Chapter: Managing PeopleSoft Admission Transactions

This Recruiting and Admissions PeopleBook chapter provides overviews of admission transactions and discusses:

- Entity Registry and admission transactions.
- Configuring admission application transactions.
- Reviewing and editing staged admission application transactions.

Note. The chapter was first released for Campus Solutions 9.0 Feature Pack 3 (July, 2010). Since then the chapter has been updated for various bundles. For Bundle 23, this chapter was reorganized and some of the content was moved to the "Working with Constituent Transaction Management" chapter. Also, note that the Campus Solutions PeopleBook chapters listed under the following See Also heading may get updated with future bundle releases.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook, “Setting Up Entity Registry" which was posted to My Oracle Support as part of the Campus Community documentation updates for Bundle 27.

PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook, “Setting Up List of Values" which was posted to My Oracle Support as part of the Campus Community documentation updates for Bundle 22.

PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook, “Working with Constituent Transaction Management". The latest version of the chapter was posted to My Oracle Support as part of the Campus Community documentation updates for Bundle 27.

PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook, “Using Admission Applications Web Services". The latest version of the chapter was posted to My Oracle Support as part of the Recruiting and Admissions documentation updates for Bundle 27.

PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook, "Using File Parser for Loading Applications". The latest version of the chapter was posted to My Oracle Support as part of the Recruiting and Admissions documentation updates for Bundle 24.

PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook, “Using the File Parser Process". The latest version of the chapter was posted to My Oracle Support as part of the Campus Community documentation updates for Bundle 24.

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Understanding Admission Transactions

Admission transactions use the delivered Admission Applications Web Services (AAWS) and the File Parser bulk loading of admission applications features. The features are fully integrated with the Constituent Transaction Management (CTM) framework (admission transactions are consumers of the CTM framework). Each admission transaction you set up is considered a CTM transaction. CTM generates an admission transaction when:

- An applicant or administrator uses an online admission application to create, save or submit an application through AAWS (*online transaction*).
- You use the File Parser utility to load applications from an external file (*offline transaction*).

An admissions online or offline transaction includes both the constituent and application data.

Constituent data may include person data or data that is considered as not associated with the application. Examples of constituent data include Name, Gender, Address, and Email. Examples of application data include Academic Program, Admit Term, and Academic History.

When a transaction is generated, the system uses Search/Match to look for constituent data in your production environment (based on the Search/Match parameters) that matches the constituent data in the transaction. Each defined transaction can have its own Search/Match setup. You can therefore determine the rules for creating a new ID, updating an existing ID, suspending or ignoring a record. The system stores the constituent and application data in staging tables. If there are errors or if Search/Match determines that the incoming constituent record should be suspended or ignored, use the Constituent Staging and Application Transactions components to correct the admissions transaction data. You can post transactions individually or by batch to the Campus Solutions database.

The following diagram shows the admission transactions flow:

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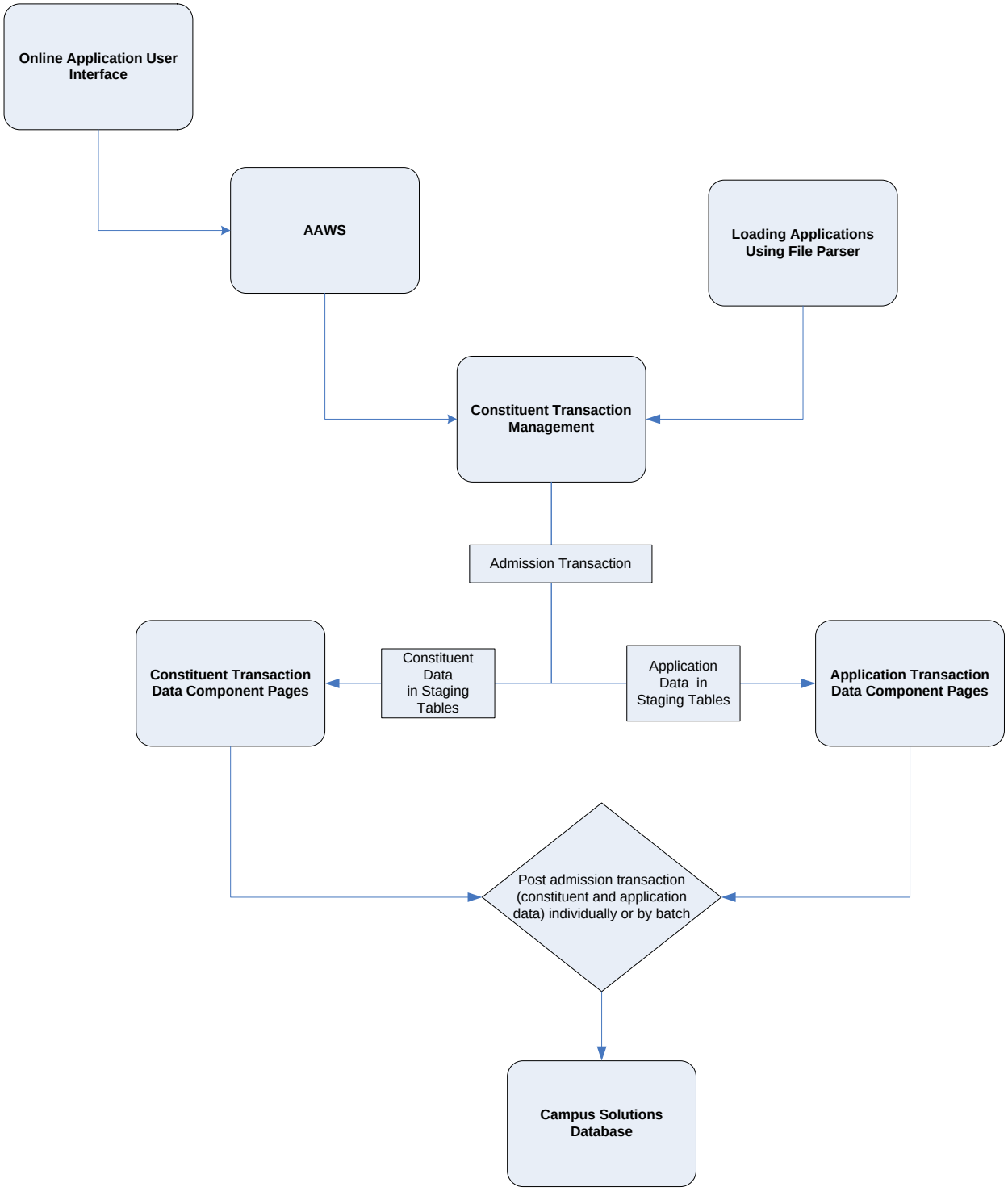

Admission Transactions Flow

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CRM for Higher Ed EIPs and Admission Transactions

Enterprise Integration Points (EIPs) enable your institution to exchange data between CS and CRM. EIPs publish data either whenever data updating happens for the given entities of the EIPs or when the user requests data. This data can be created, updated, or deleted through various channels like components, component interfaces, and batch processes.

The system publishes the following EIPs when an application that is submitted through AAWS or File Parser process is posted:

• SAD_ADM_PRSPCT_DATA_SYNC

• SAD_ADM_APPL_DATA_SYNC

• SAD_TEST_SCORES_SYNC

• SAD_ADM_INTEREST_SYNC

• SSR_EXTRACUR_ACTVTY_SYNC

• SAD_EXT_ACAD_DATA_SYNC

• SCC_PERSON_SYNC

The system can publish SAD_ADM_PRSPCT_DATA_SYNC when the system creates a prospect record for a saved or posted application. You use the Prospect Setup page to indicate when (upon save or post) the system should create a prospect record. The Prospect Setup page is discussed in the “Setting Up Prospect Creation Rules and Defaults” section of this chapter.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook, “Introducing Customer Relationship Management for Higher Education”

CRM for Higher Education Developer’s Guide

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Understanding Admission Transactions Setups

You define admission transactions using CTM pages. Then, you use the Application Configuration component to configure the admission transactions.

Setting Up CTM (Defining Transactions and Data Update Rules) and Configuring the Admission Transactions (Application Configuration component)

[[**Bundle 27**: This topic has been updated due to the New User Registration framework enhancements.

The New User Registration CTM transaction that the system delivers is renamed from ADMISSIONS_REGISTRATION to NEW_USER_REGISTRATION.]]

Before you deploy AAWS or start loading the applications, you must define the admission transactions through the CTM setup pages. For AAWS, define a transaction for the online application that a user saves or submits through the Save Application or Submit Application service operations. If you want to load admission applications using the PeopleSoft File Parser utility, define an offline transaction for the batch load.

The default transaction definition for AAWS that is delivered with the system is: ADMISSIONS_APPLICATION (online application transaction).

Additionally, if you have defined an online transaction for the online application, consider using the New User Registration framework to allow a guest or a returning user to access your system. The framework delivers a sample login page that contains all the security objects delivered as part of the framework. The New User Registration framework is also a consumer of the CTM framework and delivered with your system is the CTM transaction code called NEW_USER_REGISTRATION. The New User Registration framework, using the New User Registration Context, can also transfer the newly authenticated user to the self-service page you created for your online application.

See *PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook*, “Working with Constituent Transaction Management," New User Registration and CTM.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Using New User Registration Framework. This chapter was released as part of the Campus Community Bundle 27 documentation updates.

Warning! The ADMISSIONS_APPLICATION transaction is delivered only as a reference. It is not required that you use this transaction.

The following table lists the delivered transaction handler values for ADMISSIONS_APPLICATION. Do not change these values. Also use these values when defining a transaction handler for any new application transaction you may define.

Root Package ID	Path	Application Class ID
SCC_OLA	TRANSACTION	AdmissionTransaction

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The staging record delivered with ADMISSIONS_APPLICATION is SAD_APL_DAT_STG. This record stores the transaction status and transaction status date value for ADMISSIONS_APPLICATION. Do not change this value. You should always use this value when defining any new application transaction you may define.

The following table lists the delivered Transaction Data Launch View settings for ADMISSIONS_APPLICATION transaction. You should always use these values when defining the transaction data launch view settings for any new application transaction you may create.

Menu Name	**Menu Bar Name**	**Menu Item Name**	**Menu Page Name**
Process Applications	Use	SAD_APPL_STG	SAD_APPL_STG

Academic institutions require different rules for updating constituent and application data based on a transaction and the affiliation the institution has with the constituent. For example, you may have a graduate online application rule where you want to update the constituent's home email address in your database with the value from a submitted graduate application. On the other hand, you may have a graduate application load rule where you do not want to update an existing home email address value when you use File Parser to load graduate applications into Campus Solutions. Additionally, you may want to override this graduate application load rule if the constituent is a prospect. The Data Update Rule Entry component allows this flexibility. The system uses these rules when it posts a transaction.

While you can use the same AAWS online user interface for all your academic careers and institutions, you can configure the admission transactions to behave differently. For AAWS and bulk load using File Parser, different admission transactions may have different Search/Match settings and data update rules. For instance, an academic institution might allow undergraduate applicants to update their passport details when submitting an online application. Conversely, the institution might not want to allow graduate applicants to update their passport details if that data is already on the system. You can associate the two different data update rules to these two separate transactions. Both these transactions may or may not have different Search/Match settings.

When establishing transactions, a single transaction for each institution and career combination could be defined in CTM. In this way, you can accommodate online applications for different careers (Examples: Undergraduate, Graduate, Graduation Business) which may have different Search/Match requirements, data update rules, or intended methods of processing. After defining the admission CTM transactions, use the Application Configuration component to set up different combinations of institutions and careers and map each institution-career combination to a defined admission transaction (CTM Transaction Code).

It is typical for administrators to enter the admissions application data for an applicant. It is possible for an administrator to use the same online application to do so, as long as the application user interface is constructed to distinguish between an administrator log in and a self service applicant log in.

Administrators can use a different institution-developed user interface designed for *quick* data entry. The same transaction value applied to the self service application is utilized for the institution/career combination for which the application is being created.

Use the Transaction Setup component to define a transaction, associate a data update rule with the transaction, and define the Search/Match setting for the transaction.

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CTM Data Updates Rules specific to admission transactions

To be consistent with existing processes that update this data, the application data update rules are as follows for the following entities:

Entity	Rules
Academic Interests	If data exists on ADM_INTRST_HDR for an existing EMPLID and ACAD_CAREER and the max ADM_INTRST_HDR.EFFDT is not equal to %Date, a new row is inserted with EFFDT = %Date. Rows are inserted into ADM_INTERESTS for each academic interest populated on SCC_STG_ADMINT. PRIORITY is populated based on ADM_INTRST_HDR.USE_PRIORITY. If data exists on ADM_INTRST_HDR for an existing EMPLID and ACAD_CAREER and the max ADM_INTRST_HDR.EFFDT is equal to %Date, a row is not inserted into ADM_INTRST_HDR. Rows will be inserted into ADM_INTERESTS only where SCC_STG_ADMINT.EXT_SUBJECT_AREA does not exist on ADM_INTERESTS for the current effective date. If ADM_INTRST_HDR.USE_PRIORITY is 'Y', the max ADM_INTEREST.PRIORITY is determined and incremented to the next number when new rows are inserted.
External Academic Data	A new Data Number (EXT_DATA_NBR) is inserted to EXT_ACAD_DATA if the EXT_ORG_ID on the staging record SCC_STG_ACADHST exists on the core record ACAD_HISTORY. The max EXT_DATA_NBR existing on EXT_ACAD_DATA is determined and incremented to the next number on insert. All child records are populated with the same EXT_DATA_NBR that is inserted on EXT_ACAD_DATA if the field exists on the child record. Exception: For the record EXT_DEGREE, if data exists on EXT_DEGREE where DESCR, DEGREE_DT, DEGREE_STATUS and LS_DATA_SOURCE = data from staging record (SCC_STG_EXTDEGR), a new row is not inserted.

