



Personal Portfolio

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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

Home > Design Student Administration > Define Campus Community > Setup > Type Control

Type Control

Name Type	Type Control		
Preferred	Edit - No Delete	+	-
Primary	Display Only	+	-

Addresses

Address Type	Type Control		
Home	Display Only	+	-
Mailing	Edit - No Delete	+	-
Permanent	Full Edit	+	-

Phones

Phone Type	Type Control		
Home	Edit - No Delete	+	-
Cellular	Full Edit	+	-
Business	Full Edit	+	-

Electronic Addresses

Email Type	Type Control		
Home	Full Edit	+	-
Business	Full Edit	+	-

Save

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](#)

PEOPLEsoft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > Names [New Window](#)

Names

Current Names

Dolores Documentation

Below is a list of your current names. Each name has a type associated with it that is indicative of the name's use. For example, a name with the type Preferred would be the name you prefer to be used under most circumstances.

To add, change, or delete a name, click the appropriate link.

Preferred			
Name:	Documentation,Dolores		
Prefix:			
First Name:	Dolores	Middle:	
Last Name:	Documentation	Suffix:	
Change Preferred name			

Primary			
Name:	Documentation,Dolores		
Prefix:			
First Name:	Dolores	Middle:	
Last Name:	Documentation	Suffix:	

[Add a new name](#)

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

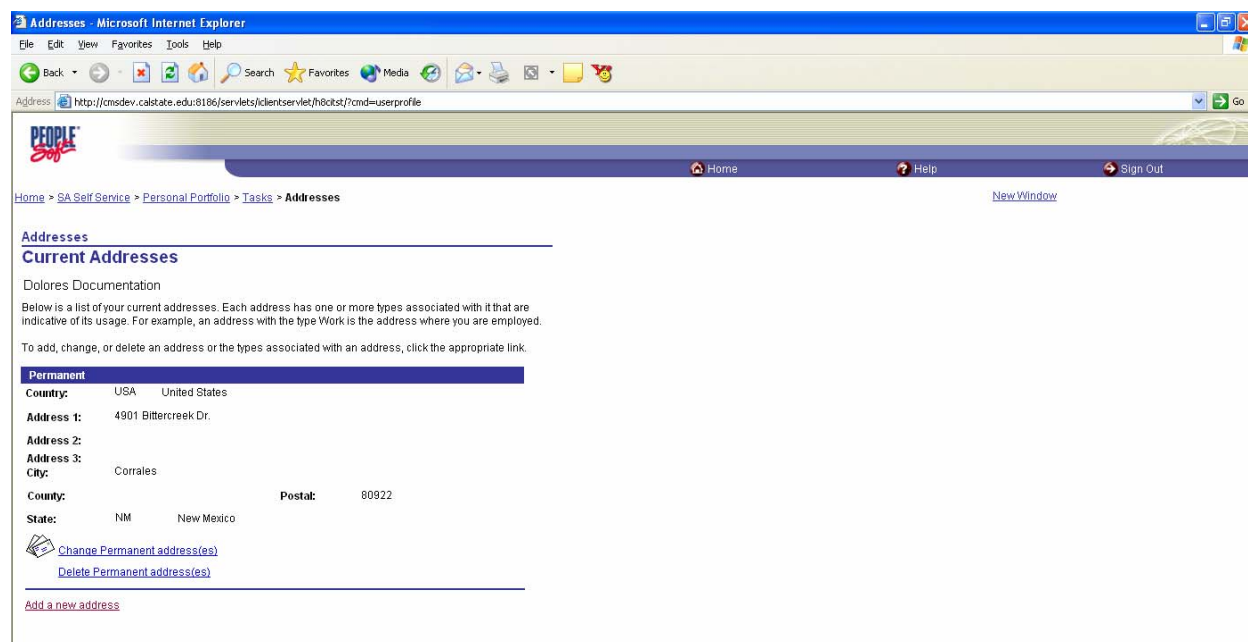
Students will only have access to view their names.

