CSU CI: Setting Up Service Indicators

1.0 Service Indicator Setup

There are a number of different steps that must be done in PeopleSoft to setup service indicators. Prior to creating service indicators, you must create service impacts on the Service Table page. Then you define service indicator codes, associated service indicator reason codes and specify the service impact.

1.1 Service Table

The service Table is where you create the service impacts that will later be part of building the service indicators.

Navigation: Home > Manage Student Records > Manage Academic Records > Setup > Service Table

Find an Existing Value

Search By: Academic Institution
Academic Institution: CICMP

Include History  Correct History

Search  Advanced Search

Add a New Value

Search Results

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Service Impact</th>
<th>Positive Service Impact</th>
<th>System Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CICMP</td>
<td>AENR</td>
<td>N</td>
<td>N</td>
<td>Stops initial enrollment</td>
</tr>
<tr>
<td>CICMP</td>
<td>CENR</td>
<td>N</td>
<td>N</td>
<td>Restricts all enroll activity</td>
</tr>
<tr>
<td>CICMP</td>
<td>ENER</td>
<td>N</td>
<td>N</td>
<td>Prevents enroll verification</td>
</tr>
<tr>
<td>CICMP</td>
<td>GRADE</td>
<td>N</td>
<td>N</td>
<td>Prevents grade report</td>
</tr>
<tr>
<td>CICMP</td>
<td>IENR</td>
<td>N</td>
<td>N</td>
<td>Add/Drop OK</td>
</tr>
<tr>
<td>CICMP</td>
<td>REM</td>
<td>N</td>
<td>N</td>
<td>Remedial Course Required</td>
</tr>
</tbody>
</table>

1. The AENR, CENR, and IENR service impact values are delivered with your system for use in the automated Enrollment process. These values should not be modified. You can, however, modify other service impact values and create new ones.
2. With delivered service impacts, if the system displays the System Function check box already selected, do not change it.

3. The table below describes the functionality of all of the PeopleSoft delivered service impacts:

<table>
<thead>
<tr>
<th>System Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CENR</td>
<td>Restricts all enrollment activity (such as adds, drops, swaps, or wait lists) for a student with existing enrollment for the current term.</td>
</tr>
<tr>
<td>IENR</td>
<td>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.</td>
</tr>
<tr>
<td>AENR</td>
<td>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.</td>
</tr>
<tr>
<td>ENVER</td>
<td>Prevents the enrollment verification process from printing a student's enrollment verification request.</td>
</tr>
<tr>
<td>GRADE</td>
<td>Prevents the Student Grade Report process (SRGRDRPJ) from generating a grade report for a student.</td>
</tr>
</tbody>
</table>

1.2 Delivered Service Impact Values – DO NOT MODIFY AENR, CENR, or IENR.

Navigation: Home > Manage Student Records > Manage Academic Records > Setup > Service Table

1.3 Setup Service Indicator Codes

The process of creating service indicators involves creating the codes and associated reasons. This can be done in a number of locations in the database. Here are the locations...
1. Manage Student Records ➔ Manage Academic Records ➔ Setup ➔ Service Indicator Tables ➔ Service Indicator Codes

2. Manage Student Records ➔ Track Student Careers ➔ Setup ➔ Service Indicator Tables ➔ Service Indicator Codes

1.3.1 Adding a New Service Indicator Value

Navigation:  Home > Manage Student Records > Manage Academic Records > Setup > Service Indicator Table > Service Indicator Codes

Click on the Add a New Value. The page below will then be displayed.

Home > Manage Student Records > Manage Academic Records > Setup > Service Indicator Tables

Service Indicator Tables

Add a New Value

Academic Institution: CICMP
Service Indicator Code: 
Add

Type in the three character code you want for the service indicator you’re creating and hit Add button.

Home > Manage Student Records > Manage Academic Records > Setup > Service Indicator Codes

Service Indicator Reasons

Academic Institution: CICMP  Channel Islands
Service Indicator Code: EPT

Effective Date: 01/01/1901  Status: Active
Description: English Remediation Required
Short Description: Eng Req

Effective Date: 01/01/1901  Status: Active
Description: Remedial Course Required
Term Category: Regular

1. Designate the effective date and whether the indicator is active or inactive.
2. Type in the description and short description.

