Setting Up Evaluation Management

Understanding Evaluation Management

The Evaluation Management System feature is not tied to a singular module within Campus Solutions (for example, Application Evaluations); it is intended to create a *generic* evaluation solution which can be leveraged across Campus Solutions, including people, organizations, and departments or faculties.

The feature is flexible enough that it can support many different models of an evaluation review. It provides institutions with the ability to determine what will be evaluated (for example, Admissions Application), who will evaluate it (such as evaluators and committees), and the ability to determine and configure the business process for the evaluation itself. The feature builds on the existing Campus Community committee structures and provides an administrative evaluation structure where the evaluation process can be managed. Evaluation Management also provides the ability for institutions to have a multiple-stage or -level review process, by supporting a hierarchical committee structure that can determine the order in which the evaluation (for example, thesis and application) should be considered and reviewed. In addition to supporting committee structures, the feature also supports evaluations where the process is undertaken by an individual.

As noted, the Evaluation Management System is not tied to a singular module within Campus Solutions, yet there is the need to relate the evaluation functionally as part of business processes. In order to make evaluations as 'generic' as possible, we have introduced the concept of cross reference records that are associated with an Evaluation Category. These cross reference records contain the data keys relevant to functional data in the system and enable the system to connect an evaluation to that data. We are delivering three cross-reference records initially: SCC_GE_XRF_APPL, SCC_GE_XRF_THES and SCC_GE_XRF_DEMO. SCC_GE_XRF_APPL and SCC_GE_XRF_THES support Admissions and Research Management Thesis functionality. SCC_GE_XRF_DEMO is a placeholder/example and can be cloned to create new cross-reference records. Similarly, in order to display appropriate data key fields used in the evaluation category in the evaluation administrative component, we have delivered two subpages that handle this display. SCC_GE_XRF_KEYSSBP contains subpages for Campus Solutions delivered cross reference records. SCC_GE_XRF_EXT_SBP is a placeholder/example. If you want to extend the Evaluation Management System beyond the functionality delivered initially for Admissions and Thesis, you must create a cross reference record and subpage. The new subpage should be added to the SCC_GE_XRF_EXT_SBP subpage. When adding a subpage for the first time, delete the Scroll Area and Evaluation Instance field in SCC_GE_XRF_EXT_SBP (they were delivered as placeholders). By using the SCC_GE_XRF_EXT_SBP subpage, you should be able to avoid any impacts if Campus Solutions redelivers the component.

Related Links

Managing Evaluations
Processing Evaluations in Batch
Sending Timeout and Reminder Notifications to Evaluators
Understanding Evaluation WorkCenter
Prerequisites for using Evaluation WorkCenter

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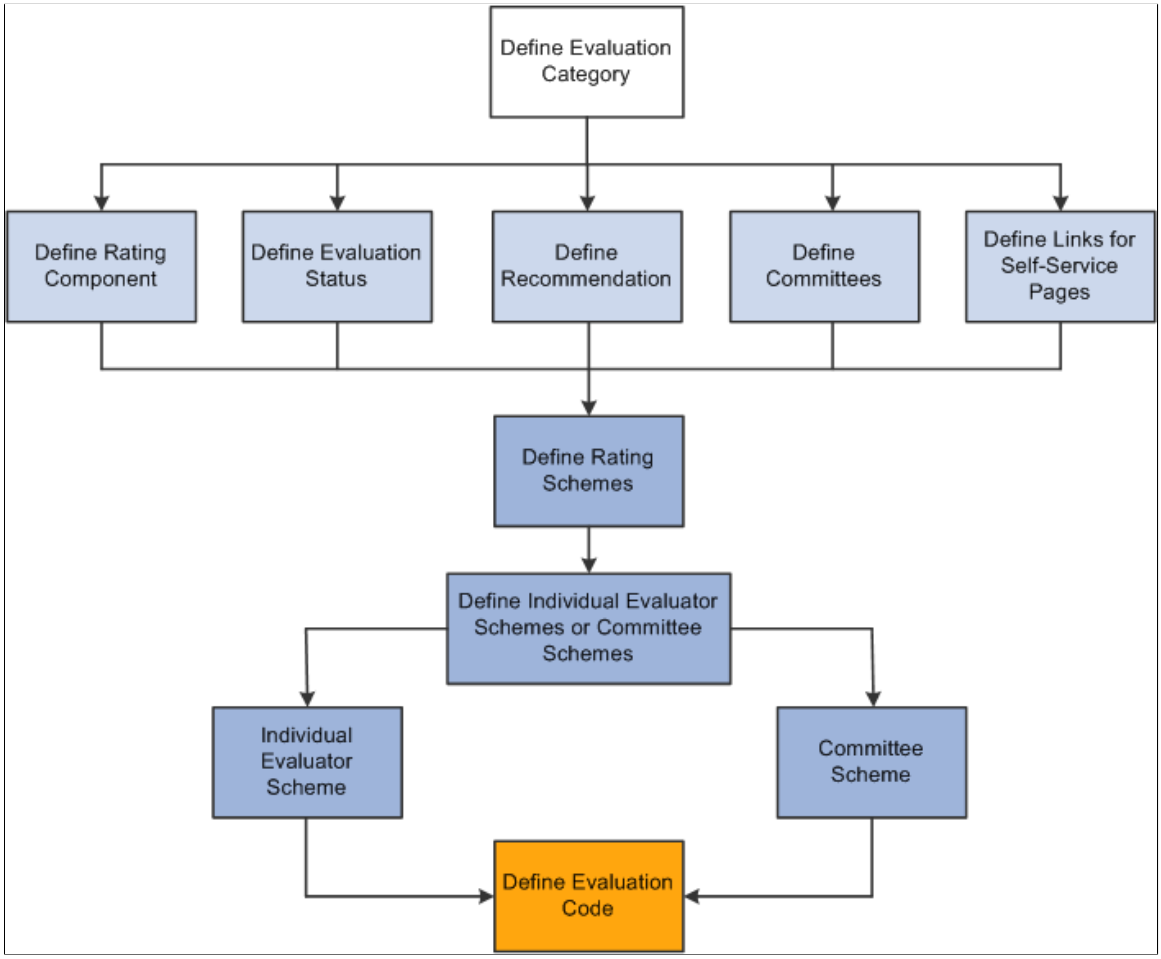
Using Self-Service Worklist
Entering Evaluations

Understanding Evaluation Management Setup

Before you can start to use Evaluation Management System, you need to complete setup of various components. It is beneficial to map out your plan for the evaluation and make some decisions on the evaluation purpose, who is being evaluated, what is being evaluated, and who will be performing the evaluation.

Image: Evaluation Management System Setup

The following diagram shows the building blocks of Evaluation Management System setup and how each step builds into the next:



Defining Evaluation Categories

This section discusses how to set up evaluation categories.

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Page Used to Define Evaluation Categories

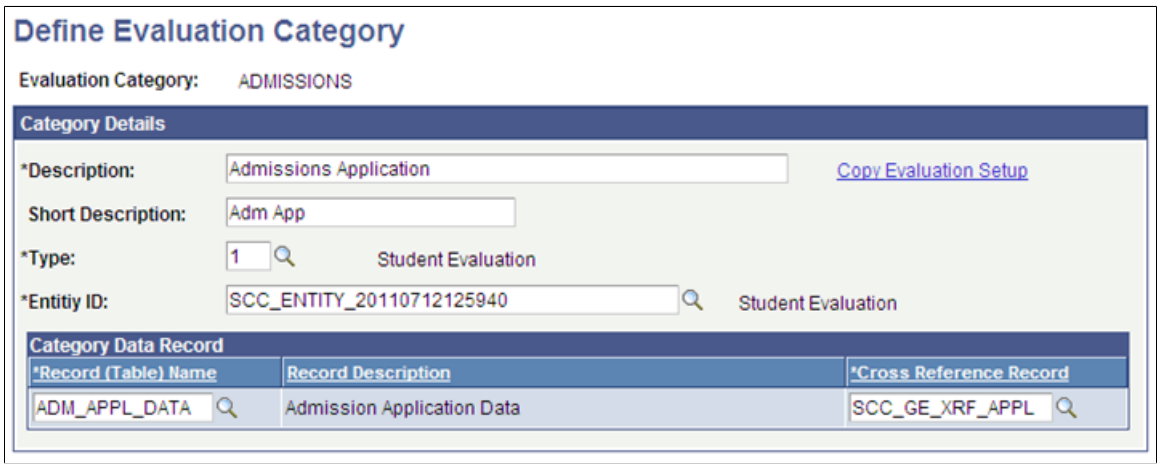
Page Name	*Definition Name*	*Navigation*	*Usage*
Define Evaluation Category	SCC_GE_CATEGORY	Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Category	Specify what the category data record will be, which means defining which keys the system will use to track and link the evaluation to other Campus Solutions functionality.

Setting Up Evaluation Categories

Access the Define Evaluation Category page (Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Category).

Image: Define Evaluation Category page

This example illustrates the fields and controls on the Define Evaluation Category page.



An evaluation category is the high-level parent record to all other definition tables in the setup of an evaluation.

Evaluation category usage is very flexible; your institution can use a category at either a very high or very granular level. For example, an institution can define one Admissions category at a very high level, to serve all admission offices on the campus. Alternately, the institution can create very granular definitions such as Liberal Arts Undergraduate Application, School of Arts Undergraduate Application, and Chemistry Department Graduate Application.

PeopleSoft delivers two evaluation categories, for admissions and thesis management.

Copy Evaluation Setup Click this link to access the Copy Evaluation Setup page using this evaluation category as the ‘copy from’ category.

Type This value is always *1*, and is tied to the Entity ID.

Entity ID Values for this field reside on the Entity Registry Table. The value you select here determines which entity structure the

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system uses for all evaluations under this category. The entity structure contains the Cross Reference Record listed below.

Record (Table) Name

The value you enter here determines which record in the system contains the data keys and is most relevant to the functional evaluation process.

Cross Reference Record

The value you enter here connects the data keys on the data record selected in the Record (Table) Name field to an Evaluation Instance Number. This allows a discrete set of data to be tied to a specific evaluation instance. Over time an individual may have several of the same evaluation codes assigned to them, but associated with different data from one record; the Cross Reference Record maintains the link.

Cross references for applications are tied to application numbers; cross references for theses are tied to candidate numbers and thesis submission numbers.

Copying Evaluation Setup

This section discusses how to copy setup scenarios.

Page Used to Copy Evaluation Setup

Page Name	*Definition Name*	*Navigation*	*Usage*
Copy Evaluation Setup	SCC_GE_CATGRY_COPY	Set Up SACR, Common Definitions, Evaluation Management System, Copy Evaluation Setup	Create redundant setup scenarios for some evaluation constructs.

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Copy Setup Scenarios

Access the Copy Evaluation Setup page (Set Up SACR, Common Definitions, Evaluation Management System, Copy Evaluation Setup).

Image: Copy Evaluation Setup page (1 of 4)

This example illustrates the fields and controls on the Copy Evaluation Setup page (1 of 4). You can find definitions for the fields and controls later on this page.

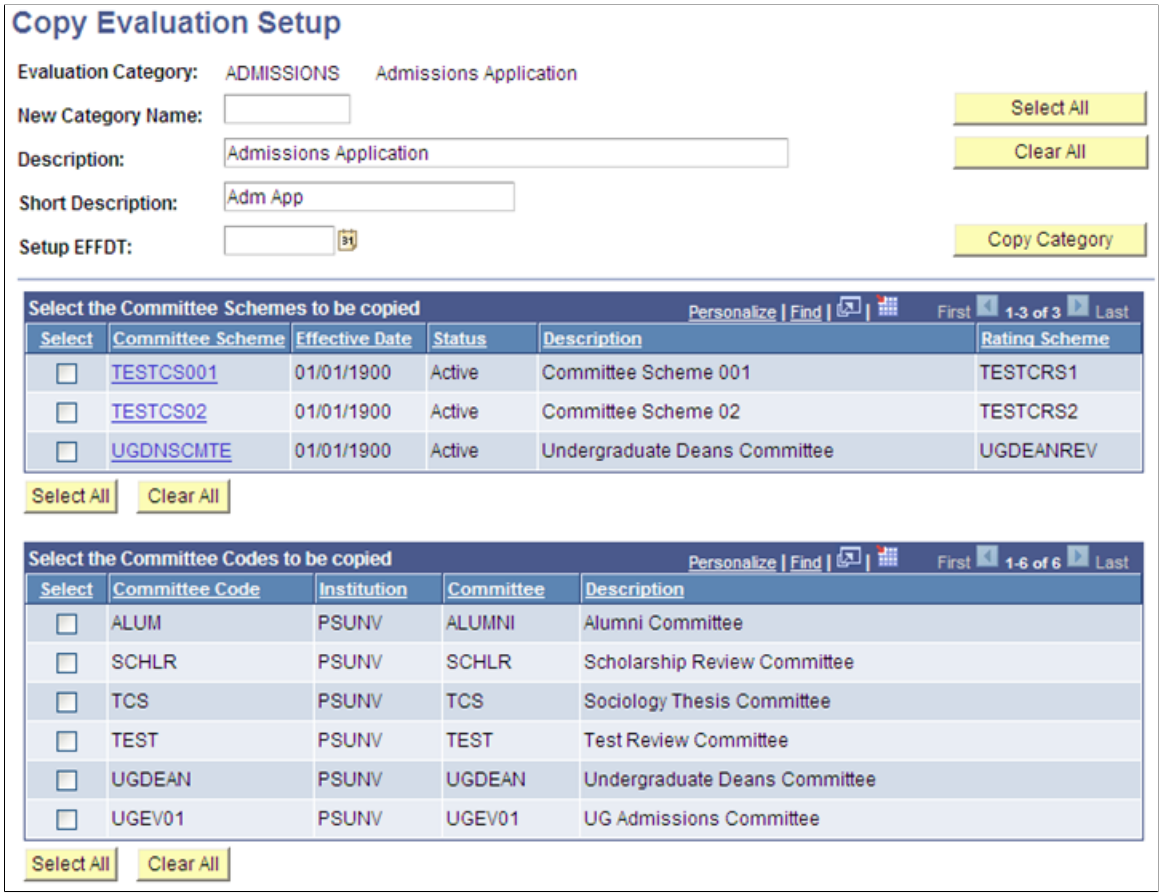

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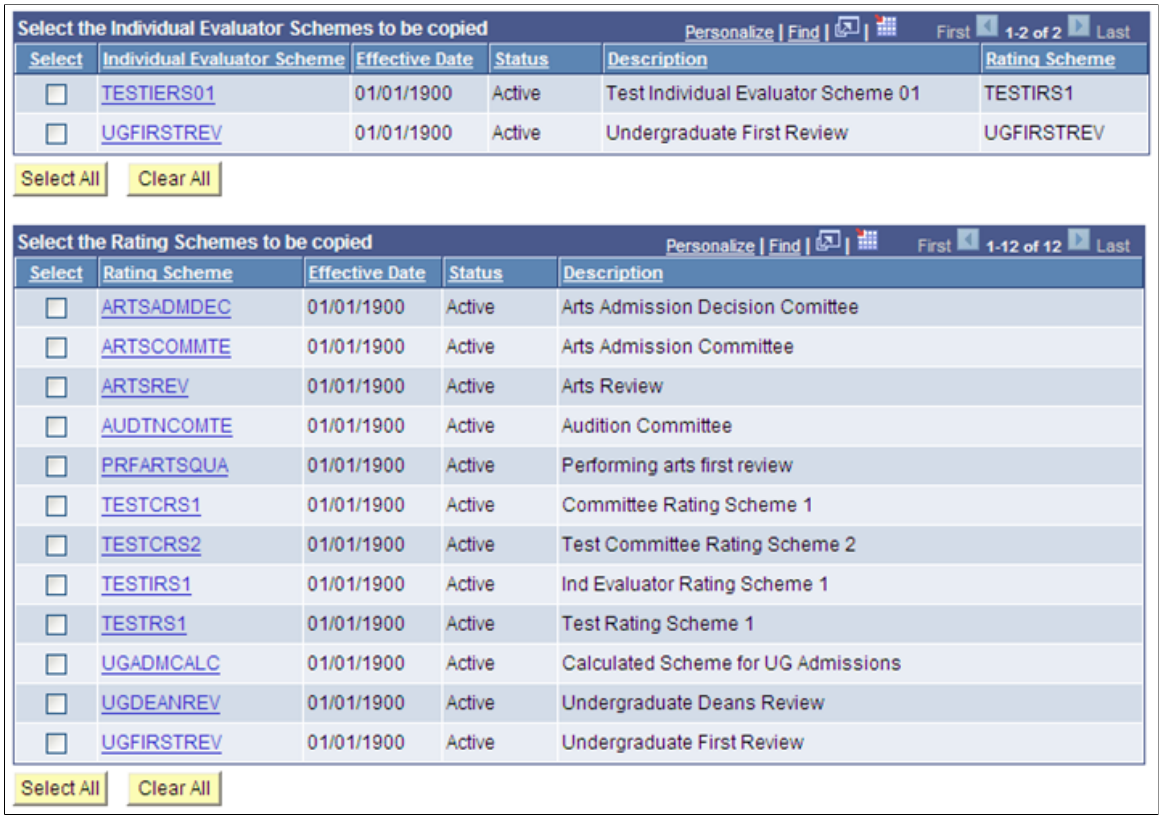
Image: Copy Evaluation Setup page (2 of 4)

This example illustrates the fields and controls on the Copy Evaluation Setup page (2 of 4). You can find definitions for the fields and controls later on this page.



Select the Individual Evaluator Schemes to be copied — Personalize | Find | First 1-2 of 2 Last

Select	Individual Evaluator Scheme	Effective Date	Status	Description	Rating Scheme
☐	TESTIERS01	01/01/1900	Active	Test Individual Evaluator Scheme 01	TESTIRS1
☐	UGFIRSTREV	01/01/1900	Active	Undergraduate First Review	UGFIRSTREV

Select All Clear All

Select the Rating Schemes to be copied — Personalize | Find | First 1-12 of 12 Last

Select	Rating Scheme	Effective Date	Status	Description
☐	ARTSADMDEC	01/01/1900	Active	Arts Admission Decision Comittee
☐	ARTSCOMMTE	01/01/1900	Active	Arts Admission Committee
☐	ARTSREV	01/01/1900	Active	Arts Review
☐	AUDTNCOMTE	01/01/1900	Active	Audition Committee
☐	PRFARTSQUA	01/01/1900	Active	Performing arts first review
☐	TESTCRS1	01/01/1900	Active	Committee Rating Scheme 1
☐	TESTCRS2	01/01/1900	Active	Test Committee Rating Scheme 2
☐	TESTIRS1	01/01/1900	Active	Ind Evaluator Rating Scheme 1
☐	TESTRS1	01/01/1900	Active	Test Rating Scheme 1
☐	UGADMCALC	01/01/1900	Active	Calculated Scheme for UG Admissions
☐	UGDEANREV	01/01/1900	Active	Undergraduate Deans Review
☐	UGFIRSTREV	01/01/1900	Active	Undergraduate First Review

Select All Clear All

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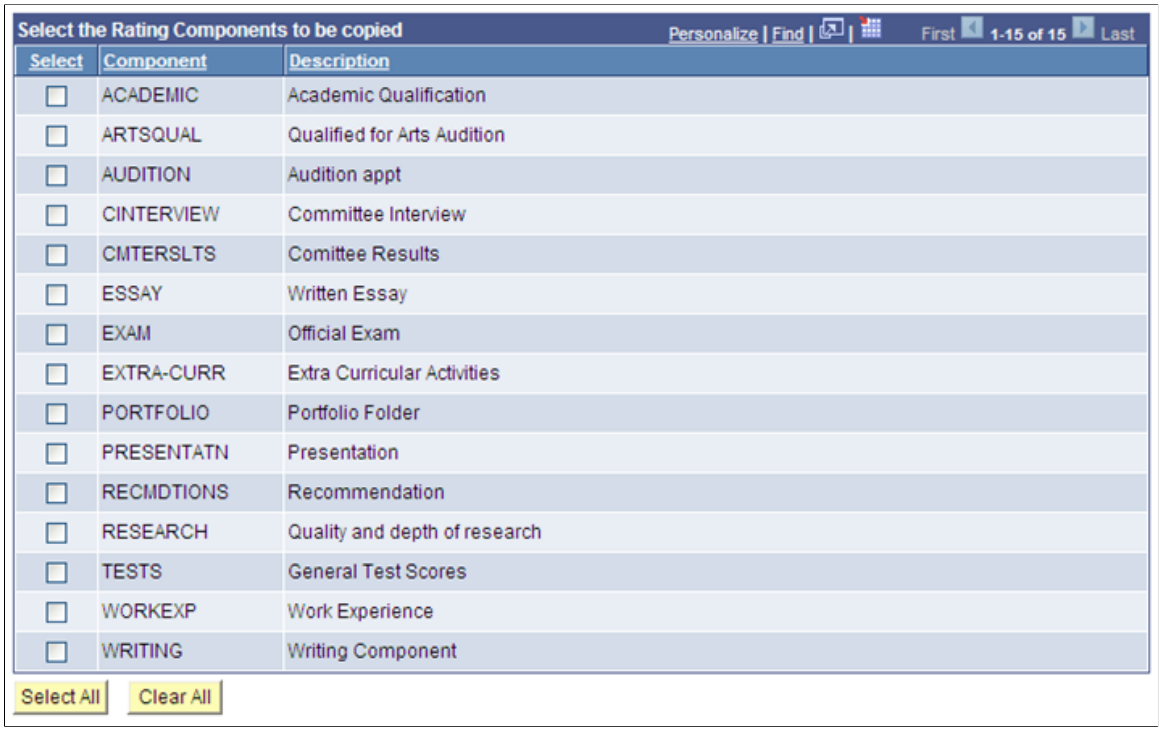
Image: Copy Evaluation Setup page (3 of 4)

This example illustrates the fields and controls on the Copy Evaluation Setup page (3 of 4). You can find definitions for the fields and controls later on this page.



Select the Rating Components to be copied — Personalize | Find | First 1-15 of 15 Last

Select	Component	Description
☐	ACADEMIC	Academic Qualification
☐	ARTSQUAL	Qualified for Arts Audition
☐	AUDITION	Audition appt
☐	CINTERVIEW	Committee Interview
☐	CMTERSLTS	Comittee Results
☐	ESSAY	Written Essay
☐	EXAM	Official Exam
☐	EXTRA-CURR	Extra Curricular Activities
☐	PORTFOLIO	Portfolio Folder
☐	PRESENTATN	Presentation
☐	RECMDTIONS	Recommendation
☐	RESEARCH	Quality and depth of research
☐	TESTS	General Test Scores
☐	WORKEXP	Work Experience
☐	WRITING	Writing Component

Select All Clear All

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Image: Copy Evaluation Setup page (4 of 4)

This example illustrates the fields and controls on the Copy Evaluation Setup page (4 of 4). You can find definitions for the fields and controls later on this page

Select the Statuses to be copied — Personalize | Find | First 1-7 of 7 Last

Select	Evaluation Status	Effective Date	Status	Description	In Progress
☐	ADMIT	01/01/1900	Active	ADMIT	☐
☐	ASSIGN	01/01/1900	Active	Assigned to Student	☑
☐	CMPLTD	01/01/1900	Active	Evaluation Completed	☐
☐	FINAL	01/01/1900	Active	Final Status	☐
☐	INPROG	01/01/1900	Active	In Progress	☑
☐	NDINFO	01/01/1900	Active	Waiting for more information	☑
☐	WTCMTE	01/01/1900	Active	Waiting for Committee	☑

Select All | Clear All

Select the Recommendation Values to be copied — Personalize | Find | First 1-11 of 11 Last

Select	Recommendation	Effective Date	Status	Description
☐	ADMIT	01/01/1900	Active	ADMIT
☐	APPROV	01/01/1900	Active	Approve - Final
☐	DCLINE	01/01/1900	Active	Decline - no invitation for audition
☐	DENY	01/01/1900	Active	Denied - Final
☐	FAIL	01/01/1900	Active	Failed
☐	HOLD2R	01/01/1900	Active	Hold for 2nd review
☐	INVITE	01/01/1900	Active	Invite candidate for audition
☐	NONE	01/01/1900	Active	No Recommendation
☐	PASS	01/01/1900	Active	Passed
☐	PASSWR	01/01/1900	Active	Pass with restrictions
☐	WAITLIST	01/01/1900	Active	Wait List

Select All | Clear All

Copy Category

Since evaluation setup is keyed by Evaluation Category, for very granular evaluation constructs, your institution may need to create somewhat redundant setup scenarios under each category in the Evaluation Status, Recommendation, and Rating Components tables. For example, while a granular setup may exist for Thesis Review so that there are discreet categories by Academic Department that sponsor research candidates and will administer the thesis review process, there is commonality in the terms, nomenclature used in a thesis review, and among those setup tables which in fact could be shared. The copy functions on this page aid in reducing redundant data entry.

The system displays all setup associated with the category selected on the search page. In addition, the system displays all setup under the “copy from” Evaluation Category: committee schemes, committee codes, individual evaluator schemes, rating scheme, and values for evaluation status, recommendation, and rating components.

The fields on this page give you flexibility in the approach taken in copying over setup. If you want the identical setup under a new evaluation category, click the Select All and Copy buttons. However, if you want only some of the setup elements, you can choose which to copy over.

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If you select one or more schemes, the system automatically selects the elements that are part of the selected scheme(s). If you deselect one of the elements, the system confirms that those elements will not be copied over.

There are Select All and Clear All buttons associated with each group box to assist with data selection. As you make each selection, the system automatically selects other associated setup elements that are used in a scheme.

Select the Committee Schemes to be Copied

This group box displays all committee schemes associated with the evaluation category. You can select all schemes or any combination of them. Click the Committee Scheme name link to review its properties on the Committee Scheme setup page. Selecting a committee scheme programmatically selects its downstream setup elements.

Select the Committee Codes to be Copied

This group box displays all committee codes associated with the evaluation category. You can select all codes or any combination of them. Some codes may already be selected because of the selected Committee Scheme in the previous group box.

Select the Individual Evaluator Schemes to be Copied

This group box displays all individual evaluator schemes associated with the evaluation category. You can select all codes or any combination of them. Click the Individual Evaluator Scheme name link to review its properties on the Individual Evaluator Scheme setup page. Selecting an individual evaluator scheme causes the system to automatically select other associated setup elements that are used in a scheme.

Select the Rating Schemes to be Copied

This group box displays all rating schemes associated with the evaluation category. You can select all codes or any combination of them. Click the Rating Scheme name link to review its properties on the Rating Scheme setup page. Selecting a rating scheme causes the system to automatically select the rating components that are used in the selected scheme.

Select the Rating Components to be Copied

Select values in this group box to copy them to the new evaluation category setup. If you previously selected a scheme, some values in this grid may already be selected. You can deselect those values; however, when you click Copy, the system generates messages advising that some values will not be copied.

Select the Statuses to be Copied

Select values in this group box to copy them to the new evaluation category setup.

Select the Recommendation Values to be Copied

Select values in this group box to copy them to the new evaluation category setup. If you previously selected a scheme, some values in this grid may already be selected. You can deselect those values; however, when you click Copy, the system generates messages advising that some values will not be copied.

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Defining Evaluation Statuses

This section discusses how to set up evaluation status.

