

# PeopleSoft v9.2 Campus Solutions

## Training and Workshop Agenda

3CS - COMMUNICATIONS, CHECKLISTS AND COMMENTS

ACADEMIC ADVISEMENT

ACADEMIC STRUCTURE

ADMISSIONS APPLICATIONS

CONTRIBUTOR RELATIONS

FINANCIAL AID

STUDENT FINANCIALS

STUDENT ENROLLMENT

STUDENT RECORDS and REGISTRATION

# PeopleSoft Campus Solutions Training Workshop Agenda

## STUDENT FINANCIALS

### Tuition and Fee Calculations Student Financials Foundation

- Tuition and Fees
  - Campus Solution components
  - Set up for calculating tuition, minimum and maximum fees
  - Course fees, criteria, tuition groups and waivers
  - Term and session tables, calendars & scheduling classes
  - Adding & activating students
  - Calculating tuition and fees
  - Transaction and optional fees
  - Self-service miscellaneous purchases
  - Population selection update process
  - Student Financials Self Service
  
- Student Financials Foundation
  - Setting up item types & using keywords to search for item types
  - Securing Student Financials
  - Creating charge priority lists
  - Setting up global invoicing
  - Implementing payment swapping

### Managing Payment Process

- Receivables
  - Posting parameters in business units
  - Workflow notifications
  - Groups types and origins
  - Posting functionality
  
- Financial Aid
  - Manual process of awarding financial aid
  - Passing anticipated aid & disbursing financial aid
  - Global disbursement rules
  - Batch authorization and disbursement
  
- Customer Billing
  - Preparing for billing
  - Payment applier
  
- Service Indicators
  
- Refunds
  - Process & Rules definition
  - Payroll and AP refunding rules
  - Student online and batch refunds

# PeopleSoft Campus Solutions Training Workshop Agenda

## STUDENT ENROLLMENT

### Creating Courses

- Class scheduling
- Dynamic Dating
- Course Requisites
- Class Permissions

### Enrollment Appointments

- Adding and Activating New Students
- Enrolling Students
  - Quick Enroll
  - Enrollment Component
  - Block Enrollment
  - Wait List
- Preparing for New Term

## STUDENT RECORDS & REGISTRATION

### Academic Structure & Student Records, Part 1

- Academic structure foundation
  - Academic groups and careers
  - Academic programs, plans, and sub-plans
  - Terms, sessions & dynamic date rules
- Student Records, **Part 1**
  - Course catalog setup
  - Schedule of classes setup

### Student Records, Part 2 - 4

- Student Records, **Part 2**
  - Dynamic date rules
  - Student Enrollment setup items
  - Program and Term Activating students
  - Enrolling students – Quick Enroll & Block Enroll
- Student Records, **Part 3**
  - Maintenance of a student's program, plan, and sub-plan
  - Student withdrawals and cancellations
  - Grading processes
- Student Records, **Part 4**
  - Academic Transcript processes
  - End-of-Term Processing
  - Graduation process

# PeopleSoft Campus Solutions Training Workshop Agenda

## FINANCIAL AID

### Set up & Managing Data from External Sources

- Financial Aid Year
  - Academic Structure for Financial Aid Processing
  - School Code Setup
  - Processing Defaults & Aid Year Rollover
- ISIR Load Process
  - Preparing Students for Financial Aid Processing
  - Loading ISIR Data into Staging Tables
  - ISIR Corrections Component
  - INAS Simulation
  - Sending ISIR Corrections to CPS
  - ISIR Record Cleanup
- NSLDS Load Process
  - Describing the PROFILE and Need Access Data Load Process
  - Describing Institutional Application Maintenance
- Financial Aid Terms
  - Sources Used to Build Financial Aid Terms
  - Setting Up & Building Financial Aid Terms
- Student Budgets
  - Budget Components & Groups
  - Manual, Online & Background Budget Assignments
- Creating Disbursement Plans and Split Codes

