Setting Up Research Tracking

Setting Up Research Tracking

This section discusses how to:

- Set up Student Administration options.
- Set up research tracking options for academic programs.
- Set up research tracking options for academic plans.
- Set up research status codes.
- Set up demographic data usage.
- Set up consumption load.
- Set up consumption actions for program actions.
- Use Common Attribute Framework for research tracking.

Pages Used to Set Up Research Tracking

Page Name	***Definition Name***	***Navigation***	***Usage***
Installation Student Admin	INSTALLATION_SA	Set Up SACR, Install, Student Admin Installation, Installation Student Administration	Specify the optional consumption model to use and monitor and, if necessary, update the Last Candidate Number and Last Service Request Number settings.
Academic Program – Research Processing Options	SSR_RS_PROG_SETUP	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Research Processing Options	Identify an academic program as research-enabled and specify other information about such programs.
Academic Plan – Research Processing Options	SSR_RS_PLAN_SETUP	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Research Processing Options	Identify an academic plan as research-enabled and specify other information about such plans.
Process Status Codes	SSR_RS_STATUS_TYPE	Set Up SACR, Product Related, Student Records, Research Management, Process Status Codes	Set up status codes.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Demographic Data Use	SSR_RS_DEMSETUP	Set Up SACR, Product Related, Student Records, Research Management, Demographic Data Use, Demographic Data Use	Set up the address, email, and telephone usage to be associated with the Research module.
Research Consumption Load Setup	SSR_RS_CONSLOAD	Set Up SACR, Product Related, Student Records, Research Management, Research Consumption Load, Research Consumption Load Setup	Set up consumption load.
Program Action Process Setup	SSR_PRGRSN_DTL	Set Up SACR, Product Related, Student Records, Program Action, Program Action Process Setup	Set up automatic insertion of consumption rows for program action/action reasons entered in Student Program/ Plan.

Setting Up Student Administration Options

Access the Installation Student Admin page (Set Up SACR, Install, Student Admin Installation, Installation Student Administration).

See "Selecting Student Administration Installation Options *(PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook)*".

Setting Up Research Tracking Options for Academic Programs

Access the Academic Program – Research Processing Options page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Research Processing Options).

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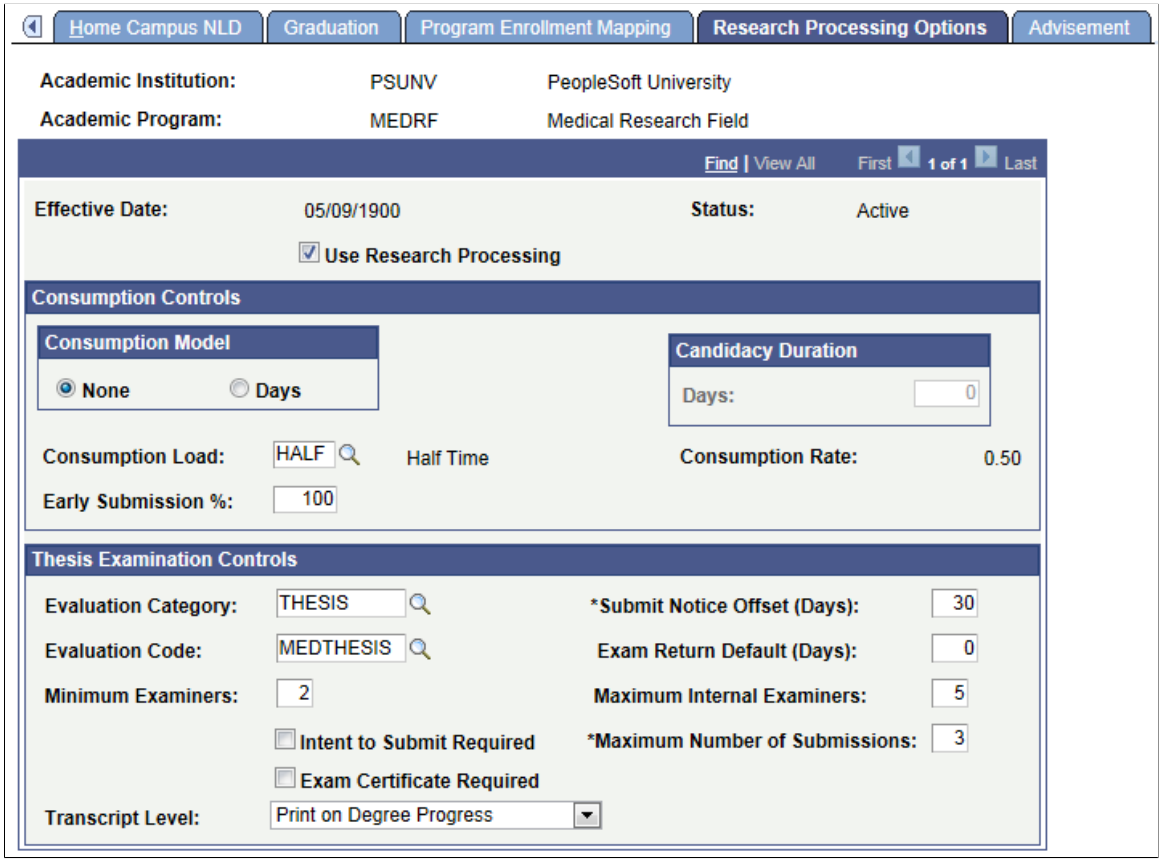
Bundle 34

Added Transcript Level to support Thesis Examination information on transcripts.

Image: Academic Program – Research Processing Options page

This example illustrates the fields and controls on the Academic Program – Research Processing Options page. You can find definitions for the fields and controls later on this page.



The system automatically identifies research candidates based on applying for admission into, or being active in, a research-enabled academic program or academic plan. This section and the following section discuss how this is set up.

Use Research Processing

Select this check box to identify the academic program as being research-enabled. All processing rules that determine if a research candidate is eligible based on the academic program are determined by this field. In addition, if the check box is selected, the other fields on the page can be edited. If the check box is deselected, all the settings on the page are reset.

Consumption Controls

This setup determines what appears on the Candidature Details page in Admissions and on the Consumption and Submission page in the Candidate Management component.

See:

- Updating Candidate Management Data Using Admissions Components

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- Tracking Consumption and Submission

Consumption Model

The option that was selected on the Installation Student Admin page appears here by default but you can change it.

See Setting Up Student Administration Options.

Candidacy Duration

Use this group box to indicate the maximum amount of time that a candidate is assigned to submit a thesis for review. The Days field is available only if the Consumption Model option is *Days.*

Consumption Load

Select a Consumption Load value. The related value then appears in the Consumption Rate field.

Values are defined on the Research Consumption Load Setup page.

See Setting Up Consumption Load.

Early Submission % (early submission percentage)

Enter a percentage (of the time allocated to complete the thesis) to indicate when a candidate can first submit his or her thesis for evaluation (Early Submission Date).

Thesis Examination Controls

Evaluation Category

An Evaluation Management attribute which is used when Student Evaluation records are created for candidates for thesis evaluation.

See:

- "Understanding Evaluation Management *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"
- "Defining Evaluation Categories *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

Evaluation Code

The Evaluation Code field can be updated only after the Evaluation Category field is selected.

This value identifies the thesis evaluation code (effectively the *evaluation scheme*) to be applied to this program, so that all candidates in this program are evaluated against the same collection of various rating schemes and components specified in this scheme when their Student Evaluation instance is created. This field prompts only on evaluation codes associated with the Evaluation Category value.

Intent to Submit Required

Indicates that candidates are required to formally notify the university of their intention to submit their theses for examination by lodging a *Notice Of Intention To Submit* form prior to submission. The check box is selected by default.

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The Exam Initiated check box on the Thesis Submission - Evaluation page can be selected only if the Intent to Submit Required check box is selected here.

See Entering Thesis Evaluation.

Submit Notice Offset (Days)

This field defines when communications are sent to the candidate, supervisor, and any other interested parties to inform them that the candidature will soon end and that the candidate will be required to submit the thesis. If the Intent to Submit Required check box has been selected, then the request for the submission of this notice is also sent.

The value of the field is an integer between 0 and 999. Though no process checks the value in this field, generally you would use this value to alert the candidate, supervisor, and research administrator that the thesis submission deadline is imminent using a 3Cs Communication email. The default value for this field is 90 (approximately three months).

Exam Return Default (Days)

This information-only field indicates how long (number of days) after the thesis has been submitted for examination and sent to an examiner that the examiner's report will be due. The value can include integers from 1 to 999.

Minimum Examiners

Enter the minimum number of examiners that must examine the thesis for the examination to be deemed valid. Valid values are whole numbers 2 through 9. This field is information-only and has no default value. You must specify a value.

Maximum Internal Examiners

Enter the maximum number of internal examiners permitted to examine a thesis for the examination to be deemed valid. The field can contain a single digit, and a value of *0* indicates that no internal examiners are permitted. The field must contain a value and defaults to *0* if no value is present when the page is saved.

Maximum Number of Submissions

Enter the maximum number of submissions that are allowed for a thesis. When a user clicks the Resubmit Thesis button on the Thesis Management page, the value that is entered here is used to determine if the maximum has been exceeded.

See Entering Thesis Details.

Exam Certificate Required

Select this check box to indicate that an examination certificate is required. If this check box is selected, users must enter a value in the Exam Supervisor Approval and Certificate Final Approval fields on the Thesis Management – Evaluation page.

See Entering Thesis Evaluation.

Transcript Level

Select the Transcript Level at which you want the Thesis Examination information to be published.

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Related Links

"Defining Academic Programs (PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook)"

Setting Up Research Tracking Options for Academic Plans

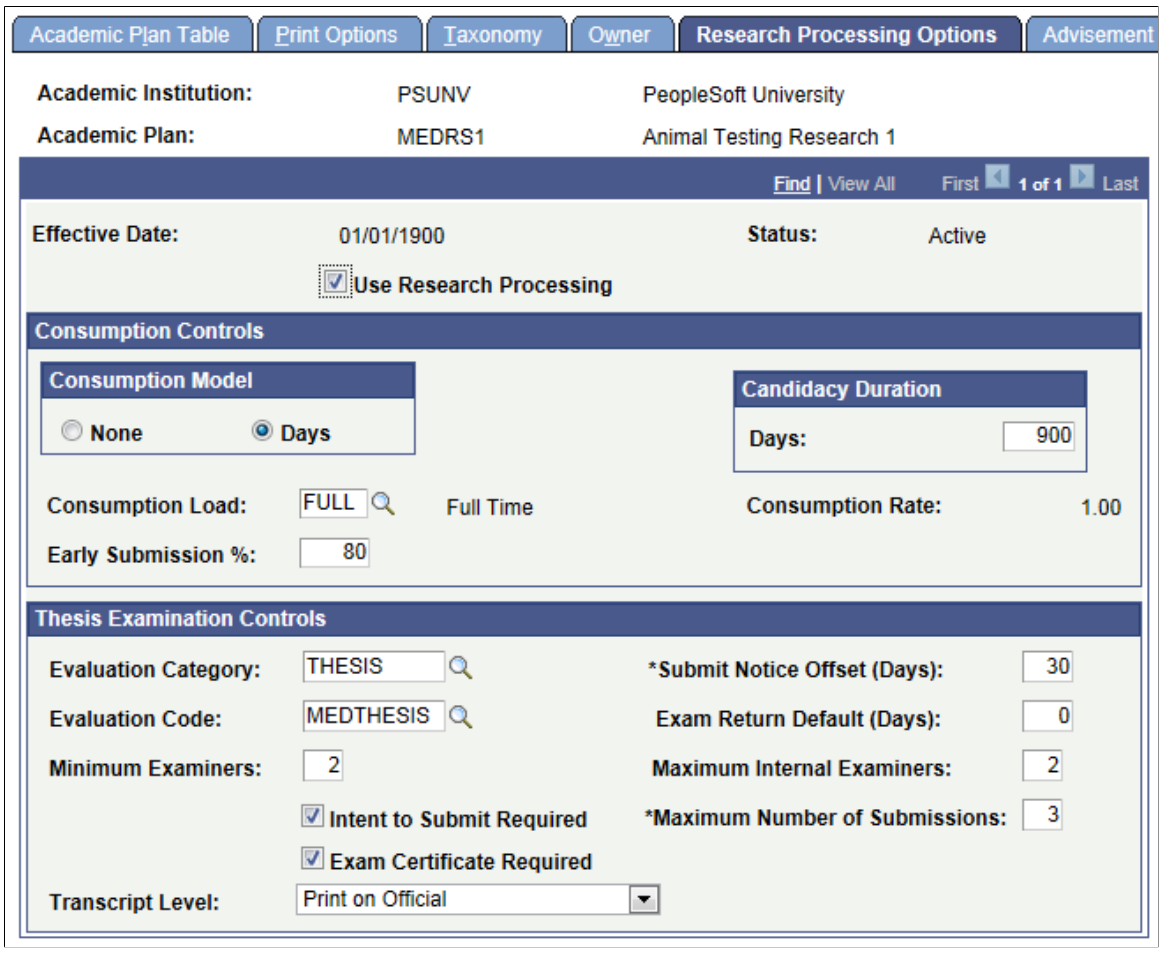
Access the Academic Plan – Research Processing Options page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Research Processing Options).

Bundle 34

Added Transcript Level to support Thesis Examination information on transcripts.

Image: Academic Plan — Research Processing Options page

This example illustrates the fields and controls on the Academic Plan — Research Processing Options page. You can find definitions for the fields and controls later on this page.



This page is identical to the Research Processing Options page in the Academic Program Table component. Refer to the documentation in the previous section.

Note: When a research candidate is assigned an academic program and academic plan which have both been enabled for research processing, the academic plan settings are used.

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Related Links

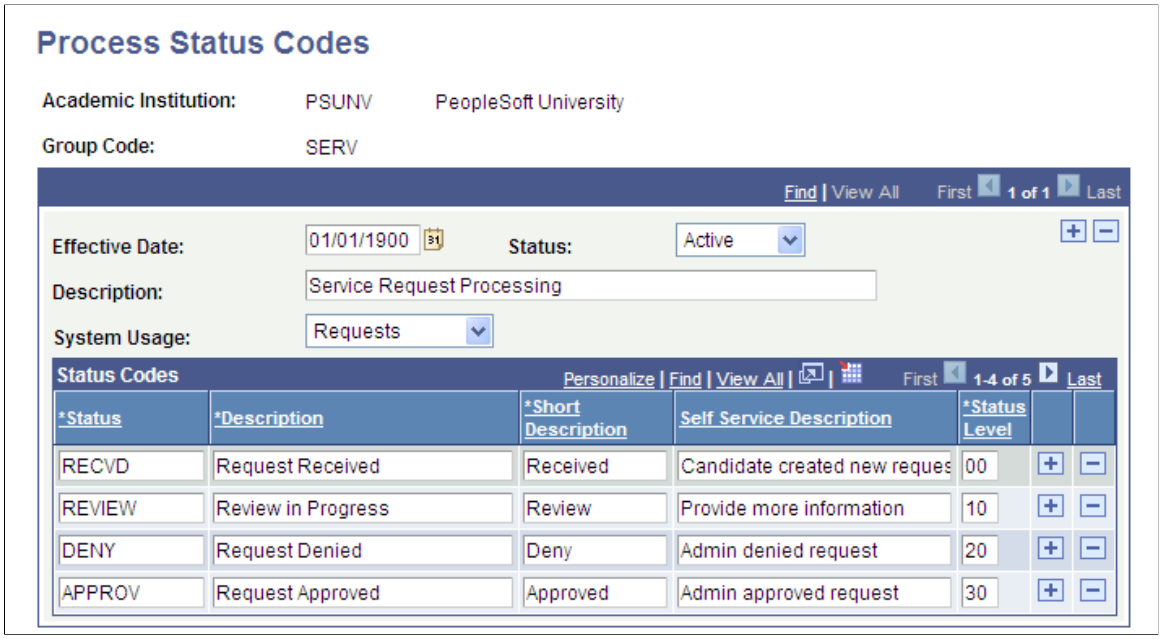
"Defining Academic Plans (PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook)"

Setting Up Research Status Codes

Access the Process Status Codes page (Set Up SACR, Product Related, Student Records, Research Management, Process Status Codes).

Image: Process Status Codes page

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



User-defined status codes are used in the Candidate Management, Thesis Management, Service Request, Candidate Center, and the Academic Project Management components to track the state of the different business elements: the research topic, supervisor selection, consumption and submission dates, thesis processing, user-defined business assignments, and service requests. Use this setup component to define all status values that a school uses to manage its business processes.

Description Enter the description of the set of status codes you are creating.

System Usage

This setting is used by the system to identify the page in the Candidate Management component, the Thesis Management component, the Service Requests self-service components for students and administrators, the Candidate Center or the Student Project Management component on which the set of status code values will be used. The field can contain one of the following values:

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System Usage Value	*Pages Used*
Topic	Candidate Management, Research Topic page Admissions: Add/Maintain Applications page Candidate Center, Topic Details page
Supervisor	Candidate Management, Supervisors page Admissions: Add/Maintain Applications page Student Project Management, Additional Details page (Supervisors group box) Candidate Center, Supervisor Details page
Consumption	Candidate Management, Consumption and Submission page Admissions: Add/Maintain Applications page Candidate Center, Consumption/Submission Details page
Assignment	Candidate Management, Other Assignments page Admissions: Add/Maintain Applications page Student Project Management, Additional Details page (Supervisors group box) Candidate Center, Assignment Details page
Thesis	Thesis Management, Thesis Submission page Candidate Center, Thesis Details page
Requests	Service Request Management page Self Service, Requests, My Service Requests page (for students) Service Request Dashboard (Service Requests pagelet for administrators)
Project	Student Project Management, Project Management page

Status Codes

Status Use this value to track the business process. The field is alphanumeric and is required.

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Note: You can assign a status code to trigger a 3C communication event from the Candidate Management and Thesis Management components. 3C Engine PeopleCode function calls have been added to these components to trigger online communication events. Adding the field SSR_RS_STATUS from the Edit Table SSR_RS_STATUS_D to the Trigger Prompt Table setup allows this functionality.

See "Defining 3C Engine Triggers *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*".

Description Enter the status description that is displayed on the Service Requests self-service component pages for administrator.

Self Service Description Enter the status description that is displayed on the Candidate Center and Service Requests self-service component pages for students. This allows for a more student-friendly description than the internal value used by administrators.

Status Level A numeric value that ranks the status code values. The greater the number, the higher the ranking of the code. The default value is *0.* These status level codes are used to manage student update thresholds in Research Service Requests, and to determine whether to update candidate and thesis data from the Candidate Center.

Related Links

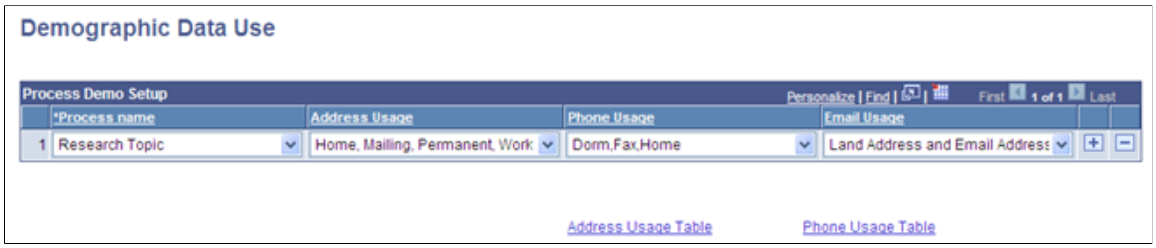
"Creating and Updating Service Requests (Candidates) (PeopleSoft Campus Self Service 9.0 PeopleBook)"
"Administering Service Requests (Administrators) (PeopleSoft Campus Self Service 9.0 PeopleBook)"

Setting Up Demographic Data Usage

Access the Demographic Data Use page (Set Up SACR, Product Related, Student Records, Research Management, Demographic Data Use, Demographic Data Use).

Image: Demographic Data Use page

This example illustrates the fields and controls on the Demographic Data Use page . You can find definitions for the fields and controls later on this page.



Use this page to set up how a person's address, email, and telephone information are to be handled by the research module. Currently, the Research Topic Setup - Contact information uses this setup, but additional research features will be added as they are developed.

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See Associating Organizations and Contacts with Research Topics.

Related Links

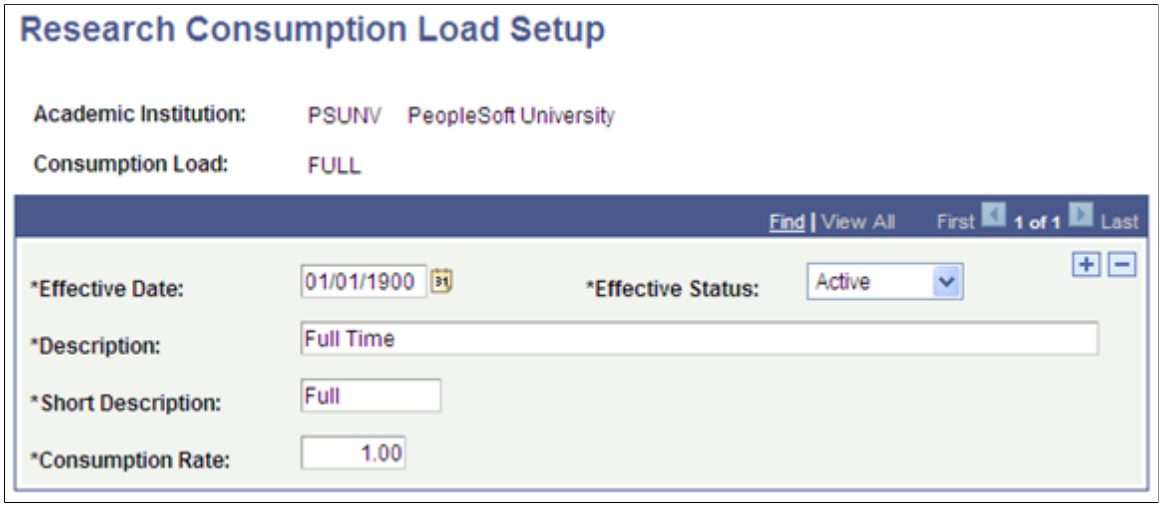
"Establishing Address Usages (PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)"
"Establishing Phone Usages (PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)"

Setting Up Consumption Load

Access the Research Consumption Load Setup page (Set Up SACR, Product Related, Student Records, Research Management, Research Consumption Load, Research Consumption Load Setup).