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Entity	Rules
General Materials	A new record is always inserted. The max GENL_MATL_NBR is determined and new incremented to the next number when new rows are inserted.
Residency Official and Residency Appeal	If the keys (INSTITUTION, ACAD_CAREER and EFFECTIVE_TERM) do not exist on RESIDENCY_OFF or RESIDENCY_APEAL, a new row is inserted. If the keys exist, a new row is not inserted and the data is not updated.
Residency Self (Self Reported Residency)	If Date Reported (SCC_STG_RES_SLF.SELF_REPORT_DT) does not exists on RESIDENCY_SELF, a new row is inserted. If Date Reported (SCC_STG_RES_SLF.SELF_REPORT_DT) exists, a new row is not inserted and the data is not updated.
Test Score	If SCC_STG_TEST.TEST_ID does not exist on STDNT_TEST for the EMPLID, a new row is inserted along with any child rows (STDNT_TEST_COMP). If the following elements on STDNT_TEST_COMP match the elements on the staging record SCC_STG_TESTCMP, update Score, Percentile and Date Loaded regardless of the previous score reported: EMPLID, TEST_ID, TEST_COMP, TEST_DT and DATA_SOURCE. If there is not an existing row on STDNT_TEST_COMP that matches on EMPLID, TEST_ID, TEST_COMP, TEST_DT, DATA_SOURCE, a new row is inserted.

How the system attaches an application to a defined transaction

Applications typically vary among institutions and academic careers. Use the Appl Config page in the Application Configuration component to map an institution and career to a transaction. The system uses this mapping to identify which transaction definition to use when it receives an application through AAWS.

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For example, suppose you have defined two transactions: UG Transaction for undergraduate applications and Grad Transaction for graduate applications. When an applicant submits an undergraduate application, the system looks at the Appl Config page settings to determine that it needs to use the UG Transaction.

For offline transactions, you must enter the transaction code as a default value for the file mapping definition (Campus Community File Parser setup). The system uses this mapping to identify which transaction definition to use when it receives an application through the File Parser.

Understanding Staged Admission Transactions Processing

Use the Constituent Staging and Application Transactions components to review or edit the admissions transaction data stored in the staging tables. In addition, you can use these components to post the staged transactions into the production records of the Campus Solutions database.

A constituent in an admission transaction is the person record (applicant). Use the Constituent Staging component to handle the constituent data. The Constituent Staging component is a Campus Community CTM component. Use the Application Transactions component to handle the admissions application transaction data. To help you review the staged data using both the components for a particular Temporary ID, the components display a link that helps you navigate from one component to the other.

Correcting Admission Transaction Errors

An admission transaction might have an error status for the constituent (person) or the application record. For error indicators, use both the components to find the corresponding field and enter a valid value.

Use the Constituent Staging component to review and correct the constituent errors.

Use the Application Transactions component to review and correct the application errors.

Note: For File Parser, only after the CTM Transaction Management process runs, any errors will appear in the components. In the case of AAWS, errors can appear either when the user saves or submits an admission application.

An example of an error message that the Application Transactions staging component displays: Suppose you selected the Manual Reconciliation option for Home Schools on the School Setup page. If the applicant has indicated that a school of attendance is a *home school* and submitted the application, the Application Transactions component displays an error message.

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Application Data | Education History | Additional Academic Info | Supplemental Information

Temporary ID: 79
User ID: SSADM215B
Created Datetime: 11/10/2011 10:52AM
Created By: SSADM215B
Constituent Staging

Name: Riley, Ramirez
Constituent Status: Error
ID:
Run Search/Match/Post

*Institution: PeopleSoft University
Application Nbr: 00024910
Application Status: Submitted

Academic Career: Undergraduate Engineering
Application Status Date: 11/10/2011
Expand All | Collapse All

Application Errors — Personalize | Find | View All | First 1 of 1 Last

	Message Sequence	Message Set Number	Message Number	Error Description	Message Severity	Process Instance
1	1	14098	151	Reconcile error: Select a value for EXT_ORG_ID	Reconcile Error	3344

Program Data — Find | View All First 1 of 1 Last

Program Number: 0
*Admit Term: 0680 2012 Spr
*Academic Program: UENG Undergraduate Engineering
Last Updated On: 11/10/2011 10:52:12AM

Exp. Graduation Term:
*Academic Load: Full-Time
*Campus: MAIN Main
Last Updated By: SSADM215B

Example of an error message in the Application Transactions component

To resolve such an error, you can click the Education History tab, then select the valid external organization ID for the home-schooled applicant and finally click the Save button.

Posting Admission Transactions

After you have reviewed a transaction and corrected the errors, you can run the search/match/post process from the components itself by clicking the Run Search/Match/Post button. On clicking this button, you can run both processes at once: to search for matching people in your database and to post the transaction according to the Search/Match parameters you set up on the Transaction Setup component. The latter happens if Search/Match identifies an ID that needs to be created or updated or if the applicant was a returning user and used a User ID already tied to an ID. In either way, the system uses the identified ID (EMPLID) to post the data. Alternatively, you can use the Constituent Staging and Application Transactions components to correct multiple transactions and then run the Transaction Management process to post the multiple transactions to the Campus Solutions database.

To process transactions in batch, use the Transaction Management process. If you had defined your admission transaction as either *offline* or *online* with the Process Search/Match option set to *Batch*, use the Transaction Management batch process to process these transactions. However, if the system knows the EMPLID for the applicant, then the transaction is effectively treated as *realtime*. The Transaction Management Process component offers different options on how you can process one, all or only a certain set of transactions. For processing a certain set of transactions, Population Selection can be used.

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Entity Registry and Admission Transactions

You can add new entities or extend existing entities. For example, an academic institution has a requirement to add one or more new entities into the application process. The new entity could represent entirely new data or it could represent an extension to one of the existing delivered entity data types. This may involve either or both application and constituent data. You can use the Entity Registry feature for all these situations.

The web service operations that are part of the AAWS feature are constructed based on entities.

The entities for all core data records within the constituent and application areas needed for admission transactions are delivered with the system within the Entity Registry component. You can extend any of these entities or create new ones. Register new institution-specific extension entities as children to any entity in the registry. If you need to create new entities, because AAWS and File Parser admission transactions are CTM transactions and therefore use stage and production records, the entity you create must be set with an entity type that allows for stage records and production records. For instance, use entity type called *Staged Entity.* The stage and production records need to exist prior to creating the new entity.

All Recruiting and Admissions entities are represented by the IEntity interface *SAD_ADM_APPL:Accessors:IEntity*. The IEntity interface defines the core behavior that any participating entity needs to support in order to be managed by Recruiting and Admissions. For each new distinct entity that you want to create for Recruiting and Admissions, an application class implementing the IEntity interface needs to be created and registered.

See *PeopleSoft Enterprise Campus Community Fundamentals 9.0 PeopleBook*, Setting Up Entity Registry, "Creating a New Entity" for instructions on creating and extending entities.

Example of a scenario of when you can use the Entity Registry feature for Recruiting and Admissions: Suppose an online application has a list of questions. The Campus Solutions data structure does not support capturing the answers to these questions. In such a case, you can create a Questions and Answers entity.

The Questions and Answers application extension entity is registered as a child entity to the Application entity on the Entity Registry page:

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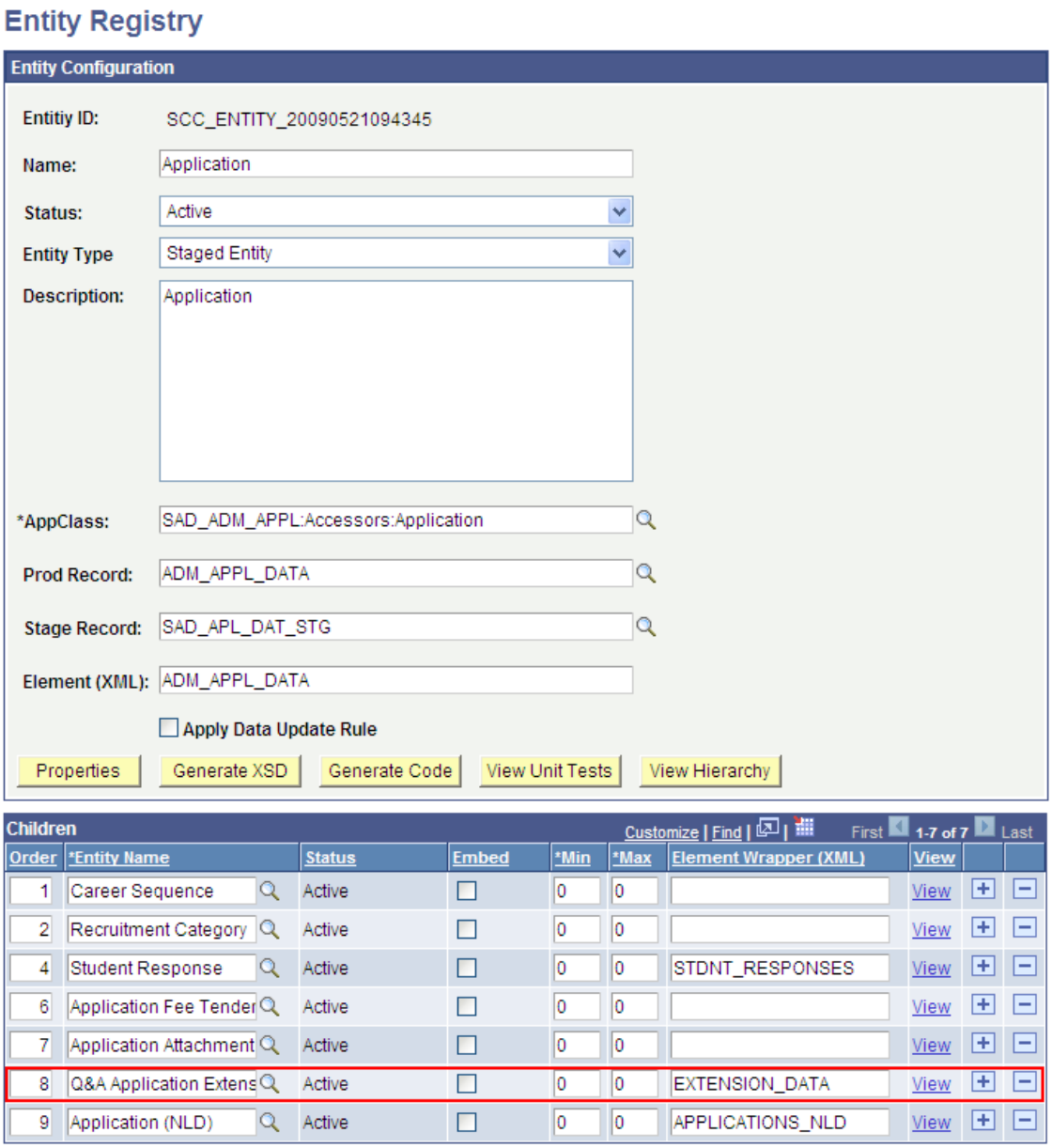

Example of an Entity Registry page

Delivered entities related to admissions data

At the time of delivering this document, the following entities are delivered for the application staging records and matching production records:

Entity Name	Staging Record Names	Production Record Names
Application	SAD_APL_DAT_STG	ADM_APPL_DATA
Career Sequence	SAD_APP_CSQ_STG	ADM_APP_CAR_SEQ
Academic Program	SAD_APL_PRG_STG	ADM_APPL_PROG
Academic Plan	SAD_APL_PLN_STG	ADM_APPL_PLAN
Academic Sub-Plan	SAD_APL_SBP_STG	ADM_APPL_SBPLAN

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Entity Name	Staging Record Names	Production Record Names
Academic Program (AUS)	SAD_APPRGAU_STG	SAD_APL_PRG_AUS
Academic Program (NLD)	SAD_STDAPNL_STG	SAD_STD_APP_NLD
Academic Program (NZL)	SAD_PRGNZL_STG	SAD_APL_PRG_NZL
Student Education (NLD)	SAD_EDU_NLD_STG	SAD_STD_EDU_NLD
Recruitment Category	SAD_APL_RCC_STG	ADM_APPL_RCR_CA
Recruiter	SAD_APL_REC_STG	ADM_APPL_RCTER
Student Response	SAD_STG_STDRESP	STDNT_RESPONSE
Application Fee Tender	SAD_APL_TND_STG	ADM_APPL_TENDER
Application Attachment	SAD_APLATCH_STG	SAD_APPL_ATCH
Application (NLD)	SAD_APP_NLD_STG	SAD_APP_DAT_NLD
Q&A Application Extension (Example Only)	SCC_EXTN_STG	SCC_EXTN
Other Schools Applied	SAD_STG_OTH_SCH	SAD_OTHER_SCH
Source Of Interest	SAD_STG_SOI	SAD_SOI
Research Candidate	SSR_RS_CAND_STG	SSR_RS_CANDIDAT
Research Candidate Header	SSR_RS_CNDH_STG	SSR_RS_CAND_HDR
Research Consumption	SSR_RS_CNSP_STG	SSR_RS_CONSMPTN
Research Topic Header	SSR_RS_TPCH_STG	SSR_RS_TOPC_HDR
Research Topic Detail	SSR_RS_TOPC_STG	SSR_RS_TOPIC
Research Topic Attachment	SSR_RS_TPAT_STG	SSR_RS_TOPC_ATT
Research Supervisor Header	SSR_RS_SUPH_STG	SSR_RS_SUPR_HDR
Research Supervisor	SSR_RS_SUPR_STG	SSR_RS_SUPRVSRS
Research Supervisor Attachment	SSR_RS_SPAT_STG	SSR_RS_SUPR_ATT
Research Assignment Header	SSR_RS_OTRQ_STG	SSR_RS_OTHR_REQ
Research Assignment Detail	SSR_RS_OTRD_STG	SSR_RS_OTHRQDTL
Research Assignment Attachment	SSR_RS_OTAT_STG	SSR_RS_OTHR_ATT
Research Candidate Messages	SSR_RS_MSGS_STG	SSR_RS_MSGS
Research Candidate Attachment	SSR_RS_CDAT_STG	SSR_RS_CAND_ATT

Configuring Admission Transactions

To configure the admission transactions, use the Application Configuration component (SAD_ADM_APL_CONFIG).

This section discusses how to:

- Map online application transactions to academic careers.
- Set up application defaults for offline and online application transactions.
- Set up prospect creation rules and defaults for offline and online application transactions.
- Set up home or unlisted schools for online application transactions.

Pages Used to Configure Admission Transactions

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Page Name	Definition Name	Navigation	Usage
Appl Config	SAD_TRANSAC_MAP	Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, Appl Config	Map online application transactions to academic careers.
Application Setup	SAD_APL_CNT	Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, Application Setup	Define how the system should assign an application center and optionally assign 3Cs to an application by defining which Event ID should be used in the processing. The system uses this setup when you use File Parser to load applications in batch via a calculated field or when the user saves or submits an application through AAWS.
Prospect Setup	SAD_PRS_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, Prospect Setup	Define how the system should create a prospect record, and if a prospect record is created, how to assign default values to the prospect record. The system uses this setup when you use File Parser to process applications in batch via a calculated field or when the user saves or submits an application through AAWS.
School Setup	SAD_AWS_SCH_DFL	Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, School Setup	Define how the system should process unlisted or home schools. The system uses this setup only when the user saves or submits an application through AAWS.

