



## **Draft - 8.0 Tracking Student Careers Setup Guide**

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**DRAFT**

## REVISION CONTROL

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## Review/Approval History

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This document is published as a baseline guide. Panel shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS/SOSS Student Administration team.

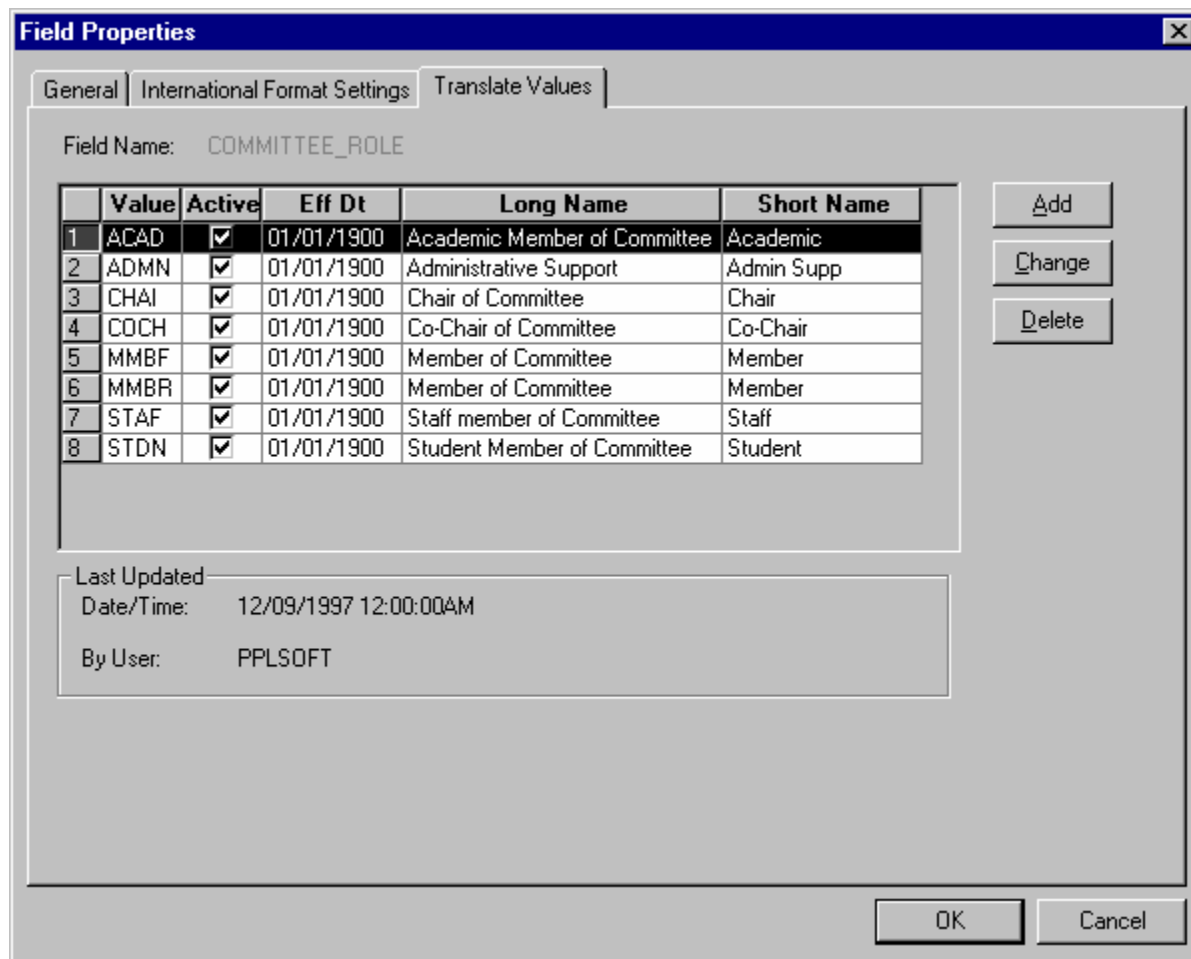
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## Section 1 Tracking Student Careers

### 1.1 Committee Role

Before you can create and manage committees in your system, you need to define the basic committee types and member roles that your institution plans to use. The Committee Table panel enables you to create a template for each type of committee, including defining the list of individuals from whom committee members can be selected, and which member roles should be involved.



