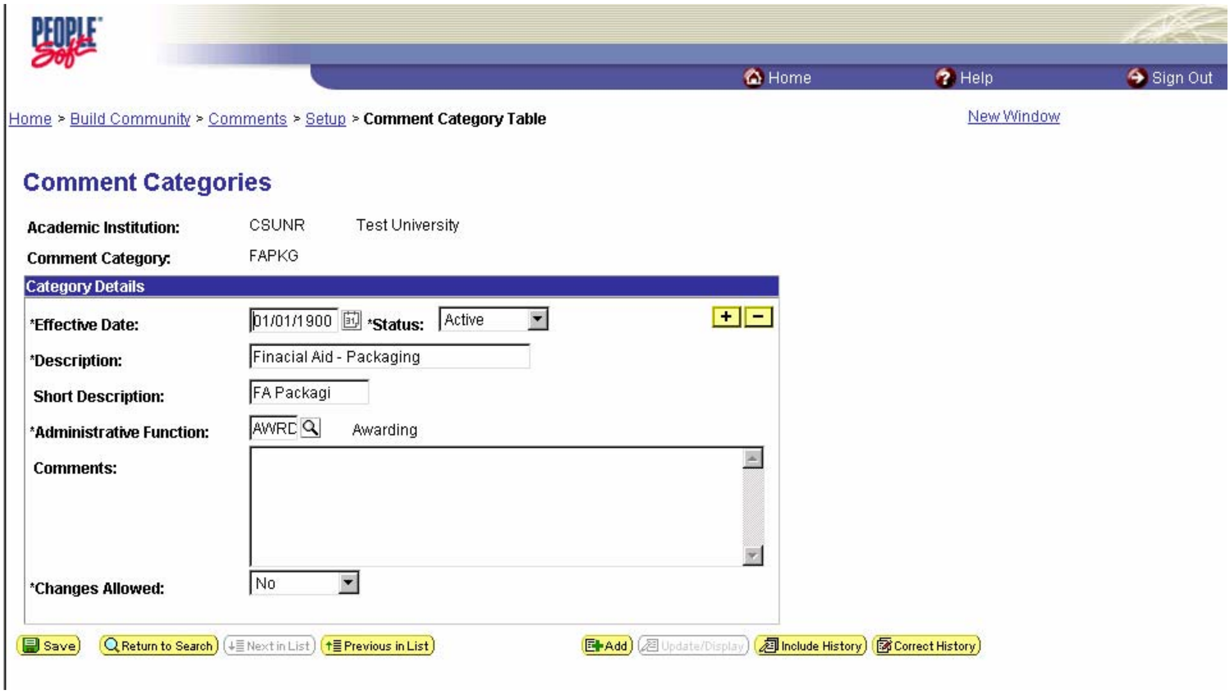
The Creating Comments function in PeopleSoft Student Administration enables you to maintain comments about people in your database and link those comments back to a certain Administrative Function and process. All Comments are stored in one central table. Using Comments 3C Groups you can assign inquiry or update access to Comment Categories. This section outlines how to create comments online.

Creating comments requires some preparation in order to use its full functionality. Before designing your comments structure, you need to analyze your functional area and institutional needs for entering and tracking comments. You also need to review the use of Administrative Functions and Comment 3C Groups and make sure that they are set up properly.

Before your users can create Comments you must set up comment categories and assign access to those categories using Comments 3C Groups.

Page Name: Comment Category Table

Navigation: Home→ Build Community → Comments → Setup → Comment Category Table



4.12.1 Considerations

Select the Changes Allowed option that you want to enable users to make changes to comments associated with this category. If you select Yes, comments associated with this category will be able to be changed or edited without limits. If you select No, comments associated with this category will not be able to be changed or edited after they have been entered. If you select Append, comments can continue to be added to those already associated with this category, but they cannot be edited after they are entered and saved.

Any information entered in the PeopleSoft system regarding a student is subject to review by the student and subject to subpoena in a lawsuit. A campus policy must be in place to determine what information will be captured in the Comments area.

4.12.2 Recommendations

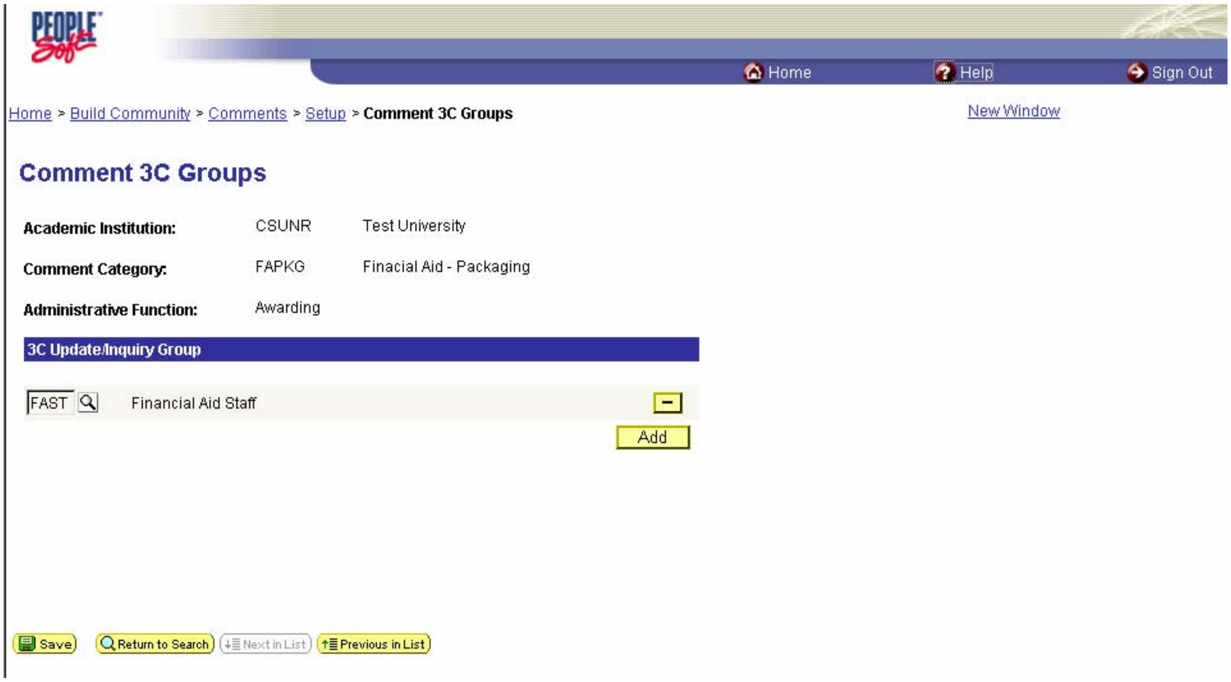
The Comment Category Table should be set-up according to your campus specific business requirements

4.13 Comment 3C Groups

Once a Comment Category is created, you must link it to those Comment 3C Groups that have an interest in viewing or updating the comments that will fall within this category. Users can only access those comments associated with a comment category to which they have been granted access by way of Comment 3C Groups. Comment 3C Groups are created in the Comment 3C Groups Table panel.

Page Name: **Comment 3C Groups**

Navigation: **Home→ Build Community → Comments → Setup → Comment 3C Groups**



4.13.1 Considerations

Users can access only those comments associated with the comment category to which you grant them access by way of comment 3C groups on the 3C Groups page.

4.13.2 Recommendations

The Comment 3C Groups should be set-up according to your campus specific business requirements.