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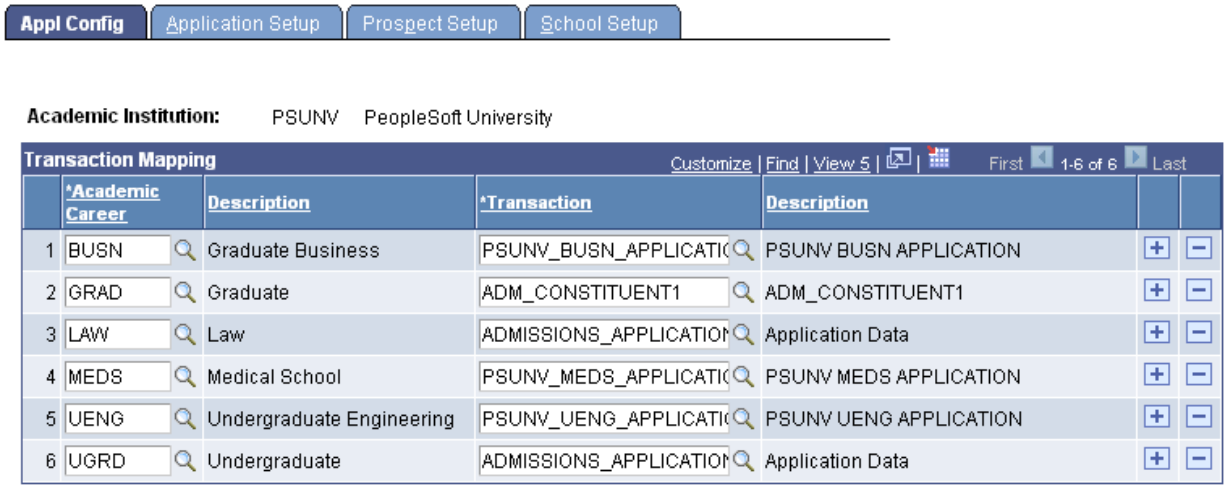
Mapping Online Application Transactions to Academic Careers

Access the Appl Config page (Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, Appl Config).



Appl Config page

You can enter only online transactions (except for the user registration transaction NEW_USER_REGISTRATION) in the Transaction field. To check whether a transaction has been marked as online or offline, use the Transaction Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup).

Ensure that all academic careers for AAWS applications are mapped to a valid transaction on the Appl Config page.

When a user saves or submits an application through AAWS, the Campus Solutions system uses the Appl Config page to associate the application with a *CTM* online transaction. The system uses this association to run search/match and process the application data according to the settings on the Transaction Setup page.

Setting Up Application Defaults for Offline and Online Application Transactions

Access the Application Setup page (Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, Application Setup).

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Appl Config | **Application Setup** | Prospect Setup | School Setup

Academic Institution: PSUNV PeopleSoft University

Application Setup Customize | Find | View 10 | First 1-18 of 18 Last

Criteria | Assigned Values

	*Career	Description	Program	Description	Plan	Description	Country	Citizenship Status
1	BUSN	Graduate Business						
2	GRAD	Graduate						
3	GRAD	Graduate					CAN	Canadian Citize
4	GRAD	Graduate					USA	Native
5	GRAD	Graduate					USA	Alien Permaner
6	GRAD	Graduate					USA	Permanent Res
7	GRAD	Graduate					USA	Canadian Citize
8	LAW	Law						
9	MEDS	Medical School						
10	UENG	Undergraduate Engineering						

Application Setup page: Criteria tab (1 of 2)

11	UGRD	Undergraduate						
12	UGRD	Undergraduate	AA	Associate of Arts	COMPSCI	Computer Science		
13	UGRD	Undergraduate	AA	Associate of Arts	MUSIC	Music Performance (BFA)		
14	UGRD	Undergraduate	FAU	Fine Arts Undergraduate				
15	UGRD	Undergraduate	FAU	Fine Arts Undergraduate	DANCE	Dance (BFA)		
16	UGRD	Undergraduate	FAU	Fine Arts Undergraduate	MUSIC	Music Performance (BFA)		
17	UGRD	Undergraduate	LAU	Liberal Arts Undergraduate				
18	UGRD	Undergraduate	LAU	Liberal Arts Undergraduate	PSYCH	Psychology		

Application Setup page: Criteria tab (2 of 2)

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Appl Config | **Application Setup** | Prospect Setup | School Setup

Academic Institution: PSUNV PeopleSoft University

Application Setup Customize | Find | View 10 | First 1-18 of 18 Last

Criteria | **Assigned Values**

	*Application Center	Description	Event ID	Description
1	BUSN	Business School		
2	APP3	Application Center 3		
3	APP2	Application Center 2		
4	GRAD	Graduate Admissions		
5	GRAD	Graduate Admissions		
6	APP2	Application Center 2		
7	GRAD	Graduate Admissions		
8	LAW	Law School		
9	MEDS	Medical School		
10	UENG	Undergraduate Engineering		

Application Setup page: Assigned Values tab (1 of 2)

11	UGRD	Undergraduate	AD_ADMA	Admissions ADMA
12	APP3	Application Center 3		
13	APP2	Application Center 2		
14	APP1	Application Center 1		
15	APP2	Application Center 2		
16	APP3	Application Center 3		
17	APP1	Application Center 1	AD_ADMP	Admissions ADMP
18	APP2	Application Center 2		

Application Setup page: Assigned Values tab (2 of 2)

Ensure that all the academic career, program, and plan combinations for AAWS and File Parser applications are mapped to a valid application center on the Application Setup page.

Use the Criteria tab to define the selecting criteria — such as academic career, academic program, and academic plan — that will constitute a particular group of applications. Use the Assigned Values tab to define the application center and event ID that the system assigns to the particular application group. When the system receives an online application, it uses this mapping to determine which application center and event ID should be assigned to an application. For batch applications loaded through File Parser, a calculated field can be built on the File Mapping Definition to look at this setup to determine the application center to populate.

In the exhibit example — *Application Setup page: Criteria tab (2 of 2)* — you can see that for row 13, career is *UGRD*, program is *AA* and plan is *Music*. For the same row, in the exhibit example —

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Application Setup page: Assigned Values tab (2 of 2) — the application center is *APP2*. Assume that the system receives an application for a career of UGRD, program of AA, and plan of Music through AAWS or batch load. In such a case, the system assigns *APP2* to this application.

The system requires an application center to create an admission application. Therefore, you must map each career with an application center on the Application Setup page. The system generates an error message if it receives an application through AAWS or batch load and it does not find the corresponding application center from this mapping. You can view this error message on the Application Transactions staging component. Note that the system assigns an application center from this mapping when an application is saved or submitted. The system assigns the 3C Event ID when an application is posted.

Note. You should complete this mapping for only Self-Service (applicant) mode. In the Administrator mode, the user provides the application center when creating an admission application. Therefore, this setup is not relevant for Administrator mode.

Criteria

Career

Enter the career for which you want to assign an application center (and optionally, an event ID).

Program

Optionally, enter the program for which you want to assign an application center (and optionally, an event ID).

If you leave this field blank, the system assigns the application center to all the programs within the career. For example, suppose you have two application centers: *APP01* and *APP02*. Map the career *GRAD* and program *MBA* combination to the *APP01* application center and map the *GRAD* career to the *APP02* application center. In such a case, the system will assign *APP01* application center to an MBA application and it will assign *APP02* to other non MBA applications such as a MS or MA application.

Plan

Optionally, if you have entered a program, enter the plan for which you want to assign an application center (and optionally, an event ID).

If you leave this field blank, the system assigns the application center to all the plans within the program. For example, suppose you have two application centers: *APP03* and *APP04*. Map the career *GRAD*, program *MS*, and plan *Finance* combination to the *APP03* application center and map the *GRAD* career and *MS* program to *APP04* application center. In such a case, the system will assign *APP03* application center to an MS Finance application and it will assign *APP04* to other Master of Science applications such as MS in Biochemistry or MS in Physics.

Country and **Citizenship Status**

Enter the country and citizenship if you want to assign an application center (and optionally, an event ID) based on the applicant's citizenship. For example, you could have the career *UGRD*, country *USA*, and citizenship *Alien Temporary* mapped to an *Undergrad International Office* application center and *GRAD*, *USA*, and *Alien Temporary* mapped to a *Graduate International Office* application center.
Note. If you enter a value in one of the two fields, you cannot leave the other field blank. For example, if you enter a country, you must specify the citizenship.

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Note. When determining the application center assignment, the system uses the following order: citizenship status, academic plan, academic program, and academic career.

Assigned Values

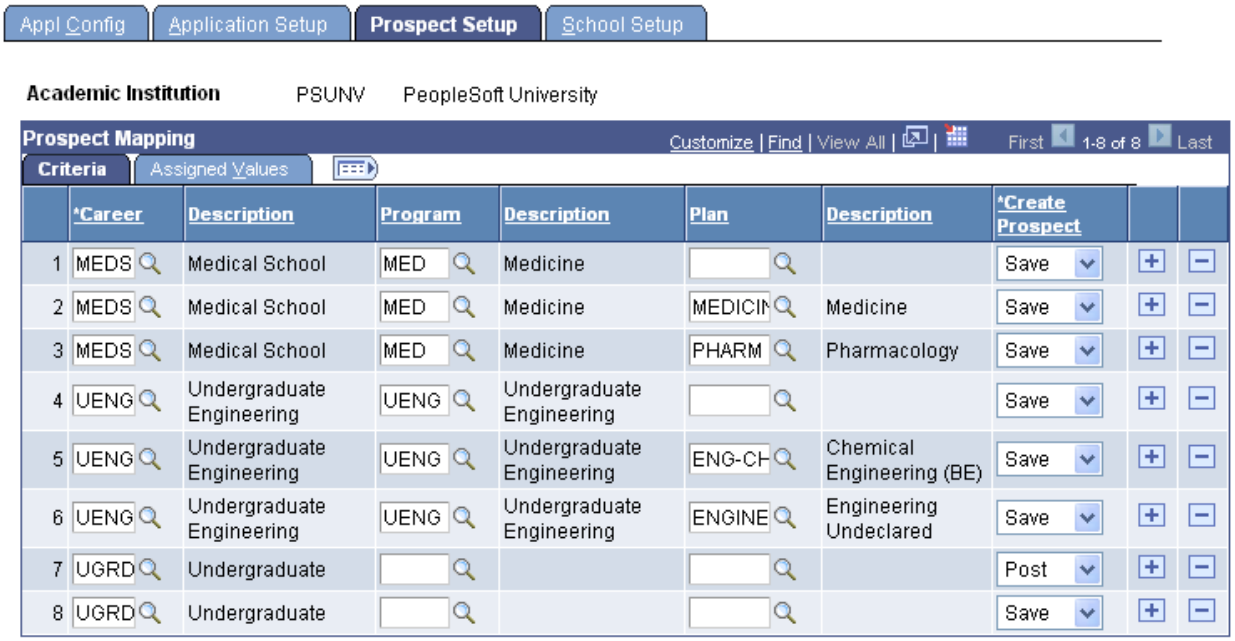
Enter the application center, and optionally the event ID, for the row entered on the Criteria tab.

Only the event IDs that have the administrative functions ADMA (admissions application) and ADMP (admissions program) are available. ADMP is available only if you select an academic program on the Criteria tab. Define event IDs on the Event Definition page.

See *PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine," Defining 3C Engine Events.

Setting Up Prospect Creation Rules and Defaults for Offline and Online Application Transactions

Access the Prospect Setup page (Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, Prospect Setup).



	*Career	Description	Program	Description	Plan	Description	*Create Prospect
1	MEDS	Medical School	MED	Medicine			Save
2	MEDS	Medical School	MED	Medicine	MEDICIN	Medicine	Save
3	MEDS	Medical School	MED	Medicine	PHARM	Pharmacology	Save
4	UENG	Undergraduate Engineering	UENG	Undergraduate Engineering			Save
5	UENG	Undergraduate Engineering	UENG	Undergraduate Engineering	ENG-CH	Chemical Engineering (BE)	Save
6	UENG	Undergraduate Engineering	UENG	Undergraduate Engineering	ENGINE	Engineering Undeclared	Save
7	UGRD	Undergraduate					Post
8	UGRD	Undergraduate					Save

Prospect Setup page: Criteria tab

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Appl Config | Application Setup | **Prospect Setup** | School Setup

Academic Institution PSUNV PeopleSoft University

Prospect Mapping Customize | Find | View All | First 1-8 of 8 Last

Criteria | **Assigned Values**

	Recruiting Center	Description	Recruiting Status	Referral Source	Description	Event ID	Description
1	MEDS	Medical School	Applicat	GFRM	Graduate Forum	AD_PR	Admissions PROP
2	MMED	Medical School - Medicine Prog	Pre-App	INQ	Student Inquiry		
3	MPHA	Medical School - Pharmacy Prog	Prospec	WWW	World Wide Web	NEWPF	New Prospect - PROS
4	UENG	Undergraduate Engineering	Applicat	APPL	Application	AD_PR	Admissions PROS
5	UENG	Undergraduate Engineering	Applicat	APPL	Application	NEWPF	New Prospect - PROS
6	UENG	Undergraduate Engineering	Applicat	APPL	Application	NEWPF	New Prospect - PROP
7	UGRD	Undergraduate	Applicat	APPL	Application		
8	UGRD	Undergraduate	Pre-App	APPL	Application		

Prospect Setup page: Assigned Values tab

Use the Criteria tab to specify whether you want the system to create a prospect when the user saves an application through AAWS or when you post an application to the Campus Solutions database. Also, on this tab define the criteria for creating the prospect. Use the Assigned Values tab to specify the default values that the system assigns to the prospect. You must specify the recruiting center, recruiting status, and referral source values.

In the exhibit example — *Prospect Setup page: Criteria tab* — you can see that for row 3, career is *MEDS*, program is *MED*, plan is *Pharmacology* and Create Prospect value is *SAVE*. For the same row, in the exhibit example — *Prospect Setup page: Assigned Values tab* — values such as the recruiting center *MPHA* is assigned. Assume that a user saves a pharmacology application through AAWS. In such a case, the system creates a prospect record for the applicant and also assigns the default values such as the recruiting center *MPHA* to this newly created prospect record.