The Field Properties dialog box for the field COMMITTEE\_ROLE is shown. It has three tabs: General, International Format Settings, and Translate Values. The General tab is active. The Field Name is COMMITTEE\_ROLE. Below the field name is a table with 6 columns: Value, Active, Eff Dt, Long Name, and Short Name. The table contains 8 rows of data. To the right of the table are three buttons: Add, Change, and Delete. Below the table is a section for Last Updated information, including Date/Time and By User. At the bottom of the dialog are OK and Cancel buttons.

	Value	Active	Eff Dt	Long Name	Short Name
1	ACAD	<input checked="" type="checkbox"/>	01/01/1900	Academic Member of Committee	Academic
2	ADMN	<input checked="" type="checkbox"/>	01/01/1900	Administrative Support	Admin Supp
3	CHAI	<input checked="" type="checkbox"/>	01/01/1900	Chair of Committee	Chair
4	COCH	<input checked="" type="checkbox"/>	01/01/1900	Co-Chair of Committee	Co-Chair
5	MMBF	<input checked="" type="checkbox"/>	01/01/1900	Member of Committee	Member
6	MMBR	<input checked="" type="checkbox"/>	01/01/1900	Member of Committee	Member
7	STAF	<input checked="" type="checkbox"/>	01/01/1900	Staff member of Committee	Staff
8	STDN	<input checked="" type="checkbox"/>	01/01/1900	Student Member of Committee	Student

Last Updated  
 Date/Time: 12/09/1997 12:00:00AM  
 By User: PPLSOFT

#### 1.1.1 COMMITTEE\_ROLE

Before setting up specific committees, review the translate values that are delivered in the system for Committee Roles. **These values can be modified.**

#### Recommendations

### 1.2 Committee Type/Role

You can define templates for committee types, and then use those templates to create and manage specific committees at your institution.

## Page Name: Committee Table

Navigation: Manage Student Records → Track Student Careers → Setup → Committee Type/Role

PEOPLE Softweb

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Committee Type/Role [New Window](#)

### Committee Type/Role

Academic Institution: CSUNR Test University  
Committee Type: UGADMISS

**Committee Description** View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active  
\*Description: Undergraduate Admissions  
Short Description: UGRADMISS  
Record Name: RECRUITERS\_VW

**Committee Role** View All First 1 of 1 Last

\*Committee Role: Member of Committee  
\*Description: Undergrad Admissions Committee  
Short Description: UGRADMISS

Save Add Update/Display Include History Correct History

### 1.2.1 Committee Description

Templates for various committee types can be created here. You can then associate a **search record** that will give you a prompt list of individuals at your institution to choose from each time you create the same committee type.

### 1.2.2 Committee Role

You can specify the member roles—chairperson, faculty member, student member, staff member, and so on - that should be on that committee.