Page Used to Define Evaluation Statuses

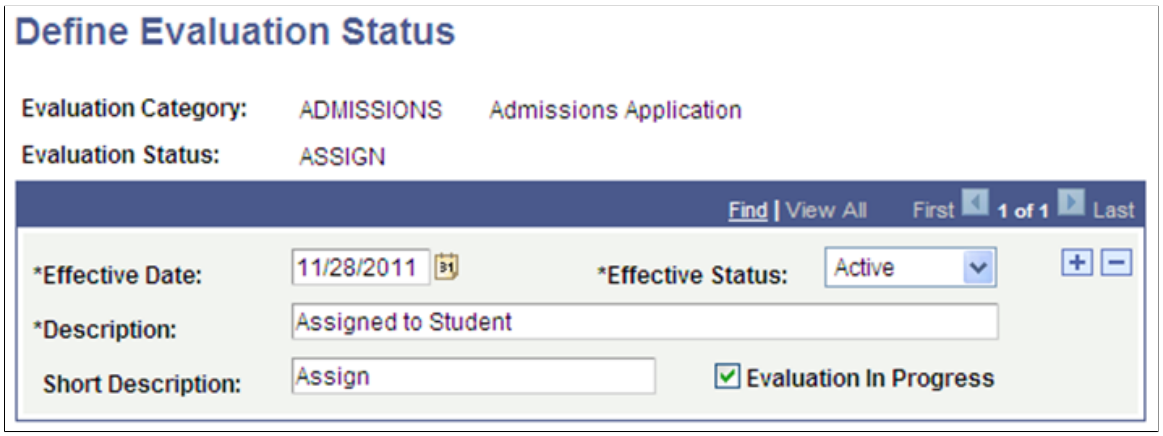
Page Name	*Definition Name*	*Navigation*	*Usage*
Define Evaluation Status	SCC_GE_STAT_CD	Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Status	Set up evaluation statuses.

Setting Up Evaluation Status

Access the Define Evaluation Status page (Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Status).

Image: Define Evaluation Status page

This example illustrates the fields and controls on the Define Evaluation Status page. You can find definitions for the fields and controls later on this page



Evaluation status setup is keyed by evaluation category.

Evaluation in Progress Select this check box to indicate the evaluation is in progress; the system then directs whether changes to an evaluation can occur once it is underway.

Defining Recommendations

This section discusses how to set up evaluation recommendations.

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Page Used to Define Recommendations

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Recommendation	SCC_GE_RECMD_CD	Set Up SACR, Common Definitions, Evaluation Management System, Define Recommendation	Define evaluation recommendations.

Setting Up Evaluation Recommendations

Access the Define Recommendation page (Set Up SACR, Common Definitions, Evaluation Management System, Define Recommendation).

Image: Define Recommendation page

This example illustrates the fields and controls on the Define Recommendation page.

Recommendation setup is keyed by evaluation category.

Defining Rating Components

This section discusses how to set up rating components.

Page Used to Define Rating Components

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Rating Component	SCC_GE_COMP_DEF	Set Up SACR, Common Definitions, Evaluation Management System, Define Rating Component	Define a criterion used during evaluation management.

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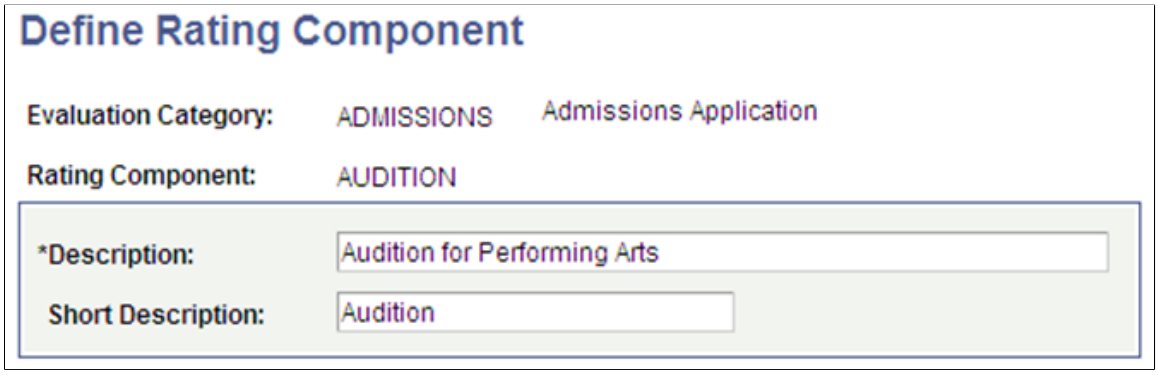
Setting Up Rating Components

Access the Define Rating Component page (Set Up SACR, Common Definitions, Evaluation Management System, Define Rating Component).

Image: Define Rating Component page

This example illustrates the fields and controls on the Define Rating Component page. You can find definitions for the fields and controls later on this page.



A Rating Component identifies a criterion that an evaluator should assess as part of the evaluation.

Defining Committees for Evaluation Management

The following table lists the tasks that you must perform to define committees.

Task	*Page*	*Navigation*	*Notes*
Setting Up Committee Types and Roles	Committee Type/Role	Campus Community, Committees, Committee Type/ Role	The committee roles that you define in this Campus Community page are displayed on the Define Committee Scheme page of evaluation management.
Creating a Committee	Committee	Campus Community, Committees, Manage Committees, Committee	The committees that you define in this Campus Community page are available for selection in the Define Committees page of evaluation management.
Assigning Committee Members	Committee Members	Campus Community, Committees, Manage Committees, Committee Members	This page provides details for each member of a committee.

Refer to the following references for more information on these three pages:

See:

- Understanding Committee Templates

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- Creating Committees

Defining Rating Schemes

This section discusses how to set up evaluation rating schemes.

Page Used to Define Rating Schemes

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Rating Scheme	SCC_GE_RTNG_SCHEME	Set Up SACR, Common Definitions, Evaluation Management System, Define Rating Scheme	Define options for how a rating scheme is used during calculated evaluations, and individual and committee evaluations.

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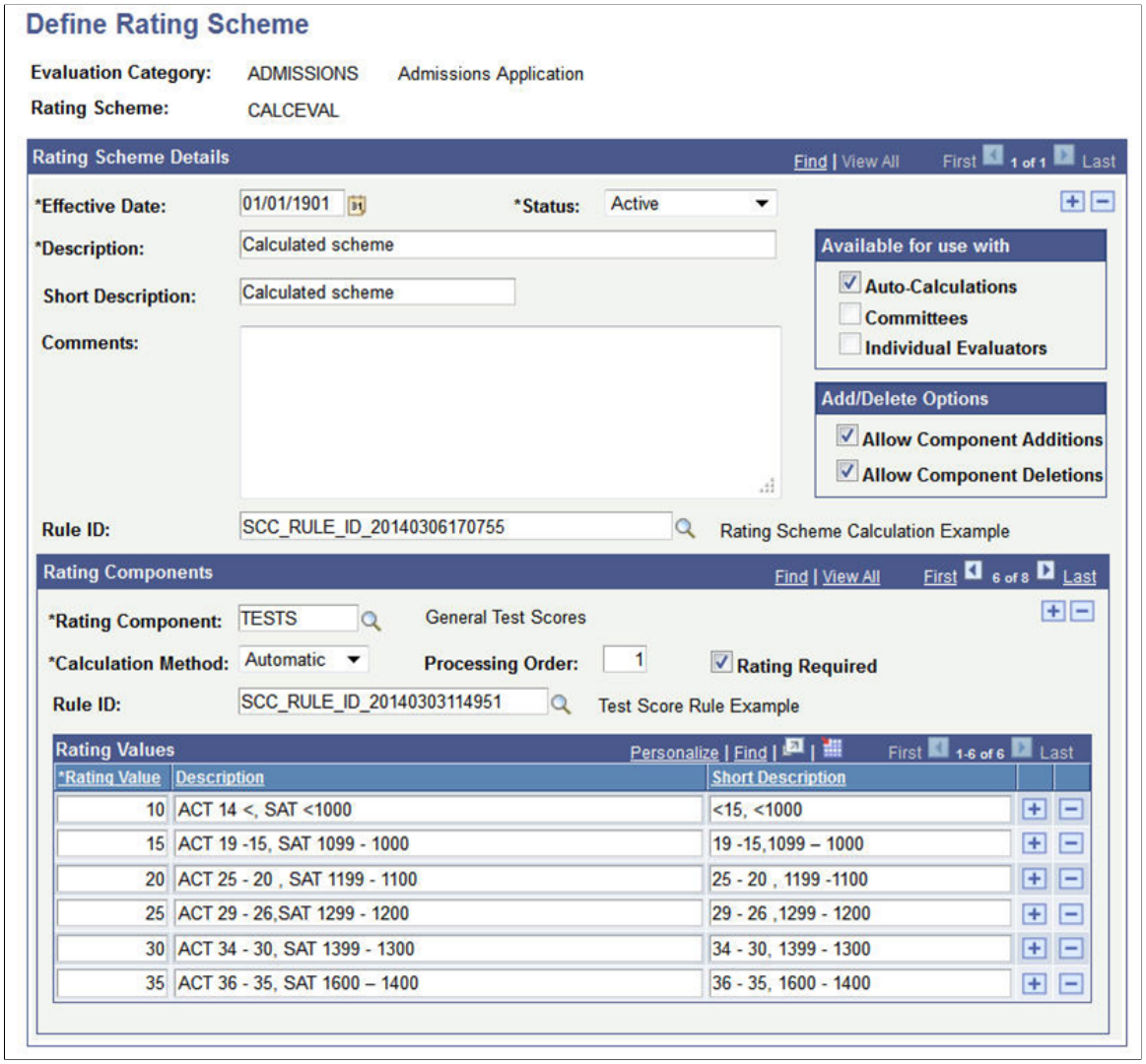
Setting Up Evaluation Rating Schemes

Access the Define Rating Scheme page (Set Up SACR, Common Definitions, Evaluation Management System, Define Rating Scheme).

Image: Define Rating Scheme page

This example illustrates the fields and controls on the Define Rating Scheme page. You can find definitions for the fields and controls later on this page.



Available for use with

The options in this group box determine how a rating scheme can be used, whether by a *Committees* scheme, *Individual Evaluators* scheme, or by a scheme that uses *Auto-Calculations*. These settings control the values available for the Rating Scheme fields of the Committee Scheme and Individual Evaluator setup and the Rating Scheme field on the Evaluation Code setup. Committee Scheme and Individual Evaluator may be used concurrently. If you select *Auto-Calculations*, the other two options are unavailable. When you select Auto-Calculations, two Rule ID fields become available on the page: one at the scheme level and one for each rating component.

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Note: A rating scheme marked as Auto-Calculations cannot also be used as an Individual Evaluator scheme or Committee scheme.

See Setting Up and Using Rules for the Evaluation Management System

Add/Delete Options

Allow Component Deletion

This option controls behavior on the Manage Evaluation component.

Select this option to allow the system or a user to delete components under this scheme from an ID's evaluation record if the status for that scheme is not *Final*.

Allow Component Addition

This option controls behavior on the Manage Evaluation component.

Select this option to allow the system or a user to add components under this scheme to a specific ID's evaluation record if the status for that scheme is not *Final*.

The system prompts against valid designated rating scheme values.

Rule ID

This field becomes available in the Rating Scheme Details group box when the rating scheme is marked for Auto-Calculations. This field is optional. When populated, the system will use this rule to calculate the Overall Rating value for the scheme. If no rule is designated for a rating component, then the system will calculate the Overall Rating using an average of the rating component values.

This field prompts from the values in the Rules Engine tables.

Rating Components

The fields in this group box define what evaluators can change or modify during the evaluation process.

Rating Component

Rating components roll up under the rating scheme. Rating components are defined on the Define Rating Component page.

Calculation Method

This field has no impact in the system.

Processing Order

This value is used by the system when the *Auto-Calculations* option is selected. Components that use Rules will be evaluated according to the Processing Order.

Rating Required

Select this check box to determine whether, on the Manage Evaluation component, this component rating must be completed by the evaluator or by an auto-calculation. If selected, the evaluation cannot be marked final unless this rating is populated.

Rule ID

This field becomes available when the rating scheme is marked for Auto-Calculations. This field is optional. When populated,

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the system will use this rule to calculate the rating value for the component. If no rule is designated for a rating component, it is assumed that the rating value will be populated manually.

This field prompts from the values in the Rules Engine tables.

Rating Value

This is a numerical field used to define a rating or scoring standard for the component being assessed. How rating values are used in an evaluation will differ when the rating scheme is marked as used for Auto-Calculations versus for Individual Evaluator or Committee schemes. When used for Auto-Calculations, if a Rule ID is present, then values populated here are used for descriptive purposes on the transaction pages in the Manage Evaluation component and in the Evaluation Center self-service pages. However, the actual rating standard or scale will be taken from the associated rule identified for the rating component. If no Rule ID is identified, at the transaction level, the rating field value will prompt against this setup for valid values for the corresponding rating component. Leave this field blank if no actual numerical rating range is required.

For each rating value, the Description and Short Description fields enable you to provide text explanation.

Defining Evaluation Committees

This section discusses how to link existing committees to evaluation committees.

Page Used to Define Committees

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Committees	SCC_GE_COMM_DEF	Set Up SACR, Common Definitions, Evaluation Management System, Define Committees	Link Campus Community committee setup to Evaluation Management.

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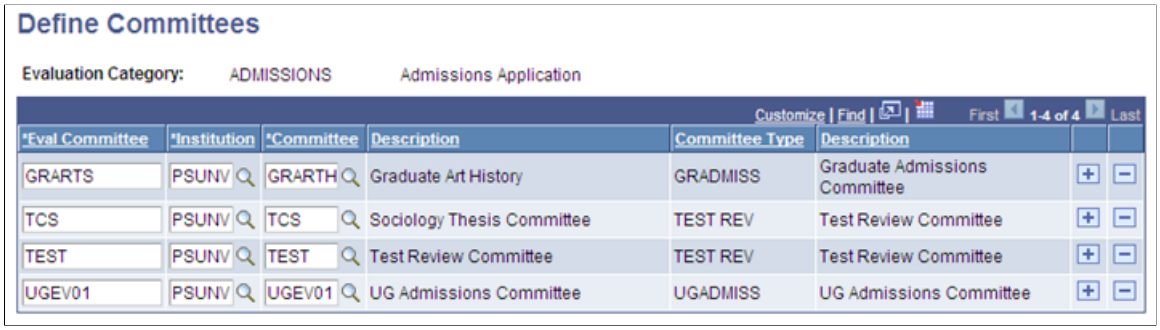
Linking Existing Committees to Evaluation Committees

Access the Define Committees page (Set Up SACR, Common Definitions, Evaluation Management System, Define Committees).

Image: Define Committees page

This example illustrates the fields and controls on the Define Committees page. You can find definitions for the fields and controls later on this page.



As noted in the section “Defining Committees for Evaluation Management”, Evaluation Management System (EMS) uses the existing Campus Community Committee setup. However, because those structures are keyed by institution, use this page to link the Campus Community Committee setup to an EMS Evaluation Committee. The Eval Committee values you set up here are used on the Define Committee Scheme page.

Related Links

Defining Committees for Evaluation Management

Defining Links for Self-Service Pages

This section discusses how to define links for self-service pages.

Page Used to Define Links

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Link	SCC_GE_LINK_DEF	Set Up SACR, Common Definitions, Evaluation Management System, Define Link	Define valid links for individual evaluator and committee schemes, and evaluation codes under a specific evaluation category

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Setting Up Links

Access the Define Link page (Set Up SACR, Common Definitions, Evaluation Management System, Define Link).

Image: Define Link page for BI Publisher Report

This example illustrates the fields and controls on the Define Link page (for link type of BI Publisher Report). You can find definitions for the fields and controls later on this page.

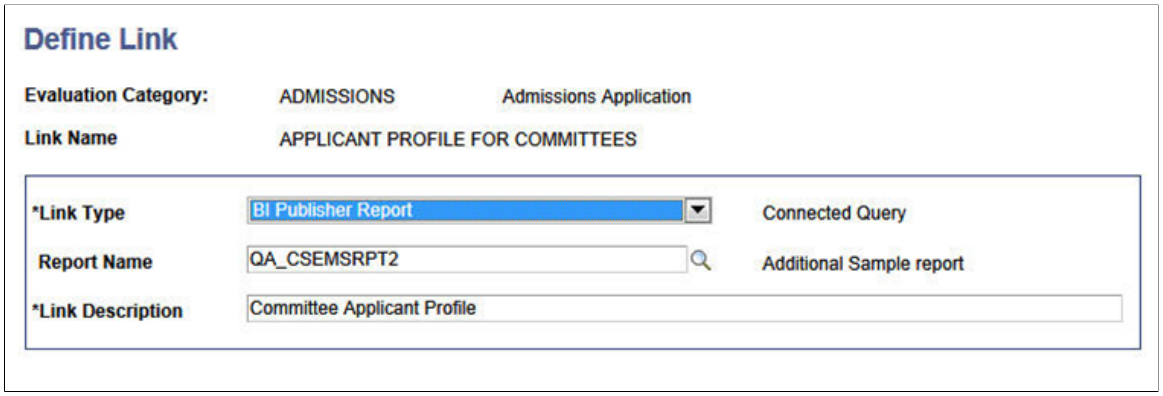
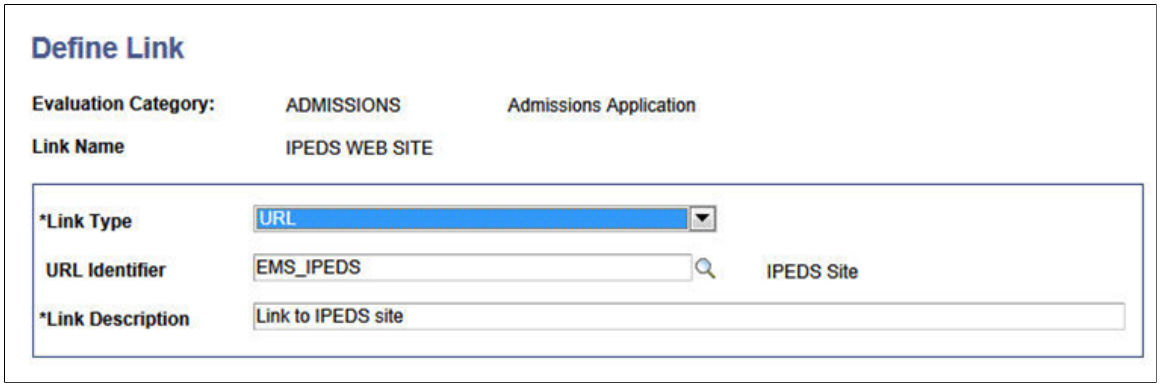


Image: Define Link page for URL

This example illustrates the fields and controls on the Define Link page (for link type of URL). You can find definitions for the fields and controls later on this page.



Link setup is keyed by Evaluation Category

Link Type Two link types are delivered: *BI Publisher Report* and *URL*. Behavior of the remaining fields on the page will change based upon the link type that you select.

Report Name This field is available when you select *BI Publisher Report* as the link type. This field prompts against the BI Publisher Report Definition table (Reporting Tools, BI Publisher, Report Definition, Definition).

URL Identifier This field is available when you select *URL* as the link type. This field prompts from the URLs defined in the URL Maintenance page (PeopleTools, Utilities, Administration, URLs).

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Link Description The description defaults in from either the BI Publisher Report definition or the URL definition. You can change this default description.

For information on BI Publisher for PeopleSoft:

See product documentation for *PeopleTools: BI Publisher for PeopleSoft*

For information on URL Maintenance page:

See product documentation for *PeopleTools: System and Server Administration*, "Using Administration Utilities"

Defining Committee Schemes

This section discusses how to align committees with schemes.

Pages Used to Define Committee Schemes

Page Name	*Definition Name*	*Navigation*	*Usage*
Scheme Details	SCC_GE_COMM_SCHEME	Set Up SACR, Common Definitions, Evaluation Management System, Define Committee Scheme, Scheme Details	Define which committees are part of the committee scheme, what will be evaluated by the committees as indicated by the rating scheme value, a routing order if there are multiple committees, and valid recommendation values.

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Page Name	Definition Name	Navigation	Usage
Self-Service Options	SCC_GE_CMSC_SS_OPT	Set Up SACR, Common Definitions, Evaluation Management System, Define Committee Scheme, Self-Service Options	Configure options for deployment of the Additional Links section, Evaluation Overview page and Committee Collaboration page to the self-service pages in the Evaluation Center for committee members in the scheme. Options include: Additional Links for BI Publisher Reports which will contain data relevant to the evaluation and links to instructional content for conducting the evaluation, access to an Evaluation Overview page which gives more visibility to the activity in the evaluation and access to a Committee Collaboration page which gives visibility of activity in that committee. The settings here may work in conjunction with the Self-Service Options setting at the Evaluation Code level.

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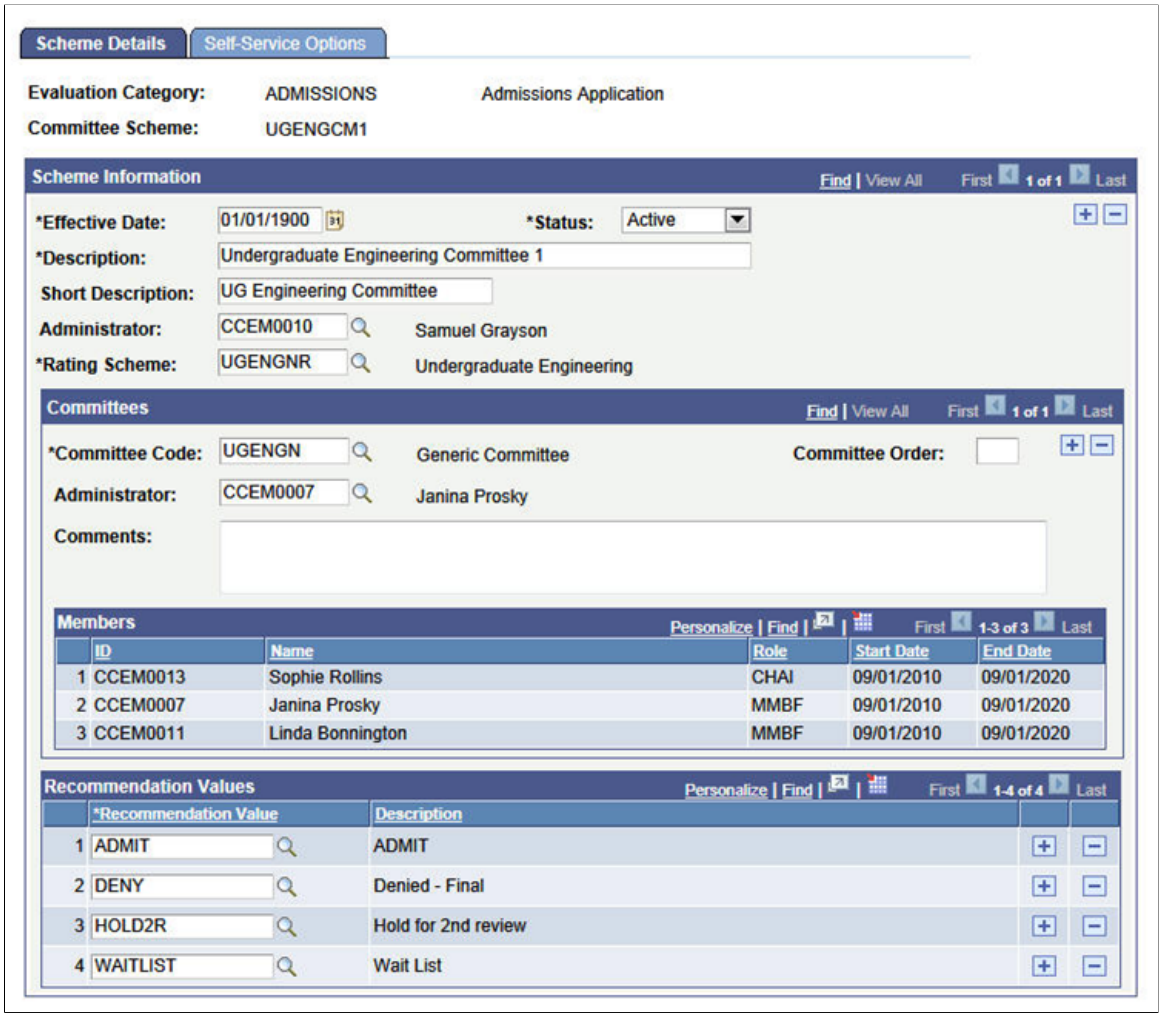
Aligning Committees With Schemes

Access the Scheme Details page (Set Up SACR, Common Definitions, Evaluation Management System, Define Committee Scheme, Scheme Details page).

Image: Scheme Details page

This example illustrates the fields and controls on the Scheme Details page. You can find definitions for the fields and controls later on this page.



You can set up multiple committees under a single committee scheme, all of which will evaluate using the same criteria.

Scheme Information

Administrator

Select an administrator for the scheme level. This administrator is responsible for entering recommendation and status for the scheme in the Manage Evaluation component or the Evaluation Decision Entry self-service page.

If you leave this field blank, you can select an administrator in the Evaluation Schemes setup page where you assign the scheme to an evaluation code.

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See Setting Up Evaluation Codes.

Rating Scheme

Enter a value to designate what the committees under this scheme will be evaluating. Rating Schemes are defined on the Define Rating Scheme page, where the Evaluation Category is the same for this committee scheme.

Committees

Committee Code

Enter one or more committees that you want to assign to this scheme. Committees are defined on the Define Evaluation Committee page.

Committee Order

Enter a value here to establish the order in which the workflow should process the various committees.

Workflow is the internal logic of EMS that determines the order in which evaluations should be added to the self-service worklist component of the evaluators and administrators. Workflow may also send an email notification at that time depending on the evaluation code setup.

You can also define the workflow order among evaluators of an individual evaluator scheme in the Define Individual Evaluator Scheme page. Additionally, when you assign the committee schemes and/or individual evaluator schemes to an evaluation code during evaluation code setup, the workflow order among schemes can be defined. At this time, you can have the workflow not send the email notification but worklist addition is always done by the workflow according to the order.

See:

- Defining Individual Evaluator Schemes
- Setting Up Evaluation Codes

For information on the worklist, refer to “Using Self-Service Worklist” topic in Campus Community - Evaluation WorkCenter documentation.

For an example of how the EMS workflow processes the evaluators and administrators for an evaluation, refer to “Entering Evaluations” topic in Campus Community - Evaluation WorkCenter documentation.

Administrator

Select an administrator for the committee level. This administrator is responsible for entering recommendation and status for the committee in the Manage Evaluation component or the Evaluation Decision Entry self-service page.

Members

Members listed here are populated from the Manage Committees component within Campus Community. If there are no committee members defined at that level, you cannot

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add them here. However, you can add members manually on the Manage Evaluation component or in bulk through the batch process.