This is an optional setup. If you do not want to create a prospect record, when the application is saved or posted, leave the Prospect Setup page blank.

Note. To create prospect on save, the online application must ensure that the required constituent data is collected before the user saves the application.
Also, ensure that the related transaction is set to run real time on save. If the related transaction is set to run on submit, then the Prospect Setup page displays a warning message if you choose the *Save* option for Create Prospect. For example, suppose you have a transaction *UGRD_online_app* and you have mapped this transaction to the UGRD career and GLAKE institution on Appl Config page. You have not selected the Run on Save check box on the Transaction Setup page for this transaction. In such a case, the Prospect Setup page displays a warning message if you select the Save option for the UGRD and GLAKE criteria. If the prospect setup is set to create a prospect on Save, but the transaction is not set to

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run real time on Save, you can still create the prospect record by running the Transaction Management process for Saved transactions.

Criteria

Career	Enter the career for which you want to create prospect records and assign default values.
Program	Optionally, if you have entered a program, enter the plan for which you want to create prospect records and assign default values. If you leave this field blank, the prospect records are created for all the plans within the program or career.
Create Prospect	Identify how you want to create prospect records for the career (and program and/or plan, if applicable): *Save*: Select if you want the system to create a prospect record when it receives a Save Application service operation request or when the applications are loaded into the staging tables using File Parser and have a transaction status of Saved. *Post*: Select if you want the system to create a prospect record when the online or offline transactions are posted to the Campus Solutions database.

If the prospect record already exists for the institution and career of the transaction, the system updates the prospect record to insert program and plan data that does not exist, and also inserts Housing Interest, Financial Aid Interest, Last School Attended and Graduation Date if not previously populated.

Note. If you want to create prospects for all applications received for the criteria entered, enter a row for *Save* and a row for *Post*. This will ensure that the system will create a prospect record when an application is not saved prior to submission.

Assigned Values

Enter the recruiting center, recruiting status, referral source and optionally the event ID, for the row entered on the Criteria tab.

Only the event IDs that have the administrative functions PROS (prospect) and PROP (prospect program) are available. PROP is available only if you select an academic program on the Criteria tab. Define event IDs on the Event Definition page.

Setting Up Home or Unlisted Schools for Online Application Transactions

Access the School Setup page (Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration, School Setup).

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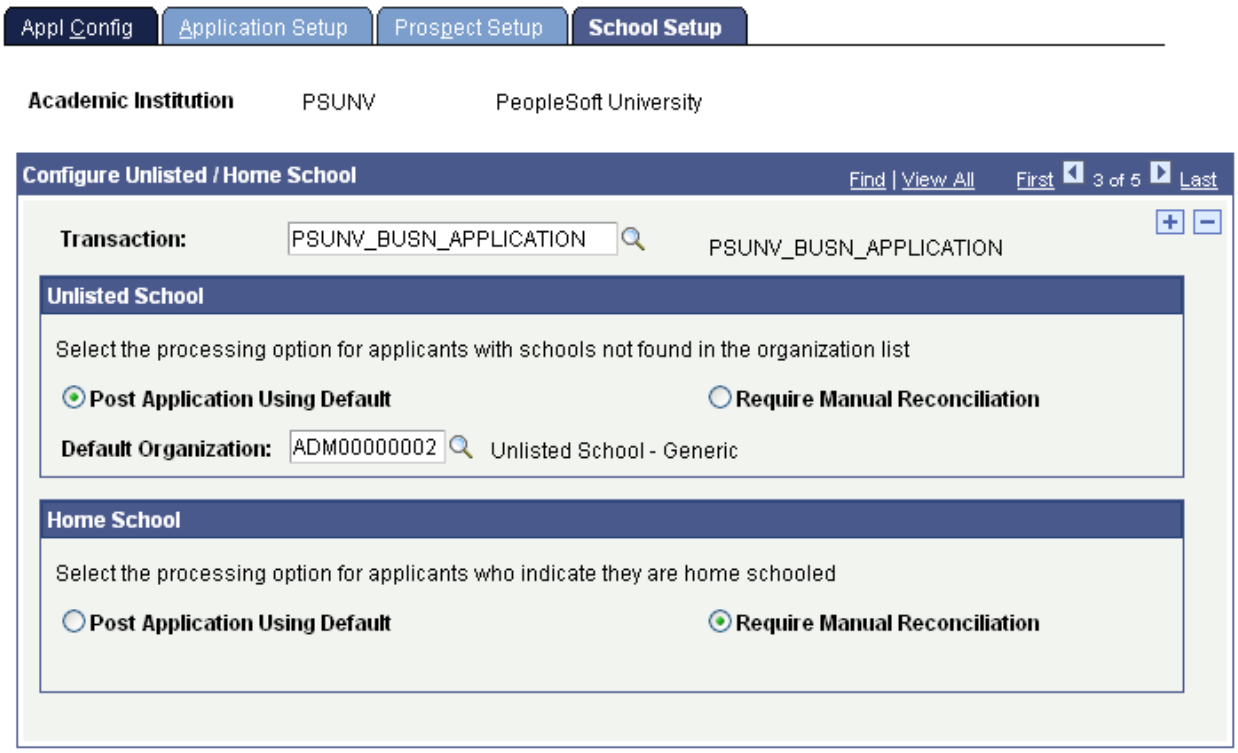

School Setup page

An online application may need to capture the applicant's academic history. The online application may present a field with a list of schools, colleges, and universities that exist in the system's External Organization table and the user may select a value from this list. However, two applicant categories exist, those who have attended an academic institution that is not listed in the list of values (unlisted schools) and those who are home schooled. The online application may present a text field or some other method to capture the home or unlisted school details. Use the School Setup page if you want to define how the system should process these unlisted or home schools.

Unlisted Schools

Post Application Using Default — Select if you want to specify a default organization ID for unlisted schools or if the applicant has not provided the school name.

Default Organization — This field appears if you select the Post Application Using Default option. Specify the default organization ID to post with the application record.

Note. If the application contains multiple rows of Unlisted School data, the default will apply to the first processed row. Because External Organization ID is a key field, it is not possible to use the default more than once. In the event of multiple Unlisted Schools, the web service will create a reconciliation error in the staging component and will require manual reconciliation of the additional Unlisted School rows.

Require Manual Reconciliation — Select if you want to manually correct an application that has an unlisted school or no school.

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If you select this option and if the application transaction has an unlisted school or no school, the system retains the transaction in the staging table with a constituent status of *Error*. You will have to resolve the error message and then post the application. You can use the Application Transactions component to select an appropriate External Org ID and run the post process. Refer to the "Reviewing and Processing Staged Admission Transactions" section of this chapter for more information about this component.

Home School

Post Application Using Default

Select if you want to specify a default organization ID for home schools.

Default Organization

This field appears if you select the Post Application Using Default option. Specify the default organization ID to post with the application record.

Note. If the application contains multiple rows of Home School data, the default will apply to the first processed row. Because External Organization ID is a key field, it is not possible to use the default more than once. In the event of multiple Home Schools, the web service will create a reconciliation error in the staging component and will require manual reconciliation of the additional Home School rows.

Require Manual Reconciliation

Select if you want to manually correct an application that has a home school.

If you select this option and if the applicant has mentioned home school, the system retains the transaction in the staging table with a constituent status of *Error*. You will have to resolve the error message and then post the application. You can use the Application Transactions component to select an appropriate External Org ID and run the post process. Refer to the "Reviewing and Processing Staged Admission Transactions" section of this chapter for more information on about component.

Reviewing and Editing Staged Admission Application Transactions

To review and edit the admission application transactions, use the Application Transactions component (SAD_APPL_STG).

This section discusses:

- Impact of application center security on navigation.
- Header on the Application Transactions pages.
- Reviewing application data and error messages.
- Reviewing applicant's education history.
- Reviewing additional academic information.

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- Reviewing general materials and attachments.
- Reviewing application regional information.

Pages Used to Review and Edit Staged Admission Application Transactions

Page Name	Definition Name	Navigation	Usage
Application Data	SAD_APPL_STG	• Student Admissions, Application Transaction Mgmt, Application Transactions, Application Data • Click the<Transaction Name> link on the Summary Information page of the Constituent Staging component.	Review the error messages pertaining to the application in the staging record. In addition, review and edit the application program data and academic plan data. You can also review and edit the additional information regarding the application, such as application center, application fees, source of interest, other institutions, and recruiter assigned to the application.
Education History	SCC_EXT_ACAD _DATA	• Student Admissions, Application Transaction Mgmt, Application Transactions, Education History • Click the <Transaction Name> link on the Summary Information page and then click the Education History tab.	Review and edit the education history pertaining to the application in the staging record. Education history includes information such as schools attended and degrees that are in progress or completed.

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Additional Academic Info	SAD_STG_TEST	• Student Admissions, Application Transaction Mgmt, Application Transactions, Additional Academic Info • Click the <Transaction Name> link on the Summary Information page and then click the Additional Academic Info tab.	Review and edit the additional academic information pertaining to the application in the staging record. Additional academic information includes test results and academic interests.
Supplemental Information	SAD_GENM_ATTACH	• Student Admissions, Application Transaction Mgmt, Application Transactions, Supplemental Information • Click the <Transaction Name> link on the Summary Information page and then click the Supplemental Information tab.	Review and edit the supplemental information pertaining to the application in the staging record. Supplemental information includes general materials, general material attachments, and application file attachments.
Candidature Details	SSR_RS_CNDDTRE_STG	• Student Admissions, Application Transaction Mgmt, Application Transactions, Candidature Details • Click the <Transaction Name> link on the Summary Information page and then click the Candidature Details tab.	Review and edit the Candidate Management data pertaining to the application in the staging record.

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Application Regional	SAD_APL_REG_ STG	• Student Admissions, Application Transaction Mgmt, Application Transactions, Application Regional • Click the<Transaction Name> link on the Summary Information page and then click the Application Regional tab.	Review and edit the country-specific data pertaining to the application in the staging record.

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Impact of Application Center Security on Navigation

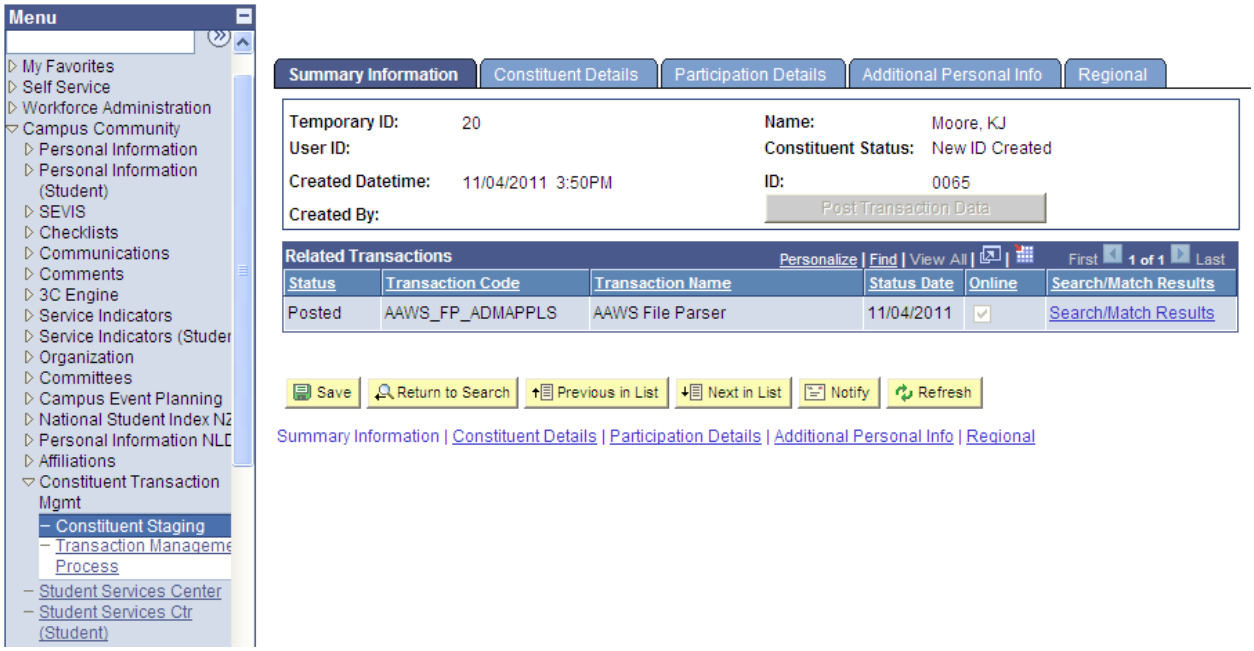
One of the methods to navigate to the Application Transactions component is by clicking the <transaction name> link on the Constituent Staging component. There are two ways to access the Constituent Staging component:

• Campus Community menu path navigation (Campus Community, Constituent Transaction Mgmt, Constituent Staging)

• Student Admissions menu path navigation (Student Admissions, Application Transaction Mgmt, Constituent Staging)

If you use the Campus Community menu path navigation and if your user ID is not associated with a particular application center, you cannot access the application data associated with that application center.

However, you can see how many applications exist for an applicant. In the following example, a user can see there is one application for the constituent. However, the user cannot view the application data because the <Transaction Name> link is disabled. The system has disabled the link because the user does not have access to the application center.



Application Data link disabled for a user who does not have application center access

If you use the Student Admissions menu path navigation and if your user ID is not associated with a particular application center, you cannot see how many applications associated with the application center exist. Also, you cannot view the application data associated with the application center. Therefore, the system strictly enforces the application center security for Student Admissions menu as compared to Campus Community menu where the security is not enforced. In the following example, a user cannot see whether there is an application transaction for the constituent because the user does not have access to the application center.

