CHAPTER 1

Working with Constituent Transaction Management

This chapter provides an overview of the Constituent Transaction Management (CTM) framework and discusses:

- Using staging tables.
- Using self-service and administrator modes for online CTM transactions.
- New user registration and CTM.
- Entity registry and CTM.
- External search match and CTM.
- List of values framework and CTM.
- Setting up CTM.
- Processing staged CTM transactions.
- Developer reference for creating a new CTM consumer.

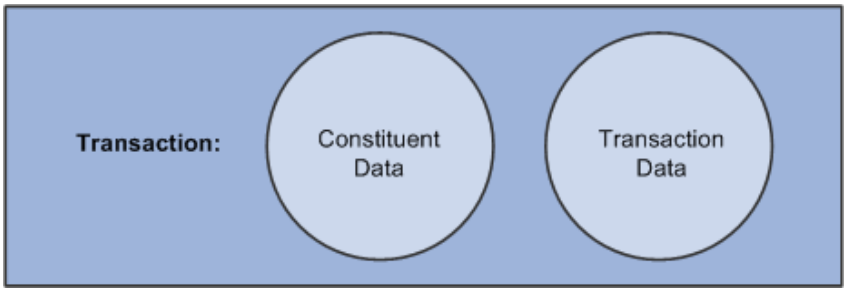
Note. The Campus Solutions PeopleBook chapters listed under the See Also headings or See topics may get updated with future bundle releases.

Understanding CTM

The CTM framework is used for performing Campus Solutions transactions that require staging of the data prior to posting to production tables.

Staging of the data is done with the use of temporary records (staging records) that mimic the production records. Because transactions normally include constituent data, CTM standardizes the handling of that data and offers a framework to process the data that is specific to the transactions. Constituent data includes data related to the person available in the Campus Solutions data models. Examples of constituent data include Name, Gender, Address, Email and Driving Licenses.

The following diagram shows that a CTM transaction contains constituent data and transaction-specific data.



Representation of how CTM separates the data included in a transaction

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By staging data into temporary records prior to saving into the appropriate production records, CTM assures consistency for handling and processing the data and offers configurability to adjust to all transactions specificities.

A transaction defined with CTM can be *online* (web-based transactions performed by a self-service user) or *offline* (through batch loads). In the case of transactions performed online, temporarily saving the data entered by a self-service user allows for data retrieval when the user returns to complete the transaction. Temporarily saving the data also allows for full completion of a transaction even when the system has not assigned an EMPLID to a person. For example, if an online transaction takes too long to complete, the self-service user can save the data and come back later. The data entered is saved into the staging tables and can be retrieved when the user comes back to complete the transaction. When finally submitting the transaction, all data stays saved inside the staging tables until Search/Match is called to identify an EMPLID. CTM keeps the data in temporary tables, thereby allowing full completion of a transaction.

An external user interface can use CTM with the New User Registration functionality to create a user profile for a guest user or to authenticate a returning user. Refer to the Using New User Registration Framework PeopleBook chapter for how this is done.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Using New User Registration Framework”

When a transaction is generated, the system uses Search/Match or External 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 CTM 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. CTM validates the constituent data entered as well as the data entered for the transaction itself. The system stores the constituent and the transaction-specific data in staging tables. If there are validation errors or if Search/Match determines that the incoming constituent record should be suspended or ignored, use the Constituent Staging and the transaction staging components to correct the data. When the staged data passes all validations, CTM posts both the constituent and the transaction-specific staged data to the predefined production tables. The posting is done based on rules that you defined through the Data Update Rule functionality. You can post transactions individually or by batch to the Campus Solutions database. The Constituent Staging and the transaction staging components are discussed in the “Processing Staged CTM Transactions” section of this chapter.

CTM offers three ways for processing the staged data and posting to production records:

- *Realtime:* At the time the self-service user saves or submits an online transaction.
- *Manual:* At the time an administrative user individually reviews the staged data using the Constituent Staging component or using the transaction staging component and manually posts the constituent and/or the transaction-specific data to production table.
- *Batch:* Using the Transaction Management process to post multiple staged rows at the same time. The Transaction Management process can be used for online transactions for which you do not want to process *Realtime* or for data loaded through a batch utility such as File Parser.

CTM uses web services and a number of application classes to facilitate the staging and posting of constituent and related transaction data into appropriate production tables. To do so, CTM takes full advantage of the Entity Registry framework. All constituent and transaction staging records are tied to an Entity Name.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up Entity Registry"

CTM framework can be seen as a provider of processing services and the CTM transactions as consumers. At the time of delivering the CTM framework, three consumers of CTM are delivered with the system:

- Admission Applications Web Service (AAWS) admission transaction.
- New User Registration framework.

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- UCAS batch process transaction used by the United Kingdom customers.

Note. The three delivered consumers of CTM are fully implemented and with some required setup, they are ready for you to use. They are also referred as CTM transactions. The three delivered consumers are documented in their respective PeopleBook chapter. To create new consumers of CTM, follow the steps described in the "Developer Reference for Creating a New CTM Consumer" section of this chapter.

CTM Framework

CTM framework enables you to set up your own transactions or create your own consumers, whether they are to be performed online by a guest, a self-service user or an administrative user, or performed by batch. This chapter explains how to set up CTM, how to create your own transactions by taking full advantage of CTM framework, and how the constituent and the transaction-specific data are processed from staging to production tables.

Examples of transactions that CTM can process:

- Batch transactions (*offline* transactions): Transactions that come from an external file that needs to be staged to first allow data processing specific to Campus Solutions and to trigger Search/Match to avoid entering duplicates into the system. Because you do not necessarily know the quality of the data contained in the file and want to make sure to avoid creating duplicates, keep the file data in the temporary tables, and when ready post to the appropriate production tables.
- Self-service transactions (*online* transactions) that can take too long to complete and therefore should allow the self-service user to *Save* and come back later to continue and *Submit*. The saved data, because incomplete and potentially contains erroneous information should be staged and not be posted until the transaction is submitted and free of validation errors. Saving the data into temporary records allows you to display the previously entered information when the self-service user comes back to complete the transaction.
- Self-service transactions (*online* transactions): You created your own web-based online transaction that can be accessed and performed by anybody in the world. Your institution may or may not know these users and they may never complete their transaction. Using CTM, the system stores the entered information into temporary tables and performs Search/Match or External Search/Match to identify an EMPLID. The data is only posted to the production records when the self-service user is serious and confirms the data entered.

Note. For the online transactions, the biggest advantage to use CTM and therefore save data into staging tables is that it allows a self-service user to fully complete an online transaction even though an EMPLID is not yet assigned. Only once the data is saved or submitted (depending on how you configure your CTM transaction) Search/Match or External Search/Match is used to create or identify an ID. The process behind the scenes to assign an EMPLID is completely transparent to the online user.

Warning! Setting up a CTM transaction requires technical knowledge of the record structure used by the transaction.

Using Staging Tables

There are two types of staging tables:

- Constituent staging records.
- Transaction-specific staging records.

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The constituent staging records are reusable across all transactions and therefore delivered with your system as part of CTM. The transaction-specific staging records must be created based on the transaction you want to perform.

A staging record is modeled after the corresponding production record, but its structure varies slightly:

- It is keyed by Temporary ID (SCC_TEMP_ID) instead of ID (EMPLID).
- It is never effective-dated (even if the matching production record is effective-dated). This is because the data entered in staging records can be updated, modified many times prior to be posted to production. Only at that time, the data is current and therefore the production record gets set with the date the data is posted.

The constituent data is saved in the delivered constituent staging records (see the following list of delivered constituent staging records). The transaction-specific data is stored in the transaction staging records. These staging records are either delivered with your system in the case of fully implemented delivered CTM consumers transactions (such as the AAWS admission transaction) or created by you for the transaction of your choice.

See "Developer Reference for Creating a New CTM Consumer", Step 1: Creating or Extending Staging Tables section of this chapter.

Constituent Staging Records

At the time of delivering this chapter, the following constituent staging records are delivered for the matching production records:

Staging Record Definitions	Staging Record Names	Production Record Names
Academic History *	SCC_STG_ACADHST	ACAD_HISTORY
Academic Interests Header *	SCC_STG_ADMIHD	ADM_INTRST_HDR
Address	SCC_STG_ADDR	HCR_PER_ADDR_I
CHESSN (AUS)	SCC_CHSNAUS_STG	SCC_CHESSN_AUS
CHESSN Prior HEP (AUS)	SCC_PRHEPAU_STG	SCC_PRV_HEP_AUS
CHESSN Year 12 (AUS)	SCC_YR12_AU_STG	SCC_YEAR12_AUS
Citizenship	SCC_STG_CITZN	SCC_CITIZSHIP_I
Citizenship History (AUS)	SCC_CITZHST_STG	SCC_CITIZ_HIST
Disability	SCC_STG_DISBLTY	HCR_DISABL_I
Diversity	SCC_STG_DIVRSTY	SCC_DIVERS_I
Drivers License	SCC_STG_DRV_LIC	SCC_DRVR_LIC_I
Email Address	SCC_STG_EMAIL	HCR_PER_EMAIL_I
Emergency Contact	SCC_STG_EMG_CNT	SCC_EMERG_CNT_2
External System Key	SCC_STG_EXT_SKY	EXTERNAL_SYSKEY
Extracurricular Activity	SCC_STG_EXTRACU	EXTRACUR_ACTVTY
General Materials *	SAD_STG_GEN_MAT	GENL_MATERIALS
HESA Person (UK)	SCC_HE_PERS_STG	SCC_HE_PERSON
Higher Ed Student Data (NLD)	SSR_STD_NLD_STG	SSR_STUDENT_NLD
Honors and Awards	SCC_STG_HON_AWD	HONOR_AWARD_CS
Language	SCC_STG_LANG	SCC_ACCOM_LNG_2
Licenses and Certificates	SCC_STG_LICCERT	SCC_ACCOM_LIC_2

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Staging Record Definitions	Staging Record Names	Production Record Names
Memberships	SCC_STG_MBRSHP	SCC_ACCOM_MBR_2
Names	SCC_STG_NAMES	SCC_PER_NAME_I2
National ID	SCC_STG_NID	HCR_PER_NID_I
Person Data (CAN)	SCC_PDECAN_STG	HCR_PER_CAN_I
Person Data (NZL)	SCC_PER_NZL_STG	SCC_PERSONL_NZL
Person Data (USA)	SCC_STG_PRSDATU	HCR_PER_USA_I
Person Data Effdt	SCC_STG_PDE	SCC_PER_EFF_H
Person Relationship	SCC_STG_RLSHIPS	RELATIONSHIPS
Person SA	SCC_STG_PERSSA	PERSON_SA
Phone	SCC_STG_PHONE	HCR_PER_PHONE_I
Port of Entry Data	SCC_STG_SEVPOED	SEV_POE_DATA
Publications	SCC_STG_PUBLIC	SCC_PUBL_I
Religious Preference	SCC_STG_RELPREF	RELIGIOUS_PREF
Residency Official	SCC_STG_RES_OFF	RESIDENCY_OFF
Residency Self	SCC_STG_RES_SLF	RESIDENCY_SELF
Scholarship Data (NLD)	SSR_SCL_NLD_STG	SSR_SCHOLAR_NLD
Student Bank Account (NLD)	SSF_BNK_NLD_STG	SSF_BANKACC_NLD
Student Career (Constituent)	SCC_STG_STD_CAR	STDNT_CAREER
Student Correspondence (NLD)	SSR_COR_NLD_STG	SSR_CORRSPN_NLD
Student Data (AUS)	SSR_STD_DAT_STG	SSR_STDNT_DATA
Student Information (NLD)	SSR_INF_NLD_STG	SSR_STD_INF_NLD
Student Names (NLD)	SSR_NME_NLD_STG	SSR_NAMES_NLD
Student Nationalities (NLD)	SSR_NAT_NLD_STG	SSR_EMP_NAT_NLD
Student Prior Education (NLD)	SSR_EDU_NLD_STG	SSR_STD_EDU_NLD
Student Report (CAN)	SSR_STG_CNRP_ST	CAN_RPT_STDNT
Test Score *	SCC_STG_TEST	STDNT_TEST
Tribal Affiliation (NZL)	SCC_IWI_TBL_STG	SCC_IWI_TBL
Visa Permit Data	SCC_STG_VISPMTD	SCC_VISA_PMT_I
Work Experience	SCC_STG_WORKEXP	SCC_PRIORWORK

* For coding purposes, this Recruiting and Admissions record is a child of the Constituent entity. The record is not displayed in the Constituent Staging component and cannot be configured for data update rule.

Note. You can extend this list or modify an existing staging record. See "Developer Reference for Creating a New CTM Consumer", Step 1: Creating or Extending Staging Tables section of this chapter.

The following table is a comparison of the structure of the address staging record with the structure of its matching production record.

Production Record (HCR_PER_ADDR_I)	Staging Record (SCC_STG_ADDR)
EMPLID - *Key*	SCC_TEMP_ID - *Key*
ADDRESS_TYPE - *Key*	ADDRESS_TYPE - *Key*

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Production Record (HCR_PER_ADDR_I)	Staging Record (SCC_STG_ADDR)
EFFDT - *Key*	SCC_ADDRESSAREA
EFF_STATUS	ADDR_TYPE_DESCR
ADDRESS_NPC_SBR	ADDRESS_SBR
COUNTRY	COUNTRY
ADDRESS1	ADDRESS1
ADDRESS2	ADDRESS2
ADDRESS3	ADDRESS3
ADDRESS4	ADDRESS4
CITY	CITY
NUM1	NUM1
NUM2	NUM2
HOUSE_TYPE	HOUSE_TYPE
ADDR_FIELD1	ADDR_FIELD1
ADDR_FIELD2	ADDR_FIELD2
ADDR_FIELD3	ADDR_FIELD3
COUNTY	COUNTY
STATE	STATE
POSTAL	POSTAL
GEO_CODE	GEO_CODE
IN_CITY_LIMIT	IN_CITY_LIMIT
ADDRESS1_AC	ADDRESS1_AC
ADDRESS2_AC	ADDRESS2_AC
ADDRESS3_AC	ADDRESS3_AC
CITY_AC	CITY_AC
REG_REGION	REG_REGION
	SCC_AUDIT_SBR
	SCC_ROW_ADD_OPRID
	SCC_ROW_ADD_DTTM
	SCC_ROW_UPD_OPRID
	SCC_ROW_UPD_DTTM

Transaction Staging Records

At the time of delivering this document, transaction staging tables were delivered only for the AAWS admission transactions. Therefore, if you create a transaction related to admissions data you could use those staging tables. If you create a new consumer of CTM, you need to create your own transaction staging tables based on the production records used by the transaction you want to integrate with CTM. For example, if you want to create an Online Donation transaction, you will need to create staging tables for the production tables used when entering a donation.

The following table is a comparison of the structure of the admissions academic interest staging record with the structure of its matching production record:

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Production Record (ADM_INTERESTS)	Staging Record (SCC_STG_ADMINT)
EMPLID - *Key*	SCC_TEMP_ID - *Key*
ACAD_CAREER - *Key*	ACAD_CAREER - *Key*
EFFDT - *Key*	
SEQNUM - *Key*	SEQNUM - *Key*
EXT_SUBJECT_AREA	EXT_SUBJECT_AREA
DESCR	DESCR
LS_DATA_SOURCE	LS_DATA_SOURCE
PRIORITY	PRIORITY
	SCC_AUDIT_SBR
	SCC_ROW_ADD_OPRID
	SCC_ROW_ADD_DTTM
	SCC_ROW_UPD_OPRID
	SCC_ROW_UPD_DTTM

Using Self-Service and Administrator Modes for Online CTM Transactions

When you create a CTM online user interface, you may want to create a self-service version (for example for your students to use) as well as an administrative version. The user interface for the latter can be designed for localized data entry requirements. The administrative version would allow an administrator to login and perform the transaction on behalf of a self-service user. In this case there will be no need to create a new User ID (performed through New User Registration) since the administrator will perform the transaction just as if a standard PeopleSoft Campus Solutions administrative component was used. However, you would take full advantage of the CTM utilities such as storing the data into staging tables, reviewing the staged data, and when ready promote the staged data to the production tables in accordance with the data update rule selected for the transaction. If the administrator did not know the ID for the self-service user, Search/Match could be automatically triggered to find a potential matching candidate.

There is no specific CTM setup to indicate if the transaction is being performed in self-service or in administrator mode. Instead, the logic is done directly from inside a user interface and in the web service request messages you create for a transaction. When administrator mode is used, the request message sent should include the <SCC_ADMIN_MODE> tag as well as any additional input parameters an administrator should populate, if any. When self-service mode is used, the tag should not be present. It is the user interface that dictates if the self-service or the administrator mode is used.

For examples of how this is done, see the request messages delivered with the following AAWS admission transaction service operations:

- SAD_CREATEAPPL
- SAD_GETAPPL
- SAD_GETAPPLS
- SAD_GETATTACH
- SAD_SAVEAPPL

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- SAD_SUBMITAPPL

For example, the request message for SAD_CREATEAPPL service operation when administrator mode is used includes:

```
<?xml version="1.0"?>
<SAD_CREATEAPPL_REQ xmlns="http://xmlns.oracle.com/Enterprise/HCM/services">
  <SCC_ADMIN_MODE>
    <INSTITUTION>PSUNV</INSTITUTION>
    <ADM_APPL_CTR>BUSN</ADM_APPL_CTR>
    <EMPLID>CCCM0001</EMPLID>
  </SCC_ADMIN_MODE>
```

In this case, INSTITUTION, ADM_APPL_CTR and EMPLID are input parameters passed when administrator mode is used.

Note. Specifying an EMPLID as part of the input parameters is optional when administrator mode is used. This is to cover the scenarios where the administrator may not know the ID for the person he or she is performing a transaction for. When no ID is passed, Search/Match attempts to identify or create an ID once the transaction is saved or submitted. If the administrator does specify the ID, Search/Match is not invoked and the ID is used to process the transaction.

Note. As part of the List of Values framework, the List of Values Setup page offers a way to set specific value when self-service mode is used and same for when administrator mode is used. The request message for the List of Values operation (SCC_LOV_REQ message) includes or does not include the <SCC_ADMIN_MODE> to differentiate the requests. See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up List of Values"

Note. The new user registration service operations (SCC_USERREG_CREATEACCT and SCC_USERREG_AUTHENTICATE) do not support the Administrator mode because only the self-service users can authenticate or create a user account for themselves.

New User Registration and CTM

The New User Registration framework consumes CTM. Delivered with your system is the New User Registration CTM transaction called NEW_USER_REGISTRATION. Only one CTM transaction can be set up for New User Registration transaction in your system. You can modify its configuration, but do not change its name.

The New User Registration online transaction can be combined with any other CTM online transactions. In fact, performing an online transaction might be done by anybody in the world, therefore unknown by your system (unknown user or guest user), or by somebody that already has a User ID and a password (returning user).

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When a user profile is created for a guest through New User Registration, an EMPLID is not associated. Once authenticated to your system, CTM allows the guest to complete a subsequent online transaction without having an ID (EMPLID) assigned. This is because the CTM transactions are keyed by Temporary ID (SCC_TEMP_ID) and not EMPLID. After the guest saves or submits the CTM online transaction, Search/Match is triggered and creates or identifies an EMPLID. When New User Registration is combined with a CTM online transaction, CTM also updates the user's user profile with the EMPLID retrieved or created by Search/Match.

This section discusses integrating New User Registration with a CTM online transaction.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Using New User Registration Framework", Understanding New User Registration, CTM and New User Registration

Integrating New User Registration with a CTM Online Transaction

This subsection discusses how to integrate a CTM online transaction that you have created with the New User Registration functionality.

Delivered with the New User Registration framework is a sample login page that can be customized for your institution security needs to allow a guest or a returning user to sign into your system. The sample login page allows the guest to create a new user ID and password and a returning user to use an existing user ID. This page is fully implemented with the CTM Transaction Code NEW_USER_REGISTRATION. Also delivered with the New User Registration framework is the concept of a New User Registration Context. In the New User Registration Context setup page, you define what should be the target page the user should be transferred to after being successfully authenticated. The target page can be the self-service online page used by your CTM online transaction. For example, if your CTM online transaction is created for *Online Admission Applications*, the target page defined in the context of using the New User Registration login page should be defined as your self-service online application page. That way a future applicant will not need to navigate to a specific page. He or she will be automatically transferred to the proper page.

Note. The New User Registration framework knows nothing about the subsequent online transaction (whether it is a CTM online transaction or not). They share the same constituent staging tables (if constituent information is requested at registration time) and the target page defined in the New User Registration Context ID is optional. New User Registration only facilitates the navigation orchestration of your guests or returning users wanting to perform an online transaction that requires signing into your system.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Using New User Registration Framework", New User Registration Sample User Interfaces - for examples of what the login or the registration page can look like.

Note. Once the system has authenticated the user, it is also an appropriate time for your CTM online transaction user interface to perform any initialization or setup to prepare the user for data entry into the online transaction. Such setup may include requesting for a bulk list of values data that the user interface can subsequently display to the user. Performing this activity up front may result in a general performance improvement and improved user experience. In order to do that, formulate a bulk *List-Of-Values* request message by submitting the request message to the SCC_GET_LOV service operation. Store the List-Of-Values results in a temporary storage area for use throughout the online transaction functioning.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Setting Up List of Values"

CTM generates a New User Registration transaction when the self-service user registers to your system (guest users only).

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Note. When CTM generates a New User Registration transaction, Search/Match is not triggered. It is assumed that at this time, the constituent data is not sufficient and might be invalid. Only at the time of performing a subsequent true transaction (CTM transaction not marked as New User Registration), Search/Match gets triggered.

Warning! The New User Registration process needs to occur at the initial point of entry for accessing your online user interface. Doing so allows for giving the self-service users appropriate access to the web services that will later be used. In other words, the user cannot be authenticated to your system after performing the online transaction.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Using New User Registration Framework", Developer Reference to Deploy New User Registration

Entity Registry and CTM

The CTM framework uses the Entity Registry feature for processing the staged information. Each staging record used by a CTM transaction requires an entity defined in the Entity Registry component.

The entities associated with the core constituent staging records are delivered with your system. If you created new constituent staging records or created transaction staging records, for each of them you need to create an entity. Review the delivered entities and modify their default setup according to your requirements.

The Entity Registry feature also enables you to easily create application classes and message schemas for the web services a CTM transaction uses.

Delivered Entities Related to Constituent Data

The following table lists the delivered constituent entities at the time of delivering this chapter.

Entity ID	Entity Name
SCC_ENTITY_20090521043203 *	Academic History
SCC_ENTITY_20090520153253 *	Academic Interests Header
SCC_ENTITY_20090520155755	Address
SCC_ENTITY_20091125152646	CHESSN (AUS)
SCC_ENTITY_20091126103906	CHESSN Prior HEP (AUS)
SCC_ENTITY_20091126111803	CHESSN Year 12 (AUS)
SCC_ENTITY_20090519160928	Citizenship
SCC_ENTITY_20091126094410	Citizenship History (AUS)
SCC_ENTITY_20090727142755	Disability
SCC_ENTITY_20090521053232	Diversity
SCC_ENTITY_20090727122912	Drivers License
SCC_ENTITY_20090521044252	Email Address
SCC_ENTITY_20090723101739	Emergency Contact
SCC_ENTITY_20090520151536	External System Key
SCC_ENTITY_20090520152753	Extracurricular Activity

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Entity ID	Entity Name
SCC_ENTITY_20090520034905 *	General Materials
SCC_ENTITY_20100120113706	HESA Person (UK)
SCC_ENTITY_20091201160101	Higher Ed Student Data (NLD)
SCC_ENTITY_20090520153127	Honors and Awards
SCC_ENTITY_20090520034508	Language
SCC_ENTITY_20090520034153	Licenses and Certificates
SCC_ENTITY_20090519141839	Memberships
SCC_ENTITY_20090521053330	Names
SCC_ENTITY_20090520155342	National ID
SCC_ENTITY_20091126154843	Person Data (CAN)
SCC_ENTITY_20091202124323	Person Data (NZL)
SCC_ENTITY_20090520035051	Person Data (USA)
SCC_ENTITY_20090520155540	Person Data Effdt
SCC_ENTITY_20090520144339	Person Relationship
SCC_ENTITY_20090520154002	Person SA
SCC_ENTITY_20090520155634	Phone
SCC_ENTITY_20090520035753	Port of Entry Data
SCC_ENTITY_20090917022051	Publications
SCC_ENTITY_20090520153904	Religious Preference
SCC_ENTITY_20090520152610	Residency Official
SCC_ENTITY_20090520152928	Residency Self
SCC_ENTITY_20091201145851	Scholarship Data (NLD)
SCC_ENTITY_20091130122625	Student Bank Account (NLD)
SCC_ENTITY_20090520153020	Student Career (Constituent)
SCC_ENTITY_20091130134055	Student Correspondence (NLD)
SCC_ENTITY_20091126120241	Student Data (AUS)
SCC_ENTITY_20091201162844	Student Information (NLD)
SCC_ENTITY_20091201143403	Student Names (NLD)
SCC_ENTITY_20091201135712	Student Nationalities (NLD)
SCC_ENTITY_20091130160704	Student Prior Education (NLD)
SCC_ENTITY_20091126132815	Student Report (CAN)
SCC_ENTITY_20090520152126 *	Test Score
SCC_ENTITY_20091202113740	Tribal Affiliation (NZL)
SCC_ENTITY_20090520035455	Visa Permit Data
SCC_ENTITY_20090520154055	Work Experience

* For coding purposes, this Recruiting and Admissions record is a child of the Constituent entity. The record is not displayed in the Constituent Staging component and cannot be configured for data update rule.

See "Developer Reference for Creating a New CTM Consumer", Step 3: Creating Entities section in this chapter for more information on how to create new entities.

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See Also

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, “Setting Up Entity Registry"

External Search/Match and CTM

CTM is integrated with External Search/Match. External Search/Match can only be run for one person at a time (batch is not supported at the time of publication of this chapter). Therefore, CTM triggers the External Search/Match services in the following scenarios:

- *Realtime:* Occurs through an online transaction, when a guest user is unknown to the Campus Solutions system (that is, no EMPLID is passed for the user). At Save or Submit time, when Search/Match is set to be processed *Realtime*, the Search/Match/Post process triggers. If External Search/Match is enabled, CTM calls the External Search/Match services. The search results are interpreted exactly like what the Campus Solutions system does for the internal Search/Match. For processing the realtime transaction, the Campus Solutions system uses the Search/Match configuration that is set up in the Transaction Setup component for the transaction that is being processed. Note that if the Search/Match configuration for 1 Match Found = Update, and the one matching candidate comes from the external system, then the Campus Solutions system first automatically imports the constituent data for the matching candidate and creates an EMPLID. Then, the Campus Solutions system *updates* the EMPLID with the data that was entered by the guest user.
- *Manually:* Occurs when an administrator analyzes the data that appears in the Constituent Staging component for a specific Temporary ID and clicks the Search/Match Results link. Because this is also performed for a single person, External Search/Match is triggered and the search results page shows matching candidates from internal Search/Match and/or External Search/Match depending on the results. This is exactly the same behavior if you use the Search/Match Integrated component to perform the search.

Note. External Search/Match does not support searches in batch, therefore, the CTM Transaction Management batch process does not trigger External Search/Match.

See Also

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, “Setting Up Search/Match”

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, “Setting Up External Search/Match”

List of Values Framework and CTM

Self-service user interfaces (such as an online CTM transaction) constructed outside of your PeopleSoft Campus Solutions database may contain data fields that have predefined or *prompt* values used to control and streamline data entry for the user. If you want to display these values that are set up inside your PeopleSoft Campus Solutions database, whether it is for a prompt field or a field that contains translate values, the List of Values web service operation (SCC_GET_LOV) can be used. The web service recognizes and provides the values that are used to populate drop-down list boxes on a user interface and for validating selections.

See Also

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, “Setting Up List of Values"

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Setting Up CTM

This section discusses:

- Setting up counter.
- Setting up a transaction.
- Defining the search/match criteria.
- File Parser and CTM.
- Defining data updates rules.
- Setting Up affiliation overrides for a data update rule.

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Pages Used to Set Up CTM

Page Name	Definition Name	Navigation	Usage
Counter Setup	SCC_AWS_FIX_CTRS	Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmnt, Counter Setup	Set up the max ID number for the Temporary Constituent ID.
Transaction Setup	SCC_TRANSAC_DTLS	• Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup • Student Admissions, UCAS Processing, Search/Match Processing, Transaction Setup	Define the transaction for an online transaction or an offline transaction.
Search/Match Setup	SCC_SEARCH_PARMS	• Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup, Search/Match Setup • Student Admissions, UCAS Processing, Search/Match Processing, Transaction Setup, Search/Match Setup	Define the Search/Match criteria for an online transaction or for running Search/Match manually from the Constituent Staging component. Not applicable for the user registration transaction.
Data Update Rule Entry	SCC_DUR_ENTRY	Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Data Update Rule Entry	Define the rules to update specific constituent data stored in the production tables, with incoming data from the staging records. Not applicable for the user registration transaction.
Affiliation Overrides	SCC_DUR_AFL_OVRD	Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Data Update Rule Entry, Affiliation Overrides	Override a data update rule based on the affiliation the constituent has with the academic institution. Not applicable for the user registration transaction.

Setting Up Counter

Access the Counter Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmnt, Counter Setup).

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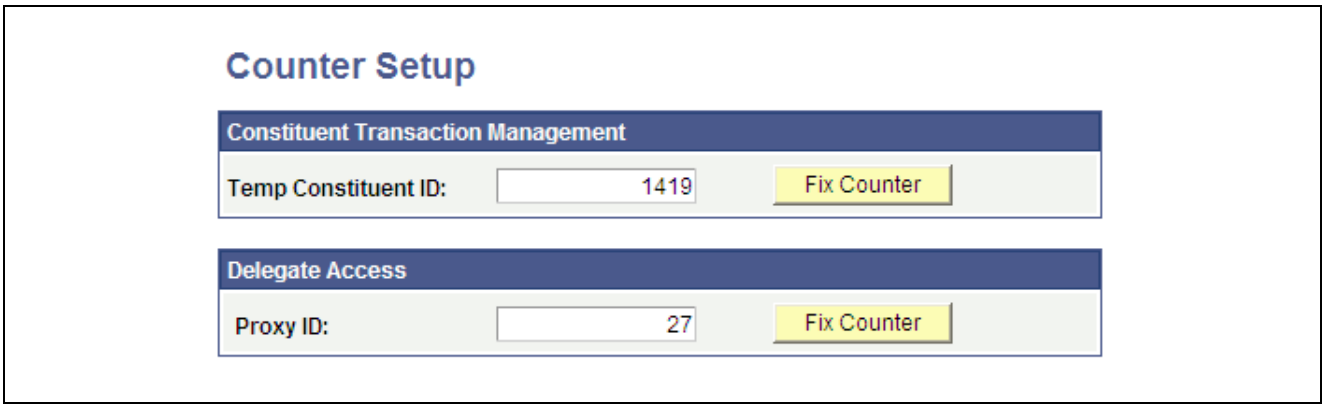

Counter Setup page

Constituent Transaction Management

The system automatically increments the Temp Constituent ID field by one when CTM generates a transaction. Set the last used number so that automatic numbering does not create numbers that already exist in the data.

Temp Constituent ID Displays the last Temporary Constituent ID assigned. The system assigns a Temp Constituent ID when CTM generates a transaction. The value assigned is the value for the SCC_TEMP_ID key field.

See "Setting Up CTM," Setting Up a Transaction section

Fix Counter Clicking this button resets the Temp Constituent ID based on the highest value of that field in the database. The field is dynamically found based on the Peopletools metadata for the record field relationships, and the maximum possible value for that field across all possible records is set as the counter. This avoids the possibility of the system trying to reuse an ID and being polluted by pre-existing data.

Delegate Access

The system automatically increments the Proxy ID field by one when a delegator creates a new proxy. Set the last used number so that automatic numbering does not create numbers that already exist in the data.

Proxy ID Displays the last Proxy ID assigned. The system assigns a Proxy ID when a delegator creates a new proxy (new contact) in the Share My Information component. The value created is used programmatically and not displayed on pages.