Recommendation Values

Recommendation Value

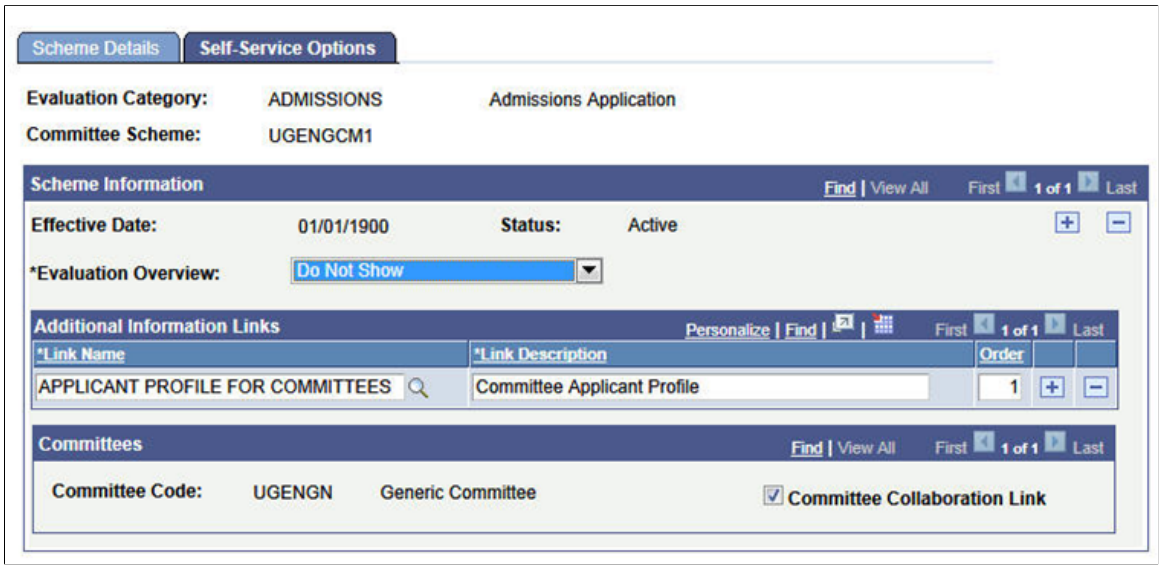
Enter all recommendation values that are applicable to this evaluation. The values apply to all committees that are part of the scheme. Recommendation values are defined on the Define Recommendation page.

Setting Up Self-Service Options

Access the Self-Service Options page (Set Up SACR, Common Definitions, Evaluation Management System, Define Committee Scheme, Self-Service Options).

Image: Self-Service Options page

This example illustrates the fields and controls on the Self-Service Options page. You can find definitions for the fields and controls later on this page.



Evaluation Overview

The value for this field determines the access a committee member may have to the Evaluation Overview page. The setting that you select here applies to all committee members in the scheme. Three values are delivered: *Show All*, *Do Not Show*, and *Show Completed*.

- Select *Show All* to display to the committee members all levels and activity in the evaluation, uncompleted or completed.
- Select *Do Not Show* if committee members should not have view access to other levels and activity in the evaluation.

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- Select *Show Completed* to display to the committee members all levels and activity in the evaluation which are completed and have the default value of *Final*.

Additional Information Links

Use this group box to enter all the links that should be made available to the participants in this scheme. Links values are defined in the Define Links component. Adding a Link Name here defaults in the Link Description but you can change this description here, if for this scheme, another descriptive named is desired.

Link display may also be controlled by setup at the Evaluation Code level. If links populated there are *not* set as Administrator Only, then they will appear to the scheme participants. If a link is indicated at the Code level and repeated at the scheme level, then the repeated link will be filtered out so it will not appear twice. In that instance, the description from the Evaluation Code level will display. You may give an order to how you would like the links to display on the self-service page. If the same links are provided at the Evaluation Code level, then that level takes priority in terms of the display on the self-service page. In other words, Evaluation Code links will display as numbered, then the scheme links will display in the order indicated here, after the Code links

See Campus Community - Evaluation WorkCenter documentation for examples of how the Additional Information section appears on the self-service pages.

Committees

Committee Code Display-only field; the value defaults from the committee scheme setup.

Committee Collaboration Link Select to display the committee collaboration link on the Committee Member self-service entry page.

Defining Individual Evaluator Schemes

This section discusses how to assign individuals to evaluator schemes.

Pages Used to Define Individual Evaluator Schemes

Page Name	*Definition Name*	*Navigation*	*Usage*
Scheme Details	SCC_GE_IE_SCHEME	Set Up SACR, Common Definitions, Evaluation Management System, Define Individual Evaluator Scheme, Scheme Details	Define which individuals are part of this scheme, what will be evaluated by the evaluator as indicated by the rating scheme value, a routing order if there are multiple evaluators, and valid recommendation values.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Self-Service Options	SCC_GE_IESC_SS_OPT	Set Up SACR, Common Definitions, Evaluation Management System, Define Individual Evaluator Scheme, Self-Service Options	Configure options for deployment of the Additional Links section and Evaluation Overview page to the self-service pages in the Evaluation Center for evaluators in the scheme. Options include: Additional Links for BI Publisher Reports which will contain data relevant to the evaluation and links to instructional content for conducting the evaluation, and access to an Evaluation Overview page which gives more visibility to the activity in the evaluation. The settings on this page may be used in conjunction with the Self-Service Options setting at the Evaluation Code level.

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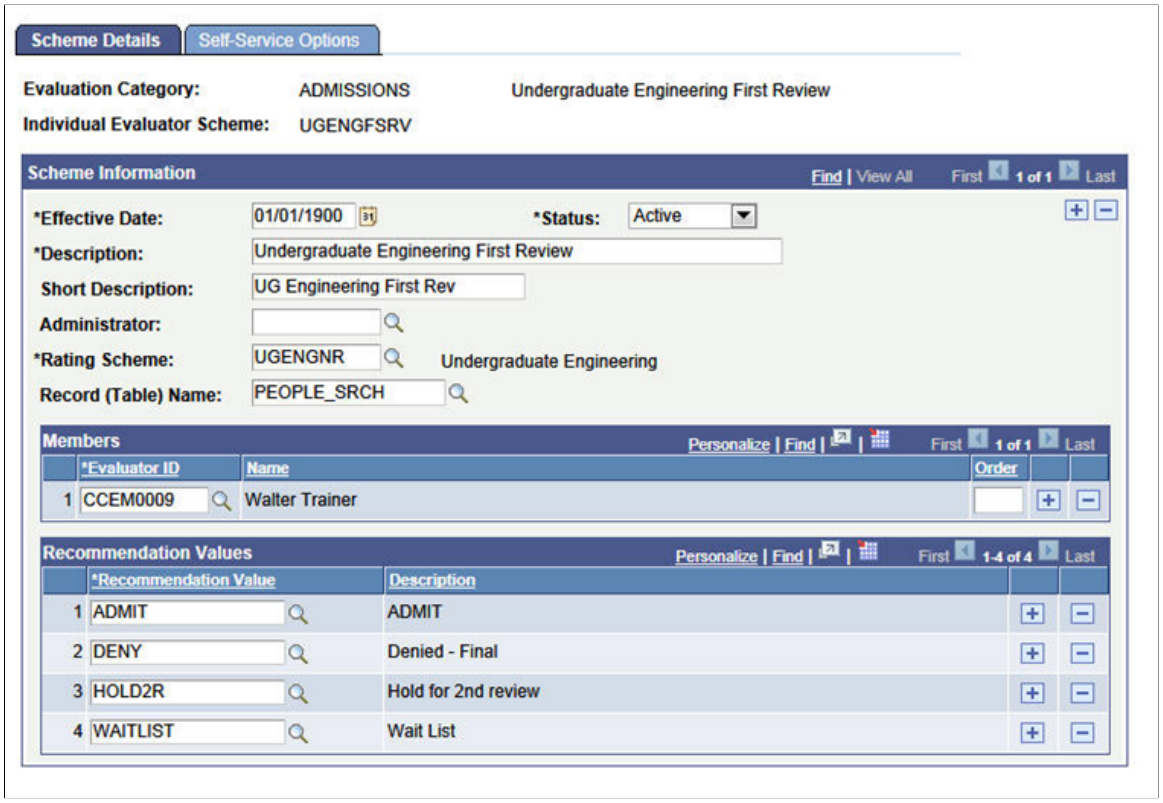
Assigning Individuals to Evaluator Schemes

Access the Scheme Details page ((Set Up SACR, Common Definitions, Evaluation Management System, Define Individual Evaluator Scheme, Scheme Details).

Image: Scheme Details page

This example illustrates the fields and controls on the Scheme Details page. You can find definitions for the fields and controls later on this page.



The individual evaluator scheme allows for an individual to act as an evaluator without having to be part of a committee. Evaluators can be indicated here, but can also be added on the administrative component.

Administrator

Select an administrator who is responsible for entering recommendation and status for the scheme in the Manage Evaluation component or the Evaluation Decision Entry self-service page.

If you leave this field blank, you can select an administrator in the Evaluation Schemes setup page where you assign the scheme to an evaluation code.

See Setting Up Evaluation Codes.

Rating Scheme

Enter a value to designate what the evaluators under this scheme will be evaluating. Rating Schemes are defined on the Define Rating Scheme page, where the Evaluation Category is the same for this scheme.

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Evaluator Prompt Table

Select the prompt table or view from which you want to assign evaluators to this scheme (evaluators are assigned to the scheme using the Evaluator ID field on this page).

This prompt table defines a group of specific IDs from which evaluators can be assigned. For example, if you are using the Research Tracking feature, you may want to assign evaluators from a group of thesis evaluators. Use PeopleSoft Application Designer to create a prompt table.

If you want to assign evaluators from any ID in the system regardless of their status (such as students, staff, recruiters, prospects, alumni and so on), select *PEOPLE_SRCH* as the evaluator prompt table.

Evaluator ID

Enter the ID of each person you want to assign to this scheme.

The prompt values depend on the prompt table that you selected in the Evaluator Prompt Table field.

Order

Enter a value here to establish the order in which the workflow processes various individual evaluators. If you do not impose any order, all evaluators work in parallel.

For information about workflow, refer to the Committee Order field description in the preceding Defining Committee Schemes section.

See Defining Committee Schemes.

Recommendation Value

Enter all recommendation values that are applicable to this evaluation. The values apply to all individuals that are part of the scheme. Recommendation values are defined on the Define Recommendation page.

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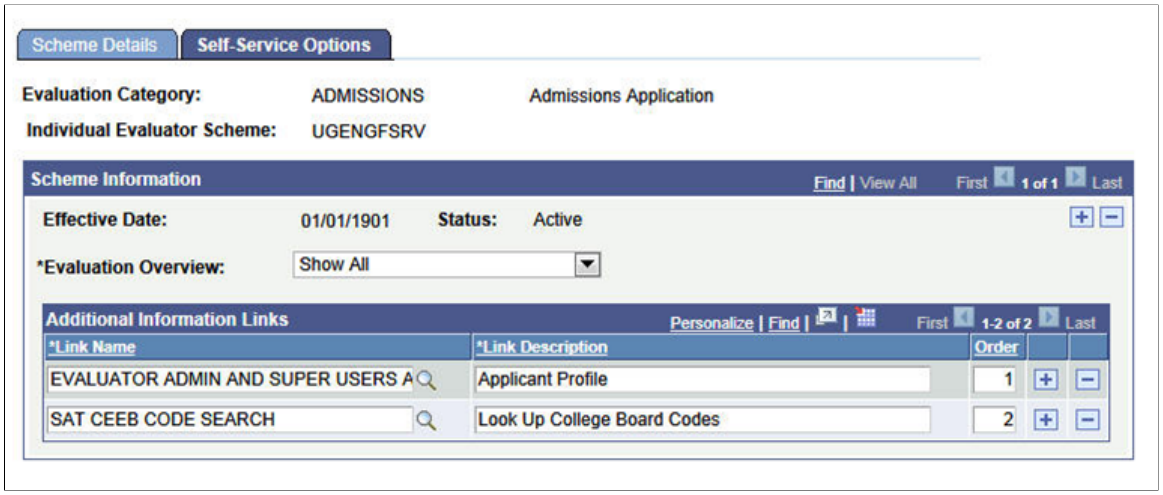
Setting Up Self-Service Options

Access the Self-Service Options page ((Set Up SACR, Common Definitions, Evaluation Management System, Define Individual Evaluator Scheme, Self-Service Options).

Image: Self-Service Options page

This example illustrates the fields and controls on the Self-Service Options page. You can find definitions for the fields and controls later on this page.



Evaluation Overview

The value for this field determines the access an evaluator may have to the Evaluation Overview page. The setting that you select here applies to all evaluators in the scheme. Three values are delivered: *Show All*, *Do Not Show*, and *Show Completed*.

- Select *Show All* to display to the evaluators all levels and activity in the evaluation, uncompleted or completed.
- Select *Do Not Show* if evaluators should not have view access to other levels and activity in the evaluation.
- Select *Show Completed* to display to the evaluators all levels and activity in the evaluation which are completed and have the default value of *Final*.

Additional Information Links

Use this group box to enter all links that should be made available to the participants in this scheme. Links values are defined in the Define Links component. Adding a Link Name here defaults in the Link Description but you can change this description here, if for this scheme, another descriptive named is desired.

Link display may also be controlled by setup at the Evaluation Code level. If links populated there are *not* set as Administrator Only, then they will appear to the scheme participants. If a link is indicated at the Code level and repeated at the scheme level, then the repeated link will be filtered out so it will not appear twice. In that instance, the description from the Evaluation Code level will display. You may give an order to how you would like the links to display on the self-service page. If the same links are provided at the Evaluation Code level, that level takes priority in terms of the display on the self-service page. In other

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words, Evaluation Code links will display as numbered, then the scheme links will display in the order indicated here, after the Code links.

See Campus Community - Evaluation WorkCenter documentation for examples of how the Additional Information section appears on the self-service pages.

Setting Up Evaluation Codes

This section discusses how to:

- Define evaluation code details.
- Set up evaluation schemes.
- Set up evaluation statuses.
- Set up self-service options.

Page Used to Set Up Evaluation Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
Evaluation Info	SCC_GE_EC_DEFN	Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Evaluation Info	Enter details for evaluation codes.
Evaluation Schemes	SCC_GE_EC_SCHEME	Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Evaluation Schemes	Specify administrator and notification options for each evaluation scheme.
Evaluation Statuses	SCC_GE_EC_STATUS	Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Evaluation Statuses	Specify which evaluation status and recommendation field values are to be used for an evaluation code.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Self-Service Options	SCC_GE_EC_SS_OPT	Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Self-Service Options	Configure options for deployment of the Additional Links section in the Evaluation Center for all evaluators associated in the evaluation. Additional Links may be for BI Publisher Reports which will contain data relevant to the evaluation and links to instructional content for conducting the evaluation. These links may be used in conjunction with setup on the Individual Evaluator Scheme and Committee Scheme levels.

Defining Evaluation Code Details

Access the Evaluation Info page (Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Evaluation Info).

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Bundle 34: Added “Early Result Rule” field

Image: Evaluation Info page (1 of 2)

This example illustrates the fields and controls on the Evaluation Info page (1 of 2). You can find definitions for the fields and controls later on this page.

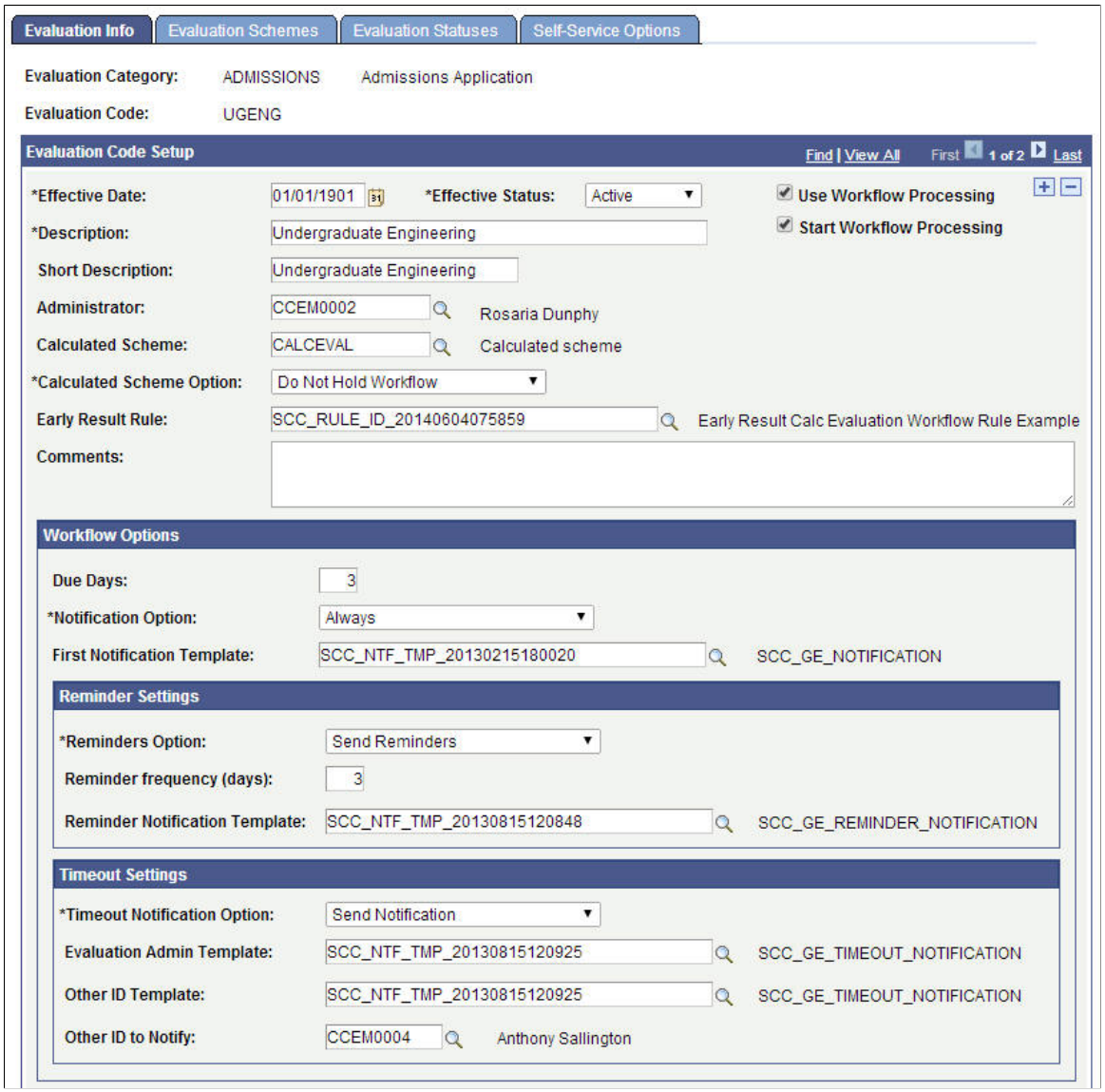

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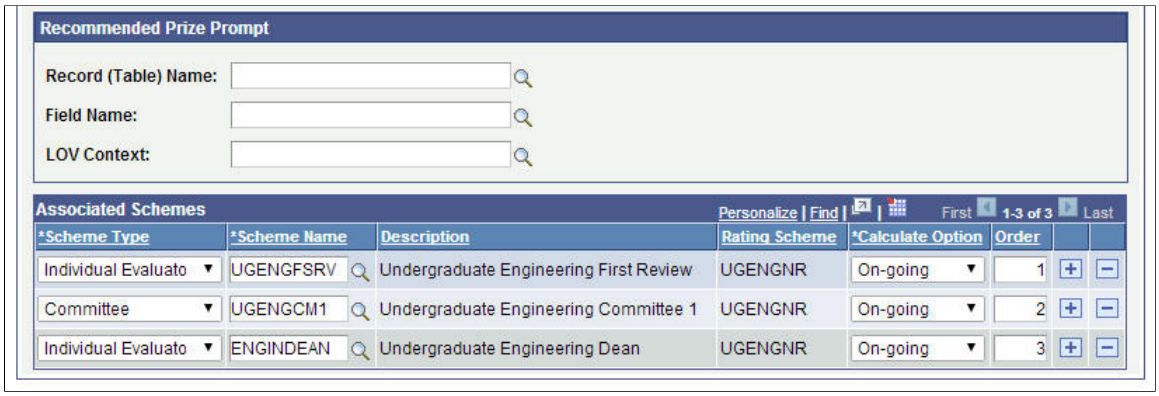
Image: Evaluation Info page (2 of 2)

This example illustrates the fields and controls on the Evaluation Info page (2 of 2). You can find definitions for the fields and controls later on this page.



The Evaluation Code that you define here incorporates many pieces of the evaluation process: evaluative schemes, evaluation flow and processing order, and values valid for the evaluation. In addition to defining the evaluation code, you also associate the code with rating schemes. For example, you can designate a single, calculated rating scheme while multiple individual evaluator and committee evaluation schemes can be pulled together under the evaluation code.

Administrator

Designate a person to administer the evaluation and have oversight of the evaluation process. This Evaluation Administrator enters the final recommendation and evaluation in the Manage Evaluation component's Evaluation Overview page or the Evaluation Decision Entry self-service page.

Calculated Scheme

Enter a scheme here to indicate that you want the system to automatically process the rating components that make up this scheme. The system uses that scheme name, its evaluative elements, and produces an overall rating value.

The calculated scheme may be used in conjunction with Individual Evaluator and Committee schemes. You can direct how the calculated scheme interacts with those schemes and workflow by using the Calculated Scheme Option field.

Rating schemes are set up on the Define Rating Scheme page.

Calculated Scheme Option

This field becomes available when the Calculated Scheme field is populated and the Use Workflow Processing check box is selected. Two values are delivered: *Hold Workflow* and *Do Not Hold Workflow*. The options here represent how the calculated scheme should work in conjunction with Individual Evaluator or Committee Schemes present in the evaluation.

Select *Hold Workflow* if all required components in the calculated scheme should be calculated and an Overall Rating calculated before starting workflow to initiate worklist items and notifications for evaluators.

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Select *Do Not Hold Workflow* if the workflow may proceed even though all required components in the calculated scheme may not be calculated and an Overall Rating calculated.

Early Result Rule

This field prompts against the Rules Engine tables and returns rules that are part of the EMS Early Result Rule Group. The rule identified here interacts with the Evaluation workflow code to determine whether an evaluation should stop or proceed at each order (if logic is present in the rule to check for each scheme order). When this field is populated, when an evaluator submits a final result then the rule will run to see if there is instruction on the workflow based on the evaluator results.

See Setting Up and Using Rules for the Evaluation Management System for more detail on using an Early Result Rule.

Use Workflow Processing

Workflow processing means:

- Adding an evaluation to the worklist of the evaluator or administrator when an evaluation is created manually on the Manage Evaluation component or through the Create and Maintain Evaluations batch process.
- Sending an email notification to the evaluator or administrator when the evaluation is added to his or her worklist.

The worklist is list of evaluations that are open and ready for an evaluator's or administrator's review. Worklist appears on the Evaluation WorkCenter. Alternatively, evaluators and administrators can access the worklist from the navigation path: *Campus Community, Evaluation Management System, Evaluation WorkList*.

Select the Use Workflow Processing check box if you want to use workflow processing for the evaluation code. That is, if you select the Use Workflow Processing check box and subsequently create an evaluation for evaluation code, the workflow will add the evaluation to the worklists of the evaluators and administrators who are associated with this evaluation code.

If you select the Use Workflow Processing check box, the Workflow Options group boxes becomes available on this page and the Evaluation Schemes page. Use the Notification Option field in these group boxes to specify whether or not you want the workflow to send an email notification to the evaluator or administrator when an evaluation is added to his or her worklist.

Important! Worklist generation and email notification uses the Notifications Framework. You should set up Notifications Framework before selecting the Use Workflow Processing check box. See Campus Community's Notifications Framework documentation.

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You will not want to select this check box if you do not want to use the Evaluation WorkCenter and want to manage the evaluations through the Manage Evaluation administrative component. The key difference between the worklist and Manage Evaluation component is that when an evaluator signs into the system, he or she can view and submit evaluations associated with all evaluators (including himself or herself) in the Manage Evaluation component but the Evaluation WorkCenter and the worklist display and allow submission of only those evaluations that are assigned to the signed in evaluator.

Start Workflow Processing

This check box is available only if you select the Use Workflow Processing check box.

Select this check box if you want the system to automatically start workflow processing at the evaluation creation stage, whether created manually through the Manage Evaluation component or created through batch processing.

If you select this check box and the Calculated Scheme Option field is set to *Hold Workflow* and the batch calculation process (SCC_GE_CALC) calculates a value for all required rating components, then the batch process will attempt to start workflow for the evaluation.

For more information on the batch calculation process, see Setting Up and Using Rules for the Evaluation Management System.

If you do not select this check box, then you must manually trigger the workflow processing by clicking the Start Workflow button on the Manage Evaluation component's Evaluation Overview page. The button is available only when you save the Manage Evaluation component. If the evaluation was created by the Create and Maintain Evaluations batch process, you will see the button by navigating to Manage Evaluation component's Evaluation Overview page. You can also start workflow for a group of evaluations by using the Start Workflow process option in the Create and Maintain Evaluations batch process.

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Important! An institution will have to consider carefully whether or not to select the Start Workflow Processing check box. If this check box is selected, the system will automatically trigger the workflow processing and that might cause problems if all the elements of the evaluation processing are not present in the system (for instance, missing evaluators or administrators). For those evaluations, where evaluators might be assigned on an ad-hoc basis after evaluation creation, it is most likely that the institution will want the Start Workflow Processing deselected and will want to manually trigger the workflow processing or use the start workflow process option via the batch process once they have updated an evaluation with all evaluators.

Important! Because of workflow processing, it is important that the proper use of an effective dated component be adhered to. If changes are needed to an evaluation code setup, then a new effective dated row should be added in order to ensure that the integrity of the data in the Manage Evaluation component and workflow processing are not affected.

Notifications Framework and Evaluation Management System

EMS uses the Notifications Framework for generating the worklist and to send email notifications to evaluators and administrators. There are three types of email notifications that may be used as part of the evaluation flow:

- The initial notification to alert an evaluator that an evaluation is ready for his or her review.
- Reminder notifications to the evaluator about the pending evaluation.
- A timeout notification to advise the evaluator (and others) that an evaluation is past due.

EMS delivers a Notification Consumer Setup record that you can access from the Notification Consumer Setup page. Do not change the consumer name in this delivered Notification Consumer Setup record. Also, do not add a new Notification Consumer Setup record for EMS.

This delivered record has four templates:

- SCC_GE_WORKLIST (for worklist)
- SCC_GE_NOTIFICATION (for initial email notifications)
- SCC_GE_REMINDER_NOTIFICATION (for reminder notifications)
- SCC_GE_TIMEOUT_NOTIFICATION (for timeout notifications)

You can modify SCC_GE_NOTIFICATION, SCC_GE_REMINDER_NOTIFICATION, and SCC_GE_TIMEOUT_NOTIFICATION templates. You can also build new templates for email notifications and use the Notification Consumer Setup page to add these templates in the delivered Notification Consumer Setup record for EMS. For example, you might want a different subject line in the email notification sent to evaluators in graduate schemes as compared to evaluators in undergraduate schemes. In such a case, you might want to define two email notification templates.

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Important! Do not modify the delivered SCC_GE_WORKLIST template or replace it with a new worklist template in the delivered Notification Consumer Setup record for EMS.

See Campus Community's Notifications Framework documentation.

Workflow Options

This group box is available only if you select the Use Workflow Processing check box.

This group box is for the evaluation administrator you specified in the Administrator field of this page. Therefore, once all the levels (that you set up in the Associated Schemes group box of this page) are complete and it is the evaluation administrator's turn to complete the evaluation, then these values in the Workflow Options group box will apply to this administrator stage of the evaluation.