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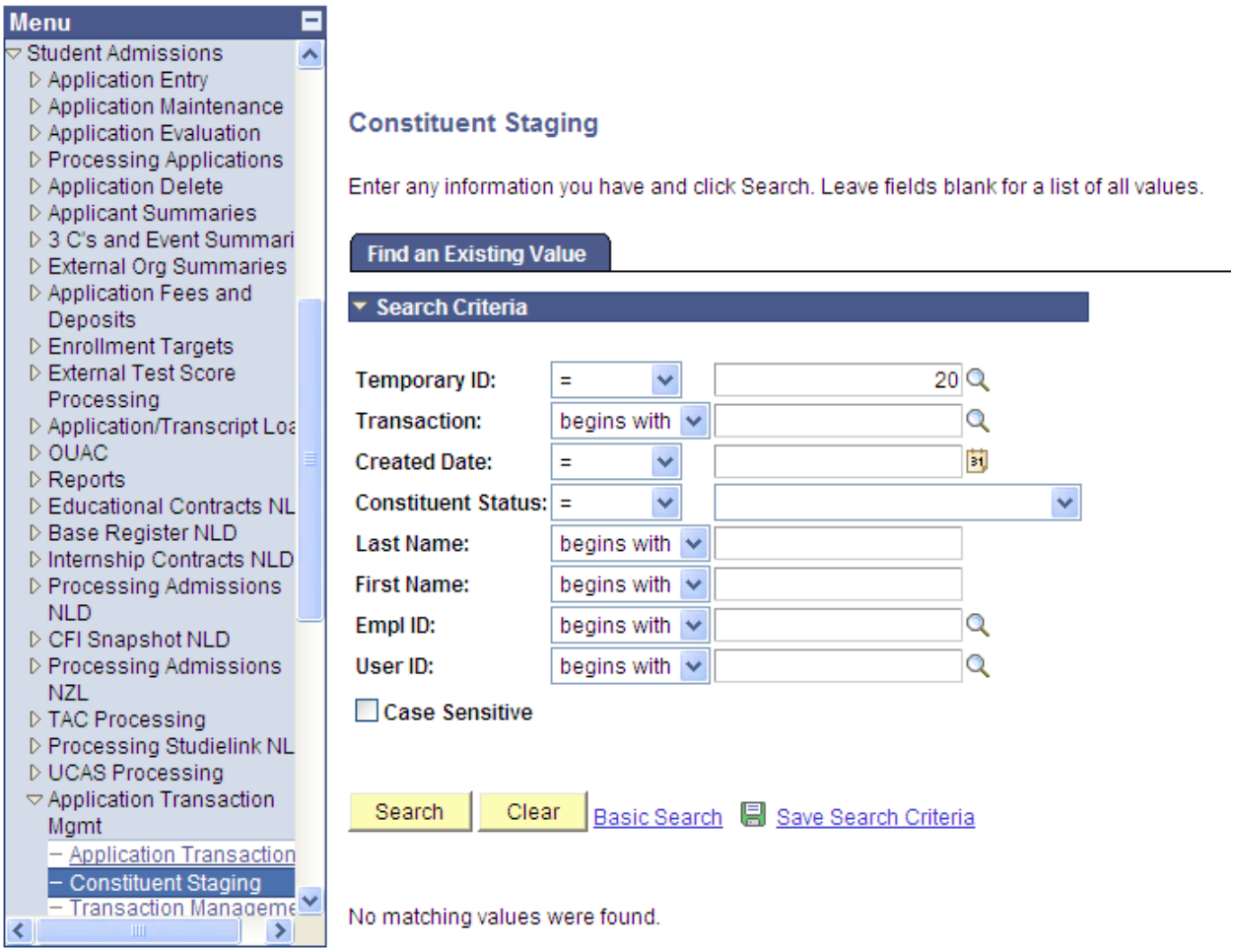

Hidden search results for a user who does not have the application center access

See *PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Securing Recruiting and Admissions", Setting Security for Application Centers

Header on the Application Transactions Pages

The header region on all the pages of the Application Transactions component is similar to the header region on the Constituent Staging component pages. This region includes options to modify the constituent status, run Search/Match/Post process or post a transaction.

Here is an example of the header region on an Application Transactions component page:

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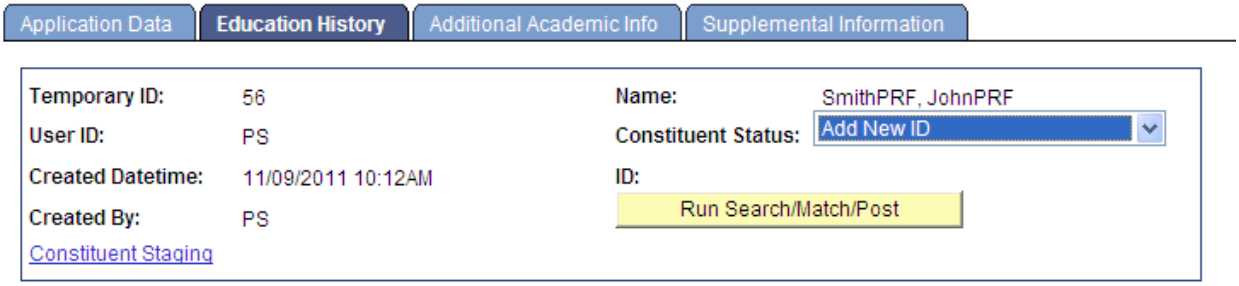
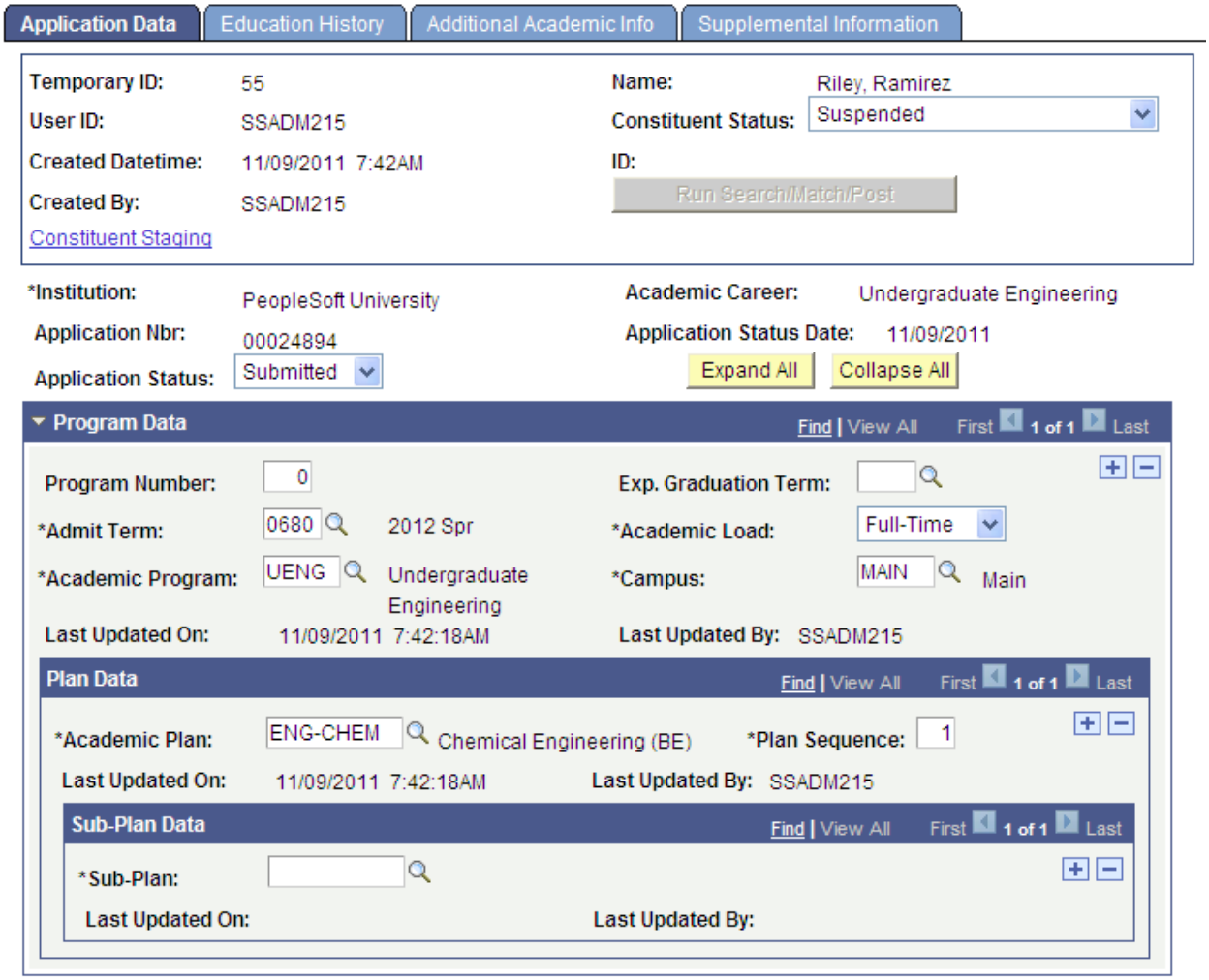


Example of a header region on the Application Transactions component pages

Constituent Staging Click this link to access the Constituent Staging component that contains all the pertinent person information.

Reviewing Application Data and Error Messages

Access the Application Data page (Student Admissions, Application Transaction Mgmt, Application Transactions, Application Data).



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Application Data page (1 of 3)

Application Data

Application Center: UCHE Chem Engin
*Admit Type: FYR First-Year
Academic Level: Freshman
Housing Interest:
☐ Prior Application
☐ Financial Aid Interest
Waiver Basis Code:
Last School Attended:
Graduation Date:
☐ Previous Attendance From Date: To Date:
☐ Graduated early?
☑ Electronic Signature
Last Updated On: 03/05/2012 9:55:09AM

*Notification Plan: Regular
Application Method: Web Appl
*Application Fee Status: Received
Application Fee Date: 03/05/2012
Application Fee Type: Standard
Application Fee Amount:
Application Fee Paid:
Waive Amount:
☑ Not Currently Attending School
☐ Criminal Conviction
Last Updated By: SSADM215

Application Fees Find | View All First 1 of 1 Last

*Tender Category:
Last Updated On:
Tender Amount:
Last Updated By:

Application Data page (2 of 3)

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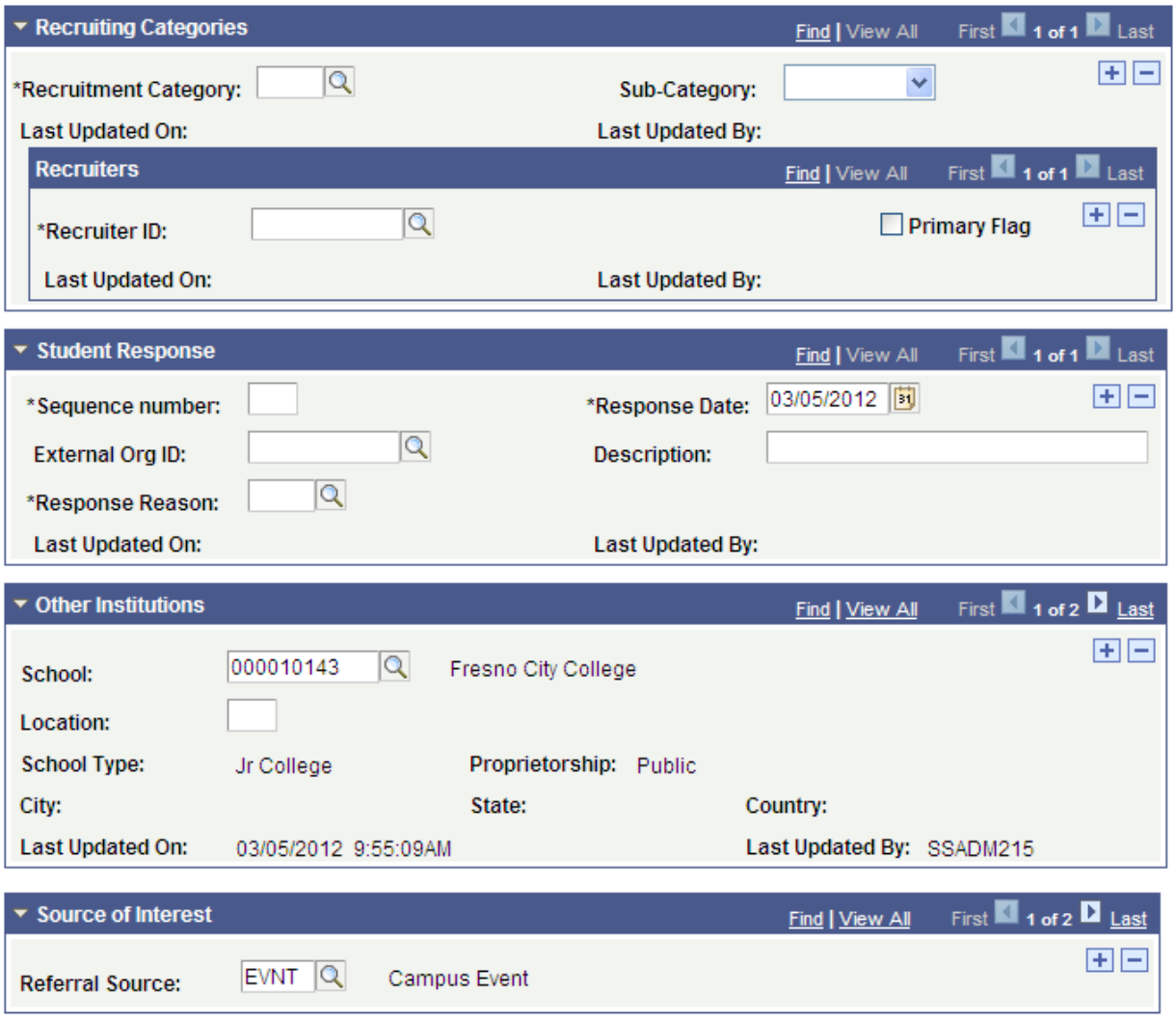

Application Data page (3 of 3)

Set Status to Submitted

This button only appears if the application status is *Posted*.

If you have inadvertently posted the transaction data to a wrong ID, click the Set Status to Submitted button. On clicking the button, the system sets the application status back to *Submitted*. For example, you may notice that an application was posted to a new ID but you should have created the application for an existing ID. To repost the application to the existing ID, perform the following steps:

1. Run the Application Delete process to delete the application that you have posted to the wrong ID so that you do not maintain duplicate applications in the system.

2. Click the Set Status to Submitted button and save the record.

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3. Click the Set to Update ID button and select the existing ID.

4. Click the Run Search/Match/Post button to post the application.

Application Status Indicates the status of the application transaction.