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: SA Self Service, Personal Portfolio, Tasks, Addresses



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: [SA Self Service, Personal Portfolio, Tasks, Phones](#)

PEOPLE Soft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > Phone Numbers [New Window](#)

Phone Numbers

Dolores Documentation

Below is a list of your phone numbers. To add a phone number, click Add a Phone Number. Each phone number must have a unique type. You may indicate your primary contact phone number by selecting the Primary Phone checkbox. If you select more than one checkbox, the last checkbox you selected will be saved as the Primary Phone Number.

Phone Type	Telephone	Ext	Preferred	
Mailing	555/898-8002		<input checked="" type="checkbox"/>	Delete

[Add a Phone Number](#)

[Save](#) [Return to Personal Portfolio](#)

* Required Field

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

Home > SA Self Service > Personal Portfolio > Tasks > Email Addresses

[New Window](#)

Email Addresses

Dolores Documentation

Below is a list of your email addresses. To add a new address, click Add an Email Address. Each address must have a unique type, and should be in the form of name@address.ext (e.g., jsmith13@peoplesoft.com). The last type for which the Preferred checkbox has been selected will be saved as the preferred email address.

Email Type	Email Address	Preferred	
Home	student@yahoo.com	<input checked="" type="checkbox"/>	Delete

Add an Email Address

Save

* Required Field

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**

The screenshot shows the 'Internet Addresses' page in the PEOPLE Soft system. The page has a header with the PEOPLE Soft logo and navigation links: Home, Help, and Sign Out. Below the header, there is a breadcrumb trail: Home > SA Self Service > Personal Portfolio > Tasks > Internet Addresses. The main content area is titled 'Internet Addresses' and includes a link to 'Dolores Documentation'. Below this, there is a paragraph explaining that the list shows websites, FTP sites, etc. owned or maintained by the user. A table with the following structure is displayed:

Type	URL Address
Other	mytspide.com

Below the table, there are three buttons: 'Add an Internet Address', 'Save', and 'Delete'. A note at the bottom states '* Required Field'.

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.

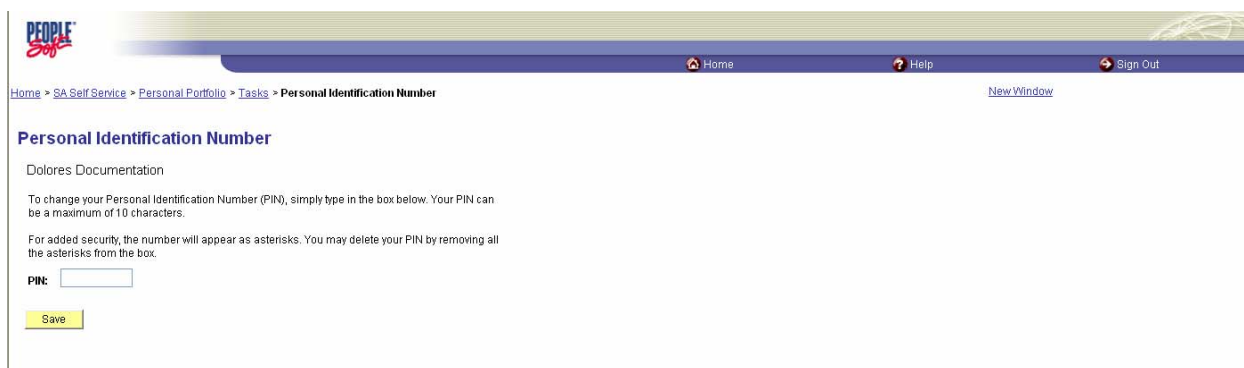
Section 7 Understanding Self-Service Services Data

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: [SA Self Service, Personal Portfolio, Tasks, Personal Identification Number](#)



The screenshot shows the 'Personal Identification Number' page within the Peoplesoft Personal Portfolio. The page has a blue header with the Peoplesoft logo on the left and navigation links for Home, Help, and Sign Out on the right. Below the header, a breadcrumb trail reads: Home > SA Self Service > Personal Portfolio > Tasks > Personal Identification Number. A 'New Window' link is also present. The main content area is titled 'Personal Identification Number' and includes a link to 'Dolores Documentation'. It contains instructions: 'To change your Personal Identification Number (PIN), simply type in the box below. Your PIN can be a maximum of 10 characters.' and 'For added security, the number will appear as asterisks. You may delete your PIN by removing all the asterisks from the box.' Below this is a text input field labeled 'PIN:' and a yellow 'Save' button.