Due Days

Enter the number of days the administrator has to complete their review. For example, if you enter *5* and the system assigns the evaluation to the administrator on March 3, 2013 and triggers the Notifications Framework on the same date, then the administrator has to complete the evaluation by March 8, 2013.

The system calculates a due date from the number of days you enter in this field and populates the Notifications Framework PS_SCC_NTFREQ_ITM.SCC_NTF_DATE_TO field with that date.

This field defaults to *0*, which means the due date is the date when the Notifications Framework is triggered.

The Evaluation Decision Entry self-service page displays the due date.

Notification Option

Select *Always* if you want the workflow to always send an email notification to the administrator when an evaluation is created for the evaluation code manually or through the batch process. Note that the workflow can send a notification only if you have selected the Start Workflow Processing option on this page or if you start the workflow for evaluations through the Manage Evaluation component or batch process.

Select *Never* if you do not want the workflow to send a notification.

This field is applicable only for the first notification that an administrator receives. You can choose not to send the first notification (by selecting *Never* in this field) but choose to send the reminder and timeout notifications using the Reminder Settings and Timeout Settings sections.

First Notification Template

Select the Notification Template ID of *email* notification type defined for the Evaluation Management System consumer.

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The system will use this template to send an *email* notification to the administrator after all other levels (schemes) of the evaluation are complete.

Reminder Settings

Use this section to configure the reminder emails that the system sends to the evaluation administrator. Then, use the Notifications Framework's Worklist Batch process (SCC_NTFWKLTO) to generate the reminder notifications. The system will send reminders every number of days (specified in the Reminder Frequency field of this section) as long as the evaluation has not been completed and has not timed out.

For more information on the Worklist Batch process:

See Campus Community's Notifications Framework documentation.

Reminders Option

This field controls whether an email reminder notification will be sent and in what manner. Values for this field are:

No reminders: Select if you do not want the reminder notification to be sent. If you select this value, the Reminder frequency (days) and Reminder Notification Template fields become unavailable.

One per Evaluation Code: Select if you want to send one reminder to the administrator for the evaluation code. For example, suppose an evaluation administrator CCEM0012 is associated with multiple evaluations of an evaluation code Graduate Science (GRADSCI). GRADSCI is set to *One per Evaluation Code*. CCEM0012 is not associated with evaluations of any other evaluation code. When one or more of these evaluations need a reminder, the batch process will send only one reminder notification to CCEM0012. When using this setting, you may want to associate the code with a template where the content has a generic approach. For example: *You have Graduate Science evaluations waiting for review. Please login to the Evaluation Center to complete these evaluations.*

One per Evaluator: Select if you want to send only one reminder to an evaluation administrator. For example, suppose evaluation administrator CCEM0012 is associated with multiple evaluations of evaluation code GRADSCI and multiple evaluations of evaluation code Research Thesis Nanotechnology (NANOTHESIS). Both evaluation codes are set to *One per Evaluator*. When one or more of these evaluations needs a reminder, the batch process will only send one reminder notification to CCEM0012. When using this setting, you may want to associate the code with a template where the content has a more generic approach as compared with a template for One per Evaluation Code. For example, the following notification for One per Evaluator does not specify the evaluation code: *You have evaluations waiting for review. Please login to the Evaluation Center to complete these evaluations.*

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Send Reminders: Select if you want to send a reminder for each evaluation that the evaluation administrator needs to complete. An evaluation administrator may be associated with multiple evaluations for multiple evaluation codes, and if you select this value, the batch process will send a notification to that evaluation administrator for each evaluation that needs a reminder. For example, assume that the evaluation administrator CCEM0012 has two evaluations for GRADSCI and three evaluations for NANOTHESIS. Based on the Reminders Frequency setting, all five evaluations need a reminder. Because the setting is *Send Reminders* for both the evaluation codes, the evaluation administrator will receive five reminder notifications (one for each evaluation) when the batch process is run. When using the Send Reminders setting, the content of the template could be very specific indicating who the evaluation is for and the evaluation code.

Reminder Frequency (days)

Indicate how often the system should trigger a reminder. To determine when to trigger a reminder, the system uses the date the evaluation was assigned to the administrator (PS_SCC_NTFREQ_ITM.SCC_NTF_DATE_FROM) or the date the last reminder notification was sent (PS_SCC_NTFREQ_RMDR.SCC_NTFREQ_RMD_DTM). For example, suppose evaluation administrator CCEM0012 is assigned a GRADSCI evaluation on August 10, 2013. The Reminder Option is set to *Send Reminders* and the Reminder Frequency is set to *2*. Assuming the administrator does not complete the evaluation (and the evaluation has not timed out), the following will happen:

On August 12, 2013 a reminder notification will be generated. The last reminder date for the evaluation is set to August 12, 2013.

On August 14, 2013 a reminder notification will be generated. The last reminder date for the evaluation is set to August 14, 2013.

Reminders will continue to be generated in this fashion every 2 days until the evaluation is completed or times out.

Reminder Notification Template

Select a Notification Template ID of *email* notification type defined for the Evaluation Management System consumer. The template that you specify in this field will be used by Notifications Framework when sending a reminder to the evaluation administrator.

Example of how the batch process sends a reminder notification if the evaluation administrator is associated with evaluation codes that have different reminder options:

Graduate Science (GRADSCI) is set up for reminders to be processed as *One per Evaluation Code*. Research Thesis Nanotechnology (NANOTHESIS) is set up as *One per Evaluator*. The evaluation administrator (CCEM0012) has two GRADSCI evaluations and two NANOTHESIS evaluation. These four evaluations have met the requirements for a reminder notification to be sent. How the process behaves is determined by which evaluation it processes first. If the process encounters a

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GRADSCI evaluation first, the system sends a reminder. Subsequently, when the process encounters a NANOTHESIS evaluation, it will not send a notification because NANOTHESIS is set up as One per Evaluator. Therefore, in this case, only one notification reminder is sent.

Conversely, if the process encounters the NANOTHESIS evaluation first, a reminder will be sent for NANOTHESIS. Subsequently, a reminder will also be sent for GRADSCI because it is set up as One per Evaluation Code. Therefore, in this case, two notification reminders are sent to CCEM0012.

Timeout Settings

This section enables email notifications to be sent when an evaluation is past due. Timeout notifications can be sent to the evaluation administrator and to another ID that you designate in this section.
The system will commence the timeouts when the worklist item is marked as ready and the PS_SCC_NTFREQ_ITM.SCC_NTF_DATE_TO date has passed. The Notifications Framework's Worklist Batch Process (PS_SCC_NTFWKLTO) generates the time out notifications. For information on setting up the process to run automatically every day:

See Campus Community's Notifications Framework documentation.

When the batch process runs, it sets the PS_SCC_NTFREQ_ITM.SCC_NTFREQ_SUB_STS = *T*. In terms of worklist, when an evaluation times out, it remains in the worklist until the evaluator completes the evaluation.

Note that self service indicates the due date and also indicates if the evaluation is overdue. For example, if an evaluation is overdue, the Evaluation Decision Entry self-service page displays a message indicating that the evaluation is past due.

Timeout Notification Option

This field controls whether timeout notifications will be sent to the evaluation administrator and the other designated ID. Values for this field are:

Send Notification: Select if you want timeout notifications to be sent.

Do not send Notification: Select if you do not want the timeout notifications to be sent. If you select this value, the other fields in this section become unavailable.

Evaluation Admin Template

Select a Notification Template ID of *email* notification type defined for the Evaluation Management System consumer. The template that you specify in this field will be used by Notifications Framework when sending a timeout notification to the evaluation administrator.

Other ID Template

Select a Notification Template ID of *email* notification type defined for the Evaluation Management System consumer. The template that you specify in this field will be used by Notifications Framework when sending a timeout notification to the person specified in the Other ID field.

Other ID

Select a ID to whom you want to send a timeout notification.

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Recommended Prize Prompt

The fields in this group box enable you to specify the table that the system should prompt against to return values for the Recommend Prize field in the Manage Evaluations administrative component. If you do not specify values in these fields, the system will use the Honors and Awards table as the default.

Record (Table) Name Enter the table name that the system should reference during prompting.

Field Name Enter the field from the record that the system should reference during prompting.

LOV Context If using with List of Values (LOV) functionality, enter the LOV context to be referenced.

See Setting Up List of Values.

Associated Schemes

The fields in this group box list which individual or committee schemes are part of this evaluation.

Scheme Type Select either *Committee* or *Individual Evaluator*.

Scheme Name Enter either an Individual Evaluator Scheme or Committee Scheme name, based on the value you selected in the Scheme Type field.

Calculate Option Select *On-going* or *At End* to indicate whether the system should update overall ratings as ratings are entered for the evaluation, or wait until the end to calculate it.

Order Enter a numeric value to establish the order in which the system should process the various levels.

Note: Specify each scheme's administrator and workflow settings on the Evaluation Schemes page.

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Setting Up Evaluation Schemes

Access the Evaluation Schemes page (Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Evaluation Schemes).

Image: Evaluation Schemes page (1 of 4)

This example illustrates the fields and controls on the Evaluation Schemes page (1 of 4). You can find definitions for the fields and controls later on this page.

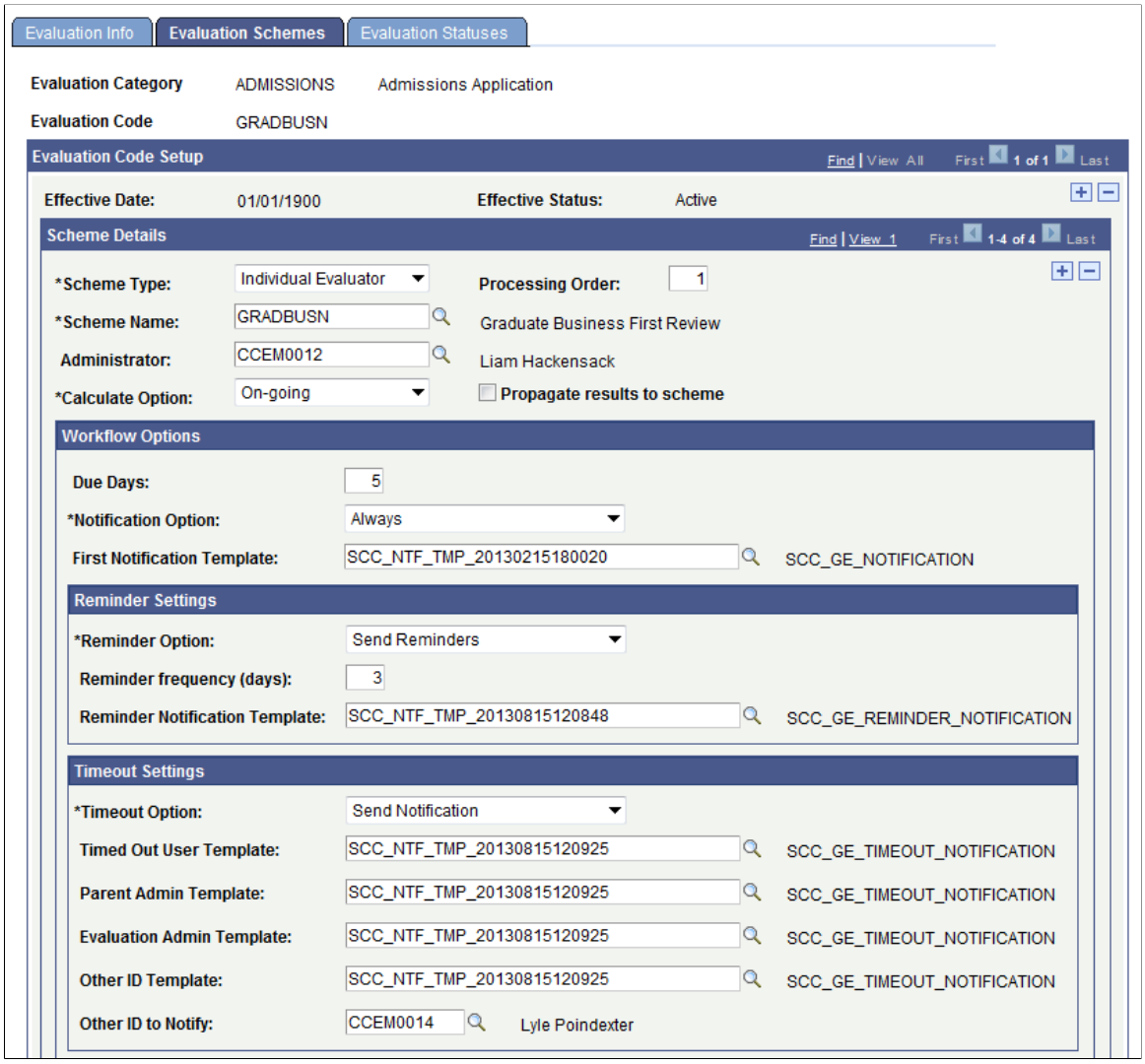

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Image: Evaluation Schemes page (2 of 4)

This example illustrates the fields and controls on the Evaluation Schemes page (2 of 4). You can find definitions for the fields and controls later on this page.

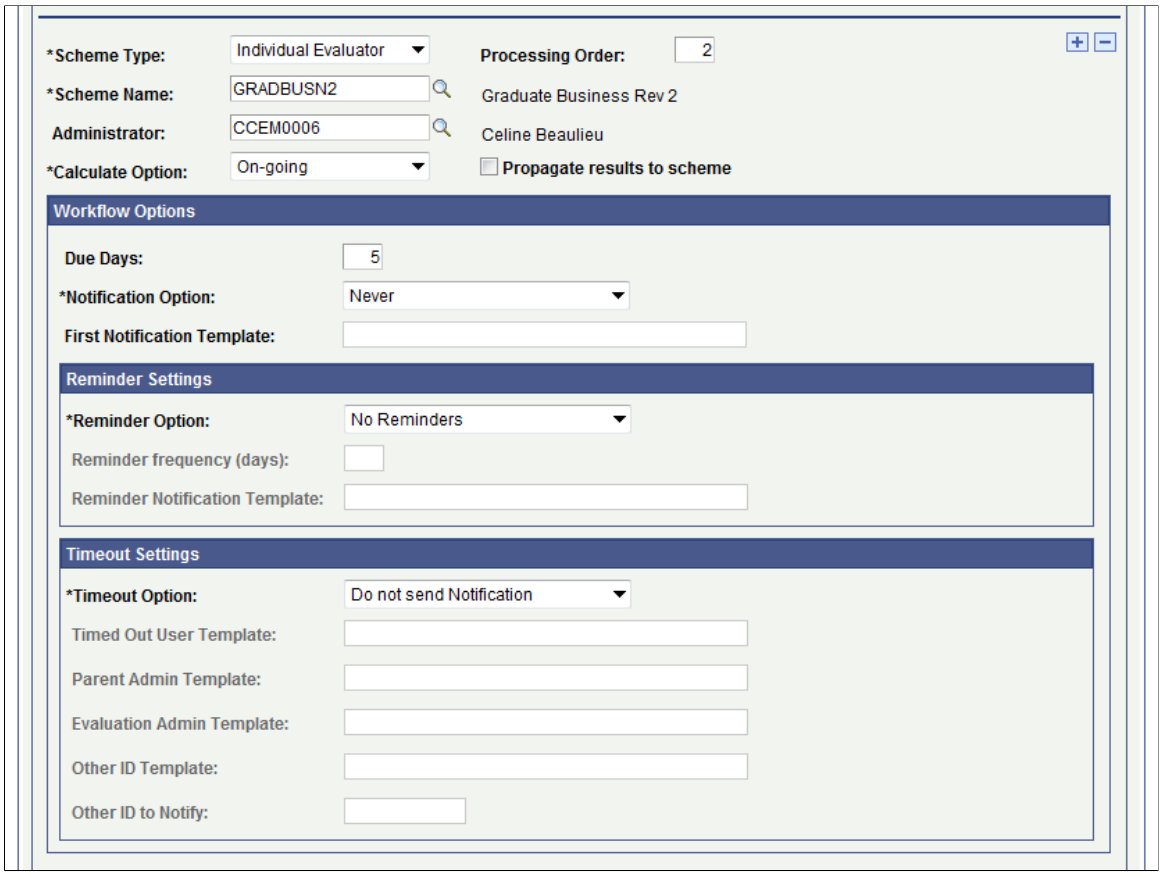

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Image: Evaluation Schemes page (3 of 4)

This example illustrates the fields and controls on the Evaluation Schemes page (3 of 4). You can find definitions for the fields and controls later on this page.

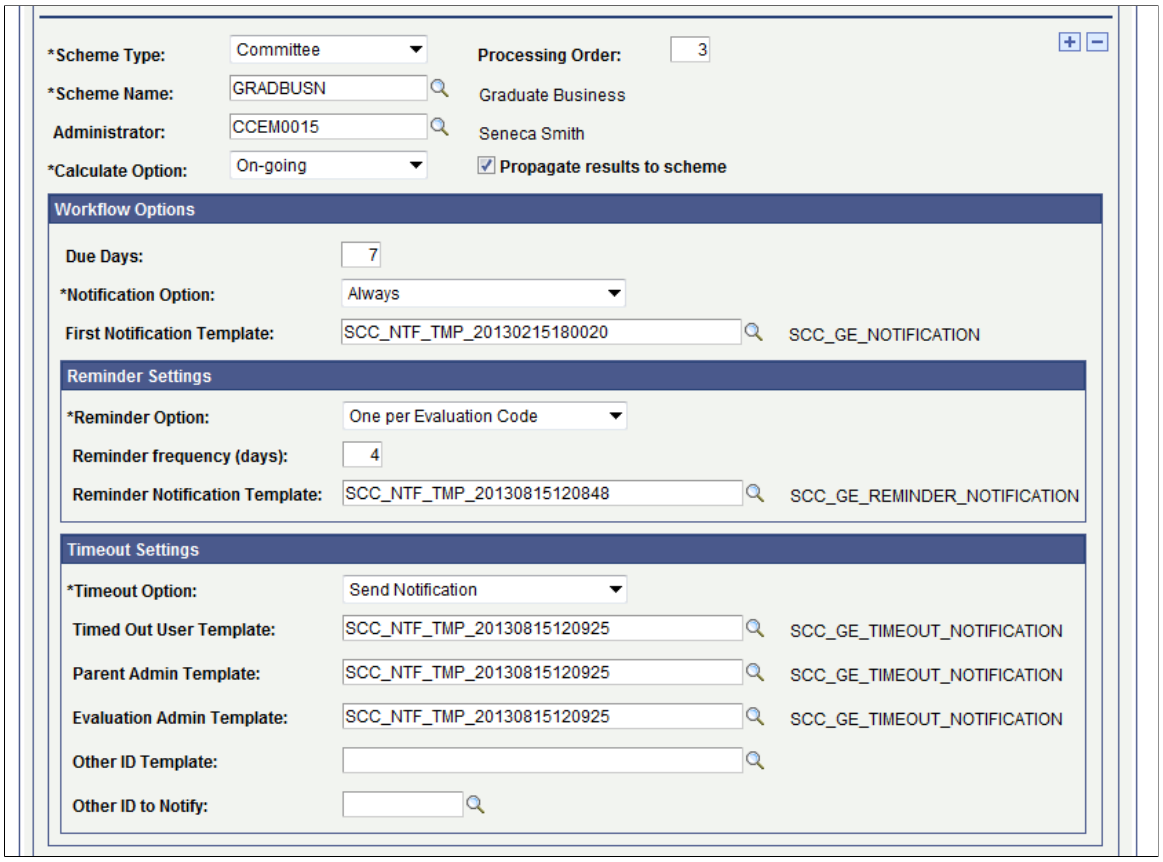

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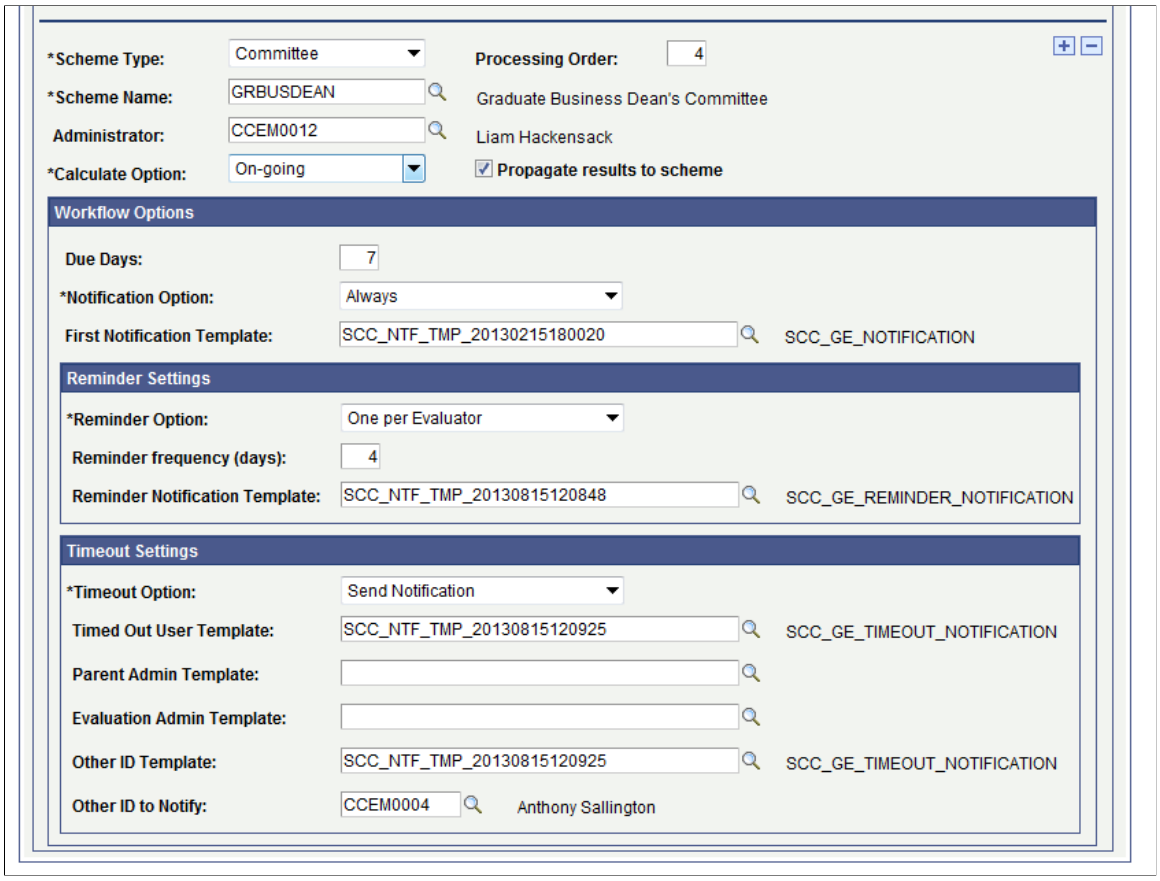
Image: Evaluation Schemes page (4 of 4)

This example illustrates the fields and controls on the Evaluation Schemes page (4 of 4). You can find definitions for the fields and controls later on this page.



Each scheme that you enter on the Evaluation Info page automatically appears on the Evaluation Schemes page. You can add more schemes on the Evaluation Schemes page and the system will add those schemes automatically to the Evaluation Info page.

Use the Evaluation Schemes page to specify the administrator and workflow options for each scheme. For example, if you entered four schemes in the Associated Schemes group box of the Evaluation Info page, use this page to specify the administrator and workflow options for each of the schemes.

Workflow options defined for each scheme apply to the administrator of the scheme and all members of the scheme.

Administrator

Indicates the person responsible for the scheme who will enter the final results at the scheme level in the Manage Evaluation component's Individual Evaluator Scheme page or Committee Scheme page or the Evaluation Decision Entry self-service page. The system populates this field by default from the scheme setup level (Define Individual Evaluator Scheme and Define Committee Scheme pages). If an administrator value does not exist at the scheme setup level, the system populates this field by default from the Evaluation Info page. You can override the default value for this field.

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Calculate Option

This field refers to the Overall Rating field associated with the scheme in the Manage Evaluation component's Individual Evaluator Scheme page or Committee Scheme page or the Evaluation Decision Entry self-service page and provides some control over how you will want the system to calculate the Overall Rating value.

On-going: Select if you want that the Overall Rating field should display the accumulative value as the evaluation progresses with evaluators entering rating values for each component in the Individual Evaluator Scheme page or Committee Scheme page or the Evaluation Decision Entry self-service page.

At End: Select if you want that the Overall Rating field should *not* display a value until all evaluators have provided rating values for each required component in the scheme and marked their evaluation *Final*.

Processing Order

This field establishes the order in which the workflow should process the various schemes.

You can also define the workflow order among evaluators of an individual evaluator scheme in the Define Individual Evaluator Scheme page. Additionally, you can also define the workflow order among committees of a committee scheme in the Define Committee Scheme page.

See Defining Individual Evaluator Schemes.

See Defining Committee Schemes.

For information on the self-service worklist, refer to “Using Self-Service Worklist” topic in Campus Community - Evaluation WorkCenter documentation.

For an example of how the EMS workflow processes the evaluators and administrators for an evaluation, refer to “Entering Evaluations” topic in Campus Community - Evaluation WorkCenter documentation.

Propagate results to scheme

If you select this check box, the system automatically completes the higher level(s) of the scheme when one of the following conditions is true:

- Only one evaluator exists in an individual evaluator scheme.
- Only one committee exists in a committee scheme.
- Only one evaluator exists in a committee.

Individual Evaluator Scheme: If only one evaluator exists in the scheme, the system will automatically complete the scheme level when the evaluator completes his or her evaluation. The

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system copies the values for recommendation, status, and overall rating to the scheme level.

Committee Scheme: If only one committee exists in the scheme, the system will automatically complete the scheme level when the committee completes their evaluation. The system copies the values for recommendation, status, and overall rating to the scheme level.

Committee: If only one evaluator exists in the committee, the system will automatically complete the committee level when the evaluator completes his or her evaluation. The system copies the values for recommendation, status, and overall rating to the scheme level. If there is only one committee in the scheme, the values will also be copied to the scheme level.

Note: When this check box is selected, the system does not send an email notification to the committee or scheme administrators whose evaluations were automatically marked as completed.

Workflow Options

Most of the fields in this group box are similar to those on the Evaluation Info page.

Use this group box to specify the due date, notification option for the first notification, email notification template, reminder settings and timeout settings for each scheme.

Schemes may have different due dates (for example, an individual evaluator scheme may take less days to complete the evaluation as compared to a committee scheme). For a scheme you may decide that the workflow should send the first email notification (by setting the scheme's notification option to *Always*), while for another scheme you may decide that the workflow should not send the first email notification (by setting the scheme's notification option to *Never*). In addition, schemes may have different first email notification templates (for example, members in an individual evaluator scheme may need less instructions in their email notifications as compared to members of a committee scheme).

The difference between the Timeout Settings sections on the Evaluation Schemes page and the Evaluation Info page is that the section on the Evaluation Schemes page contains two additional fields: Timed Out User Template and Parent Admin Template.

Timed Out User Template

Select a Notification Template ID of *email* notification type defined for the Evaluation Management System consumer. The template that you specify in this field will be used by Notifications Framework when sending a timeout notification to the evaluator or committee or scheme administrator who has the past due evaluation.