Fix Counter Clicking this button resets the Proxy ID based on the highest value of that field in the database. The field is dynamically found based on the Peopletools metadata for the record field relationships, and the maximum possible value for that field across all possible records is set as the counter. This avoids the possibility of the system trying to reuse an ID and being polluted by pre-existing data.

Note

After you have begun using the CTM functionality, you can access this page to determine the last number that was incremented for the Proxy ID or the Temporary Constituent ID. Manually changing this number is practical for the initial setup, but not recommended for further changes. If the ID entered is changed to an existing number, the system will attempt to re-use the ID. Instead use the Fix Counter button.

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Setting Up a Transaction

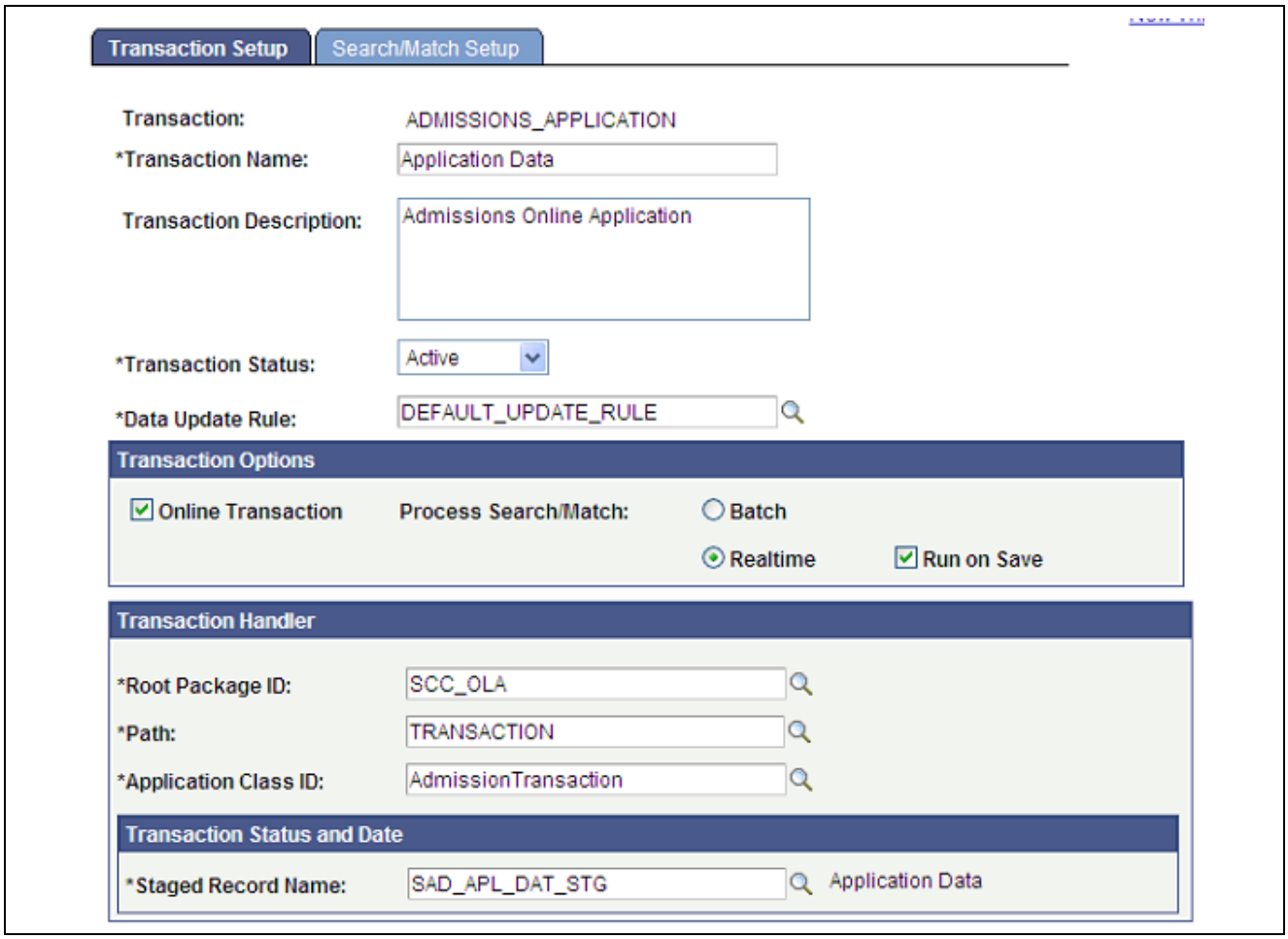
Access the Transaction Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup).

Bundle 29

Documentation-only update — no code change:

The following sentence explaining the screen shot has been added.

The following is an example of how a delivered CTM transaction involving both constituent and transaction-specific data can be set up (note that the Transaction Handler section contains an application class specific to the created admissions transaction):



Transaction Setup page (1 of 2)

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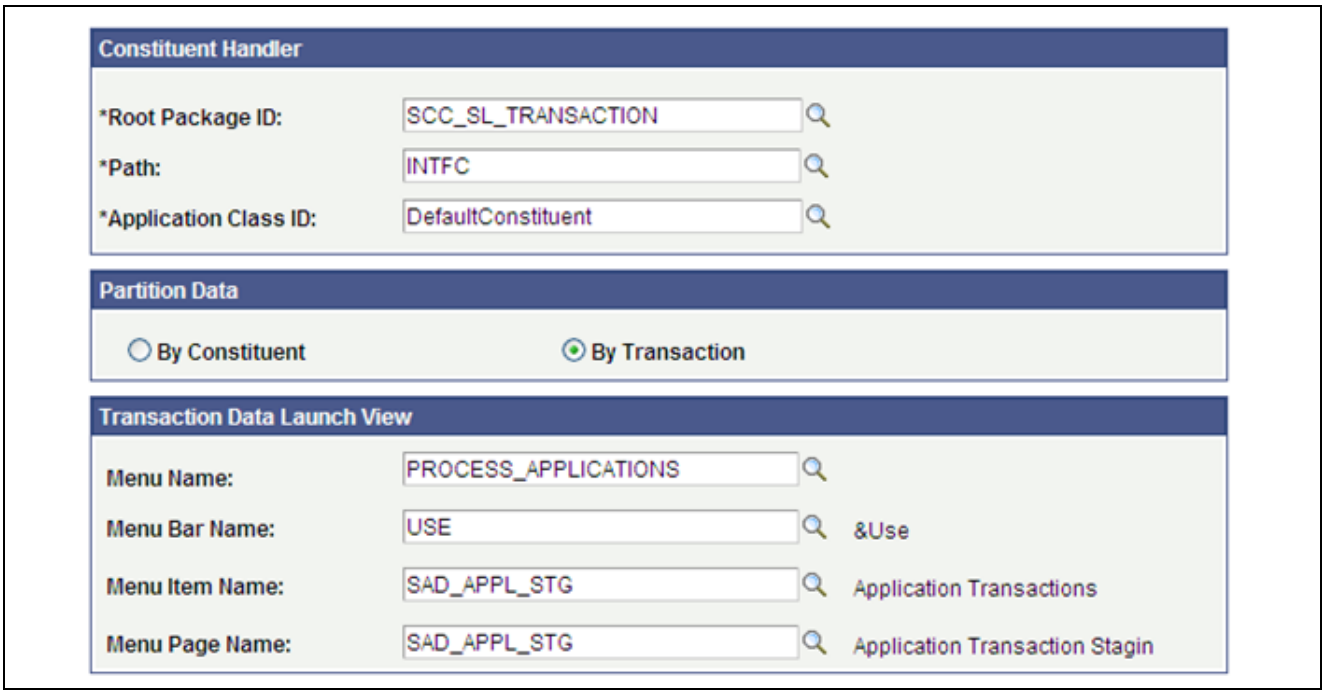

Transaction Setup page (2 of 2)

Bundle 29
Documentation-only update — no code change:
The following paragraph and screen shot have been added.

The following is an example of how a delivered CTM transaction involving only constituent data can be set up. Note that the Transaction Handler section contains the delivered application class handling only the constituent data and the data is partitioned *By Constituent* (because no transaction-specific data exists, selecting *By Transaction* is not logical):

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Transaction Setup | Search/Match Setup

Transaction: DELEGATE_ACCESS

*Transaction Name: Delegated Access

Transaction Description: Generic CTM transaction used by Delegated Access framework to assign an EMPLID to the proxies.

*Transaction Status: Active

*Data Update Rule: DEFAULT_UPDATE_RULE

Transaction Options

☑ Online Transaction

Process Search/Match: ◉ Batch ○ Realtime

Transaction Handler

*Root Package ID: SCC_CTM

*Path: TRANSACTION

*Application Class ID: DefaultTransaction

Transaction Status and Date

*Staged Record Name: SCC_DFLT_TRANS Default Transaction Status rec

Transaction setup involving only constituent data (1 of 2)

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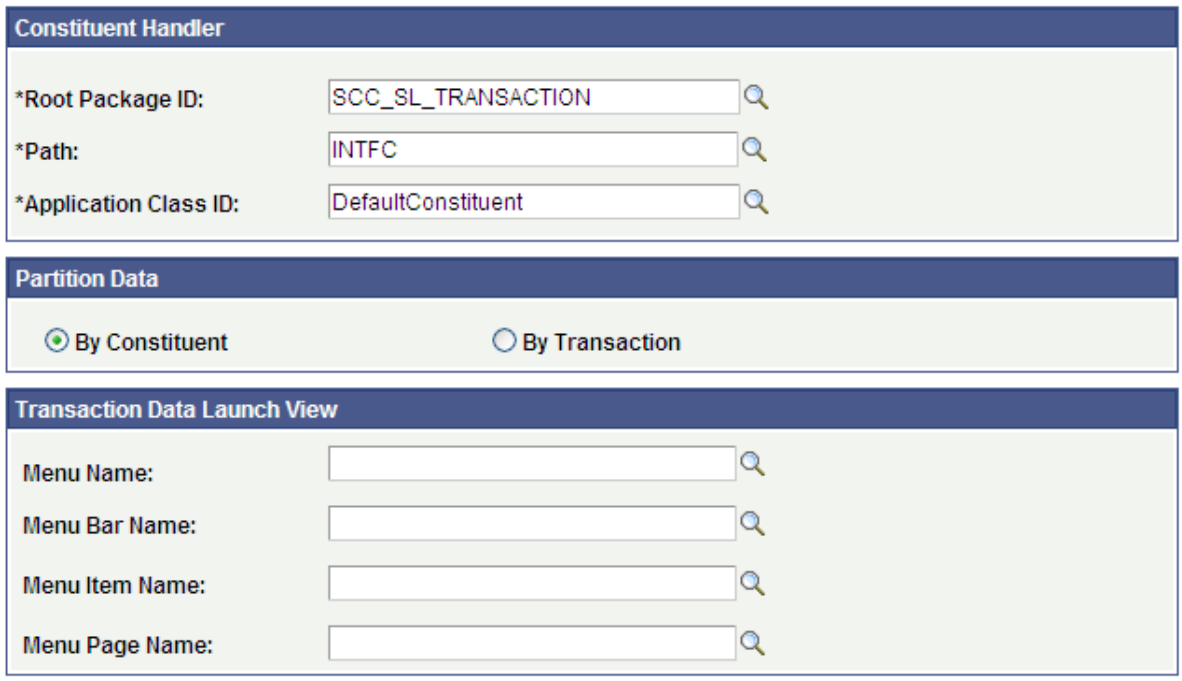

Transaction setup involving only constituent data (2 of 2)

The following is how the delivered New User Registration transaction is set up:

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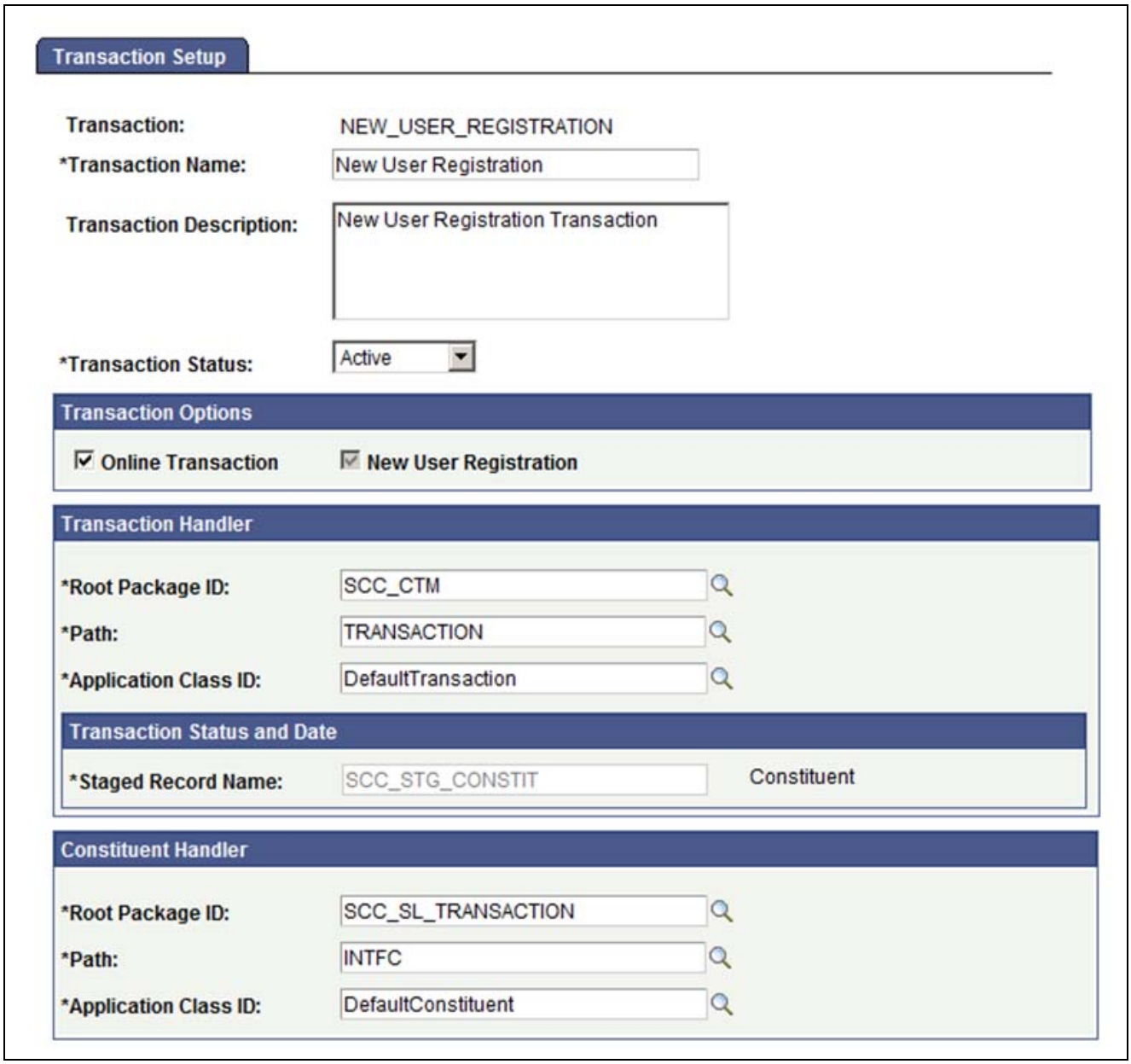

Transaction Setup page: New User Registration transaction

Transaction Indicates the transaction code.

You specify the transaction code when you add a transaction.

Transaction Status Activate or inactivate the transaction. The field is used for informational purpose only. No coded logic is delivered with this field.

Data Update Rule Select the data update rule that you want the system to apply to the constituent data managed by this transaction. You define a data update rule in the Data Update Rule Entry page.

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Transaction Options

Online Transaction

Select to indicate that the transaction is performed online by a user. For example, an online transaction occurs when an applicant saves or submits an admission application through AAWS.

Clear this check box to indicate that the transaction is performed offline by a user. For example, an offline transaction occurs when you use File Parser to load applications from a text file.

New User Registration

Select to indicate that the transaction is used to perform registration and authentication of a new user.

If you select this check box, the system hides the Search/Match Setup tab, the Partition Data group box, and the Transaction Data Launch View group box, because they are not applicable for a new user registration transaction.

Note. Your system allows for only one transaction to be set as new user registration at a time. The NEW_USER_REGISTRATION transaction is delivered with your system. Because of this restriction, the system hides the New User Registration check box for all other transactions. Do not modify the NEW_USER_REGISTRATION transaction name because the system uses the name to register a user account.

Batch

Select if you do not want the system to immediately process Search/Match when the data is individually submitted. If you select this option, the system stores the submitted data in staging tables and you will need to run the Transaction Management process to run Search/Match and post the submitted data to Campus Solutions.

When you deselect the Online Transaction check box, the system automatically selects and disables the Batch option. In other words, because the transaction will be processed offline, Search/Match can only be processed by Batch.

Realtime

Select to have the system immediately process Search/Match when the data is saved or submitted from an online transaction.

Run on Save

This check box appears if the Realtime check box is selected.

Select this check box if you want the system to immediately run Search/Match when a user *saves* a transaction. Clear this check box if you want the system to immediately run Search/Match when a user *submits* a transaction.

Warning! Selecting Run on Save will trigger Search/Match immediately after user saves the transaction. Make sure your user interface requires sufficient personal information to be entered so that there is enough data to populate the search criteria used by Search/Match. Otherwise, Search/Match could create a new ID or update an existing record with erroneous or missing information. Any subsequent saves prior to submit will update production constituent data if an EMPLID is assigned dependent on your data update rule settings.

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Transaction Handler

A transaction can contain generic information about a constituent (such as names, addresses, and date of birth), as well as data specific to the transaction. For example, an admission online application transaction will include personal information (constituent data) and application data (transaction data). You can use the Transaction Handler group box to define how the system should handle all the transaction data. You can create your own PeopleCode application class handler for the transaction data and then associate that application class with the transaction in this group box.

See "Developer Reference for Creating a New CTM Consumer", Step 7: Setting Up a Transaction section of this chapter for information about how to create the application class.

Bundle 29
Documentation-only update — no code change:
The following paragraph and table have been updated.

The following table lists the delivered transaction handler values and Staged Record Name value for the New User Registration transaction (NEW_USER_REGISTRATION) or for transactions that only involve constituent data. Do not change these values for New User Registration.

Root Package ID	Path	Application Class ID	Staged Record Name
SCC_CTM	TRANSACTION	DefaultTransaction	SCC_STG_CONSTIT

Bundle 29
Documentation-only update — no code change:
The following paragraph and table have been added.

The following table lists the delivered transaction handler values and Staged Record Name value for transactions that only involve constituent data.

Root Package ID	Path	Application Class ID	Staged Record Name
SCC_CTM	TRANSACTION	DefaultTransaction	SCC_DFLT_TRANS

Transaction Status and Date

The system needs a record in transaction staging tables where it can store the status of the transaction (SCC_TRANS_STS) as well as the transaction status date (SCC_TRANS_STS_DT). These two fields keep track of the status of the transaction code and time stamp of any changes in staging records. The Staged Record Name field indicates the record where the transaction status and the transaction status date are stored.

The transaction staging record you select here must include the following fields:

- SCC_TEMP_ID (key field)
- SCC_TRANSAC_CD
- SCC_TRANS_STS
- SCC_TRANS_STS_DT
- SCC_AUDIT_SBR record for audit tracking
- Any other fields related to your transaction

Bundle 29
Documentation-only update — no code change:
The following note has been added.

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Note. The NEW_USER_REGISTRATION transaction is an exception to the above rule. The transaction is set up with the Staged Record Name SCC_STG_CONSTIT that does not contain the SCC_TRANS_STS and the SCC_TRANS_STS_DT fields. The reason is that a New User Registration transaction can either be posted or not. Therefore, its transaction status gets automatically set to *Posted*. The record stores the constituent staging status field value (SCC_STG_STATUS) and the constituent staging status date field value (SCC_STG_STS_DT) for the New User Registration transaction. SCC_STG_CONSTIT is also used across all CTM transactions as it holds basic constituent data used inside the Constituent Staging component.

Bundle 29
Documentation-only update — no code change:
The following paragraph has been added.

SCC_DFLT_TRANS is another delivered staged record name that can be used for transactions that only involves constituent data (the data manipulated inside the transaction is only applicable to constituent information, not to any transaction-specific data).

For an example of how a staging record name is created and used for CTM transactions involving both constituent and transaction-specific data, review the delivered AAWS admissions transaction staging record SAD_APL_DAT_STG.

See "Developer Reference for Creating a New CTM Consumer", Step 7: Setting Up a Transaction section of this chapter for information about how to create the application class.

Constituent Handler

Use the Constituent Handler group box to define how the system should handle the constituent data in a transaction. You can create your own PeopleCode application class handler for the constituent data and then associate that application class with the transaction in this group box.

The default application class that handles the constituent data is delivered with the system. You can modify this application class or create a new application class.

The following table lists the default constituent handler values. You should always use these values when defining the constituent handler values for an online transaction or batch load transaction.

Root Package ID	Path	Application Class ID
SCC_SL_TRANSACTION	INTFC	DefaultConstituent

See "Developer Reference for Creating a New CTM Consumer", Step 7: Setting Up a Transaction section of this chapter for information about how to create the application class.

Partition Data

Use the following options to indicate how the system should maintain the data in the staging tables.

By Constituent

Select this option to have the system maintain only one instance of the constituent data for all transactions of the constituent (that is, One Constituent : Multiple Transactions ratio). This means that constituent data updates performed within a single transaction are visible across all other subsequent transactions. An example of the By Constituent impact: An applicant (user ID: Gina) has used an online application to register for a user account and then, later on, saved or submitted four admission applications. The system creates a total of five transactions for Gina, one transaction for user registration and four transactions for the four applications. For all the five transaction records, the

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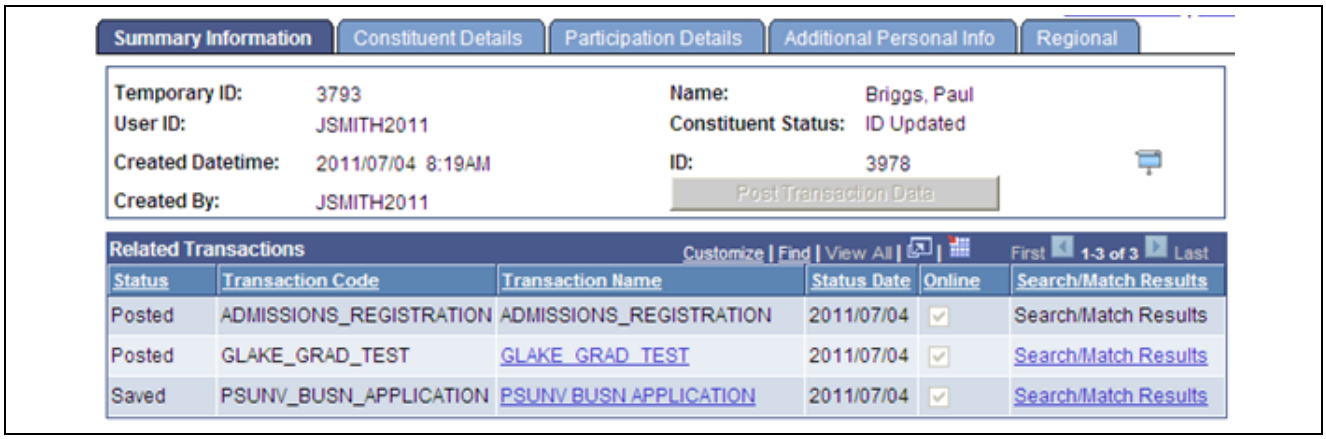
system maintains a single constituent record. Gina updates her email address when saving or submitting the fourth application. The system updates Gina's constituent record with the new email address.

By Transaction

Select this option to have the system maintain a separate instance of constituent data for every transaction of the constituent (that is, One Constituent : One Transaction ratio). This means that constituent data updates performed within a single transaction are not visible across all other transactions. An example of the By Transaction impact: An applicant (user ID: Jason) has used an online application to register for a user account and then, later on, saved or submitted four admission applications. The system creates a total of five transactions for Jason. For all the five transaction records, the system maintains five constituent records of Jason. Jason updates his email address when saving or submitting the fourth application. The system updates Jason's constituent record related to the fifth transaction with the new email address but does not update his other four constituent records.

If you have selected By Constituent, the Summary Information page of the Constituent Staging component displays multiple transaction rows in the Related Transactions region (if multiple transactions exist for the constituent). When you search for transactions of a user who has multiple By Constituent transactions, the Constituent Staging component automatically displays the Summary Information page of the user with the related transactions. In the following example, the partition data by constituent option has been selected for the GLAKE_GRAD_TEST and PSUNV_BUSN_APPLICATION transactions and, therefore, the Summary Information page displays for the constituent Paul, the two application transactions he applied to, on a single page.



Partition Data By Constituent (Summary Information page)

If you have selected By Transaction, the Summary Information page of the Constituent Staging component always displays only one transaction row in the Related Transaction region (even if multiple transactions exist for the constituent). When you search for transactions of a user who has multiple By Transaction transactions, the Constituent Staging component displays multiple search results. In the following example, the partition data by transaction option has been selected for the PSUNV_UENG_APPLICATION and ADMISSIONS_APPLICATION transactions and, therefore, the system displays multiple search results for the constituent Sarah Dominguez.

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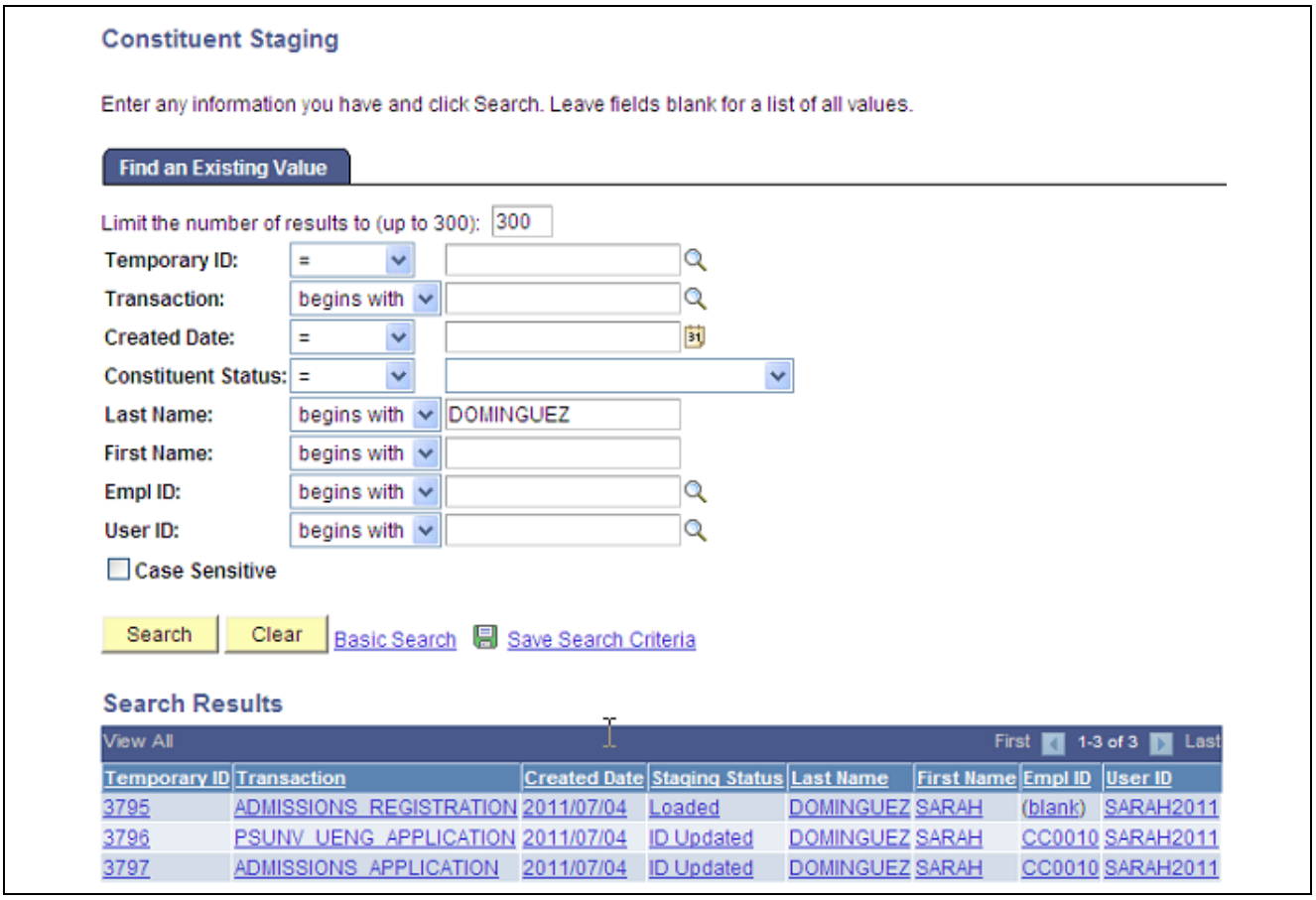
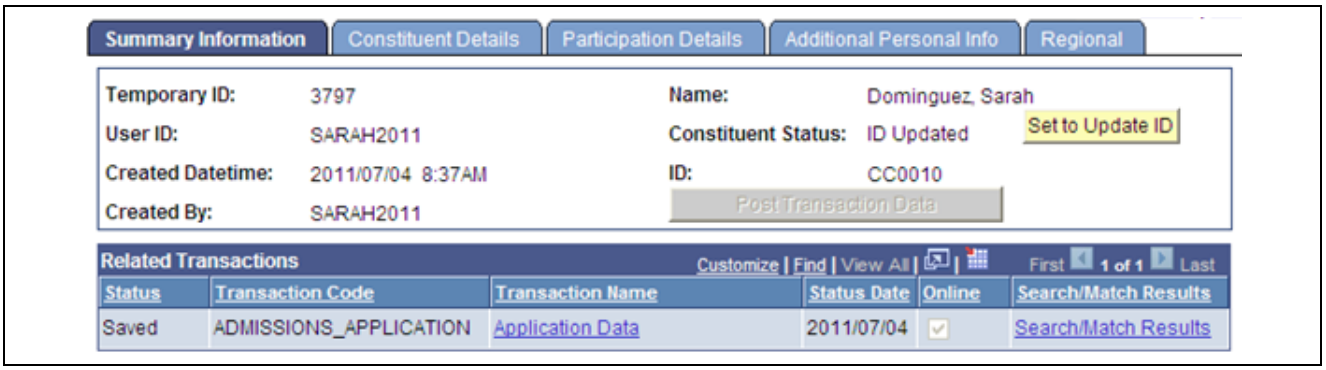


Partition Data By Transaction (search results)

In the following example, you can see that the Summary Information page displays only one application transaction for the constituent because the partition data by transaction option has been selected for the ADMISSION_APPLICATION transaction:



Partition Data By Transaction (Summary Information page)

If you have selected the partition by transaction option, the system assigns a unique temporary ID to each transaction that the system generates for the constituent. If you have selected the partition by constituent option, the system assigns a unique temporary ID to all the transactions that the system generates for the constituent.

See “Processing Staged CTM Transactions" section in this chapter for information on the Constituent Staging component.

For the New User Registration transaction, partitioning is not applicable.

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Note. When using the administrator mode, the system always generates a temporary ID for each application that an administrator creates, regardless of whether you have selected the By Transaction or By Constituent option. In other words, the system does not support partition by constituent for the administrator mode.

Note. When creating multiple transactions that use the same transaction staging records, we recommend setting those transactions with the same partitioning option. For instance if you choose to partition by Transaction, do so for all of those transactions. If your choice is partition by constituent, the same applies. You create multiple transactions if you want to use different Data Update Rule values, different Search/Match configuration, or if you added your own logic based on transaction name.

Transaction Data Launch View

This group box indicates the location of the staging component created for the transaction. The information given here allows users to access the transaction staging component by clicking a link on the Constituent Staging component. This link that transfers the user to the transaction staging component is labeled with the Transaction Name. The link is displayed on the Related Transactions grid of the Summary Information page of the Constituent Staging component.

The Transaction Data Launch View group box is not available for user registration. Therefore, by default, the Summary Information page does not display a link for the user registration transaction.