7.1.1 Considerations

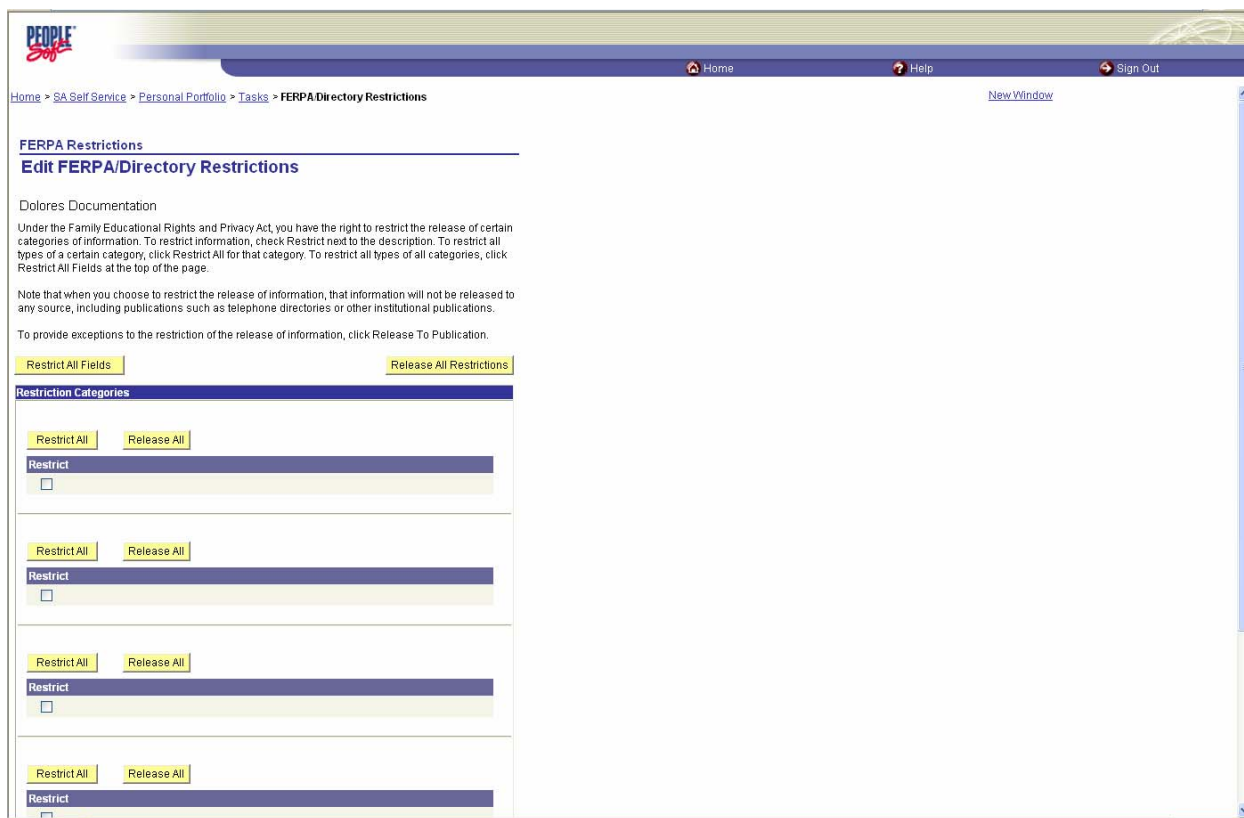
7.1.2 Recommendations

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](#)



PEOPLE
Soft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > FERPA/Directory Restrictions

New Window

FERPA Restrictions

Edit FERPA/Directory Restrictions

Dolores Documentation

Under the Family Educational Rights and Privacy Act, you have the right to restrict the release of certain categories of information. To restrict information, check Restrict next to the description. To restrict all types of a certain category, click Restrict All for that category. To restrict all types of all categories, click Restrict All Fields at the top of the page.