Parent Admin Template

Select a Notification Template ID of *email* notification type defined for the Evaluation Management System consumer. The template that you specify in this field will be used by Notifications Framework when sending a timeout notification to the person who is the immediate administrator of the evaluator who has the past due evaluation. Who that person is depends on where in the flow the evaluator is. For example, if it is

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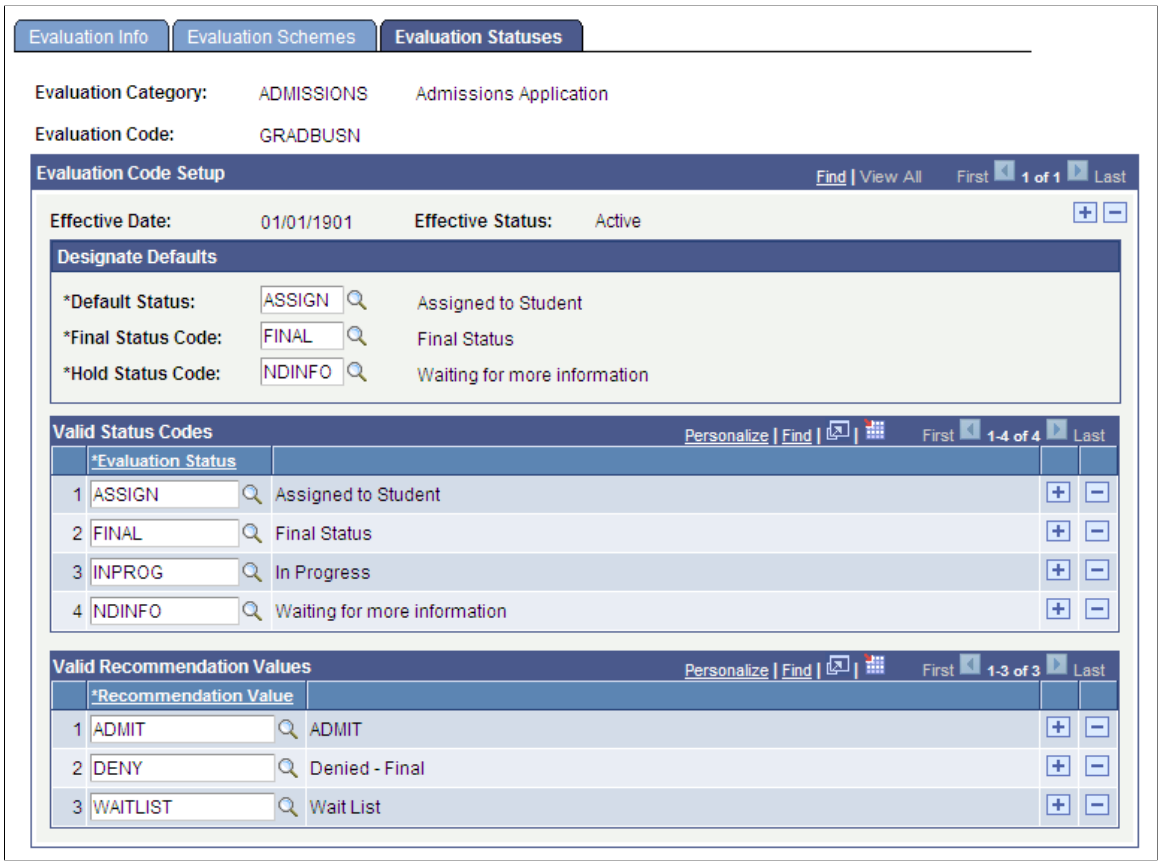
an individual evaluator scheme, then for the evaluator, the immediate administrator will be the scheme administrator. If it is a Committee Scheme, then for a committee member, it would be the committee administrator. For a committee administrator, it would be the committee scheme administrator.

Setting Up Evaluation Statuses

Access the Evaluation Statuses page (Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Evaluation Statuses).

Image: Evaluation Statuses page

This example illustrates the fields and controls on the Evaluation Statuses page. You can find definitions for the fields and controls later on this page



Designate Defaults

The fields in this group box list enable you to define default statuses for three key evaluation actions. The system will use these statuses for processing such as auto-calculation and the evaluation batch creation. The field values you enter here affect the values available in the Valid Status Codes group box.

Default Status

Enter the default status value for the system to use during the batch evaluation code assignment process. The system will also use this value when you manually assign an evaluation code, but it can be overwritten.

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Statuses are defined on the Define Evaluation Status page.

Final Status Code Enter the status value for the system to use to signify that the evaluation or a level of the evaluation is complete.

Hold Status Code When an evaluation is placed on hold, this value will signify to the system to suspend processing for the evaluation.

Valid Status Codes

The fields in this group box enable you to indicate any statuses applicable to this evaluation. If you entered a default value in the Designate Defaults group box above, those values automatically display here. However, you can add to the list.

Note: The system forces all Evaluation Status codes you enter here at all levels throughout the evaluation (such as at the individual evaluator level, committee level, or committee member level).

Valid Recommendation Values

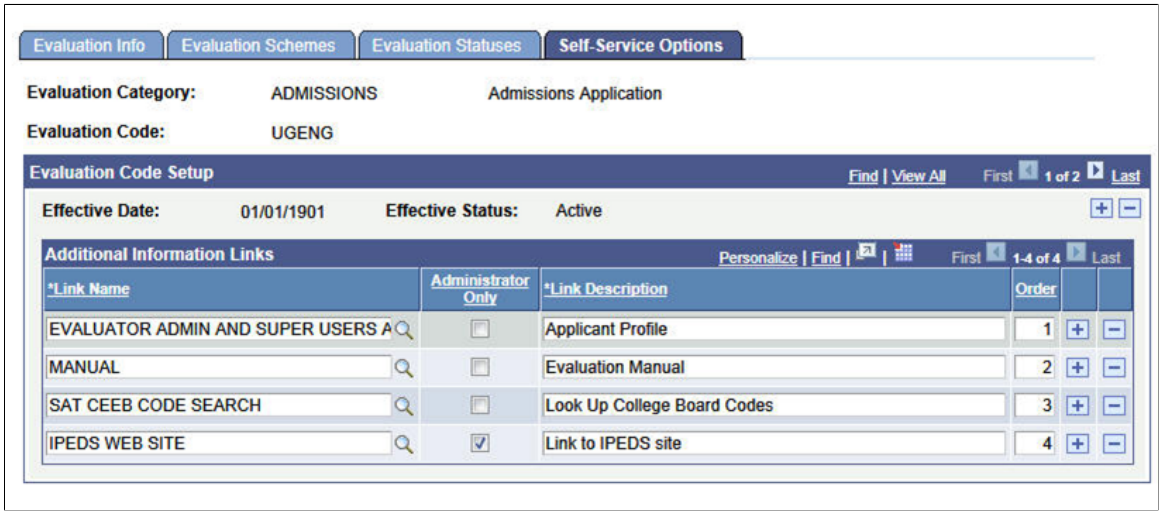
The fields in this group box enable you to indicate which recommendation values are applicable to this evaluation. The values you enter here apply to the highest level of the evaluation; you can designate other recommendation values at the individual evaluator and committee scheme levels.

Setting Up Self-Service Options

Access the Self-Service Options page (Set Up SACR, Common Definitions, Evaluation Management System, Define Evaluation Code, Self-Service Options).

Image: Self-Service Options page

This example illustrates the fields and controls on the Self-Service Options page. You can find definitions for the fields and controls later on this page



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Additional Information Links

Use this group box to enter all links that should be made available to all the participants in this evaluation. Links values are defined in Define Links component. Adding a Link Name here defaults in the Link Description but you can change this description here, if for this code, another descriptive named is desired. Links may be designated as only for Administrator access and will only appear on the Evaluation Administrator self-service page.

Links may also be defined at the Individual Evaluator Scheme and Committee Scheme levels. If links populated at the scheme level are repeats of the Evaluation Code level setup (and not set as Administrator Only), then the repeated scheme link will be filtered out so it will not appear twice. In that instance, the description from the Evaluation Code level will display. You may give an order to how you would like the links to display on the self-service page. If the same links are provided at the scheme levels, the Evaluation Code setup takes priority in terms of the display in the self-service page. In other words, Evaluation Code links will display as numbered, then the scheme links will display in the order indicated, after the Code links

See the Campus Community - Evaluation WorkCenter documentation for examples of how the Additional Information section appears on the self-service pages.

Setting Up Evaluation Management Security

This section discusses how to define security settings for evaluations.

Page Used to Set Up Evaluation Management Security

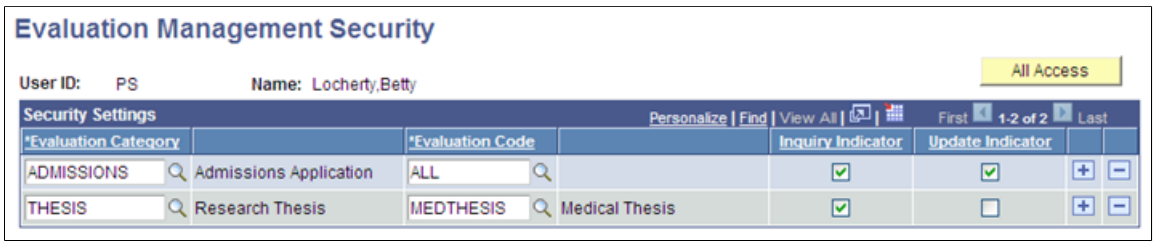
Page Name	*Definition Name*	*Navigation*	*Usage*
Evaluation Management Security	SCC_GE_SCRTY	Set Up SACR, Security, Secure Student Administration, Evaluation Management Security	Enter security settings for individual user IDs.

Defining Security Settings for Evaluations

Access the Evaluation Management Security page (Set Up SACR, Security, Secure Student Administration, Evaluation Management Security).

Image: Evaluation Management Security page

This example illustrates the fields and controls on the Evaluation Management Security page.



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Setting Up and Using Rules for the Evaluation Management System

Bundle 34: This paragraph is updated

This topic provides information about the system data delivered with Evaluation Management System (EMS) in Bundles 33 and 34 (April and July 2014) and the way that EMS interacts with the Rules Engine. In addition to this required system data, we have provided sample rules as an introduction to how the Rules Engine can be used with the EMS feature. Because EMS is flexible and the data that may be evaluated will differ among evaluative processes, much of what is delivered is intended as examples to support our sample rules. For the Calculated Rating Scheme scenario we use an admissions example where academic data and test score data is evaluated to produce an overall rating for a calculated rating scheme in an evaluation. For the Early Result rule scenario, we provide sample rules to illustrate how a rule may be used to interact with the workflow. It is expected that you will want to create your own Entity Profiles, Rule Categories, and Rules to support your specific evaluation business needs.

This topic provides an overview of the Rules Engine and Entity Registry and discusses:

- Setting up and using rule categories for the Evaluation Management System.
- Using data sets.
- Setting up and using rule groups.
- Using sample rules.
- Evaluation Management System/Rules Engine integration.
- Modifying and using system data rules.

Note: The assigning of different colors to different Rules Engine Manager elements for purposes of displaying the Elements in different colors in user interfaces is *optional* and does not affect how a Rule is used in System processing. If no color setup is done, all Element text is displayed in black.

Understanding the Rules Engine and the Entity Registry

The Rules Engine accesses (that is, reads, creates, updates) data in the Campus Solutions database via a system object known as an Entity. An Entity can combine a set of system tables in a particular functional area, where a *base* entity can serve as the root of an entity *tree* representing the relationships between each element of a particular data structure. Each field in the actual table is represented as a property of the entity.

The structure and properties of an entity, as well as its relationships to other entities, are stored in the Entity Registry. Entities have been provided specifically for data encompassed by the EMS feature. In

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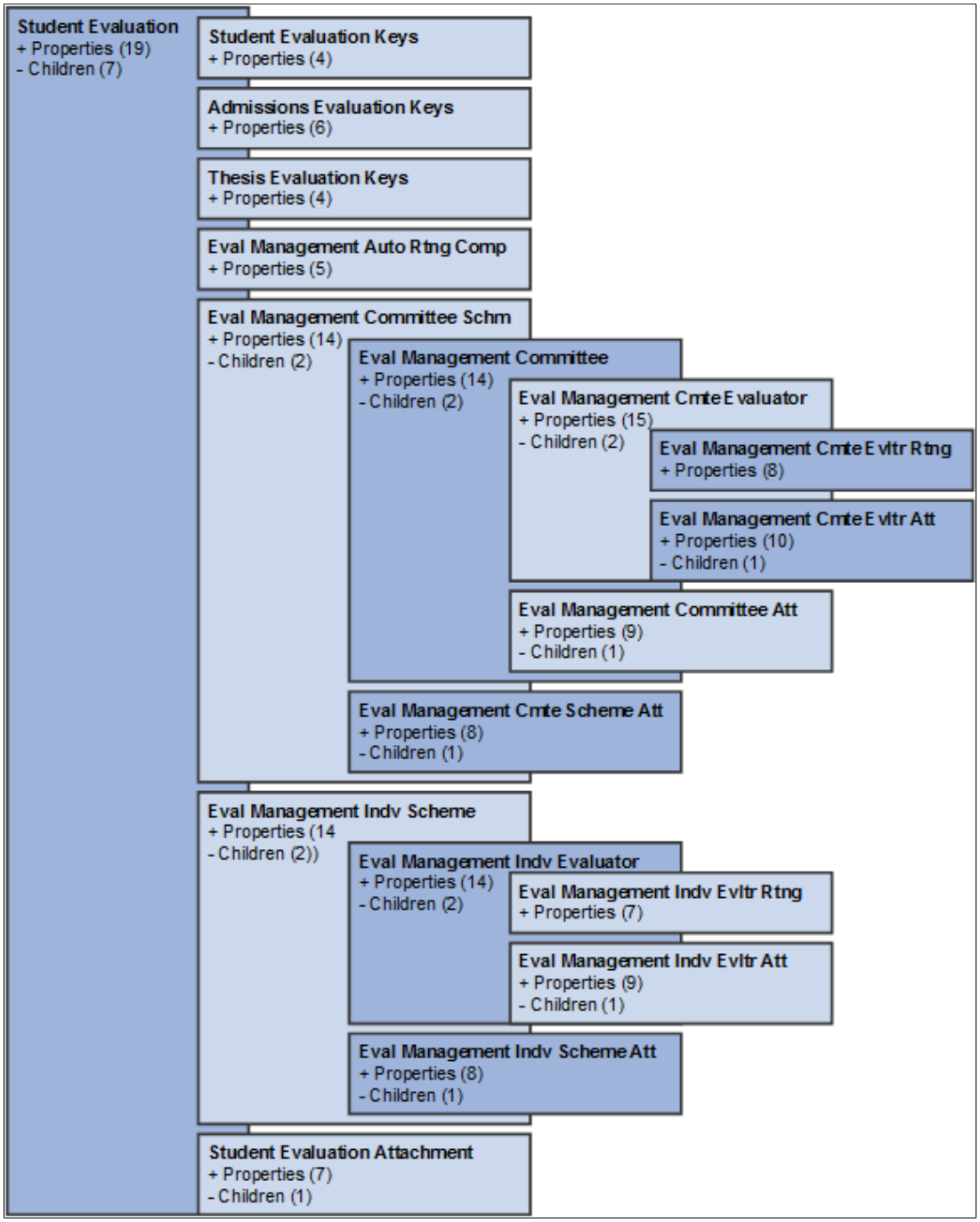
addition, a number of other entities exist in the Registry which may be leveraged for use in the Rules Engine. The following diagram illustrates the EMS hierarchical structure:

Image: EMS hierarchical structure

This example illustrates the EMS hierarchical structure.



Note: We highly recommend that you do NOT update the EMS entities in your rules. The system is designed to handle evaluations in a specific manner and any outside updates could corrupt your evaluation data.

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Entity Profiles

Because the Rules Engine always accesses data via the Entity Registry, the Entity Registry Entity Profile construct is used to restrict access to one or more entities, as well as the properties within a specific entity. An Entity Profile is an important attribute of a Rule Category, which is the Rules Engine feature that governs security.

Related Links

Setting Up the Rules Engine
Understanding Entity Registry
Setting Up Entity Profiles

Setting Up and Using Rule Categories for the Evaluation Management System

A Rule Category controls the following:

- What data can be accessed by rules of this category: each category has an Entity Profile.
- Which rule groups (a user defined way of organizing and managing rules) are governed by this category.
- What system roles/users have access to create/update rules of this category.

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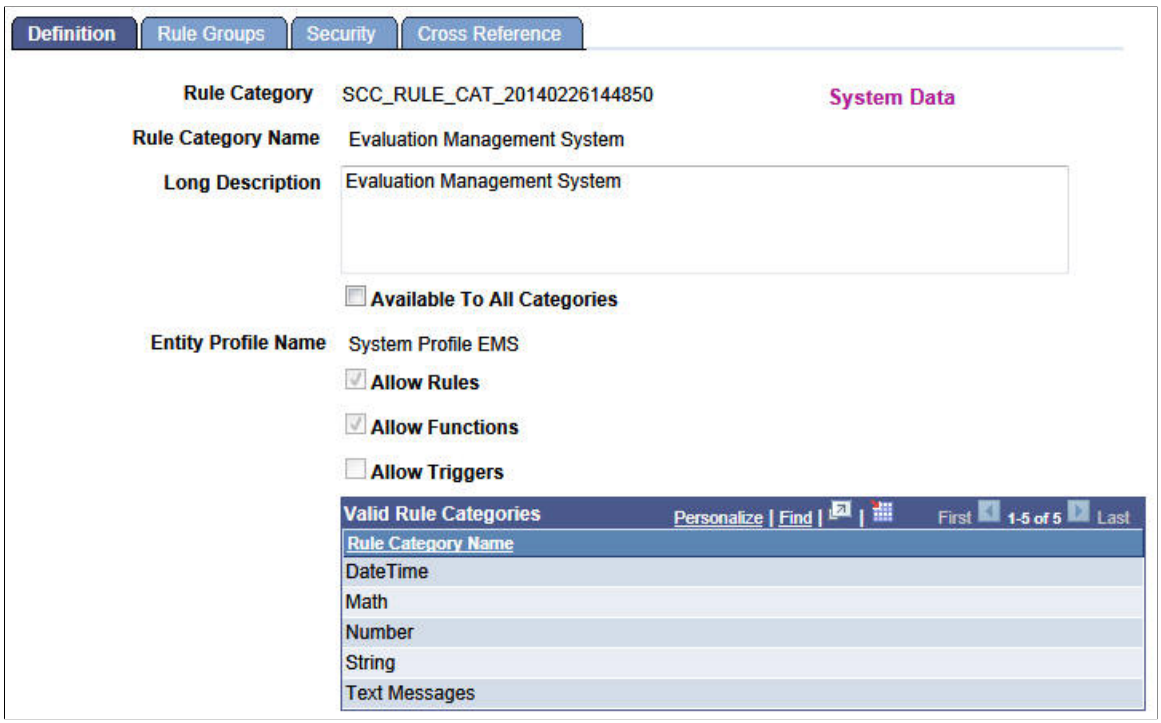
Defining Rule Categories

Access the Rule Category - Definition page (Set Up SACR, System Administration, Rules Engine Setup, Define Categories, Definition).

Image: Rule Category - Definition page: Evaluation Management System Rule Category

This example illustrates the fields and controls on the Rule Category - Definition page for the Evaluation Management System Rule Category.



Entity Profile Name

System Profile EMS: This entity profile enables rules with this rule category to use the included system (delivered) entities as its 'base' entity. As noted earlier in this topic, this Entity Profile is intended as an example and likely will not meet the wide array of your evaluation business use cases. The image of the Entity Profile page (Set Up SACR, System Administration, Entity, Entity Profile) later in this section is just one illustration of the way that entities may be grouped into an Entity Profile to support the rules used under one Rule Category.

Allow Rules, Allow Functions, Allow Triggers

Theses check boxes indicate the Rules Engine privileges available to roles (or an individual user) authorized for this rule category. As delivered, this Evaluation Management System Category definition enables users to create Rules and Functions. As noted above, it is likely that you will create your own rule categories and set these check boxes according to your business needs.

Valid Rule Categories

Valid rule categories allow a user with explicit security access to a rule category (as defined on the Rule Category security page – see later in this documentation), in this case Evaluation Management System, to call rules from these categories without having specific access to those categories. For example user

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CSUSER-01 has access to Evaluation Management System. When creating a rule of this category, CSUSER-01 can call rules with any of the specified categories here, but cannot create a rule with one of those categories.

Image: Entity Profile page: Evaluation Management System example

As mentioned in the discussion of the Entity Profile Name field (on the Definition page), this image illustrates just one way that entities may be grouped into an Entity Profile to support the rules used under a rule category.

Entity Profile ID: SCC_EPRFL_20140226141343

Entity Profile Name: System Profile EMS

Profile Description: System Profile for Evaluation Management System

*Profile Type: Rules Engine

Parent Profile:

Personalize | Find | First 1-20 of 20 Last

Entity Name	*Entity View	Base Entity	View	Hierarchy
Academic History	Complete	☑	View	Hierarchy
Academic Program	Complete	☑	View	Hierarchy
Admissions Evaluation Keys	Complete	☐	View	Hierarchy
Eval Management Auto Rtng Comp	Complete	☐	View	Hierarchy
Eval Management Cmt Evltr Rtng	Complete	☐	View	Hierarchy
Eval Management Cmte Evaluator	Complete	☐	View	Hierarchy
Eval Management Committee	Complete	☐	View	Hierarchy
Eval Management Committee Schm	Complete	☐	View	Hierarchy
Eval Management Ind Evltr Rtng	Complete	☐	View	Hierarchy
Eval Management Indv Evaluator	Complete	☐	View	Hierarchy
Eval Management Indv Scheme	Complete	☐	View	Hierarchy
External Academic Data	Complete	☑	View	Hierarchy
External Academic Summary	Complete	☑	View	Hierarchy
Student Evaluation	Complete	☑	View	Hierarchy
Student Evaluation Keys	Complete	☐	View	Hierarchy
Test CAF	Complete	☐	View	Hierarchy
Test Date	Complete	☐	View	Hierarchy
Test Score	Complete	☑	View	Hierarchy
Test Score Component	Complete	☐	View	Hierarchy
Thesis Evaluation Keys	Complete	☐	View	Hierarchy

Defining Rule Category Rule Groups

Access the Rule Category - Rule Groups page (Set Up SACR, System Administration, Rules Engine Setup, Define Categories, Rule Groups).

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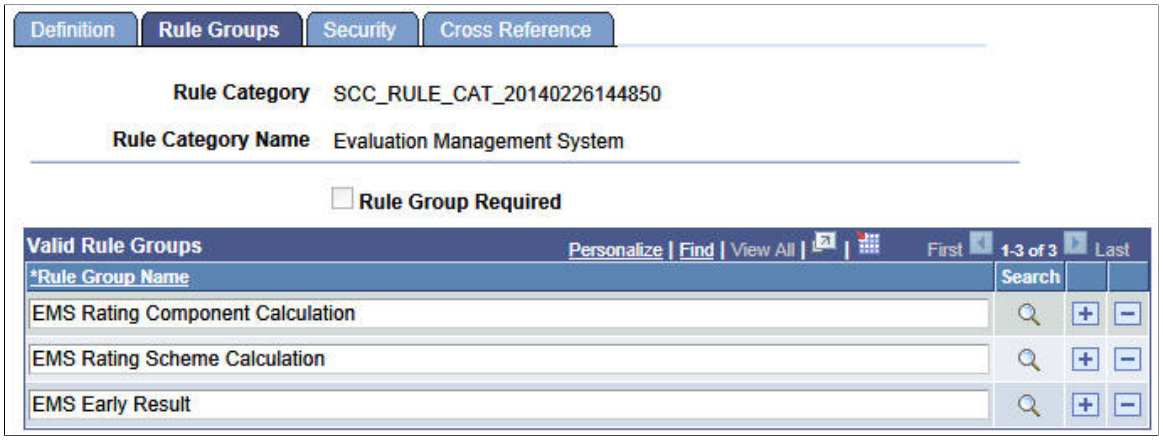
Bundle 34: Image updated

Image: Rule Category - Rule Groups page: Evaluation Management System

This example illustrates the fields and controls on the Rule Category - Rule Groups page for Evaluation Management System.



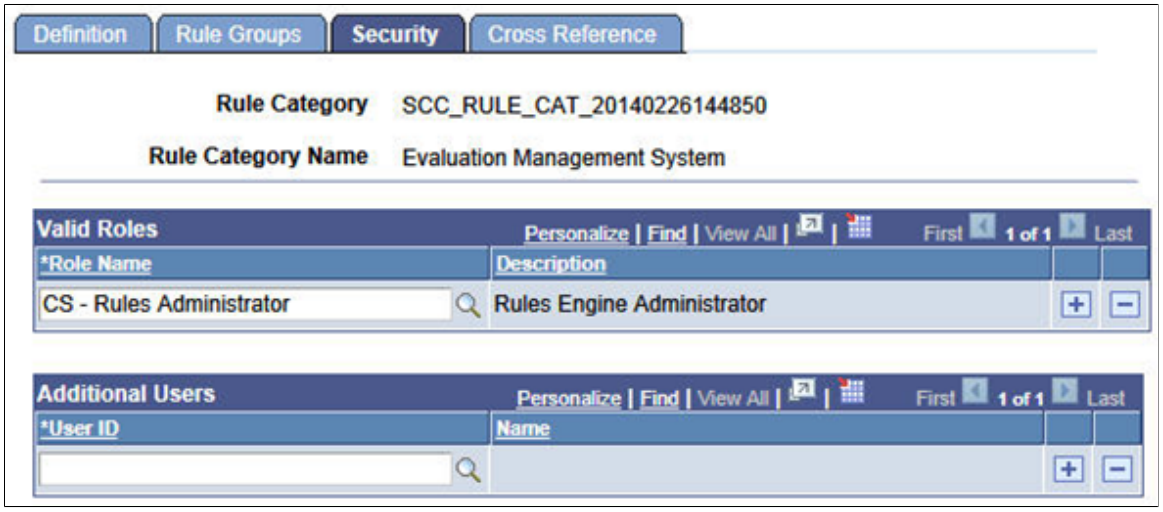
Rule Group Required If this check box is selected, users with this rule category must always create a rule from a rule group listed in the Valid Rule Groups grid.

Defining Rule Category Security

Access the Rule Category - Security page (Set Up SACR, System Administration, Rules Engine Setup, Define Categories, Security).

Image: Rule Category - Security page: Evaluation Management System

This example illustrates the fields and controls on the Rule Category - Security page for Evaluation Management System.



Security can be granted via role or by specific User ID.

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Note: The Evaluation Management System Rule Category has been delivered with a Valid Role value of *CS - Rules Administrator*. However while this Role Definition is delivered, you must associate it to User Profiles where appropriate.