Note: The Transaction Setup component refers to this as Transaction Status. Transaction Status is the same as the Status field shown in the Related Transactions grid displayed on the Summary Information page of the Constituent Staging component. We have modified only the label as Application Status to show the relationship with the application transactions. For a list of Application Status values, refer to following table.

The following table describes the application statuses:

Application Status	Description
Saved	This status indicates that system has saved the admission application to the staging records and the application is not ready to be processed. The system automatically assigns this status when the online application calls the Save Application service operation. You can also manually set this status if you want to indicate that the application is not ready for processing. When setting up the FileMapping Definition, you can define the default value that File Parser should assign as the Application Status.
Submitted	This status indicates that system has submitted the admission application to the staging records and the application is ready to be processed. The system automatically assigns this status to an application when the online application calls the Submit Application service operation. You can manually set this status if you want to indicate that the application is ready for processing. You cannot post *Saved* transactions; only transactions with *Submitted* status can be posted. When setting up the File Mapping Definition, you can define the default value that File Parser should assign as the Application Status.

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Saved Error	This status indicates that the system encountered problems when saving an admission application. You must resolve these errors before the admission application can be posted. You cannot manually change this status. When you resolve the error and save the staging record, the system automatically sets the status back to *Saved*.
Submit Error	This status indicates that the system encountered problems when submitting an admission application. You must resolve these errors before the admission application can be posted. You cannot manually change this status. When you resolve the error and save the staging record, the system automatically sets the status back to *Submitted*.
Pending	This status indicates that manual reconciliation is required for some data element which is not necessarily an error. For example, when manual reconciliation is required for application fee waiver requests, the status is set to *Pending* and the application fee status is set to*Waiver.* You can manually change this status.
Posted	This status indicates that the system has posted the data. The system runs the posting process when you click the Post Transaction Data button or the Run Search/Match/Post button, or when you run the Transaction Management process.

Application Fees

Use the Application Data and Application Fees regions of the page to view or update application fee details. AAWS uses the payment integration services to enable application fees calculation and payment.

The setup of the AAWS Application Fee and Waiver Processing group box on the Application Center Table page controls how an online application fee payment or waiver is processed.

See *PeopleSoft Enterprise Recruiting and Admissions 9.0 PeopleBook*, Building Your Recruiting Structure, Setting Up Your Recruiting Structure, Setting Up Application Processing Centers

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, Using Student Financials Web Services for Hosted ePayment Transactions

When payment is authorized, the Amount Sent to GL field is updated in the Application Transactions staging component (the field is not visible on the page) and is carried through to the core production Application Maintenance component (Application Items page). The Generate Direct to GL process uses the Amount Sent to GL value.

See *PeopleSoft Enterprise Student Financials 9.0 PeopleBook*, Using GL Interface Processing, Generating Direct to GL Entries

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The following scenarios discuss how the system updates the Application Data staging page fields when an online application fee or waiver is processed in Self-Service mode — based on the setup of the AAWS Application Fee and Waiver Processing group box on the Application Center Table page.

The staging field SAD_APL_DAT_STG.APP_FEE_STATUS is not visible on the Application Data staging page.

Processing Application Fees When Waiver Request is Not Allowed

SCENARIO 1

The Application Center Table setup is:

• An application fee is required.

• Payment is required when the application is submitted.

• Waiver request is *not* allowed.

When an applicant has completed all the required data for the online application and is ready to submit the application, the applicant clicks a payment button which triggers the AAWS Submit web service operation (SAD_SUBMITAPPL). The web service operation calls the Application Fee Calculation API which calculates the fee and returns the amount and currency to the external user interface which displays the fee to the applicant.

The staging field SAD_APL_DAT_STG.APP_FEE_STATUS is set to *Calculated.*

When the applicant successfully makes a payment, the application is submitted. The SAD_APL_DAT_STG.APPL_FEE_STATUS field is set to *Received.*

The field values are carried through to the core production Application Maintenance component: ADM_APPL_DATA.APP_FEE_STATUS is set to *Calculated* and ADM_APPL_DATA.APPL_FEE_STATUS is set to *Received.*

If the applicant does not successfully complete the payment process, the application remains in a saved status.

SCENARIO 2

The Application Center Table setup is:

• An application fee is required.

• Pay later *is* allowed.

• Waiver request is *not* allowed.

If the applicant selects to pay now, the process is the same as scenario 1.

If the applicant selects to pay later, SAD_APL_DAT_STG.APP_FEE_STATUS is set to *Calculated* and SAD_APL_DAT_STG.APPL_FEE_STATUS is set to *Defer.*

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These values are carried through to core production: ADM_APPL_DATA.APP_FEE_STATUS is set to *Calculated* and ADM_APPL_DATA.APPL_FEE_STATUS is set to *Deferred.* The Admissions office must follow up on fee payment. No other processing occurs in AAWS.

Processing Application Fee Waivers in Staging

SCENARIO 3

The Application Center Table setup is:

• An application fee is required.

• Payment is required when the application is submitted OR pay later is allowed.

• Waiver request is allowed.

• Manual reconciliation is required.

If the applicant completes the payment, the process is the same as scenario 1.

If the applicant requests a waiver, the applicant indicates the waiver basis (if required based on setup on Application Center Table page) and provides supporting documentation (optional - may be submitted by uploading an attachment or at a later time) and submits the application.

Because Require Manual Reconciliation is selected as the Application Fee Waiver Process option on the Application Center Table page, then when the applicant submits the application, the staging fields are set as follows:

• SAD_APL_DAT_STG. SAD_APPL_STS is set to *Pending.*

• SAD_APL_DAT_STG.APPL_FEE_STATUS is set to *Waiver.*

• SAD_APL_DAT_STG.WAIVED_AMT is set to blank.

• SAD_APL_DAT_STG.APP_FEE_STATUS is set to *Pending.*

The administrator reviews supporting documentation (Supplemental Information page) and grants or denies the waiver.

If the waiver is granted, the staging fields are updated as follows:

• The administrator changes the staging Application Fee Status value to *Waived.*

• Programmatically, SAD_APL_DAT_STG.SAD_APPL_STS is set to *Submitted.*

• SAD_APL_DAT_STG.WAIVED_AMT shows the waiver amount.

• SAD_APL_DAT_STG.APP_FEE_STATUS is set to *Calculated.*

These values are carried through to core production Admissions tables:

• On the Application Data - Application Fees page, the Fee Status value is *Waived,* the Waive Amount value appears, and the Waiver Basis Code value appears based on the value in the related staging field.

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• On the Application Data page, the value in the Status field in the Application Fee Information group box is *Calculated.*

If the waiver is denied, the administrator sets the Application Fee Status to *Pending* and the Application Status is automatically set to *Saved.* The administrator must notify the applicant that the waiver request is denied.

Processing Application Fee Waivers in Core Admissions

SCENARIO 4

The Application Center Table setup is:

• An application fee is required.

• Payment is required when the application is submitted OR pay later *is* allowed.

• Waiver request is allowed.

• Application can be posted to core production before waiver request is determined.

If the applicant completes the payment, the process is the same as scenario 1.

If the applicant selects to pay later, the process is the same as scenario 2. The Admissions office must follow up on fee payment or waiver. No other processing occurs in AAWS.

If the applicant requests a waiver, the applicant indicates the waiver basis (if required based on setup on Application Center Table page) and provides supporting documentation (optional - may be submitted by uploading an attachment or at a later time) and submits the application.

If Allow to Post is selected as the Application Fee Waiver Process option and the App Fee Status Waived option is selected on the Application Center Table page, then when the applicant submits the application, the staging fields are set as follows:

• SAD_APL_DAT_STG.APPL_FEE_STATUS is set to *Waived.*

• SAD_APL_DAT_STG.WAIVED_AMT is set to blank.

• SAD_APL_DAT_STG.APP_FEE_STATUS is set to *Calculated.*

These values are carried through to core production Admissions tables:

• On the Application Data - Application Fees page, the Fee Status value is *Waived,* the Waive Amount value is blank and the Waiver Basis Code value appears based on the value in the related staging field.

• On the Application Data page, the value in the Status field in the Application Fee Information group box is *Calculated.*

The App Fee Status Waived option could be used by schools who allow waivers but automatically grant the waiver without review or assessment.

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If Allow to Post is selected as the Application Fee Waiver Process option and the App Fee Status Waiver Request option is selected on the Application Center Table page, then when the applicant submits the application, the staging fields are set as follows:

• SAD_APL_DAT_STG.APPL_FEE_STATUS is set to *Waiver.*

• SAD_APL_DAT_STG.WAIVED_AMT is set to blank.

• SAD_APL_DAT_STG.APP_FEE_STATUS is set to *Pending.*

These values are carried through to core production Admissions tables:

• On the Application Data - Application Fees page, the Fee Status value is Waiver, the Waive Amount value is blank and the Waiver Basis Code value appears based on the value in the related staging field.

• On the Application Data page, the value in the Status field in the Application Fee Information group box is *Pending*.

Waiver requests must be assessed using the core production Application Maintenance component.

Query the record ADM_APPL_DATA and the field APPL_FEE_STATUS to find the applicants with waiver requests.

[[**Bundle 26**: Code changes are introduced to support the Administrator mode processing for application fees and waivers]]

The following scenarios discuss how the system updates the Application Data staging page fields when an online application fee or waiver is processed in Administrator mode — based on the setup of the AAWS Application Fee and Waiver Processing group box on the Application Center Table page.

Because in Administrator mode, an administrative user is entering application data on behalf of the applicant, an institution may design the user interface for Administrator mode differently than the user interface for Self-Service mode. In the user interface for Self-Service mode, the institution may implement greater control to dictate what options are presented to an applicant based upon the application center parameters for application fees and waiver processing for AAWS. For Administrator mode, although there may be less control in dictating these options, the application center parameters must still be enforced. Therefore, while the following scenarios are similar to the scenarios listed above for Self-Service mode, some of the logic and behavior for Administrator mode may vary.

Scenario 1

The Application Center Table setup is:

An application fee is *not* required.

User completes all the required sections of the application form and submits the application. Fields are set as follows:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = *Pending.*
- APPL_FEE_TYPE = UI determined.

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- APPL_FEE_DT = Submit date.

Scenario 2

The Application Center Table setup is:

- An application fee is required.
- Payment is required when the application is submitted.
- Waiver request is not allowed.

In this scenario, in order to submit the application, the user must populate the APPL_FEE_STATUS = Received (*REC*) and may give the fee amount. If the APPL_FEE_STATUS is not set to Received (*REC*), the application will remain in *Saved* status in the staging component.

- Application fee calculation returns value to the application fee amount field.
- User must indicate APPL_FEE_STATUS = Received (*REC*).
- User *may* indicate the APPL_FEE_PAID value.
- User *may* populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
  - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (*REC*).
  - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank.
  - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
  - SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2)* (returned from the fee calculation API).
  - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
  - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
  - ADM_APPL_DATA.APPL_FEE_STATUS = Received (*REC*).
  - ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.
  - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
  - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
  - ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
  - ADM_APPL_TENDER.TENDER_AMT = User-populated value.

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Because the application center setup dictates that the fee is required and must be paid at application submission, failure to indicate an APPL_FEE_STATUS of Received (*REC*) results in the application remaining in *Saved* status in the staging component, with these fields set as follows:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = *Pending.*
- SAD_APL_DAT_STG.APP_FEE_STATUS = *Pending.*
- SAD_APL_DAT_STG. SCC_TRANS_STS = *SAVED.*

Scenario 3

The Application Center Table setup is:

- An application fee is required.
- Payment is not required at submission (payment can be made later).
- Waiver request is not allowed.

In this scenario, at application submission, the user has the option to either:

- Provide fee payment details or
- Submit an application without payment details.

The APPL_FEE_STATUS values in use for this scenario are *REC* and *DEF*.

If the user provides the fee payment details:

- User must indicate APPL_FEE_STATUS = Received (*REC*).
- User *may* indicate the APPL_FEE_PAID value.
- User *may* populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
  - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (*REC*).
  - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank.
  - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
  - SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2)* (returned from the fee calculation API).
  - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values under application fee setup.
  - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
  - ADM_APPL_DATA.APPL_FEE_STATUS = Received (*REC*).
  - ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.

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- ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
- ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
- ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values under application fee setup.
- ADM_APPL_TENDER.TENDER_AMT = User-populated value.

However, the user may opt to submit without populating the application fee status field. Because the system cannot rely on a user supplying the correct value of *Defer*, the system enforces application fee status to *DEF* if the application fee status value does not = Received (*REC*). If the application is submitted without any payment details:

- Fields are set as follows:
  - SAD_APL_DAT_STG.APPL_FEE_STATUS = Defer (*DEF*).
  - SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2).*
  - SAD_APL_DAT_STG.APPL_FEE_PAID = Blank.
  - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.

- The same values are carried through to production as:
  - ADM_APPL_DATA.APPL_FEE_STATUS = Defer (*DEF*).
  - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
  - ADM_APPL_DATA.APPL_FEE_PAID = Blank.
  - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.

Scenario 4

The Application Center Table setup is:

- An application fee is required.
- Payment is required when the application is submitted.
- Waiver request is allowed.

In this scenario, the user must:

- Provide fee payment details or
- Provide fee waiver details.

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If neither payment nor waiver details are provided at application submission, the application must remain in *Saved* status.

Valid APPL_FEE_STATUS values used in this scenario are: *REC*, *WRQ*, *WVD*, and *PENDING*.

User provides the fee payment details:

- User must indicate APPL_FEE_STATUS = Received (*REC*).
- User *may* indicate the APPL_FEE_PAID value.
- User *may* populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
    - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (*REC*).
    - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank.
    - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
    - SAD_APL_DAT_STG.APP_FEE_STATUS = Calculated (2) (returned from the fee calculation API).
    - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values under application fee setup.
    - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
    - ADM_APPL_DATA.APPL_FEE_STATUS = Received (*REC*).
    - ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.
    - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
    - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
    - ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values under application fee setup.
    - ADM_APPL_TENDER.TENDER_AMT = User-populated value.

User provides waiver details:

If application center setting for waiver processing is *Require Manual Reconciliation* then:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = Waiver request (*WVQ*) (the system enforces *WVQ* even if user provides *WVD*).
- SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2).*
- SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
- SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.

With this setting in place, in staging SAD_APL_DAT_STG. SCC_TRANS_STS is set to *Pending.*

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- The same values are carried through to production as (these values may change as the user will do manual reconciliation and update some values):
    - ADM_APPL_DATA.APPL_FEE_STATUS = User-provided value that the system stores in the staging table during reconciliation.
    - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
    - ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
    - ADM_APPL_DATA. SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.