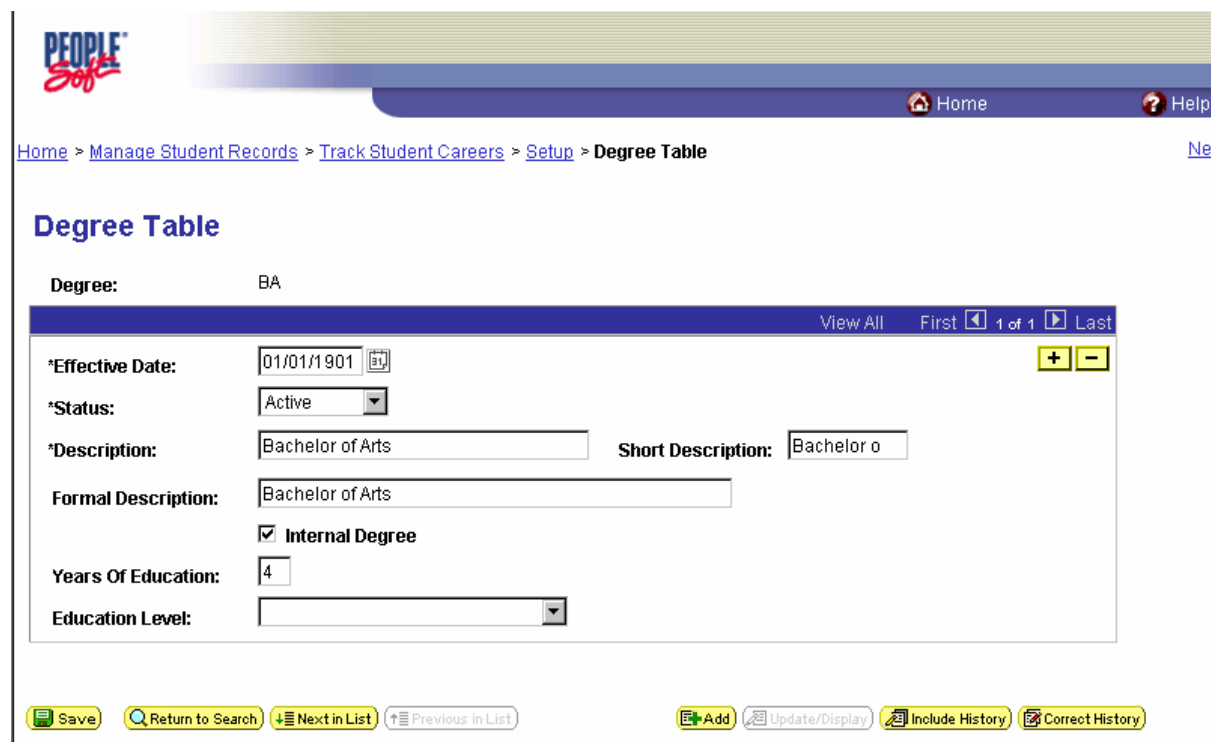
## Recommendations

### 1.3 Degree Table

Use the Degree Table panel to define both internal and external degrees for Admissions and Student Records purposes. You can access this panel in the Defining Student Administration menu as well as through Student Records.

#### Page Name: Degree Table

Navigation: Manage Student Records → Track Student Careers → Setup → Degree Table



PEOPLE Soft

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Degree Table

### Degree Table

Degree: BA

View All First 1 of 1 Last

\*Effective Date: 01/01/1901

\*Status: Active

\*Description: Bachelor of Arts Short Description: Bachelor o

Formal Description: Bachelor of Arts

☒ Internal Degree

Years Of Education: 4

Education Level:

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

#### 1.3.1 Degree Table

Enter a Description, Formal Description, and Short Description. Later, you can choose which description of the Degree displays on a transcript.

The Student Records system generally doesn't use **Years of Education** and **Educational Level**, but you can choose to use them for tracking purposes. Educational Level prompts from the translate table. You can modify these translate values.

Select the **Internal Degree** option to indicate that the Degree is internal to your institution.

#### Recommendations

## 1.4 Degree Honors

Use the Degree Honors Table panel to define Degree Honors for your institution. Examples of Degree Honors might be with Distinction, Highest Honors in, Summa Cum Laude, and so on.