See "Processing Staged CTM Transactions", Reviewing Constituent Information section for more information about the transfer link.

Defining the Search/Match Criteria

Access the Search/Match Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup, Search/Match Setup).

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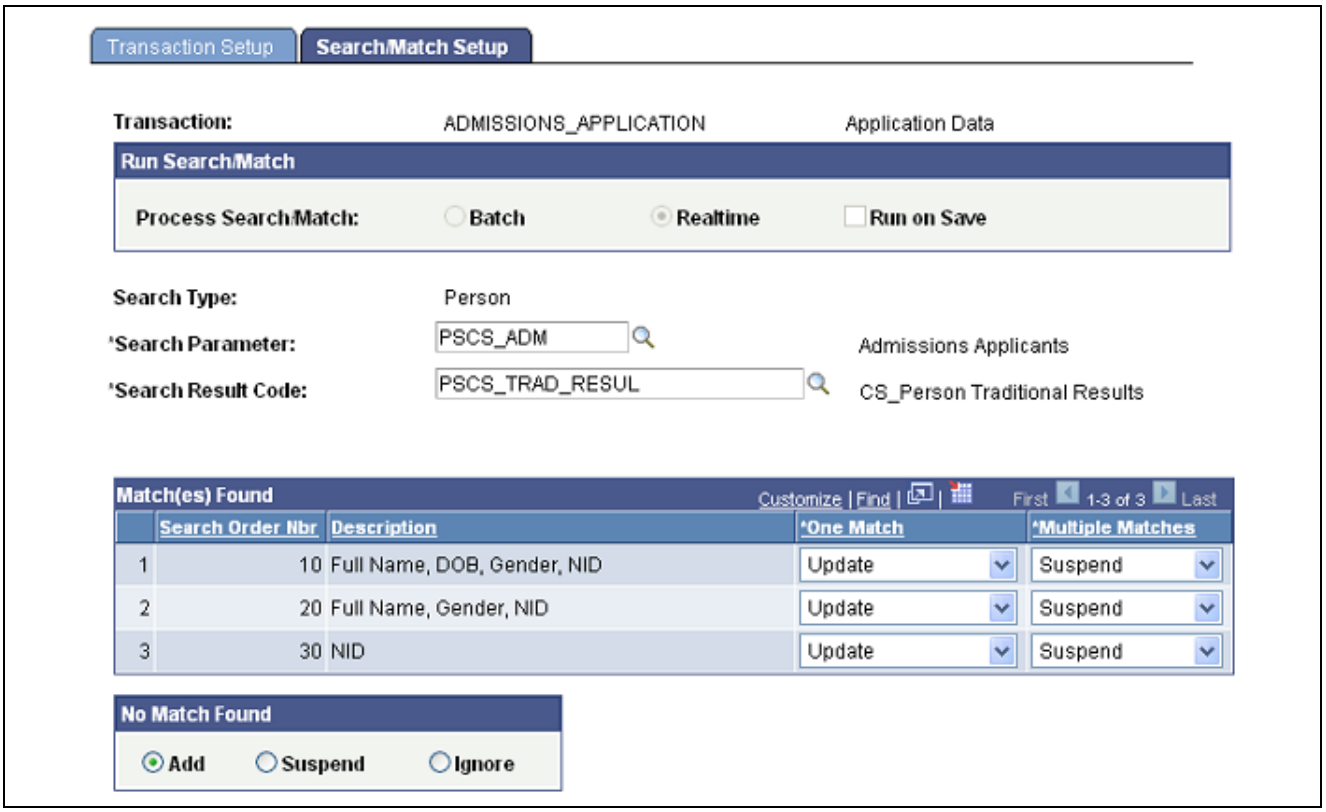

Search/Match Setup page

Each transaction has its own Search/Match configuration. This allows for flexibility.

Note. The words “Parameters Refreshed” appear if this is the first time you have entered this page, or if the setup of any of the parameters on this page changed since the last time you accessed this page.

Batch, Realtime, and **Run on Save**

Indicates the Search/Match options you have selected on the Transaction Setup page. These options are discussed in the "Setting Up CTM", Setting Up a Transaction section.

Select a Search Type, Search Parameter, Search Result Code, and other search fields as appropriate. The values selected on this page are used behind the scenes when Search/Match or External Search/Match is processed *Realtime* at the time the user saves or submits an online transaction and *manually* from the Summary Information page when an administrator triggers Search/Match by clicking the Search/Match Results link for a specific transaction.

To set up Search/Match when set to process by *Batch*, the information given here is defaulted inside the Transaction Manager run control component and can be modified from there. See the “Specifying Search/Match Parameters for Batch Processing” section.

Note. Transaction Manager supports only person searches at this time. Therefore, the Search Type field defaults to *Person* and only Search Parameter and Search Result Code values set up for *Person* are valid.

For information about setting up Search/Match rules, order, parameters, and results:

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up Search/Match”

For information on how external Search/Match is used:

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See “External Search/Match and CTM” section of this chapter.

Match(es) Found

This group box contains one row for each search rule defined in the Search Parameter selected. Define Search/Match orders and Search/Match rules on the Search/Match Rule page.

Search Order Nbr (search order number)

For each order number, select what you want to do with the incoming record if the search/match/post process discovers one or more matching records.

One Match and **Multiple Matches**

Select whether you want to add, update, suspend, or ignore matching records:

- *Add:* Add a new record to your database using the data from the staging table record.
- *Update:* Update the existing record in your database using the data from the staging table record.

Note. Updates are dependent on what has been defined as update rules on the Data Update Rule Entry component. The Data Update Rule component is discussed in the "Setting up CTM", *Defining Data Update Rules* section of this chapter.

- *Suspend:* Suspend any processing of the staging table record. Use the Constituent Staging component to determine manually whether or not this staged record matches a record in your database. The Constituent Staging component is discussed in the “Processing Staged CTM Transactions” section of this chapter.
- *Ignore:* Ignore the staging table record that matched a record in your database.

No Match Found

Select one of the following options to specify what Search/Match should do when it does not find a matching record in your database or the external system if you use External Search/Match:

- *Add:* Add the unmatched record, including personal data, to your database.
- *Suspend:* Keep the unmatched record in the staging tables to be looked at manually. Use the Constituent Staging component to review the record.
- *Ignore:* Ignore the unmatched record completely. Use the Constituent Staging component to review the record.

Note. You cannot define a Search/Match setting for the user registration transaction. The new user registration feature does not ask the user enough personal information for creating a new ID. Also, a new user may create a user ID and password without ever coming back to fill out an online application. The information entered as part of the new user registration process is therefore kept in the constituent data staging table until the user actually performs a transaction.

File Parser and CTM

When creating an *offline* transaction (you did not select the Online Transaction check box on the Transaction Setup page), you can take advantage of the PeopleSoft File Parser utility to load data from an external file into Campus Solutions. The external file can be a delimited file or a flat file.

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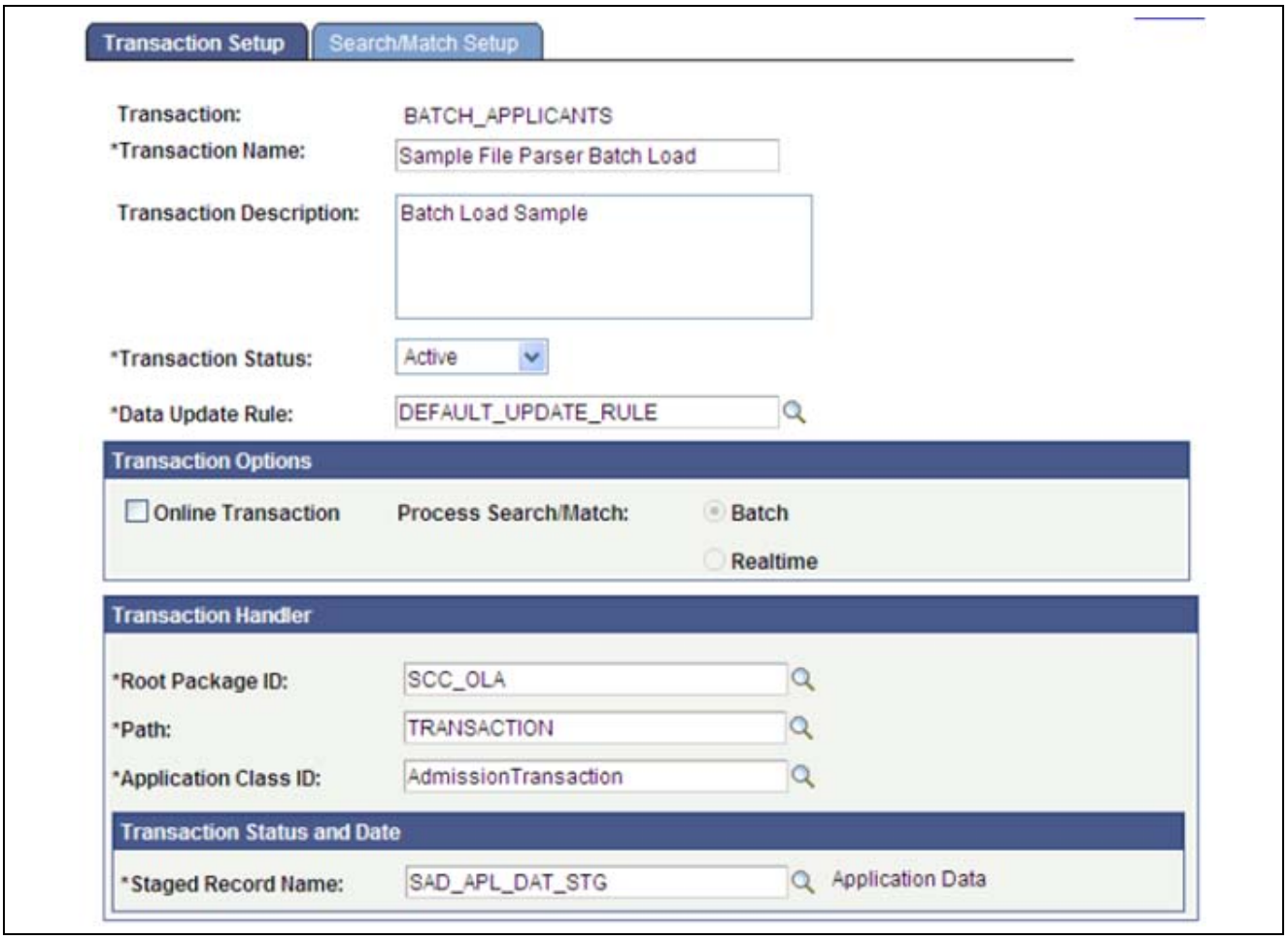
To load data from an external file perform the following steps:

1. Set up the CTM transaction (you will need the transaction code in the next step).
2. Set up File Parser definitions.
3. Run the File Parser process to load the data into staging tables.
4. Review the staged data.
5. Run the Transaction Management Process to post the staged data into the production records.

When setting up the offline CTM transaction on the Transaction Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt), you must deselect the Online Transaction check box. The Batch option for processing Search/Match gets automatically selected.

This is an example of a CTM transaction set up for loading data in batch into the staging tables:



Transaction Setup page: File Parser batch load transaction (1 of 2)

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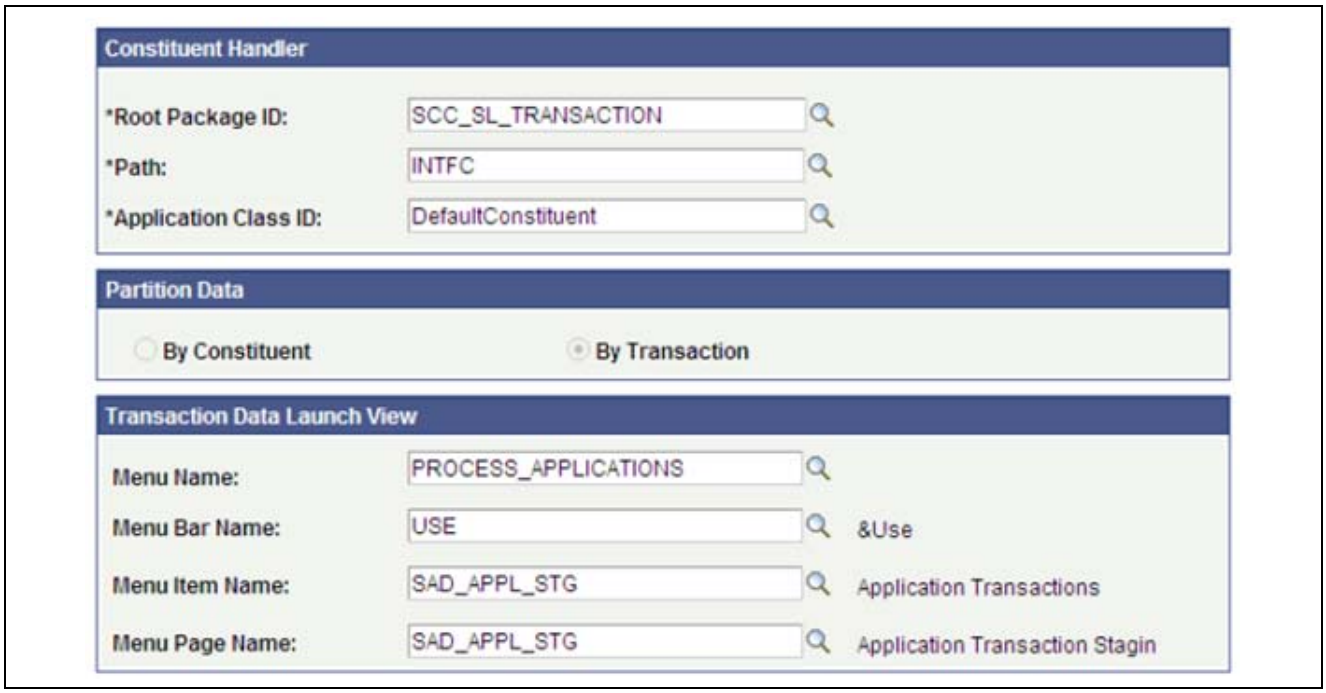

Transaction Setup page: File Parser batch load transaction (2 of 2)

When setting up File Parser, set up the desired transaction code for the batch load on the Mapping page of the File Mapping Definition component. You can set this code as a default value (by default, the SCC_TRANSAC_CD field in the SCC_STG_CONSTIT record stores the transaction code). The File Parser process can also retrieve the transaction code directly from the load file (in such a case, set the mapping action to Direct from file).

Also, it is required to at least include the following constituent staging records on the Context Definition page (Set Up SACR, System Administration, Utilities, File Parser, Context Definition):

- SCC_STG_CONSTIT. It is required to set the following fields, even though they are not necessarily required in the record:
  - SUBMITTED – Default to *N*
  - SCC_TRANSAC_CD – Set according to Transaction Setup
  - SCC_STG_STATUS – Default to *LD* (Loaded)
  - SCC_STG_STATUS_DT – Default to *%Date*
- SCC_SL_TRNMAP (Force Insert)
- SCC_STG_NAMES
- SCC_STG_PERSSA (should be set with *Force Insert* if no incoming fields are mapped)

Note. There might be transaction staging records that are also required to be defined on the Context Definition page. Review the related transaction entities using the Entity Registry component to determine the additional records.

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Warning! When using a file to upload data into the staging records, do not populate the EMPLID field with a value that the system has not yet created in the production database. If you provide an EMPLID value that does not exist in the production database, the post process to production tables will fail (the EMPLID value passed will not be used to create a new EMPLID). The same is also true for the User ID (USERID field). The process will not create a User ID using the value entered in the file.

See Also

PeopleSoft Campus Community Fundamentals 9.0 People Book, Using the File Parser Process

Defining Data Update Rules

Data update rules allow you to define the conditions when the constituent staging data should update the constituent data in production records. Prior to promoting the staged data to production, CTM evaluates the data update rules specified for the transaction that is being processed.

A data update rule defines whether or how transactions can update constituent staging data in the constituent production tables. It is not used for the transaction-specific data. Also, the data update rule functionality is applicable only for actions performed through CTM and not for the actions that an administrative user performs using the Campus Solutions pages or components.

The following data update rule values are delivered with your system:

Data Update Rule	Rule Name
ADD_IF_BLANK_RULE	Add If Blank Rule
DEFAULT_UPDATE_RULE	Default Update Rule
DO_NOT_UPDATE_RULE	Do Not Update Rule

Those are samples and can be modified to accommodate your needs. When creating a new rule, you can use one of the delivered rules as a basis to create your desired update rule(s) by clicking the *Copy* button. To use the new rule, associate it with a transaction code on Transaction Setup page.

Data update rules are set at the entity level, not at the staging record level. Only the entities where Apply Data Update Rule is selected can be defined as part of a Data Update Rule. Therefore, when adding a new data update rule, the Data Update Rule Entry page displays all those entities for which the Apply Data Update Rule check box is selected. This check box is available on the Entity Registry page (Set Up SACR, System Administration, Entity, Entity Registry). For those entities that you are not using as part of your transaction, set the Update Action to *Do Not Update* so you do not unintentionally blank or zero out data that may be populated by other business processes.

In the case of effective-dated entity data such as Biographical History: If data update rules allow the data in the Campus Solutions system to be updated but the incoming data is same as the data already in the system, then a new EFFDT row is *Not* created (no data update occurs). Suppose, you have set up a rule that gender can be updated by an online transaction. The system has the latest biographical history record, effective-dated April 26, 2009, with information such as Gender as Female and Marital Status as Single. The applicant on April 27, 2009 submits the same biographical history information such as Gender as Female and Marital Status as Single. In this case, because the information is the same, the system does not enter a new effective-dated row. The latest effective-dated row remains the same in the PeopleSoft system, which is April 26, 2009.

Warning! You must define the data update rules for any new entity that has been added through the Entity Registry page where the Apply Data Update Rule check box is selected. Additional coding is also necessary to incorporate a new entity into the data update rules.

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The following entity names are child entities of the Constituent entity. They are not applicable for data update rules due to their key structures.

Entity	Keys	Notes
Person Relationship (and its child records)	EMPLID, RELATIONSHIP_NBR and EFFDT	A new record row is always inserted. Exception: Relationship Type = *Spouse* • Only one spouse record row is allowed. • A new effective-dated row is inserted for the spouse relationship type. Creation of reciprocal relationships is not included as part of CTM.
Publications	EMPLID and PUBLICATION_NBR	A new record row is always inserted.
Work Experience	EMPLID and SEQUENCE_NBR	A new record row is always inserted.
Honors and Awards	EMPLID and DT_RECVD	A new record row is always inserted.

Note. Data Update Rule is not applicable for the New User Registration transaction (NEW_USER_REGISTRATION).

Warning! Data Update Rule is only applicable for updating constituent production records with the constituent staging data. It is not applicable to update the transaction production records.

Access the Data Update Rule Entry page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Data Update Rule Entry).

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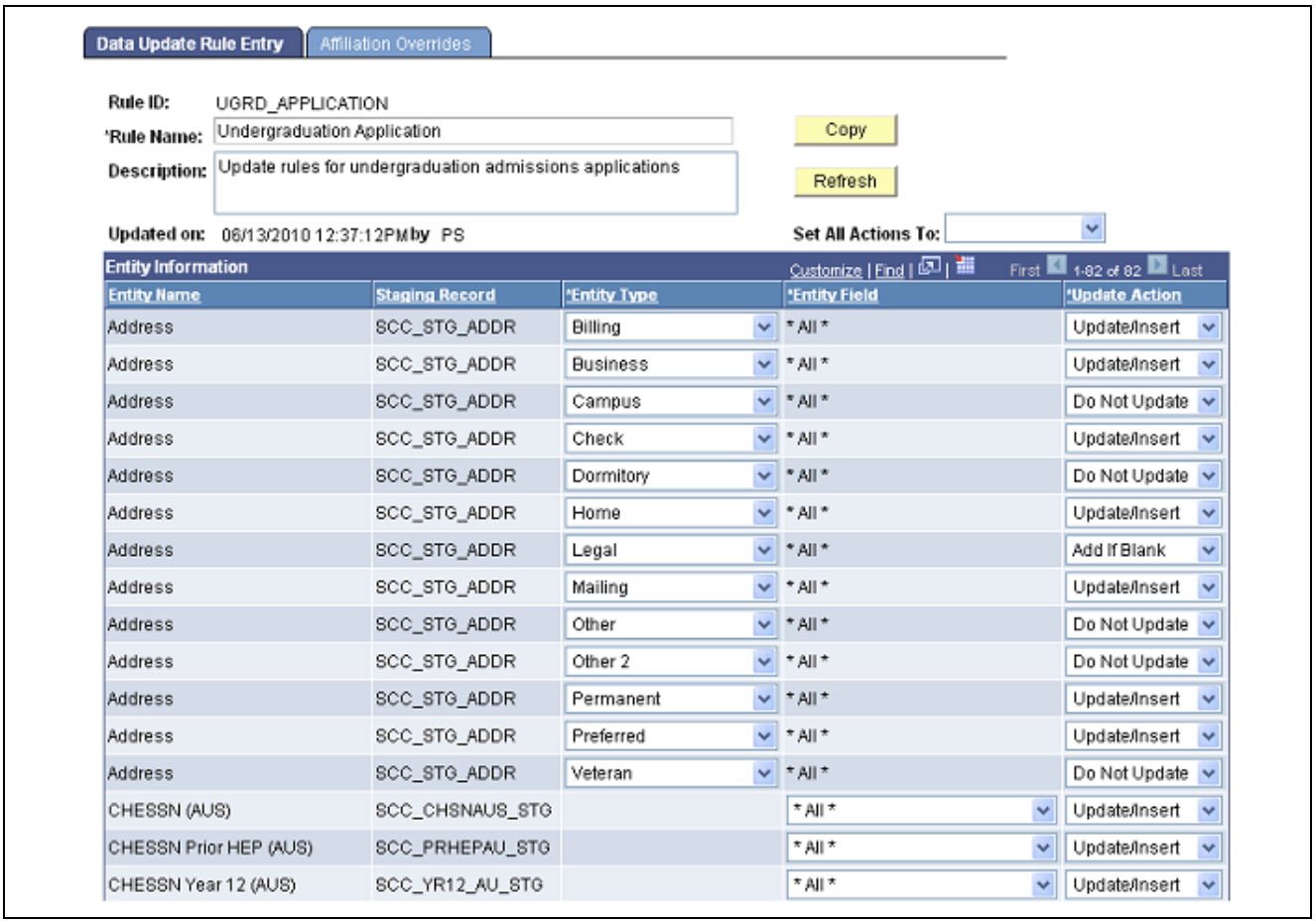

Data Update Rule Entry page (1 of 4)

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Citizenship	SCC_STG_CITZN		* All *	Safe Update
Citizenship History (AUS)	SCC_CITZHST_STG		* All *	Safe Update
Citizenship Passport	SCC_STG_CITZNPP		* All *	Do Not Update
Constituent	SCC_STG_CONSTIT		Date of Birth	Add If Blank
Constituent	SCC_STG_CONSTIT		Birth Location	Safe Update
Constituent	SCC_STG_CONSTIT		Birth Country	Safe Update
Constituent	SCC_STG_CONSTIT		Birth State	Safe Update
Constituent	SCC_STG_CONSTIT		Date of Death	Do Not Update
Disability	SCC_STG_DISBLTY		* All *	Safe Update
Diversity	SCC_STG_DIVRSTY		* All *	Safe Update
Drivers License	SCC_STG_DRV_LIC		* All *	Safe Update
Drivers License Type	SCC_STG_DRV_LTP		* All *	Safe Update
Education Subject (NLD)	SSR_SUB_NLD_STG		* All *	Safe Update
Email Address	SCC_STG_EMAIL	* All *	* All *	Update/Insert
Emergency Contact	SCC_STG_EMG_CNT		* All *	Safe Update
Emergency Phone	SCC_STG_EMG_PHN		* All *	Safe Update
Ethnic Diversity	SCC_STG_DIV_ETH		* All *	Update/Insert
Ethnicity Detail	SCC_STG_ETH_DTL		* All *	Update/Insert
External System	SCC_STG_EXT_SYS		* All *	Safe Update
External System Key	SCC_STG_EXT_SKY	* All *	* All *	Update/Insert
Extracurricular Activity	SCC_STG_EXTRACU		* All *	Safe Update
HESA Person (UK)	SCC_HE_PERS_STG		* All *	Safe Update
HESA Person Data (UK)	SCC_HE_PER_STG		* All *	Safe Update
Higher Ed Student Data (NLD)	SSR_STD_NLD_STG		* All *	Safe Update
Language	SCC_STG_LANG		* All *	Safe Update
Licenses and Certificates	SCC_STG_LICCERT		* All *	Safe Update
Memberships	SCC_STG_MBRSHP		* All *	Safe Update

Data Update Rule Entry page (2 of 4)

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Names	SCC_STG_NAMES	Degree	* All *	Do Not Update
Names	SCC_STG_NAMES	Father	* All *	Do Not Update
Names	SCC_STG_NAMES	Former1	* All *	Update/Insert
Names	SCC_STG_NAMES	Former2	* All *	Update/Insert
Names	SCC_STG_NAMES	Legal	* All *	Add If Blank
Names	SCC_STG_NAMES	Maiden	* All *	Update/Insert
Names	SCC_STG_NAMES	Mother	* All *	Do Not Update
Names	SCC_STG_NAMES	Other	* All *	Update/Insert
Names	SCC_STG_NAMES	Preferred	* All *	Update/Insert
Names	SCC_STG_NAMES	Primary	* All *	Do Not Update
National ID	SCC_STG_NID		* All *	Add If Blank
Person Data (CAN)	SCC_PDECAN_STG		* All *	Safe Update
Person Data (NZL)	SCC_PER_NZL_STG		* All *	Safe Update
Person Data (USA)	SCC_STG_PRSDATU		* All *	Update/Insert
Person Data Effdt	SCC_STG_PDE		Marital Status	Safe Update
Person Data Effdt	SCC_STG_PDE		Marital Status Date	Safe Update
Person Data Effdt	SCC_STG_PDE		Gender	Update/Insert
Person Data Effdt	SCC_STG_PDE		Highest Education Level	Safe Update
Person Data Effdt	SCC_STG_PDE		Full-Time Student	Safe Update
Person Data Effdt	SCC_STG_PDE		Language Code	Safe Update
Person Data Effdt	SCC_STG_PDE		Alternate Employee ID	Safe Update
Person Data Effdt	SCC_STG_PDE		Last Update Date/Time	Safe Update
Person Data Effdt	SCC_STG_PDE		by	Safe Update
Person SA	SCC_STG_PERSSA		* All *	Do Not Update
Phone	SCC_STG_PHONE	* All *	* All *	Update/Insert
Port of Entry Data	SCC_STG_SEVPOED		* All *	Safe Update
Religious Preference	SCC_STG_RELPREF		* All *	Update/Insert
Scholarship Data (NLD)	SSR_SCL_NLD_STG		* All *	Safe Update
Student Bank Account (NLD)	SSF_BNK_NLD_STG		* All *	Safe Update
Student Brincode (NLD)	SSR_SBR_NLD_STG		* All *	Safe Update

Data Update Rule Entry page (3 of 4)

Student Correspondence (NLD)	SSR_COR_NLD_STG		* All *	Safe Update
Student Data (AUS)	SSR_STD_DAT_STG		* All *	Safe Update
Student Information (NLD)	SSR_INF_NLD_STG		* All *	Safe Update
Student Names (NLD)	SSR_NME_NLD_STG		* All *	Safe Update
Student Nationalities (NLD)	SSR_NAT_NLD_STG		* All *	Safe Update
Student Prior Education (NLD)	SSR_EDU_NLD_STG		* All *	Safe Update
Student Report (CAN)	SSR_STG_CNRP_ST		* All *	Safe Update
Tribal Affiliation (NZL)	SCC_IWI_TBL_STG		* All *	Safe Update
Visa Permit Data	SCC_STG_VISPMTD		* All *	Do Not Update

Data Update Rule Entry page (4 of 4)

Copy Click to access the Copy Data Update Rule page and copy an existing rule's settings to the new rule.

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Refresh

Click to refresh the entities populated on the Data Update Rule Entry page. When you click the button, a message appears indicating which entities have been added or removed from the page.

For example, suppose you added a new entity and selected the Apply Data Update Rule check box on the Entity Registry page. In such a case, you must click the Refresh button to populate the Data Update Rule Entry page with this new entity. Conversely, you cleared the Apply Data Update Rule check box on the Entity Registry page for an entity. In such a case, you must click the Refresh button to remove the entity from the Data Update Rule Entry page.

Set All Actions To

Select an update action that you want to apply for all the entities. The update actions you can select are *Add If Blank, Do Not Update, Safe Update* (applicable for only non-type entities) and *Update/Insert.*

Entity Name

Displays the name of the entity as defined on the Entity Registry page.

Staging Record

Displays the staging record where the system stores the incoming entity data from a transaction. You define a staging record for an entity on the Entity Registry page.

Entity Type

This field is only available for entities with multiple types, such as Address (Address Types) and Name (Name Types) entities. The default value is *All.* Select *Show All Types* to display all the types for an entity. Select this value if you want to specify a different update action for one or more types of an entity. For example, suppose you want to enter *Update/Insert* update action for campus address and *Add If Blank* update action for all the other address types (such as home or billing). In such a case, select *Show All Types* for the Address entity and specify the update action for each address type.

Select *All* if you do not want to display all the types for an entity. Select this value if you want to specify the same update action for all the types of an entity. For example, select *All* if you want to enter *Update/Insert* update action for all the address types (such as campus, home and billing).

Warning! Do not confuse the meaning of entity type described here with the Entity Type defined in the Entity Registry component. In the context of Data Update Rule, entity type refers to the types included inside certain data fields. For example Names has different types, so do Addresses, Phone, and Email Address.

Entity Field

This field is only available for entities that do not have any types, such as Constituent and Diversity entities.

Select *Show All Fields* to display all the non-key fields of an entity. Select this value if you want to specify a different update action rule for one or more fields of an entity. For example, suppose you want to enter *Do Not Update* as the update action for Date of Birth field and enter *Add If Blank* update action for rest of the Constituent fields (such as Birth Location or Birth Country). In such a case, select *Show All Fields* for the Constituent entity and specify the update action for each Constituent field.

When you select *Show All Fields*, Entity Field displays the long description for each of the non-key fields contained in the production record listed for the Entity Name in the Entity Registry component.

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Note. The *Show All Fields* option does not display the key fields because key fields cannot be overridden or updated.

For information about defining an entity name (entity):

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Setting Up Entity Registry"

Update Action

Identify what the system should do when it posts the entity data to the production records of an existing constituent:

Select *Add If Blank* to add the entity data only if the constituent does not have the entity data. For example, suppose you have assigned *Add If Blank* to the Home Email Address entity type for the graduate application transaction. The email address staging record contains a Home email address for a particular Temporary ID. In the case where that constituent does not have a home email address on the email address production record of the database, the system adds the constituent's home email address to the database. If the constituent already had a Home email address, the staged value will not update the production record since it is not blank (a value already exists).

Note. For the Update Action *Add if Blank*, an existing Gender of *Unknown* is considered to be blank and will be updated. As well, if the National ID is populated with the Country Default (XXX-XX-XXXX for example), it is considered to be blank and will be updated.

Select *Do Not Update* to prevent the constituent's entity data from being updated. For example, suppose you have assigned *Do Not Update* to the National ID entity for the graduate application transaction. The National ID staging record contains a National ID for a particular Temporary ID. In the case where that constituent already has a National ID on the National ID production record of the database, the system does not update the applicant's existing National ID.

Note. *Do Not Update* is the default value for all the entity names.

Note. Keep in mind the relationship of a field to another field when defining your update actions for individual fields in an entity. For example, do not set State/Province to *Update/Insert* if you have Country set to *Do Not Update.* If the system already has a Country value of *Canada* and a Province value of *Alberta*, but the incoming data has a Country value of *Australia* and a Province value of *Tasmania*, you will get an error when posting the data as *Tasmania* is not a valid Province for *Canada.*

Warning! Note that if the *Do Not Update* action is selected for an entity or an entity field, the data will not be posted even if data does not exist on the production record.

