Personal Portfolio

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REVISION CONTROL

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Table of Contents

Page

Overview

The PeopleSoft Personal Portfolio Collaborative Application exposes familiar PeopleSoft Campus Community information to self-service users. Personal Portfolio provides an easy way for self-service users to update basic personal information about themselves at any time without having to visit your offices or complete and mail a hardcopy form.

Section 1   Type Control

To set up Personal Portfolio, assign levels of control to the types of personal data (names, addresses, phones, and email addresses) that you want to expose to self-services users. For example, if you want to make phone numbers available to self-service users and permit them to edit or delete the phone numbers, but you do not want them to be able to delete the *Home* phone type, select *Home* for the phone type and *Edit — No Delete* for the control type.

1.1   Type Control

Navigation: Design Student Administration, Define Campus Community, Setup, Type Control

1.1.1   Considerations

Important! You must set type control levels for the Primary name type and for the Home and Mailing address types (the address types designated on your institution's Installation SA Options page). These types are required for the maintenance of personal data in your database. They are delivered with the Edit — No Delete type control level. You can apply the more restrictive type controls of either Display Only or Do Not Display, but you cannot apply the lesser restrictive control of Full Edit.

1.1.2   Recommendations

1.1.3   Decisions

Self Service access will be granted to the Mail and Permanent Address Types.

Self Service access will be granted to the Home, Cell and Business Phone Types.

Self Service access will be granted to the Home and Business Email Types.

Section 2 Bio/Demo Data Information

Self-service Bio/Demographic data is exposed under Contact Information and Demographic Information on the Peoplesoft Personal Portfolio home page. The links in these sections of the home page enable self-service users to assume responsibility for maintaining their own name, address, telephone, electronic address, and emergency contact information. The pages described here are the self-service pages that appear when users click those links.

2.1 Bio/Demo Data Information

Navigation: SA Self Service, Personal Portfolio, Tasks, Names

2.1.1 Considerations

Change (type) name	Self-service users click this link to access the Change Name Page, where they can edit or update a name type and the associated name data for themselves.
Delete (type) name	Self-service users click this link to access the Delete Name Page, where they can delete a name type and the associated name data for themselves.
Add a new name	Self-service users click this link to access the Add Name Page, where they can add a name type and the associated name data for themselves.