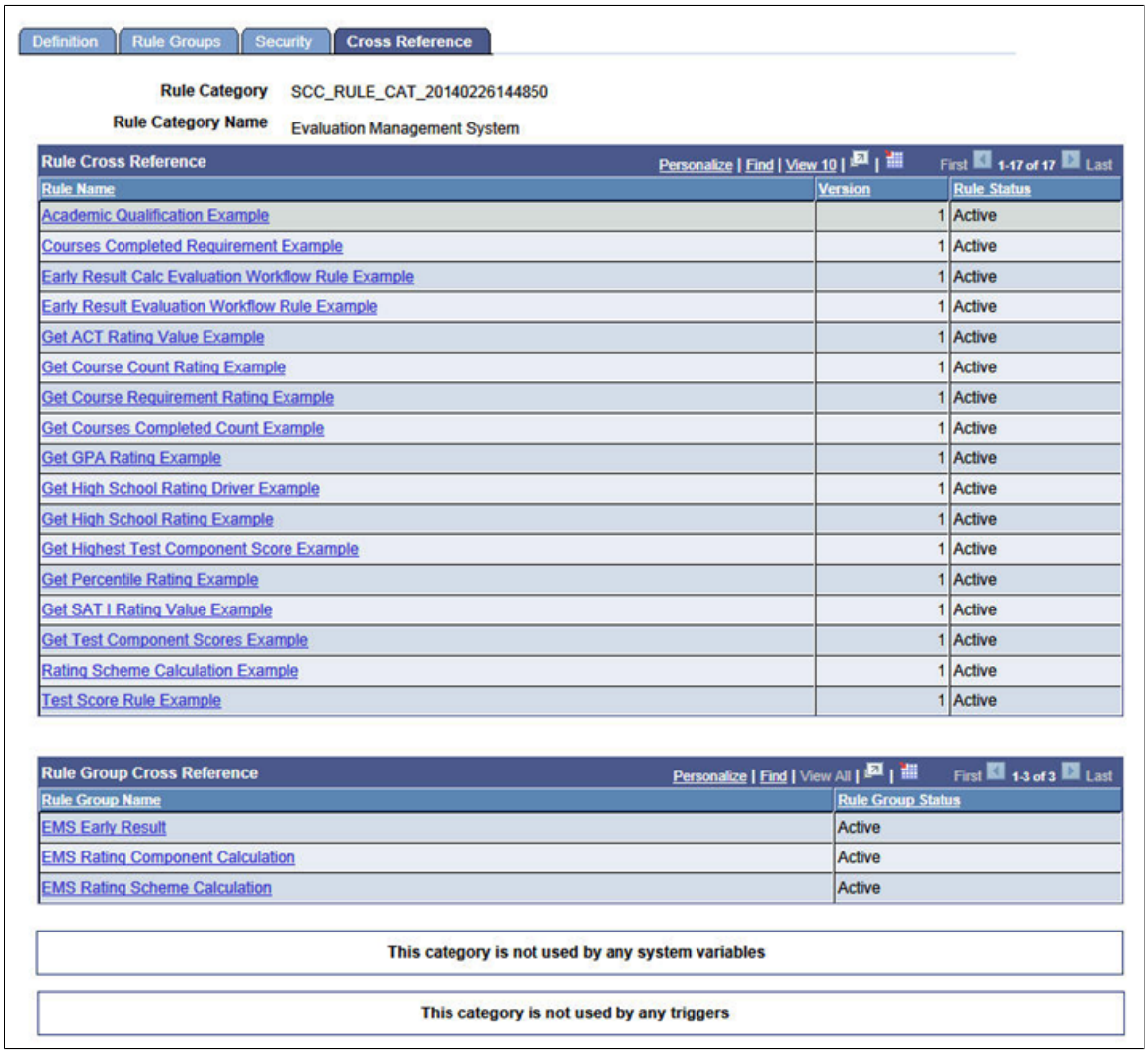
Viewing Rule Category Information

Access the Rule Category - Cross Reference page (Set Up SACR, System Administration, Rules Engine Setup, Define Categories, Cross Reference).

Bundle 34: Image updated

Image: Rule Category - Cross Reference page

This example illustrates the fields and controls on the Rule Category - Cross Reference page for Evaluation Management System.



Use the Cross Reference page to view rules, rule groups, system variables and triggers that use this rule category.

Related Links

Defining Rule Category Security

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Using Data Sets

Bundle 34: The EMS Evaluator Decision Info data set is added to this table

The following Data Set definitions are used in the delivered Rule Groups. The delivered data sets can be accessed in the Rules Engine Define Data Sets component: Set Up SACR, System Administration, Rules Engine Setup, Define Data Set.

Data Set ID	*Name*	*Long Description*	*Purpose*
SCC_ENTITY_ 20140226150042	EMS Evaluation Information	EMS Evaluation Information	This data set aggregates relevant information about the evaluation. Used to pass Evaluation data to rules.
SCC_ENTITY_ 20140226150400	EMS Evaluation Keys	EMS Evaluation Keys	This data set contains evaluation key data (for example: Evaluation Instance, EMPLID, INSTITUTION). Used to pass key data to rules in a generic fashion (for example, KEY_1, KEY_2, and so on). **Note:** EMPLID and INSTITUTION properties have been added to the EMS Evaluation Information Data Set to simplify access to those fields.
SCC_ENTITY_ 20140226150717	EMS Evaluation XRef Keys	EMS Evaluation Cross-Reference Keys	This data set contains the Cross-Reference Keys of the Evaluation. Used to pass key data to rules in a generic fashion (for example, KEY_1, KEY_2, and so on).
SCC_ENTITY_ 20140226152106	EMS Rating Component	EMS Rating Component	This data set contains Rating Component fields. Used to pass Rating Component Information to rules.
SCC_ENTITY_ 20140514150139	EMS Evaluator Decision Info	EMS Evaluator Decision Information	This data set contains fields pertaining to the Evaluator, Scheme, Overall Rating, recommendation for a Scheme.

Related Links

Setting Up Rules Engine Variables

Setting Up and Using Rule Groups

A rule group provides a way of grouping rules that share a common functional purpose. The rule group can serve as a template for creating a rule and determines how the rules that are based on it will operate.

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The Rule Group definition controls what the rule requires as inputs, that is, what types of data – what data elements – need to be passed into the rule in order for a determination to be made. Rule output is also determined by the rule group definition.

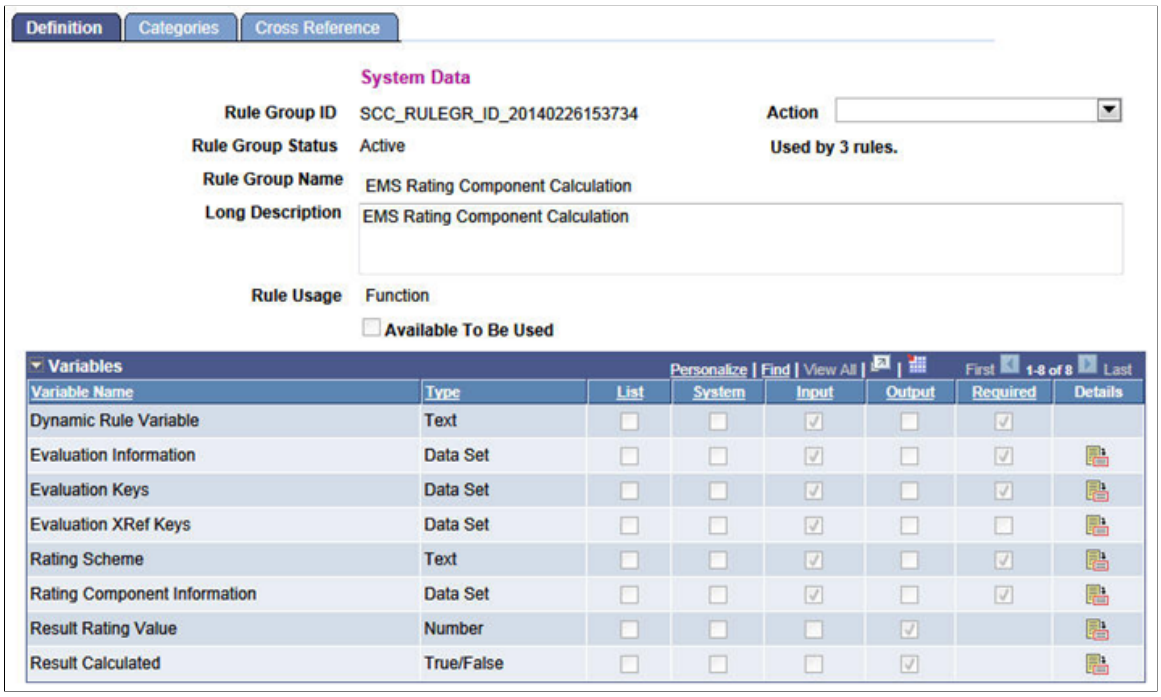
See Defining Rule Groups

The following Rule Group definitions can be accessed in the Rules Engine Rule Group component (Set Up SACR, System Administration, Rules Engine, Define Rule Groups).

EMS Rating Component Calculation Rule Group

Image: EMS Rating Component Calculation Rule Group

This example shows the Define Rule Group - Definition page for the EMS Rating Component Calculation Rule Group.



This Rule Group definition has been designed specifically for use in the creation of rules that will calculate a rating value for a Rating Component. When a rule using this Rule Group is invoked, the system populates the input variables with data from the evaluation that is being processed. The rule is responsible for setting values for the output variables *Result Rating Value* and *Result Calculated.* The *Result Rating Value* represents the Rating Value that has been calculated for the Rating Component. The *Result Calculated* variable indicates if the Rating Component should be updated with the *Result Rating Value* calculated by the rule. *Result Calculated* must be set to *True* in order for the Rating Component to be updated with the Rating Value calculated by the rule. The following variables are included in the Rule Group definition:

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Variable/Argument	***Description***
Dynamic Rule Variable	System created for all rule groups to facilitate usage of the *Dynamic Rule Group* statement by passing in the Rule ID that needs to be called. Value is blank and is not used for this rule group. See Defining Rule Category Security
Evaluation Information	Data Set containing general information about the evaluation being processed (Instance, Category, Code, Setup EFFDT, ID, and Institution). Populated automatically by the system.
Evaluation Keys	Data Set containing the main keys for an evaluation (for example, Key 1 = Instance, Key 2 = ID, Key 3 = Institution). Populated automatically by the system.
Evaluation XRef Keys	Data Set containing the Cross Reference Keys for an evaluation. For example, an Admissions Evaluation using the SCC_GE_XRF_APPL Cross reference record will have fields mapped as follows: • Key 1 = Instance • Key 2 = Academic Career • Key 3 = Student Career Number • Key 4 = Application Number • Key 5 = Application Program Number Populated automatically by the system.
Rating Scheme	The Rating Scheme in which the Rating Component resides. Populated automatically by the system.
Rating Component Information	Data Set containing the current values for the Rating Component being evaluated.
Result Rating Value	The rating value calculated by the rule for the Rating Component. Defaults to zero. The rule is responsible for populating this variable.

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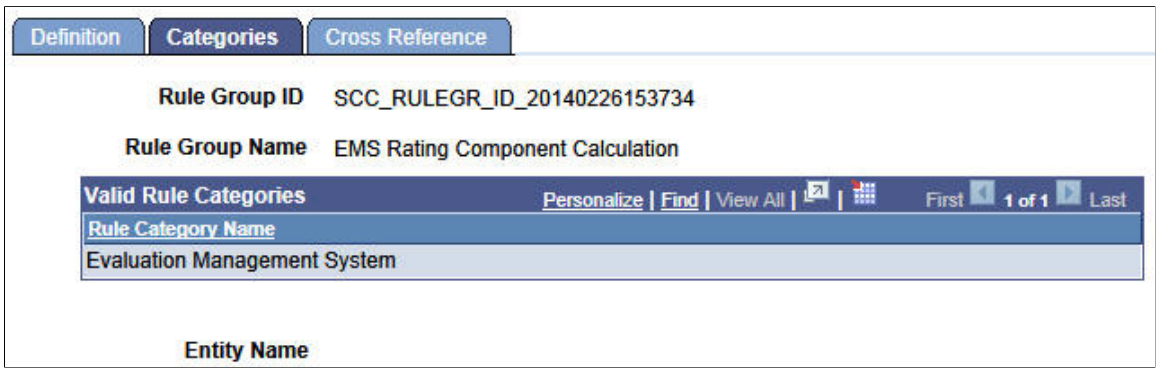
Variable/Argument	*Description*
Result Calculated	True/False indicator which the rule is responsible for setting. Defaults to False. If the rule returns a value of False, the Rating Component will not be updated (for example, the existing Rating Value for the Rating Component will not change). If the rule returns a value of True, and the value in Result Rating Value is valid, the Rating Component will be updated (for example, the Rating Value for the Rating Component will be updated with the value returned in the Result Rating Value variable.)

A Rule Group also determines the data that can be accessed by a rule, according to the rule categories that are associated with it. A Rule Group must be associated with at least one Rule Category. The EMS Rating Component Calculation Rule Group has been associated with the delivered Rule Category *Evaluation Management System* and is therefore subject to the Entity Profile System Profile EMS.

Image: Define Rule Groups - Categories page (EMS Rating Component Calculation)

This example shows the Define Rule Groups - Categories page for the EMS Rating Component Calculation rule group.



It is intended that this delivered Rule Group is used by users to create rules that calculate rating value results for rating components that are part of an EMS calculated rating scheme.

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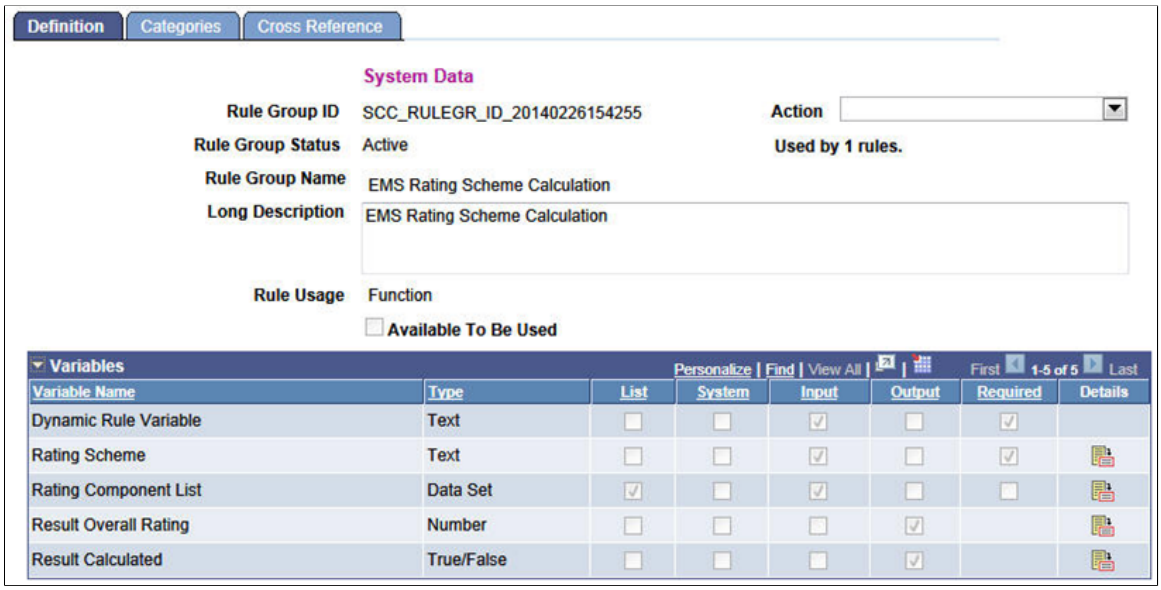
EMS Rating Scheme Calculation Rule Group

Image: EMS Rating Scheme Calculation Rule Group

This example shows the Define Rule Group - Definition page for the EMS Rating Scheme Calculation Rule Group.



This Rule Group definition has been designed specifically for use in the creation of rules that will calculate the overall rating value for a Rating Scheme based on the rating component rating values. When a rule using this rule group is invoked, the system populates the input variables with data from the evaluation that is being processed. The rule is responsible for setting values for the output variables *Result Overall Rating* and *Result Calculated.* The *Result Overall Rating* represents the Overall Rating that has been calculated for the Rating Scheme. The *Result Calculated* variable indicates if the rating scheme should be updated with the *Result Overall Rating* calculated by the rule. *Result Calculated* must be set to *True* in order for the Rating Scheme to be updated with the Overall Rating calculated by the rule. The following variables are included in the Rule Group definition:

Variable/Argument	***Description***
Dynamic Rule Variable	System created for all rule groups to facilitate usage of the *Dynamic Rule Group* statement by passing in the Rule ID that needs to be called. Value is blank and is not used for this rule group. See Defining Rule Category Security
Rating Scheme	The Rating Scheme being evaluated. Populated automatically by the system.
Rating Component List	A list of Rating Component Information Data Sets. Each entry in the list represents a Rating Component that is in the Rating Scheme. Populated automatically by the system.

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Variable/Argument	*Description*
Result Overall Rating	The Overall Rating calculated by the rule for the Rating Scheme. Defaults to zero. The rule is responsible for populating this variable.
Result Calculated	True/False indicator which the rule is responsible for setting. Defaults to False. If the rule returns a value of False, the Overall Rating for the Rating Scheme will not be updated (for example, the existing Overall Rating will not change). If the rule returns a value of True, the Overall Rating for the Rating Scheme will be updated (for example, the Overall Rating will be changed to the value returned in the *Result Overall Rating* variable.

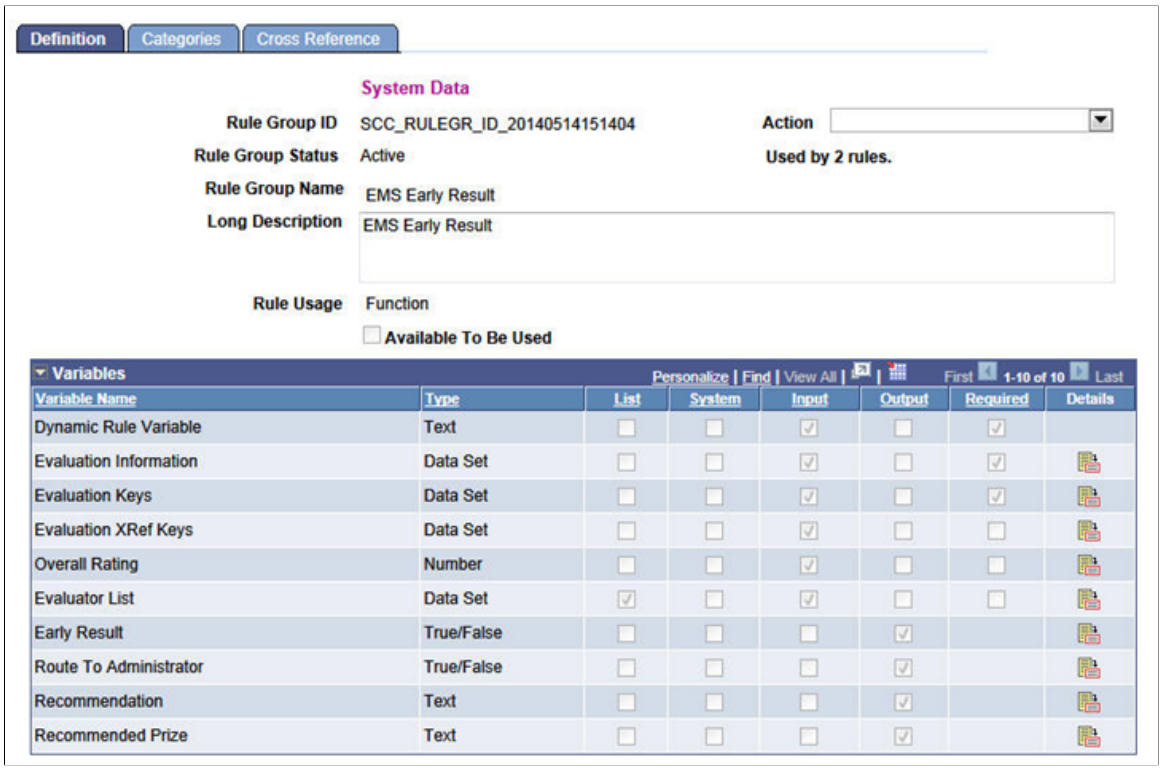
It is intended that this delivered Rule Group is used by users to create rules that calculate the overall rating value for an EMS calculated rating scheme.

EMS Early Result Rule Group

Bundle 34: new section

Image: EMS Early Result Rule Group

This example shows the Define Rule Group - Definition page for the EMS Early Result Rule Group.



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This Rule Group definition has been designed specifically for use in evaluating the result at a specific order in the evaluation to determine whether the workflow should stop or continue. When a rule using this rule group is invoked, the system will populate the input variables with data from the evaluation that is being processed. The rule is responsible for setting values for the output variables *Early Result, Route to Administrator, Recommendation,* and *Recommend Prize*. The following variables are included in the Rule Group definition:

Variable/Argument	***Description***
Dynamic Rule Variable	System created for all rule groups to facilitate usage of the *Dynamic Rule Group* statement by passing in the Rule ID that needs to be called. Value is blank and is not used for this rule group. See Defining Rule Category Security
Evaluation Information	Data Set containing general information about the evaluation being processed (Instance, Category, Code, Setup EFFDT, ID, and Institution). Populated automatically by the system.
Evaluation Keys	Data Set containing the main keys for an evaluation (such as Key 1 = Instance, Key 2 = ID, Key 3 = Institution). Populated automatically by the system.
Evaluation XRef Keys	Data Set containing the Cross Reference Keys for an evaluation. For example, an Admissions Evaluation using the SCC_GE_XRF_APPL cross reference record will have fields mapped as follows: Key 1 = Instance Key 2 = Academic Career Key 3 = Student Career Number Key 4 = Application Number Key 5 = Application Program Number Populated automatically by the system.
Overall Rating	The Overall Rating value from an evaluator (or committee member) result or from a scheme level result.
Evaluator List	A variable defined from the EMS Evaluator Decision Info Data Set. Aggregates all evaluators in the evaluation along with certain fields that can help determine the evaluation outcome.

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Variable/Argument	*Description*
Early Result	True/False indicator; the rule is responsible for setting. Defaults to *False*. If the rule returns a value of *False*, the workflow for the evaluations continues, creating worklist items and notifications (if set up) for the next evaluators in the order. If the rule returns a value of *True*, the workflow ceases; it creates no further worklist items or notifications. All remaining levels in the evaluation are greyed. The values indicated in the rule for Recommendation and Recommend Prize are populated at the high level of the evaluation (Evaluation Overview page in the Manage Evaluation component and the Evaluation Status is set to *Final*).
Route to Administrator	True/False indicator; the rule is responsible for setting. Defaults to *False*. Use this variable if the Early Result variable = *True*. While remaining levels of the evaluation are closed down, you do want the Evaluation Administrator to review. If the rule returns a value of *False*, no further action occurs and the evaluation is finalized. If the rule returns a value of *True*, a worklist item is created for the administrator and a notification can be sent. Recommendation and Recommend Prize fields will be populated if specified in the rule but not greyed down. The Evaluation Status field remains as set as determined for the Assigned default value in the Evaluation Code setup (in other words not changed to the Default for 'final' status).
Recommendation	The rule is responsible for setting this output variable. The value specified in the rule populates the Recommendation field on the Evaluation Overview page in the Manage Evaluation component.
Recommend Prize	The rule is responsible for setting this output variable. The value specified in the rule populates the Recommend Prize field on the Evaluation Overview page in the Manage Evaluation component.

Using Sample Rules

Bundle 34: Text throughout this section is updated

Oracle has delivered seventeen sample rules based on the Rule Category described above. Three of those rules are based on the Rule Group EMS Rating Component Calculation; one is based on the Rule Group EMS Rating Scheme Calculation and two are based on the Early Result Rule Group. The rules are intended as examples that you can take and clone or rebuild under your own Rules Engine Category as you begin to assess how you can implement and leverage Rules Engine functionality in Evaluation Management System. The sample rules delivered as system data represent a simple use case for an

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admissions evaluation to demonstrate how a calculated rating scheme might be used to automate an evaluation.

Note: These rules use Campus Solutions sample data: you will need to modify values to use the rules. See the Modifying and Using System Data Rules section later in this topic.

The sample rules can be accessed using the Rules Engine Manager Component (Set Up SACR, System Administration, Rules Engine Manager).

In our examples for the Rating Component Calculation and Rating Scheme Calculation rule groups, there are four main rules which call other rules:

- Academic Qualification Example
- Courses Completed Requirement Example
- Test Score Rule Example
- Rating Scheme Calculation Example

For the Early Result Rule group, we have provided two sample rules:

- Early Result Calc Evaluation Workflow Rule Example
- Early Result Evaluation Workflow Rule Example

Below we take a closer look at a rule from the Rating Component Calculation rule group and the Early Result rule group to see how the rules may be compromised.

SCC_RULE_ID_20140303114951 Test Score Rule Example - Rating Component Calculation Rule Group

This rule returns a rating value for the rating component based on the highest score value in a comparison of ACT scores and SAT 1 scores. Calls a number of rules to get the scores from the test score records, evaluate those results against a rating scale to obtain the rating value to populate the rating component. Rules called from the Test Score Rule Example are:

```
└ SCC_RULE_ID_20140226160705 Get Highest Test Component Score
   └ SCC_RULE_ID_20140226155857 Get Test Component Scores

└ SCC_RULE_ID_20140304120320 Get ACT Rating Value

└ SCC_RULE_ID_20140304121526 Get SAT 1 Rating Value
```

Rule Evaluation Calculation Statement	*Process Description/Definition*
CALL Function Get Highest Test Component Score passing in Evaluation Information.ID as in_EMPLID, ACT as in_TEST_ID, COMP as in_TEST_COMPONENT returning out_Highest _Score as highest_ACT_Score	Calls the function ‘Get Highest Test Component Score’ passing in values for EMPLID, TEST_ID and TEST_COMPONENT. In this case the function returns the Highest ACT Composite score for the EMPLID.
CALL Function Get Highest Test Component Score passing in Evaluation Information.ID as in_EMPLID, SAT 1 as in_TEST_ID, MATH as in_TEST_COMPONENT returning out_Highest_Score as highest_SAT_1_MATH_Score	Calls the function ‘Get Highest Test Component Score’ passing in values for EMPLID, TEST_ID and TEST_COMPONENT. In this case the function returns the Highest SAT 1 Math score for the EMPLID.

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Rule Evaluation Calculation Statement	*Process Description/Definition*
CALL Function Get Highest Test Component Score passing in Evaluation Information.ID as in_EMPLID, SAT 1 as in_TEST_ID, VERB as in_TEST_COMPONENT returning out_Highest_Score as highest_SAT_1_VERB_Score	Calls the function 'Get Highest Test Component Score' passing in values for EMPLID, TEST_ID and TEST_COMPONENT. In this case the function returns the Highest SAT 1 Verbal score for the EMPLID.
CALL Function Add passing in highest_SAT_1_MATH_Score as Value 1, highest_SAT_1_VERB_Score as Value 2 returning Result as SAT_1_Total	Calls the function 'Add' passing in the Highest SAT 1 Math score and the Highest SAT 1 Verbal score to calculate a SAT 1 Total score.
CALL Function Get ACT Rating Value passing in highest_ACT_Score as in_ACT_Score returning out_Rating as ACT_Rating	Calls the function 'Get ACT Rating Value' passing in the Highest ACT Composite score. The function returns an ACT Rating based on the score passed in.
CALL Function Get SAT 1 Rating Value passing in SAT_1_Total as in_SAT_1_Total returning out_Rating as SAT_1_Rating	Calls the function 'Get SAT 1 Rating Value' passing in the SAT 1 Total score. The rule returns a SAT 1 Rating based on the score passed in.
IF ACT_Rating > SAT_1_RATING | - ASSIGN Result Rating Value = ACT_Rating ELSE IF ACT_Rating > SAT_1_Rating | - ASSIGN Result Rating Value = SAT_1_Rating	If the ACT Rating is greater than the SAT 1 Rating, the ACT Rating is assigned to the Result Rating Value output variable. Otherwise, the SAT 1 Rating is assigned to the Result Rating Value output variable.
ASSIGN Result Calculated = True	The Result Calculated output variable is set to True to indicate the rule has successfully calculated a value for the Result Rating Value output variable.