3. If this is a positive service indicator, check that box.

4. Attach the appropriate service impact. This should have been decided upon prior to setting up the service indicators. A good example would be a student that owed money for tuition for their current term might have the above holds placed on them so they would not be able to get their grades until they resolved this fiscal responsibility.

1.4 Service Indicator Reasons

Navigation: Home > Manage Student Records > Manage Academic Records > Setup > Service Indicator Table > Service Indicator Reasons

1.4.1 Service Indicator Reason Values

1. If this is a positive service indicator, the box will be populated from the first page.

2. If you do not select a reason, the user ID can use the service indicator in all cases.

3. The instructions box is where you can type in free form information that will be displayed both when the service indicator is referred by other users and when a student looks at their own service indicator information through the web Student Self Service.

2.0 Granting Service Indicator Security

The process of developing the security for service indicators should also be a joint venture among all of the modules. There will be a finite list of service indicators and the affiliated service impacts that will be built. Then each staff member will need a permission list that granted them access to one or more of the locations which this can take place from. The next step is to grant the specific service indicator security to the each staff member. This takes place within the security component of Secure Student Administration by User ID.
2.1 Secure Student Administration Service Indicator Security

The service indicator security is usually granted by your designated security administrator or by the lead (super user) of each module for the staff that have access to that module’s service indicators.

If you have a large group of users that are getting the same set of service indicators, and the rest of the Student Administration security is the same a faster technique is to use the User Security Replacement (Design Student Administration Æ Define Student Administration Æ Setup Æ User Security Replacement). Refer to the SA Security Setup Guide v8.0 for the details on using this function.

**Navigation:** Design Student Administration Æ Define Student Administration Æ User ID Æ Service Indicator Security

### Service Indicator Security

<table>
<thead>
<tr>
<th>User ID:</th>
<th>csstu</th>
<th>OICMF</th>
<th>Documentation,Delecs</th>
<th>Channel Islands</th>
</tr>
</thead>
</table>

#### Security Settings

<table>
<thead>
<tr>
<th>Service Indicator Code</th>
<th>Reason</th>
<th>Placement</th>
<th>Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>EBL</td>
<td>Enroll Block for U Status</td>
<td>EBLE</td>
<td>Enrollment Block English</td>
</tr>
<tr>
<td>EBL</td>
<td>Enroll Block for U Status</td>
<td>EBLM</td>
<td>Enrollment Block Math</td>
</tr>
<tr>
<td>ELM</td>
<td>Math Remediation Required</td>
<td>ELM1</td>
<td>ELM1</td>
</tr>
<tr>
<td>ELM</td>
<td>Math Remediation Required</td>
<td>ELM2</td>
<td>ELM2</td>
</tr>
<tr>
<td>ELM</td>
<td>Math Remediation Required</td>
<td>ELM3</td>
<td>ELM3</td>
</tr>
<tr>
<td>EFT</td>
<td>English Remediation Required</td>
<td>EFT1</td>
<td>EFT1</td>
</tr>
<tr>
<td>EFT</td>
<td>English Remediation Required</td>
<td>EFT2</td>
<td>EFT2</td>
</tr>
<tr>
<td>EFT</td>
<td>English Remediation Required</td>
<td>EFT3</td>
<td>EFT3</td>
</tr>
<tr>
<td>EFT</td>
<td>English Remediation Required</td>
<td>EFT0</td>
<td>EFT0</td>
</tr>
<tr>
<td>FIN</td>
<td>Financial Aid Hold</td>
<td>DEFLT</td>
<td>Default on Federal Grant Loan</td>
</tr>
</tbody>
</table>

#### 2.1.1 Grant Service Indicator Security

1. Navigate to the page above and select the user you want to grant service indicators to.
2. Click on the magnifying glass and select the first service indicator code.
3. Tab out of the field and do the same process for the granting the reason.
4. If a service indicator code has several reasons and you want the user to have the capacity to add and release them all, then you must repeat the process for all of the reason codes desired.
5. If you want the user to be able to add and release the values you just setup, then check the boxes at the right for placement and release.
6. You can give a user access to just place or release the service indicator. There are situations where you don’t want a staff member to be able to put a specific service indicator on a student, however you want them to be able to release it based on agreed to business rules; or visa versa.
7. Repeat this process until you have added all of the service indicators you want the user to have access to.
8. Save the page.

9. Repeat the process for all other users that need to be able to place and release service indicators or use the User Profile Replacement process.

10. Remember the user must also have been granted security to the appropriate page through the permission lists they have also been granted.