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Select *Safe Update* to update or insert the constituent's entity data only if the incoming data is populated. This action is available only for entities without a type. If the entity data has an effective date, then the system inserts new effective-dated rows but does not overwrite existing fields with blank or zero. If the entity data does not have an effective date, then the system updates the existing record only for the fields where incoming data is populated. For example, suppose you have assigned *Safe Update* to the Constituent entity for the graduate application transaction. The system receives a graduate application with only Date of Birth and Birth Country populated for the Constituent entity. Birth State and Birth Location are not populated as part of the incoming data. The applicant already has Date of Birth, Birth Country, Birth State and Birth Location on the production record of the database. In such a case, the system updates Date of Birth and Birth Country with the incoming data but will not update Birth State and Birth Location as these fields are not populated as part of the incoming data.

For *Safe Update* specifically, handling of *blanks* or zero values in incoming data is as follows:

- For *TYPED* data, being entities with a built in Type (such as Names and Addresses), the blanking out of fields during update is allowed as these entities are atomic in nature and must be updated as a single unit. For this reason, *Safe Update* is not shown as an option for entities with a Type.
- For *EFFDT* and *non-EFFDT* entities (which are not typed), we will not blank out or set an existing field to blank or zero if *Safe Update* is selected as the update action. For example, on your transaction, you require Birth Date and Birth Country to be completed but you do not have Birth Location or Birth State/Province on your transaction. The existing record has values populated for Birth Location and Birth State/Province. By selecting *Safe Update*, the values for Birth Location and Birth State/Province will not be updated to blank when the transaction data is posted.

Select *Update/Insert* to update or insert the constituent's entity data, even if the incoming and existing values are the same. If the entity data has an effective date, then the system inserts a new effective-dated row if the incoming data differs from the current effective-dated row. If the entity data does not have an effective date, then the system updates the existing record.

For *Update/Insert* specifically, handling of *blanks* or zero values in incoming data is as follows:

- For *TYPED* data, being entities with a built in Type (such as Names and Addresses), the blanking out of fields during update is allowed as these entities are atomic in nature and must be updated as a single unit.
- For *EFFDT* and *non-EFFDT* entities (which are not typed), we allow the blanking or zero set of entity fields for the *Update/Insert Data* Update Action. For this reason, care should be taken for each entity or field when selecting this option. There may be circumstances where it is appropriate that incoming data blank out or set a field to zero and other cases where this is not appropriate.

Warning! Note that the *Update/Insert* action will update character-based fields to blank or null and numeric fields to zero if the field is not populated on the incoming entity. For example, suppose you have assigned *Update/Insert* to the Constituent entity for the graduate application transaction. The system receives a graduate application with only Date of Birth and Birth Country populated for the Constituent entity. Birth State and Birth Location are not populated as part of the incoming data. The applicant already has Date of Birth, Birth Country, Birth State and Birth Location on the production record of the database. In such a case, the system updates the applicant's existing Date of Birth and Birth Country with the incoming data but will also update Birth State and Birth Location to blank. For this reason, use caution when selecting the *Update/Insert* action to prevent existing data from being updated to blank or zero. In the example above, if you do not want the Birth State and Birth Location to become blank, you should select the Update Action of *Safe Update*.

Refer to the next section "Setting Up Affiliation Overrides for a Data Update Rule" for information on how you can have the system update constituent data based on the affiliation the institution has with the constituent.

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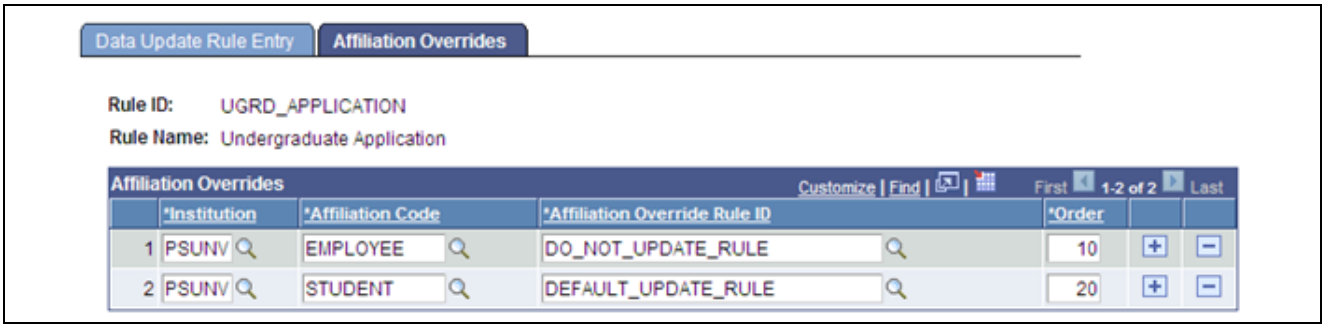
See Also

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, “Setting Up Entity Registry"

Setting Up Affiliation Overrides for a Data Update Rule

Access the Affiliation Overrides page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Data Update Rule Entry, Affiliation Overrides).



Affiliation Overrides page

Warning! To use Affiliation Overrides, Transaction Setup must be set to Partition by Transaction, Institution must be a field for the Staged Record Name entered in the Transaction Status and Date section of Transaction Setup, and the Affiliation Overrides page must be set up.

Rule Name

Displays the name of the rule given in the Data Update Rule Entry tab.

Institution and Affiliation Code

Enter the academic institution and affiliation for which you want to override the rule defined on the Data Update Rule Entry page.

For example, suppose for a rule name *UGRD_APPLICATION* you have defined an *Update/Insert* update action for the Home Address entity type. For the same rule, *UGRD_APPLICATION*, you can specify that if the system receives a CTM transaction set with this rule name and the constituent has an affiliation of Employee for the PSUNV institution, apply a different rule that has an update action of *Do Not Update* for the Home Address entity type.

Affiliation Override Rule ID

Enter the overriding rule for the academic institution and affiliation combination.

Order

Indicate the order in which you want the system to check the override rule. The system applies the Affiliation Override Rule ID for the affiliation assigned to the constituent using the following criteria:

- The highest order where the affiliation status is *Active*.
- The affiliation start date is less than or equal to the date when the transaction is submitted.
- The affiliation end date is either blank or greater than or equal to the date when the transaction is submitted.

For example, if you have defined an override rule for PSUNV and *Employee* with order number 10 and another rule for PSUNV and *Student* with order number 20, the system evaluates the Employee rule before the Student rule. If the constituent has active affiliations for both Employee and Student, the system applies the override rule for Employee. If the constituent has an active

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affiliation for only Student, the system applies the override rule for Student. If the constituent does not have an affiliation for either Employee or Student, the system applies the base update rule.

Processing Staged CTM Transactions

CTM is a framework that manages staged data for a transaction and how this data gets validated and moved to the proper production tables. The staged data must be reviewed in two separate components:

- The Constituent Staging component (delivered with your system).
- The transaction staging component (delivered with your system for fully implemented transaction, for instance, the Application Transactions staging component delivered with AAWS, or created by you if you create your own CTM consumer).

Use the Constituent Staging component to review or edit the constituent data stored in the constituent staging tables. The component includes a link that enables you to access the transaction staging component. The transaction staging component shows the data from the staging records used for the transaction. You either create this component (if you created a CTM consumer that has not been delivered with the system) or you use the transaction components delivered with the system. For example, with AAWS we delivered the Application Transactions component (SAD_APPL_STG) to allow viewing and editing the application transaction staged data prior to posting it to the appropriate production tables.

See “Developer Reference for Creating a New CTM Consumer,” Step 5: Creating a Transaction Staging Component – Optional section of this chapter.

The staging tables are holding tables and are separate from the core production records. Any data changes you make in the staging components gets posted to the core production records when the posting process is executed (real time, manually, or by batch) depending on data update rules. You can use these components to review the information stored in the staging tables at any time. For example, you might prefer to look at the transaction data immediately after the system loads it into the staging tables or after posting. This data is no longer editable once all transactions related to the constituent record have a transaction status of *Posted* or *Cancelled*.

This section discusses:

- Reviewing constituent information.
- Reviewing constituent error messages.
- Constituent statuses.
- Transaction statuses.
- Reviewing constituent details.
- Reviewing constituent participation details.
- Reviewing constituent’s additional personal information.
- Reviewing constituent’s regional information.
- Running the Transaction Management process.

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Note. The search record for the Constituent Staging component is not restrictive. If your administrators have access to the component, they will see all of the transactions performed. If you want to restrict the information a user can see, you can create your own search record and add the Constituent Staging component to a menu name specific to the transactions. For example, for AAWS admission transactions, we delivered the Constituent Staging component inside an admissions menu name and the search record has been cloned to include application center security.

Pages Used to Process Staged CTM Transactions

Page Name	Definition Name	Navigation	Usage
Summary Information	SCC_STG_CONST_STG	• Campus Community, Constituent Transaction Mgmt, Constituent Staging, Summary Information • Student Admissions, Application Transaction Mgmt, Constituent Staging, Summary Information	Review the constituent status for a specific Temporary ID, the constituent error messages, and the transactions performed for or by the user. Run the search/match/post process or post the transaction data. Manually trigger Search/Match to review the list of potentially matching candidates.
Constituent Details	SCC_STG_CONST_DTLS	• Campus Community, Constituent Transaction Mgmt, Constituent Staging, Constituent Details • Student Admissions, Application Transaction Mgmt, Constituent Staging, Constituent Details	Review and edit the personal information loaded in the constituent staging records for a specific Temporary ID. Personal information includes data such as names, date of birth, national ID, and address.
Participation Details	SCC_STG_PARTICIP	• Campus Community, Constituent Transaction Mgmt, Constituent Staging, Participation Details • Student Admissions, Application Transaction Mgmt, Constituent Staging, Participation Details	Review and edit the participation details loaded in the constituent staging records for a specific Temporary ID. Participation details may include information such as work experience and honors and awards.

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Page Name	Definition Name	Navigation	Usage
Additional Personal Info	SCC_STG_ADDITION	• Campus Community, Constituent Transaction Mgmt, Constituent Staging, Additional Personal Info • Student Admissions, Application Transaction Mgmt, Constituent Staging, Additional Personal Info	Review and edit the additional personal information loaded in the constituent staging records for a specific Temporary ID. Additional personal information may include citizenship details and emergency contacts.
Regional	SCC_STG_REGIONAL	• Campus Community, Constituent Transaction Mgmt, Constituent Staging, Regional • Student Admissions, Application Transaction Mgmt, Constituent Staging, Regional	Review and edit the regional information loaded in the constituent staging records for a specific Temporary ID.
Selection Parameters	SCC_SL_SMP	• Campus Community, Constituent Transaction Mgmt, Transaction Management Process, Selection Parameters • Student Admissions, Application Transaction Mgmt, Transaction Management Process, Selection Parameters	Enter selection parameters for running the Transaction Management process. You can run search, match, and post for saved and submitted transactions in the staging records. Also, you can process a transaction for a single person, all persons, or use Population Selection to select a subset of Temporary IDs in the staging records. Before you post the data, set up the Search/Match parameters on the Search/Match Parameters page.
Search/Match Parameters	SCC_SL_SMP_PARM	• Campus Community, Constituent Transaction Mgmt, Transaction Management Process, Search/Match Parameters • Student Admissions, Application Transaction Mgmt, Transaction Management Process, Search/Match Parameters	Set up the Search/Match parameters for the Transaction Management process. These are the rules that determine what the post process should do with the staging record after the Search/Match process is complete. The page defaults the Search/Match parameters entered in the Transaction Setup component for the Transaction Code selected.

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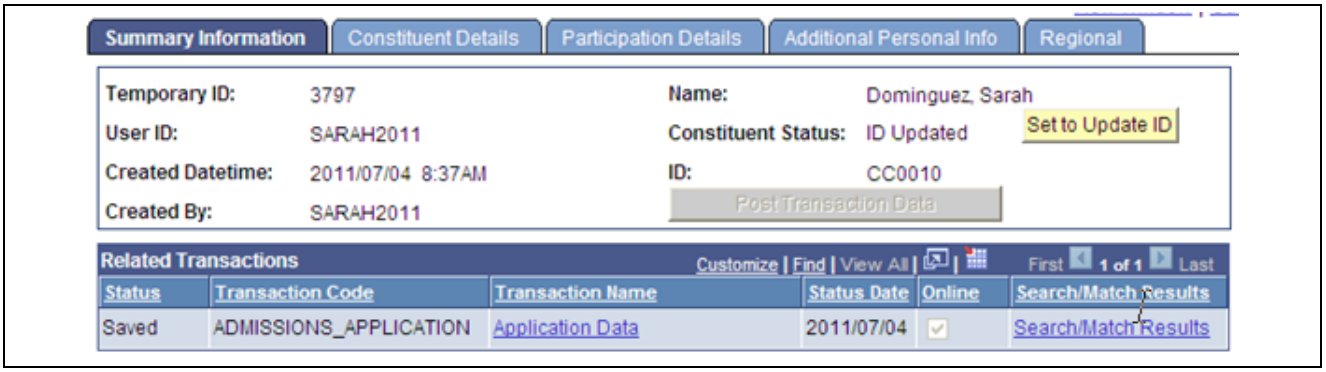
Reviewing Constituent Information

Access the Summary Information page (Campus Community, Constituent Transaction Mgmt, Constituent Staging, Summary Information).



Summary Information page

Temporary ID

Displays the auto-generated number.

The system assigns this number depending on whether you partitioned the transaction either by constituent or by transaction on the Transaction Setup page. If you have selected the partition *by constituent* option, a single Temporary ID is associated to all the transactions of the individual. If you have selected the partition *by transaction* option, the system assigns a new Temporary ID to each transaction of the individual.

Note. Temporary ID is also known as Constituent Temporary ID. It is the main key to the constituent and the transaction staging tables.

Note. The auto-generated number is initially set up in the Counter Setup component. See the "Setting Up CTM", Setting Up Counter section in this chapter.

Note. The Temporary ID field is only used by CTM transactions whether it is in the staging records defined for CTM transactions or in the CTM logic. Its value is not reused anywhere else. For instance, the post process does not use this value to create an EMPLID. EMPLID is auto-generated and uses the Last Employee ID Assigned value.

Constituent Status

Indicates the status of the constituent data in the staging table. This status controls when a transaction can be posted. Refer to the "Processing Staged CTM Transactions," Constituent Statuses section for more information.

Note. Do not modify the delivered values in any way. Any modifications to these values require a substantial programming effort.

ID

Indicates the ID that will be used to post a transaction. ID value is determined either by the User ID that performs the transaction (in the case of returning users, the system retrieves the EMPLID value assigned to the user profile),

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the Search/Match process, or manually by an administrator if the search for duplicates was performed individually.

Note that a returning user is a user that already has a User ID.

Run Search/Match/Post

Click to run Search/Match and if an ID is identified, post the constituent data to the appropriate production records. The transaction data also gets posted for the transaction listed in the Related Transactions grid that are set with a Transaction Status of *Submitted* (indicates the transaction is ready to be posted).

If Search/Match has already been run, an ID is identified and the transaction status is *Submitted,* the system displays the Post Transaction Data button instead of the Run Search/Match/Post button. Clicking the Post Transaction Data button posts the transactions listed in the Related Transactions grid that are set with a Transaction Status of *Submitted.*

If all the transactions in the Related Transactions have a status of *Posted,* the system disables the Post Transaction Data button.

Related Transactions

Status

Indicates the status of the related transactions performed for or by the Temporary ID. This status, along with the Constituent Status, controls when a transaction can be posted. Refer to the "Processing Staged CTM Transactions," Transaction Statuses section for details.

Note. Do not modify the delivered values in any way. Any modifications to these values require a substantial programming effort.

<Transaction Name>

Click to access the transaction staging component created for the transaction you clicked the link for. You can access the component only if you have security access to it. The system disables the link if the user does not have access to the target page.

Note. The link name, by default, matches the name given to the transaction on the Transaction Setup component. In the preceding exhibit example — Summary Information page — you can see that the link is Application Data because for the ADMISSIONS_APPLICATION transaction the Transaction Name is set to *Application Data* on the Transaction Setup component.

Online (Online Transaction)

Indicates whether this transaction was performed online or offline. For example, if the transaction is generated because a self-service user saved or submitted a transaction, the system selects this check box. If the transaction is generated because you have loaded staged data for multiple constituents using the File Parser utility (that is, offline transaction), the system does not select this check box.

Note. A transaction is set up to be performed online or offline in the Transaction Setup page.

Search/Match Results

Click to run Search/Match and manually review the matching candidates. Using this link, you do not need to enter any search data. Instead, the Search Parameter value defined in the Transaction Setup component for the

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transaction for which you clicked the link is used to identify the search fields and the data for these fields is retrieved directly from the staging records. The search results are displayed using the Search Results Code defined for that same transaction in the Transaction Setup component.

If matches are found, the system displays the Integrated Search Results page. Else, a message saying that no result was found is shown.

Note. The system does not display the Search/Match Results link for a New User Registration transaction.

Note. The Search/Match function validates if External Search/Match is enabled or disabled. If enabled, the Search/Match function triggers External Search/Match. See “External Search/Match and CTM’ section in this chapter for more information.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up Search/Match”

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up External Search/Match”

Set To Update ID

Click this button if inadvertently you or the system has created or updated the constituent data to a wrong ID and you want to repost the data with the correct ID. The button appears only when Constituent Status = *New ID Created* or *ID Updated* and none of the transactions listed in the Related Transactions grid have a status = Posted (other than the New User Registration transaction called NEW_USER_REGISTRATION).

Note. If a transaction was posted with the wrong ID (transaction status = *Posted*), you need to first unpost the transaction, delete the created transaction and then you will be able to see the Set to Update ID button and change the ID. You unpost a transaction from the transaction staging component.

Constituent Errors

The Summary Information page displays the Constituent Errors section if the constituent status is *Error.*

Reviewing Constituent Error Messages

Access the Summary Information page (Campus Community, Constituent Transaction Mgmt, Constituent Staging, Summary Information).

When constituent data is loaded into the staging records, validation is in place to make sure valid data is entered. Errors can occur when a user saves or submits an online transaction, when an administrator enters data directly inside the Constituent Staging component, or when the data is loaded through batch (for example, using File Parser). When data is entered into the staging records, the system creates a transaction. A transaction might have an error status for the constituent (person) or the transaction-specific data record. For error indicators, look through both the components to find the erroneous field values and manually correct it. When an error is detected, components display an error grid with the proper error message.

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For example, suppose an administrative user updates a Temporary ID's information with an invalid email address and an invalid National ID value. At component save time, data validation is performed. If an error is found, the Constituent Status is set to *Error* and the Constituent Staging component displays the appropriate error messages inside the Constituent Errors grid in the Summary Information page.

Note. The Constituent Staging component only validates and displays the errors related to the constituent data. The errors related to the transaction-specific data are displayed on their respective staging component. For an example of that, see *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Managing PeopleSoft Admission Transactions", Understanding Staged Admission Transactions Processing

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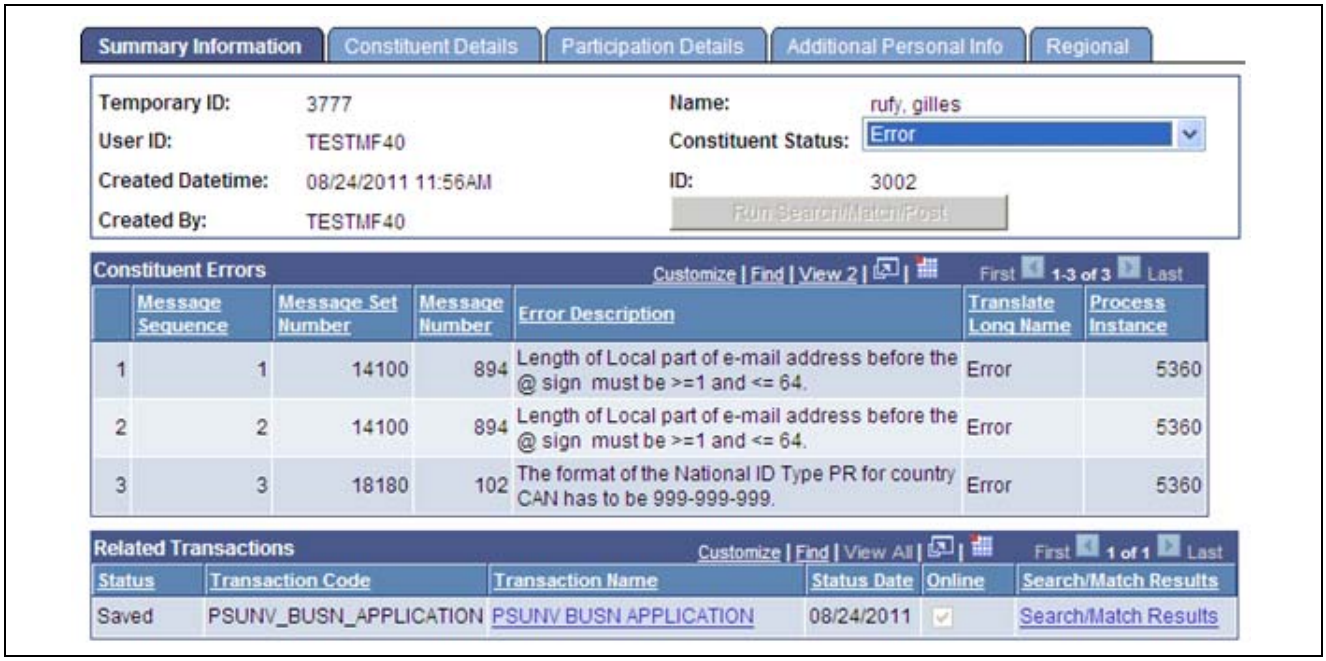
Here is an example of constituent errors that the Constituent Staging component displays:



Example of constituent errors displayed in the Constituent Staging component

The Temporary IDs that are assigned a Constituent Status of *Error* need to be manually reconciled. You correct the errors directly in the component and save. If the validation process does not find further errors, the system changes the Constituent Status to *Loaded*, ready to go through the posting process. You can run the posting process manually by clicking the Run Search/Match/Post button (enabled when data is eligible for posting), or by running the Transaction Management process.

Note. To easily retrieve the Temporary IDs that need manual reconciliation, use the component search record and select Constituent Status of *Error.* The search record returns all the Temporary IDs with that status.

The following example shows the Temporary IDs with *error* status after a search:

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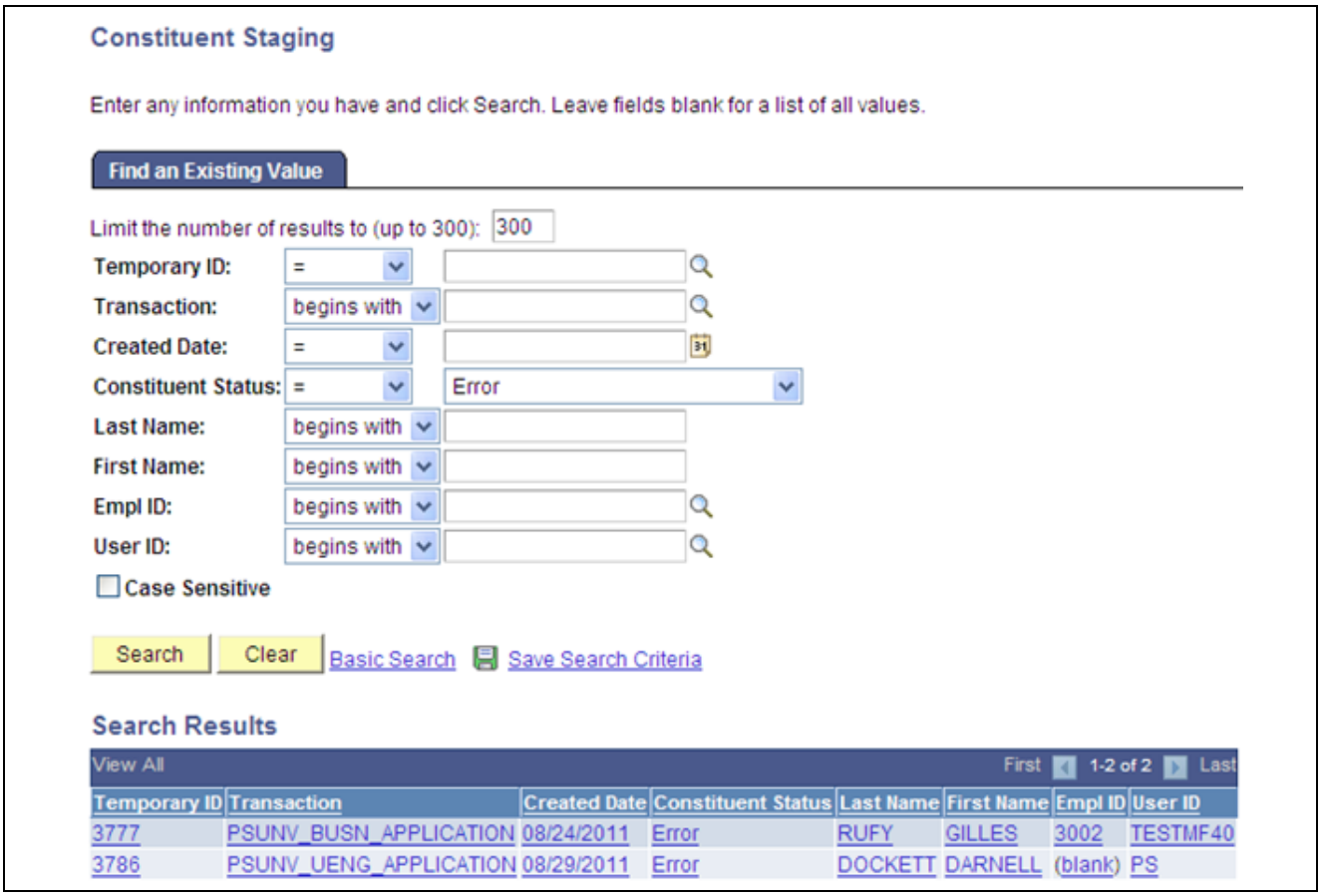

Example of how to search for the Temporary IDs that have a Constituent Status of Error

Constituent Statuses

The following table describes the various constituent statuses:

Constituent Status	Description	How Status is Set
Loaded	This status indicates that the system has loaded the data into the staging records and has not run Search/Match.	Set by the system if Search/Match has not run or after an administrator corrects an error.

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Constituent Status	Description	How Status is Set
New ID Created	This status indicates that the system has run Search/Match and has created a new Employee ID for the staging record. The system assigns this status to a record when it adds a new Employee ID. It adds a new Employee ID when the Search/Match settings for the transaction determine that the record is new. The system also assigns this status to a record when you manually set the constituent status to *Add New ID* and then click the Run Search/Match/Post button or run the Transaction Management process. The system can assign this status at any time during the process depending on how the transactions are set up. If you have selected the real time option on the Transaction Setup page, the status assigns this status when the user saves or submits their transaction.	Set by the system.
ID Updated	This status indicates that the system has run Search/Match and has found an existing Employee ID for the staging record or the transaction has been processed for a returning user where the Employee ID is known for the user. The system assigns this status to a record when it updates constituent data for an existing Employee ID. It updates an existing Employee ID when the Search/Match settings for the transaction determine that a matching record exists or if a returning user saves or submits a subsequent transaction. This can be done at any time during the process depending on how the transactions are set up. If the process is real time, it will be done at the point the user either saves or submits their transaction.	Set by the system.

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Constituent Status	Description	How Status is Set
Suspended	This status indicates that the system has run Search/Match and has suspended the staging record for your review. The system suspends a record from further processing because possible matches have been found based on the Search/Match settings for the transaction. If previously you had changed the status from *Suspended* to any other status, you can manually change the status back to *Suspended* (depending on whether the constituent data has been posted to the production record).	Set by the system. Set manually.
Ignore	This status indicates that the system has run Search/Match and the Search/Match parameters setup suggests you to ignore the staging record. Processing of the record will not continue while this status is set. You can also manually assign this status if you want the system to ignore the staging record for further processing.	Set by the system. Set manually.
Error	This status indicates that the system has encountered a problem when processing the record. The system can assign this status to a staging record when it encounters a problem during data validation, when running Search/Match, or when the data is being posted. The system displays the error message on the Summary Information page. You must resolve the error and save the record. The system does not allow you to manually change from *Error* status to another status. When you resolve an error and save the record, the status automatically changes to *Loaded*, which indicates that you need to start the processing again by running the post process again (whether it is done by clicking the Run Search/Match/Post button or the Post Transaction Data button or by running the Transaction Management process). Notice that if an ID was already identified, the post process will use it to revalidate and to post the data.	Set by the system.

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Constituent Status	Description	How Status is Set
Add New ID	This status indicates that you have determined that the constituent should be added as a new person. You can assign this status when you have determined that the staging record should be added with a new Employee ID.	Set manually.
Update ID	This status indicates that you have determined that an existing constituent record should be updated with the staging data. You can use the Search/Match results or the ID field to choose the Employee ID whose record you want to update. After assigning this status and choosing an Employee ID, you can click the Run Search/Match/Post button or run the Transaction Management process to update the existing record.	Set manually.
Cancelled	This status indicates that you have determined the transaction is incomplete, duplicate or should not be processed further. You cannot delete a transaction but you can cancel a constituent transaction. No further data updates by the user or the administrative user can be performed on a cancelled row. The Transaction Management process ignores the cancelled rows. **Note.** Cancelling a constituent implies that none of the transactions tied to it can be updated or processed further. Also if your user interface for the online transaction is configured appropriately, this status can be used when an end user has manually cancelled the transaction (for instance, closed the browser window) before saving or submitting an online transaction.	Set by the system. Set manually.

Transaction Statuses

The following table describes the various transaction statuses:

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Transaction Status	Description
Saved	This status indicates that the system has saved the transaction to the staging records and the transaction is not ready to be processed. There are three ways to set a transaction status to *Saved:* 1. Automatically by the system when an online transaction is saved (the user interface calls a *Save* service operation). See "Developer Reference for Creating a New CTM Consumer," Step 4: Creating or Maintaining Web Services section in this chapter for more details about the Save service operation. 2. Manually by an administrative user from the transaction staging component if for any reasons the transactions is not ready for processing. 3. When setting up the File Mapping Definition, you can define the default value that File Parser should assign as the Transaction Status. For more information about how to set up File Parser: See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, “Using File Parser for Loading Applications"
Submitted	This status indicates that system has submitted the transaction to the staging records and the transaction is ready to be processed. There are three ways to set a transaction status to *Submitted:* 1. Automatically by the system when an online transaction is submitted (the user interface calls a *Submit* service operation). See "Developer Reference for Creating a New CTM Consumer," Step 4: Creating or maintaining Web Services section in this chapter for more details about the Submit service operation. 2. Manually by an administrative user from the transaction staging component to indicate the transaction is ready to be processed. You cannot post *Saved* transactions; only transactions with *Submitted* status can be posted. For more information about how to set up File Parser: See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, “Using File Parser for Loading Applications".

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Transaction Status	Description
Saved Error	This status indicates that the system encountered problems when saving a transaction. You must resolve these errors before the transaction can be posted. You cannot manually change this status. When you resolve the error and save the staging record (from the appropriate transaction staging component), the system automatically sets the status back to *Saved.*
Submit Error	This status indicates that the system encountered problems when submitting a transaction. You must resolve these errors before the transaction can be posted. You cannot manually change this status. When you resolve the error and save the staging record (from the appropriate transaction staging component), 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, as part of AAWS, 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. **Note.** Your transaction needs to include code to determine the conditions where this status should be assigned.
Posted	This status indicates that the system has successfully posted the transaction. The staged data got inserted inside the appropriate production records. 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.

Reviewing Constituent Details

Access the Constituent Details page (Campus Community, Constituent Transaction Mgmt, Constituent Staging, Constituent Details).