Else

If application center setting for waiver processing is *Allow to Post* then:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = Setting specified on the application center parameters for waiver processing is either Waived (*WVD*) or Waiver request (*WVQ*). The system enforces *WVD* or *WVQ* from application center setting regardless of what user indicates.
- SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2).*
- SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
- SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.

The same values are carried through to production as:

- ADM_APPL_DATA.APPL_FEE_STATUS = Determined value of *WVD* or *WVQ* based upon application center setting.
- ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
- ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
- ADM_APPL_DATA. SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.

If the APPL_FEE_STATUS is not *REC*, *WVD*, (or *WRQ*) then:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = Pending (*PEN*).
- SAD_APL_DAT_STG.APP_FEE_STATUS = *Pending (1).*
- SAD_APL_DAT_STG. SCC_TRANS_STS = *SAVED.*

Scenario 5

The Application Center Table setup is:

- An application fee is required.
- Payment is not required at submission (payment can be made later).
- Waiver request is allowed.

In this scenario, the user can:

- Provide fee payment details or

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- Provide fee waiver details or
- Not provide either payment or waiver details.

Valid APPL_FEE_STATUS values used in this scenario are: *REC, DEF, WRQ, WVD, and PENDING.*

If the user provides the fee payment details:

- User must indicate APPL_FEE_STATUS = Received (*REC*).
- User *may* indicate the APPL_FEE_PAID value.
- User *may* populate the tender category and tender amount fields and the system stores these values in staging and production tables.
- Status fields are set as follows:
    - SAD_APL_DAT_STG.APPL_FEE_STATUS = Received (*REC*).
    - SAD_APL_DAT_STG.APPL_FEE_PAID = User-provided value. May be blank.
    - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
    - SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2)* (returned from the fee calculation API).
    - SAD_APL_TND_STG.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
    - SAD_APL_TND_STG.TENDER_AMT = User-populated value.
- The same values are carried through to production as:
    - ADM_APPL_DATA.APPL_FEE_STATUS = Received (*REC*).
    - ADM_APPL_DATA.APPL_FEE_PAID = User-provided value. May be blank.
    - ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
    - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
    - ADM_APPL_TENDER.TENDER_CATEGORY = User-selected value from valid values in application fee setup.
    - ADM_APPL_TENDER.TENDER_AMT = User-populated value.

User provides waiver details:

If application center setting for waiver processing is *Require Manual Reconciliation* then:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = Waiver request (*WVQ*) (the system enforces *WVQ* even if user provides *WVD*).
- SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2).*
- SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
- SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.

With this setting in place, SAD_APL_DAT_STG. SCC_TRANS_STS in staging is set to *Pending.*

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- The same values are carried through to production as (these values may change as the user will do manual reconciliation and update some values):
    - ADM_APPL_DATA.APPL_FEE_STATUS = User-provided value that the system stores in the staging table during reconciliation.
    - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
    - ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
    - ADM_APPL_DATA. SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.

Else

If application center setting for waiver processing is *Allow to Post* then:

- SAD_APL_DAT_STG.APPL_FEE_STATUS = Setting specified on the application center parameters for waiver processing is either Waived (*WVD*) or Waiver request (*WVQ*). The system enforces *WVD* or *WVQ* from application center setting regardless of what user indicates.
- SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2)*
- SAD_APL_DAT_STG.WAIVE_AMT = User-provided value. May be blank.
- SAD_APL_DAT_STG.SAD_WAIVER_BASIS = User-provided value from valid waiver basis values in the application center setup.

The same values are carried through to production as:

- ADM_APPL_DATA.APPL_FEE_STATUS = Determined value of *WVD* or *WVQ* based upon application center setting.
- ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2).*
- ADM_APPL_DATA.WAIVE_AMT = User-provided value. May be blank.
- ADM_APPL_DATA. SAD_WAIVER_BASIS = User-provided value from valid values in the application center setup.

User submits without payment details or waiver details:

Because the system cannot rely on a user supplying the correct value of *Defer* (*DEF*), the system enforces application fee status to *DEF* if the application fee status value does not = *REC, WVD, or WVQ*.

- Fields are set as follows:
    - SAD_APL_DAT_STG.APPL_FEE_STATUS = Defer (*DEF*).
    - SAD_APL_DAT_STG.APP_FEE_STATUS = *Calculated (2).*
    - SAD_APL_DAT_STG.APPL_FEE_PAID = Blank.
    - SAD_APL_DAT_STG.APPL_FEE_AMOUNT = Value returned by the fee calculation API.
- The same values are carried through to production as:
    - ADM_APPL_DATA.APPL_FEE_STATUS= Defer (*DEF*)
    - ADM_APPL_DATA.APP_FEE_STATUS = *Calculated (2)*
    - ADM_APPL_DATA.APPL_FEE_PAID = Blank

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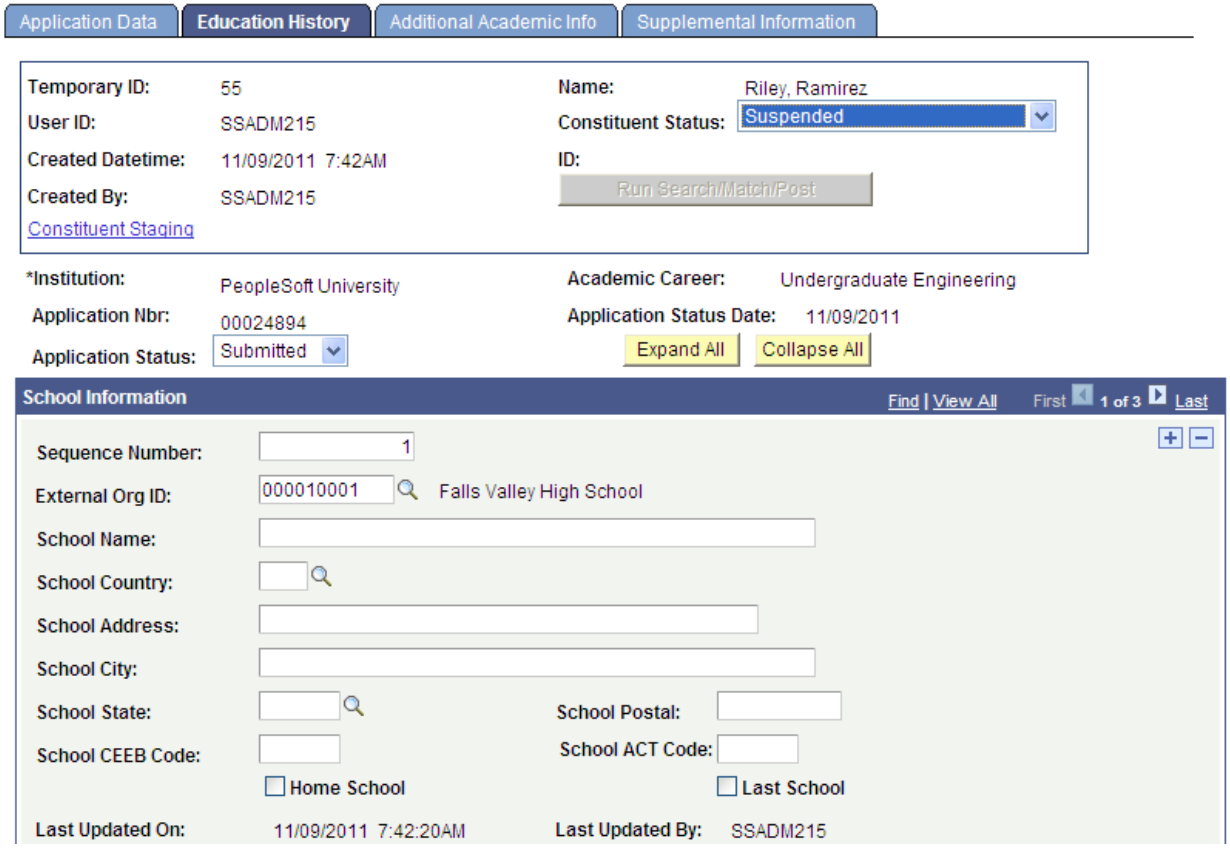
- ADM_APPL_DATA.APPL_FEE_AMOUNT = Value returned by the fee calculation API.

Reviewing Applicant's Education History

Access the Education History page (Student Admissions, Application Transaction Mgmt, Application Transactions, Education History).



Education History page (1 of 3)

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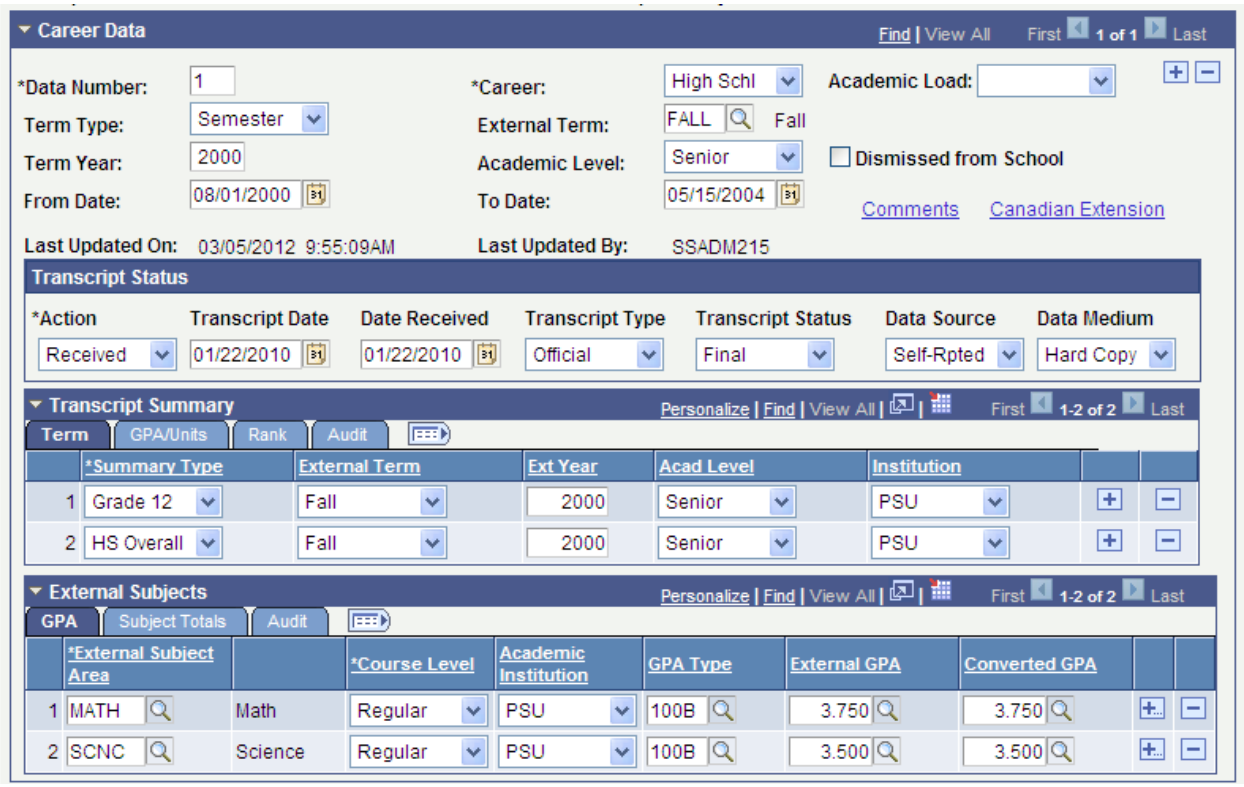
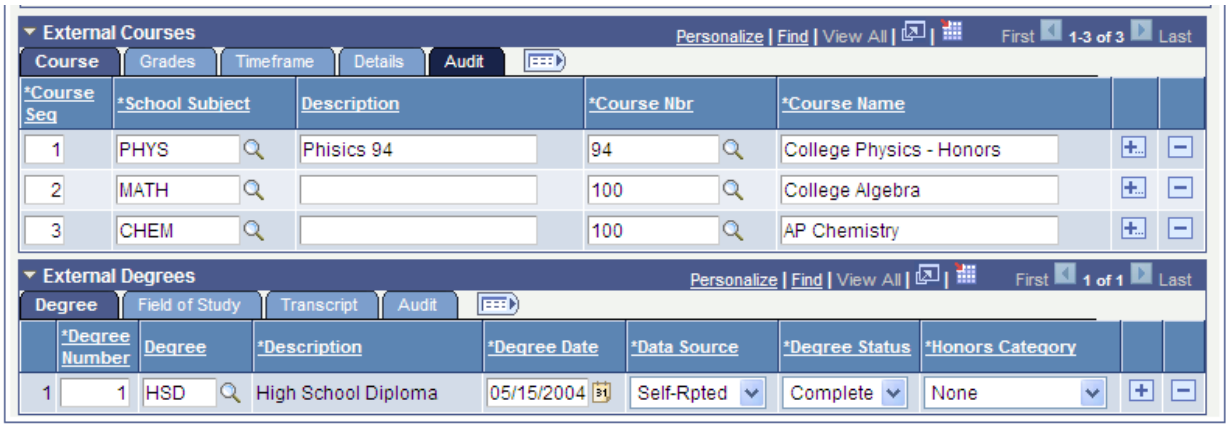


Education History page (2 of 3)



Education History page (3 of 3)

Reviewing Additional Academic Information

Access the Additional Academic Info page (Student Admissions, Application Transaction Mgmt, Application Transactions, Additional Academic Info).