### Panel Name: Degree Honors

**Navigation:** Manage Student Records → Track Student Careers → Setup → Degree Honors Table

PEOPLE Soft

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Degree Honors Table [New Window](#)

### Degree Honors Table

Honors Code: HON Honors Type: Degree Honors Test University

View All First 1 of 1 Last

\*Effective Date: 01/01/1901 + -

Status: Active

\*Description: Honors in Short Description: Honors in

Formal Description: Honors in

☒ Print on Diploma

☒ Print on Transcript

Save Add Update/Display Include History Correct History

### 1.4.1 Degree Honors Table

Select an **Honors Type**. **Honors Type values are delivered with your system as translate values. These values do have coding attached to them. Modification to the values would require some programming effort.** Your choices are Degree Honors, or Degree Plan and Sub-Plan prefixes and suffixes. Honors Type designates the type of Honor as well as the general location of display on the transcript. An Honors Type of Degree Plan Suffix indicates that the Honor will display after the Degree Plan. Enter the Honors Code. **You can have multiple Honors Codes per Honors Type.** The system will default the Honors Type and Honors Code values into the panel. Select the **Print on Diploma** and/or the **Print on Transcript** options to display the Formal Description of the Degree Honor on the Diploma and Transcript.

### Recommendations

## 1.5 Extracurricular Activity Table

Use the Extracurricular Activity Table panel to define any extracurricular activities that students may participate in and which you need to define for tracking, reporting, recruiting and admission purposes. This table is available for both Admissions and Student Records.

### Panel Name: Extracurricular Activity Tbl

**Navigation:** Manage Student Records → Track Student Careers → Setup → Extracurricular Activity Tbl

The screenshot shows the 'Extracurricular Activity Table' setup screen. At the top, there is a navigation bar with 'Home' and 'Help' links. Below the bar, a breadcrumb trail reads: 'Home > Manage Student Records > Track Student Careers > Setup > Extracurricular Activity Tbl'. A 'New Window' link is also present. The main title 'Extracurricular Activity Table' is displayed. Below the title, the 'SetID' is set to 'CSUNR' and the 'Extracurricular Activity' is set to 'SGOVT'. A table with one row is shown, with columns for 'Description', 'Effective Date', 'Status', and 'Activity Type'. The 'Effective Date' is '01/01/1900' and the 'Status' is 'Active'. The 'Description' is 'Student Government' and the 'Short Description' is 'Student Go'. The 'Activity Type' is 'Student Government'. Below the table, there is a section for 'Activity Offering' with three radio buttons: 'Internal and External', 'Internal' (selected), and 'External'. At the bottom, the 'Extra Activity Primacy' is set to '20'. A footer bar contains buttons for 'Save', 'Return to Search', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

### 1.5.1 Description

Student Records uses the extracurricular activities that are designated as internal for activity tracking. The system prompts you for your Institution's **SetID** and the **Extracurricular Activity code** you want to define. Enter a Description and a Short Description for the extracurricular activity you are setting up.

Select an **Activity Type**. Activity Type values are shipped with your system as translate values. These translate values can be modified if necessary.

Select an **Activity Offering** option to indicate whether the activity is offered by your institution (Internal) or by an external organization (External) or both.

Those activities marked **Internal and External** are available to use in **Admissions and Student Records**. Those activities marked **Internal** are available only in **Student Records**. Those activities marked **External** are available only in **Admissions**.

Enter the Extra Activity Primacy number for this extracurricular activity. This field is typically used by Student Records for internal extracurricular activities. The Consolidate Academic Statistics process uses these primacy values to determine a student's primary extracurricular activity when they are active in



more than one career during an Academic Statistics Period. The system uses this number as a key to determine the student's primary extracurricular activity. The Consolidate Academic Statistics process will report the student's extracurricular activity that has the lowest primacy number.

## Recommendations

### 1.6 Honors/Awards Table

Honors and Awards, both internal and external to your institution, can be stored for prospects, applicants and students. You may define codes for honors and awards such as Dean's List, National Merit Finalist, President's List, Summa Cum Laude, and Valedictorian.

