



External Organizations Guide

Draft

03/19/02

REVISION CONTROL

Document Title: External Organizations Guide**Author:** SOSS

Date	By	Action	Pages
02/04/02	Todd McElroy	Created initial draft	All
02/07/02	Ron Basich	update	
03/13/02	Todd McElroy	Additional updates	All
03/19/02	Todd McElroy	Removed Legacy ID from list of maintained fields.	5
05/14/02	Todd McElroy	Added CO Maintenance and Missing Codes sections	6-9
05/20/02	Todd McElroy	Added code sources	6

Review/Approval History

Date	By	Action	

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Overview

The PeopleSoft Student Administration (SA) application requires campuses to maintain a list of external organizations. These organizations are typically high schools and postsecondary institutions that are used in the recruiting process and for tracking academic transcripts. There are numerous federal, state and private organizations that provide lists/files of educational institutions. Maintaining an unduplicated comprehensive list of these educational institutions can be a time consuming task and the effort is reduced if the codes are maintained centrally by the Chancellor's Office (CO).

The CO and SOSS SA team have developed an approach where by the educational institutions in the external organizations table can be maintained centrally, while still allowing individual campuses to enter codes for their own needs. The purpose of this document is to outline this process.

Requirements

Specifically, the pilot campuses and 1st wave campuses have agreed that the external organizations should contain at a minimum:

1. All California high schools and one generic entry per state for other states.
2. All postsecondary institutions in the United States. At least those that are Federally & State recognized.
3. For international educational institutions, one generic external organization per country

An institution in one of the above categories can have multiple "codes" that uniquely identifies that institution. Some of these codes include; OPEID, FICE, Inst of Origin, CEEB and Fed School. Unfortunately, the various sources for these codes do not work with one another to create one master list. That becomes the burden of the maintenance process.

Approach

PeopleSoft stores educational institutions as "External Organizations". One external organization record for each institution. Included in this record are all the various codes that an institution is known by. Maintaining an institution as a single external organization can be difficult because the various input sources (files) typically do not contain codes that can be mapped from one source to another.

In order to maintain a single list of institutions and accepting files from the various sources, a strategy or approach was developed. This approach involves using two Oracle tables, one for High Schools and a second for Postsecondary Schools to capture the institutional data. The two tables are then brought together and a SOSS SA baseline developed process is used to import these institutions into the PeopleSoft External Organizations table. See appendix A for a diagram of this process.

SOSS Maintained Codes

Not all external organizations will be maintained centrally by the CO. External organizations that are maintained by the CO will have an Org ID that begins with the letter 'C', followed by 8 digits. The baseline external organization process will only maintain certain fields of the external organization data. External organizations that do not begin with a 'C', i.e. not maintained by the CO will be maintained entirely by the individual campus. This might include select feeder high schools outside of California.

When changes to external organizations occur, only certain fields will be updated, all other fields will remain untouched and can be maintained by the campus. For example, if an institutions zip code changes, but a campus has added a "contact" – that contact's name, title, telephone number, etc. will not be erased or otherwise lost when the institution's zip code is updated. The fields being maintained by the baseline process for codes beginning with 'C' are;

External Organization Table - EXT_ORG_TBL

Field	PS Field Name
Org ID	EXT_ORG_ID
Effective Date	EXT_ORG_ID
Status	EFF_STATUS
Description	DESCR
Long Description	DESCR50
Short Description	DESCRSHORT
Offers Courses	OFFERS_COURSES
Organization Type	EXT_ORG_TYPE
Proprietorship	PROPRIETORSHIP
Primary Location (only Location #1, all other locations will be maintained by the campus) Address Lines, City, State, Postal (Zip), and Country	
School Type	LS_SCHOOL_TYPE
School Code: ATP	ATP_CD
School Code: FICE	FICE_CD
School Code: ACT	ACT_CD