SCC_RULE_ID_20140226160705 - Get Highest Test Component Score Example

Rule Evaluation Calculation Statement	*Process Description/Definition*
CALL Rule Get Test Component Scores passing in in_EMPLID as in_EMPLID, in_TEST_ID as in_TEST_ID, in_TEST_COMPONENT as in_TEST_COMPONENT returning out_Test_Score_list as test_score_list	Calls the rule 'Get Test Component Scores' passing in the EMPLID, TEST_ID and TEST_COMPONENT. A list of Test Scores is returned. If no test scores of this type are found for the EMPLID an empty list will be returned.
CALL Function Max passing in test_score_list as List of Values returning Maximum as out_Highest_Score	Calls the function Max passing in a list of Test Scores. The function returns the maximum test score in the list. The function returns zero if the test score list is empty.

SCC_RULE_ID_20140226155857 - Get Test Component Scores Example

Rule Evaluation Calculation Statement	*Process Description/Definition*
CLEAR LIST Using List out_Test_Score_list	Initializes the Test Score List output variable to empty.

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Rule Evaluation Calculation Statement	*Process Description/Definition*
FOR EACH Test Score Component - Process Immediate Children Only	Loop through each Test Score Component that is returned based on the statements in the Criteria section of this rule.
| - IF Test Score Component.Test Component = in_TEST_COMPONENT | | - ADD TO LIST Using List out_Test_Score_list Value Test Score Component.Test Score	If the Test Component is equal to the value in the Test Component input variable, add the Test Score to the Test Score List output variable.

SCC_RULE_ID_20140304120320 - Get ACT Rating Value Example

Rule Evaluation Calculation Statement	*Process Description/Definition*
IF in_ACT_Score > 0 | - IF in_ACT_Score >= 35 | | - ASSIGN out_Rating = 35 | - ELSE *IF in_ACT_Score >= 35* | | - IF in_ACT_Score >= 30 | | | - ASSIGN out_Rating = 30 | | - ELSE *IF in_ACT_Score >= 30* | | | - IF in_ACT_Score >= 25 | | | | - ASSIGN out_Rating = 25 | | | - ELSE *IF in_ACT_Score >= 25* | | | | - IF in_ACT_Score >= 20 | | | | | - ASSIGN out_Rating = 20 | | | | - ELSE *IF in_ACT_Score >= 20* | | | | | - IF in_ACT_Score >= 15 | | | | | | - ASSIGN out_Rating = 15 | | | | | - ELSE *IF in_ACT_Score >= 15* | | | | | | - ASSIGN out_Rating = 10	Calculates a Rating Value based on the ACT Score input variable by using a series of IF/ELSE statements. The function returns a rating when the ACT Score is greater than zero. Otherwise, the function returns zero.

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SCC_RULE_ID_20140304121526 - Get SAT 1 Rating Value Example

Rule Evaluation Calculation Statement	***Process Description/Definition***
IF in_SAT_1_Total > 0 And in_SAT_1_Total <= 1600 | - IF in_SAT_1_Total >= 1400 | | - ASSIGN out_Rating = 35 | - ELSE *IF in_SAT_1_Total >= 1400* | | - IF in_SAT_1_Total >= 1300 | | | - ASSIGN out_Rating = 30 | | - ELSE *IF in_SAT_1_Total >= 1300* | | | - IF in_SAT_1_Total >= 1200 | | | | - ASSIGN out_Rating = 25 | | | - ELSE *IF in_SAT_1_Total >= 1200* | | | | - IF in_SAT_1_Total >= 1100 | | | | | - ASSIGN out_Rating = 20 | | | | - ELSE *IF in_SAT_1_Total >= 1100* | | | | | - IF in_SAT_1_Total >= 1000 | | | | | | - ASSIGN out_Rating = 15 | | | | | - ELSE *IF in_SAT_1_Total >= 1000* | | | | | | - ASSIGN out_Rating = 10	Calculates a Rating Value based on the SAT 1 Total input variable by using a series of IF/ELSE statements. The function returns a rating when the total is greater than zero and less than or equal to 1600. Otherwise, the function returns zero.

SCC RULE ID 20140519124427 Early Result Evaluation Workflow Rule Example - Rating Component Calculation Rule Group

Bundle 34: new section

This rule can return an Early Result variable value of *True* based on the outcomes of the segment of the evaluation using Overall Rating and Recommendation values as the determinant.

Rule Evaluation Calculation Statement	***Process Description/Definition***
LENGTH OF LIST Using List Evaluator List Returning Length in evaluatorCount	Returns a count of evaluators in the evaluation.
IF evaluatorCount > 0	From the EvaluatorList results, if evaluator count is greater than 0, then proceed in evaluating the evaluator types and accompanying conditions.

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Rule Evaluation Calculation Statement	*Process Description/Definition*
| - FOR EACH Evaluator List | | - ASSIGN Evaluator = Evaluator List | | - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And Evaluator.Overall Rating >= 30 | | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = ADMIT, Recommended Prize = MCL | | - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And Evaluator.Overall Rating <= 10 | | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = DENY | | | - EXIT FOR EACH | | - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluator.Recommendation = ADMIT | | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = ADMIT | | - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluator.Recommendation = DENY | | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = DENY | | | - EXIT FOR EACH | | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluator.Overall Rating >= 35 And Evaluator.Recommendation = ADMIT | | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = ADMIT, Recommended Prize = DEANLS | | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluator.Overall Rating <= 15 And (Evaluator.Recommendation = DENY Or Evaluator. Recommendation = WAITLIST) | | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = DENY | | | - EXIT FOR EACH	Using a series of IF statements evaluates the statement conditions to return the Early Result value, Recommendation and Recommend Prize values when met.

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Rules Belonging to the Evaluation Management System Category

Bundle 34: Two new rules are added to this table

Rule ID	*Name*	*Long Description*
SCC_RULE_ID_20140306170755	Rating Scheme Calculation Example	This rule can be used at the Evaluation Rating Scheme level as an alternate calculation of the Overall Rating value for the scheme. This example returns the sum of the component rating values.
SCC_RULE_ID_20140303114951	Test Score Rule Example	This rule returns a rating value for the rating component based on the highest score value in a comparison of ACT scores and SAT 1 scores. Calls a number of rules to get the scores from the test score records, evaluate those results against a rating scale to obtain the rating value to populate the rating component.
SCC_RULE_ID_20140306173039	Academic Qualification Example	This rule returns a rating value to the rating component based on education data fields of percentile rank and converted GPA contained in External Academic Summary. Calls a number of other rules which get the GPA and percentile values, evaluate those results against a rating scale to obtain the rating value to populate the rating component.
SCC_RULE_ID_20140306172622	Courses Completed Requirement Example	This rule returns a rating value to the rating component based on a count of completed subjects in External Academic Subjects.
SCC_RULE_ID_20140304120320	Get ACT Rating Value Example	Returns the rating value for an ACT score.
SCC_RULE_ID_20140306141320	Get Course Count Rating Example	Gets the rating value for Course Count.
SCC_RULE_ID_20140306143945	Get Course Requirement Rating Example	Returns a rating value based on the number of Courses Completed for all Academic History entries that have External Academic Data rows where External Career = HS and Transcript Type = OFF.
SCC_RULE_ID_20140306161125	Get Courses Completed Count Example	Returns a count of completed courses in External Academic Subjects.

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Rule ID	*Name*	*Long Description*
SCC_RULE_ID_20140304123947	Get GPA Rating Example	Returns the rating value for a GPA.
SCC_RULE_ID_20140304162158	Get High School Rating Example	Gets the highest rating value of the Converted GPA and Percentile values and passes to Get High School Rating Driver rule.
SCC_RULE_ID_20140304170413	Get High School Rating Driver Example	Loops through External Academic Data where External Career = HS for an EMPLID and calls Get High School Rating. Returns the highest High School Rating.
SCC_RULE_ID_20140226160705	Get Highest Test Component Score Example	Returns the highest score for the specified EMPLID, TEST_ID, and TEST _COMPONENT.
SCC_RULE_ID_20140304155504	Get Percentile Rating Example	Returns the rating value for a Percentile Rank.
SCC_RULE_ID_20140304121526	Get SAT 1 Rating Value Example	Returns a rating value for a SAT 1 Test Score Total.
SCC_RULE_ID_20140226155857	Get Test Component Scores Example	Returns a list of test component scores for the specified EMPLID, TEST_ID and TEST_COMPONENT.
SCC_RULE_ID_20140604075859	Early Result Calc Evaluation Workflow Rule Example	Early Result Calc Evaluation Workflow Rule Example – multiple schemes including a calculated scheme.
SCC_RULE_ID_20140519124427	Early Result Evaluation Workflow Rule Example	Early Result Evaluation Workflow Rule Example

Evaluation Management Rules Engine Rule Hierarchy for rules in the Rating Component Calculation Rule Group

Bundle 34: This title is updated

SCC_RULE_ID_20140306173039 Academic Qualification Example

```
└ SCC_RULE_ID_20140304170413 Get High School Rating Driver
   └ SCC_RULE_ID_20140304162158 Get High School Rating
      └ SCC_RULE_ID_20140304123947 Get GPA Rating
      └ SCC_RULE_ID_20140304155504 Get Percentile Rating
```

SCC_RULE_ID_20140306172622 Courses Completed Requirement Example

```
└ SCC_RULE_ID_20140306143945 Get Course Requirement Rating
   └ SCC_RULE_ID_20140306161125 Get Courses Completed Count
   └ SCC_RULE_ID_20140306141320 Get Course Count Rating
```

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SCC_RULE_ID_20140303114951 Test Score Rule Example

```
└ SCC_RULE_ID_20140226160705 Get Highest Test Component Score
   └ SCC_RULE_ID_20140226155857 Get Test Component Scores
└ SCC_RULE_ID_20140304120320 Get ACT Rating Value
└ SCC_RULE_ID_20140304121526 Get SAT 1 Rating Value
```

Evaluation Management System/Rules Engine Integration: Rating Component Calculation and Rating Scheme Calculation Rule Groups

Bundle 34: Title is updated

In the Rating Scheme setup (Set Up SACR, Common Definitions, Evaluation Management System, Define Rating Scheme), when a rating scheme is indicated as used for auto-calculations, you can associate the rating scheme with a rule which can calculate the Overall Rating for the scheme. You can also associate a rule to each rating component in the scheme to calculate a rating result for the component.

See Defining Rating Schemes

When a user creates an evaluation in the Manage Evaluation component, at the save, the rules designated in the rating scheme setup are invoked. If data needed for each rule exists in the system, a rating value can be returned and populated for each rating component. Additionally, if each required rating component has a rating result populated, the rating scheme rule can be invoked, populating the Overall Rating value. Each time the Manage Evaluation component is saved the rules are invoked, re-evaluating the Calculated Scheme. If, initially, data was not present in the system for a rule to act on, when that data is populated and the Manage Evaluation component is saved, the rule will be invoked, now populating that rating component rating value. If data has changed, the rules will rerun updating the rating results. The SCC_GE_CALC process can also be run to populate and recalculate rating values rather than relying on manually performing saves in the Manage Evaluation component. This process is separate from the Rules Engine batch process and is specific to Evaluation Management. You can find the SCC_GE_CALC process by navigating to PeopleTools, Process Scheduler, System Process Requests. You can also schedule this process to run on frequency to meet your needs.

For more information on how to run the process:

See the product documentation for *PeopleTools: PeopleSoft Process Scheduler*, "Submitting and Scheduling a Process Request"

Functional Scenario

A Rating Scheme is defined for use with Auto-Calculations. It includes three Rating Components, each of which is associated to a Rule. In this setup configuration, there is no rule identified for the Rating Scheme

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itself, so for the evaluations using this scheme, the Overall Rating value on the transaction pages will be calculated by the record PeopleCode.

Image: Define Rating Scheme page (1 of 2): Rules Engine integration example

This image shows the Define Rating Scheme page (1 of 2): Rules Engine integration example.

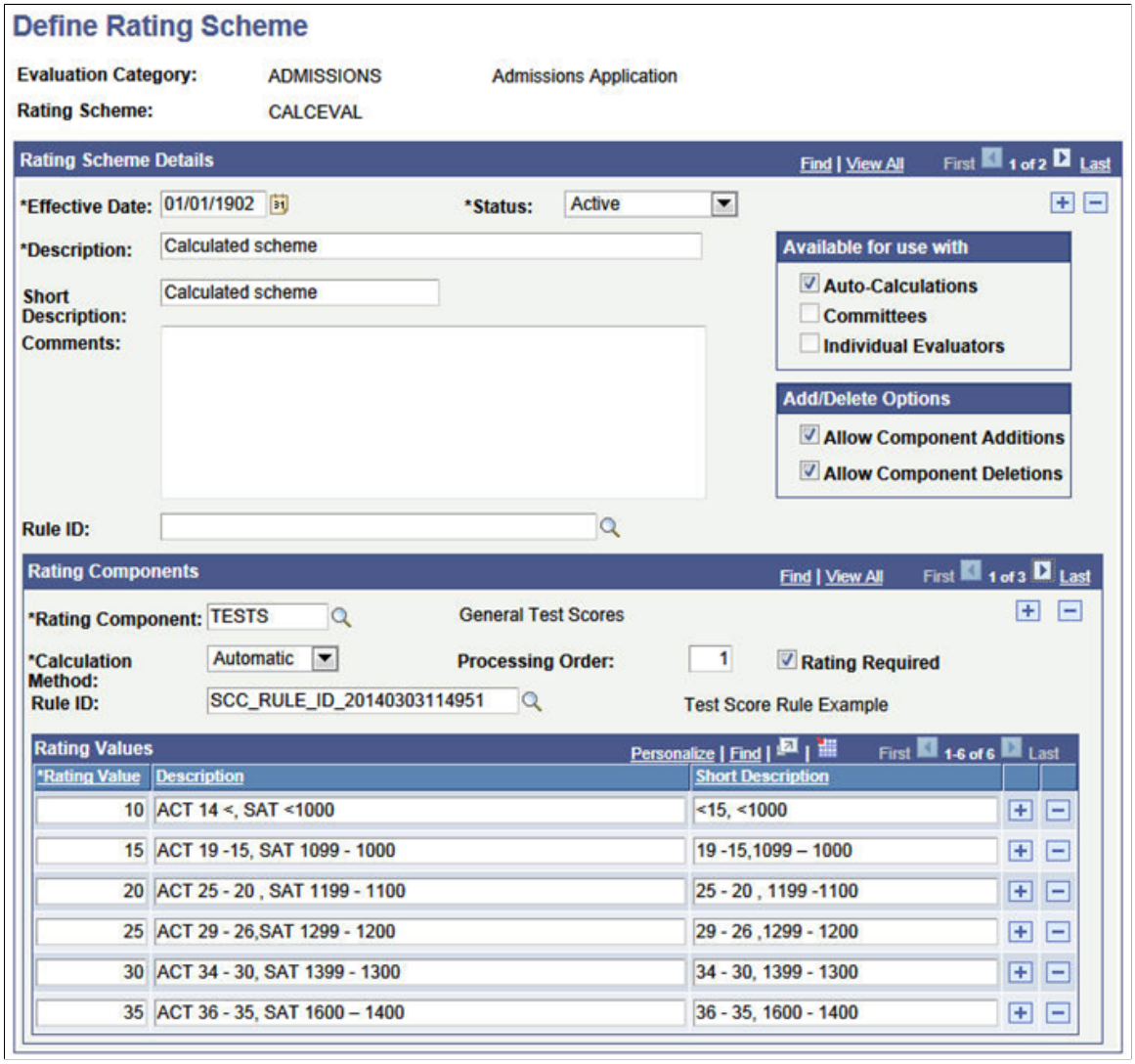

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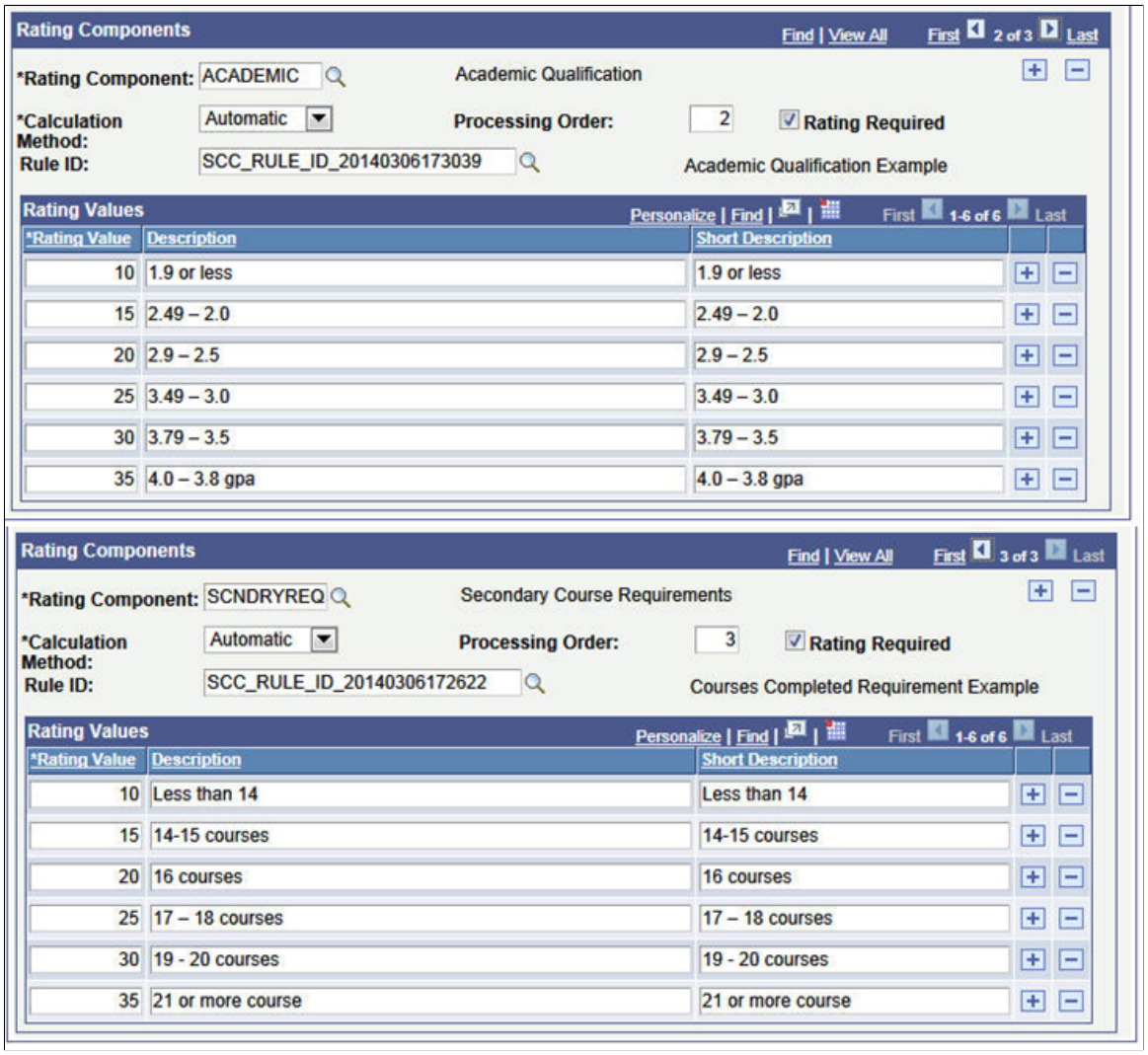
Image: Define Rating Scheme page (2 of 2) Rules Engine integration example

This image shows the Define Rating Scheme page (2 of 2): Rules Engine integration example.



Note: The rating values specified are used for validation purposes and to derive the description values. Rating values must also be present in the rule itself for calculation purpose.

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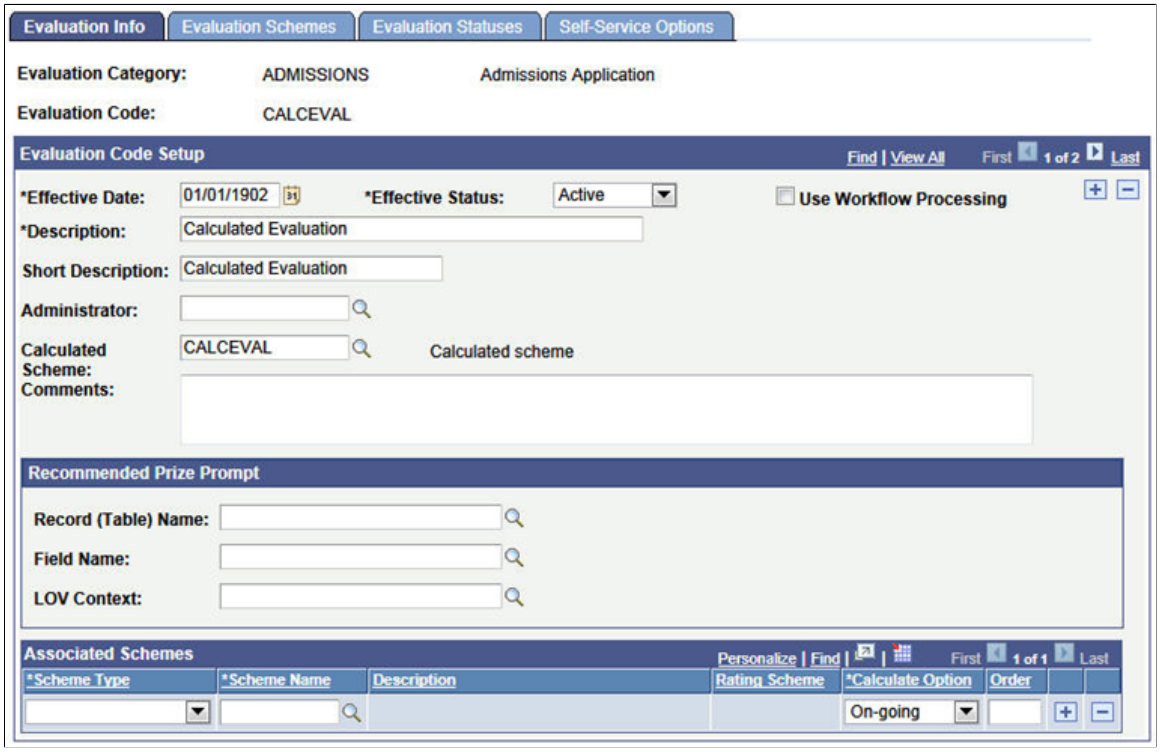
That Rating Scheme is associated with an Evaluation Code. This code is set up to only use a Calculated Scheme; there are no other schemes included in this setup.

Image: Evaluation Info page: Rules Engine integration example

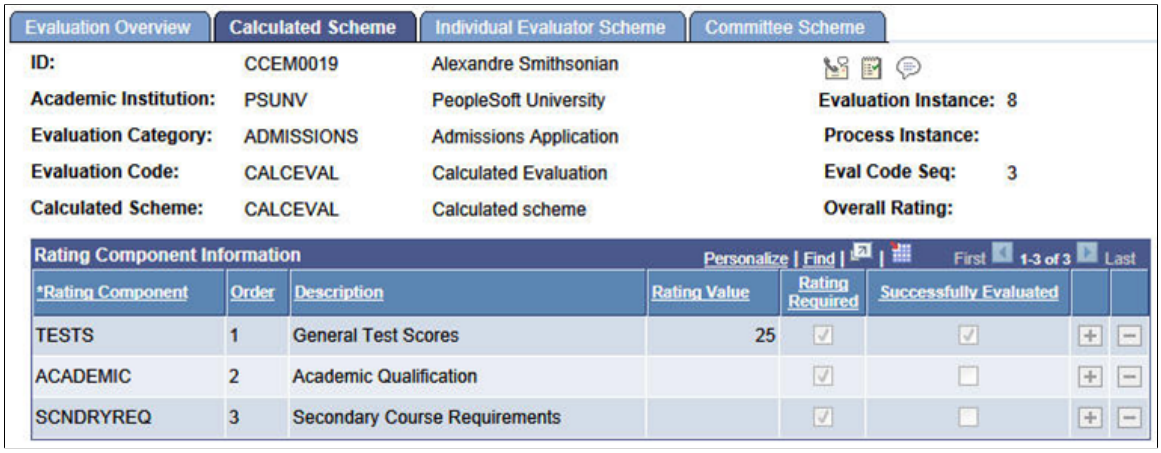
This image shows the Evaluation Info page: Rules Engine integration example.



An Evaluation is manually created for EMPLID CCEM0019. At the time of the Evaluation creation, only the Test Score data exists in the system for this ID. At the save of the Manage Evaluation component, the rule linked to the TESTS component is invoked and a value is returned to that rating component:

Image: Calculated Scheme page: Rules Engine integration example

This images shows the Calculated Scheme page: Rules Engine integration example.



In this example, ID CCEM0019 has the following Test Score data: ACT COMP score of 15, SAT 1 VERB of 600, MATH of 600. The Test Score example rule evaluates the scores, derives a rating of value of 15 for the ACT COMP score and a rating value of 25 for the total of the SAT 1 VERB and

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MATH scores. Since the SAT 1 total results in a higher rating value, that value is returned to the rating component.

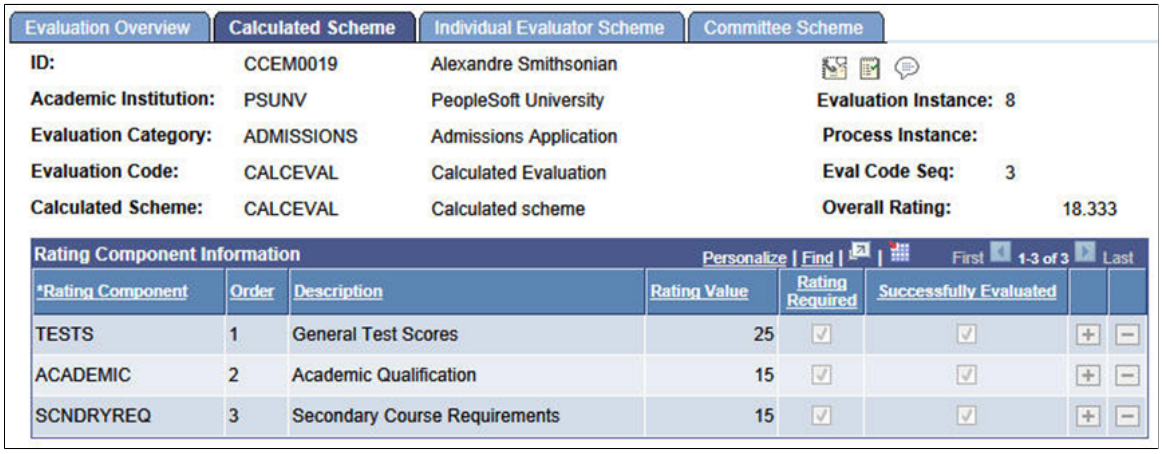
Note: This same action/activity occurs when using the Create/Maintain Evaluations batch process to create evaluations.