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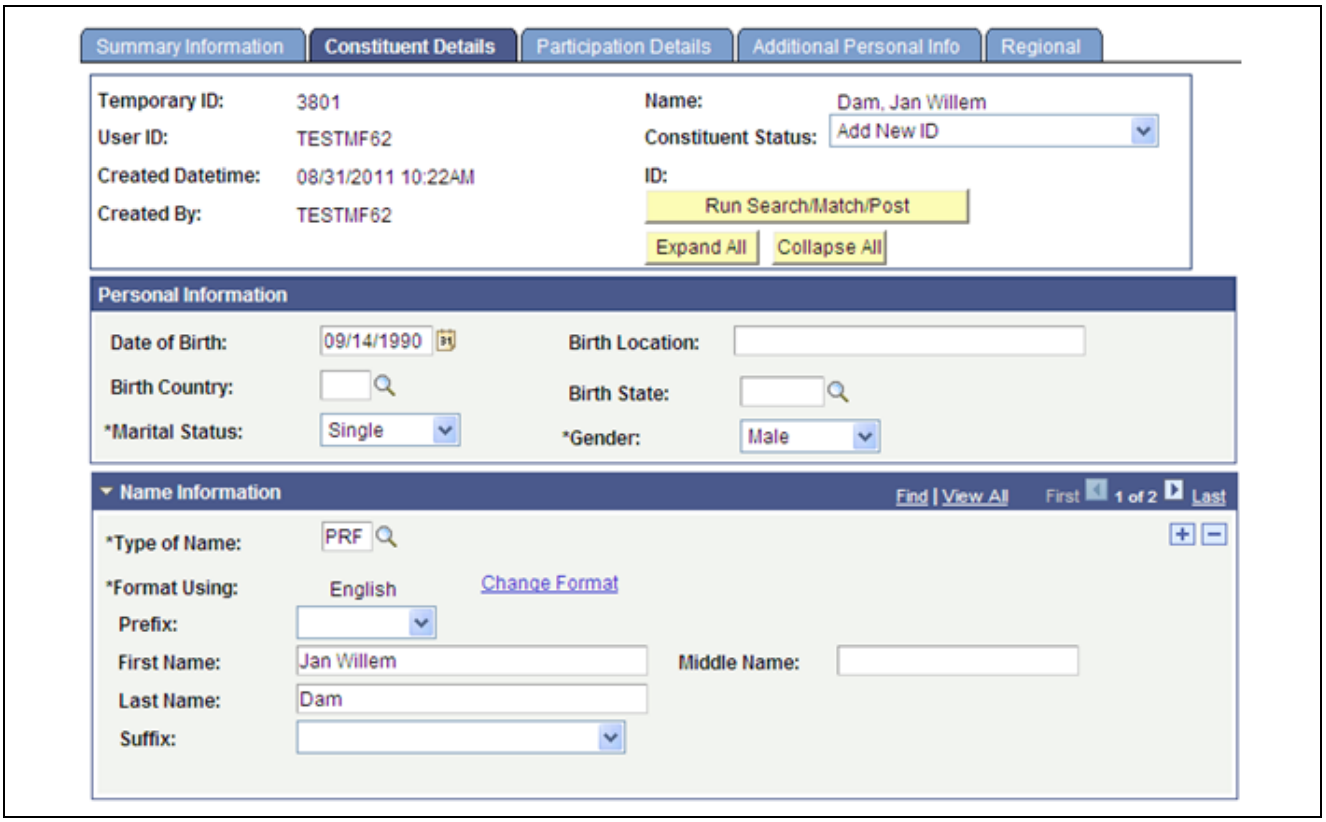
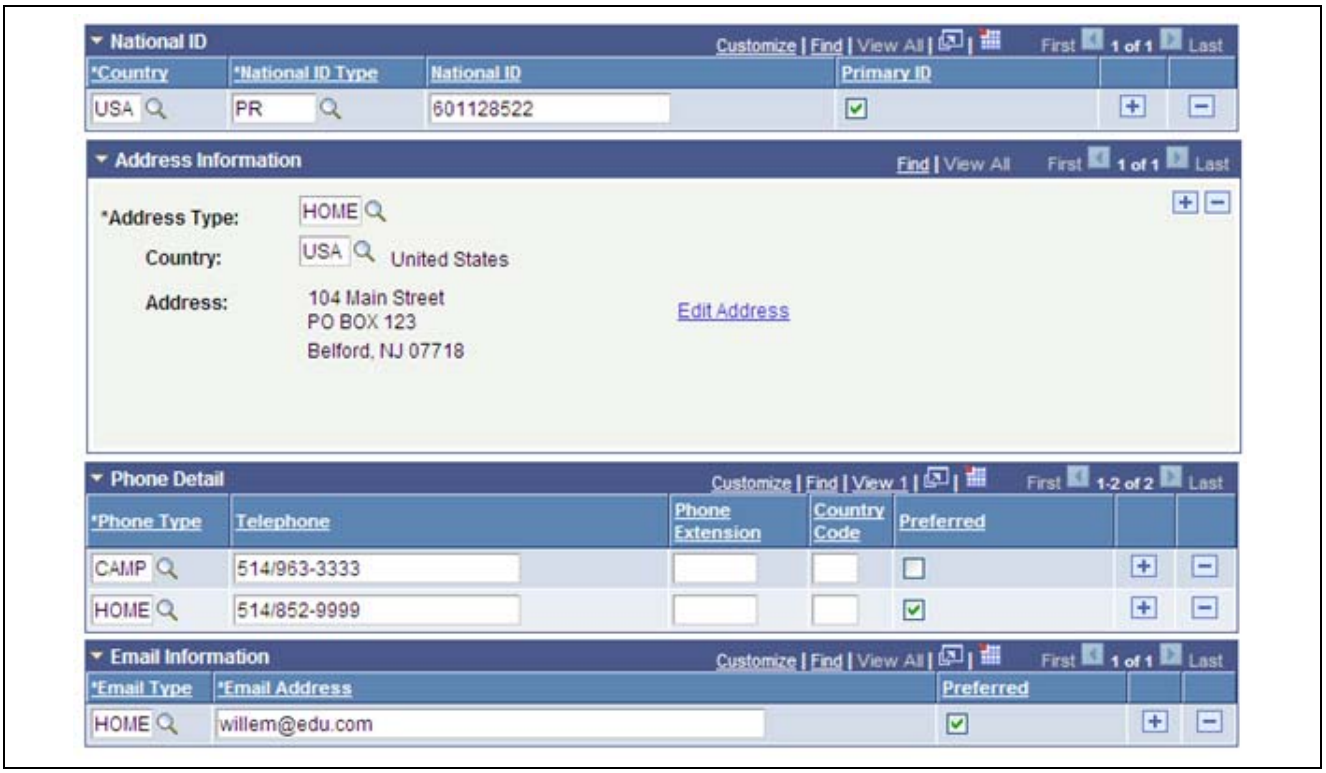


Constituent Details page (1 of 2)



Constituent Details page (2 of 2)

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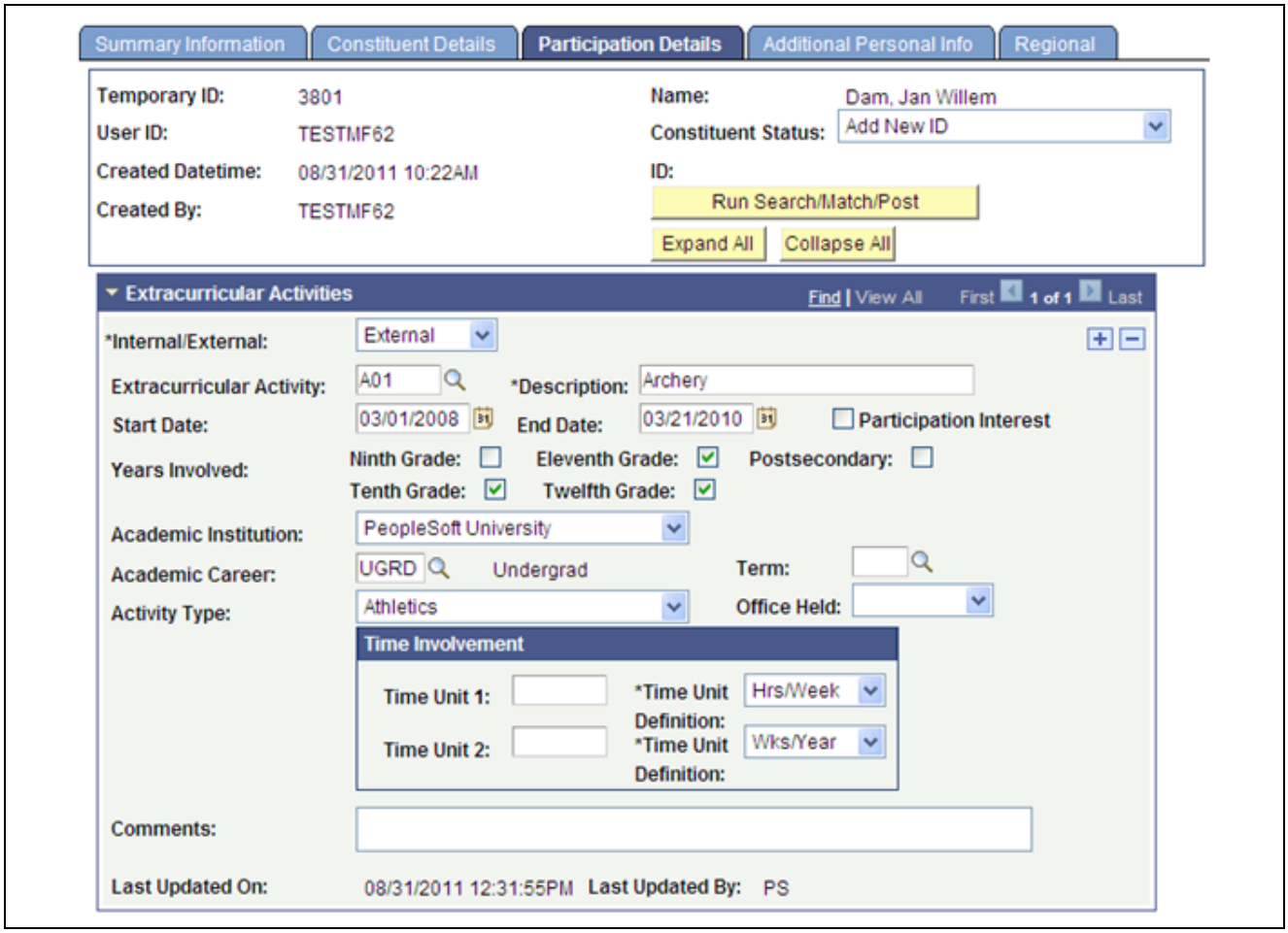
Reviewing Constituent Participation Details

Access the Participation Details page (Campus Community, Constituent Transaction Mgmt, Constituent Staging, Participation Details).



Participation Details page (1 of 5)

Participation Details page (2 of 5)

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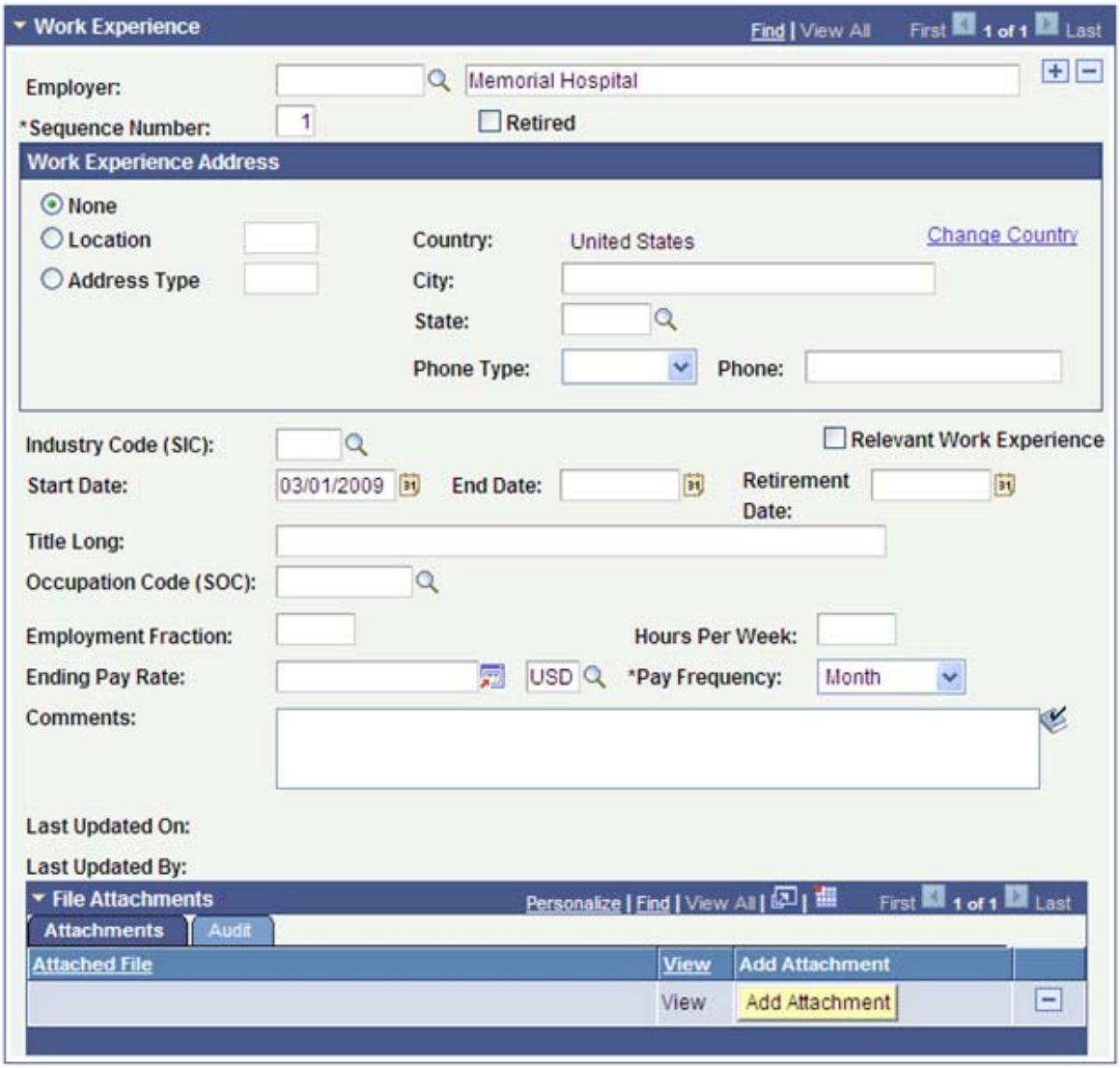

Participation Details page (3 of 5)

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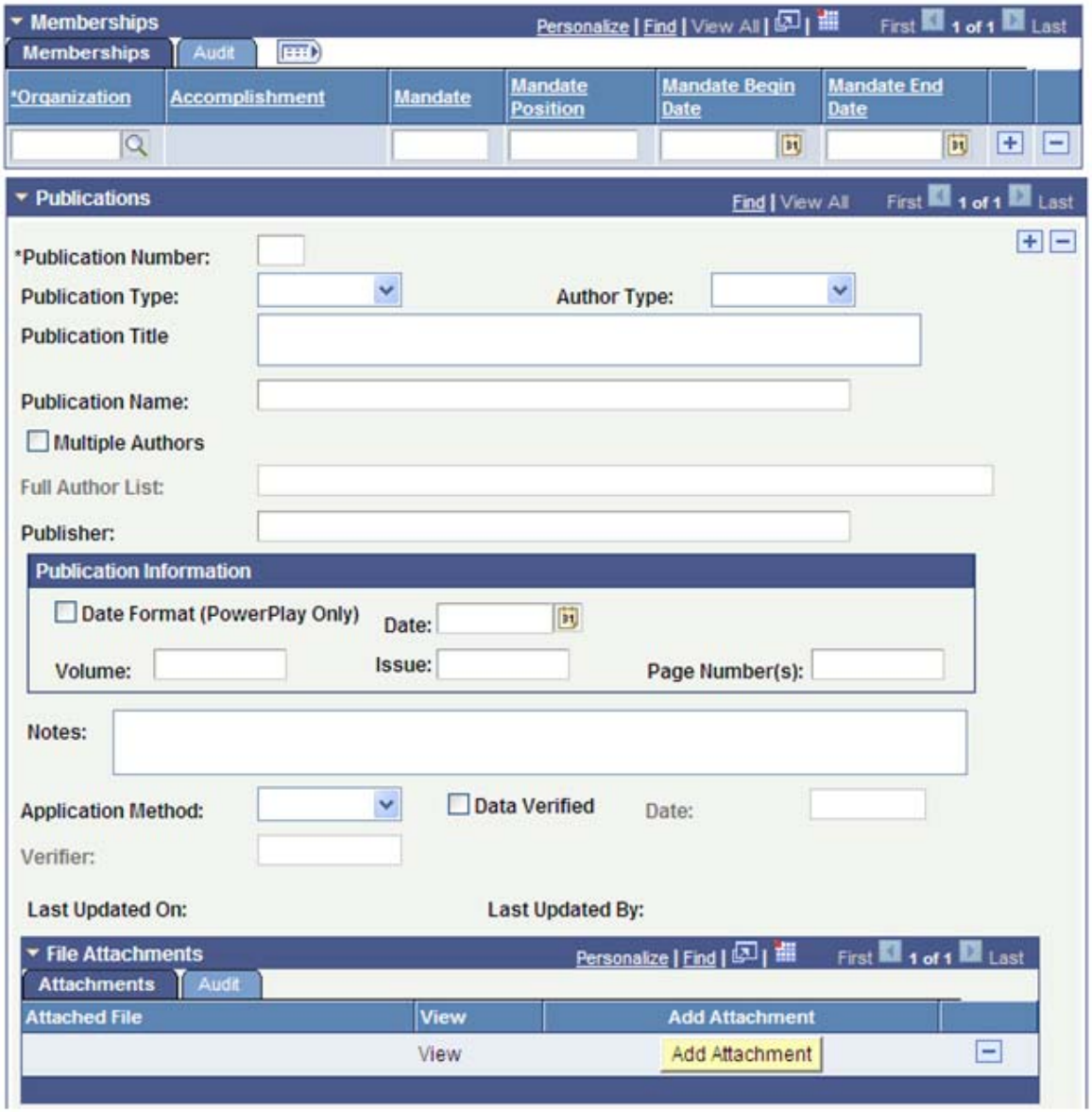

Participation Details page (4 of 5)

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Participation Details page (5 of 5)

Add Attachment Click this button to browse for any file you want to attach to the page. After attaching the file, click the View link to open it in a separate browser window, or click Add to attach multiple files.

Reviewing Constituent's Additional Personal Information

Access the Additional Personal Info page (Campus Community, Constituent Transaction Mgmt, Constituent Staging, Additional Personal Information).

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Summary Information | Constituent Details | Participation Details | **Additional Personal Info** | Regional

Temporary ID: 3801
User ID: TESTMF62
Created Datetime: 08/31/2011 10:22AM
Created By: TESTMF62

Name: Dam, Jan Willem
Constituent Status: Add New ID
ID:
Run Search/Match/Post
Expand All | Collapse All

Citizenship/Passport — Find | View All — First 1 of 1 Last

*Country: USA United States
Citizenship Status: Native
Last Updated On:
Last Updated By:

Passport Information — Find | View All — First 1 of 1 Last

*Passport Number: J7894561
Issue Date: 01/01/2010
Expiration Date: 01/01/2015
Country: USA United States
State: CA California
City: Los Angeles
Issuing Authority:
Comment:
Last Updated On:
Last Updated By:

Visa/Permit Data — Find | View All — First 1 of 1 Last

*Country: USA USA
*Type: AR1 Alien Registration
Number: 0001222
*Status: Applied
*Status Date: 08/31/2011
Issue Date: 01/01/2010
Duration Time: 2.0
*Duration Type: Years
Date of Entry into Country: 01/01/2010
Expiration Date:
Issuing Authority:
Issue Place:
Last Updated On:
Last Updated By:

Additional Personal Info page (1 of 7)

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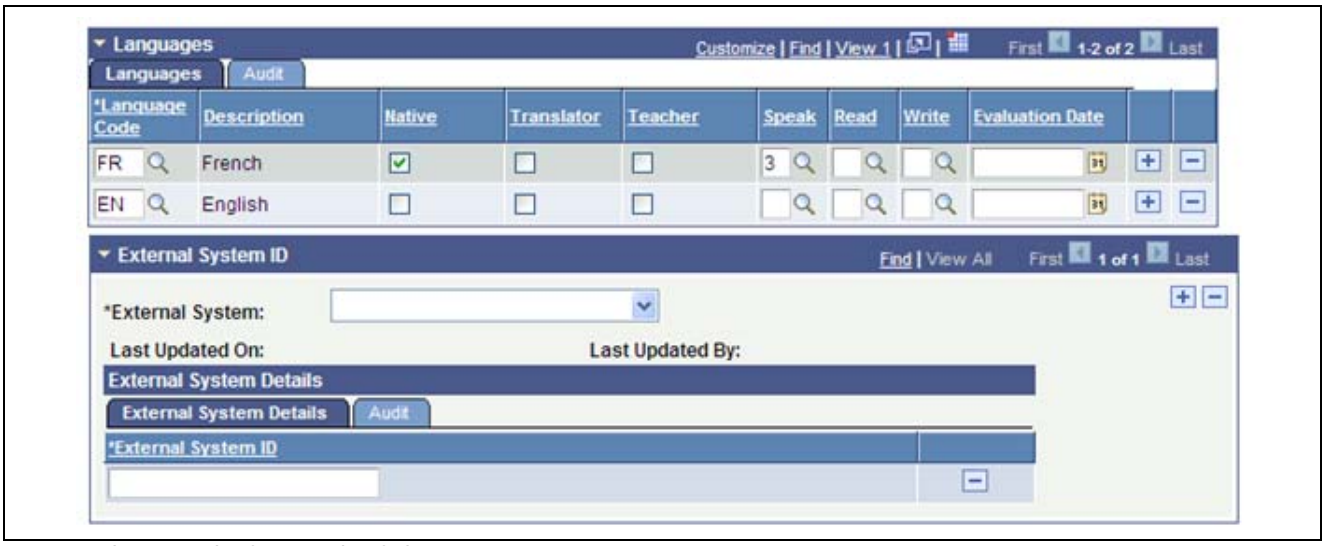
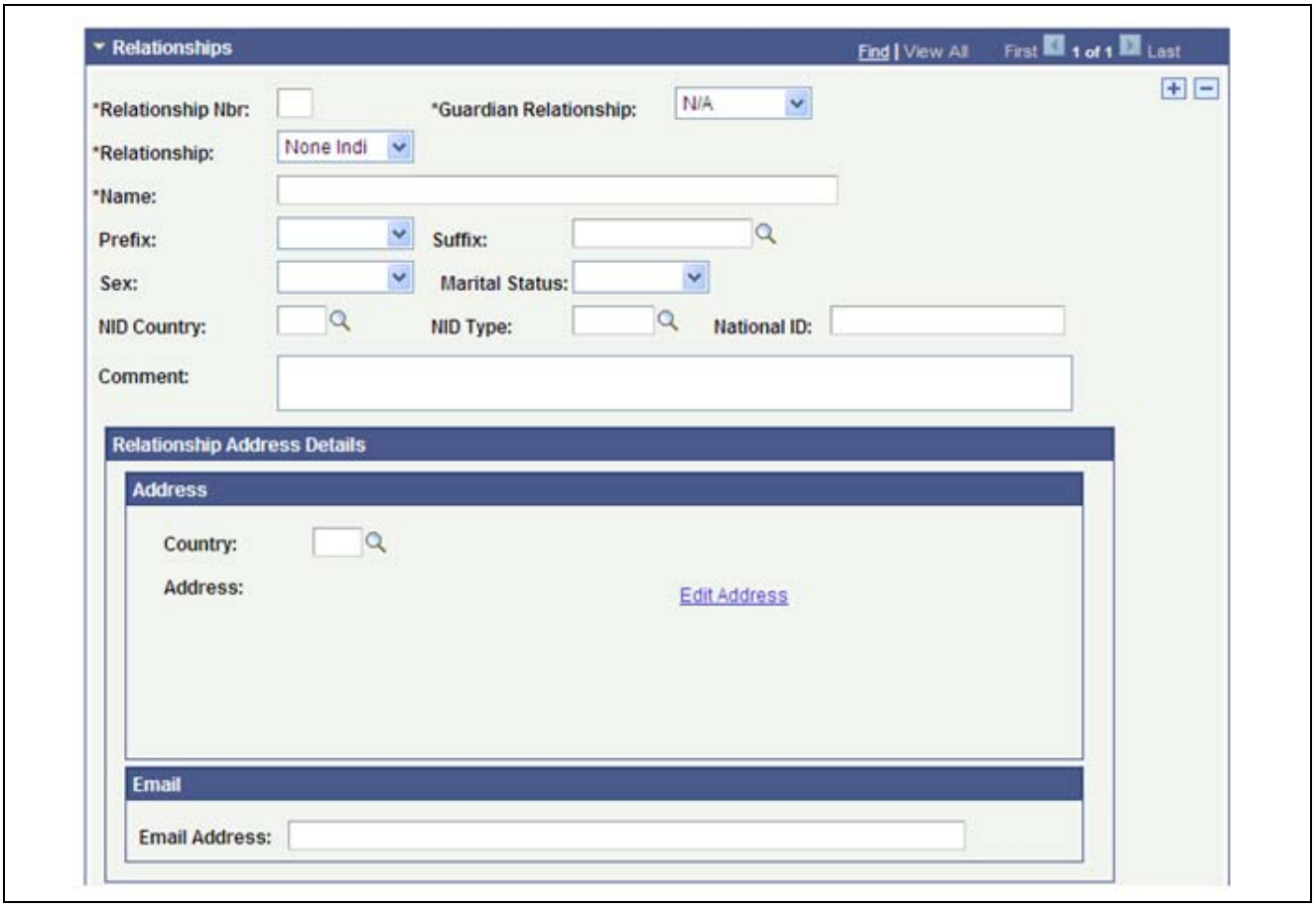


Additional Personal Info page (2 of 7)



Additional Personal Info page (3 of 7)

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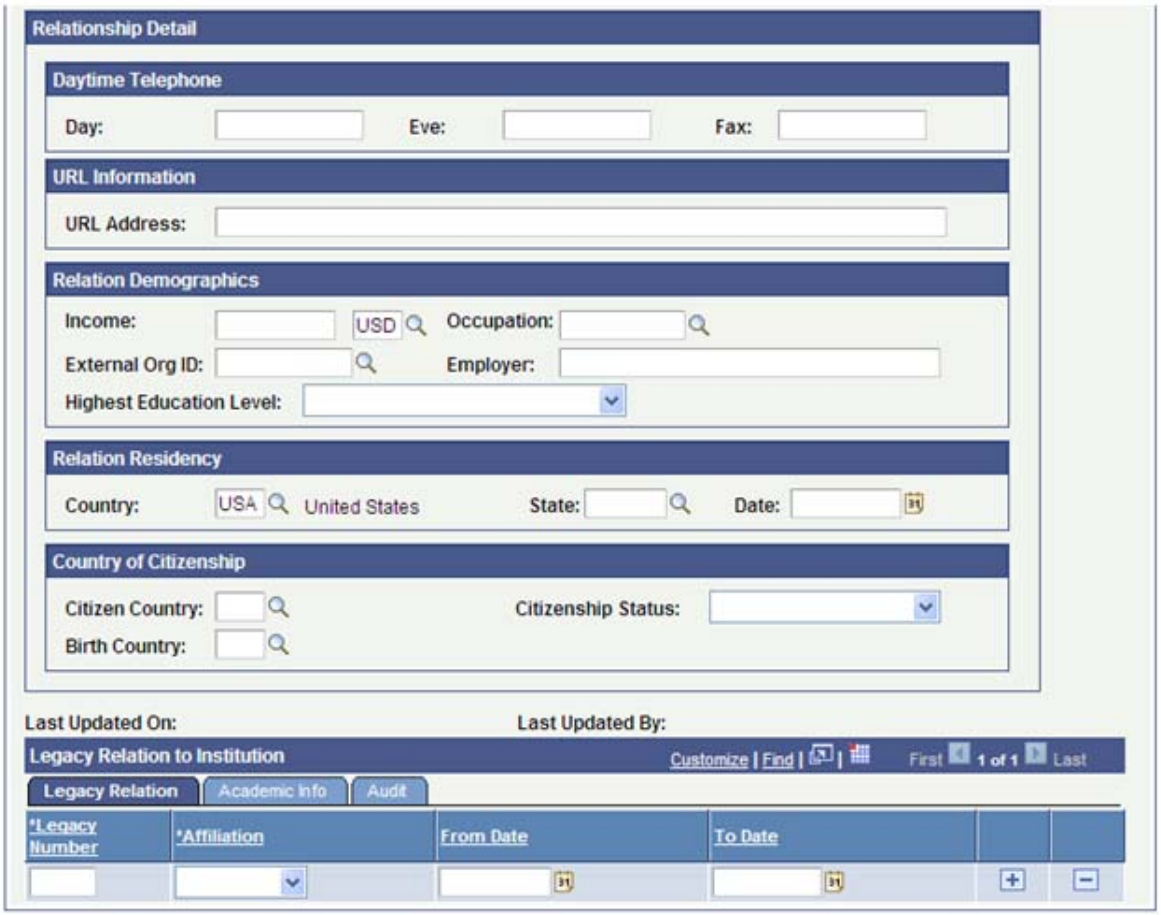

Additional Personal Info page (4 of 7)

Additional Personal Info page (5 of 7)

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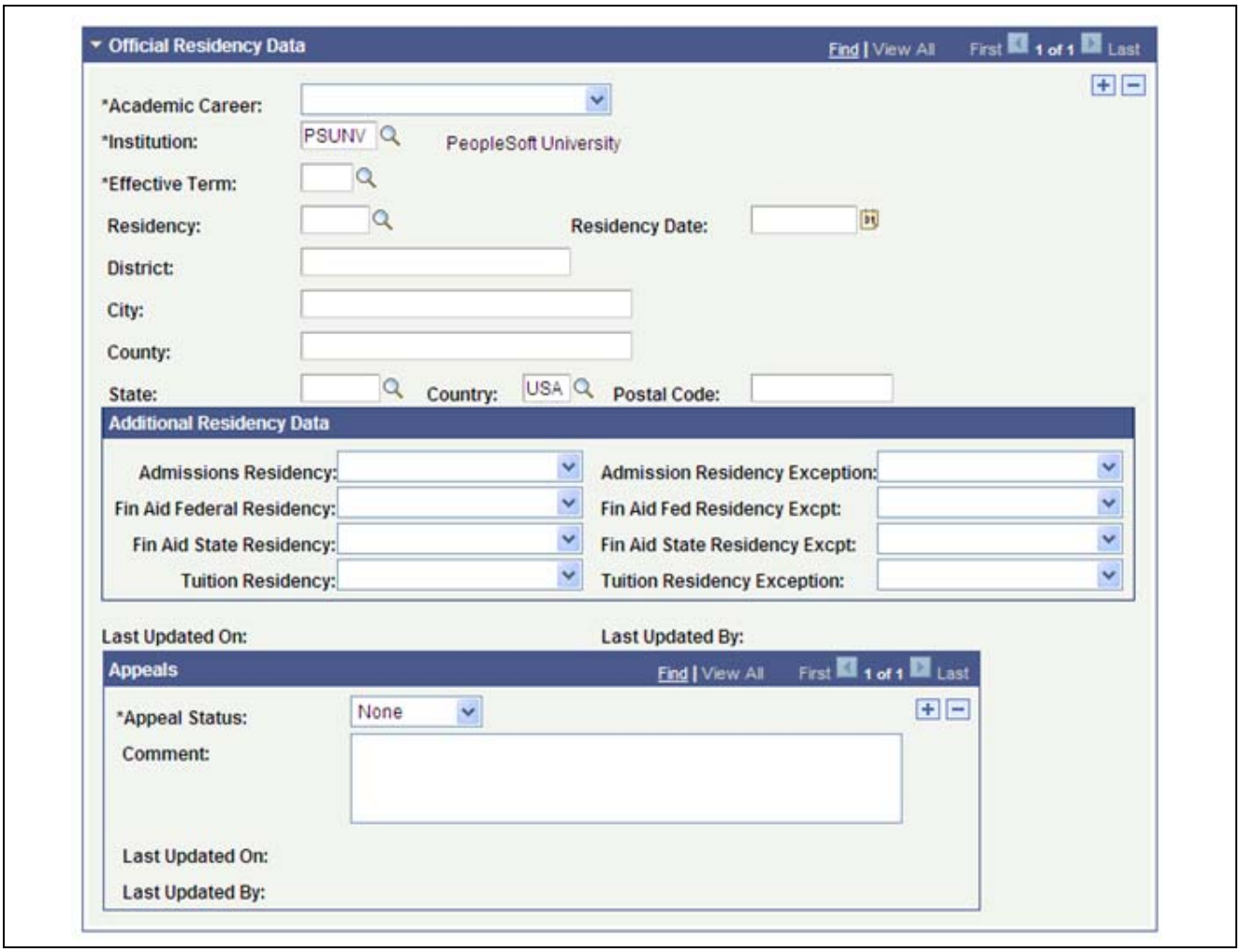