CSU ERS Mapping for Ext Org – CSU_COSAR_04MAP

Field	PS Field Name
Institution of Origin Code	CSU_CO_EXT_CODE
OPEID (School Code)	EXT_ORG_OPEID
FEDSCH (School Code)	CSU_EXT_ORG_FEDSCH
CEEB Code	CSU_EXT_ORG_CEEB
CDS 14	CSU_EXT_ORG_CDS14
CDS 7	CSU_EXT_ORG_CDS7

Campus Maintained Codes

From a campus perspective, the maintenance of external organizations will be limited to;

1. External organizations that the campus added themselves, these would have an Org ID that does not begin with a 'C'. The Org ID would be a nine digit number.
2. For Org IDs that begin with 'C', any fields not maintained by the CO. See above list.

Should a campus discover an institution that is missing from the CO maintained institutions or a change to an existing institution, they should notify Chancellor's Office Corporate Information Management or Analytic Studies to have the value added to the central database. It would then be available as a 'C' code in the next release of the baseline.

CO Maintained Institutions

The Chancellor's Office will maintain two tables to capture external institutions. A high school table and a postsecondary table.

High School Table

California now maintains a central list of all the CA High Schools that exist, including those in the construction stage. For non-CA high schools, a single 'state' entry for each state will be delivered and maintained.

This list/file is available monthly and will be loaded into the CO's High School table on a monthly basis, but no less than a quarterly basis. A file will be downloaded and systematically applied to this table, keeping the CO High School table current. The SOSS SA baseline team will then pull down a list of the high schools, load them into a staging table, and create an extract that will be available to the campus to install in their PeopleSoft database instances.

The source for each high school code is outlined in the table below. See Appendix B for the field location of the various external organization codes.

Source	Codes	Method	Timing	URL
CA Dept of Ed	CDS 14 CDS 7 Inst of Origin	Download file	Monthly Annual	http://www.cde.ca.gov/demographics/files/schoolname.htm http://www.cde.ca.gov/privateschools/archives.html
CA Postsec. Ed Comm.	NA	Download file	Quality Assurance (QA)	http://www.cpec.ca.gov/SecondPages/CDSMain.asp
ACT	ACT	Diskette file (subscription)	Monthly	Lookup/Search: http://www.act.org/aap/regist/lookups.html
College Board	ATP	Email file (subscription)	Monthly	Lookup/Search: http://apps.collegeboard.com/cbsearch_code/codeSearchHighschool.jsp

Postsecondary Table

This table is used to maintain all postsecondary institutions. Multiple sources provide files that are included in this table. The sources and the codes they provide are outlined below;

Source	Codes	Method	Timing	URL
US Dept of Ed	OPEID FICE IPEDS? FEDSCH	Download file	Monthly	http://www.ed.gov/offices/OSFAP/P/EPS/dataextracts.html
CA Postsec. Ed Comm.	CDS 14 CDS 7	Download file	Monthly & QA	http://www.cpec.ca.gov/SecondPages/CDSMain.asp
ACT	ACT	Diskette file (subscription)	Annual	Lookup/Search: http://www.act.org/aap/scores/scodes.html
College Board	CEEB	Email file (subscription)	Annual	Lookup/Search: http://apps.collegeboard.com/cbsearch_code/codeSearchCollege.jsp

Note: Institution of Origin codes are not required for postsecondary institutions.

CO Maintenance of High School Tables

Current State

The High School table was assembled by obtaining a recent copy of the public and private K-12 school tables from the California Department of Education (CDE). Schools whose grade span included 12th grade were selected as the basis for the High School table. These tables were combined with institution records for high schools from the CSU COSAR Table 4 (Institution of Origin). To the extent possible, inactive and obsolete records were marked as such in the new data table. Note that no records from COSAR Table 4 were deleted; if more recent data were available from the CDE, the old record was marked with an obsolete date. Lastly, ATP codes from the College Board were added via name matches which were executed both by machine and manually.