#### Panel name: Honors/Awards Table

**Navigation:** Manage Student Records → Track Student Careers → Setup → Honors/Awards Table

PEOPLE Soft

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Honors/Awards Table

[New Wit](#)

### Honors/Awards Table

Academic Institution: CSUNR Test University

Honor/Award: PRES

**Honors/Awards Detail** View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active

\*Description: President's Award Short Description: Pres Awd

\*Internal/External: Internal

Grantor:

Transcript Level: Official

\*Formal Description: President's Award

Save Return to Search Add Update/Display Include History Correct History

#### 1.6.1 Honors/Awards Detail

**Keep in mind that these honors are non-degree related.** Honors related to a degree are set up in the Degree Honors Table. Specify in the Internal/External field whether this award or honor is internal or external to your institution. **Values for this field are delivered as translate values and should not be changed.** Enter a Grantor if one is associated with this award. Select the Transcript Level for which you would like the Honor/Award to print on types of transcripts: Degr Prog, Not Print, Official, Stdnt Life, or Unofficial. **This field is only available if the Internal/External field is set to Internal.** Transcript Level is hierarchical based upon the two position numeric code in the value column of the translate table. Enter a Formal Description of this honor or award. If you have specified that this award should be printed on the transcript, the Formal Description is what prints.

## Recommendations

### 1.7 Program Action Table

Program Action codes designate the status of a student in a program from the time he or she is an applicant, and throughout their Academic Career. For example, a student must have a Program Action of Matriculate to become a student, and a Program Action of Activate in any term in which they wish to enroll.

#### Panel Name: Program Action Table

**Navigation:** Manage Student Records → Track Student Careers → Setup → Program Action Table

PEOPLE Soft

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Program Action Table [New Window](#)

### Program Action Table

Program Action: ACTV

View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Status: Active + -

\*Description: Activate

Short Description: Activate

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

#### 1.7.1 Program Action Table

**Program Action codes are provided with your system and should not be changed.** You can use the Program Action Table panel to change the effective date and status for the program action codes provided. By changing the Effective Date and Status you can render a program action code as inactive so that it is no longer be available to your users. Remember to insert a new effective dated row if you want to inactive a code in order to maintain the history.

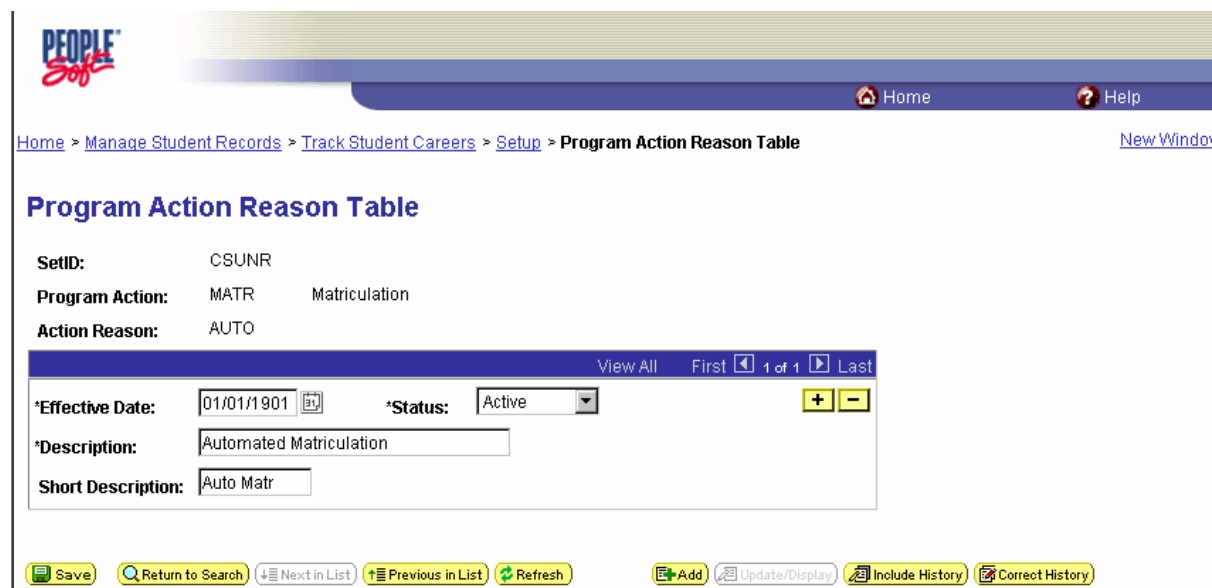
## Recommendations

### 1.8 Program Action Reason Table

Define your reasons for Program Actions in the Program Action Reason Table. You may define multiple reasons for one action. For example, for the action Administrative Withdrawal, you could define a reason of Incomplete Application as well as a reason of No Response. These reasons allow for flexibility with the Program Action codes delivered with your system.