Note that when you choose to restrict the release of information, that information will not be released to any source, including publications such as telephone directories or other institutional publications.

To provide exceptions to the restriction of the release of information, click Release To Publication.

Restrict All Fields Release All Restrictions

Restriction Categories

Restrict All	Release All
Restrict	
Restrict All	Release All
Restrict	
Restrict All	Release All
Restrict	
Restrict All	Release All
Restrict	

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](#)

PEOPLE
Soft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > User Preferences [New Window](#)

User Preferences

[Dolores Documentation](#)

To facilitate your navigation through the different pages, and to avoid having to select the generic values, you may default your most commonly used values for the following fields. Other values will remain available for selection as appropriate for each feature.

Institution: Channel Islands

Academic Career: Undergraduate

Term: Fall 2002

Aid Year:

Save

8.1.1 Considerations

.

8.1.2 Recommendations

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

Section 9 Understanding Password and Personalization

9.1 Award Adjustment Reasons

Navigation: **SA Self Service, Personal Portfolio, Tasks, Password and Personalization**

The screenshot shows a web browser window with the URL http://192.168.1.100/SA_SELF_SERVICE/PERSONAL_PORTFOLIO/TASKS/PASSWORD_AND_PERSONALIZATION. The page has a blue header with the PEOPLE Soft logo and navigation links: Home, Help, and Sign Out. Below the header, a breadcrumb trail reads: Home > SA Self Service > Personal Portfolio > Tasks > Password and Personalization. A link for 'New Window' is also present. The main content area is titled 'General Profile Information' and shows 'Dolores Documentation'. There are two main sections: 'Password' and 'Personalization'. The 'Password' section includes links for 'Change Password' and 'Password Hint'. The 'Personalization' section includes a note that changes require a log off and log back on, a dropdown menu for 'My preferred language for reports and email is:' set to 'English', and a message 'MESSAGE NOT FOUND (14100.630)'. Below these is an 'Email' section with a text input field for 'Email Address:' and a 'Save' button. At the bottom of the page, there is another 'Save' button and a link to 'Return to Personal Portfolio'.

9.1.1 Considerations

Change password

Self-service users click this link to access the [Change Password Page](#), where they can change their own passwords.

Change or set up forgotten password help

Self-service users click this link to access the [Change or Set Up Forgotten Password Help Page](#), 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 [Personalization Page](#), 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.

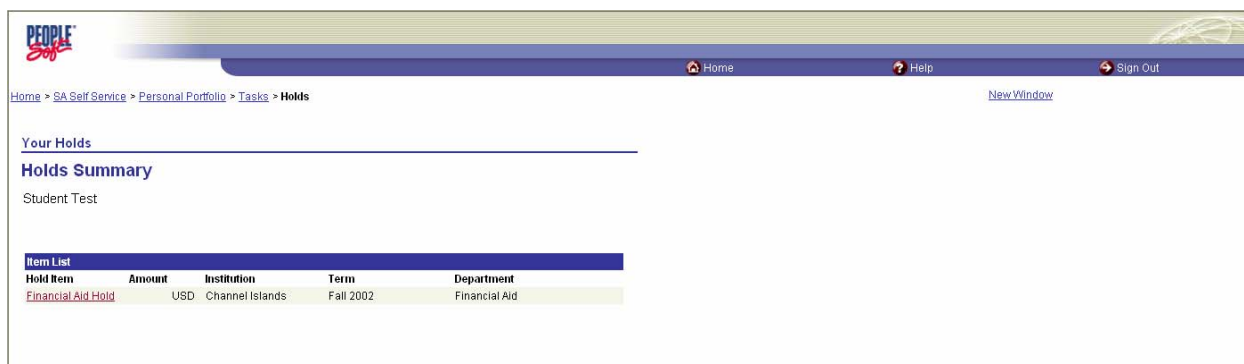
9.1.2 Recommendations

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**



Item List				
Hold Item	Amount	Institution	Term	Department
Financial Aid Hold	USD	Channel Islands	Fall 2002	Financial Aid