Image: Research Consumption Load Setup page

This example illustrates the fields and controls on the Research Consumption Load Setup page. You can find definitions for the fields and controls later on this page.



Use this page to set up the valid consumption load values at the institution. Consumption load defines the rate at which a candidate conducts his or her research. This is similar to the principle of academic load, but is not based on enrollment. A consumption rate of 1.0 implies that 100 percent of the candidate's time is spent performing research and related activities. The consumption rate directly impacts the length of time a candidate is projected to complete the research and submit the thesis for evaluation. The values that you set up here are used on the Research Processing Options page in the Academic Program Table and Academic Plan Table components, as well as in the Candidature Details page in Admissions and in the Candidate Management component.

See:

- Setting Up Research Tracking Options for Academic Programs
- Setting Up Research Tracking Options for Academic Plans

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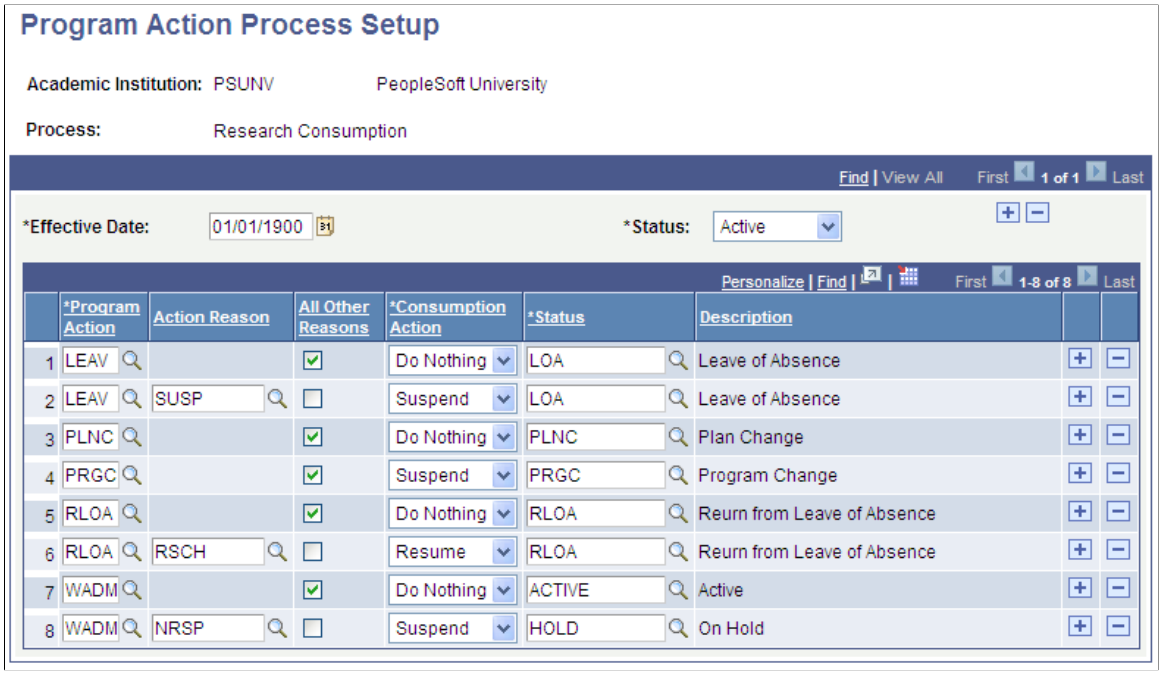
Setting Up Consumption Actions for Program Actions

Access the Program Action Process Setup page (Set Up SACR, Product Related, Student Records, Program Action, Program Action Process Setup).

Image: Program Action Process Setup page

This example illustrates the fields and controls on the Program Action Process Setup page. You can find definitions for the fields and controls later on this page.



Use this page to define Program Action/Action Reason combinations which can trigger an update of the student's candidate information from the Student Program/Plan component.

Enter a Consumption Action and Status for a Program Action/Action Reason. When the Program Action/Action Reason combination is saved in the Student Program Plan component, the related Consumption Action and Status values are automatically inserted in the SSR_RS_CONSMPTN record (Consumption and Submission page in the Candidate Management component).

You can use this feature to automatically suspend and resume the consumption process. This action will be performed only if the Days consumption model has been selected for the candidate.

Note: This is an optional feature and should be carefully implemented after an analysis of your business requirements.

Program Action — You must select a value. Values are defined on the Program Action Table page.

Action Reason — The available values are those defined on the Program Action Reason Table page.

All Other Reasons — Select this check box to identify how Program Action / Action Reason values other than those specifically defined should be treated.

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Consumption Action Indicates how the consumption calculation process will be affected by the Program Action and Action Reason. The available values are: *Suspend* (the calculation), *Resume* (from a previously suspended state), and *Do Nothing* (no effect).

Status The available values are the Status Codes defined for the System Usage Value of *Consumption* on the Process Status Codes page.

See Tracking Consumption and Submission.

Using Common Attribute Framework for Research Tracking

The Common Attribute Framework enables you to define a common attribute and add the common attribute as a data field to any Campus Solutions page. A user can then enter a value on the page for the data field.

Use the Common Attribute Framework to create attributes for the Research Tracking feature. Create attributes using the Common Attribute component (Set Up SACR, Common Definitions, Common Attributes Setup, Common Attribute) and then use the Record Context component (Set Up SACR, Common Definitions, Common Attributes Setup, Record Context) to associate attributes with a particular record.

See:

- "Defining a Common Attribute *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"
- "Associating a Common Attribute to a Record *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

This table lists the delivered record contexts for Research Tracking, the attributes, and the pages with which the record contexts are associated.

Record Context	***Attribute***	***Page***
SSR_RS_TPCSETUP	Topic Setup Attributes	Research Topic Setup - Additional Information
SSR_RS_TOPIC	Research Topic Attributes	Candidate Management – Research Topic
SSR_RS_SUPRVSRS	Supervisor Attributes	Candidate Management – Supervisors
SSR_RS_CONSMPTN	Consumption Attributes	Candidate Management - Consumption and Submission
SSR_RS_OTHRQDTL	Other Assignments Attributes	Candidate Management - Other Assignments
SSR_RS_THESIS	Thesis Attributes	Thesis Management – Additional Information
SSR_ADMN_DTL	Administrator Attributes	Administrator Profile Management

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The pages are discussed in later topics related to setting up Research Tracking or in topics related to managing Research Tracking.

Note: Attributes defined for the Thesis Management, Supervisors, and Other Assignments pages are the same Common Attribute Framework records used in the Student Project Management component. Any attributes that you add appear in both the Student Project and Research Management areas. To configure attributes to be used exclusively for either the Research or Academic Project pages, use the Common Attribute Framework attribute filter class (SSR_RS_RESEARCH:CAF_Filters:ResearchAttributeFilter) and work entities (ResearchManagement, AcademicProject) to configure the attributes in the Common Attribute Framework Record Context setup page.

Setting Up Research Topics

This section discusses how to:

- Define research topic categories.
- Define research topics.
- Review available research supervisors.
- Associate organizations and contacts with research topics.
- Enter additional information.
- Enter Attachments.
- Set up self-service research topic search.

Pages Used to Define Research Topics

Page Name	*Definition Name*	*Navigation*	*Usage*
Research Topic Category	SSR_RS_TOPICCAT	Set Up SACR, Product Related, Student Records, Research Management, Research Topic Categories, Research Topic Category	Create research topic categories for assignment to research topics.
Topic Setup	SSR_RS_TOPIC_SETUP	Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Topic Setup	Create the research topics that are offered at the institution. Provide information about research topics, including a description and the academic programs and plans to which they are associated.
Research Topic Setup – Available Supervisors	SSR_RS_TOPIC_SUP	Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Available Supervisors	View all available research supervisors who have academic programs or academic plans that match the research topic.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Research Topic Setup – Organization and Contacts	SSR_RS_ORG_CONTACT	Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Organization and Contacts	Associate one or more academic or external organization(s) with the research topic and set up contacts for a research topic.
Research Topic Setup – Add Organization	SSR_RS_TPC_ORG	Click the Add Organization button on the Organization and Contacts page.	Select organizations to associate with a research topic.
Research Topic Setup – Academic Organization Details	SSR_RS_TPC_ACADORG	Click the View Details link on the Organization and Contacts page.	View details about academic organizations that are associated with a research topic.
Research Topic Setup – External Organization Details	SSR_RS_TPC_EXTORG	Click the View Details link on the Organization and Contacts page.	View details about external organizations that are associated with a research topic.
Research Topic Setup – Add Contact	SSR_RS_TPC_ADDCNCT	Click the Add Contact button on the Organization and Contacts page.	Select contacts to associate with a research topic.
Research Topic Setup – Contact Details	SSR_RS_TPC_CNCT	Click the Contact Details link on the Organization and Contacts page.	View details about contacts that are associated with a research topic.
Research Topic Setup - Additional Information	SSR_RS_TOPICST_CA	Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Additional Information	Enter and review Common Attribute fields associated with the research topic. This page appears only if Common Attribute fields have been created using the Common Attribute Framework.
Research Topic Setup – Attachments	SSR_RS_TOPICST_ATT	Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Attachments	Add one or more attachments for a research topic.

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Defining Research Topic Categories

Access the Research Topic Category page (Set Up SACR, Product Related, Student Records, Research Management, Research Topic Categories, Research Topic Category).

Image: Research Topic Category page

This example illustrates the fields and controls on the Research Topic Category page. You can find definitions for the fields and controls later on this page.

Research topic categories are user-defined attributes that can be assigned to research topics. For example, you can create a category to group research topics that belong to a common organization or funding source.

Status

Select *Active* to make the topic category available for use in the Topic Setup page.

Display in Self Service

If you select this check box:

- The Category Name can be used as search criteria on the Search for Research Topics self-service page. Enter a name for the category on the Topic Setup page.
- Category data (defined on the Topic Setup page) displays in the self-service page for the topic if the Display check box is selected for CATEGORY on the Fields Setup page.

See Setting Up Self-Service Research Topic Search

See Defining Research Topics

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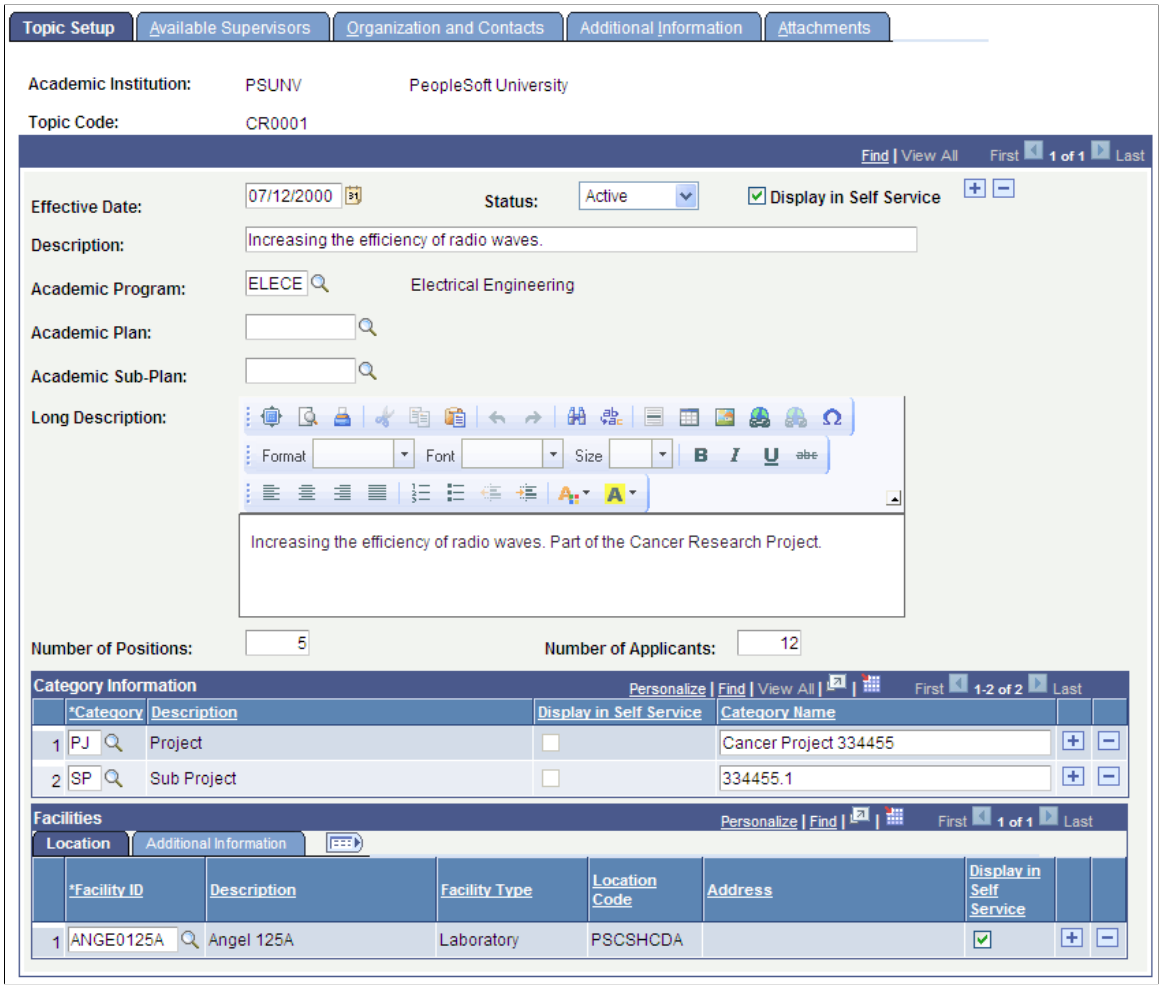
Defining Research Topics

Access the Research Topic Setup – Topic Setup page (Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Topic Setup).

Image: Research Topic Setup page

This example illustrates the fields and controls on the Research Topic Setup page. You can find definitions for the fields and controls later on this page.



Display in Self Service Select if you want the system to display this topic on the Search for Research Topics self-service page.

The Academic Program, Academic Plan, and Academic Sub-Plan fields on the Topic Setup page are used to control whether a topic is available to a research candidate. Because of the defined relationships between the fields, the page validates entries to prevent an invalid combination of values. A research topic can be defined as valid for:

- An academic program only.
- An academic program and academic plan combination.
- An academic plan and academic sub-plan combination.

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- An academic program, academic plan, and academic sub-plan combination.

Academic Program	Select the academic program to which the research topic belongs.
Academic Plan and **Academic Sub-Plan**	Select the academic plan and sub-plan (if any) to which the research topic belongs.
Long Description	Enter a description of the research topic.
Number of Positions and **Number of Applicants**	Enter the total number of available positions and maximum number of applicants for the research topic. These fields are informational only.

Category Information

Category	The Category Code assigned to the topic. The Category value is optional.
Display in Self Service	This check box is display-only on the Topic Setup page. Use the Display in Self Service check box on the Research Topic Category page to indicate whether category information should display on the Search for Research Topics self-service page. See Defining Research Topic Categories See Setting Up Self-Service Research Topic Search
Category Name	Use this optional field to provide additional information to identify the assigned category.

Facilities

Set up information about the location and facilities used for this research.

See Defining Buildings, Rooms, and Classroom Facilities

See product documentation for PeopleSoft HRMS Application Fundamentals, Setting Up Organization Foundation Tables, Establishing Locations

Display in Self Service	If the Display check box is selected for FACILITY on the Fields Setup page, and you select this check box, data displays for the topic on the Search for Research Topics self-service page. See Setting Up Self-Service Research Topic Search

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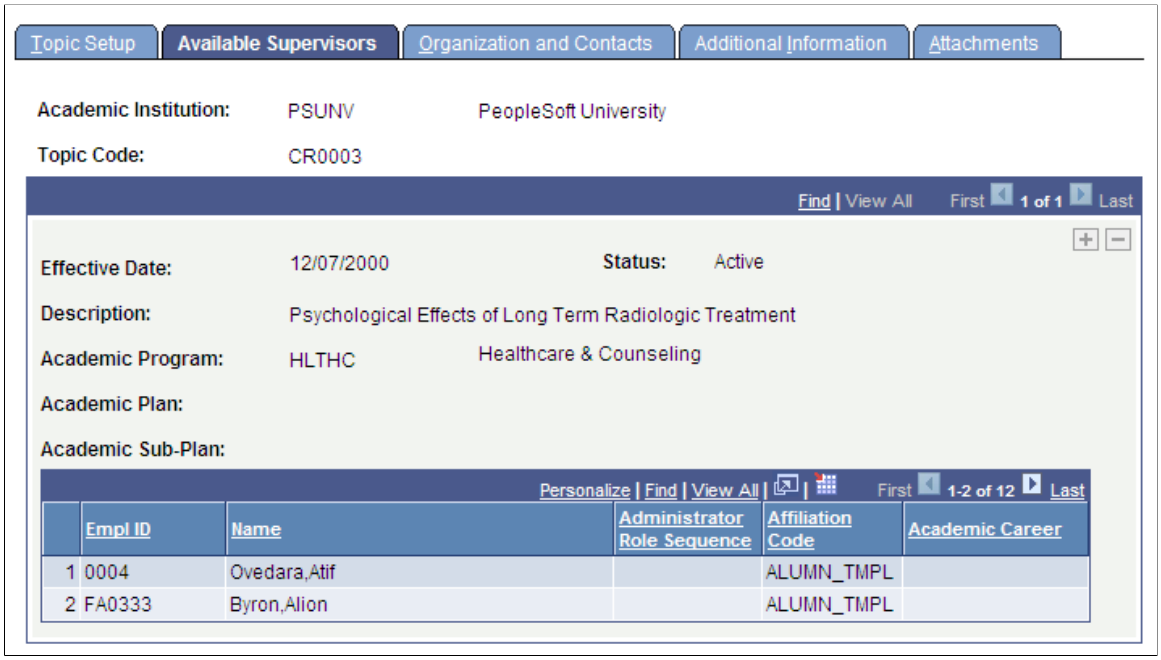
Reviewing Available Research Supervisors

Access the Research Topic Setup - Available Supervisors page (Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Available Supervisors).

Image: Research Topic Setup - Available Supervisors page

This example illustrates the fields and controls on the Research Topic Setup - Available Supervisors page. You can find definitions for the fields and controls later on this page.



The Available Supervisors page is display-only.

See Setting Up Research Administrators

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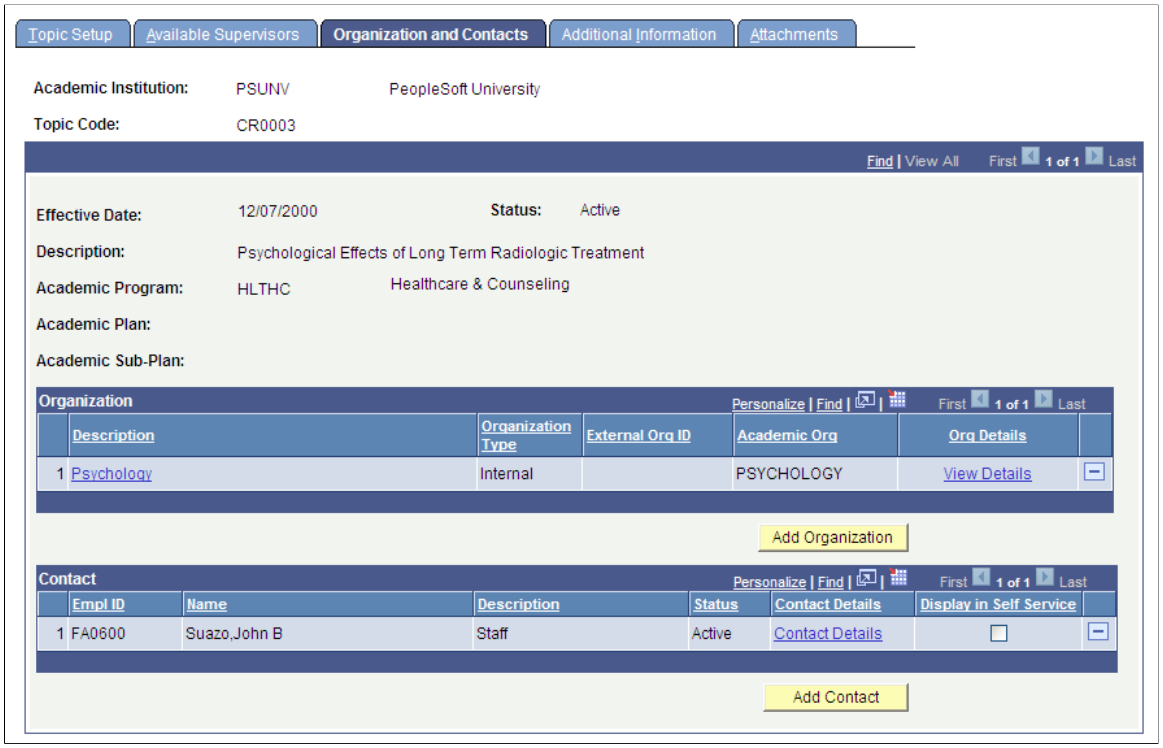
Associating Organizations and Contacts with Research Topics

Access the Research Topic Setup - Organizations and Contacts page (Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Organization and Contacts).

Image: Research Topic Setup - Organizations and Contacts page

This example illustrates the fields and controls on the Research Topic Setup - Organizations and Contacts page . You can find definitions for the fields and controls later on this page.



Organization

You can associate external organizations or academic organizations with a research topic.