Additional Personal Info page (6 of 7)

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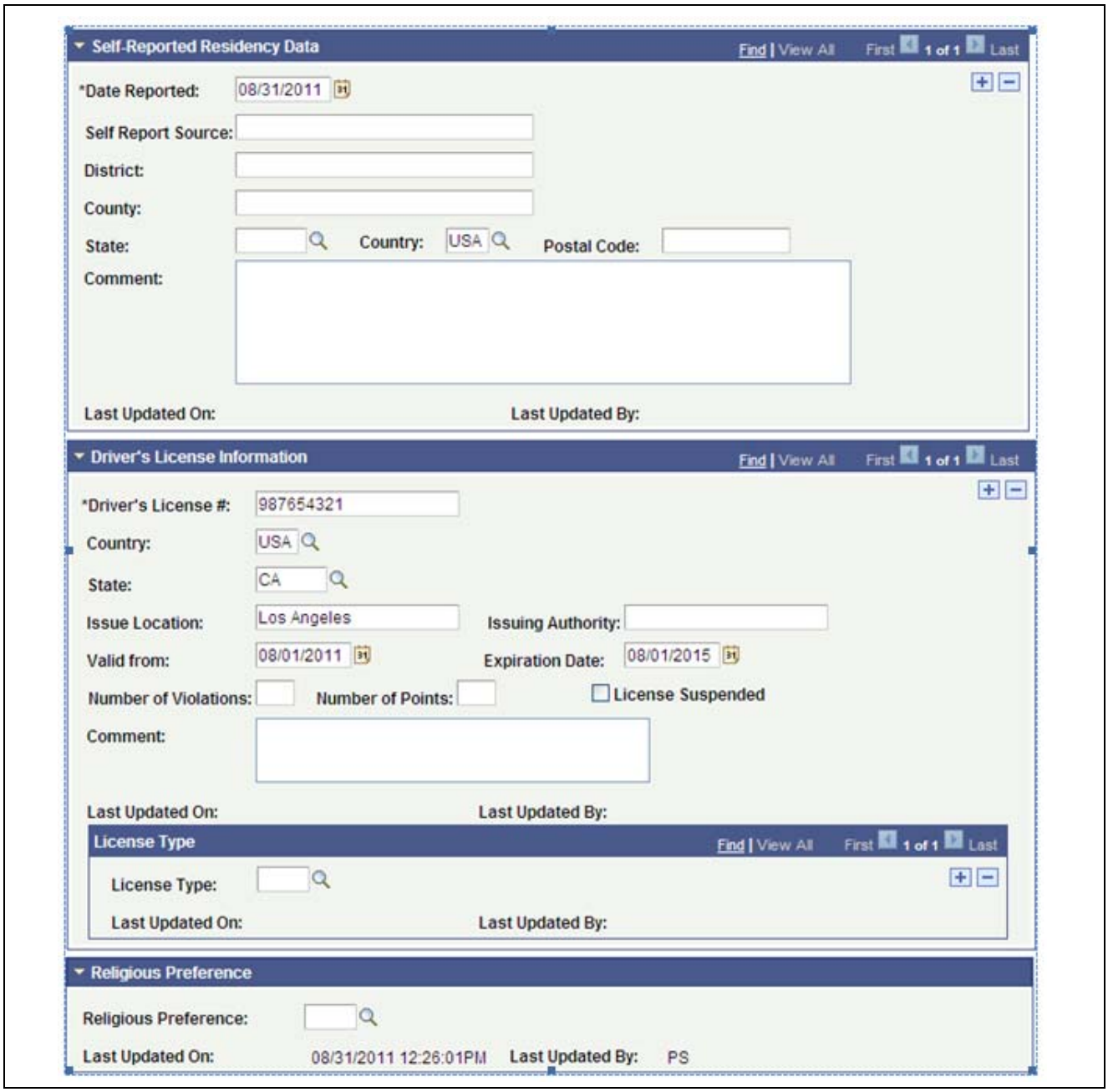

Additional Personal Info page (7 of 7)

Reviewing Constituent's Regional Information

Access the Regional page (Campus Community, Constituent Transaction Mgmt, Constituent Staging, Regional).

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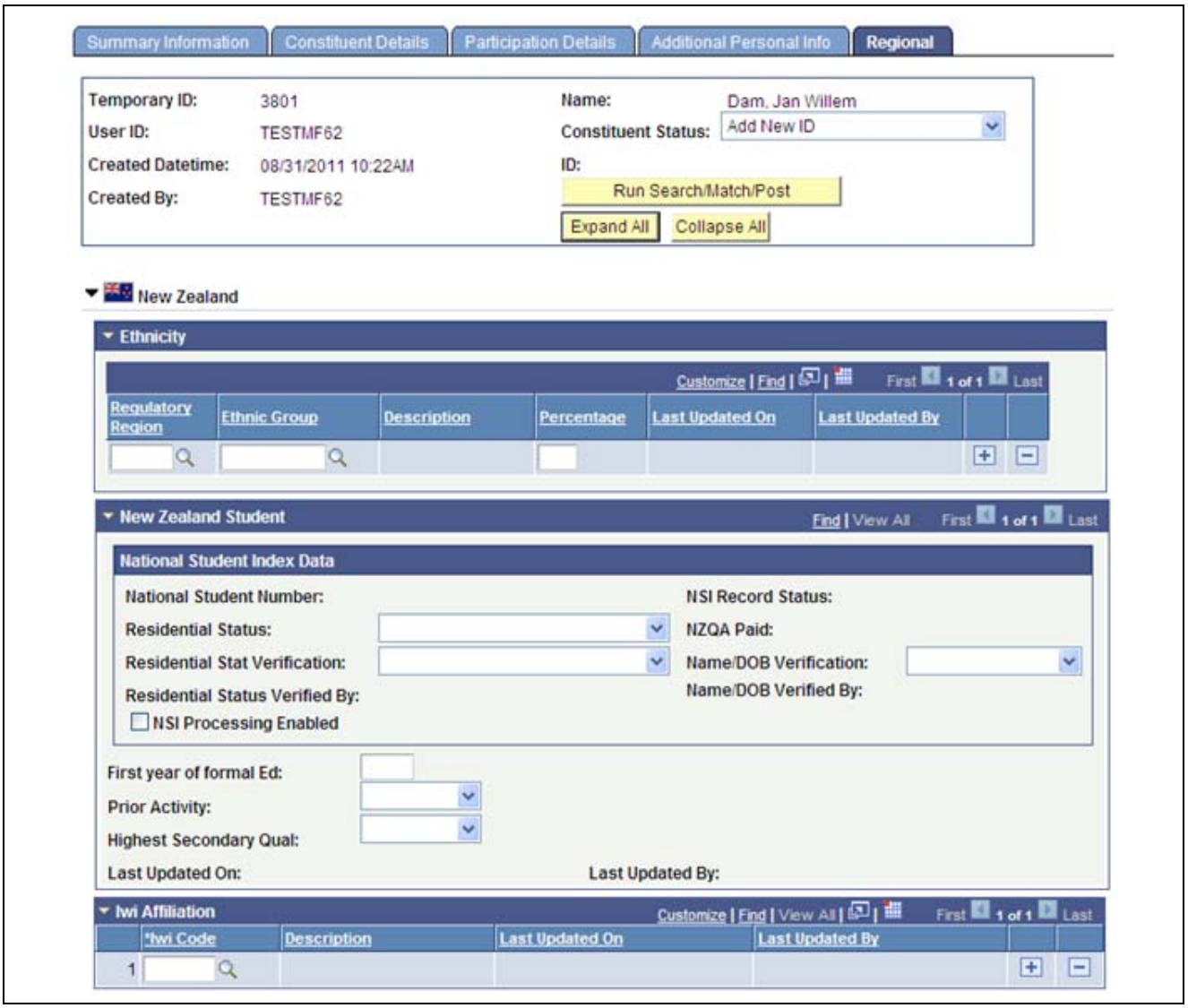

Regional page (1 of 9)

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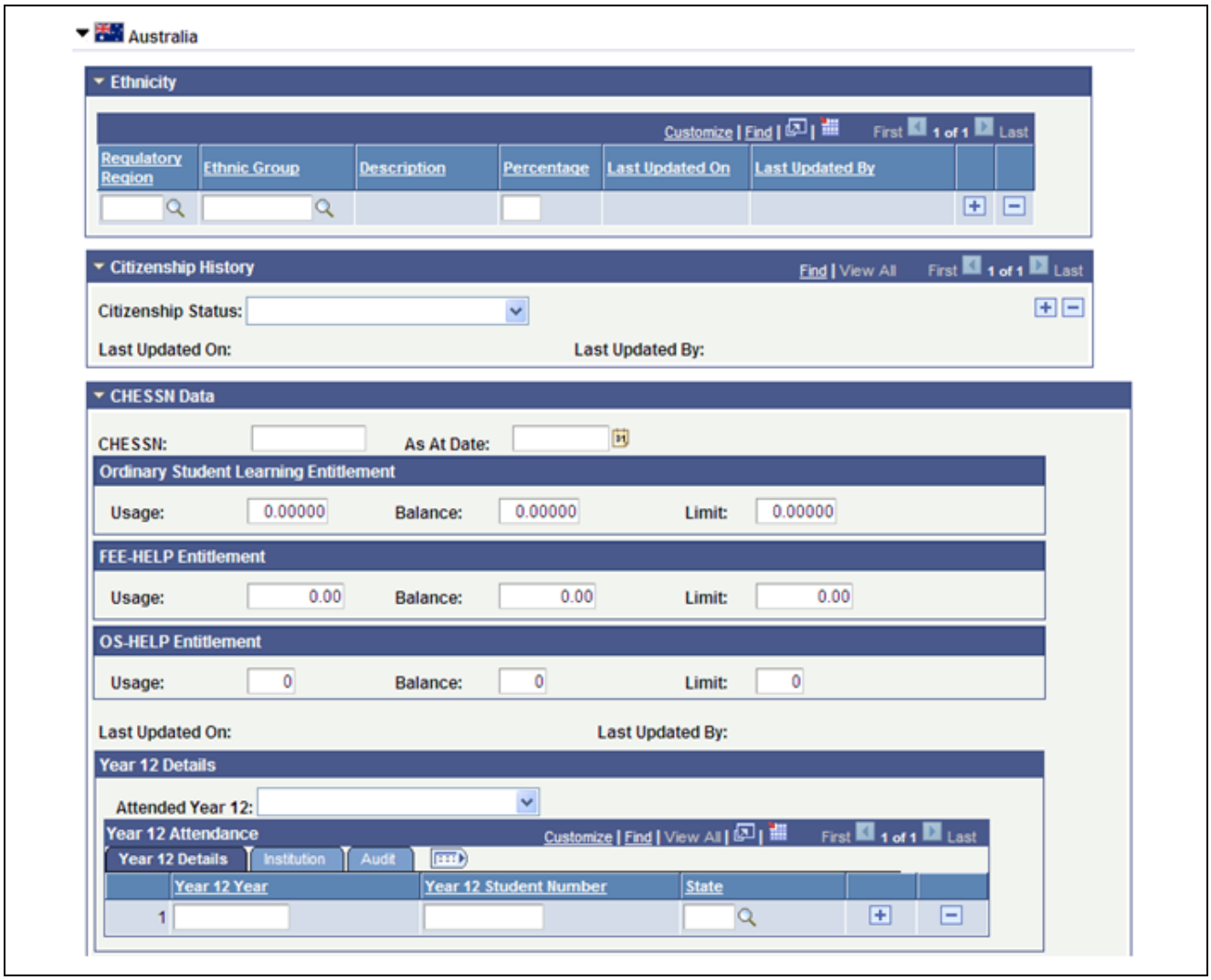

Regional page (2 of 9)

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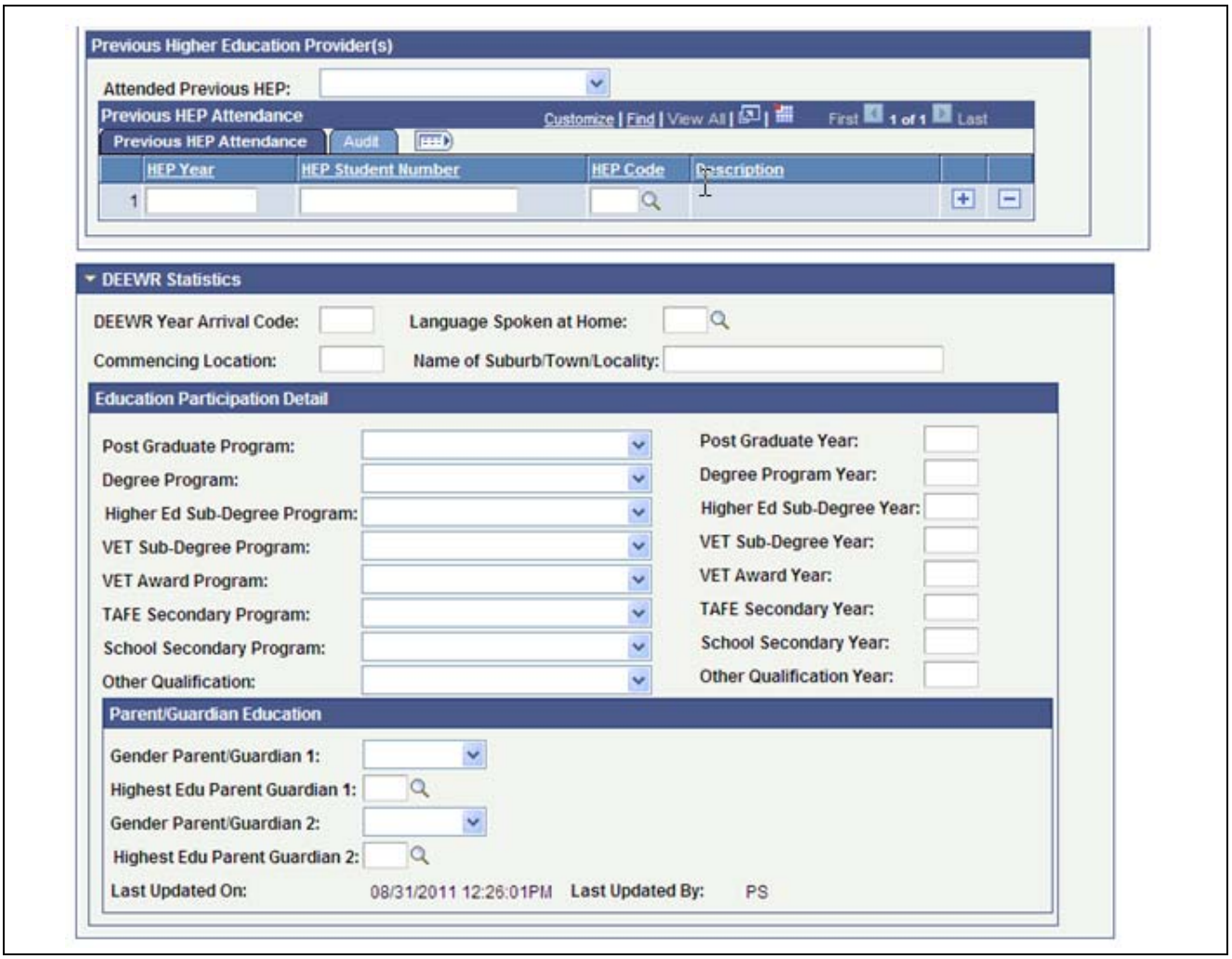

Regional page (3 of 9)

Regional page (4 of 9)

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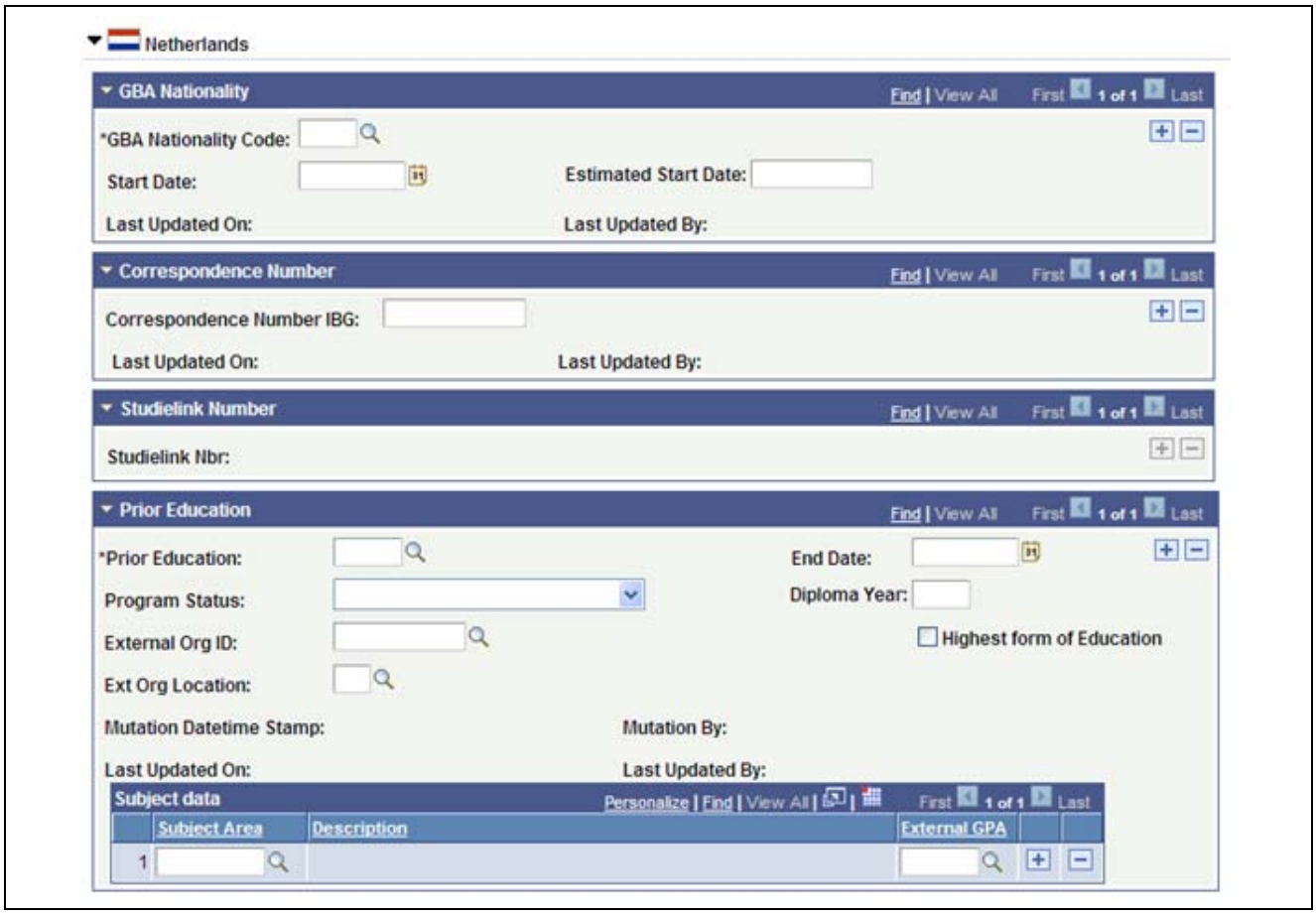

Regional page (5 of 9)

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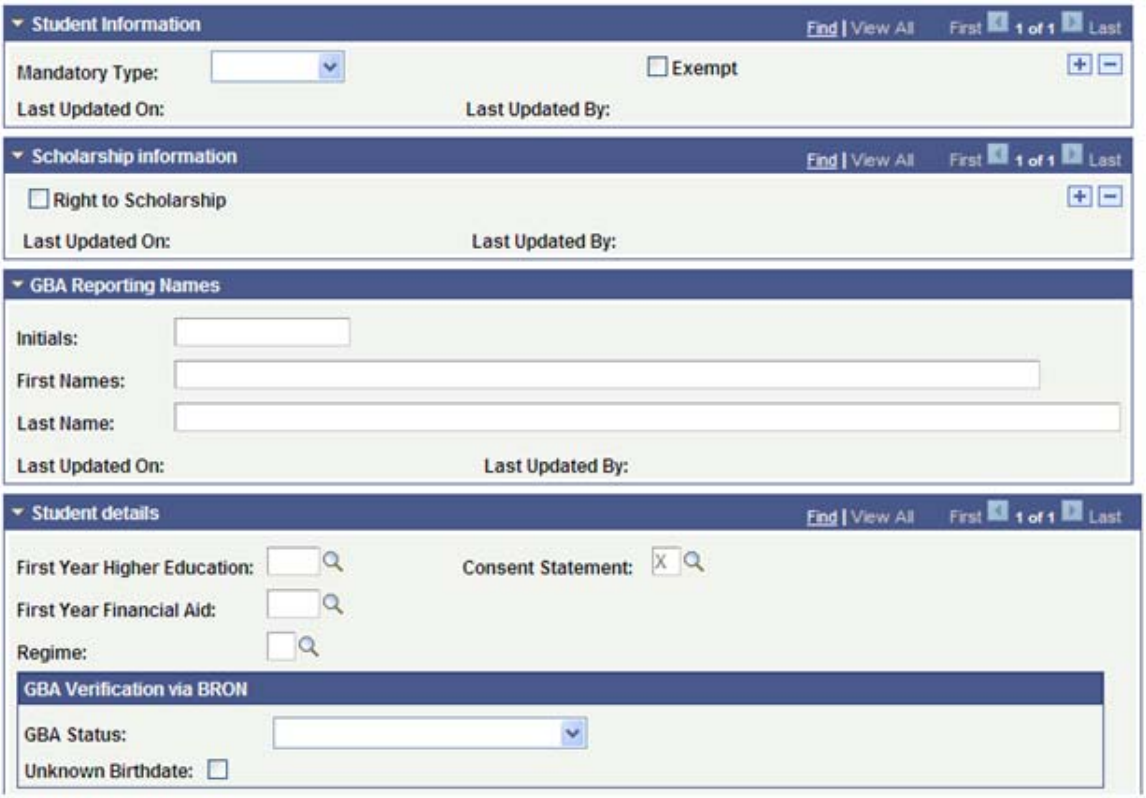
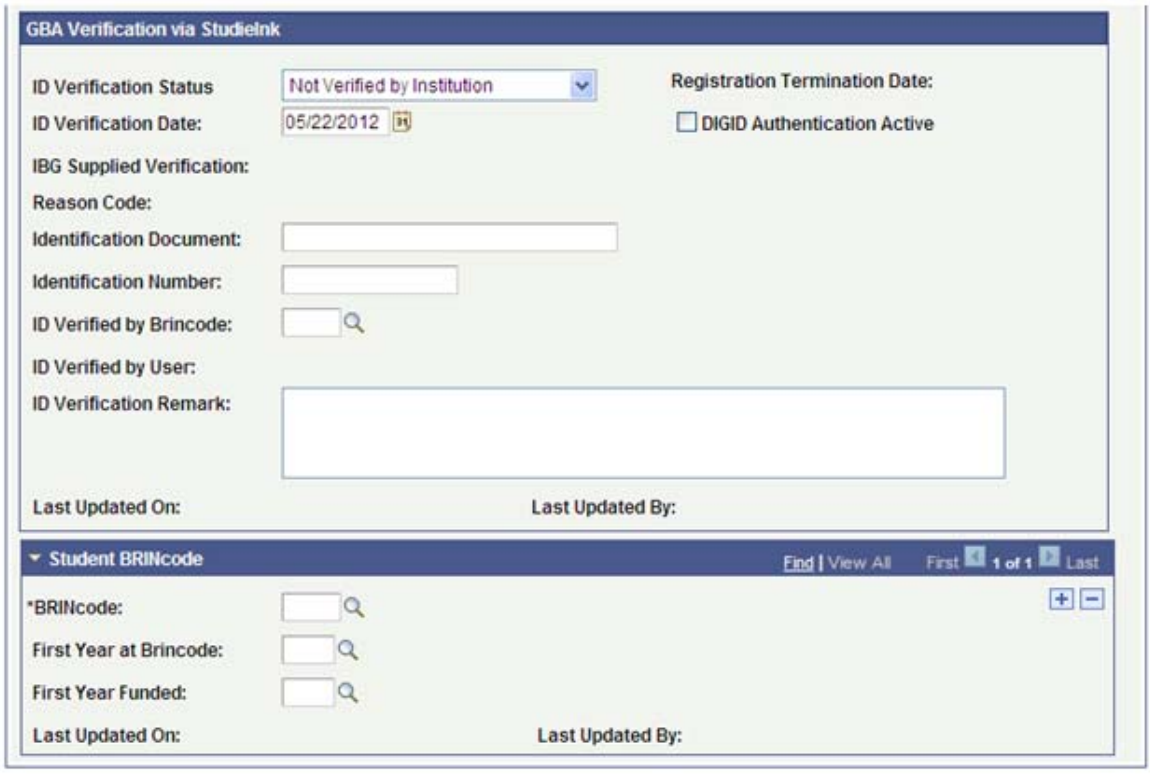


Regional page (6 of 9)



Regional page (7 of 9)

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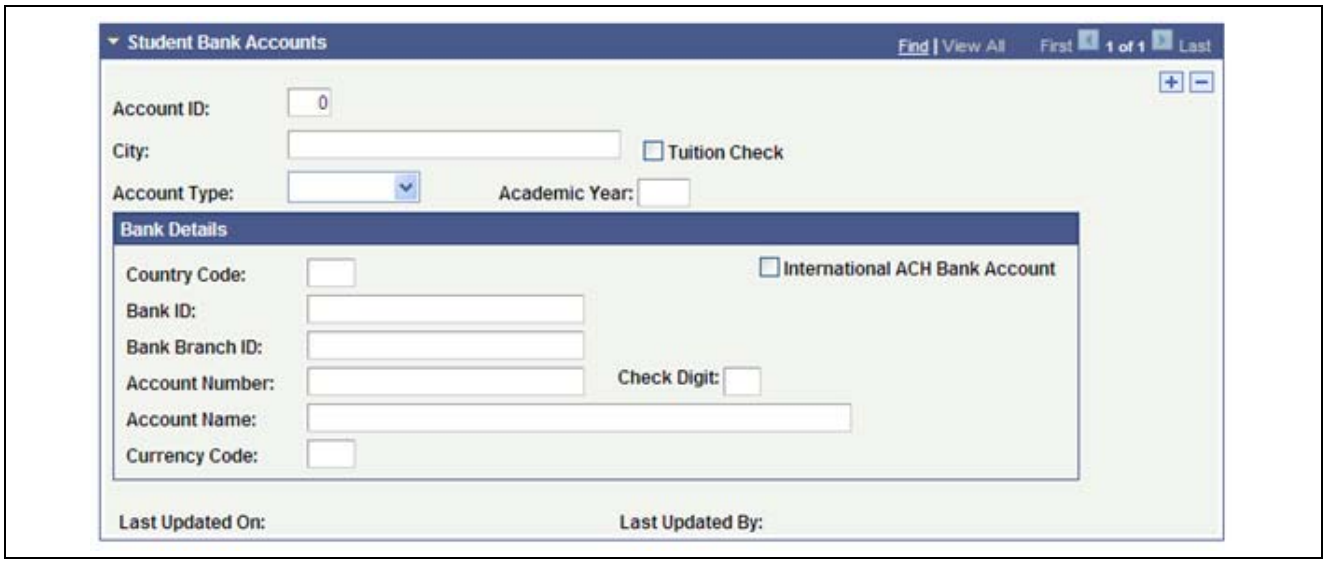
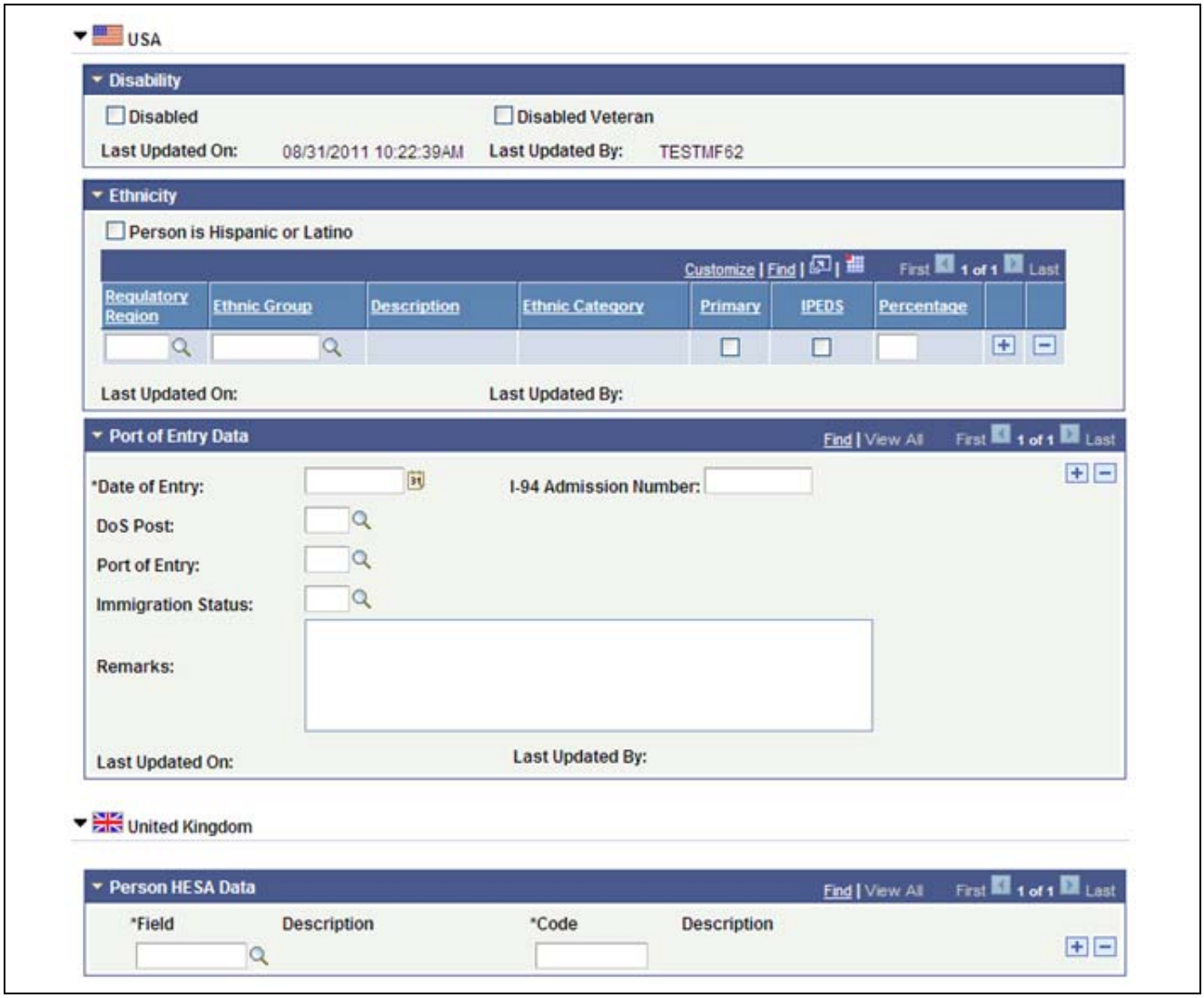


Regional page (8 of 9)



Regional page (9 of 9)

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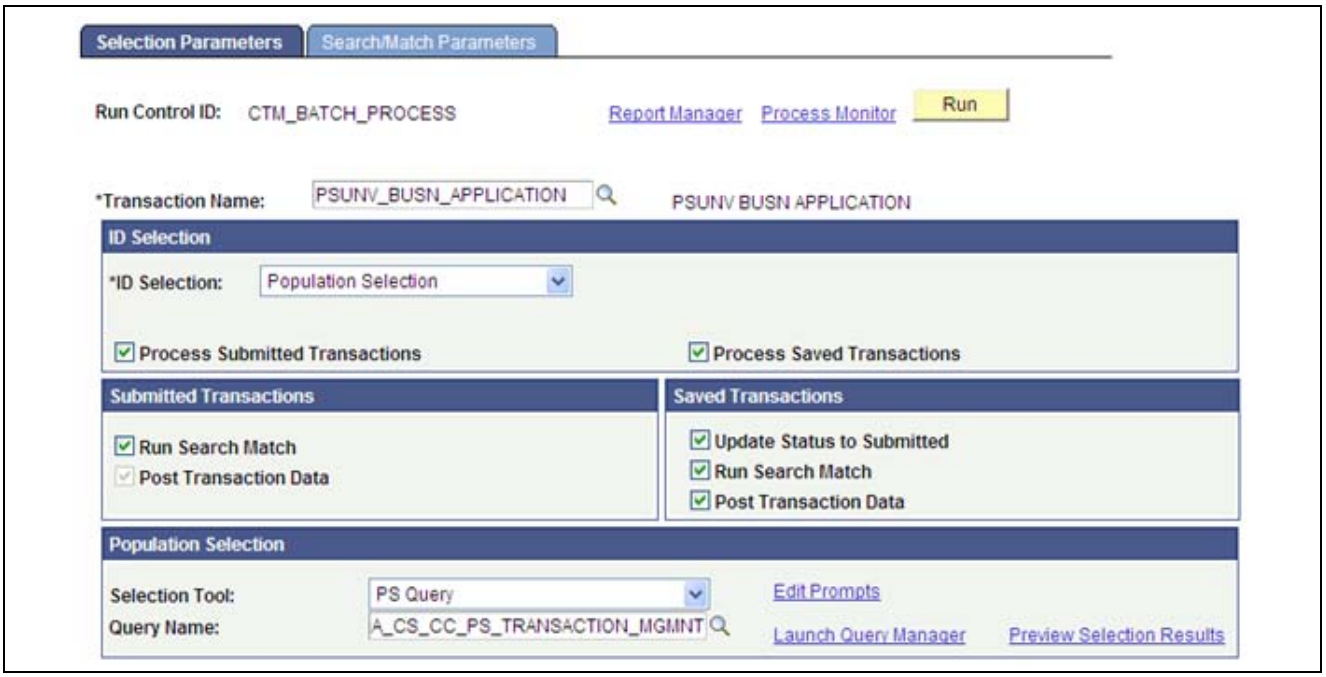
Running Transaction Management Process

Access the Selection Parameters page (Campus Community, Constituent Transaction Mgmt, Transaction Management Process, Selection Parameters).