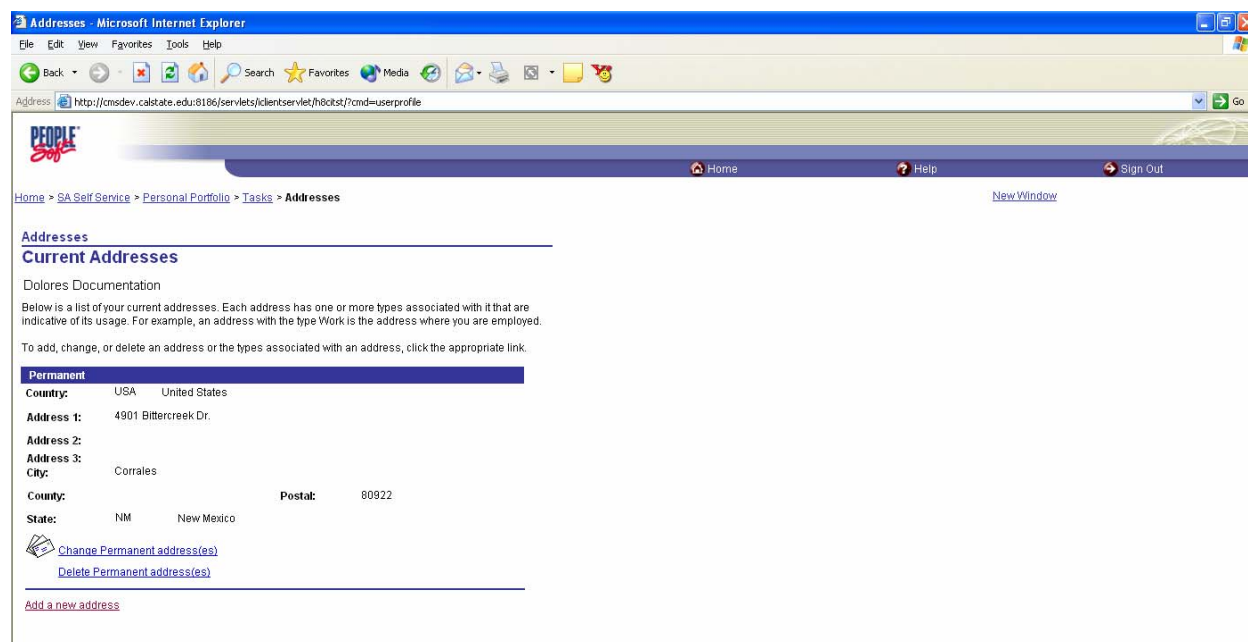### 2.1.2 Recommendations

2.1.3 Decisions

Students will only have access to view their names.

Section 3   Current Address Page

Self-service users use the Current Addresses page to view their current address types and names data.

3.1   Current Address Page

Navigation: <u>**SA Self Service, Personal Portfolio, Tasks, Addresses**</u>

3.1.1   Considerations

Change (type) address(es)	Self-service users click this link to access the Change Address Page, where they can edit or update address data, of the specified type, for themselves.
Delete (type) address(es)	Self-service users click this link to access the Delete Address Page, where they can delete address data, of the specified type, for themselves. The system maintains the old address type and associated data in history for administrative review. However, to the self-service user, the address type and data is deleted.

Note: You cannot set type control to Full Edit for the two address types that map to PERSONAL_DATA. These address types are set on the Installation Table component (Define Business Rules, Define General Options, Use, Installation Table, SA Options), and the delivered settings are Home and Mailing. Self-services users can change data for these address types, they

cannot delete the type. Therefore the Delete (Home) address(es) and Delete (Mailing) address(es) links are never available on the Current Addresses page. If you modify these mapping types on the Installation Table, you must also modify the type control settings on the Type Control page.

Add a new address	Self-service users click this link to access the Add Address Page, where they can add they can add address and associate types with that address for themselves.
Change a future address	Self-service users click this link to access the Future Addresses Page, where they can change a future-dated address and associate types with that address data for themselves.

3.1.2   Recommendation

Section 4 Phone Numbers

Self-service users use the Phone Numbers page to view their current phone types and phone numbers.

4.1 Phone Numbers

Navigation: <u>**SA Self Service, Personal Portfolio, Tasks, Phones**</u>

4.1.1 Considerations

Preferred
Self-service users select the check box to indicate the phone number to call first when trying to contact them. An individual can have only one preferred phone type.

Delete
Self-service users click this button to delete the specified phone type and associated data.

Add a Phone Number
Self-service users click this button to add a row to select an additional phone type for themselves.

4.1.2 Recommendations

Section 5 Email Addresses

Self-service users use the Email Addresses page to view their current email address types and email addresses.

5.1 Financial Aid Item Type 1

Navigation: **SA Self Service, Personal Portfolio, Tasks, Email Addresses**

5.1.1 Considerations

Preferred
Self-service users select the check box to indicate the email address to use first when trying to contact them. An individual can have only one preferred email type.

Delete
Self-service users click this button to delete the specified email type and associated data.

Add an Email Address
Self-service users click this button to add a row to select an additional email type for themselves.

5.1.2 Recommendations

5.2 Internet Address Page

Self-service users use the Internet Addresses page to view, add, change, or delete their own internet addresses, including website and FTP site addresses.

Navigation: SA Self Service, Personal Portfolio, Tasks, Internet Addresses

5.2.1 Considerations

Delete	Self-service users click this button to delete the specified internet address type and associated data.
Add an Internet Address	Self-service users click this button to add a row to select an additional internet address type for themselves.

5.2.2 Recommendations

Note: At this time security will not be given to the Internet Addresses page.

Section 6   Emergency Contact List Page

Self-service users use the Emergency Contacts List page to view, add, change, or delete the name, address, and phone numbers for their own emergency contacts.

6.1   Emergency Contact List Page

Navigation: SA Self Service, Personal Portfolio, Tasks, Emergency Contacts

6.1.1   Considerations

(Contact Name)	Self-service users click the contact name link to access the Emergency Contact Detail Page, where they can review contact information for that person.
Edit	Self-service users click the contact name link to access the Emergency Contact Detail Page, where they can correct or update contact information for that person.
Delete	Self-service users click this button to delete the specified contact person.
Add an Emergency Contact	Self-service users click this button to access the Emergency Contact Detail Page, where they can add an emergency contact and enter contact information for that person.
Change the primary contact	Self-service users click this link to access the Change Primary Contact Page, where they can select a different primary contact person.