External organizations are defined in the Organization Table (Campus Community, Organization, Create/Maintain Organizations, Organization Table).

See "Understanding Organizations *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*".

Academic organizations are defined in the Academic Organization Table (Setup SACR, Foundation Tables, Academic Structure, Academic Organization Table).

See "Defining Academic Organizations *(PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook)*".

Description Click this link to access the Organization Table (EXT_ORG_TABLE) page or the Academic Organization Table (ACADEMIC_ORG_TBL) page. The link is available only for users who are authorized to access the relevant component.

View Details Click this link to access a display only page (External Organization Details page or Academic Organization Details

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page). This link allows users who do not have security access to the Organization Table or Academic Organization Table components to view the relevant organization data.

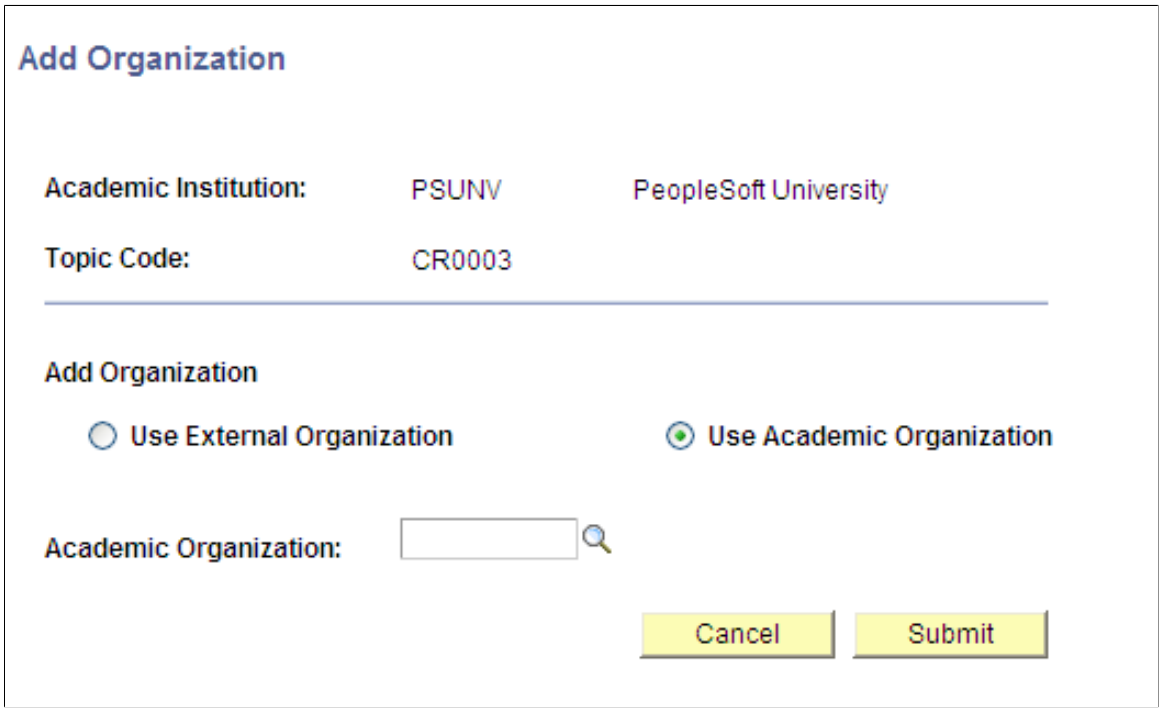
See "Securing Academic Organizations *(PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook)*"

Add Organization

When you click the Add Organization button, you are taken to the Add Organization (SSR_RS_TPC_ORG) page:

Image: Add Organization page

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



Depending on the option that you select, the External Organization or Academic Organization field appears and you can select the organization with which to associate the research topic.

Contact

You can also associate contacts with a research topic. Contacts must have an EmplID in the system.

Contact Details

Click this link to access the Contact Details (SSR_RS_TPC_CNCT) page and view address, email, and phone details for the contact. The Demographic Data Usage settings will determine the contact details to display.

Display in Self Service

If the Display check box is selected for CONTACT, CONTACTEMAIL and CONTACTPHNBR on the Fields Setup page and you select this check box, then the contact name, email

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and phone data displays for the topic on the Search for Research Topics self-service page.

See Setting Up Self-Service Research Topic Search

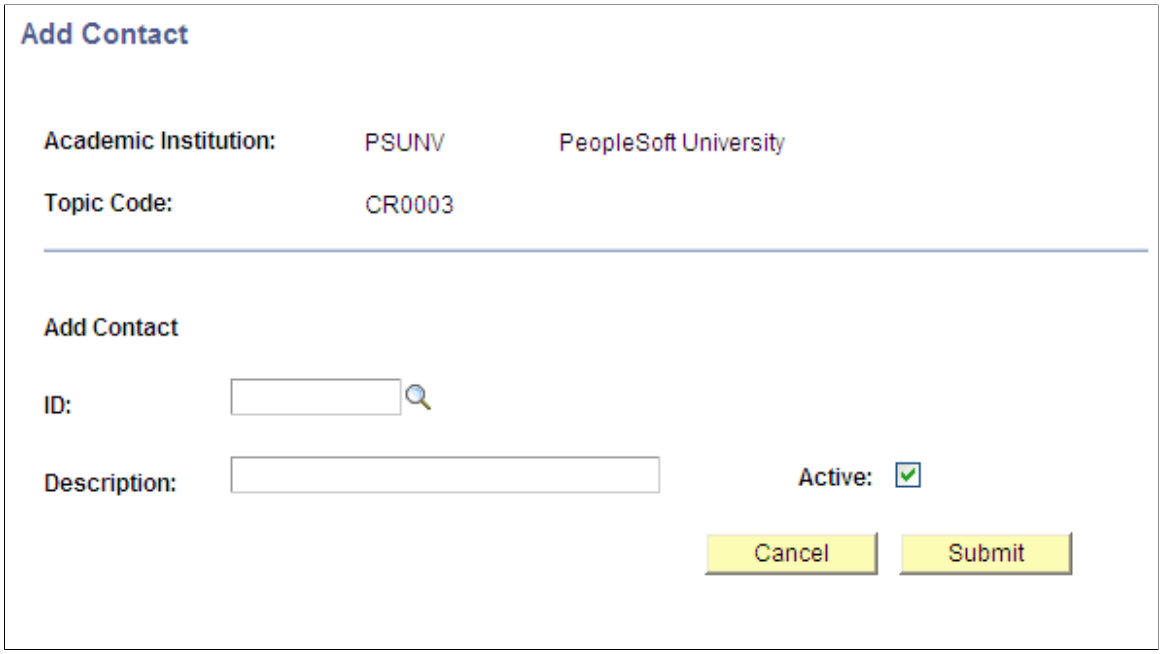
Display in Self Service Select this check box to indicate that candidates can view contact details in the Research Topic Search self-service page.

Add Contact

When you click the Add Contact button, you are taken to the Add Contact (SSR_RS_TPC_ADDCNCT) page:

Image: Add Contact page

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



ID When you select an ID, the address, phone, and email details appear here based on the address, phone, and email types that have been set up on the Demographic Data Use page.

See Setting Up Demographic Data Usage

Active Use the Active check box to indicate whether the contact is active or inactive.

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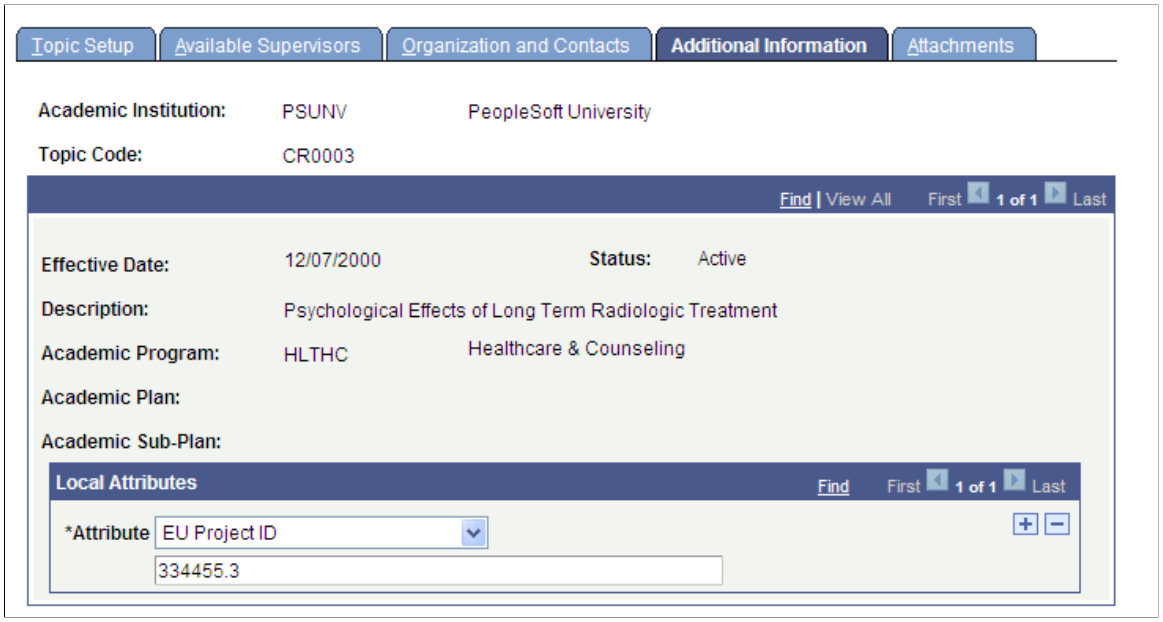
Entering Additional Information

Access the Research Topic Setup – Additional Information page (Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Additional Information).

Image: Research Topic Setup – Additional Information page

This example illustrates the fields and controls on the Research Topic Setup – Additional Information page. You can find definitions for the fields and controls later on this page.



Use this page to enter and review Common Attribute fields associated with the research topic.

This page appears only if common attributes have been created for the research topic setup using the Common Attribute Framework.

See Using Common Attribute Framework for Research Tracking

See "Defining a Common Attribute *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

"Associating a Common Attribute to a Record *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

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Entering Attachments

Access the Research Topic Setup – Attachments page (Set Up SACR, Product Related, Student Records, Research Management, Research Topic Setup, Attachments). These attachments are made available for viewing in the Research Topic Search self-service page.

Image: Research Topic Setup – Attachments page

This example illustrates the fields and controls on the Research Topic Setup – Attachments page. You can find definitions for the fields and controls later on this page.

Visible to Student Select to set whether or not the attachment is visible to students through the Research Topic Search self-service page. By default, attachments added to administrator pages are not visible to students.

Setting Up Self-Service Research Topic Search

The Search for Research Topics page is available in Self Service if you select the Display in Self Service check box on the Topic Setup page.

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Here is an example of the Search for Research Topics page:

Image: Search for Research Topics page example

This example illustrates the fields and controls on the Search for Research Topics page example. You can find definitions for the fields and controls later on this page.

Fields Setup is a Research Management component (SCC_FIELD_SETUP) that is used by Research Tracking to control the display of sections and fields on the Search For Research Topic self-service page. The self-service display settings are provided. Search for Page = Research Topic.

See the product documentation for Campus Community, Configuring Tasks.

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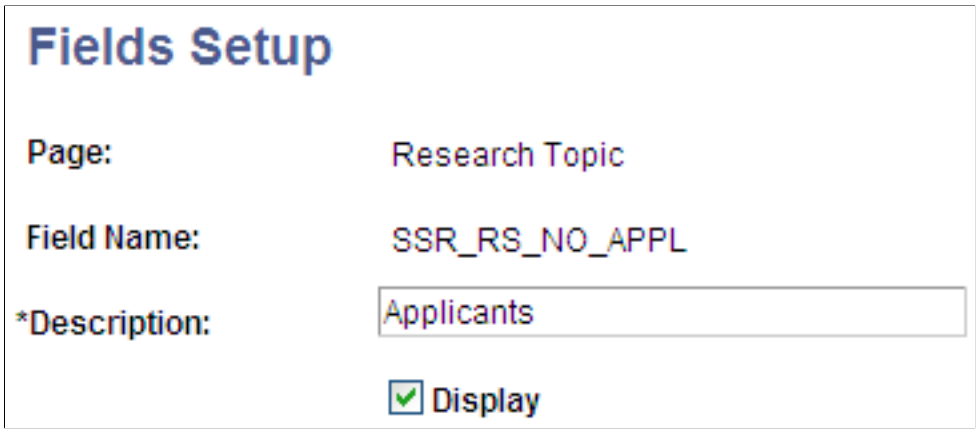
Here is an example of the Fields Setup page for Research Topic (Set Up SACR, Product Related, Student Records, Research Management, Fields Setup):

Image: Fields Setup page example for Research Topic

This example illustrates the fields and controls on the Fields Setup page example for Research Topic. You can find definitions for the fields and controls later on this page.



If the Display check box is selected on the Fields Setup page, the section (for example Supervisors) or field (for example Applicants) is displayed on the Search for Research Topic page for *all* topics that are available in Self Service.

Except for a few sections on the self-service page, data (defined in the Topic Setup component) is automatically displayed. If no data exists in Topic Setup, this message is displayed: *There is no Data setup for this Topic.*

You can control the display of data for the Categories, Contacts and Facilities sections at the *individual topic* level. For example, if the Display check box is selected for FACILITY in Fields Setup, but the Display in Self Service check box is not selected in the Facilities section of the Topic Setup page for topic RT0001, Facilities data does not display for RT001 on the self-service page. *There is no Data setup for this Topic* is displayed.

Note: For categories, the Display in Self Service check box is display-only on the Topic Setup page and the display of self-service data is controlled on the Research Topic Category page.

Note: For contacts, the Display in Self Service check box on the Topic Setup–Organization and Contacts page controls the display of the contact name, phone and email address in Self Service. If Display is selected for CONTACT (section), CONTACTEMAIL and CONTACTPHONENBR in Fields Setup and Display in Self Service is selected in Topic Setup for topic RT002, then the contact name, email address and phone number all display in Self Service for RT0002.

See:

- "Searching for Research Topics *(PeopleSoft Campus Self Service 9.0 PeopleBook)*"
- Defining Research Topics
- Defining Research Topic Categories

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Setting Up Research Administrators

This section discusses how to:

- Define administrators.
- Define and manage administrator profiles.
- Define supervisor roles.
- Define additional business assignments.

Currently, support is provided to define the following administrator roles:

- Research supervisor
- Thesis evaluator
- Project Supervisor

Note: The Research feature enhancements to the Instructor/Advisor Table page that were delivered in Additional Features January 2012 (bundle 24) were removed in Additional Features October 2012 (bundle 27). The page operates as it did before bundle 24.

Pages Used to Set Up Research Administrators

Page Name	*Definition Name*	*Navigation*	*Usage*
Definition	SCC_AFL_TBL	Set Up SACR, Common Definitions, Affiliations, Affiliation Setup, Definition	Define affiliation codes and the hierarchical structure of those codes.
Trigger	SCC_AFL_TRGR	Set Up SACR, Common Definitions, Affiliations, Affiliation Setup, Trigger	Define simple events that trigger the system to determine whether to assign or remove an affiliation.
Academic Institution 10	SSR_ADMN_TYPAFL	Setup SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 10	Map affiliation codes to administrator roles.
Administrator Profile Management	SSR_ADMN_DTL	Records and Enrollment, Graduate Research Management, Administrator Profile, Administrator Profile Management	Enter and track administrators. The qualifications of the administrator and approval of the qualifications can be tracked. Academic areas of participation and availability of the administrator is also managed.

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Page Name	Definition Name	Navigation	Usage
Supervisor Roles	SSR_RS_SUPR_TYP	Set Up SACR, Product Related, Student Records, Research Management, Supervisor Roles, Supervisor Roles	Define the valid supervisor roles for the institution.
Assignment Type Options	SSR_RS_REQTYP_STUP	Set Up SACR, Product Related, Student Records, Research Management, Assignment Types, Assignment Type Options	Define additional business requirements that can be assigned to research candidates.

Defining Administrators

Use the Affiliation Setup component and the Academic Institution 10 page to define administrators for Research Tracking.

Setting up Affiliation Codes for Research Tracking

The first step in defining administrators (supervisors and evaluators) is to use the Affiliation Setup component to set up affiliations, which can include child affiliations. Select the Root Indicator check box to indicate that the Affiliation Code is at the highest level of the affiliation hierarchy.

For example, you might set up an Affiliation Code of *Supervisor,* select the Root Indicator check box, then select the Children Indicator check box and set up Child Affiliations such as *Internal Supervisor* and *External Supervisor*.

Later you will map the *root affiliations* to Supervisor and Evaluator roles on the Academic Institution 10 page.

A sample affiliation is provided for setting up supervisors:

SUPRV_TMPL: PSUNV Research Supervisor: Research Supervisor root affiliation code with child affiliation code PROF_TMPL. PROF_TMPL: PeopleSoft University Professor (Application Class Package ID: SSR_RS_RESEARCH and Trigger: SSR_ADMN_AFFL_DATA_SYNC).

Note: Before you can set up or use Affiliations functionality, your institution must enable Constituent Web Services.

See "Defining Affiliations *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

See Setting Up Integration Broker For Research Administrator Profile Affiliations

Mapping Affiliation Codes to Administrator Roles

After you set up your Affiliation codes, map the root affiliations to Supervisor and Evaluator roles on the Academic Institution 10 page (Setup SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 10).

See "Mapping Affiliation Codes to Administrator Roles *(PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook)*"

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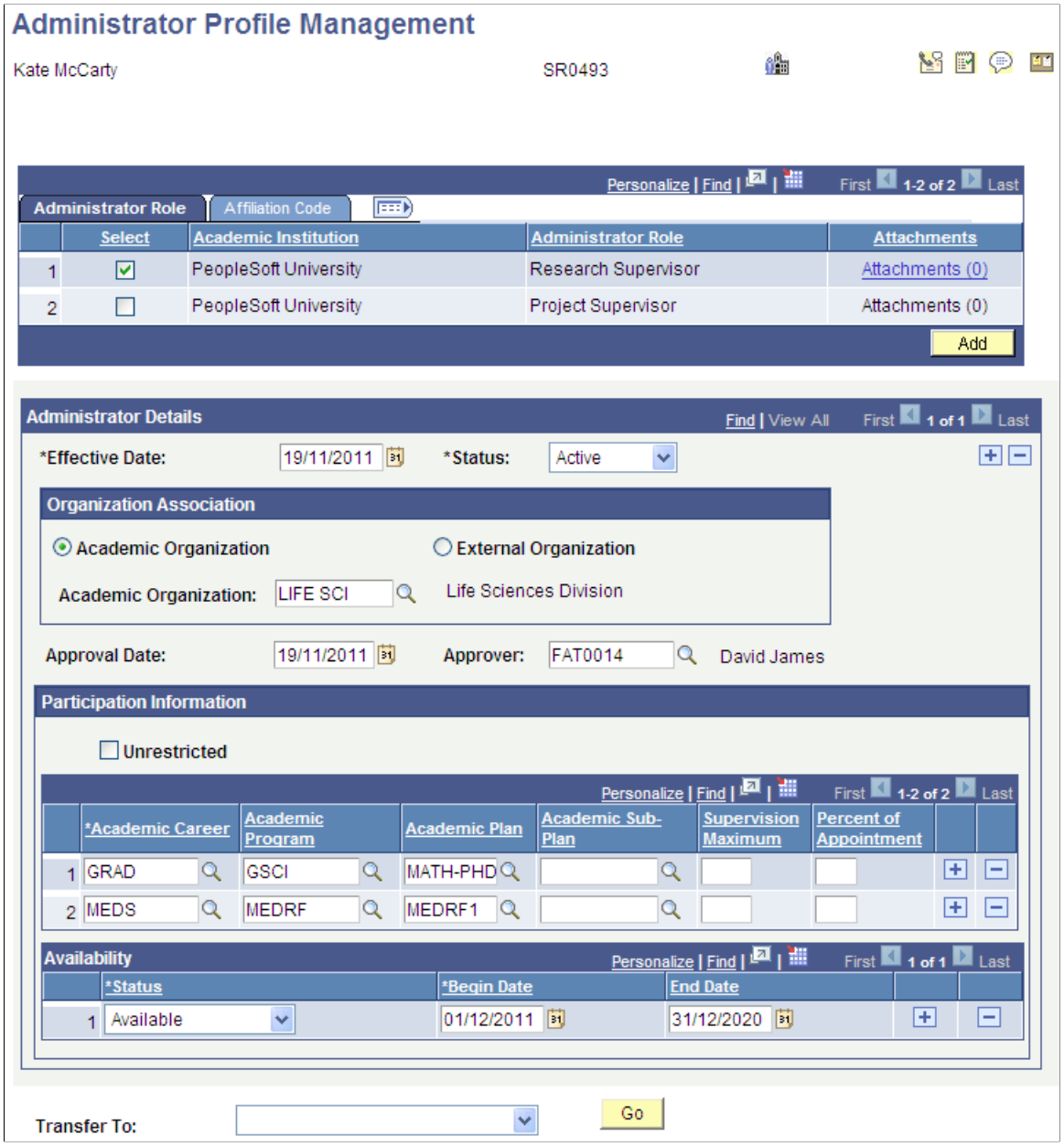
Defining and Managing Administrator Profiles

Access the Administrator Profile Management page (Records and Enrollment, Graduate Research Management, Administrator Profile, Administrator Profile Management).

Image: Administrator Profile Management page

This example illustrates the fields and controls on the Administrator Profile Management page. You can find definitions for the fields and controls later on this page.



Use this page to enter and track detailed information about administrators.

Research supervisors for whom a profile exists in the Administrator Profile component can be assigned to individual research candidates in the Candidate Management component (and similarly project supervisors in the Project Management component).

See Assigning Candidate Supervisors

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See Creating and Managing a Student Academic Project

Evaluators for whom a profile exists in the Administrator Profile component can be assigned to committees for use by the Student Evaluation feature during thesis evaluation. A view (SSR_ADMIN_EVALVW) is used in the Committee Type/Role setup – the view selects evaluators for whom data has been entered in the Approval Date and Approver fields on the Administrator Profile Management page.