Maintenance

School information updates are available from the CDE on a monthly basis, as are updates to the code list of the College Board. In the future, the process for updating the CSU's High School table will be as follows:

- 1) New private and public school files will be obtained from the CDE.
- 2) Records with grade spans including 12th grade will be selected and loaded into a staging table.
- 3) The existing High School table and the staging table will be compared to identify new records (new CDS codes) and changed records (CDS code matches by a name, address, or status change has occurred).
- 4) Records with new CDS codes will be added to the High School table.
- 5) For records with existing CDS codes but other data changes-
 - a. The current record in the High School table will be marked as obsolete.
 - b. The new record from the staging table will be entered with an effective date of the system date at the time of the table update. The new record will include the ATP code, if one exists, from the obsolete record.
- 6) An update of the College Board High School Code list will be obtained from the College Board.
- 7) California high schools from the College Board High School Code List will be selected and loaded to a staging table.
- 8) The existing High School table and the staging table will be compared to identify unmatched codes in the staging table.
- 9) An attempt will be made to match new codes with existing California high schools by name and zip code.

Future

Both the CDE and the California Postsecondary Education Commission maintain websites and file download capabilities which include high school updates. The Chancellor's Office is working with these agencies to establish data maintenance processes, update frequencies, and file downloads which will minimize the need for redundant maintenance processes.

CO Maintenance of Post Secondary Institution Tables

Current State

The College table was established by obtaining an extract from the federal Postsecondary Education Participants System (PEPS). This table, which contains OPEID, Federal school code, and FICE code for postsecondary institutions and sites, was combined with data from COSAR Table 4 (containing CDS codes for California institutions) and COSAR Table 28 (FICE codes for postsecondary institutions nationwide). As in the High School table, data superseded by recent changes were marked as obsolete and retained in the table. In addition institutions which do not appear to be active were marked as such.

Additional data from the College Board, ACT, Xap, Postsecondary Electronic Standards Council, and the California Postsecondary Education Commission. Both federal codes and institution name-zipcode combinations were used to update institution data with College Board and ACT codes

Maintenance

The basic resource for updates to the Postsecondary table will be the PEPS database. Although the stated objective is to update the PEPS database on a weekly basis, it appears that updates may occur only monthly. Furthermore, the College Board and the ACT provide updated files only on an annual basis. Although update frequency should be investigated, a quarterly update frequency is likely to be adequate for college and university data. See appendix A.

As with the High School table, staging tables for PEPS and other agency data will be established. Unmatched or changed data from the PEPS staging table will be applied to the current College table, and superseded data will be marked as obsolete. Updates from the College Board and ACT can then be applied where matching institutions by name and zipcode are identified.

Future

The California Postsecondary Education Commission has established a comprehensive cross-reference for California postsecondary institutions. This resource will be used to ensure that timely and accurate updates to information about California postsecondary institutions will occur.

Populating PeopleSoft External Organizations

In order to populate the PeopleSoft External Organizations table, separate extracts from the CO High School table and CO Postsecondary table are performed prior to each baseline release. The extracts are then loaded into a staging table. Once the data is in the staging table, a Data Mover Script (DMS) will be used to create a “.dat” file. The SOSS SA team has developed SQRs that will update the ‘C’ external organization data based on the data in the “.dat” file. The “.dat” file and SQRs will be packaged into each release of the HRSA baseline and campuses will apply the release to their instance(s).

If the delivery of this data with each new baseline release is not sufficient, then a fix can be packaged and made available to the campuses.

Missing Codes

Given the timing and complexity of data updates for high schools and colleges, CSU campuses may encounter situations in which an applicant's institution of origin is not included (or is difficult to locate) in the institution tables maintained by the Chancellor's Office. For this reason, a procedure has been defined which should assist campuses in identifying data deficiencies and communicating the need for updates to Chancellor's staff.