6.1.2   Recommendations

Note: At this time security will not be given to the Emergency Contacts page.
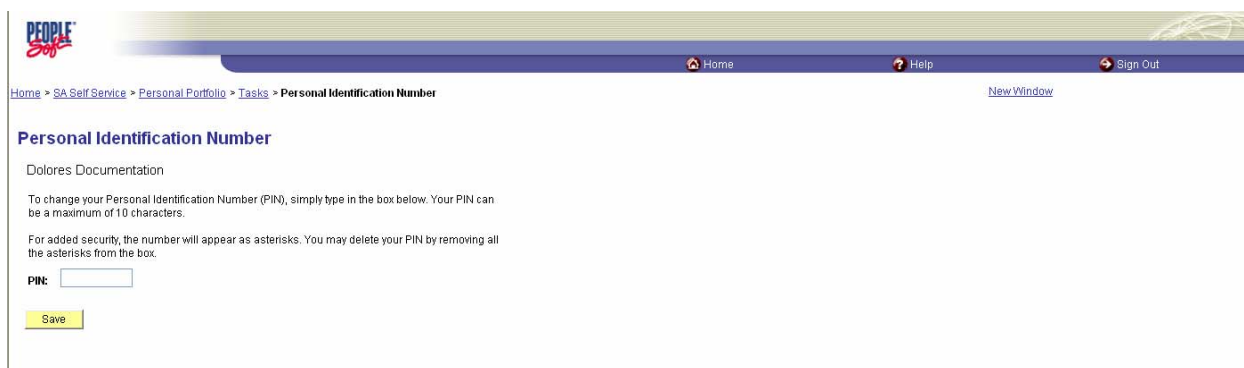
Section 7   Understanding Self-Service Services Data

Self-service Services data is exposed under Security Settings on the Peoplesoft Personal Portfolio home page. The Personal Identification Number and FERPA/Directory Restrictions links in these sections of the home page enable self-service users to assume responsibility for maintaining their own personal identification numbers and FERPA and other privacy restrictions. The pages described here are the self-service pages that appear when users click those links.

7.1   Personal Identification Number Page

Self-service users use the Personal Identification Number page to create their own personal identification number as required.

Navigation: <u>**SA Self Service, Personal Portfolio, Tasks, Personal Identification Number**</u>

7.1.1   Considerations
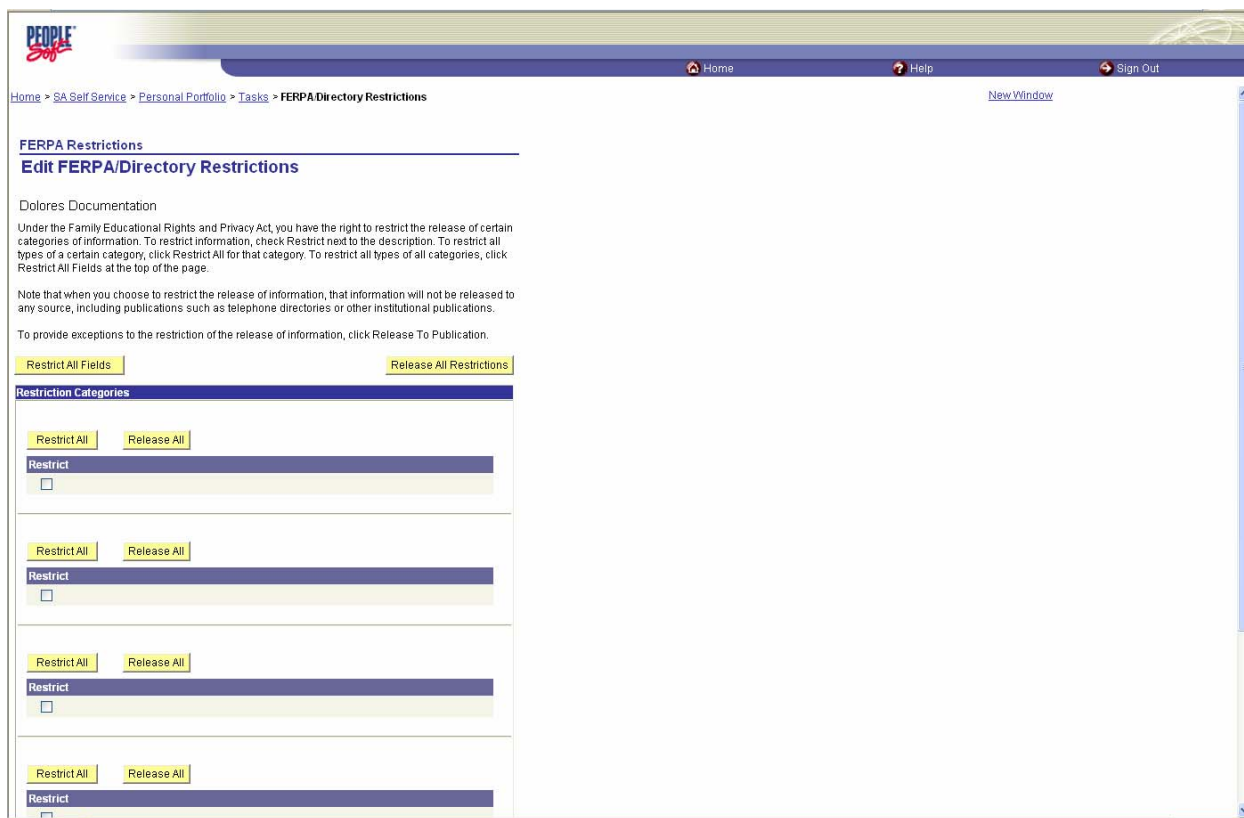
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7.1.2   Recommendations