See "Understanding Evaluation Management *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

For information about the Send Notification button,

See Using Online Notifications

Administrator Role

Define all the roles available for an administrator.

Select

Select an administrator role for which to enter and view details in the Administrator Details section. By default, the first role is selected.

Add

Click to add a role to the administrator's profile.

The values available in the Affiliation Code field on the Add Administrator Role page are the child affiliation codes (of root affiliation codes) or the root affiliation codes (if no children exist) that are mapped to an administrator role of Research Supervisor, Project Supervisor or Evaluator on the Academic Institution 10 page.

See "Mapping Affiliation Codes to Administrator Roles *(PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook)*"

Copy

When you click Add and enter a value in the Administrator Role field, the Copy button becomes available and you can copy settings from an existing administrator role to the new role.

Note: After you select an Administrator Role, enter the required Administrator Details data and save the page, an affiliation is associated with the person on the Add/Update Affiliations page.
If you change the Administrator Details Status to *Inactive,* the End Date field is populated on the Add/Update Affiliations page.
For these updates to the Affiliations page to occur, you must set up the appropriate Affiliations service operations through integration broker.

See Setting Up Integration Broker For Research Administrator Profile Affiliations

See"Understanding Affiliations *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

See"Defining Affiliations *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

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See "Adding and Updating Affiliations *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

Administrator Details

Academic Organization and **External Organization**	You must select an academic organization or an external organization.
Approval Date and **Approver**	Indicates that the administrator has met the qualifications to be assigned as a research supervisor or evaluator.
Unrestricted	Select this check box if the administrator can participate in all academic careers. Deselect this check box if participation is restricted to a specific academic career or to a specific academic career, program, plan, subplan combination. When you deselect the check box, the Academic Career, Academic Program, Academic Plan, Academic Sub-Plan, Supervision Maximum, and Percent of Appointment fields appear.
Academic Career	The academic career in which the supervisor can participate. This field is required for supervisors if you have deselected the Unrestricted check box.
Supervision Maximum	The maximum number of candidates that the supervisor can be assigned to supervise. This field is available for edit only if you have deselected the Unrestricted check box.
Percent of Appointment	Indicates the supervisor's availability to the role. This value cannot exceed 100; if it does, an error message is displayed. This field is available for edit only if you have deselected the Unrestricted check box.

Use the Transfer To field to go to other components and enter qualifications of the administrator.

Affiliation Code

Add affiliation codes to an administrator role.

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Defining Supervisor Roles

Access the Supervisor Roles page (Set Up SACR, Product Related, Student Records, Research Management, Supervisor Roles, Supervisor Roles).

Image: Supervisor Roles page

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

Use this page to define the role of the supervisor for a particular research candidature. Supervisor roles will also be used for the Student Academic Projects feature.

Note: Before Additional Features October 2012, this component was used to define supervisor types. Any values that you created in this component before Additional Features October 2012 may no longer apply in the new Supervisor Role definition. We anticipate that from now on (Additional Features October 2012) you will use affiliation codes and the Administrator Profile Management structure to define supervisors.

The values that you define here are available in the Supervisor Role field on the Supervisors page in the Candidate Management component and in the Candidature Details page in Admissions.

See Assigning Candidate Supervisors.

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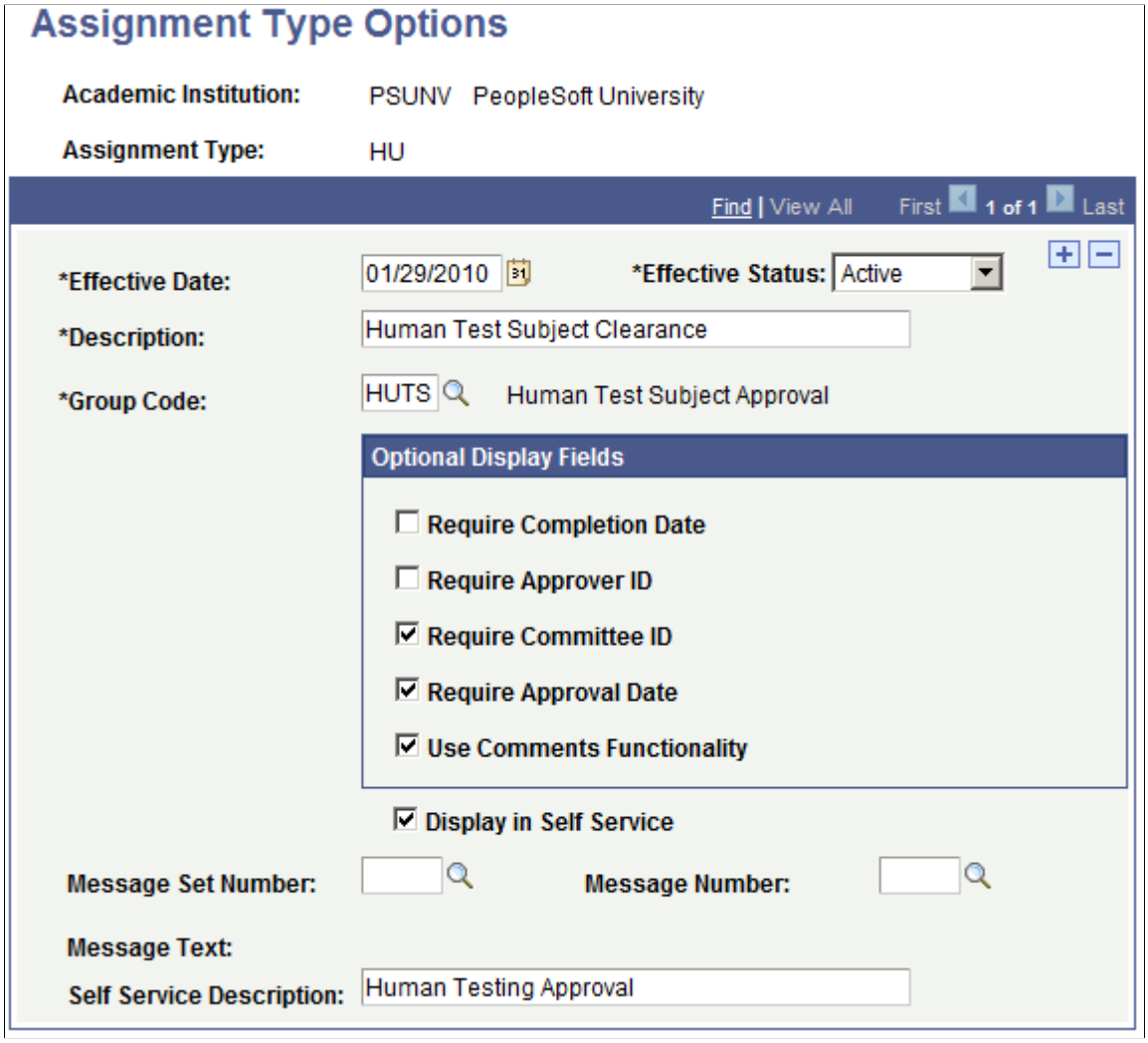
Defining Additional Business Assignments

Access the Assignment Type Options page (Set Up SACR, Product Related, Student Records, Research Management, Assignment Types, Assignment Type Options).

Image: Assignment Type Options page

This example illustrates the fields and controls on the Assignment Type Options page. You can find definitions for the fields and controls later on this page.



Institutions can define additional business requirements that can be assigned to their research candidates. Examples include:

- Animal testing clearance.
- Human testing approval.
- Intellectual property rights ownership.
- Graduate contract.

These assignments can be maintained in the Candidate Management component, on the Other Assignments page and in the Project Management component, Additional Details page.

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Assignment Type	The Business Assignment Type Code. The values are defined when the page is entered in Add mode.
Effective Status	Select *Active* to allow the row to be selected on the Candidate Management-Additional Requirements, Project Management-Additional Details and the Create Assignments pages.
Group Code	Assigns the specific set of status codes that can be used for this business requirement.
Display in Self Service	Select to display assignment type in the Candidate Center.
Message Set Number ,**Message Number**, and**Message Text**	The message text is instructional text that appears in the Candidate Center, My Research Projects region when the candidate hovers over the ? icon next to the assignment type name. You can configure the message using the PeopleTools Message Catalog component (PeopleTools, Utilities, Administration, Message Catalog) .
Self Service Description	Set an alternate description of the assignment type. This is used in the Candidate Center.

Optional Display Fields

Require Completion Date, Require Approver ID, Require Committee ID, Require Approval Date and **Use Comments Functionality**	Controls whether the Completion Date, Approver ID, Committee ID, Approval Date, and Comments fields appear on the Candidate Management-Other Assignments, Project Management-Additional Details, and Create Assignments pages.

Related Links

Tracking Additional Candidate Assignments
Creating Assignments for Multiple Students

Setting Up Research Service Requests

This section provides an overview of Research Service Requests and discusses how to:

- Use the Notifications framework for service request notifications.
- Use the Notifications framework for service item notifications.
- Set up research service request categories.
- Set up research service request types.
- Set up self-service research service requests.
- Set up service request assignments.

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Understanding Research Service Requests

Students can request services from their department such as a leave of absence, change of program, and extra time to complete a thesis. Administrators use the Service Request Management page to submit service requests on behalf of students. Alternatively, students can use self-service to submit service requests. After a student uses the self-service page to submit a service request, the administrator uses the Service Request Management page to take action on the submitted service request.

An administrator can also use the Service Request Dashboard self-service page to update the service requests assigned to him or her. For example, the administrator can use the dashboard to add comments to the assigned requests. The key difference between dashboard and Service Request Management page is that when an administrator signs into Campus Solutions, he or she can view all the service requests assigned to all the administrators (including himself or herself) on the Service Request Management page while the dashboard displays only the service requests assigned to the signed-in administrator. Another key difference is that an administrator cannot create a service request using the dashboard. To create a new service request, an administrator should use the Service Request Management page.

Service requests can be broadly classified under service request categories. Each service request category has different service request types. Each service request type may have subtypes. For example, an institution can define a service category *Applicant*. The Applicant category may have different types such as *Research Application* and *Request for Research Application Information*. The Research Application type may have different subtypes such as *Submit Offer Letter for Acceptance* and *Defer Application to a Future Term*.

When a student creates a service request from the My Service Requests page, the student first selects the service request category, then the type for the category, then the subtype for the type (if subtypes have been defined for the request type) and finally enters the request details such as a description of the service request. When an administrator creates a service request on the Service Request Management page, the administrator must provide the request category, request type for the request category, and the subtype for the request type (if defined). Once a service request has been entered, the request is automatically assigned to an administrator to review. Students can monitor the status of their requests using their self service page, or can be notified directly by the administrator. Service requests can also be created from the Candidate Center.

See:

- "Using Research Tracking Self Service *(PeopleSoft Campus Self Service 9.0 PeopleBook)*"
- Managing Service Requests
- "Creating and Updating Service Requests (Candidates) *(PeopleSoft Campus Self Service 9.0 PeopleBook)*"
- "Administering Service Requests (Administrators) *(PeopleSoft Campus Self Service 9.0 PeopleBook)*"

To set up service requests, use the Service Request Categories page to set up request categories. Then, for each request category, use the Service Request Type page to set up request types. Optionally, set up request subtypes for a request type on the Service Request Type page.

Additionally, use the Research Defaults Setup page to configure service request self service for students. Use the Service Request Assignment Setup page to control how service requests are assigned.

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Pages Used to Set Up Research Service Requests

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Request Categories	SSR_RS_REQSTCAT	Set Up SACR, Product Related, Student Records, Research Management, Service Request Categories	Set up service request categories for research applicants and candidates.
Service Request Type	SSR_RS_REQSTTYP	Set Up SACR, Product Related, Student Records, Research Management, Service Request Types, Service Request Type	Set up service request types for each service request category.
Research Defaults Setup	SSR_SS_REQSETUP	Set Up SACR, Product Related, Student Records, Research Management, Research Defaults Setup	Configure additional service request settings for self-service as well as default settings for Research Tracking.
Service Request Assignment Setup	SSR_RS_ASGN_SETUP	Set Up SACR, Product Related, Student Records, Research Management, Service Request Assignment, Service Request Assignment Setup	Set up the assignment of service requests.

Using the Notifications Framework for Service Request Notifications

Use the Notifications framework to set up service request notifications so that when a service request is created or reassigned, the system automatically sends a notification to the administrator to whom the request has been assigned/reassigned.

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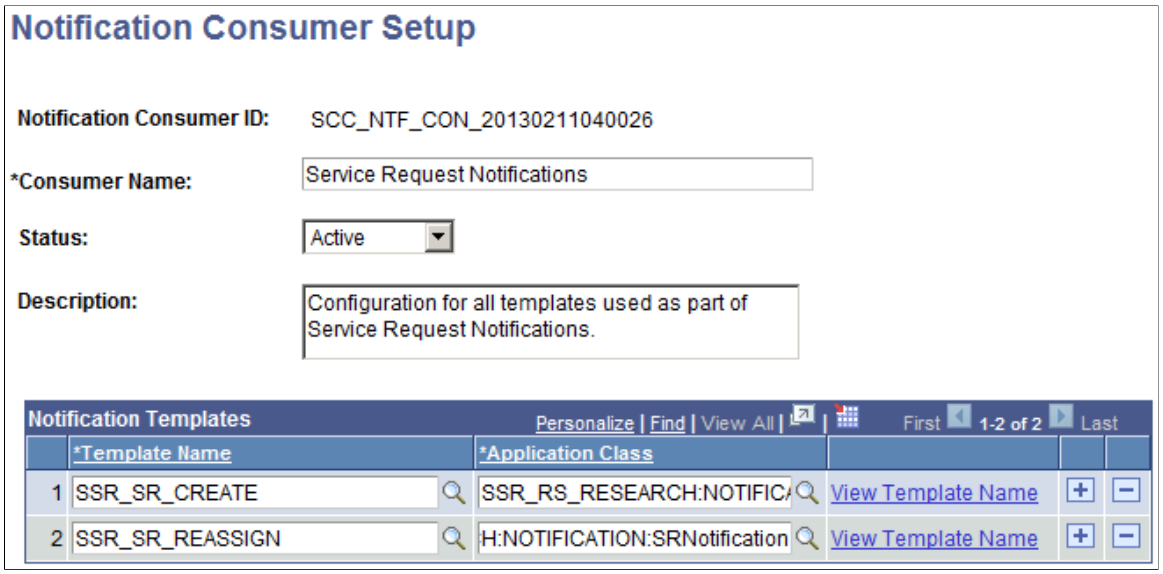
The Notification Consumer ID: SCC_NTF_CON_20130211040026 Service Request Notifications is delivered:

Image: Notification Consumer Setup page example for Service Requests

This example illustrates the fields and controls on the Notification Consumer Setup page example for Service Requests. You can find definitions for the fields and controls later on this page.



Delivered settings for Service Request Notifications:

Notification Trigger	*Template Name*	*Generic Template*	*Application Classes*	*Notes*
Entry of a new Service Request by a student or administrator from the Service Request pages.	SSR_RS_CREATE	SSR_RS_CREATE	SSR_RS_RESEARCH: NOTIFICATION: SRCreateTemplate Provider	You must use the delivered template name. You can change the notification to use a different notification channel instead of email. Use the sample generic template as an example for creating your own notification content. The sample template defines the available field variables that can be used in the notification message content.
Reassignment of an existing service request from the administrator Service Request pages.	SSR_RS_REASSIGN	SSR_RS_REASSIGN	SSR_RS_RESEARCH: NOTIFICATION: SRReassignTemplate Provider	See Notes in the row above.

Field variables provide context data that can be used when creating notification text. Following is a list of variables that are delivered with the SSR_RS_CREATE and SSR_RS_REASSIGN templates. To modify templates, go to PeopleTools, Workflow, Notifications, Generic Templates.

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Value	*Description*
%1	Recipient Name
%2	Recipient EmplID
%3	Service Request EmplID
%4	Student Name
%5	Institution
%6	Service Request ID
%7	Service Request Sequence
%8	Request Category
%9	Request Type
%10	Request Subtype
%11	Comment
%12	Status
%13	URL
%14	Research Candidate Number
%15	Request Date
%16	Approver ID
%17	Approver Name
%18	Service Request Assigned to EmplID
%19	Assigned to Name
%20	Action Date
%21	As of Date
%22	Request Number

Note: The list of variables contained in each message is delivered with your system and require extensive coding effort to be modified.

See Campus Community documentation, Setting Up and Consuming the Notifications Framework.

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Defining Notifications By Service Request Type

Request type-specific notifications are supported. When a service request is entered or reassigned and a notification has been set up for the request type, that specific notification is sent instead of the common notifications described above. In addition, a notification can be sent to the assigned administrator if the service request is updated by another person.

On the Notification Consumer Setup page, update the delivered Consumer Notification ID: SCC_NTF_CON_20130211040026 Service Request Notifications with any additional request type-specific notifications. For these templates, you must use the SSR_RS_RESEARCH:NOTIFICATION:SRTemplateProvider application class.

Then, on the Service Request Type page, add your templates to the service request types for which notification is required.

Notification Trigger	*Template Name*	*Generic Template*	*Application Classes*	*Notes*
When a service request has been created, reassigned, or updated by someone other than the request owner, the assigned administrator will receive a notification. Select the required trigger value on the Service Request Type page.	User Defined	User Defined	SSR_RS_RESEARCH: NOTIFICATION: SRTemplateProvider	These notifications use the same field variables as the SSR _RS_CREATE and SSR_RS_REASSIGN generic templates.

See Campus Community documentation, Setting Up and Consuming the Notifications Framework.

Related Links

Setting Up Research Service Requests

Using the Notifications Framework for Service Item Notifications

Use the Notifications framework to set up service item notifications so that when a service item is created from the Candidate Center, the system automatically sends a notification to a designated administrator.

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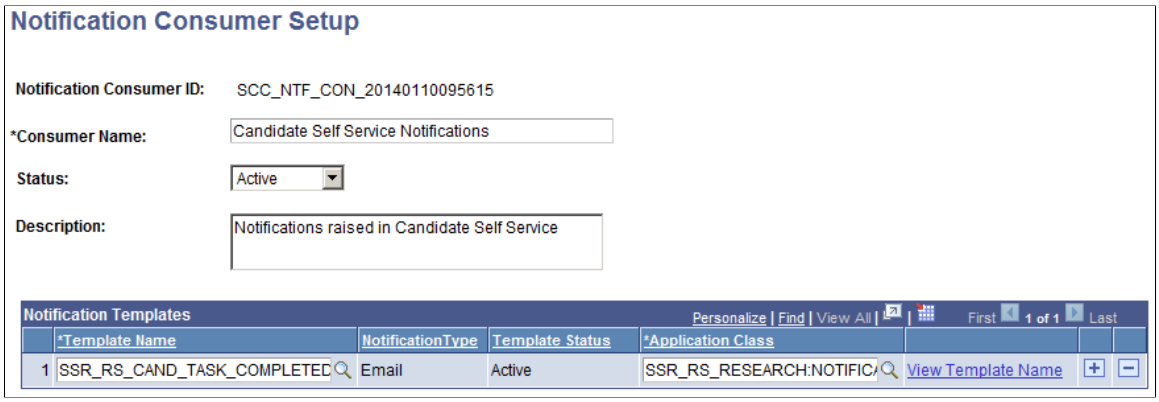
The Notification Consumer ID: SCC_NTF_CON_20140110095615 Candidate Self Service Notifications is delivered:

Image: Notification Consumer Setup page example for Service Items

This example illustrates the fields and controls on the Notification Consumer Setup page example for Service Items.



Delivered settings for Candidate Self Service Notifications:

Notification Trigger	*Template Name*	*Generic Template*	*Application Classes*	*Notes*
Entry of a new Research Service Item from the Candidate Center by the student.	SSR_RS_CAND_TASK_COMPLETED	SSR_RS_CAND_TASK_COMPLETED	SSR_RS_RESEARCH:NOTIFICATION:RSTaskTemplateProvider	Use the sample generic template as an example for creating your own notification content.

Field variables provide context data that can be used when creating notification text. Following is a list of variables that are delivered with the SSR_RS_CAND_TASK_COMPLETED generic template. To modify templates, go to PeopleTools, Workflow, Notifications, Generic Templates.

Value	*Description*
%1	Recipient Name
%2	Recipient EmplID
%3	Student EmplID
%4	Student Name
%5	Institution
%6	Candidate Number
%7	Service ID
%8	Service Label
%9	Comment
%10	URL

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Note: The list of variables contained in each message is delivered with your system and require extensive coding effort to be modified.

See Campus Community documentation, Setting Up and Consuming the Notifications Framework.

Setting Up Research Service Request Categories

Access the Service Request Categories page (Set Up SACR, Product Related, Student Records, Research Management, Service Request Categories).

Image: Service Request Categories page

This example illustrates the fields and controls on the Service Request Categories page. You can find definitions for the fields and controls later on this page.

Request Assigned To

Select any EmplID from the system. The selected ID is the designated administrator of last resort. When a service request is created and the system is unable to determine the appropriate administrator to whom to assign the request, this ID is used as the default.

Order Number

This field controls the sorting order of the category in the Select a Request Category self-service page. The system performs the sorting in ascending order. Default is 0.

Message Set Number, **Message Number** and **Message Text**

The message text that you select here appears when the mouse cursor is moved over the category in the Select a Request Category self-service page.

You can configure the message using the PeopleTools Message Catalog component (PeopleTools, Utilities, Administration, Message Catalog).