#### Panel Name: Program Action Reason Table

**Navigation:** Manage Student Records → Track Student Careers → Setup → Program Action Table



PEOPLE Safe

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Program Action Reason Table [New Window](#)

### Program Action Reason Table

SetID: CSUNR  
 Program Action: MATR Matriculation  
 Action Reason: AUTO

View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active  
 \*Description: Automated Matriculation  
 Short Description: Auto Matr

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

#### 1.8.1 Program Action Reason Table

Note that this table is shared with Admissions and reasons are also defined here for Admissions - specific program actions. If you want a person's personal data record to be updated with their Date of Death upon taking an Admissions Program Action of Administrative Withdrawal because of death, you must define an Action Reason code of **DENY** or **DISC** under the Program Action Administrative Withdrawal. You may enter any description, but the code must be DENY or DISC in order for the automatic Date of Death update to occur.

#### Recommendations

#### 1.9 Service Table

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.

#### Panel Name: Service Table

Navigation: Manage Student Records → Track Student Careers → Setup → Service Table

Home > [Manage Student Records](#) > [Track Student Careers](#) > [Setup](#) > [Service Table](#) [New Window](#)

### Service Table

**Academic Institution:** CSUNR Test University

**Service Impact:** CENR

Service Details						
*Effective Date	*Status	*Description	Short Description	Positive Service Impact	System Function	
01/01/1901	Active	Block All Enrollment Actvty	Enrl Block	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">+</a> <a href="#">-</a>

[Save](#)
[Return to Search](#)
[Add](#)
[Update/Display](#)
[Include History](#)
[Correct History](#)

### 1.9.1 Service Details

**Service Impact values are shipped with your system as translate values. Student Records delivers 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 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. However it permits the student to drop classes if they already have enrollment activity for the current term.

Select the **Positive Service Impact check box** to indicate services that should be provided to the individual or a special positive property of the student. Turning on the check box indicates that this value represents a positive service, such as allowing a disabled person to enroll early or that a student is a volunteer for a civic function. The Positive Service Impact check box is for informational purposes only.

Select the **System Function check box** to indicate that this service impact is used in a process, such as the enrollment process or transcript production.

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

In the case of class enrollment, you might want to define one Service Impact to permit selected students to enroll in classes without meeting certain enrollment requirements and another Service Impact to restrict students in general from enrolling in classes until requirements are met. For the first one, you would select the Positive Service Impact check box to indicate this is a positive service and to remind you that you must manually apply the Service Indicator containing this impact. For the other, you would select the System Function check box to indicate the Service Indicator containing this impact will be used in a process—in this example, the enrollment process.

### Recommendations

Review all of the service indicators to be established in PeopleSoft with the other modules. Review your campus business process for placing and releasing service indicators. Remember that individual security must be granted for the various service indicators.

## 1.10 Service Indicator Tables

After you have defined the Service Impacts you can use the Service Indicator Table panel to define both positive and negative service indicators, and the reasons for those indicators. Each Service Indicator may be applied with one or more Service Impact codes.