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: [SA Self Service, Personal Portfolio, Tasks, To Do List](#)

PEOPLE'Soft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > To Do List

[New Window](#)

To Do List

To Do List Summary

Student Test

Below is a list of your current To Do items. To sort or filter your list of To Do items, change the options below and click Search.

Sort By:

Show only

Due Date:

Institution:

Function:

To Do Item	Due Date	Institution	Function
Dependent Verification Worksheet	06/26/2003	Channel Islands	Financial Aid
Parent 2002 Federal Tax Return	06/26/2003	Channel Islands	Financial Aid
Social Security Card	06/26/2003	Channel Islands	Financial Aid
Student's 2002 Federal Tax Rt.	06/26/2003	Channel Islands	Financial Aid

11.1.1 Considerations

To Do Item

Self-service users click this link to access the [Hold Item Page](#), 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](#)

PEOPLE
Soft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > Languages [New Window](#)

Languages

Languages Summary

Student Test

Below is a list of your languages. To view details, click the language name. To add a language, click Add a Language.

Language	Speaking Proficiency	Reading Proficiency	Writing Proficiency		
Flemish	High	High	High	Edit	Delete

[Add a Language](#)

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**

PEOPLE Self Service

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > Licenses and Certificates

New Window

Licenses and Certificates

Licenses and Certificates Summary

Student Test

Below is a list of your licenses and certificates. To view details, click the license/certificate name. To add a license or certificate, click Add a License/Certificate.

License/Certificate	Issue Date	Expiration Date		
Animal Health Tech Cert	01/01/2003	12/31/2003	Edit	Delete

[Add a License/Certificate](#)

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: **SA Self Service, Personal Portfolio, Tasks, Memberships**



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: **SA Self Service, Personal Portfolio, Tasks, Work Experience**

The screenshot shows the 'Work Experience Summary' page in the PEOPLE Soft system. The page has a blue header with the PEOPLE Soft logo on the left and navigation links for Home, Help, and Sign Out on the right. Below the header, a breadcrumb trail reads: Home > SA Self Service > Personal Portfolio > Tasks > Work Experience. A 'New Window' link is also present. The main content area is titled 'Work Experience' and 'Work Experience Summary'. Below this, it says 'Student Test'. There is a table with three columns: 'Start Date', 'End Date', and 'Employer'. Below the table is a yellow button labeled 'Add a work experience'.

12.4.1 Considerations

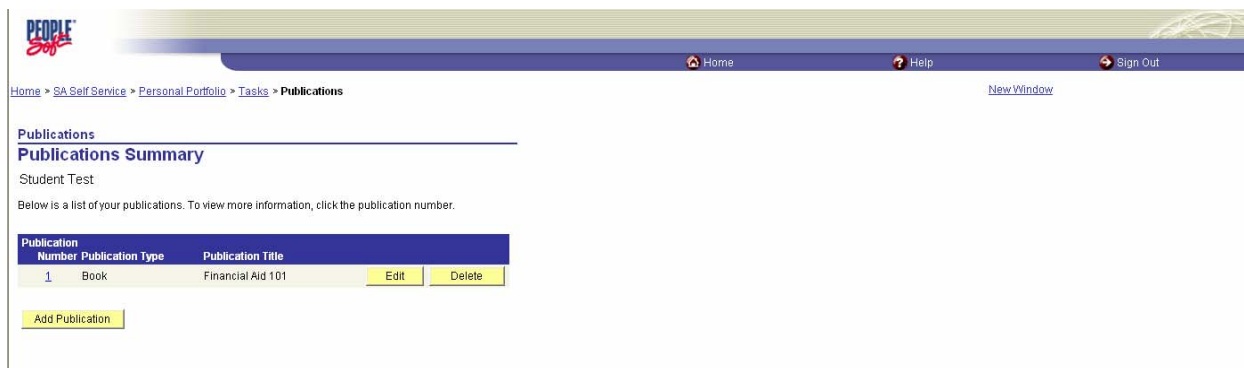
- | | |
|------------------------------|---|
| Edit | Self-service users click this button to access the Employment Details Page , where they can edit information about this work experience. |
| Delete | Self-service users click this button to access the Delete Confirmation Page , where they can confirm 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 Employment Details Page , 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: **SA Self Service, Personal Portfolio, Tasks, Publications**