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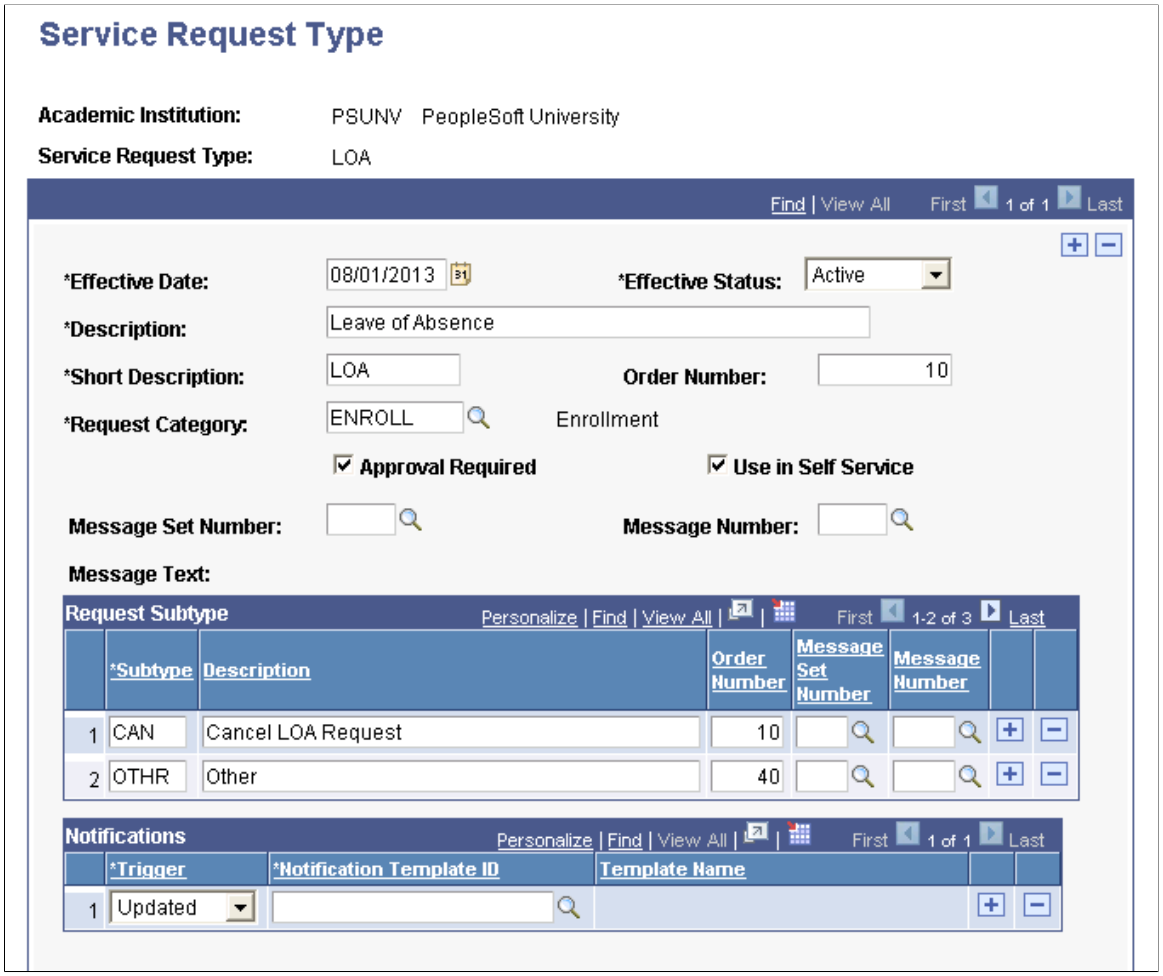
Setting Up Research Service Request Types

Access the Service Request Type page (Set Up SACR, Product Related, Student Records, Research Management, Service Request Types, Service Request Type).

Image: Service Request Type page

This example illustrates the fields and controls on the Service Request Type page. You can find definitions for the fields and controls later on this page.



The Service Request Type values that you set up here are available in the Service Request Management component for administrators as well as the Service Request Assignment Setup component. You can choose whether or not to make the Service Request Type available in self service for students.

See Managing Service Requests

See "Administering Service Requests (Administrators) *(PeopleSoft Campus Self Service 9.0 PeopleBook)*"

See "Creating and Updating Service Requests (Candidates) *(PeopleSoft Campus Self Service 9.0 PeopleBook)*"

Request Category Select the category to which the type belongs.

Approval Required The check box is informational-only.

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Use in Self Service	Select if you want the type (and its subtypes) to be made available in the Select a Request Type self-service page.
Order Number	This field controls the sorting order of the type in the Select a Request Type self-service page. The system performs the sorting in ascending order. Default is 0.
Message Set Number, **Message Number** and **Message Text**	The message text that you select here appears when the mouse cursor is moved over the type in the Select a Request Type self-service page. You can configure the message using the PeopleTools Message Catalog component.

Request Subtypes

Subtypes enable users to be more specific in the definition of the request (for example, Request type: Notice of intent to submit and Subtype: Request to extend submission date).

The fields for subtype are similar to the fields for the request type

Use of subtypes is optional. If you do not define a subtype, the Select a Request Subtype self-service page does not appear for the student (after the student selects a request type).

Notifications

Use this setup to define optional notifications by service request type. The administrator assigned to the service request receives the notification.

Trigger	Select the action that will initiate the corresponding notification template: • *Created:* A new service request is created. • *Reassigned:* An existing service request is reassigned to another administrator. • *Updated:* The service request record has been updated by another user.
Notification Template ID	The notification template ID prompts the templates setup for the Service Request Notifications consumer ID. Only templates associated with the SSR_RS_RESEARCH:NOTIFICATION:SRTemplateProvider application class can be used.

See Using the Notifications Framework for Service Request Notifications

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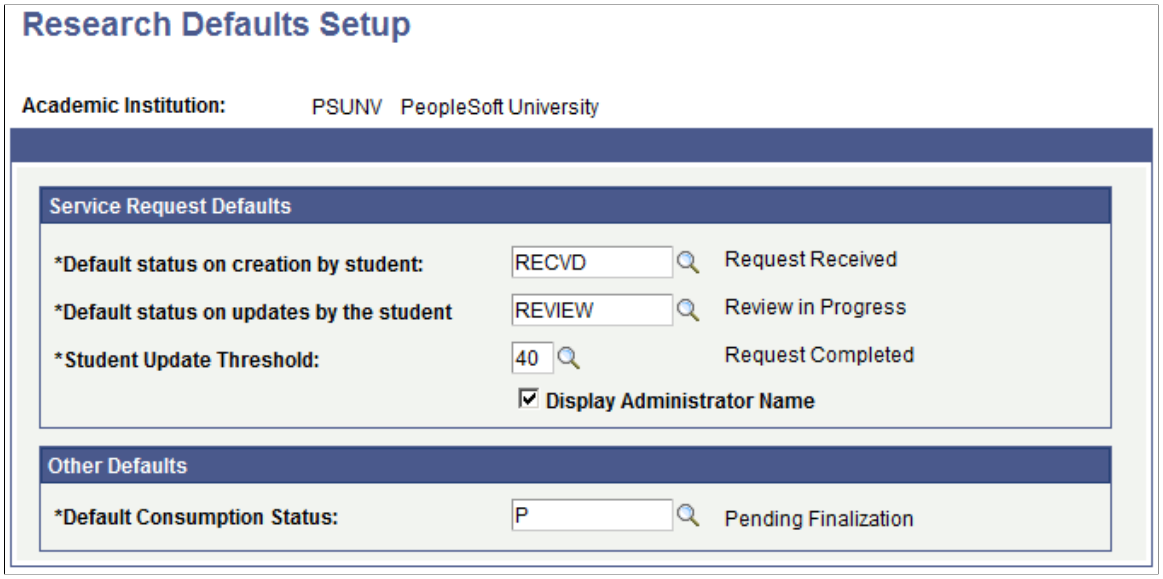
Setting Up Self-Service Research Service Requests

Access the Research Defaults Setup page (Set Up SACR, Product Related, Student Records, Research Management, Research Defaults Setup).

Image: Research Defaults Setup page

This example illustrates the fields and controls on the Research Defaults Setup page. You can find definitions for the fields and controls later on this page.



Service Request Defaults

Default status on creation by student Select the status which the system assigns to the new service request row when the student creates a new service request from self-service pages. This field prompts you with request status codes (System Usage = Request) from the Process Status Codes page.

Default status on updates by student Select the default status code that will be used when students update an existing service request.

Student Update Threshold Select a status code level value. These values are defined on the Process Status Codes page. The status code level value here indicates the maximum status code level at which a student can update a service request using My Service Requests. For example, a student cannot update a service request from the self-service page if the threshold here is set at 30, and the student's service request status code level value is greater than or equal to 30.

Note: Students can view service requests that they can no longer update.

Display Administrator Name Select this check box if you want the student's My Request Detail self-service page to display the administrator's name.

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If you do not select this check box, the My Request Detail page displays the text *Staff* instead of the administrator name to insure anonymity.

Other Defaults

Default Consumption Status

Select to assign an initial consumption status when the candidate record is created for the first time from a process that does not allow the user to manually set the value. The impacted processes are: Quick Admit, Student Program/Plan updates, and Program Addition.

Note: The impacted processes will display an error message for any new candidate records until this setting is completed.

Related Links

"Administering Service Requests (Administrators) (PeopleSoft Campus Self Service 9.0 PeopleBook)"

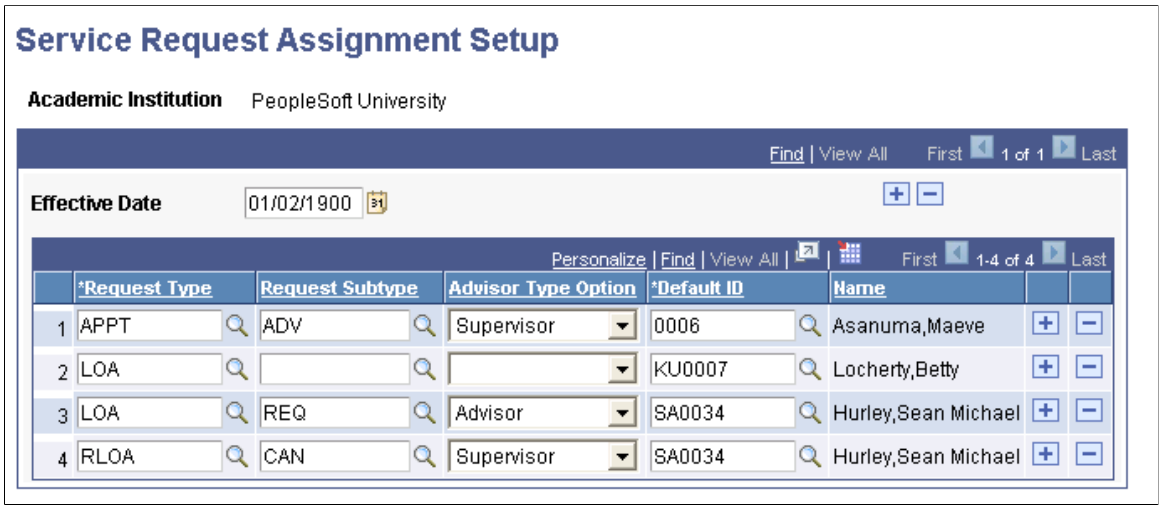
"Creating and Updating Service Requests (Candidates) (PeopleSoft Campus Self Service 9.0 PeopleBook)"

Setting Up Service Request Assignments

Access the Service Request Assignment Setup page (Set Up SACR, Product Related, Student Records, Research Management, Service Request Assignment, Service Request Assignment Setup).

Image: Service Request Assignment Setup page

This example illustrates the fields and controls on the Service Request Assignment Setup page. You can find definitions for the fields and controls later on this page.



Use this page to define how a service request is assigned to an administrator for review.

When a service request is entered, the system uses the service request type and subtype values to find matching values in the setup.

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If a matching row is found and if the Advisor Type Option is set, the system tries to find the student's academic advisor or research primary supervisor. If found, the system identifies the advisor and assigns the service request. If the advisor is not found (or if the Advisor Type Option was not set), the system assigns the Default ID as the administrator.

If a matching row is *not* found, the system searches for a row with a matching request type value and a blank request subtype and follows the same assignment logic if a match is found. If the system still does not find a match based on the preceding criteria, it then identifies the category of the service request and assigns the request to the administrator defined in that request category setup.

Beginning with bundle 33, the Rules Engine will perform the service request assignment functionality, with the rule following the parameters as previously described. If you require additional flexibility in how service requests need to be assigned in your institution, you can update the rule with your own business logic. The delivered rule is:

- Rule ID: SCC_RULE_ID_20140205065106
- Rule Name: "Service Request AssignedTo : Rule Trigger"
- Rule Category Name: Service Requests

For more information about the Rules Engine, see "Understanding the Rules Engine *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*".

Request Type and **Request Subtype**	Select a value from those defined on the Service Request Type page. See Setting Up Self-Service Research Service Requests.
Advisor Type Option	Select Advisor, Supervisor or leave the field blank. If you select Advisor, the system assigns service requests of this type/subtype to the candidate's Academic Advisor, as indicated on the Student Advisor page. See Assigning Academic Advisors to Students. If you select Research Supervisor, the system assigns service requests of this type/subtype to the candidate's primary Supervisor as indicated on the Candidate Management - Supervisors page (the Supervisor record with the Primary Supervisor check box selected). See Assigning Candidate Supervisors
Default ID	If you do not select an Advisor Type Option, the system assigns service requests of this type/subtype to the person that you select as the Default ID.

Setting Up Candidate Center

This section discusses how to:

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- Set up the My Research Projects region.
- Configure a Status Detail page.
- Set up the My Service Items region.
- Configure a service item.
- Set up the service item fields.

Pages Used to Set Up Candidate Center

Page Name	*Definition Name*	*Navigation*	*Usage*
Status Detail Window Setup	SSR_RS_CANDSS_STUP	Setup SACR, Product Related, Student Records, Research Management, Status Detail Window Setup	Set up the My Research Projects region in Candidate Center.
Status Field Setup	SSR_RS_POP_FLDSTP	Setup SACR, Product Related, Student Records, Research ManagementStatus Field Setup	Configure the information that appears in the various Status Detail pages from the My Research Projects region.
Service Window Setup	SSR_RS_TSKTABS	Setup SACR, Product Related, Student Records, Research Management, Service Window Setup	Set up the tabs that appear in the My Service Items region.
Service Item Setup	SSR_RS_TASK_SETUP	Setup SACR, Product Related, Student Records, Research Management, Service Item Setup	Create and configure service items.

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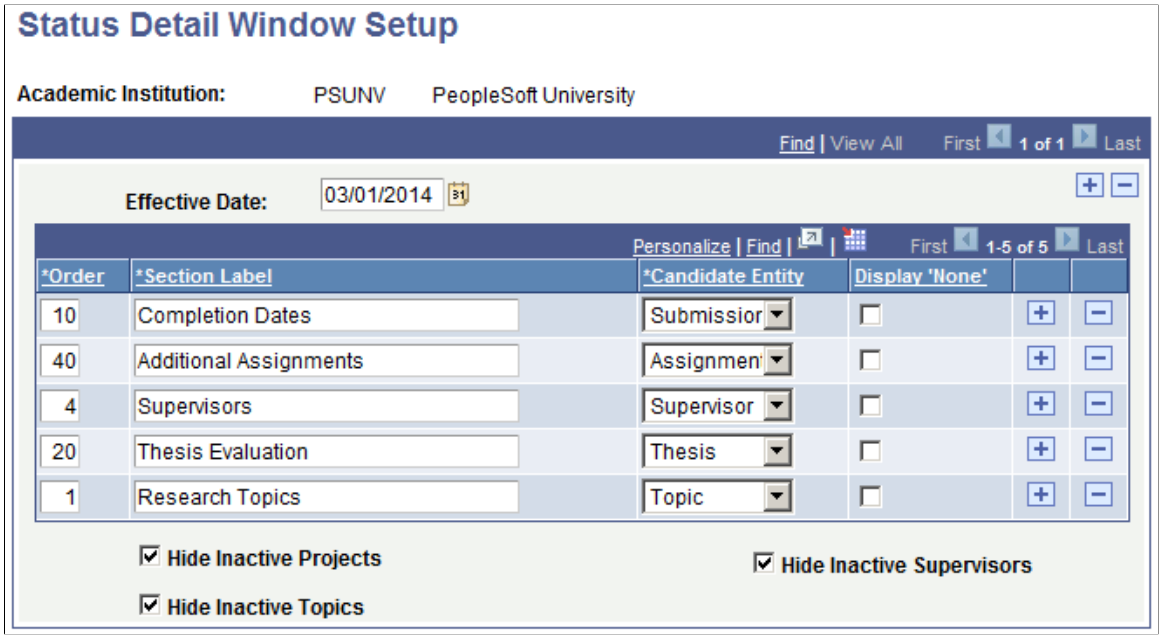
Setting Up the My Research Projects Region

Access the Status Detail Window Setup page (Setup SACR, Product Related, Student Records, Research Management, Status Detail Window Setup).

Image: Status Detail Window Setup Page

This example illustrates the fields and controls on the Status Detail Window Setup Page. You can find definitions for the fields and controls later on this page.



When candidates select a project in the My Research Projects region, information about the project appears. Use the Status Detail Window Setup page to identify the research entities that appear in the My Research Projects region.

Order	Indicates the order in which the research entities appear in the window.
Section Label	Assign the label to identify the content.
Candidate Entity	Set the corresponding entity to the section label. Each entity corresponds to candidate information displayed in the Candidate Management and Thesis Management components. The data from the selected entity will be used for the section. The list of values are: Assignment, Submission, Supervisor, Thesis, Topic.
Display 'None'	Select to display 'None' next to the section label if data does not exist for the entity. If you do not select this option, the section label will be hidden if data does not exist.
Hide Inactive Projects ,**Hide Inactive Supervisors** , and **Hide Inactive Topics**	Select to hide inactive records in the My Research Projects region. The Hide Inactive Projects option displays *only* research project records where the project's 'Assigned' status is set (visible in the Candidate Management Override page). The Hide Inactive

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Supervisors option displays *only* assigned supervisors where their current effective status is 'Active'. The Hide Inactive Topics option displays *only* assigned topics where their current effective status is 'Active'.

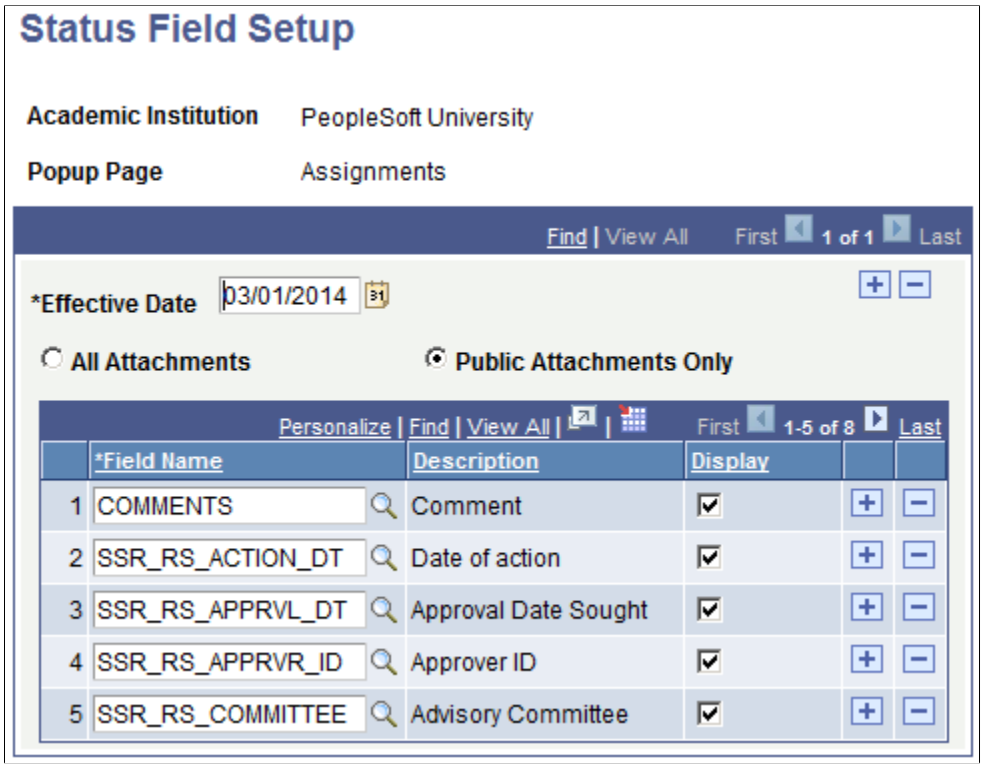
Configuring a Status Detail Page

When candidates click any link that appears in the My Research Projects region, a status detail page appears and displays current information about the selected link. Candidates could use this information to determine their current status, and whether any action may be required.

The following image shows an example of fields that are visible to candidates when they select an assignment link from the My Research Projects region.

Image: Status Field Setup for Assignments Status Detail Page (example)

This example illustrates the fields and controls on the Status Field Setup page for the Assignments Status Detail page (example). You can find definitions for the fields and controls later on this page.



Use the Status Field Setup page to configure the information that is visible to candidates.

All Attachments — Select to allow candidates to view all attachments associated with the selected detail page. Attachments can be viewed in the Candidate Management or Thesis Management components in their corresponding sections.

Public Attachments — Select to allow candidates to view *only* public attachments. This allows *only* attachments marked as 'Visible to Student' to be displayed.

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Display Select to display the field in the status detail page.

The following sections list the only fields that you can select to display in the corresponding status detail page.