### Panel Name: Service Indicator Tables

**Navigation:** Manage Student Records → Track Student Careers → Setup → Service Indicator Tables

PEOPLE Soft

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Service Indicator Tables [New Wit](#)

Service Indicator Codes Service Indicator Reasons

Academic Institution: CSUNR Test University

Service Indicator Code: ADV

View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active + -

\*Description: Advising

Short Description: Advising ☐ Positive Service Indicator

Default Reason: ☐ Set No Default

View All First 1 of 1 Last

\*Service Impact: IENR Initial Enrl Block - add/drop + -

Term Category: [Dropdown]

Description: [Text Area]

Save Return to Search Add Update/Display Include History Correct History

[Service Indicator Codes](#) | [Service Indicator Reasons](#)

### 1.10.1 Services Indicator Codes

Select the **Positive Service Indicator** option to designate the service indicator you are creating as one which identifies a privilege that can be accorded to a student. For example, you could define a positive service indicator of Conference Guest, define the Service Impact as Front of Line so that any person assigned the conference guest service indicator would receive front of line service, for instance, from the Registrar's Office.

The Default Reason will not display when you are first defining a Service Impact. Service Indicator Reasons are set up on the Service Indicator Reasons panel in the next step. The Default Reason will, however, automatically display when you review the Service Impact in the future.

Select a Service Impact. The Service Impact indicates which service should be limited or extended by the service indicator you are defining.

Select the Term Category for which the service indicator is valid. If no Term Category is selected, this Service Indicator will be valid for all terms. Term Category values are delivered with your system as translate values. These translate values can be modified if necessary.

You can enter a narrative Description of the Service Indicator you are creating for further clarity if you want.

## Recommendations

Review your campus business process for placing and releasing service indicators.

### 1.11 Service Indicator Reason Table

After you have defined Service Impacts and created Service Indicators, you can use the Service Indicator Reason Table panel to define and associate reasons for the service indicators you created. The associated reason for that specific indicator will default into the Service Indicator panel when you go back and review the indicator in the future.

#### Panel Name: Service Ind Reason Table

**Navigation:** Manage Student Records → Track Student Careers → Setup → Service Indicator Tables → Service Indicator Reasons

PEOPLE Soft

Home Help

Home > Manage Student Records > Track Student Careers > Setup > Service Indicator Tables [New Window](#)

Service Indicator Codes Service Indicator Reasons

Academic Institution: CSUNR Test University

View All First 1 of 1 Last

Service Indicator Code: ADV Advising + -

Effective Date: 01/01/1901 Status: Active ☐ Positive Service Indicator

View All First 1 of 1 Last

\*Reason Code: ADVIS ☐ Set As Default + -

\*Description: Advising

Short Description: Advising ☐ Multiples

\*Department: 00001 \*Reference: Dept

Position Number:

Instructions:

Save Return to Search Add Update/Display Include History Correct History

[Service Indicator Codes](#) | [Service Indicator Reasons](#)

#### 1.11.1 Service Indicator Reasons

Enter a **Service Indicator Reason Code**, a Description, and a Short Description for the reason you are defining.

Select the Multiples option to indicate that multiples of this service indicator can be assigned to the same student. An example of this would be parking fines. If a student has many fines, a service indicator could be entered for each fine.

Select the Checklist Control option to indicate that this service indicator can be automatically cleared when its associated checklist item is completed.

You can choose to associate the Service Indicator with a specific department, reference, and position within that department if you want. To do so, select the Department at your institution that is responsible for the service reason you are defining. For example, the Controller's Office might be responsible for a Balance Due reason. Department values are delivered with your system as translate values. These translate values can be modified if necessary.

Select a Reference. The Reference indicates whether the service is referred by a Department, a Department and Instructor, or a Department, Building, and Instructor. Reference values are delivered with your system as translate values. These translate values can be modified if necessary.

Select a Position Number to identify the person or office from which this service indicator originated.

Enter any Instructions having to do with this service indicator reason. This field is most often used to describe what an individual needs to do to remove a negative service indicator from their record.

### **Recommendations**

Have all the modules share with each other what service indicators with their specific impacts will be used in the system. This will facilitate an overall understanding of the business practices among the different areas. Coordinate with the security administrator to grant access to the appropriate staff to place and release whatever service indicators they need to do business.