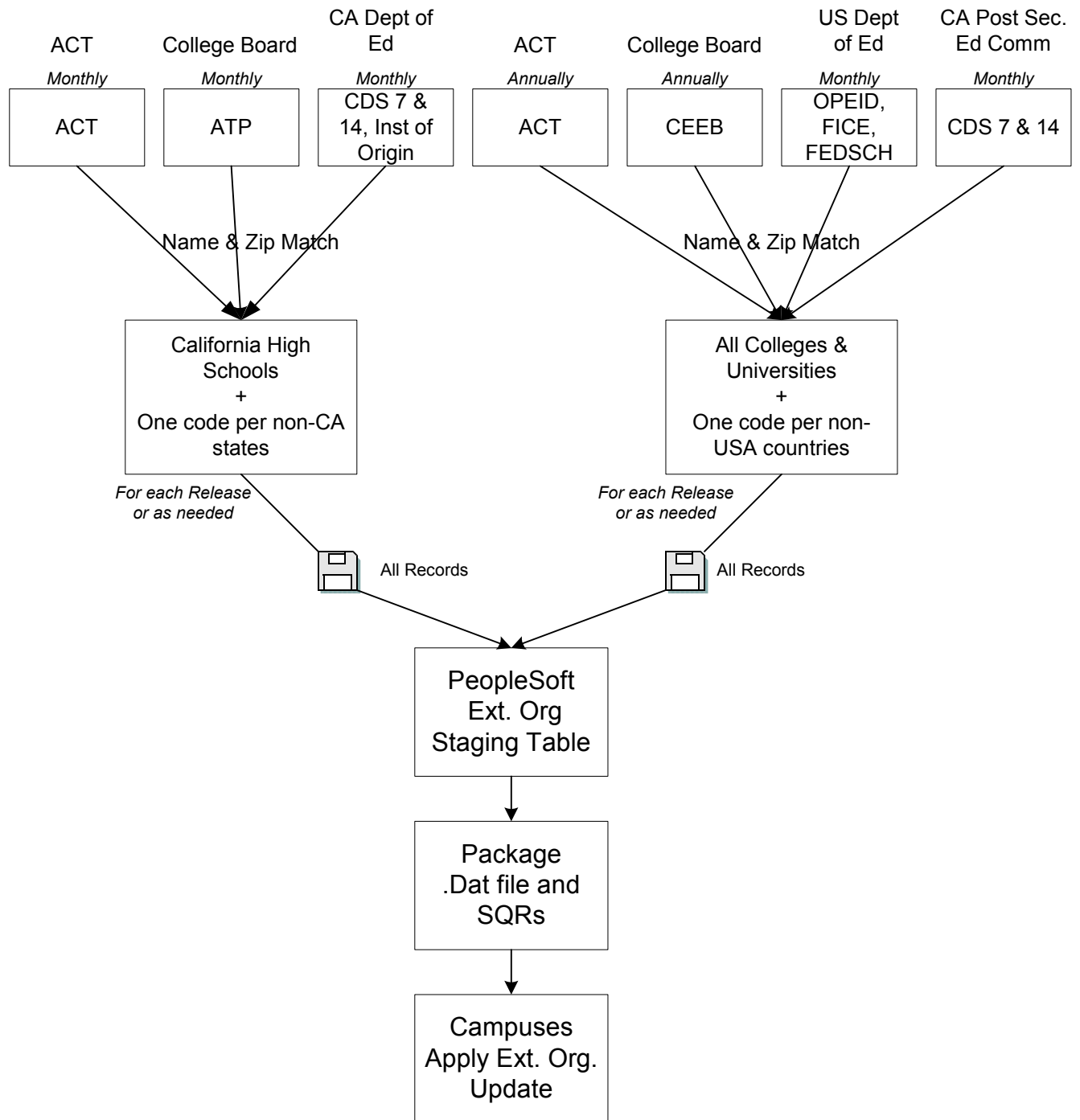
Campuses will be able to view and search the Chancellor's Office version of California high school and national postsecondary institution tables by going to a web site. The site will enable searches by name, city, zip code, and various classification codes, as well as by sub strings of the same fields. This will enable campuses to determine if an institution of interest is included in one of the centrally maintained tables under a slightly different name, or has perhaps been misclassified as a college or high school. It will also permit searches for main campuses of postsecondary institutions in situations where an applicant has provided a local campus site name.