12.5.1 Considerations

Publication Number

Self-service users click this link to access a view-only version of the [Publication Detail Page](#), where they can review information about this publication.

Edit

Self-service users click this button to access the [Publication Detail Page](#), where they can edit information about this publication.

Delete

Self-service users click this button to access the [Delete Confirmation Page](#), 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 [Publication Detail Page](#), 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: **SA Self Service, Personal Portfolio, Tasks, Extracurricular Activities**

PEOPLE
Soft

Home Help Sign Out

Home > SA Self Service > Personal Portfolio > Tasks > Extracurricular Activities [New Window](#)

Extracurricular Activities

Student Test

Below is a list of your extracurricular activities. If the list is incorrect or you wish to add an activity, please contact the appropriate administrative office.

Description	Office Held	Start Date	Details
Rotary Member		01/01/2002	

[Return to Personal Portfolio](#)

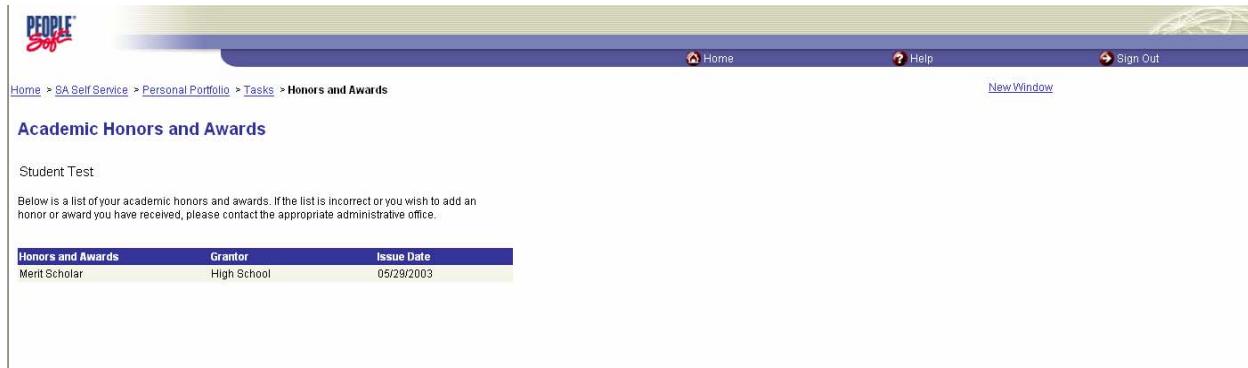
12.6.1 Considerations

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**



The screenshot shows the 'Academic Honors and Awards' page within the PEOPLE Soft application. The page has a blue header with the PEOPLE Soft logo on the left and navigation links for Home, Help, and Sign Out on the right. Below the header, a breadcrumb trail reads: Home > SA Self Service > Personal Portfolio > Tasks > Honors and Awards. A 'New Window' link is also present. The main content area is titled 'Academic Honors and Awards' and includes a 'Student Test' section. Below this, a message states: 'Below is a list of your academic honors and awards. If the list is incorrect or you wish to add an honor or award you have received, please contact the appropriate administrative office.' A table follows, displaying a single record for a 'Merit Scholar' awarded by 'High School' on '05/29/2003'.

Honors and Awards	Grantor	Issue Date
Merit Scholar	High School	05/29/2003

12.7.1 Considerations

12.7.2 Recommendations

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