Research Topic Status Detail Page

Field	*Description*
SSR_RS_TOPIC_ID	Topic Code
SSR_RS_RSRCH_TOPIC	Research Topic
SSR_RS_DESCRLONG	Topic Description
SSR_RS_THESIS_TITL	Thesis Title
SSR_RS_STATUS	Status
SSR_RS_ACTION_DT	Status Date
SSR_RS_TPCCMNT	Comments

Supervisor Status Detail Page

Field	*Description*
SSR_RS_SUPER_ID	Supervisor Name
SSR_RS_SUPER_TYPE	Supervisor Role
SSR_RS_PRI_SUPR	Primary Supervisor
SSR_RS_BEGIN_DT	Start Date
SSR_RS_END_DT	End Date
SSR_RS_SUPER_PRCNT	Supervision Percentage
ACAD_ORG	Academic Organization
SSR_RS_COMMITTEE	Advisor Committee
SSR_RS_STATUS	Status
SSR_RS_ACTION_DT	Status Date
COMMENTS	Comment

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Assignment Status Detail Page

Field	*Description*
SSR_RS_RQUIRE_TYPE	Assignment Type
SSR_RS_EXP_COMP_DT	Completion Date
SSR_RS_APPRVL_DT	Approval Date
SSR_RS_APPRVL_ID	Approver ID
SSR_RS_COMMITTEE	Advisory Committee
SSR_RS_STATUS	Status
SSR_RS_ACTION_DT	Status Date
COMMENTS	Comment

Consumption Status Detail Page

Field	*Description*
SSR_RS_BEGIN_DT	Begin Date
SSR_RS_LOAD	Research Load
SSR_RS_CAN_CNSMPTN	Consumption Method
SSR_RS_CNSMPTN_DAY	Total Days
SSR_RS_DAYS_REMNG	Days Remaining
SSR_RS_SUB_DT_MIN	Early Submission Date
SSR_RS_SUB_DT_MAX	Final Submission Date
SSR_RS_STATUS	Status
SSR_RS_ACTION_DT	Status Date
COMMENTS	Comment

Thesis Status Detail Page

Field	*Description*
SSR_RS_THESIS_TITL	Thesis Title

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Field	*Description*
SSR_RS_STATUS	Status
EFFDT	Effective Date
SSR_RS_INTD_SUB_DT	Intended Submission Date
SSR_RS_ACT_SUB_DT	Actual Submission Date
SSR_PROJ_DATE	Oral Defense Date
SSR_RS_NBR_SUBMIT	Number of Copies Submitted
SSR_RS_CERT_EMPLID	Certificate Approver
SSR_RS_NOITS_APRVL	Intent to Submit Approval
SSR_RS_CERTINT_FLG	Exam Initiated
SSR_RS_RETURN_FLG	Return of Thesis Requested
SSR_RS_DECLARE_FLG	Details Declared Correct
SSR_RS_CERT_SAPRVL	Exam Supervisor Approval
SSR_RS_COMPSEM_FLG	Ready for Completion Seminar
SSR_RS_EMBARGO_TYPE	Embargo Type
SSR_RS_EMB_STRT_DT	Embargo Start Date
SSR_RS_EMB_END_DT	Embargo End Date
SSR_RS_EX_PYMT_FLG	Examiner Payments Processed
SSR_RS_LIB_DEP_FLG	Library Submission Made
SSR_RS_CND_ADV_FLG	Candidate Advised
SSR_RS_GRDTN_FLG	Proceed to Graduation
COMMENTS	Comments

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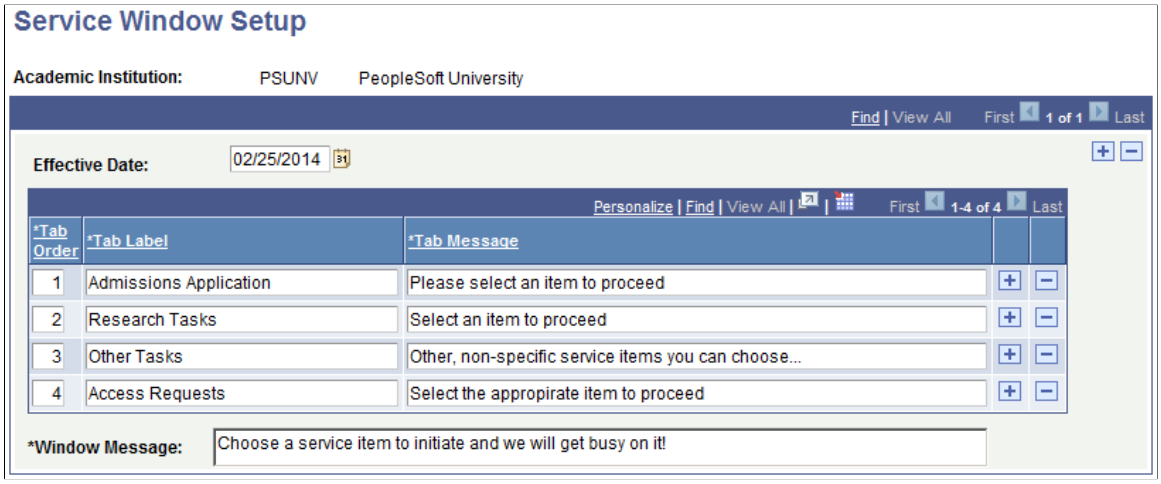
Setting Up the My Service Items Region

Access the Service Window Setup page (Setup SACR, Product Related, Student Records, Research Management, Service Window Setup).

Image: Service Window Setup Page

This example illustrates the fields and controls on the Service Window Setup Page. You can find definitions for the fields and controls later on this page.



Use the Service Window Setup page to add or remove the tabs that appear in the My Service Items region. At least one page tab must be defined. Use the page tabs to logically group service items. The tab labels should help candidates find the appropriate service item. You can create as many tabs as appropriate as well as the define the order in which the tabs appear. When a service item is created, administrators must indicate in which tab the service item appears.

Tab Message	Define the introductory text that appears in each tab.
Window Message	Define the introductory text that appears in the My Service Items region.

Configuring a Service Item

The My Service Items region enables research candidates to initiate a service item transaction. Service items can be:

- Research service items. These are transactions that allow candidates to directly update their candidature information without administrator intervention.
- Research service requests. These are requests that are assigned and processed by an administrator.

You use the Service Item Setup page to create both types of transactions that can be initiated by candidates in the Candidate Center. However, make sure you set up the service request categories, types, and subtypes before you configure service items for use in the Candidate Center. Also, exercise care when you configure research service items because these items allow candidates to update their candidature information.

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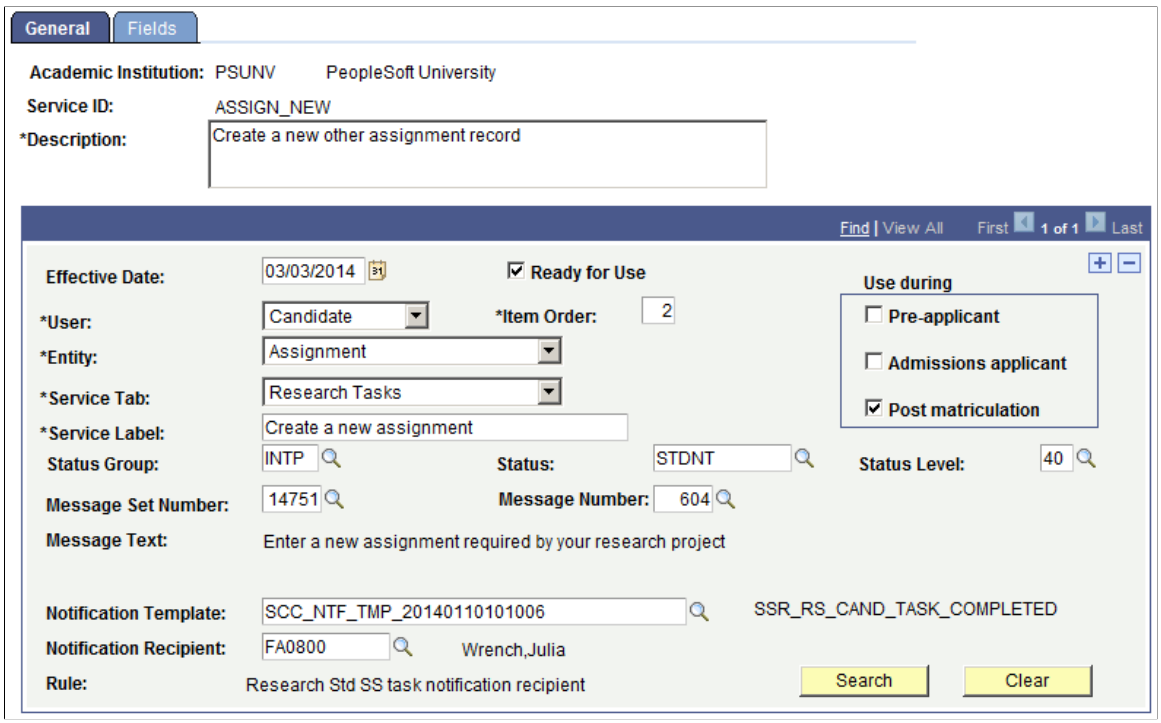
Configuring a Research Service Item

Access the Service Item Setup page (Setup SACR, Product Related, Student Records, Research Management, Service Item Setup).

Image: Service Item Setup for Research Service Item - General page

This example illustrates the fields and controls on the Service Item Setup for Research Service Item - General page. You can find definitions for the fields and controls later on this page.



Use the Service Item Setup — General page to configure the settings of a service item.

Service ID You enter this value when you add a service item.

Ready for Use Select if you want the service item to be available in the My Service Items region.

Use during A service item appears in the My Service Items region based on a student's enrollment status.

To display a service item accordingly, select one or more of the following conditions:

- *Pre-applicant* if a candidate record doe *not* exist for the selected student regardless of whether the student is active in other non-research programs.
- *Admissions applicant* if a candidate record exists for the selected student and a matching ACAD_PROG record for the candidate number does not exist, but a matching record is found in ADM_APPL_PROG.

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- *Post matriculation* if a candidate record exists for the selected student *and* a matching record for the candidate number is found in ACAD_PROG.

User

Select to assign a user. Candidate Center uses *only* service items whose users are set to Candidate.

Service Tab

Select to indicate the tab where the service item should appear.

Service Label

Set the name of the link label for the service item.

Item Order

This field controls the order in which the service item appears under the service tab. Service items are displayed in ascending order.

Status Group

Select so you can set the proper status code. Choices are filtered based on the Entity value.

Status

Sets the default value that is assigned when candidate records are updated. The values you can select depend on the Status Group you set.

Status Level

Use to prevent the candidate from updating their candidate and thesis information. Every research status code has an associated status level value. The status code level of the target entity must be less than this value, otherwise the service item cannot be submitted.

Entity

Select the research candidate entity that the service item should update. Select any one of the following:

- Topic
- Supervisor
- Submission (Consumption)
- Assignment
- Thesis
- Service Request. If you select this option, rather than update the student's candidate records, a new service request record will be created for the student.

Message Set Number, Message Number

Select the help text that appears when candidates hover over the Service Label in the My Service Items region.

Notification Template

Select the notification template that will be sent to the designated recipient of the service item.

Add your notification templates in the Notification Consumer Setup page, Consumer ID: SCC_NTF_CON_20140110095615 Candidate Self Service Notifications.

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Notification Recipient

If a rule is not used, this is the primary recipient of the notification generated by the creation of the research service item. If a custom rule is used to determine the notification recipient, this ID will be used if the rule cannot determine a recipient. Note that the recipient must grant notification permissions for email and SMS.

Rule

Shows the optional Rules Engine rule that can be used to determine the notification recipient. A sample rule exists that attempts to send the notification to the student's primary research supervisor. Use the Search and Clear buttons to manage the setting.

Sample Rule:

- Rule ID: SCC_RULE_ID_20140115033240
- Rule Name: Research Std SS task notification recipient
- Rule Category Name: Research Self Service Task

For information, see "Understanding the Rules Engine *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*".

Configuring a Research Service Request

If a service item is configured to create a service request, the notification fields on the page (Status Group, Status, Status Level, Notification Template, Notification Recipient, and Rule) will be hidden and two new fields will appear (Service Request Type, Service Request Subtype). This is because service requests have their own status and notification settings, and the new fields indicate the appropriate service request settings to use. In addition, the Fields page will be hidden. This is because a common service request entry form is used and does not require configuration. This is triggered when Entity is set to *Service Request*.

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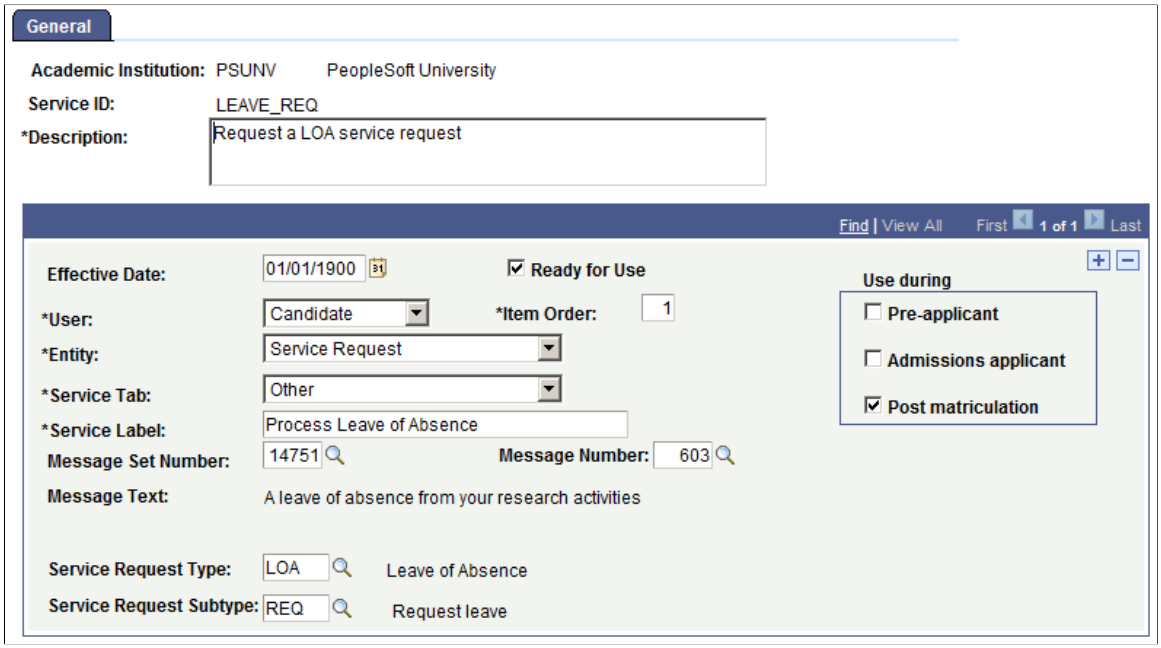
Access the Service Item Setup page (Setup SACR, Product Related, Student Records, Research Management, Service Item Setup).

Image: Service Item Setup for Research Service Request - General page

This example illustrates the fields and controls on the Service Item Setup for Research Service Request - General page. You can find definitions for the fields and controls later on this page.



The fields on the Service Item Setup for Research Service Request - General page are similar to the setup page for research service items except for the following:

Service Request Type This field appears when the Entity is 'Service Request'. Select the appropriate service request type for the service item.

Service Request Subtype This field appears when the Entity is 'Service Request'. Select the appropriate subtype (if any) for the service item.

Related Links

"Using Research Tracking Self Service (PeopleSoft Campus Self Service 9.0 PeopleBook)"

Setting Up Research Service Requests

Managing Service Requests

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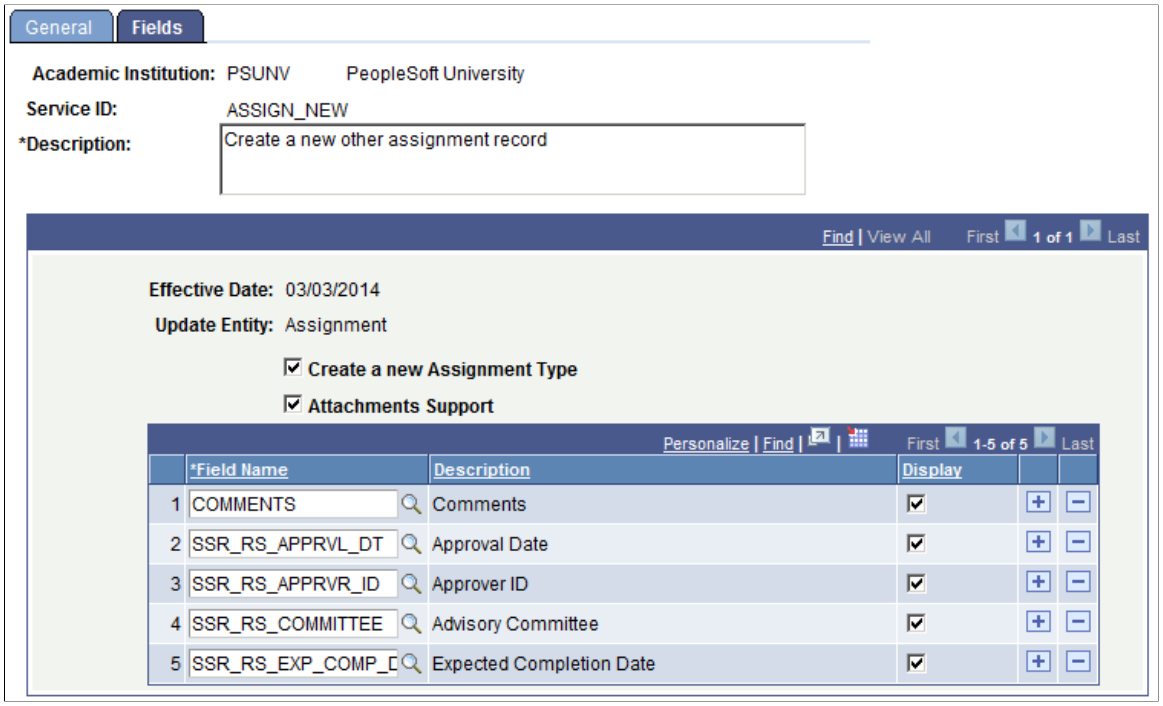
Setting Up the Service Item Fields

Access the Service Item Setup — Fields page (Setup SACR, Product Related, Student Records, Research Management, Service Item Setup, Fields).

Image: Service Item Setup — Fields Page

This example illustrates the fields and controls on the Service Item Setup — Fields Page. You can find definitions for the fields and controls later on this page.



Use the Service Item Setup — Fields Page to identify which fields and options are available to candidates when they initiate a service item. Depending on the value of the service item entity, additional options may be available.

Display Select to display the field in the service item status detail page.

You can enable these fields and options for the following service items:

Research Topic Optional Fields

Field	*Description*	*Notes*
Check box	Create a new Topic Sequence	If selected, this creates a new topic sequence. If deselected, the user will be required to select an existing research topic record to update..
Check box	Use Topic Search	Enables the Topic Search functionality. Generally used in conjunction with the Create a New Topic Sequence option.
Check box	Attachments Support	Enables the attachment functionality.

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Field	Description	Notes
SSR_RS_RSRCH_TOPIC	Research Topic	If selected, this field appears in the data entry page.
SSR_RS_DESCRLONG	Topic Description	
SSR_RS_THESIS_TITL	Thesis Title	
SSR_RS_TPCCMNT	Comments	

Supervisor Optional Fields

Field	Description	Notes
Check box	Create a new Supervisor Sequence	If selected, a new supervisor sequence is created. Otherwise, user will be required to select an existing supervisor record to update.
Check box	Use Supervisor Search	Enables the supervisor search functionality. Generally used in conjunction with the Create a New Supervisor Sequence option. This will record the EmplID of the supervisor.
Check box	Attachments Support	Enables the attachment functionality.
SSR_RS_BEGIN_DT	Supervision Begin Date	If selected, this field appears in the data entry page.
SSR_RS_END_DT	Supervision End Date	
SSR_RS_SUPER_PRCNT	Supervision Percentage	
SSR_RS_SUPER_TYPE	Supervisor Role	
SSR_RS_PRI_SUPR	Primary Supervisor	
COMMENTS	Comments	

Thesis Optional Fields

Field	Description	Notes
Check box	Attachments (Support)	Enables the attachment functionality.
SSR_RS_THESIS_TITL	Thesis Title	If selected, this field appears in the data entry page.
SSR_RS_INTD_SUB_DT	Intended Submission Date	

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Field	Description	Notes
SSR_RS_ACT_SUB_DT	Actual submission Date	
SSR_RS_NBR_SUBMIT	Number of Copies Submitted	
SSR_RS_NOITS_APRVL	Intent to Submit for Approval	
SSR_RS_DECLARE_FLG	Details Declared Correct	
SSR_RS_COMPSEM_FLG	Ready for Completion Seminar	
SSR_RS_RETURN_FLG	Return of Thesis Requested	
SSR_RS_EMBARGO_TYP	Embargo Type	
SSR_RS_EMB_STRT_DT	Embargo Start Date	
SSR_RS_EMB_END_DT	Embargo End Date	
SSR_PROJ_DATE	Oral Defense Date	
COMMENTS	Comments	

Consumption and Submission Date Optional Fields

Field	Description	Notes
Check box	Attachments Support	Enables the attachment functionality.
SSR_RS_BEGIN_DT	Begin Date	If selected, this field appears in the data entry page.
SSR_RS_LOAD	Consumption Load	
SSR_RS_SUB_DT_MIN	Early Submission Date	
SSR_RS_SUB_DT_MAX	Final Submission Date	
COMMENTS	Comments	

Assignments Optional Fields

Field	Description	Notes
Check box	Create a new Assignment Type	Select to allow any self-service-enabled assignment type to be used in creating a new assignment record. If not selected, the user will be prompted to select an existing assignment record to update.

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Field	Description	Notes
Check box	Attachments Support	Enables the attachment functionality.
SSR_RS_EXP_COMP_DT	Expected Completion Date	If selected, this field appears in the data entry page.
SSR_RS_APPRVL_ID	Approver ID	
SSR_RS_COMMITTEE	Advisory Committee	
SSR_RS_APPRVL_DT	Approval Date	
COMMENTS	Comments	

Setting Up Rules for Online Edits

The Rules Engine has been integrated for use in the Candidate Management, Thesis Management, and Academic Project Management components to support local business policies. Rules can be written to perform online editing of a student's project and display a warning message to administrator. A sample rule has been provided.