Selection Parameters page

Use this functionality to process temporary constituent IDs stored inside the constituent and the transaction staging tables. You can process all IDs, just one at a time, or use Population Selection to select staged IDs meeting custom criteria. You can decide to only process the submitted transactions, the saved transactions, or a combination of both. The process allows you to change the transaction status from *Saved* to *Submitted*, run Search/Match and once an EMPLID is identified, post the constituent and transaction data to production tables. The Transaction Management process does not process IDs with a Constituent Status set to *Cancelled* or for which their transaction is already *Posted.* It also does not run the Search/Match process when an EMPLID is already identified or the Constituent Status is set to *Ignored*, *Suspended*, or *Error.* When an ID is set to be suspended, only manual intervention performed from the Constituent Staging component can be done to reset the status to something else after evaluation. For instance, a self-service user submits an online transaction. Search/Match found one exact match and the transaction was set up to suspend the constituent if this condition is encountered. The suspended record requires manual intervention by the administrative user to validate whether the matching candidate found should be updated or not.

Regardless of how the post process is run, if it encounters any problems during processing, it will assign the record a transaction status of *Saved Error* or *Submitted Error.* Use the Constituent Staging and the transaction staging components to review these errors.

Transaction Name Select the transaction for which you want to process the constituent and their transactions.

ID Selection

ID Selection Select one of these values:

All Person Temporary IDs: Select to run the process for all the persons in the staging record who are associated with the selected transaction name.

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One Person Temporary ID: Select to run the process for a single person (constituent) in the staging record who is associated with the selected transaction name.

Population Selection: Select if you want to use the population selection process for selecting the temporary IDs who are associated with the selected transaction name.

Temporary ID Available only when the ID Selection is *One Person Temporary ID.* You must enter the specific constituent temporary ID to process here.

Note. The field prompt does not display the Temporary IDs that have a Constituent Status set to *Cancelled, Ignore,* or *Suspended* or a Transaction Status set to *Posted, Saved Error, Submitted Error,* or *Pending.*

Process Submitted Transactions Select if you want the system to process transactions that have a transaction status of *Submitted.* When you select this option, the Submitted Transactions box appears.

Process Saved Transactions Select if you want the system to process transactions that have a transaction status of *Saved.* When you select this option, the Saved Transactions box appears.

The system posts only *submitted* transactions to the database.

Submitted Transactions

This group box appears only when the Process Submitted Transactions option is selected.

Run Search Match Select to run Search/Match for the *Submitted* transactions.

Post Transaction Data Select to post the *Submitted* transactions.

Note. When processing submitted transactions, the component forces you to select both check boxes. This is to ensure that you are not introducing duplicates into your database. Once an ID (EMPLID) is identified, whether it is because Search/Match created or updated an ID, or because an ID was already identified, the process validates and posts the transaction data immediately.

Saved Transactions

This group box appears only when the Process Saved Transactions option is selected.

Update Status to Submitted Select to change the transaction status from *Saved* to *Submitted.*

Note. This option is particularly useful when loading data in batch (for example when using File Parser) and setting the File Mapping Definition to assign the value *Saved* as the Transaction Status. Doing so allows you to review the staged data before it gets processed (Constituent Status is set to *Loaded* and Transaction Status is set to *Saved*). When ready to post the transactions, you can use the Transaction Management process to update the Transaction Status from Saved to *Submitted.*

Run Search Match Select to run Search/Match for the *saved* transactions. If the process identifies that a new ID needs to be created or an existing ID needs to be updated, the constituent data is automatically posted.

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When an EMPLID is already known to the system, Search/Match is not invoked by the process.

Post Transaction Data Select to post the transactions. Only submitted transactions can be posted. Therefore, to be able to select this check box, you must select the Update Status to *Submitted* and the Run Search Match check boxes. If you select all the three check boxes, the Transaction Management process will first change the status to *Submitted*, then it runs Search/Match and finally depending on the Search/Match parameters it posts the transactions.

Population Selection

This group box appears only when the ID Selection of *Population Selection* is selected.

Population selection is a method for selecting the IDs to process for a specific transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the Transaction Management process and on your user security. Fields in the group box appear based on the selection tool that you select. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Using the Population Selection Process”

Specifying Search/Match Parameters for Batch Processing

Access the Selection Parameters page (Campus Community, Constituent Transaction Mgmt, Transaction Management Process, Search/Match Parameters).

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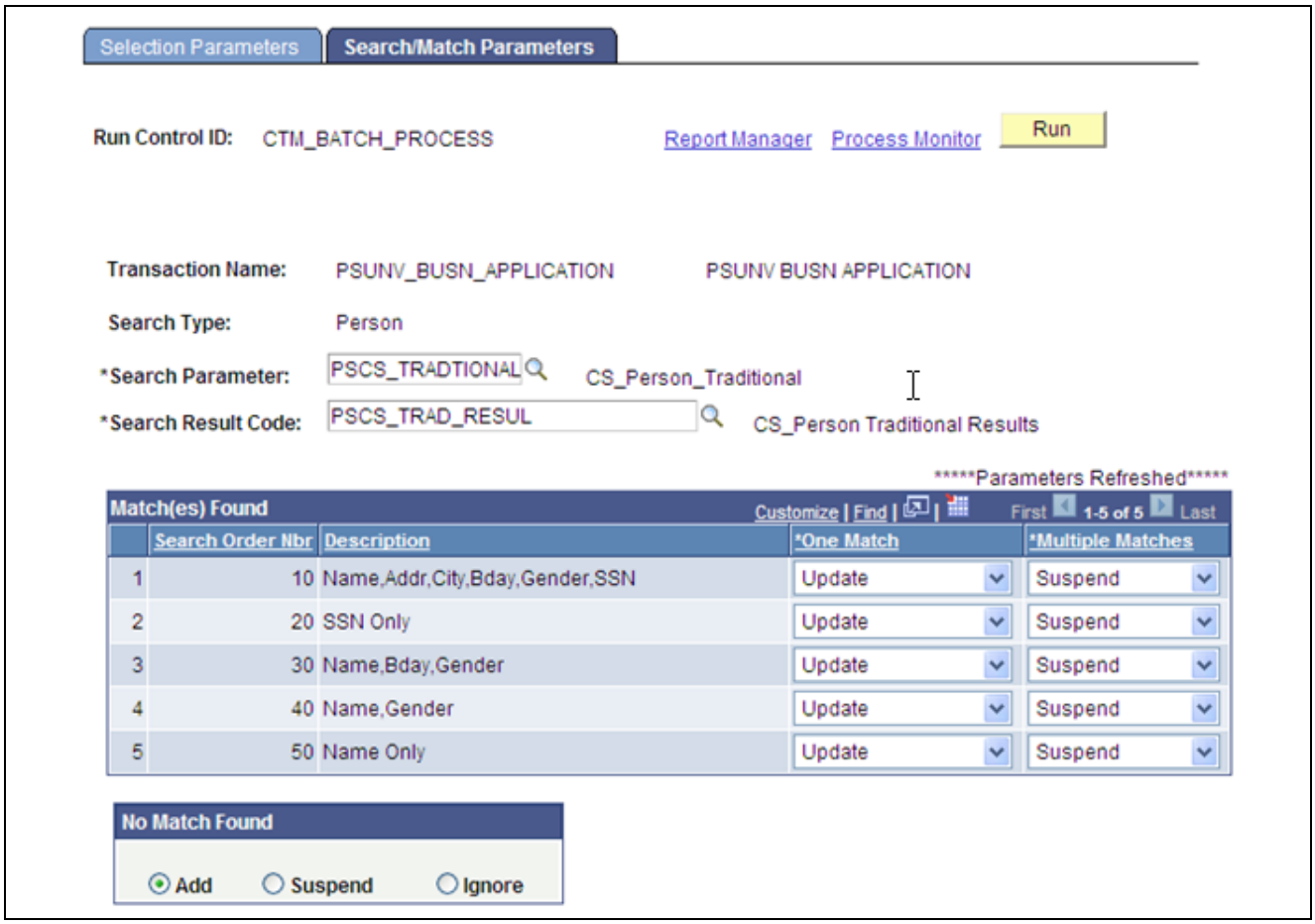

Search/Match Parameters page

Use this page to set up your Search/Match parameters. These are the rules that determine what the post process should do with the staging record after the Search/Match process is complete. The fields on this page are similar to the Search/Match Setup page (Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, Transaction Setup, Search/Match Setup). The Search/Match parameters that you define for the Transaction Management process overrides the Search/Match parameters set up on the Transaction Setup component.

Developer Reference for Creating a New CTM Consumer

Take advantage of the CTM framework to create your own consumers of CTM. The CTM transactions created for a consumer can be performed online or offline by your users. Use the steps discussed in this section as guidelines to do so.

Warning! Creating a CTM consumer is a technical effort and requires knowledge of Application Designer, web services, Integration Broker, and Entity Registry,

The below diagram shows all the steps in the appropriate order that need to be performed to create your own CTM consumers using the CTM framework:

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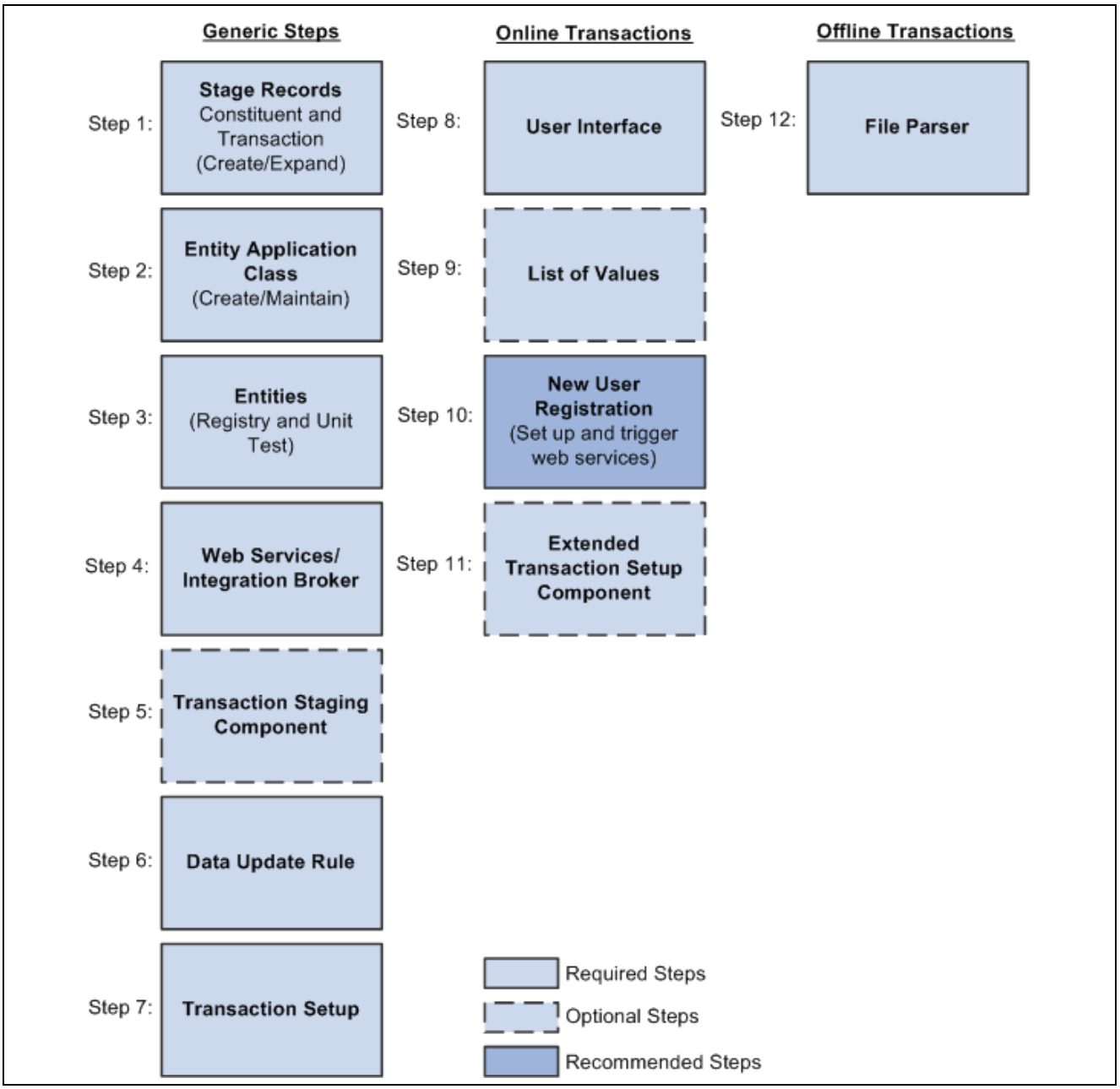

Creating a new consumer of CTM

This section discusses:

- Step 1: Creating or extending staging tables.
- Step 2: Creating or maintaining an entity application class.
- Step 3: Creating or maintaining entities.
- Step 4: Creating or maintaining web services.
- Step 5: Creating a transaction staging component – optional.
- Step 6: Setting up data update rules.
- Step 7: Setting up a transaction.

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- Step 8: Creating a user interface (for online transactions only).
- Step 9: Setting up list of values – optional (for online transactions only).
- Step 10: Setting up New User Registration - optional (for online transactions only).
- Step 11: Creating a setup component for a transaction – optional (for online transactions only).
- Step 12: Setting up File Parser (for offline or batch transactions only).

Step 1: Creating or Extending Staging Tables

A staging record used with CTM must be keyed by Temporary ID (SCC_TEMP_ID field) (high level key). This field is a unique identifier that helps keeping track of staged transactions. The rest of the keys for a staging record are similar to the equivalent production record. It is never effective-dated (even if the matching production record is effective-dated). This is because the data entered in staging records can be updated, modified many times prior to be posted to production. Only at that time, the data is current and therefore the production record gets set with the date the data is posted.

Example: Suppose your CTM transaction captures admissions data and you also want to ask specific questions for which the user can select from answers that are displayed on the user interface. Assume the production record to store the answers to the questions is named SCC_EXTN and its definition is as follows:

Record Fields | Record Type

Num	Field Name	Type	Key	Ordr	Dir	CurD	Srch	List	Sys	Audt	InAu	EnAuto	Default
1	EMPLID	Char	Key	1	Asc		No	No	No		No	No	
2	ADM_APPL_NBR	Char	Key	2	Asc		No	No	No		No	No	
3	SEQNO	Nbr	Key	3	Asc		No	No	No		No	No	
4	DESCR100	Char					No	No	No		No	No	
5	QUESTION_ANSWER	Char					No	No	No		No	No	

Production record definition (SCC_EXTN)

Its equivalent staging record definition (for example, call it SCC_EXTN_STG record) should be defined as follows:

Record Fields | Record Type

Num	Field Name	Type	Key	Ordr	Dir	CurD	Srch	List	Sys	Audt	InAu	EnAuto	Default
1	SCC_TEMP_ID	Nbr	Key	1	Asc		No	No	No		No	No	
2	ADM_APPL_NBR	Char	Key	2	Asc		No	No	No		No	No	
3	SEQNO	Nbr	Key	3	Asc		No	No	No		No	No	
4	DESCR100	Char					No	No	No		No	No	
5	QUESTION_ANSWER	Char					No	No	No		No	No	
6	SCC_AUDIT_SBR	SRec					No	No	No		No	No	
	SCC_ROW_ADD_OPRID	Char					No	No	No		No	No	
	SCC_ROW_ADD_DTTM	DtTm					No	No	No		No	No	
	SCC_ROW_UPD_OPRID	Char					No	No	No		No	No	
	SCC_ROW_UPD_DTTM	DtTm					No	No	No		No	No	

Matching Staging record definition (SCC_EXTN_STG)

The *Staging* table holds the staged data before it gets promoted to its matching production table.

Later, you will link the newly created staging record with its matching production record through an entity defined in the Entity Registry component (See "Developer Reference for Creating a New CTM Consumer", Step 3: *Creating Entities* section of this chapter).

For CTM, the staging record that you select in the Entity Registry component for the parent entity is referred as the parent staging record. Other than including the SCC_TEMP_ID field as a key like the other staging records, ensure that the parent staging record also includes the following additional fields:

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- SCC_TRANSAC_CD (Transaction Code)
- SCC_TRANS_STS (Transaction Status)
- SCC_TRANS_STS_DT (Transaction Status Date)
- SCC_AUDIT_SBR record for audit tracking
- Any other fields related to your transaction.

Later, you will also enter the parent staging record for the Transaction Code in the Transaction Setup component (See "Developer Reference for Creating a New CTM Consumer", Step 7: *Setting Up Transaction* section of this chapter).

The following is an example of how the parent staging record SAD_APL_DAT_STG, contained in the *Application* parent entity (delivered with the AAWS admission transaction), is defined in the Entity Registry component:

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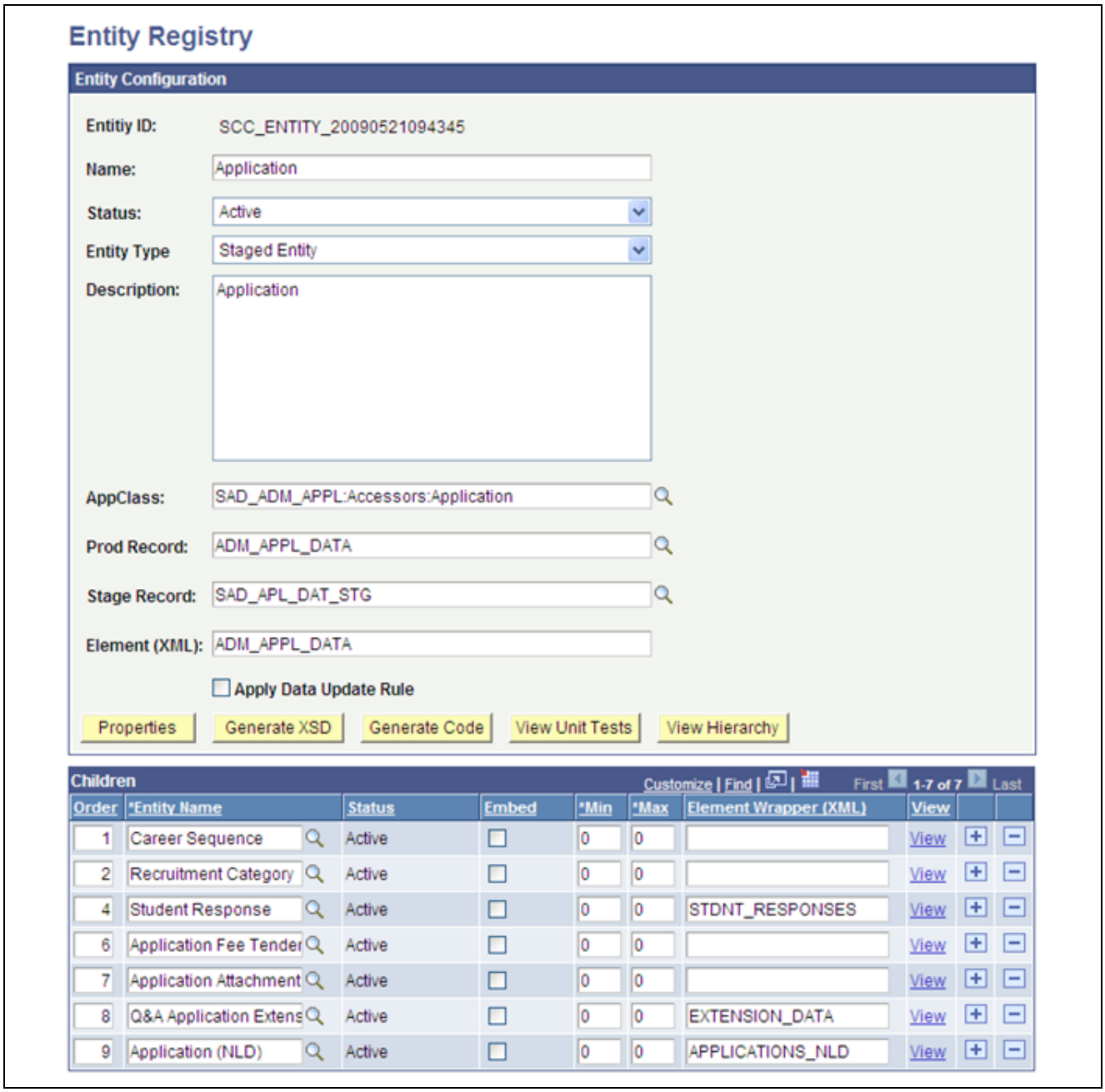

Example of Entity Registry component with the parent staging record for the parent entity Application

The following is an example of how the SAD_APL_DAT_STG parent staging record (delivered with the AAWS admission transaction) is defined in the Transaction Setup component for the transaction code ADMISSIONS_APPLICATION:

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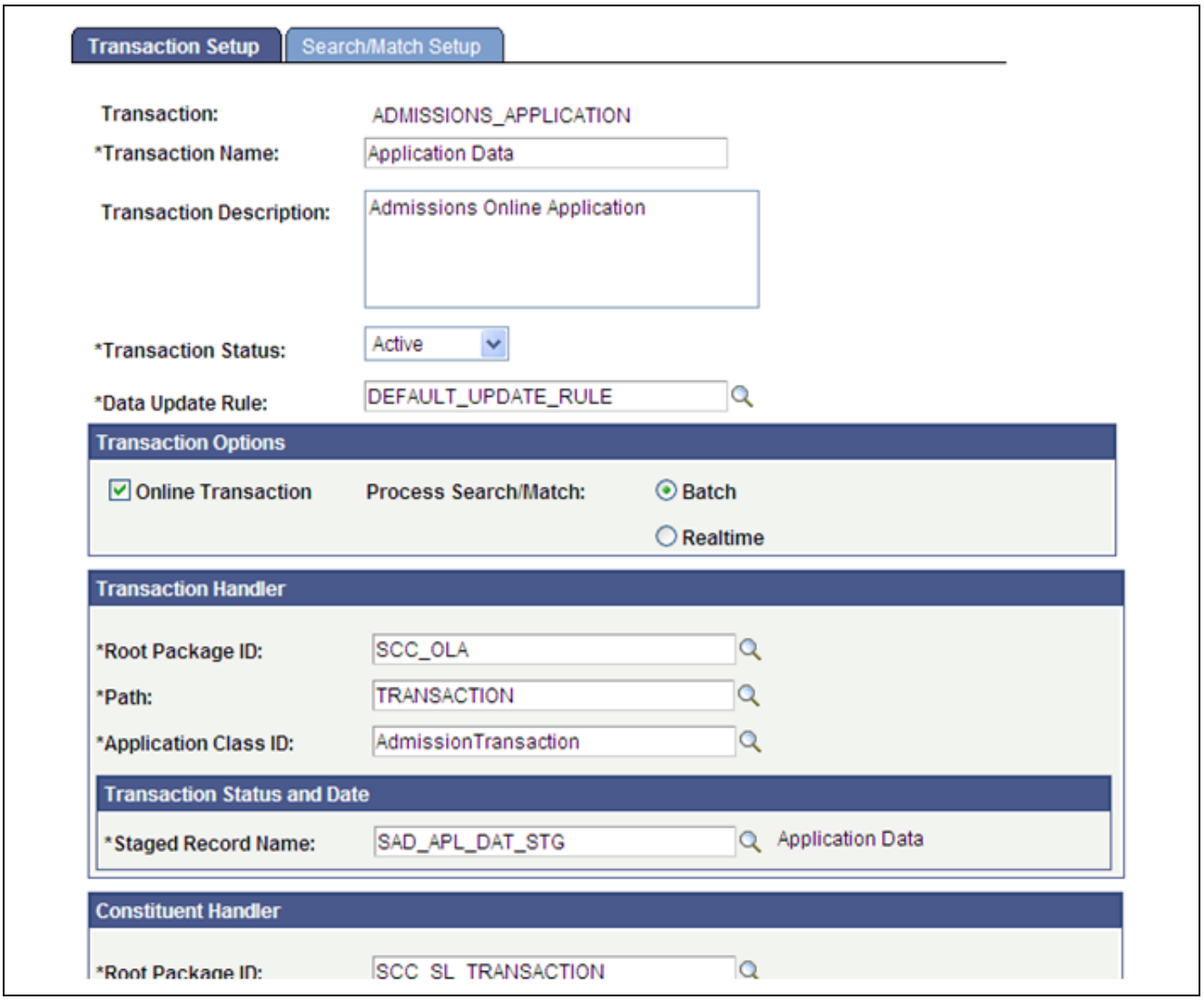

Example of Transaction Setup component with the SAD_APL_DAT_STG parent staging record for AAWS transaction

See *See PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up Entity Registry"

Step 2: Creating an Entity Application Class

Along with the staging records you created for your CTM transaction (whether they are constituent staging records or transaction-specific staging records), you can create a supporting application class for each combination of staging and matching production records. Generally, this application class provides the properties, and adds any custom validation, pre-save, or *setDefault* logic. However, because it is an application class, anything can be overridden. To see all the methods refer to the Entity Registry PeopleBook chapter. The created application class needs to be entered in the Entity Registry component for the corresponding entity name.

Note. The application class can be created blank. Entity Registry can help generate the needed base code, which can then simply be copied and pasted into application designer.

The following is an example of the SCC_SL_TRANSACTION:INTFC application package that comprises the delivered application classes used by CTM:

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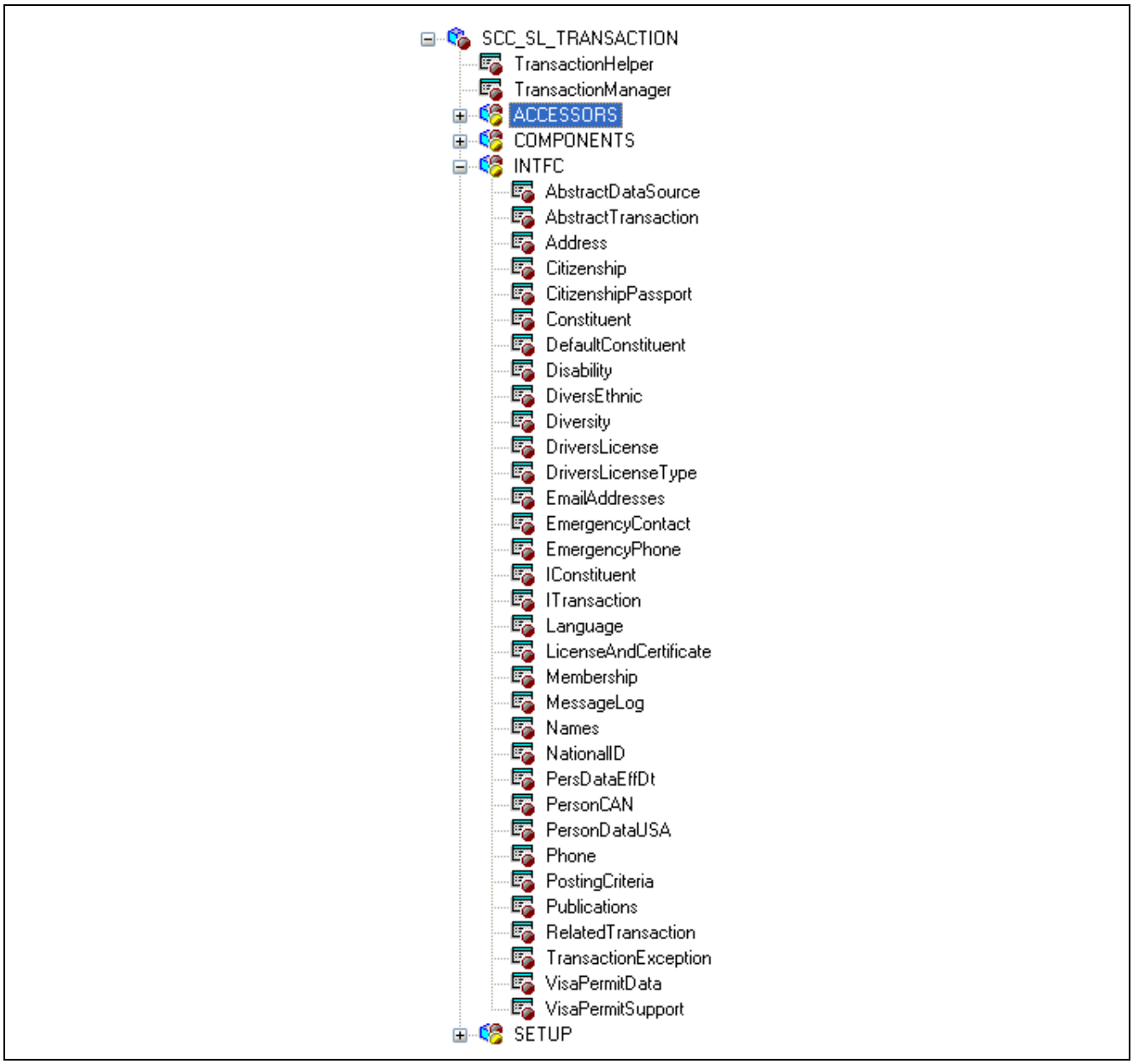

Example of application classes used by CTM

Note. If you created a new constituent entity, we recommend to not create the corresponding application class under the SCC_SL_TRANSACTION:INTFC application package. Instead, create a separate application package. The reason being that any modifications made to the delivered application package is considered a customization and might be overridden when a bundle is delivered.