### Financial Aid Packaging & Disbursement

- Financial Aid Item Types
  - Student Financials Setup that Affects Financial Aid
  - Aggregate Aid & Loan Fees
  - Fiscal Item Types
  - Award Messages
- Defining Packaging Plans
  - How to Approach Packaging
  - Equations in Packaging
  - Using Packaging Plans
- Financial Aid Packaging
  - Manually awarding Financial Aid
  - Auto Packaging
  - Professional Judgment Decisions
  - Special Packaging Cases
  - Expiring Anticipated Aid
  - Manipulating Multiple Awards at a Time
  - Setting up Financial Aid Self Service
- Satisfactory Academic Process
  - Setting up SAP
  - Monitoring SAP
- Financial Aid Disbursement
  - Authorization and Disbursement Process
  - Disbursement Rules
  - Running Disbursement for One Student
  - Setting up & Running Batch Disbursement

# PeopleSoft Campus Solutions Training Workshop Agenda

## ADMISSIONS APPLICATIONS WEB SERVICES

### Admissions Applications

- Admission Applications Web Services (AAWS)
  - Web service operations provided with AAWS
  - Staging tables in Campus Solutions
  - Difference between applicant and administrator modes
- AAWS Setup
  - Applicant and Constituent Data Entities & Entity Registry
  - Set up Data Update Rules
  - Review Search/Match
  - Complete the Application Configuration
- Extending the Application
  - Describe Extensions
  - Setup Attachments
  - Create a List of Values
- Application Creation and Update
  - Create a new user account & application as an applicant
  - Update an application as an applicant
  - Submit admission application attachments as an applicant
  - 3C Trigger Table
  - Constituent and applicant data submitted through the sample application
- Batch Application Processing
  - Bulk loading process using AAWS
  - Setup the file parser process
  - Load an application file through the file parser
  - Manage the transaction management process

# PeopleSoft Campus Solutions Training Workshop Agenda

## ACADEMIC ADVISEMENT FUNDAMENTALS

### Academic Advisement

- Academic Advisement Overview
  - Describing Integration with Other PeopleSoft and Third-Party Products and Systems
  - Describing Implementation Resources
- Concepts Used in Academic Advisement
  - How Academic Structure Is Used
  - Diagramming Degree Requirements
  - Set Up Your Rules
  - Order for Building Degree Requirements
  - How Math Functions Are Used
  - How Connector Types Are Used
  - User Defaults
- Managing Advisement Reports
  - Optional Advisement Data
  - Advisement Report Type
  - Creating Advisement Reports for Individual Students & in Batch
  - Purging Academic Advisement Reports
- Academic Advisement Self Service
  - Description & Set up
  - Updating Self-Service Advisement Reports
- Defining Course Lists
  - How Course Lists Are Used in Academic Advisement
  - Setting Up a Course List
- Defining Academic Requirements
  - Describing & Defining Academic Requirements
  - Requirement Parameters & Line Types
  - Defining Requirement Line Item Parameters & Detail
- Academic Requirement Groups
  - Group Page
  - Parameters & Line Types
  - Detail Parameters
  - Other Required Plans
  - Appending Plans to a Requirement Group
- Managing the Program Guide Feature
- Advisement Rule Tracking Reports
  - Types of Reports Used in Academic Advisement
  - Advisement Summary Pages
  - Advisement Group Summary Report
  - Requirement Advisement Report
  - Generating a Reverse Engineering Report
  - Entity Groups and Condition Table Reports
- Expanded Conditions
  - Use of Preconditions and Conditions
  - Creating an Entity Group and Using It in a Degree Requirement
  - Defining a Dynamic Condition and Using It in a Degree Requirement
  - Custom Condition
- Making Exceptions and Overrides
  - Substituting Courses
  - Authorize Student Exceptions Component
  - How to Waive Rules & Change Parameters
  - How to Exclude Courses
  - Student Individualized Plan