This section discusses how to:

- Set up rule types.
- Associate rule types with execution events.

Pages Used to Set Up Rules for Research Tracking

Page	Definition Name	Navigation	Usage
Rule Type Table	SSR_RS_RULE_TYPE	Set Up SACR, Product Related, Student Records, Research Management, Rule Types	Set up rule types.
Execution Event Rule Types	SSR_RS_EXEC_EVENT	Set Up SACR, Product Related, Student Records, Research Management, Execution Event Rules	Associate rule types with execution events.

Setting Up Rule Types

The Rule Type Table provides a link between Research Tracking-related features and the Rules Engine.

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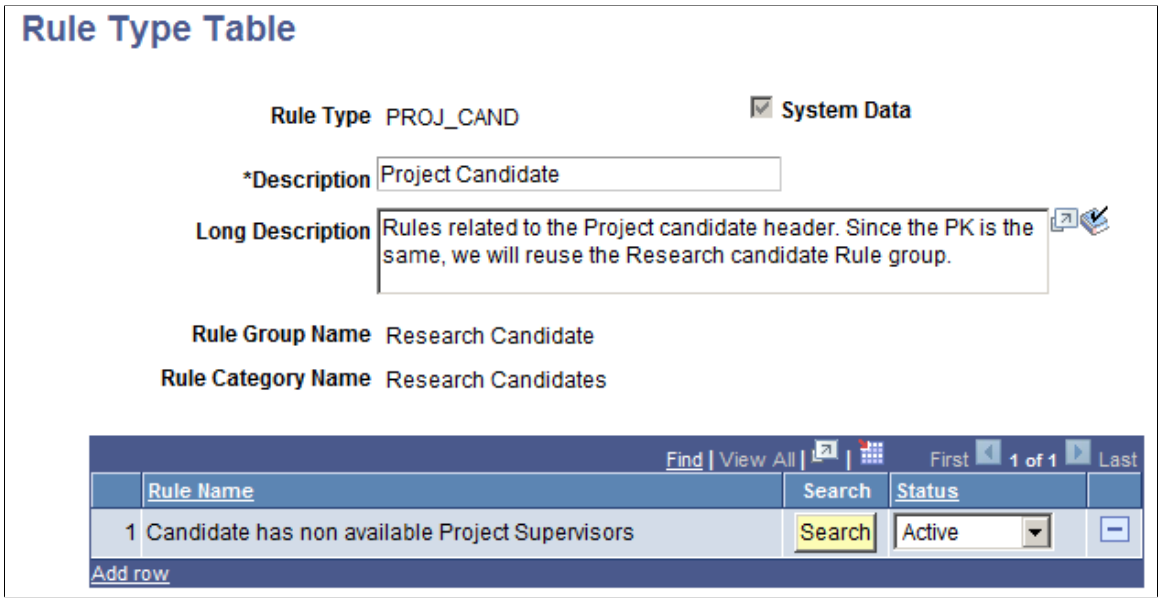
Access the Rule Type Table page (Set Up SACR, Product Related, Student Records, Research Management, Rule Types).

Image: Rule Type Table

This example illustrates the fields and controls on the Rule Type Table. You can find definitions for the fields and controls later on this page.



Rule Type and **Description** — Enter a Rule Type code (20 character limit) and a Description (30 character limit). For the research tracking and student academic project features, the rule groups used for on-line event triggers are predefined. New rules should be added to the appropriate rule group.

System Data — If a rule type is delivered as system data, this check box is selected and is not available for edit.

Rule Group ID, Search, Rule Group Name, and **Rule Category Name** — A Rule Type must be associated with a single Rule Group. When adding a new rule type, click the Search button to launch a search using a standard Rules Engine search utility. When you select a Rule Group ID, the Rule Group Name and Rule Category Name are displayed.

Copy — This button is available only when you add a new rule type. The copy feature provides a prompt against all rule types defined in the system, including those for which the System Data check box is selected (delivered rule types).

Delete — When a rule type is saved successfully, a Delete button is available. Delete is not available for rule types for which the System Data check box is selected.

Delivered Rule Types and Sample Rules

The delivered rule types for online edits are:

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- PROJ_CAND — Project Candidate
- RSCH_CAND — Research Candidate
- RSCH_CONS — Research Consumption
- RSCH_OTHR — Research Assignments
- RSCH_SUP — Research Supervisor
- RSCH_THES — Research Thesis
- RSCH_TOPC — Research Topic

The following rules are provided as samples to help you create your own rules. These sample rules are not intended for actual use.

Rule	***Conditions***
• Rule ID: SCC_RULE_ID_20140120084414 • Rule Name: Candidate has no available research Supervisors • Rule Category Name: Research Candidates • Rule Type: RSCH_CAND • Component: Candidate Management • PeopleCode Event: Component Post Build	When any of the following conditions are *not* met, a message about the supervisor's ineligibility appears: • Administrator profile record of the supervisor is active. • If the unrestricted check box is not selected, and the academic program *or* academic plan in the administrator profile matches the candidate header. • The current date is no longer within the supervisor's availability dates defined in the administrator profile page. Message: *One of the candidate's supervisors is no longer eligible to provide supervison (14751, 260).*
• Rule ID: SCC_RULE_ID_20140121001258 • Rule Name: Candidate has no available Project Supervisors • Rule Category Name: Research Candidates • Rule Type: PROJ_CAND • Component: Academic Project Management • PeopleCode Event: Component Post Build	
• Rule ID: SCC_RULE_ID_20140116235214 • Rule Name: Candidate has no active supervisors • Rule Category Name: Research Candidates • Rule Type: RSCH_CAND • Component: Candidate Management • PeopleCode Event: Component Post Build	A message appears when no record exists of at least one active supervisor record for the candidate. Message: *The candidate does not have an active supervisor (14751,263).*

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Rule	***Conditions***
• Rule ID: SCC_RULE_ID_20140206012715 • Rule Name: Compare Thesis Title • Rule Category Name: Research Candidates • Rule Type: RSCH_THES • Component: Thesis Management • PeopleCode Event: Component Post Build	A warning appears when the following conditions are met: • The topic *and* thesis record thesis title fields are not blank. • The current research topic status is equal to 'TF' - Title Finalized. Message: *Warning: Thesis Title doesn't match the Topic Title (14751,270)*

Associating Rule Types with Execution Events

Execution Event rule types determine how and when the Rules Engine is invoked in Research Tracking by tying rule types to a specific action that a user might take. The PeopleCode event referenced in the Execution Event definition is a pointer to the code that invokes the Rules Engine when the action occurs, such as user a clicking a button in the system. Each event in turn can invoke certain rule types, each of which can be set to active or inactive.

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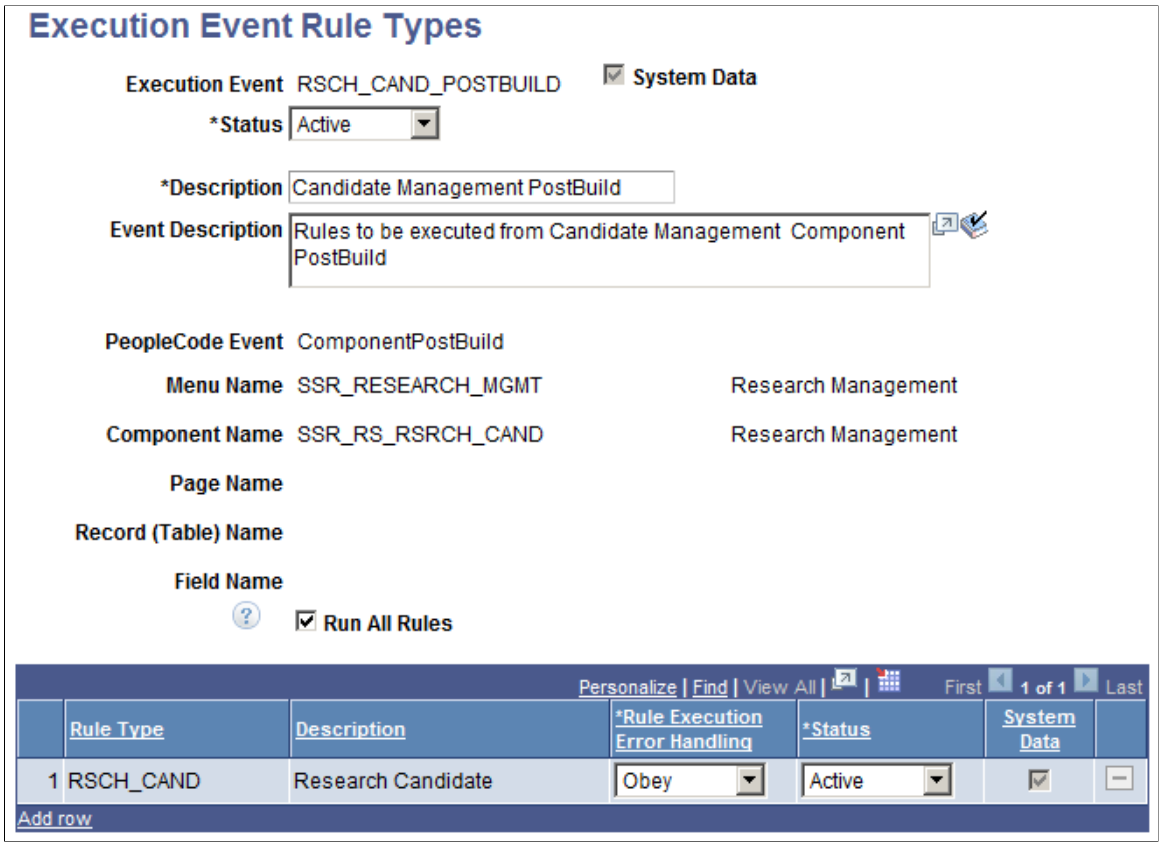
Access the Execution Event Rule Types page (Set Up SACR, Product Related, Student Records, Research Management, Execution Event Rules).

Image: Execution Event Rule Types Page

This example illustrates the fields and controls on the Execution Event Rule Types Page. You can find definitions for the fields and controls later on this page.



System Data This check box displays for Execution Event Rule Types definitions delivered by Campus Solutions Development.

Status Campus Solutions Development events are delivered as *Inactive.* Events must be *Active* for Rules Engine invocation to occur.

Copy This button is available only when you add a new execution event. The copy feature provides a prompt against all execution events defined in the system, including those for which the System Data check box is selected.

Delete When an execution event is saved successfully, a Delete button is available. Delete is not available for execution events for which the System Data check box is selected.

PeopleCode Event Select a value: *ComponentPostBuild, Field Change, Field Edit, Save Edit, SavePostChange,* or *Save Pre-Change.* The event selected here documents where the trigger PeopleCode that

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invokes the Rules Engine will be called from by the component processor.

Menu Name, Component Name, Page Name and **Field Name**

These fields are used to document the actual page/field location where the execution event will occur.

For the research tracking and student academic project features, the components that have been configured to support execution events are:

- Menu: SSR_RESEARCH_MGMT (Research Management)
- Components: SSR_RS_CAND (Candidate Management) and SSR_RS_THESIS (Thesis Management)
- Menu: SSR_PROJECT_MGMT (Academic Project Management)
- Component: SSR_PROJ_MGMT (Project Management)

Run All Rules

When this check box is deselected, rule execution stops when the first error is encountered. For example, if a student adds three courses to their planner in self-service and each of those courses has a Course Requisite rule attached to them, and the student fails the first requisite, an error is returned for the first requisite but the other two requisite rules are not checked. If the Run All Rules check box is selected, all three rules are executed.

Setting Up Online Notifications

The Online Notifications feature uses the Notifications framework to allow administrators to send notifications from select administrator pages to any person defined in the Campus Solutions database. Notification Consumer IDs and templates (sample and generic) are delivered. You must use the delivered Application Class.

Component/ Navigation	***Notification Consumer ID / Consumer Name***	***Sample Template***	***Sample Generic Template***	***Application Class***
Service Request Management (Records and Enrollment, Graduate Research Management, Service Request Management)	SCC_NTF_CON_ 20130925005259 Service Request Online Notifications	SCC_NTF_TMP_ 20130925003014 - Review Service Request	SSR_ONLINE_SREQ _EMAIL	SCC_COMMON: NOTIFICATION: BaseParameterProvider

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Component/ Navigation	***Notification Consumer ID / Consumer Name***	***Sample Template***	***Sample Generic Template***	***Application Class***
Administrator Service Request (Self Service page) (Records and Enrollment, Graduate Research Management, Service Request Dashboard)	SCC_NTF_CON_ 20130925010307 Admin SS Online Notifications	SCC_NTF_TMP_ 20130925004359 - Review Service Request SS	SSR_ONLINE_ ADMNSS_EMAIL	SCC_COMMON: NOTIFICATION: BaseParameterProvider
Candidate Management (Records and Enrollment, Graduate Research Management, Candidate Management)	SCC_NTF_CON_ 20130925005929 Candidate Mgmt Online Notifications	SCC_NTF_TMP_ 20130925003917 - Review Request	SSR_ONLINE_CAND _EMAIL	SCC_COMMON: NOTIFICATION: BaseParameterProvider
Candidate Management Override (Records and Enrollment, Graduate Research Management, Candidate Management Override)	SCC_NTF_CON_ 20130925005745 Candidate Mgmt Override Online Notifications	SCC_NTF_TMP_ 20130925003704 - Review Request	SSR_ONLINE_OVRD _EMAIL	SCC_COMMON: NOTIFICATION: BaseParameterProvider
Administrator Profile (Records and Enrollment, Graduate Research Management, Administrator Profile) (Records and Enrollment, Academic Projects, Administrator Profile)	SCC_NTF_CON_ 20130925010053 Admin Profile Online Notifications	SCC_NTF_TMP_ 20130925004112 - Review Admin Details	SSR_ONLINE_ ADPRF_EMAIL	SCC_COMMON: NOTIFICATION: BaseParameterProvider
Thesis Management (Records and Enrollment, Graduate Research Management, Thesis Management)	SCC_NTF_CON_ 20130925005440 Thesis Mgmt Online Notifications	SCC_NTF_TMP_ 20130925003223 - Thesis Review Request	SSR_ONLINE_ THESIS_EMAIL	SCC_COMMON: NOTIFICATION: BaseParameterProvider
Student Project Management (Records and Enrollment, Academic Projects, Student Project Management)	SCC_NTF_CON_ 20130925005546 Project Mgmt Online Notifications	SCC_NTF_TMP_ 20130925003433 - Project Review Request	SSR_ONLINE_PROJ_ EMAIL	SCC_COMMON: NOTIFICATION: BaseParameterProvider

See the product documentation for Campus Community, Setting Up and Consuming the Notifications Framework.

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The Send Notification button which launches the Create Notification page appears on the various pages in Research Tracking and Student Academic Project components (listed in the earlier table) only if the Notification Consumer ID defined for the component is set to *Active.* The Notification Consumer IDs are set to *Inactive* on delivery and need to be activated once the templates to be used have been set up.

Use the delivered sample templates and generic templates as examples for setting up your own notifications. We recommend that you use a naming convention that uniquely identifies online notifications from others defined in the Notification Framework setup. The generic template lists the available field variables that can be used to create your own notifications. These variables are values derived from the component from which the notification originates. All notification channels are supported. The template status must be set to *Active* in order to be selected in the Create Notification page.

See Creating Online Notifications.

Following is a list of the variables that are delivered with each generic template. Each set of variables is intended for use in a designated component.

Include these variables in the Template Variables section of the generic template to create context-specific online notifications. To modify templates, go to PeopleTools, Workflow, Notifications, Generic Templates.

Template variables for Service Request Management notifications:

Value	***Description***
%1	Student ID
%2	Sender Name
%3	Student Name
%4	Recipient Name
%5	Status
%11	Comments
%28	Request Type
%29	Request Subtype
%50	Additional Comments / Free text

Template variables for Administrator Service Request notifications (accessed from the Service Request dashboard):

Value	***Description***
%1	Student ID
%2	Sender Name

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Value	Description
%3	Student Name
%4	Recipient Name
%5	Status
%11	Comments
%28	Request Type
%29	Request Subtype
%50	Additional Comments / Free text

Template variables for Candidate Management notifications:

Value	Description
%1	Student ID
%2	Sender Name
%3	Student Name
%4	Recipient Name
%7	Candidate Number
%8	Academic Program
%9	Academic Plan
%13	Academic Career
%50	Additional Comments / Free text

Template variables for Candidate Management Override notifications:

Value	Description
%1	Student ID
%2	Sender Name
%3	Student Name
%4	Recipient Name
%7	Candidate Number
%8	Academic Program

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Value	Description
%9	Academic Plan
%14	Candidate Career
%15	Candidate Program
%16	Candidate Plan
%17	Program Status
%18	Admission (Application) Program
%19	Admission (Application) Plan
%20	Admission Status
%21	Review Required
%22	Messages
%50	Additional Comments / Free text

Template variables for Administrator Profile notifications:

Value	Description
%1	Student ID
%2	Sender Name
%3	Student Name
%4	Recipient Name
%26	Administrator Type
%27	Administrator Role
%50	Additional Comments / Free text

Template variables for Thesis Management notifications:

Value	Description
%1	Student ID
%2	Sender Name
%3	Student Name
%4	Recipient Name

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Value	***Description***
%5	Thesis Status
%6	Thesis Title
%7	Candidate Number
%8	Academic Program
%9	Academic Plan
%10	Submission Number
%11	Comments
%12	Evaluation Status
%50	Additional Comments / Free text

Template variables for Student Project Management notifications:

Value	***Description***
%1	Student ID
%2	Sender Name
%3	Student Name
%4	Recipient Name
%5	Project Status
%6	Project Title
%7	Project Number
%8	Academic Program
%9	Academic Plan
%10	Submission Number
%11	Comments
%12	Evaluation Status
%23	Term
%24	Session
%25	Class Number

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Value	*Description*
%50	Additional Comments / Free text

Note: The list of variables contained in each message is delivered with your system and require extensive coding effort to be modified.

See the product documentation for Campus Community, Setting Up and Consuming the Notifications Framework

Entering Ad Hoc Comments on the Create Notification Page

Besides providing template variables to include information on the originating page, online notifications also support the capture and sending of ad hoc text entered by the user. The %50 template variable performs this function. If used in a template, the Create Notification page automatically renders a comment box. The text entered by the user is then used in the notification like a regular template variable. We recommend using this feature only in the message body and not in the message Subject line.

See Creating Online Notifications.

Setting Up Integration Broker For Research Administrator Profile Affiliations

The configuration steps outlined here are specific to administrators created using the Administrator Profile Management component used for Research Tracking (or Student Academic Projects) and cannot be extended for any other Campus Solutions feature.

It is assumed that basic Integration Broker setup is complete and working. For example, you have already set up your Integration Gateway.

See the product documentation for *PeopleTools: Integration Broker*

Note: Setting up Integration Broker is a technical task. Functional users should not perform this task.

Integration Broker Setup for Research Administrator Profile Affiliations

Complete the following Integration Broker steps to ensure that Research Supervisor functionality works as expected.

Note: This setup is a requirement for the Student Academic Projects feature.

1. Integration Broker Message:

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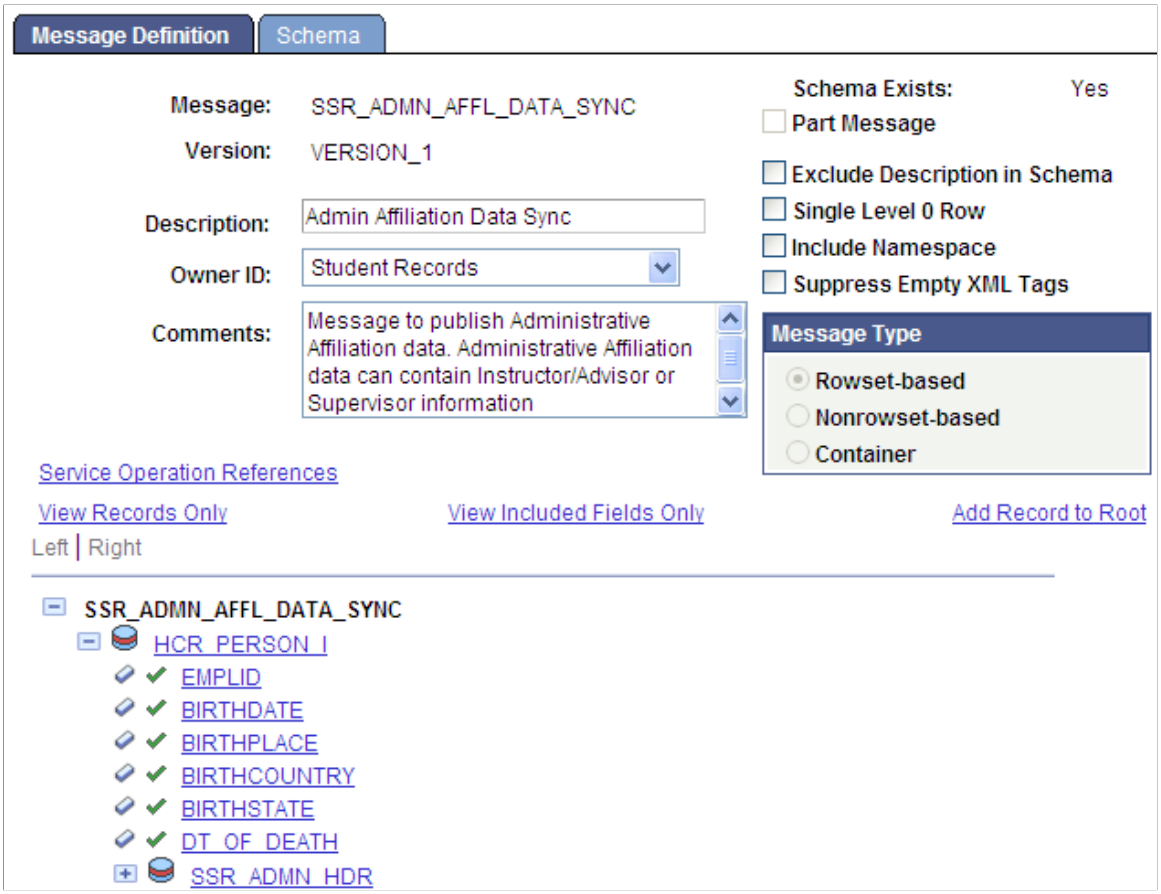
PeopleTools, Integration Broker, Integration Setup, Messages, Message Definition

Image: Message Definition page

A Message Definition is delivered for processing affiliations created through the Administrative Profile Management component. This is a rowset-based message. Verify that the message SSR_ADMN_AFFL_DATA_SYNC is available in your database and that schema exists for the message. Refer to the following example:



Note: If the Schema does not exist, generate the schema using the Message Schema Builder.