Note: At this time security will not be given to the Personal Identification Number page.

7.2   FERPA Restrictions Page

Self-service users use the FERPA Restrictions page to place restrictions to prevent the release of data about themselves.

Navigation: SA Self Service, Personal Portfolio, Tasks, FERPA/Directory Restrictions

7.2.1   Considerations

7.2.2   Recommendations

Section 8   Understanding User Preferences

Self-service users use User Preferences to establish default values to identify themselves throughout their use of each PeopleSoft Student Administration and PeopleSoft Contributor Relations collaborative application to which they have access. The default values remain associated with the user, minimizing the need for repetitive data entry.

8.1   User Preferences

Navigation: SA Self Service, Personal Portfolio, Tasks, User Preferences

8.1.1   Considerations

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8.1.2   Recommendations

Note: At this time security will not be given to the User Preferences page.

Section 9   Understanding Password and Personalization

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9.1   Award Adjustment Reasons

Navigation: <u>SA Self Service, Personal Portfolio, Tasks, Password and Personalization</u>

9.1.1   Considerations

Change password

Self-service users click this link to access the <u>Change Password Page</u>, where they can change their own passwords.

Change or set up forgotten password help

Self-service users click this link to access the <u>Change or Set Up Forgotten Password Help Page</u>, where they can request a new password and enter a password clue for password authentication.

Personalization

My preferred language for reports and email is:

Self-service users enter their preferred written language.

Set Personalizations

Self-service users click this link to access the <u>Personalization Page</u>, where they can set default values for themselves,

Email

E-mail Address

Self-service users enter the email address to which they want their passwords and other maintenance items sent.
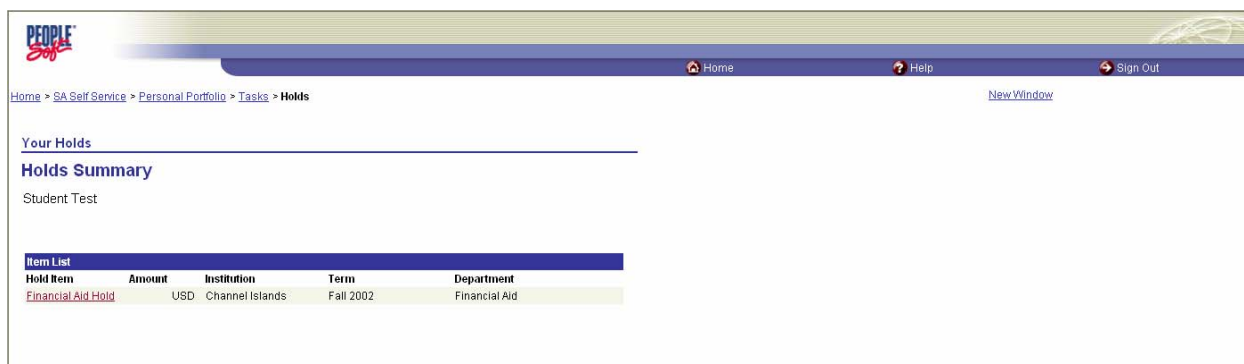
9.1.2   Recommendations