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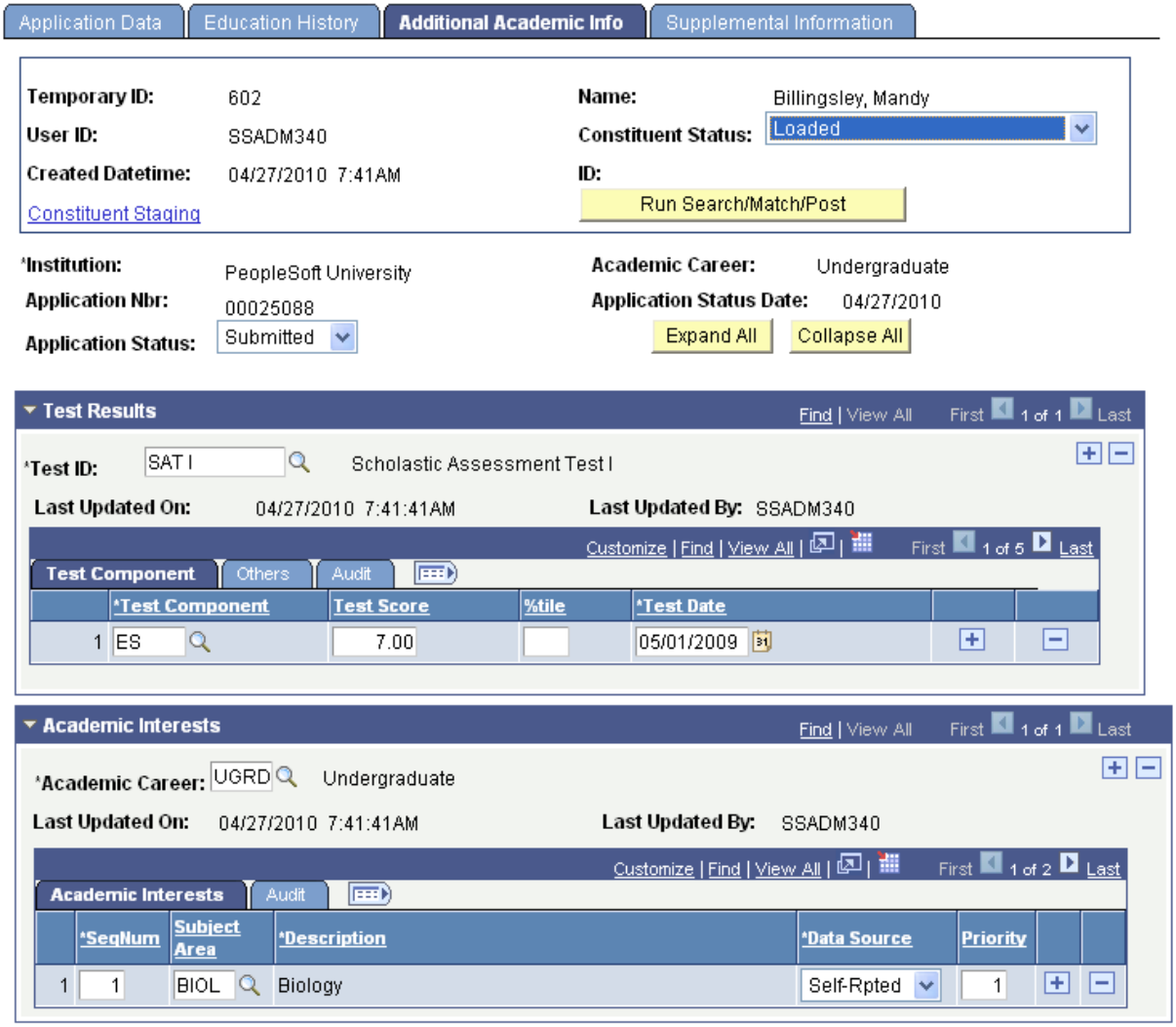

Additional Academic Info page

Reviewing General Materials and Attachments

Access the Supplemental Information page (Student Admissions, Application Transaction Mgmt, Application Transactions, Supplemental Information).

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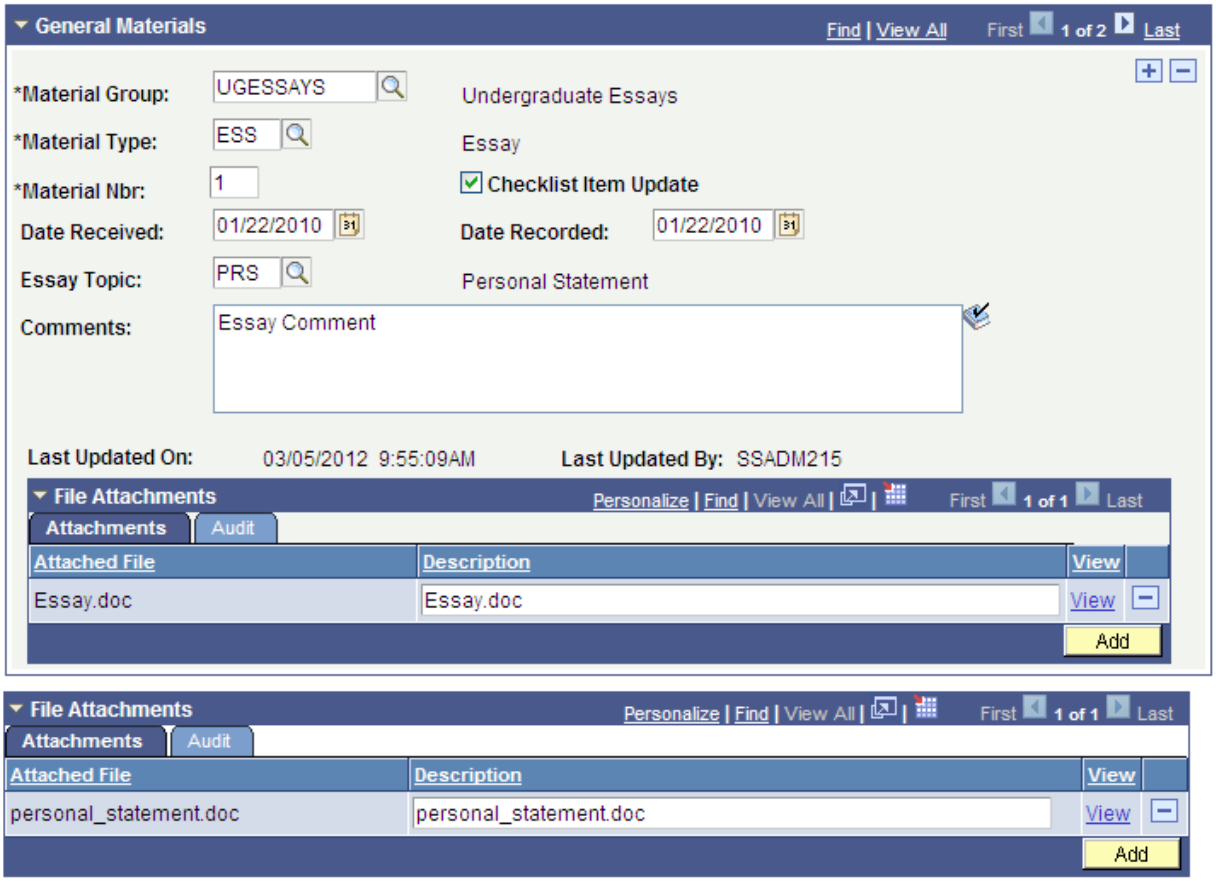
Supplemental Information page (1 of 2)



Supplemental Information page (2 of 2)

Reviewing Candidature Details Information

Access the Candidature Details page (Student Admissions, Application Transaction Mgmt, Application Transactions, Candidature Details).

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Application Data | Education History | Additional Academic Info | Supplemental Information | Candidature Details

Temporary ID: 5
User ID: CJR100
Created Datetime: 02/27/2012 8:11AM
Created By: CJR100
Constituent Staging

Name: Brinton, Lene
Constituent Status: Loaded
ID: 0065
Run Search/Match/Post

*Institution: PeopleSoft University
Application Nbr: 00024847
Application Status: Submitted

Academic Career: Medical School
Application Status Date: 02/27/2012
Expand All | Collapse All

Academic Program: Medicine
Academic Plan: Animal Testing Research 1

Candidate Number: 000000000002

Attachments (0)

Consumption — Find | View All — First 1 of 1 Last

Earliest Submission Date: 11/30/2011
Final Submission Date: 12/30/2011
*Consumption Load: 80
Status: CHANGE — Change Requested
Status Date: 02/08/2012

Candidature Details page (1 of 3)

Research Topic — Find | View All — First 1 of 1 Last

*Topic Sequence: 1 — Topic Search — Create Topic — Attachments (0)

Topic Details — Find | View All — First 1 of 1 Last

Topic Code: RT0002
Research Topic: New Surgical Techniques for Left handers
Topic Description: A review of technical procedures for left handed surgery
Thesis Title: Left Handed Sugery
Status: P — Proposal Submitted
*Status Date: 02/08/2012

Candidature Details page (2 of 3)

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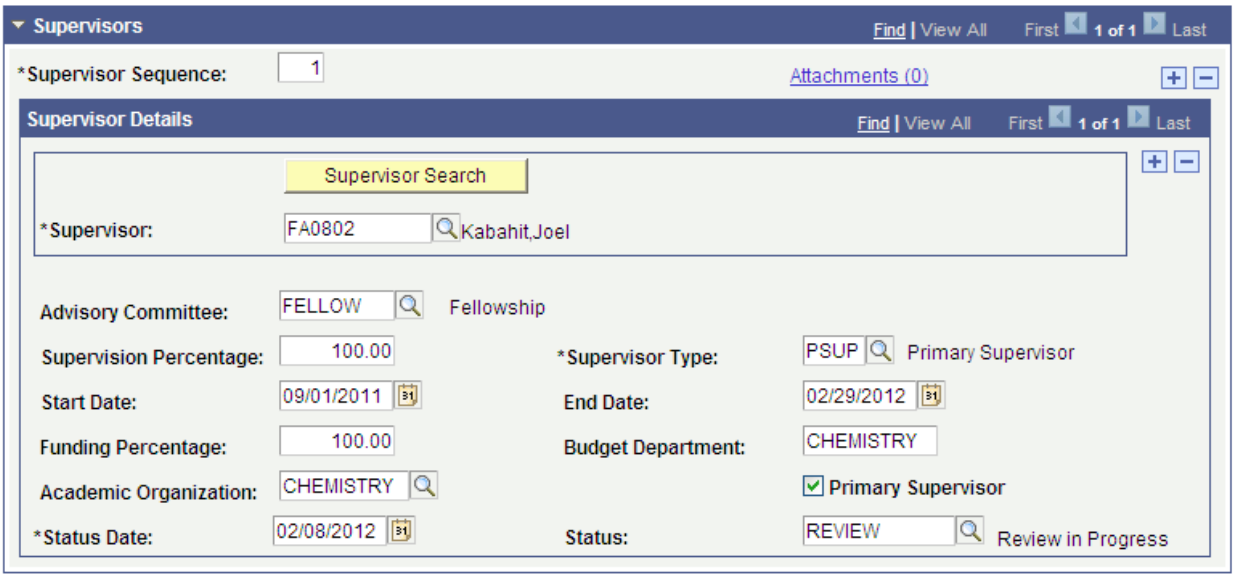

Candidature Details page (3 of 3)

Reviewing Application Regional Information

Access the Application Regional page (Student Admissions, Application Transaction Mgmt, Application Transactions, Application Regional).

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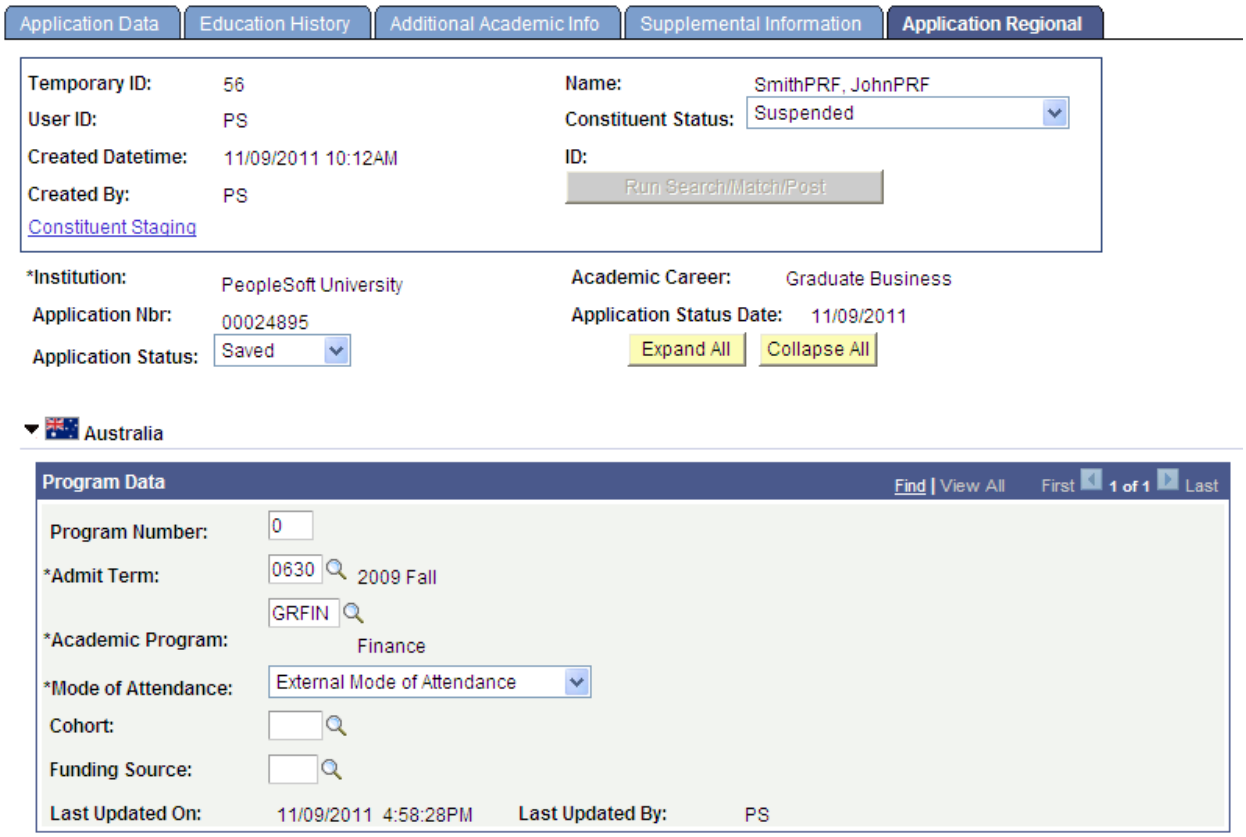

Application Regional page: Australia

The system displays this page only if the country-specific options are selected on the SA Features and Academic Institution 6 pages.

See Also

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook , “Reviewing Installation Setup and System Defaults”, Selecting Student Administration Installation Options

PeopleSoft Enterprise Campus Solutions 9.0 Application Fundamentals PeopleBook , "Designing Your Academic Structure," (AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features

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