# PeopleSoft Campus Solutions Training Workshop Agenda

## CONTRIBUTOR RELATIONS

### Constituent Information & Initiatives

- Constituent Information
  - Constituent Records
  - Entering and Tracking Person & Organization Data
  - Establishing Relationships
- Initiatives
  - Staff, Volunteer, and Unit Roles
  - Other Supporting Information for Initiatives
- Audiences
- Campaigns
  - Appeals & Actions
  - Tracking Campaign Details
  - Campaign Budgets
- Volunteers
  - Volunteer Structure
  - Volunteer Tasks and Roles
  - Viewing a Volunteer's Previous Involvement
- Events
  - Events and Associated Meetings
  - Events in Conjunction with the 3Cs
  - CR Events
- Prospects
  - Assigning Resources to Prospects
  - Managing Prospect Strategies & Actions
  - Planned Giving Prospects

### Gifts, Memberships & Payment Processing

- Major Gifts & Pledges
  - Commitment Entry
  - Working with Sessions
  - Matching Gifts, Pledges and Conditional Pledges
  - Queuing and Posting Sessions
  - Adjustments
  - Self-Service Involvement
  - Giving Clubs
- Memberships
  - Membership Programs & Initiatives
  - Member Dues
  - Assigning Members to a Member Organization
- Managing Business Units and SetIDs in Contributor Relations
  - Managing & Securing BUs
  - SetIDs and TableSets
- Acknowledgements
  - Acknowledgements in CR
  - Acknowledgement Rules
  - Processing Acknowledgements
  - Generating Letters
- Processing Credit Card Transactions
  - Self-Service Credit Card Transactions
  - Processing Online Credit Card and Membership Payments

# PeopleSoft Campus Solutions Training Workshop Agenda

## ACADEMIC STRUCTURE

### Academic Structure

- System Level Data
  - Identifying Academic Institutions, Record Groups, and tableset IDs
  - Determining Academic Institutions and Setup Options
  - Define Establishments, Locations and Campuses
  - Set Up Buildings and Facilities
- Institution Level Data
  - Grading Schemes
  - Repeat Schemes
- Academic Groups, Careers, and Catalog Data
  - Defining Academic Groups & Careers
  - Unit Types and Conversion Rules
  - Career Pointers and Exception Rules
  - Repeat Checking Rules
  - Holiday Schedule Values
  - Instructors and Advisors
- Academic Programs, Plans, and Subplans
  - Academic Calendar
  - Enrollment Action Reasons
  - Academic Level and Load Rules
  - Academic Programs
- Academic Terms and Sessions
  - Term Values & Time Periods
  - Academic Terms and Sessions
  - Dynamic Dating Process
- Academic Organizations
  - Tree Manager
  - Academic Groups & Organizations
  - Assigning User Security to Academic Organizations
  - Academic Subjects
- Security
  - Describing User Profiles, Roles and Permission Lists
  - Describing Academic Structure Security
  - Describing Component Specific Security
  - Describing User Based Security Interactions
  - Securing PeopleSoft Applications



# PeopleSoft Campus Solutions Training Workshop Agenda

## 3CS - COMMUNICATIONS, CHECKLISTS AND COMMENTS

### 3 Cs Overview

- 3Cs Business Process
  - PeopleSoft Products that Use 3Cs
- Establishing 3C Security
  - Security Requirements and Building Blocks
  - Setting Up & Assigning 3C Security
- Managing Communications
  - Building Blocks
  - Communications 3C Security
  - Speed Keys
  - Creating and Assigning Communications Manually
- Communication Generation Process
  - Running the Process
  - Retrieving and Viewing Generated Communications
- Resetting Generated Communications
- Managing Checklists
  - Building Blocks
  - Checklists 3C Security
  - Manually Assigning Checklists
  - Updating Checklists
  - Tracking Groups
- Managing Comments
  - Building Blocks
  - Comments 3C Security
  - Viewing and Changing Comments
  - Entering Comments Manually
- Assigning 3Cs Automatically Using the PeopleSoft 3C Engine
  - Understanding the 3C Engine Process Flow
  - Setting Up the 3C Engine
  - Using System Real-time Processing
  - Using Batch Processing
  - Understanding the Relationship Between PeopleSoft Mass Change and the 3C Engine