In the event that an institution cannot be located in the central table, an additional web page will be provided which links to web search pages for major sources of institution information. This may include the California Department of Education, the California Postsecondary Education Commission, the Federal Department of Education, the College Board, and ACT.

If data for an institution missing from the CSU institution tables is located at another site, relevant information can be conveyed to Chancellor's Office staff for confirmation and update through email links on the institution table screens and web site search screens.

It should be noted, too, that for open high schools in California and Title IV postsecondary institutions nationwide, the respective state and federal files were loaded in their entirety as of October 2001. Updates to these files will continue to be added on a monthly basis for the foreseeable future. In addition campus closures will be tracked so that it will be increasingly unlikely that a CSU applicant's institution of original will not be locatable in the CSU institutions tables.

In addition to providing the options described here, the Chancellor's Office is cooperating with the California Department of Education and the California Postsecondary Education Commission and has encouraged these agencies to continue the development of search sites and databases which provide comprehensive data on California high schools, colleges, and universities. While there are still some significant issues of data quality, particularly for private high schools, colleges, and universities, the data from state agencies are increasingly comprehensive and timely.

Appendix A – External Organization Maintenance Diagram**External Organization Maintenance**

Appendix B – PeopleSoft School Data Page

The screenshot displays the PeopleSoft interface for the 'Organization Table'. The top navigation bar includes 'Home', 'Worklist', 'Help', and 'Sign Out'. The breadcrumb trail is 'Home > Build Community > Organization Data > Use > Organization Table'. The 'Organization Table' tab is selected, showing details for Org ID: C00000009, Foothill High, with status 'Active'. The 'Organization Details' section includes 'Effective Date: 10/01/2001' and a 'Mapping Values' link. Below this are three panels: 'School Characteristics' (Accredited, Transcript Translation, School Type: High Sch), 'School Codes' (ATP: 052497, FICE, ACT, IPEDS), and 'System Default Values' (Career, Term Type, Unit Type). A 'Catalog Information' section contains fields for School District, Shared Catalog, Catalog Org, and School Code. At the bottom of the main form are buttons for Save, Return to Search, Next in List, Previous in List, Add, Update/Display, Include History, and Correct History. An arrow points from the 'Add' button to a modal dialog titled 'External Org ID: C00000009'. The dialog shows 'Description: Foothill High' and various codes: Institution of Origin Code (013009), LegacyID, OPEID (School Code), FEDSCH (School Code), CEEB Code (052497), CDS 14 (01751010130096), and CDS 7 (0130096). 'OK' and 'Cancel' buttons are at the bottom of the dialog.

PEOPLE
Soft

Home Worklist Help Sign Out

Home > Build Community > Organization Data > Use > Organization Table [New Window](#)

Organization Table Primary Contact and Dept. School Data Vendor Information

Org ID: C00000009 Foothill High

Organization Details View All First 1 of 1 Last

Effective Date: 10/01/2001 Status: Active [Mapping Values](#) + -

School Characteristics

☐ Accredited

☐ Transcript Translation

School Type: High Sch

School Codes

ATP: 052497

FICE:

ACT:

IPEDS:

System Default Values

Career:

Term Type:

Unit Type:

Catalog Information

School District:

☐ Shared Catalog

Catalog Org:

School Code:

Save Return to Search Next in List Previous in List Add Update/Display Include History Correct History

[Organization Table](#) | [Primary Contact and Dept.](#) | [School Data](#) | [Vendor Information](#)

Internet

PEOPLE
Soft

Home Worklist Help Sign Out

Home > Build Community > Organization Data > Use > Organization Table [New Window](#)

External Org ID: C00000009

Description: Foothill High

Institution of Origin Code: 013009

LegacyID:

OPEID (School Code):

FEDSCH (School Code):

CEEB Code: 052497

CDS 14: 01751010130096

CDS 7: 0130096

OK Cancel

Done Internet