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Section 10   Understanding Self-Service Service Indicators

Self-service Service Indicators data is exposed under the Holds and To Do's section of the Peoplesoft Personal Portfolio home page. You can allow self-service users to be responsible for viewing and resolving their own service indicator issues by providing the Holds link here.

10.1   Holds Summary Page

Navigation: SA Self Service, Personal Portfolio, Tasks, Holds

10.1.1   Considerations

Hold Item   Self-service users click this link to access the Hold Item Page, where they can view more information about the specific hold, including whom to contact.

10.1.2   Recommendations

Section 11   Understanding Self Service Checklists Data

Self-service Checklists data exposed under the Holds and To Do's section of the Peoplesoft Personal Portfolio home page. You can allow self-service users to be responsible for viewing and resolving their own checklist items by providing the To Do's link here.

11.1   To Do Summary List Page

Navigation: <u>**SA Self Service, Personal Portfolio, Tasks, To Do List**</u>

11.1.1   Considerations

To Do Item   Self-service users click this link to access the <u>Hold Item Page</u>, where they can view more information about the specific checklist item, including whom to contact.

11.1.2   Recommendations

Section 12   Understanding Self Service Identification Data

Self-service Identification data is exposed under the Credential section of the Peoplesoft Personal Portfolio home page. You can allow self-service users to be responsible for viewing and maintaining their own languages, license and certificates, memberships, and work experience data by providing those links here.

12.1   Languages Summary Page

Navigation: SA Self Service, Personal Portfolio, Tasks, Languages

12.1.1   Considerations

12.1.2   Recommendations

Note: At this time security will not be given to the User Preferences page.

12.2   License and Certificates Summary Page

Navigation: SA Self Service, Personal Portfolio, Tasks, Languages and Certificates

12.2.1   Considerations

License/Certificate	Self-service users click this link to access a view-only version of the License/Certificate Detail Page, where they can review information about themselves for the specific license, degree, or certificate.
Edit	Self-service users click this button to access the License/Certificate Detail Page, where they can edit information about their specific license, degree, or certificate.
Delete	Self-service users click this button to access the Delete Confirmation Page, where they can confirm that this is the license, degree, or certificate to delete and complete or abort the deletion process.
Add a License/Certificate	Self-service users click this button to access the License/Certificate Detail Page, where they can add a license, degree, or certificate for themselves.

12.2.2   Recommendations

Note: At this time security will not be given to the License and Certificates Summary page.

12.3 Membership Summary Page

Navigation: <u>SA Self Service, Personal Portfolio, Tasks, Memberships</u>

12.3.1 Considerations

Organization	Self-service users click this link to access a view-only version of the Membership Detail Page, where they can review information about their membership or association with this organization.
Edit	Self-service users click this button to access the Membership Detail Page, where they can edit information about their membership or association with this organization.
Delete	Self-service users click this button to access the Delete Confirmation Page, where they can confirm that this is the membership or association with this organization to delete and complete or abort the deletion process.
Add a Membership	Self-service users click this button to access the Membership Detail Page, where they can add membership or association with an organization.

12.3.2 Recommendations

Note: At this time security will not be given to the Membership Summary page.