Sometime later the data needed to calculate the other rating components is entered in the system. In this example that is Education data which includes GPA, Percentile Rank and External Subject details.

The SCC_GE_CALC process runs (you can schedule this to run as frequently as needed according to your business needs). The rules for the ACADEMIC and SCNDRYREQ components are invoked and rating values are returned by the batch process for those components. Because all required rating component values are present, the Overall Rating is also calculated:

Image: Calculated Scheme page: Rules Engine integration example 2

This image shows the Calculated Scheme page: Rules Engine integration example 2.



The Academic rating value results from a calculation of the Education Data converted GPA and/or Percentile Rank. In our scenario, ID CCEM0019 has the following data:

- Converted GPA = 2.0
- Percentile Rank = 30%

The Academic Qualification rule determines that the Percentile Rank has a higher rating value and returns that value to the rating component.

The SCNDRYREQ rating value results from a count of External Subject completed courses. In our scenario, ID CCEM0019 has a total of 18 external subject completed courses. The SCNDRYREQ rule counts the number of courses completed and applies the rating scale to that number and returns a rating value to the rating component.

In this example above, because no rule was associated for the rating scheme, the Overall Rating is derived by PeopleCode and produces an average of the rating values.

Because this evaluation has not been determined to be final, if there are changes to the underlying data, the rules can be executed again to pick up those changes and do a recalculation. Let us say in this scenario higher ACT scores are received. The COMP score value is 36. The SCC_GE_CALC process is run and

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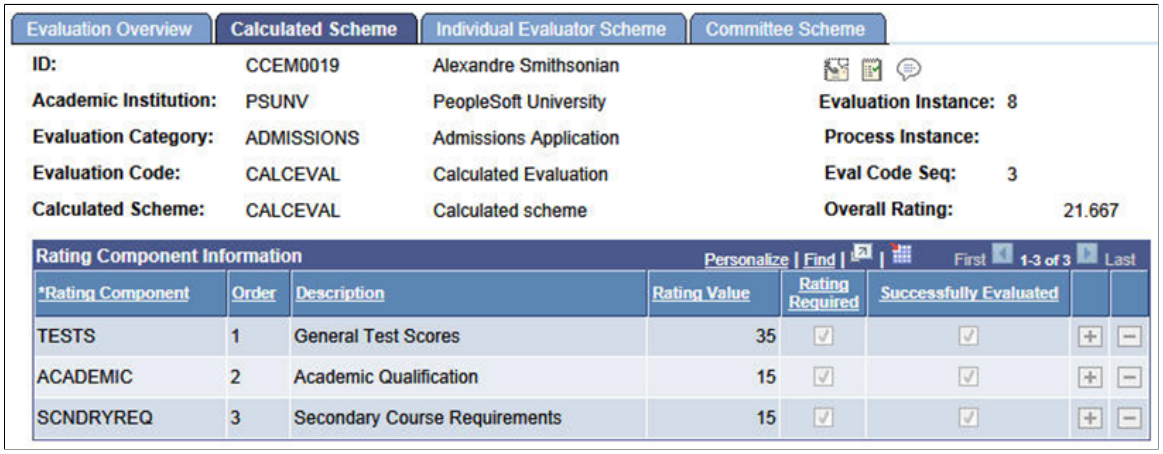
the newer score picked up and the TESTS rating component value is recalculated based on that score. The Overall Rating value is also recalculated:

Image: Calculated Scheme page: Rules Engine integration example 3

This images shows the Calculated Scheme page: Rules Engine integration example 3



After the Evaluation Status is set to *Final,* no additional re-calculations will occur.

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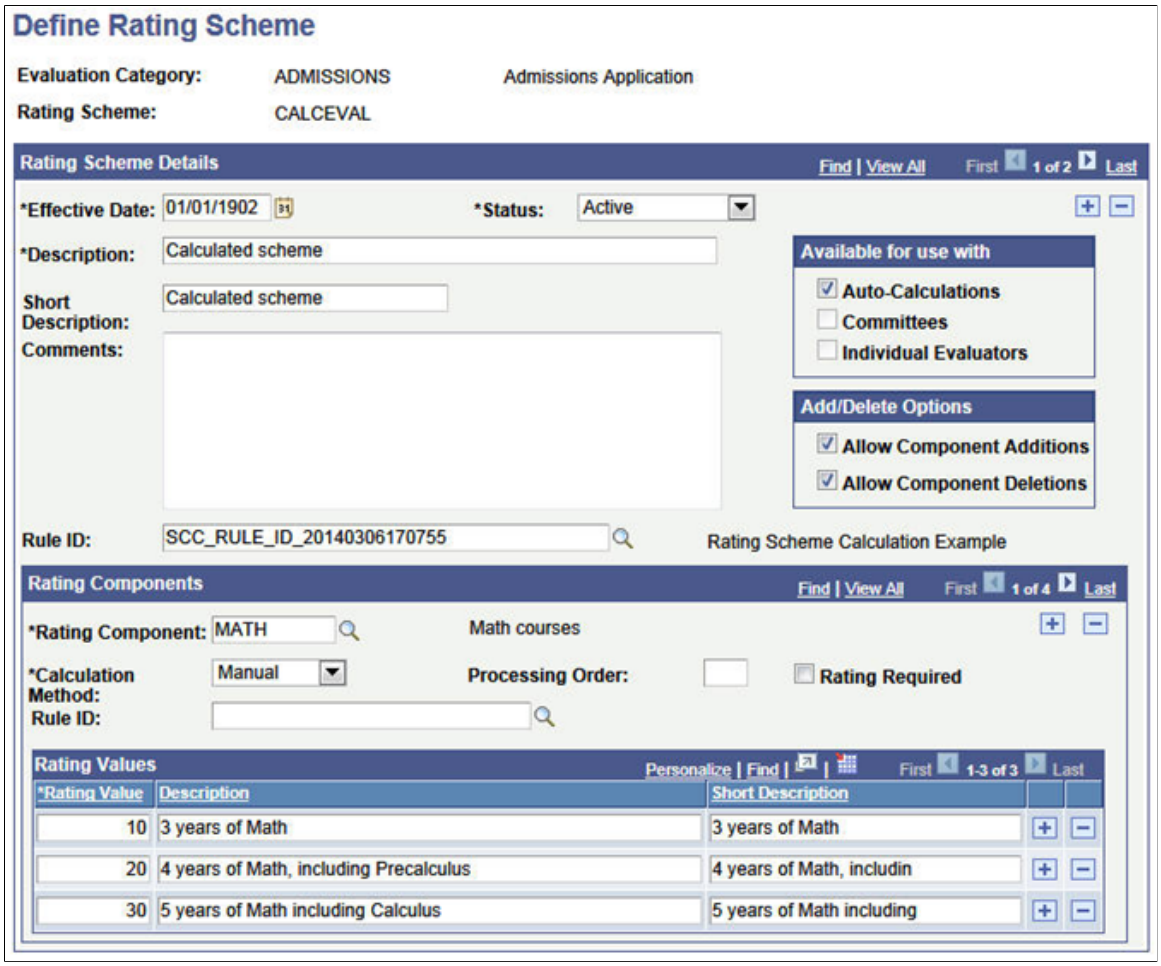
Functional Scenario Variation

The Rating Scheme setup is modified to use a rule to calculate the Overall rating. Additionally, we have included a Math rating component that is not associated with a rule and is determined then to be populated manually.

Image: Define Rating Scheme page: Rules Engine integration example (scenario variation)

This images shows the Define Rating Scheme page: Rules Engine integration example (scenario variation).



When an evaluation is assigned to an ID, there is now a component which needs to be manually entered.

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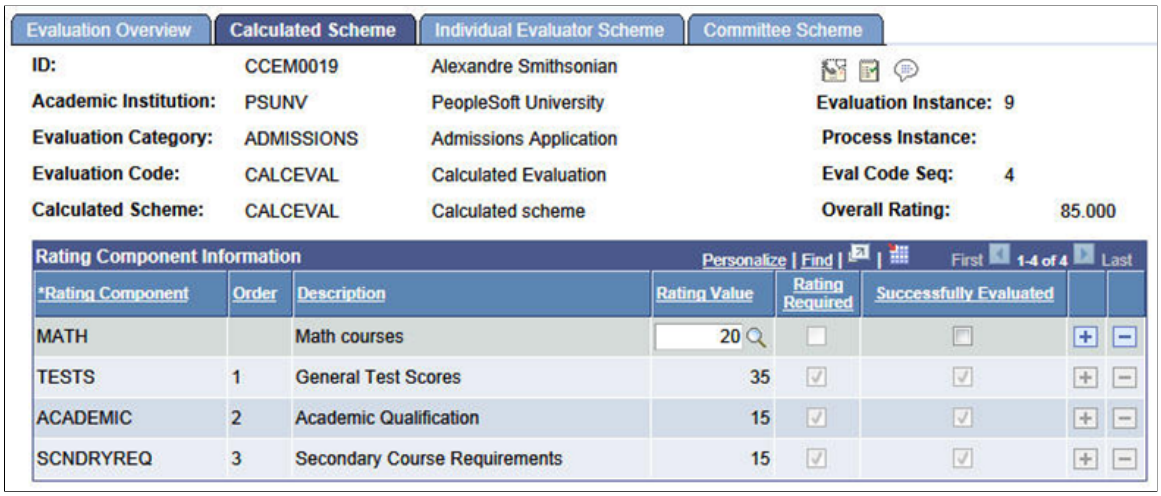
Note: The Overall Rating is now calculated by the associated rule – in this example the rule does a simple sum of the rating component values:

Image: Calculated Scheme page: Rules Engine integration example (scenario variation)

This image shows the Calculated Scheme page: Rules Engine integration example (scenario variation).



Evaluation Management System/Rules Engine Integration: Early Result Rule Group

Bundle 34: new section

If workflow is used in a particular evaluation, a rule can be associated in the Evaluation Code setup that determines whether the evaluation result or final outcome can be made at various points in a multischeme evaluation. The rules defined under the Early Result Rule Group are invoked when an evaluator submits their evaluation. A submit is defined as all required rating components are populated, an overall rating or recommendation (or both) are present and the Evaluation Status = *Final*. This can occur from the Self Service pages in the WorkCenter or in the Manage Evaluation component. Each time an evaluation is submitted the Early Result rule fires and evaluates the data returned in the Evaluator List data set. If the rule directs that Early Result = *True*, then at that point in the evaluation flow, the evaluation concludes and the evaluation can be finalized.

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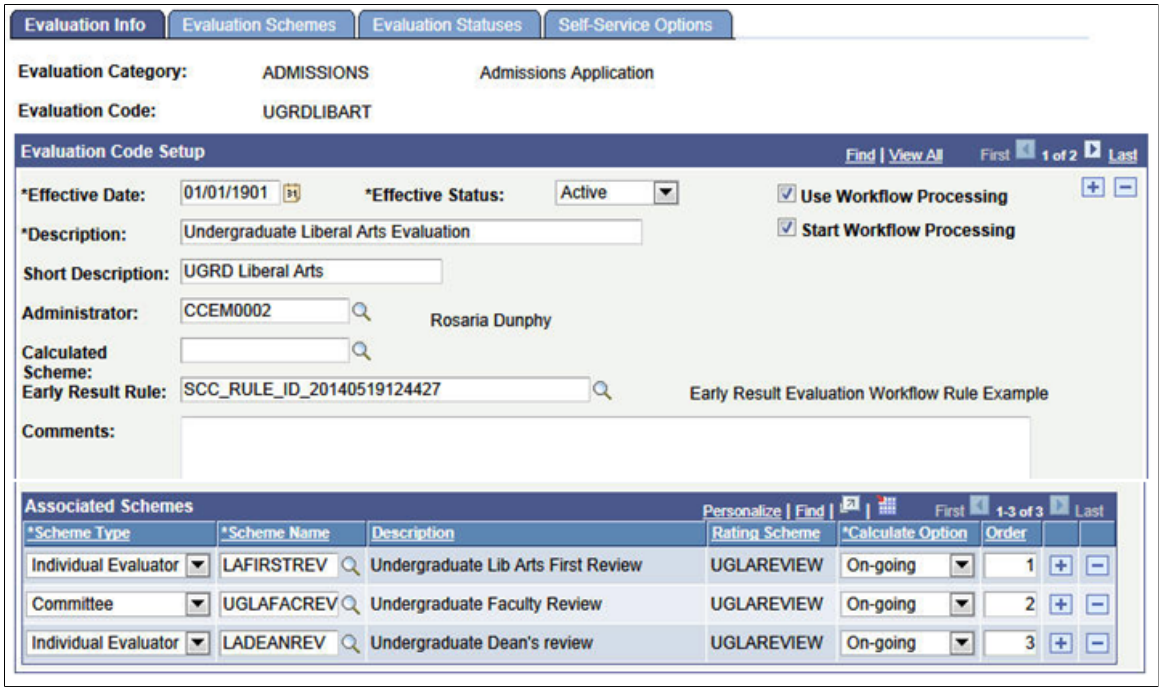
Functional Scenario

An evaluation is setup with an Early Result Rule defined in the Define Evaluation Code component:

Image: Evaluation Info page, Early Result Rule Group

This image shows the Evaluation Info page, Early Result Rule Group example.



Workflow is used in this evaluation, no calculated scheme is associated with the evaluation code. There are 3 schemes defined as part of the evaluation, as shown above.

Based on the Evaluator results at Order 1, an Early Result rule can determine whether those results require whether the evaluation needs to progress or whether the evaluation can be completed based on the results at Order 1. If those results indicate the workflow should be stopped and the evaluation completed, then the rule's logic is used to grey down all other levels in the evaluation and populate the Evaluation Status and Recommendation fields on the Evaluation Overview tab for the evaluation. Workflow ceases and no worklist items or notifications (if enabled) will be created for any of the next levels. If the evaluation is to proceed, workflow continues and worklist items and notifications are created for the next level evaluator(s) at Order 2. Again, logic in the rule determines what should happen at this level of the evaluation just as it did for Order 1.

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Here are the Evaluations and Calculations in the Rule:

Image: Evaluations and Calculations in the Early Result Rule

This image shows the Evaluations and Calculations in the Early Result Rule.

Evaluations and Calculations — Personalize | Find | First 1-19 of 19 Last

	Active	Statement Description	Details
1	☑	LENGTH OF LIST Using List Evaluator List Returning Length in evaluatorCount	
2	☑	IF evaluatorCount > 0	
3	☑	| - FOR EACH Evaluator List	
4	☑	| | - ASSIGN Evaluator = Evaluator List	
5	☑	| | - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And Evaluator.Overall Rating >= 30	
6	☑	| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = ADMIT, Recommended Prize = MCL	
7	☑	| | - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And Evaluator.Overall Rating <= 10	
8	☑	| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = DENY	
9	☑	| | | - EXIT FOR EACH	
10	☑	| | - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluator.Recommendation = ADMIT	
11	☑	| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = ADMIT	
12	☑	| | - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluator.Recommendation = DENY	
13	☑	| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = DENY	
14	☑	| | | - EXIT FOR EACH	
15	☑	| | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluator.Overall Rating >= 35 And Evaluator.Recommendation = ADMIT	
16	☑	| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = ADMIT, Recommended Prize = DEANLS	
17	☑	| | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluator.Overall Rating <= 15 And (Evaluator.Recommendation = DENY Or Evaluator.Recommendation = WAITLIST)	
18	☑	| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = DENY	
19	☑	| | | - EXIT FOR EACH	

Here is how the rule works with this scenario:

Our evaluator in the Individual Evaluator Scheme LAFIRSTREV is the first to go in the workflow processing order. In our sample rule, we've set the logic so we only want the evaluation to progress if that evaluator's results are within certain parameters:

```
| - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And
 Evaluator.Overall Rating >= 30
| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation =
 ADMIT, Recommended Prize = MCL
| | - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And
 Evaluator.Overall Rating <= 10
| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation =
 DENY
| | | - EXIT FOR EACH
```

In this example the evaluator type of 5 equates to an individual evaluator ; see more at the end of this section about evaluator types. If the evaluator's overall rating value is equal to or greater than 30 or equal to or less than 10, the evaluation flow will stop and the evaluation completed using the values specified in the rule for Recommendation to populate the Recommendation value on the Evaluation Overview page.

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For both conditions, Route to Administrator is *false* so no intervention by the Evaluation Administrator is expected. The Evaluation Status for the evaluation is set to *final*, all levels of the evaluation are grayed, no further workflow processing takes place. To continue with our scenario, let's say the evaluator's overall rating results were 25, so the workflow processing has continued and the evaluation advances to the Order 2 which is a committee scheme.

Let's look at the next part of the rule:

```
| - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluator⇒
.Recommendation = ADMIT
| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation ⇒
= ADMIT
| | - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluat⇒
or.Recommendation = DENY
| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation =⇒
 DENY
| | | - EXIT FOR EACH
```

In this section of the rule we are referencing the scheme at Order 2. Evaluator type equates to the Committee Administrator. The committee members have all submitted results and the committee administrator will finalize the results for the committee. As with the first example, we have set conditions that are going to direct the workflow, but this time using the Recommendation value that is given for the committee rather than the Overall Rating as in the first example. The logic is much the same, but note that if the Evaluator Recommendation = Deny and we return the Early Result of *True*, here we are setting the Route to Administrator to True. In that event that all levels of the evaluation are grayed, no further workflow processing takes place except for the Evaluation Administrator: a worklist item would be created and notifications sent. On the Evaluation Overview page, the Recommendation field would be populated with *Deny* but the field would not be grayed. The Evaluation Status field would not be updated with a final value. Again for purposes of our scenario, let's say that the committee recommendation is HOLDNXREV (Hold for next review) so the workflow processing has continued and the evaluation advances to the Order 3 which is an individual evaluator scheme.

Here is the final part of the rule:

```
| | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluato⇒
r.Overall Rating >= 35 And Evaluator.Recommendation = ADMIT
| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation =⇒
 ADMIT, Recommended Prize = DEANLS
| | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluato⇒
r.Overall Rating <= 15 And ( Evaluator.Recommendation = DENY Or Evaluator.Recommend⇒
ation = WAITLIST )
| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation =⇒
 DENY
| | | - EXIT FOR EACH
```

In this section of the rule we are referencing the scheme at Order 3, LADEANREV. Evaluator type equates to the Individual Evaluator Scheme Administrator. In this scheme there are multiple evaluators and it is the scheme result (think of this as a consensus of the various evaluators) as set by the administrator which will be considered by the rule. As with the previous examples, we have set conditions that are going to direct the workflow, but this time using the both the Overall Rating and Recommendation values that are given for the scheme. The logic is much the same, but with more complexity. In both conditions, we set the Route to Administrator to *True*.

Functional Scenario Variation

In the previous scenario, the evaluation code was set up for use with only Individual Evaluator and Committee Schemes. You can incorporate a calculated scheme into the evaluation code setup and have

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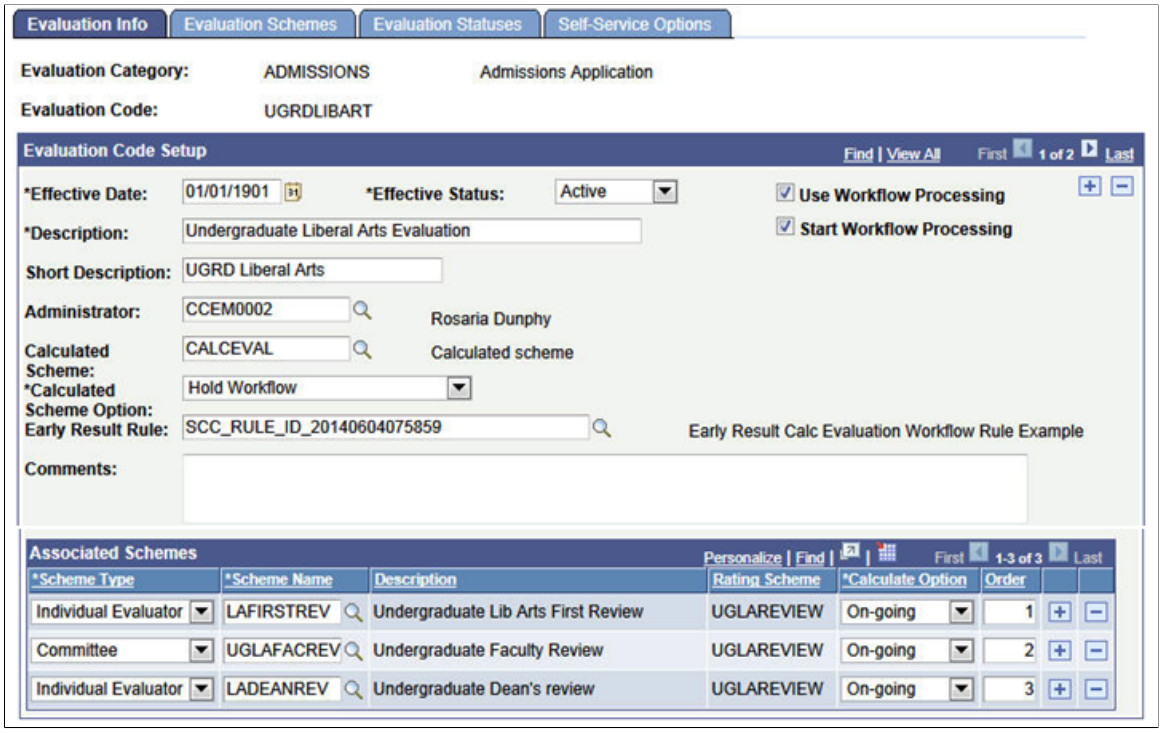
an Early Result Rule recognize the results of the calculated scheme to direct the workflow. Here is the evaluation code setup:

Image: Evaluation Info page, Early Result Rule Group with Calculated Scheme

This image shows the Evaluation Info page, Early Result Rule Group example that uses Calculated Scheme.



Workflow is used in the evaluation. Note that the Calculated Scheme Option is set to ‘Hold Workflow’. There are also Individual Evaluator and Committee Schemes in the evaluation code setup, as shown above.

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Here are the Evaluations and Calculations in the Rule:

Image: Evaluations and Calculations in the Early Result Rule

This image shows the Evaluations and Calculations in the Early Result Rule, using Calculated Scheme.

Evaluations and Calculations — Personalize | Find | First 1-23 of 23 Last

	Active	Statement Description	Details
1	☑	LENGTH OF LIST Using List Evaluator List Returning Length in evaluatorCount	
2	☑	IF evaluatorCount = 0 And Overall Rating >= 25	
3	☑	| - ASSIGN Early Result = True, Recommendation = ADMIT	
4	☑	IF evaluatorCount = 0 And Overall Rating <= 15	
5	☑	| - ASSIGN Early Result = True, Recommendation = DENY	
6	☑	IF evaluatorCount > 0	
7	☑	| - FOR EACH Evaluator List	
8	☑	| | - ASSIGN Evaluator = Evaluator List	
9	☑	| | - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And Evaluator.Overall Rating >= 30	
10	☑	| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = ADMIT, Recommended Prize = MCL	
11	☑	| | - IF Evaluator.Evaluator Type = 5 And Evaluator.Scheme = LAFIRSTREV And Evaluator.Overall Rating <= 10	
12	☑	| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = DENY	
13	☑	| | | - EXIT FOR EACH	
14	☑	| | - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluator.Recommendation = ADMIT	
15	☑	| | | - ASSIGN Early Result = True, Route To Administrator = False, Recommendation = ADMIT	
16	☑	| | - IF Evaluator.Evaluator Type = 4 And Evaluator.Scheme = UGLAFACREV And Evaluator.Recommendation = DENY	
17	☑	| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = DENY	
18	☑	| | | - EXIT FOR EACH	
19	☑	| | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluator.Overall Rating >= 35 And Evaluator.Recommendation = ADMIT	
20	☑	| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = ADMIT, Recommended Prize = DEANLS	
21	☑	| | - IF Evaluator.Evaluator Type = 3 And Evaluator.Scheme = LADEANREV And Evaluator.Overall Rating <= 15 And (Evaluator.Recommendation = DENY Or Evaluator.Recommendation = WAITLIST)	
22	☑	| | | - ASSIGN Early Result = True, Route To Administrator = True, Recommendation = DENY	
23	☑	| | | - EXIT FOR EACH	

This is the same rule seen previously but cloned to account for the use of the calculated scheme in the scenario. The calculated scheme evaluates data in the system and returns an overall rating value. For more information, see Evaluation Management System/Rules Engine Integration: Rating Component Calculation and Rating Scheme Calculation Rule Groups.

In this scenario, we want the calculated scheme overall rating to determine what happens next in the evaluation flow, so we have set the Calculated Scheme Option to *Hold Workflow*. This means that the workflow will not trigger until all required rating components have rating values and an Overall Rating is calculated. When used with this Early Result Rule, the logic in the rule will direct whether the workflow should start or not. Here is the relevant part of the rule that evaluates for the calculated scheme:

```
IF evaluatorCount = 0 And Overall Rating >= 25
| - ASSIGN Early Result = True, Recommendation = ADMIT
IF evaluatorCount = 0 And Overall Rating <= 15
```

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```
| - ASSIGN Early Result = True, Recommendation = DENY
```

In terms of activity in the evaluation, since we are holding workflow, the calculated scheme essentially is the first portion of the evaluation to take action. Once the Overall Rating is calculated this signifies a *submit* action. The early result rule is invoked. Since no evaluators are returned in the count, we know this is a calculated scheme and the logic as shown above is applied. In this scenario, the evaluation could be completed based on the calculated scheme results (if Overall Rating is > = 25 or <= 15). If the Overall Rating falls between those values, the evaluation will proceed and workflow will then start and advance the evaluation to the scheme at Order 1. From there the same scenario ensues as discussed in the previous section.

Note: Regarding the Calculated Scheme Option — if you were to use Do Not Hold Workflow and the Start Workflow flag is set to *Y* then the workflow would start immediately without consideration of the calculated scheme. In our scenario here, the difference would be that, even though not all required rating components have ratings and no Overall Rating has been calculated, the workflow would process and worklist items and notifications would be sent to evaluators in the first processing order.

A Note on Evaluator Types

Evaluator Types is a construct used behind the scenes in Evaluation Management in the management of Self Service pages display to the user and in workflow processing . We have leveraged the EMS Evaluator Decision Info Data set as well. When building rules there is a prompt available to aid in selecting the correct value. For reference here is the list of Evaluator Types:

1. Evaluation Administrator.
2. Committee Scheme Administrator.
3. Individual Scheme Administrator.
4. Committee Administrator.
5. Individual Evaluator.
6. Committee Evaluator.

Modifying and Using System Data Rules

If you want to use the delivered sample rules with your test data, you must perform the following steps:

- Clone the rule using the Rules Engine Manager. The rule (s) can be accessed in this component and copied using the ‘Create New Rule from Rule’ feature.
- Modify Rule Name and Descriptions.
- You can change the Rule Category designation.
- Modify the Rule Statements where Campus Solutions sample data is used (see the Rule Evaluation/ Calculation table entries for each rule, above) using your data, your criteria and logic on so on.
- Test the rule using the Rules Engine Manager Test feature.
- Activate the rule.

See Understanding the Rules Engine

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See Setting Up the Rules Engine

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