Note that this step is only to create a *shell* application class. You create a name for it using Application Designer, but the PeopleCode logic is created through Entity Registry.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up Entity Registry”, Creating a New Entity, for details on how to create application classes using the Entity Registry component.

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Step 3: Creating Entities

As mentioned in the previous subsection, the CTM framework takes full advantage of the Entity Registry feature. Each combination of staging record and production record along with their application class need its own entity. The new entity can be a parent entity or a child of an existing parent. For instance, the *Constituent* and the *Application* entities, delivered with your system, are parent entities of many children.

Register a new entity in the Entity Registry page (Set Up SACR, System Administration, Entity, Entity Registry).

When creating an entity that will be used as part of a CTM transaction, select an Entity Type that is defined to use both production and staging records. Two delivered Entity Types are set up that way:

- Staged HR Entity (use it if the production record is owned by HR).
- Staged Entity.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Setting Up Entity Registry", Creating a New Entity, for details on how to create application classes using the Entity Registry component.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Setting Up Entity Registry", Configuring Entity Types, Setting Up Entity Types

Step 4: Creating or Maintaining Web Services

CTM uses web services to move data to the production tables. If the CTM consumer you are creating involves transactions to be performed *online*, you can allow the self-service users to *Save* the transaction so that they can come back later to *Submit* when ready. If you choose to do so, you will need to create web services for the following actions:

- One service for the *Save* action.
- One service to retrieve a specific saved transaction.
- One service to retrieve multiple saved transactions.
- One service for the *Submit* action.

Use PeopleTools Integration Broker to create the web services.

Delivered with your system are the following AAWS web service operations constructed for the delivered CTM admission transaction. You can use them as samples to create your own web services.

Service	Service Operation	Operation Type	Messages	Action
SAD_ADMISSIONS	SAD_CREATEAPPL	Synchronous	SAD_CREATEAPPL_REQ SAD_CREATEAPPL_RESP SAD_FAULT_RESP	Creates the application.
SAD_ADMISSIONS	SAD_GETAPPL	Synchronous	SAD_GETAPPL_REQ SAD_GETAPPL_RESP SAD_FAULT_RESP	Retrieves one specific application.

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Service	Service Operation	Operation Type	Messages	Action
SAD_ADMISSIONS	SAD_GETAPPLS	Synchronous	SAD_GETAPPLS_REQ SAD_GETAPPLS_RESP SAD_FAULT_RESP	Retrieves all applications for a defined individual.
SAD_ADMISSIONS	SAD_GETATTACH	Synchronous	SAD_GETATTACH_REQ SAD_GETATTACH_RESP SAD_FAULT_RESP	Retrieves attachments.
SAD_ADMISSIONS	SAD_SAVEAPPL	Synchronous	SAD_SAVEAPPL_REQ SAD_SAVEAPPL_RESP SAD_FAULT_RESP	Saves an application.
SAD_ADMISSIONS	SAD_SUBMITAPPL	Synchronous	SAD_SUBMITAPPL_REQ SAD_SUBMITAPPL_RESP SAD_FAULT_RESP	Submits an application.

Creation or update considerations for CTM:

- Service operations should be *synchronous* so request and response messages should be created.
- The Entity Registry component provides a utility called Generate XSD that creates a schema that can be used to create web service messages (through Integration Broker). Use it to update or create the schema for either the delivered messages or the messages you create.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Setting Up Entity Registry”, Creating a New Entity, for details on how to create application classes using the Entity Registry component.

Step 5: Creating a Transaction Staging Component – Optional

Delivered with CTM is the Constituent Staging component. The component enables an administrative user to review, update, and correct errors related to the staged *constituent* data entered for a CTM transaction. The component also enables the administrative user to process the transaction for which the constituent data was entered. But different consumers of CTM will probably also have *transaction-specific* data in addition to constituent data in a CTM transaction. In such a scenario, you can optionally create a component, similar to the Constituent Staging component, which an administrative user can use to review, update, and correct errors related to the staged *transaction-specific* data. The transaction staging component will complement the Constituent Staging component. Both must use the Temporary ID field (SCC_TEMP_ID) as high level key. The transaction staging component name you create and the menu navigation where you place it can be entered in the Transaction Setup component (in the Transaction Data Launch View group box). This will set a hyperlink on the Constituent Staging component allowing the user to easily navigate to the appropriate transaction staging component for the selected Temporary ID. To create your own transaction staging component and connect it with the delivered Constituent Staging component, we have delivered three subpages that can be inserted directly into the component you create in Application Designer.

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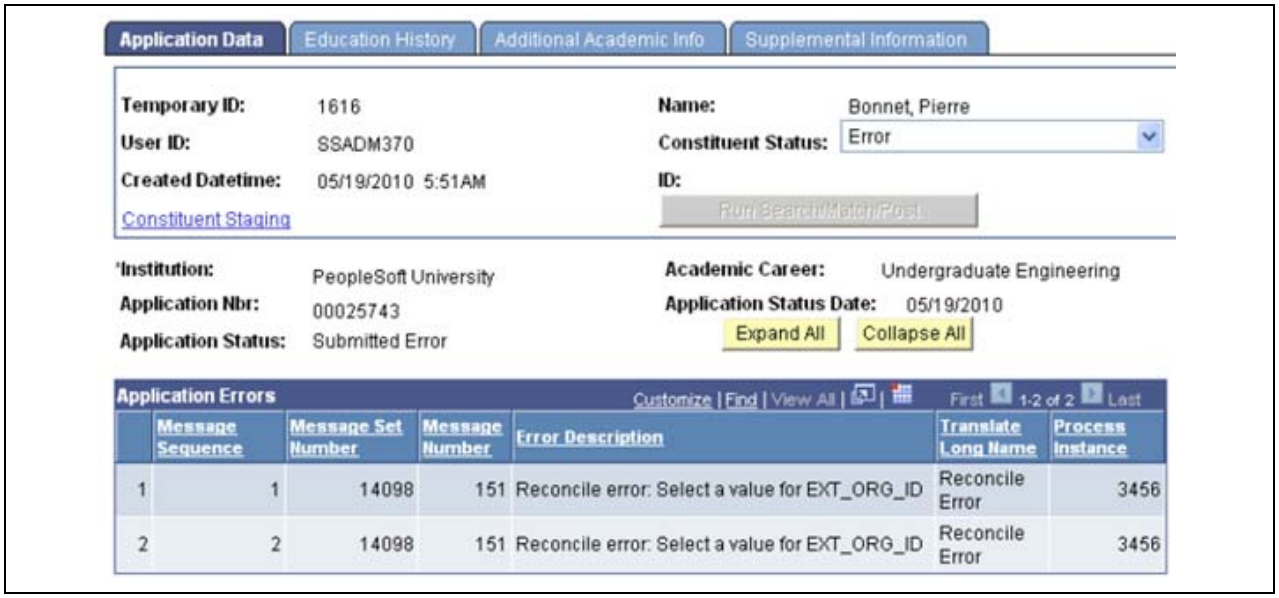
Note. Each functionality that consumes CTM will probably require its own transaction staging component to display the transaction data specific to the functionality. Creation considerations:

1. At the top of the first page of your transaction staging component, add the following three delivered subpages:

   a. SCC_STG_HEADER_SBP: Used inside any transaction staging components (that is, this subpage can be used for all transactions). Contains all the generic fields pertinent to a CTM transaction, for instance, Temporary ID, User ID, Name, Constituent Status, and so on. The subpage also contains the fields for manually processing the transaction. For instance, the Run Search/Match/Post, Post Transaction Data, and Set to Update ID buttons. Finally, it contains the logic to assure proper component behavior based on the Constituent Status and the Transaction Status. The following is an example of the SCC_STG_HEADER_SBP subpage when used in a transaction staging component:

Example of the SCC_STG_HEADER_SBP subpage

   b. SCC_MESSAGELOG_SBP: Contains the grid for the errors that are found when CTM processes the transaction. The following is an example of the SCC_MESSAGELOG_SBP subpage when used in a transaction staging component:



Example of the SCC_MESSAGELOG_SBP subpage

   c. SCC_TRANSAC_SBP: Contains the transaction generic information and offers the possibility to unpost a posted transaction. The following is an example of the SCC_TRANSAC_SBP subpage when used in a transaction staging component:

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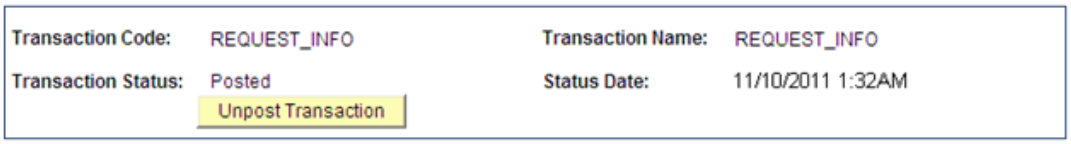

Example of the SCC_TRANSAC_SBP subpage

2. Below the subpages, add the fields that you had included in the transaction staging records. Based on the quantity of data to display, use as many tabs as you need. Each tab should include the SCC_STG_HEADER_SBP subpage as header.

3. Create the component search record to include the desired access security. Consider using a view that will return the Temporary IDs of only the transactions for which the component is built. For instance, your institution might be using CTM for AAWS admissions transaction as well as for a new CTM consumer. Because these two CTM consumers use different transaction staging records, you will be using two different transaction staging components. The search record for your new transaction staging component could limit the Temporary IDs that have rows in one or more staging records (staging records that you created for your new CTM consumer). This way, your users will not see the Temporary IDs that performed the AAWS transactions. Also, consider securing the search record. For instance, the delivered search record to access the Constituent Staging component does not restrict the returned Temporary IDs. However, the delivered search record to access the Application Transactions staging component (SAD_APPL_STG) limits the returned Temporary IDs based on Application Center security tied to the User ID that accesses the staging component. The Application Transactions staging component is delivered with AAWS.

4. Once you create the component, component PeopleCode must be added to have the logic contained in the three subpages working properly. To do so, a generic application class (SCC_SL_TRANSACTION:UTIL:StageReviewBase) is delivered. It contains properties and methods that process data, change user interface details of fields residing in the three sub-pages. The application class must be extended and methods in it should be overridden according to functional requirement.

   For example, to construct its transaction staging component (Application Transactions component), AAWS admission transaction uses the application class SAD_ADM_APPL:Components:SAD_APPL_STG. This application class extends the SCC_SL_TRANSACTION:UTIL:StageReviewBase application class. The StageReviewBase class contains Recruiting and Admissions specific logic.

Note. SCC_SL_TRANSACTION:UTIL:StageReviewBase contains a method called *constituentStatusChangeEvent().* This method is invoked every time the SCC_STG_STATUS property is changed. This method is intended to be overridden by the subclass to add transaction specific logic.

Note. The SCC_SL_TRANSACTION:UTIL:StageReviewBase contains the *SCC_RERUN_PUSH_BTN_FieldChange();* and *SCC_CONST_STS_UPD_FieldChange();* methods. These two methods should be defined in the subclass and invoked from component record field PeopleCode events of the records fields <component>.SCC_SL_DERIVED.SCC_RERUN_PUSH_BTN.FieldChange and <component>.SCC_SL_DERIVED.SCC_CONST_STS_UPD.FieldChange. This is necessary to ensure that the push buttons on the header subpage works. Explanation to various other methods and properties of StageReviewBase class is given inside the application class itself. These methods/properties may or may not be overridden based on functional requirements.

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Note. The SCC_SL_TRANSACTION:UTIL:StageReviewBase contains a method called *method processtrandtls* to populate the subpage SCC_TRANSAC_SBP. This method populates the fields of the subpage related to the transaction from the transaction staging record. This method should be called during the time of building transaction staging component and also every time the transaction staging record undergoes data changes during transaction processing.

Note. The SCC_SL_TRANSACTION:UTIL:StageReviewBase contains a method called SCC_TRANSTG_WRK_SCC_STS_UNPOST_Fieldchange. If you wish to provide the ability to unpost a transaction, extend this method in your Transaction App class with the required business logic/ business process to unpost a transaction. The delivered method SCC_TRANSTG_WRK_SCC_STS_UNPOST_Fieldchange would flip the transaction status field SCC_TRANS_STS of the staging record and set the value to "Submit". It would also appropriately change the values in UI as the status changes. To enable this, the method has to be invoked from the Fieldchange event of the SCC_STS_UNPOST field of your Transaction staging component PeopleCode.

5. Register the new component under the menu you choose and grant administrative users access to it.

Note. For an example of how this is done, use the Application Transactions staging component (Student Admissions, Application Transaction Mgmt, Application Transactions) delivered with AAWS and admission transactions functionality. This is the Application Transactions staging component:

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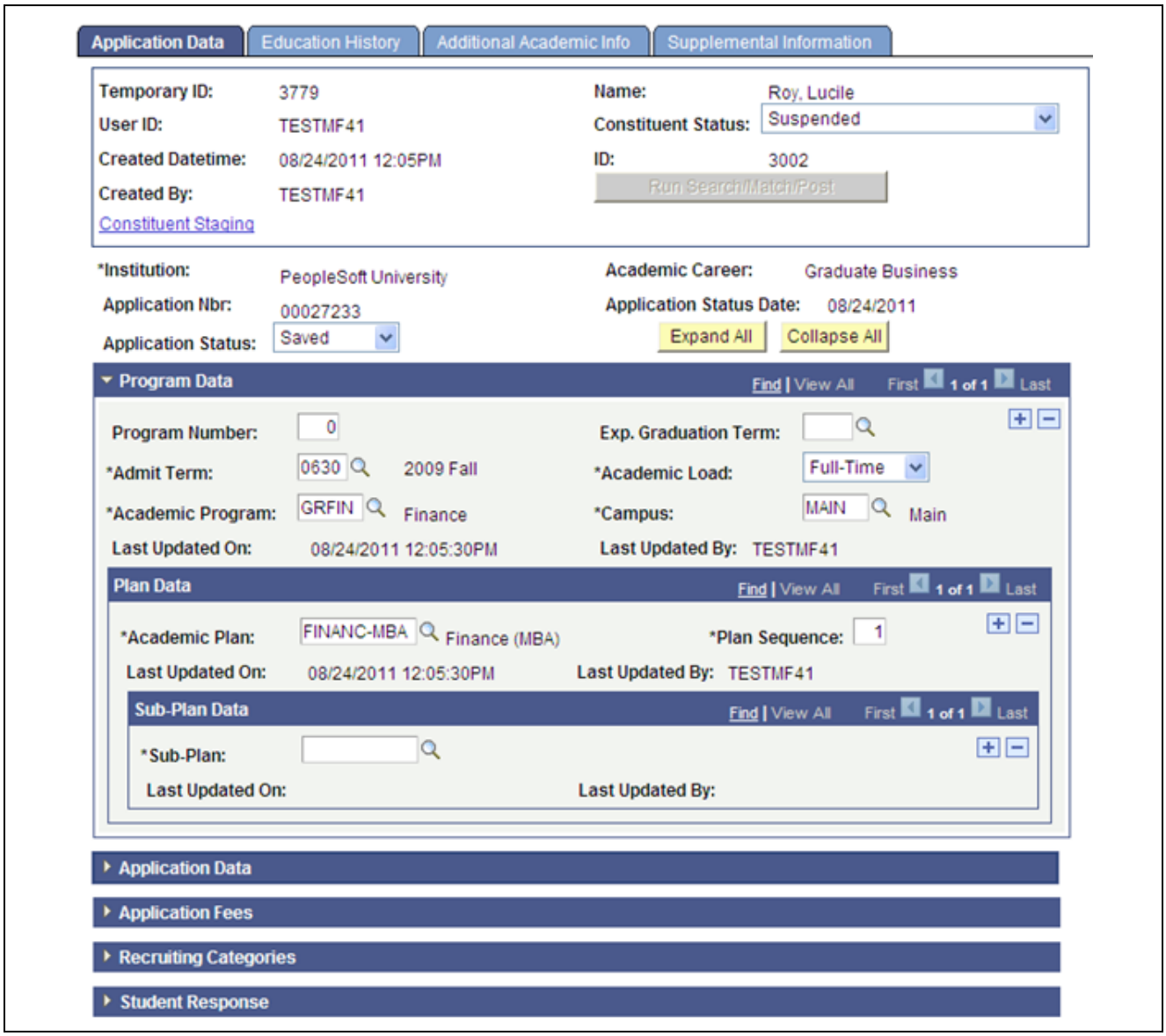

Example of a transaction staging component integrated with CTM

Note. In the above example, AAWS Application Transactions component only uses the described first two subpages. It does not use SCC_TRANSAC_SBP. Instead the transaction uses its own logic.

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, “Managing PeopleSoft Admission Transactions”, Reviewing and Editing Staged Admission Application Transactions.

Step 6: Setting Up Data Update Rules

See "Setting Up CTM", Defining Data Update Rules section of this chapter.

Step 7: Setting Up a Transaction

See: "Setting Up CTM", Setting Up a Transaction section of this chapter.

Setup considerations:

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1. The Transaction Handler application class handles the activities specific to the posting of the data for your new CTM transaction, for instance, data validation, posting, save, purge, to get related transactions and so on. The application class you specify here must extend the SCC_SL_TRANSACTION:INTFC:AbstractTransaction. Any method of this class can be overridden by the Transaction Handler class as per business requirements. The following is an example of a Transaction Handler application class code:

```
import SCC_SL_TRANSACTION:INTFC:AbstractTransaction;
class TransactionClass extends SCC_SL_TRANSACTION:INTFC:AbstractTransaction
   method TransactionClass ();

/* May override these methods as per business requirement */
   method validate(&p_tempConstituentID As number, &p_log As
  SCC_SL_TRANSACTION:INTFC:MessageLog out) Returns boolean;
   method post(&p_tempConstituentID As number, &p_EMPLID As string);
   method save(&p_tempConstituentID As number, &p_EMPLID As string);
   method getRelatedTransactions(&p_tempID As number, &p_transacCode As string)
  Returns array of SCC_SL_TRANSACTION:INTFC:RelatedTransaction;
   method purge(&p_arrTempConstituentID As array of number);

end-class;
method TransactionClass
   %Super = create SCC_SL_TRANSACTION:INTFC:AbstractTransaction();
end-method;
```

Note. For an example of a delivered Transaction Handler application class that extends the SCC_SL_TRANSACTION:INTFC:AbstractTransaction, look at the AAWS admission transaction delivered application class SCC_OLA.TRANSACTION.AdmissionTransaction.

---

2. The Staging Record Name is the staging record you created in *Step 1: Creating or Extending Staging Tables* subsection of this chapter. It is the parent staging record for your transaction.
3. While you can use different values, we recommend to set the Constituent Handler information as follows:
   - Root Package ID: SCC_SL_TRANSACTION
   - Path: INTFC
   - Application Class ID: DefaultConstituent
4. The Transaction Data Launch View should contain the location of where you applied the transaction staging component you created in step 5. Leave the values as blank if you decided not to provide a component to review the staged transaction-specific data.
5.

   Bundle 29
   Documentation-only update — no code change:
   This step has been added.
   When creating a CTM transaction that only involves constituent data (no transaction-specific data), consider setting up your transaction with the following Transaction Handler information:

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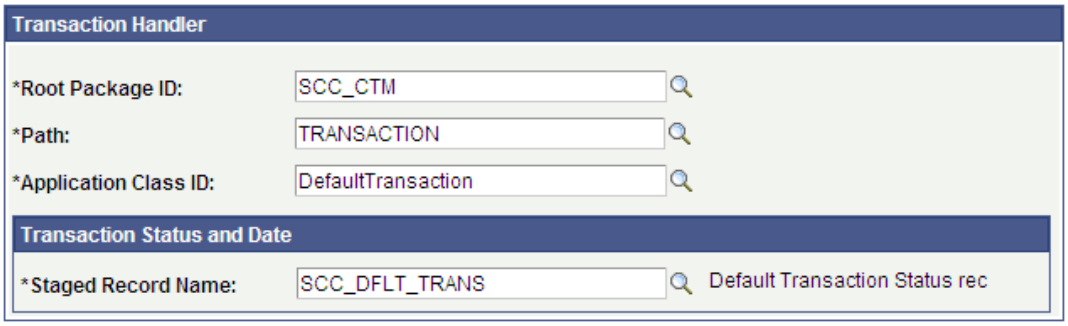

Example of Transaction Handler section on Transaction Setup page

A delivered example of a CTM transaction that does not involve any transaction data is *DELEGATED_ACCESS*. This CTM transaction can be used to gather constituent information about the third party (the proxy) who has been delegated access to a student data. In this case the transaction will only process constituent data, leaving all the transaction-specific data logic unused.

Note. For examples on how the Transaction Setup component is configured for the delivered AAWS admission transaction, refer to the screenshots in the "Setting Up CTM", *Setting Up a Transaction* section and "Setting Up CTM", *Defining the Search/Match Criteria* section of this chapter.

Step 8: Creating a User Interface (for online transactions only)

The user interface for your CTM online transaction can be created using PeopleTools language, or others. While we recommend using Oracle Application Development Framework (Oracle ADF) to develop an online transaction user interface, you can use any technology or tool that complies with PeopleTools Integration Broker.

Creation considerations:

1. Start by defining the data collection flow for your online user interface. This exercise will help you identify where the web services you created in one of the previous subsections gets invoked. For example, an online application user interface, may have the following data collection flow:

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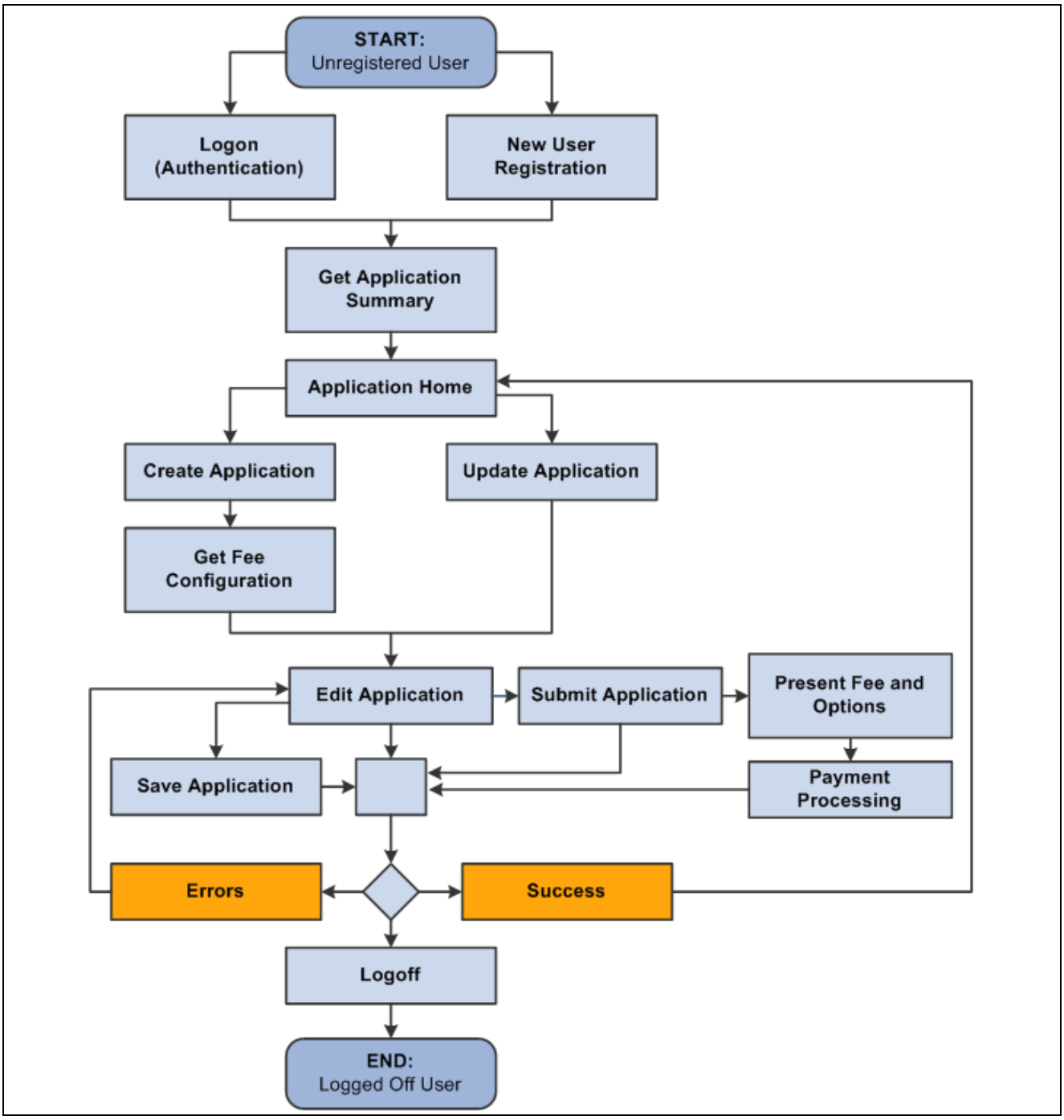

Example of a data collection flow for an Online Application

2. Because an online transaction requires authenticating the user, consider using the New User Registration framework to take advantage of all the Campus Solutions security objects delivered with the framework. Some self-service users may already have a username and a password to access your system (returning users) some don't (guest users). The New User Registration framework allows both users to authenticate to your system and once successfully authenticated, be transferred to the online self-service page used by your CTM transaction.

   See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Using New User Registration Framework", Developer Reference to Deploy New User Registration.

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3. Once the system has authenticated the user, it is also an appropriate time for the user interface to perform any initialization or setup to prepare the user for entry into the online transaction. Such setup may include requesting for a bulk list of values data that the user interface can subsequently display to the user. Performing this activity up front may result in a general performance improvement and improved user experience.

   See PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, “Setting Up List of Values"

A typical self service online transaction user interface might perform the following actions:

To allow a new user to register and a returning user to login:

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Using New User Registration Framework”

To initialize retrieval of list of values for specific fields:

- After authenticating the user, optionally formulate a bulk *List-Of-Values* request message.
- Submit the request message to the SCC_GET_LOV service operation.
- Store the *List-Of-Value* results in a temporary storage area for use throughout the online transaction functioning.

Refer to the third step related to list of values discussed in the Creation considerations topic of this subsection.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook,* “Setting Up List of Values"

To retrieve saved transactions:

If the online transaction allows the self-service user to save an incomplete transaction in order to come back later, create a page where you can display the incomplete transaction names so a user can select the proper transaction to complete. A get service will retrieve the saved data.

Step 9: Setting Up List of Values – Optional (for online transactions only)

Self-service user interfaces constructed using tools external to your PeopleSoft Campus Solutions database may contain data fields that have predefined or prompt values used to control and streamline data entry for a user. If you want to display these values that are set up inside your PeopleSoft Campus Solutions database, whether it is for a *prompt* field or a field that contains translate values, you can take advantage of the *List of Values* web service to do so. This delivered web service recognizes and provides the values that are used to populate drop-down list boxes on a user interface and for validating selections.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook,* “Setting Up List of Values"

Step 10: Setting Up New User Registration - Optional (for online transactions only)

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Using New User Registration Framework”, Developer Reference to Deploy New User Registration.

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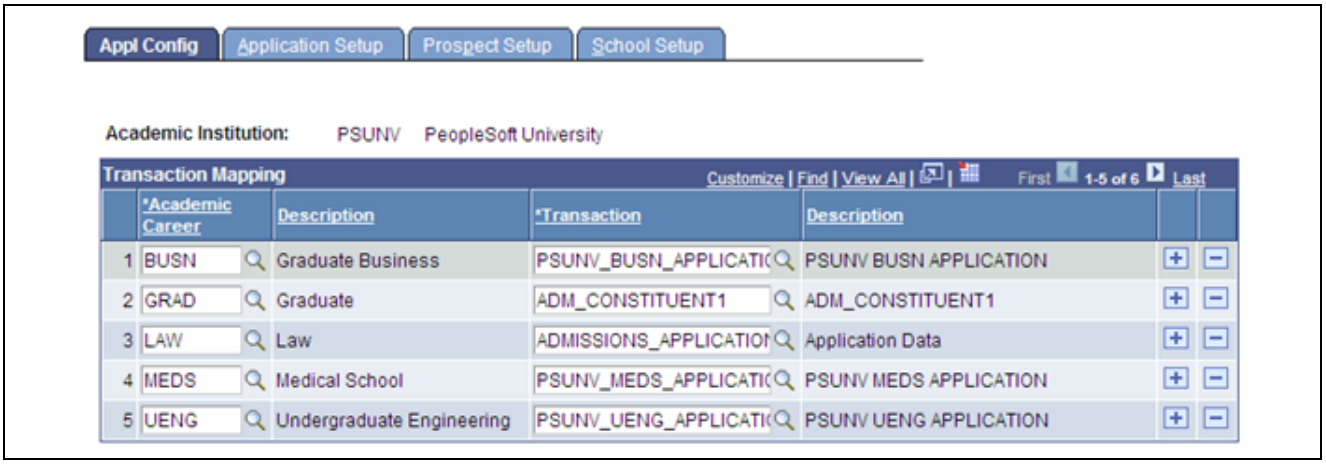
Step 11: Creating a Setup Component for a CTM Consumer– Optional (for online transactions only)

In the Transaction Setup component you create a Transaction Code and associate the data update rule value and the Search/Match parameters you want to use when the transaction is performed. Now, for your CTM consumer, depending on the values entered by a self-service user while performing the transaction, you may want to use different data update rules and Search/Match settings. For instance, the AAWS Online Application may allow online users to apply to an institution *PSUNV* and to an academic career *UGRD*. Now a different online user may apply to institution *ORACL* and to an academic career *GRAD*. Because the different institutions or the different academic careers business processes may differ, you may need to use different data update rule codes or different Search/Match parameters to process these two transactions. This is achieved by setting two different transaction codes and using a setup component that will interpret, based on the data entered by the self-service user, which transaction code to use. Notice that this is possible because the same staging records, production records, application classes and user interface are used to perform the two transactions. Only the values entered vary.

Therefore, depending on the nature of the CTM consumer you are creating, you may, like for AAWS Online Application, need to create multiple transaction codes for the same transaction. You do so if you want to use a specific data update rule code or Search/Match parameters based on the values entered by the self-service user while performing the transaction. A setup component for the CTM consumer will therefore need to be created to identify what fields and values should define which Transaction Code to use. The transaction codes will use the same staging and production records, the same application classes, the same entities, and the same staging component. Only the data update rule or the Search/Match parameters (defined for the Transaction Code) could be different based on the data entered by the self-service user.

An example of a setup component for a CTM consumer is delivered with the AAWS admission transaction: *Application Configuration* component (SAD_ADM_APL_CONFIG). Typical to admissions, their business processes function differently from one institution to another and from one academic career to another. While the staging and the production tables are the same, the behavior to update them and to process the transaction varies depending on the institution and the academic career values entered by the self-service user.

The following shows the extended transaction setup component delivered with the AAWS admissions online application transaction. To access this component, select Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, Application Configuration.



Example of an extended transaction setup component – Application Configuration component

When a self-service user or an administrator uses the institution-created user interface to perform an online transaction, logic should be in place inside the user interface to interrogate the extended transaction setup component to determine which Transaction Code to use based on the values entered by the user.

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For example, a transaction code *PSUNV_UGRD_EXAMPLE* is created with a data update rule value *DO_NOT_UPDATE_RULE* and a second transaction code *ORACL_GRAD_EXAMPLE* with a different data update rule value *DEFAULT_UPDATE_RULE*. The extended transaction setup component should specify that for institution *PSUNV* and academic career *UGRD*, the transaction code to use is *PSUNV_UGRD_EXAMPLE*. And for institution *ORACL* and academic career *GRAD* to use transaction code *ORACL_GRAD_EXAMPLE*.

Note. The Application Configuration component supports only AAWS.

Step 12: Setting Up File Parser (for offline or batch transactions only)

You must set up File Parser for offline transactions.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, “Using the File Parser Process”

See "Setting Up CTM", File Parser and CTM section of this chapter.

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