12.4 Work Experience Summary Page

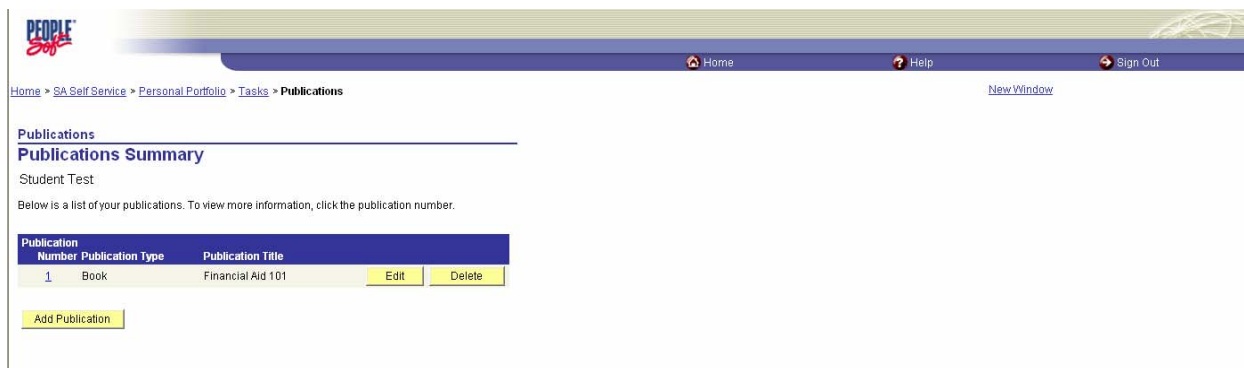**Navigation:** <u>SA Self Service, Personal Portfolio, Tasks, Work Experience</u>

12.4.1 Considerations

Edit	Self-service users click this button to access the <u>Employment Details Page</u>, where they can edit information about this work experience.
Delete	Self-service users click this button to access the <u>Delete Confirmation Page</u>, where they can confirm that this is the work experience to delete and complete or abort the deletion process.
Add a work experience	Self-service users click this button to access the <u>Employment Details Page</u>, where they can add a work experience.

12.4.2 Recommendations

Note: At this time security will not be given to the Work Experience Summary Summary page.

12.5 Understanding Self Service Participation Data

Navigation: <u>SA Self Service, Personal Portfolio, Tasks, Publications</u>

12.5.1 Considerations

Publication Number	Self-service users click this link to access a view-only version of the <u>Publication Detail Page</u>, where they can review information about this publication.
Edit	Self-service users click this button to access the <u>Publication Detail Page</u>, where they can edit information about this publication.
Delete	Self-service users click this button to access the <u>Delete Confirmation Page</u>, where they can confirm that this is the publication to delete and complete or abort the deletion process.
Add Publication	Self-service users click this button to access the <u>Publication Detail Page</u>, where they can add a publication.

12.5.2 Recommendations

Note: At this time security will not be given to the Publications page.

12.6   Extracurricular Activities

Navigation: <u>SA Self Service, Personal Portfolio, Tasks, Extracurricular Activities</u>
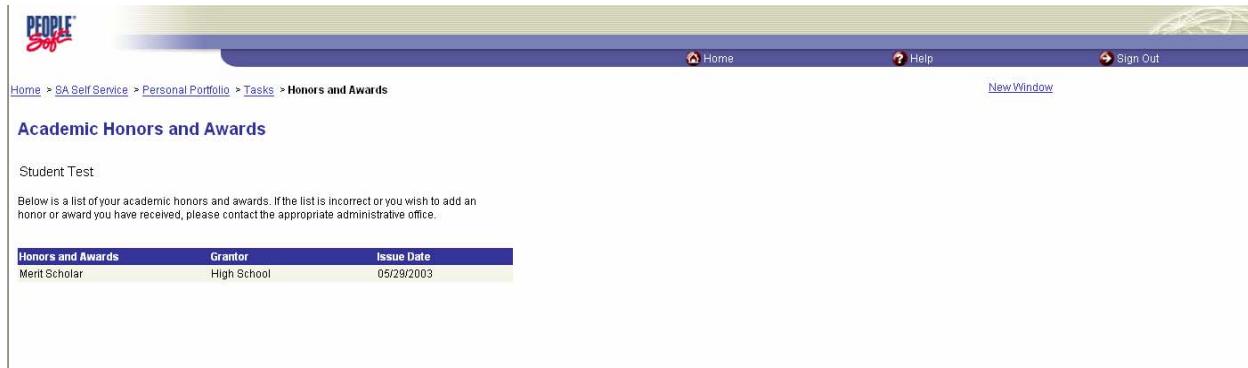

12.6.1   Considerations

12.6.2   Recommendations

Note: At this time security will not be given to the Extracurricular Activities page.

12.7   Academic Honors and Awards Page

Navigation: **SA Self Service, Personal Portfolio, Tasks, Honors and Awards**

12.7.1   Considerations

12.7.2   Recommendations

Note: At this time security will not be given to the Honors and Awards page.