2. Integration Broker Service:

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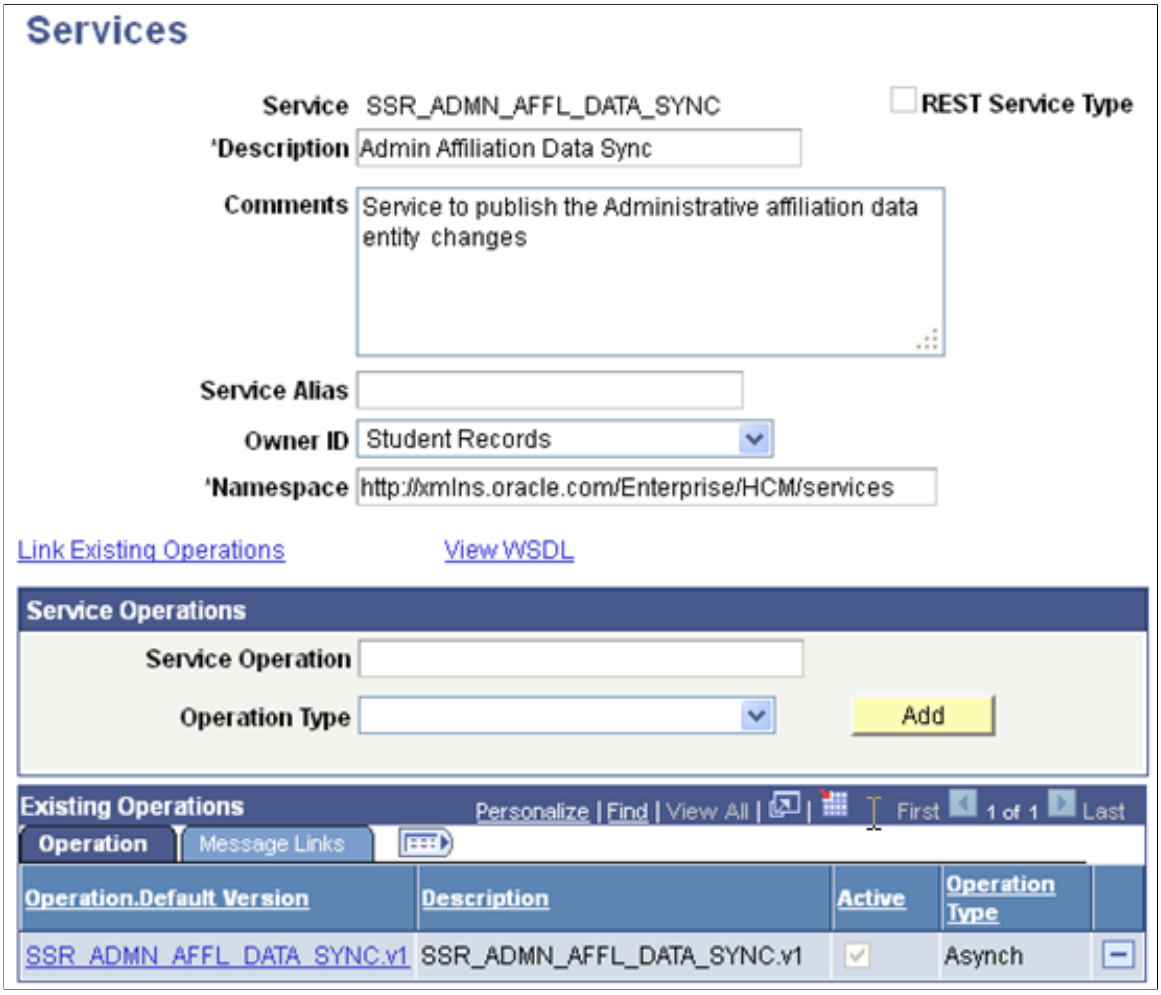
PeopleTools, Integration Broker, Integration Setup, Services

Image: Services page

An Integration Broker Service definition is created to communicate with the Affiliation framework. Verify that the Service definition SSR_ADMN_AFFL_DATA_SYNC is available in your database.



3. Integration Broker Service Operation:

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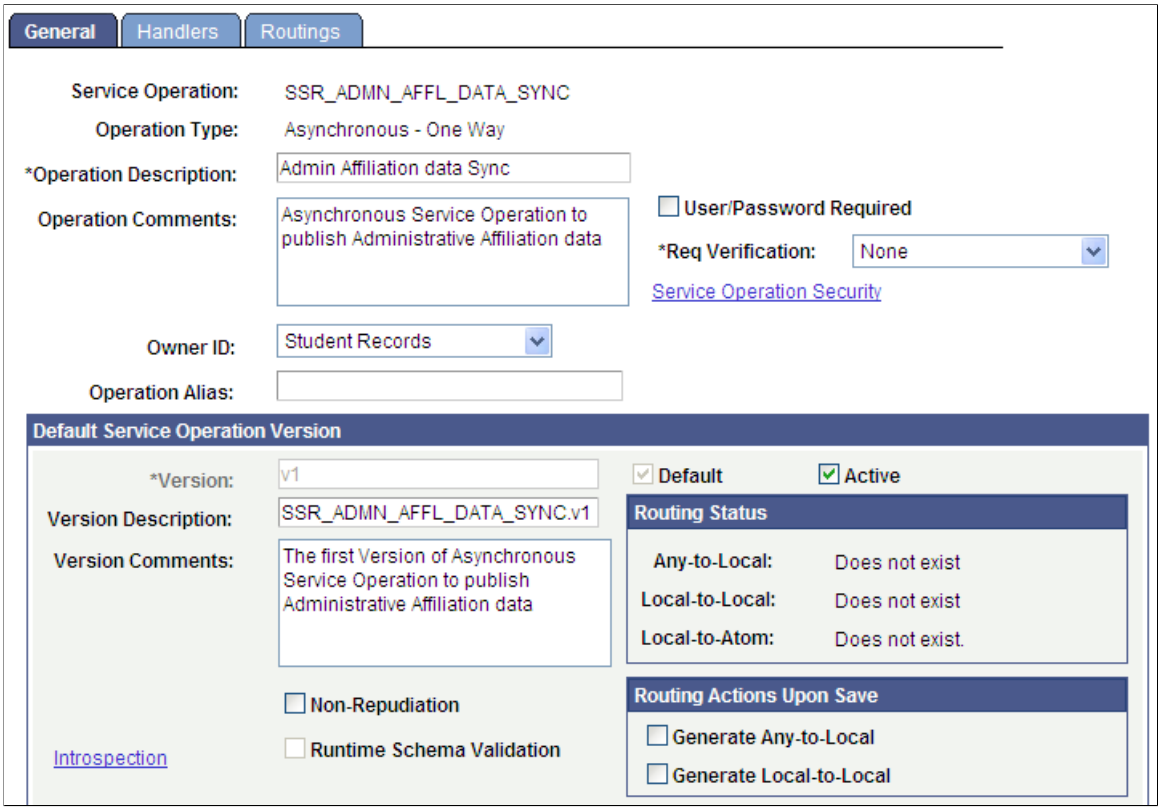
PeopleTools, Integration Broker, Integration Setup, Service Operations, General

Image: General (SSR_ADMN_AFFL_DATA_SYNC) page

An Integration Broker Service Operation is created to communicate with the Affiliation framework. Verify that the Service Operation definition SSR_ADMN_AFFL_DATA_SYNC is available in your database.

Select the Active check box.



After the Service Operation is Active, perform the following steps:

1. Generate Local-to-Local routing.

When you select the Generate Local-to-Local check box the Local-to-Local value appears. Additionally, system generated Routing information is populated on the Routings page.

2. Set up Security.

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Click the Service Operation Security link to access the Web Service Access page and assign one or more permission lists to the service operation.

Image: Web Service Access page

This example illustrates the Web Service Access page as explained above.

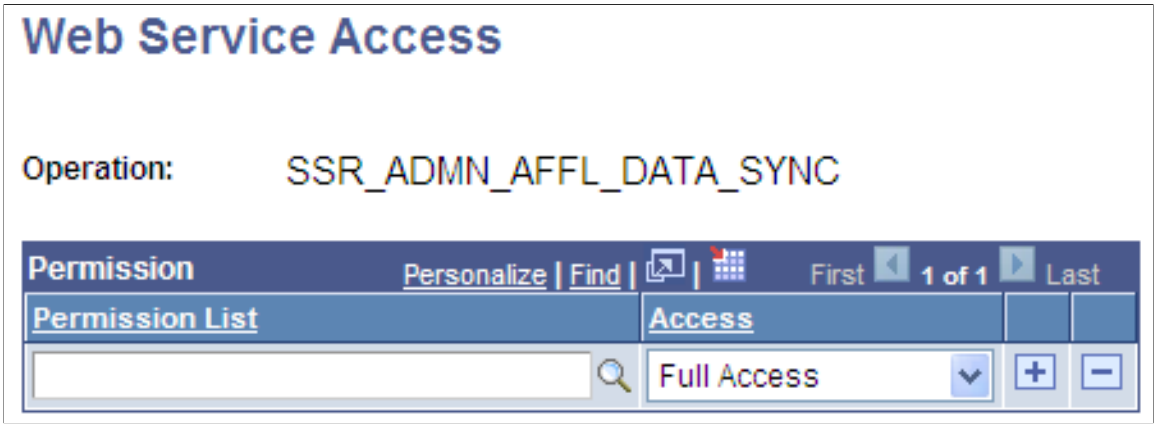
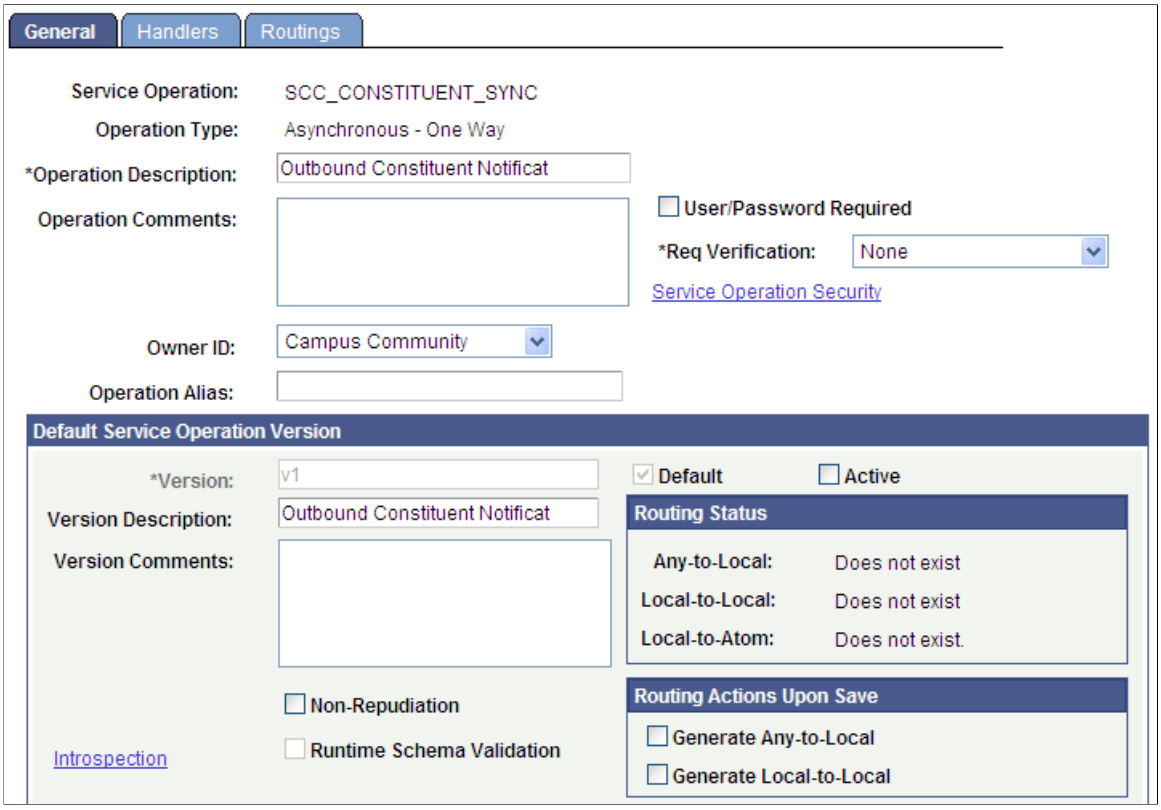


Image: General (SCC_CONSTITUENT_SYNC) page

Additionally, ensure that the following Service Operation which is available in your database (SCC_CONSTITUENT_SYNC) is also Active and Service Operation Security has been set up.



4. Integration Broker Service Operation Handler

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PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers

Image: Handlers (SSR_ADMN_AFFL_DATA_SYNC) page

An Integration Broker Service Operation Handler is delivered to support integration with the Affiliation framework. Verify that the following handler definition is available in your database.

Set the status to Active.

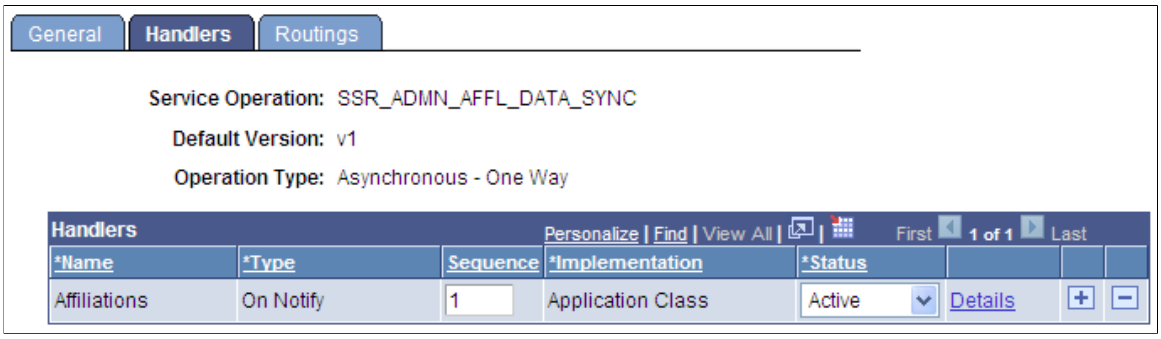
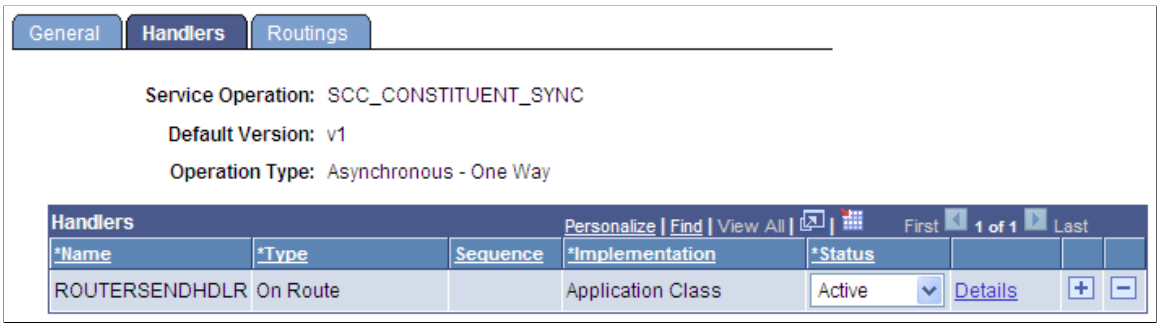


Image: Handlers (SCC_CONSTITUENT_SYNC) page

Additionally, set the following Integration Broker Service Operation Handler to Active:



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5. Service Operation Routing

Image: Routings (SSR_ADMN_AFFL_DATA_SYNC) page

Review the Service operation routing and note the local routing that was automatically generated when you saved the operation.

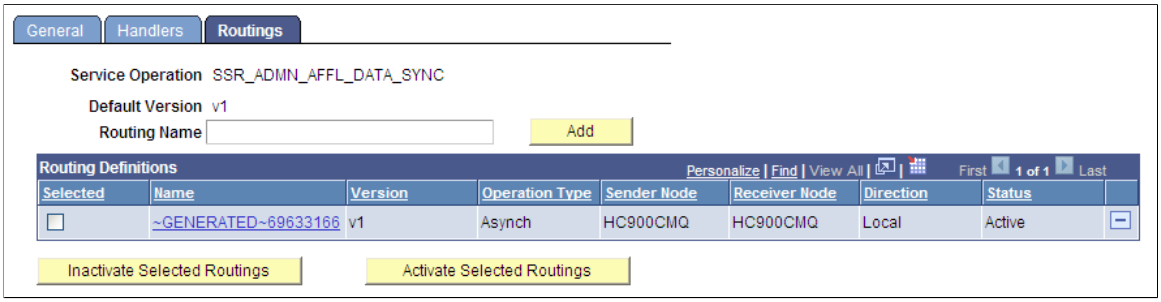
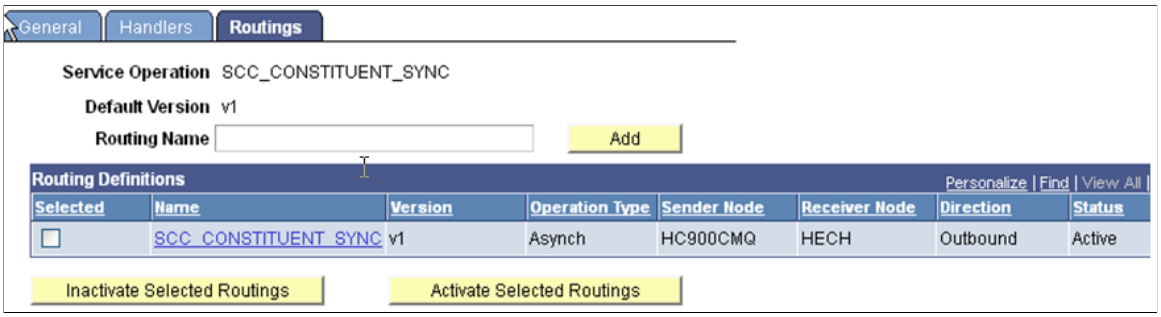


Image: Routings (SCC_CONSTITUENT_SYNC) page

Additionally, review the Service operation routing and note the local routing that was automatically generated when you saved the operation for SCC_CONSTITUENT_SYNC.



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6. Service Operation Queue Definition

Image: Queue Definition (SSR_ADMN_AFFL_DATA_SYNC) page

A queue definition is delivered to support integration with the Affiliation framework. Verify that the following handler definition is available in your database.

Set the Queue Status to Run.

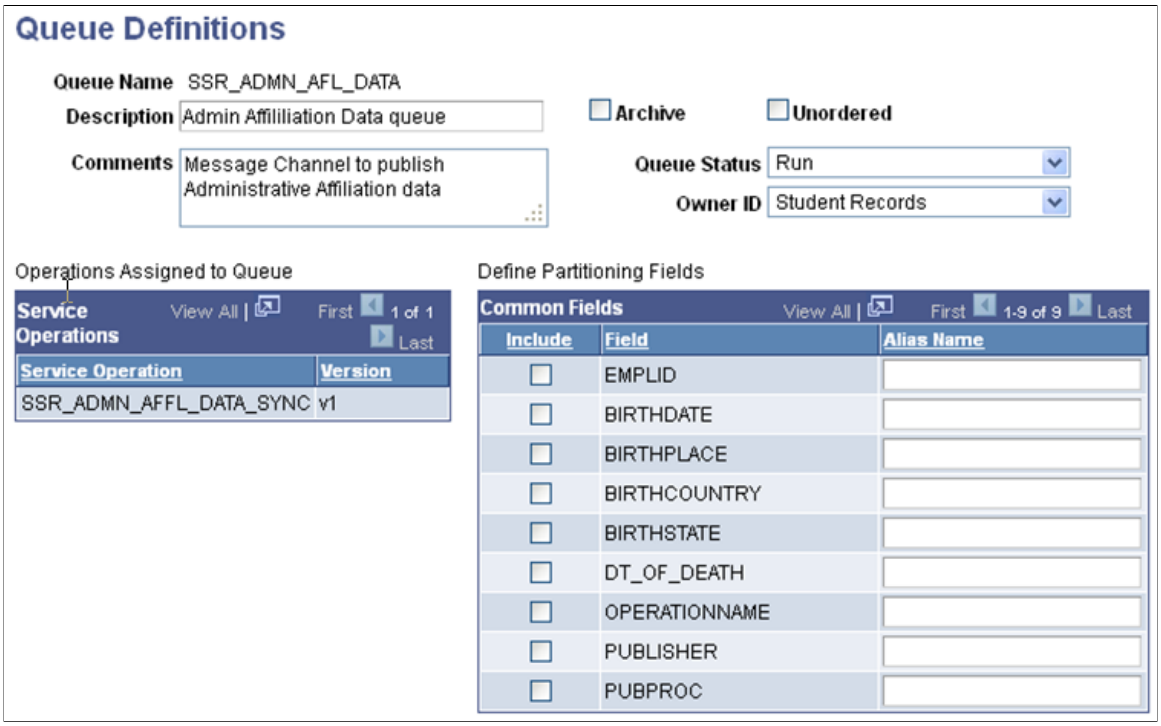

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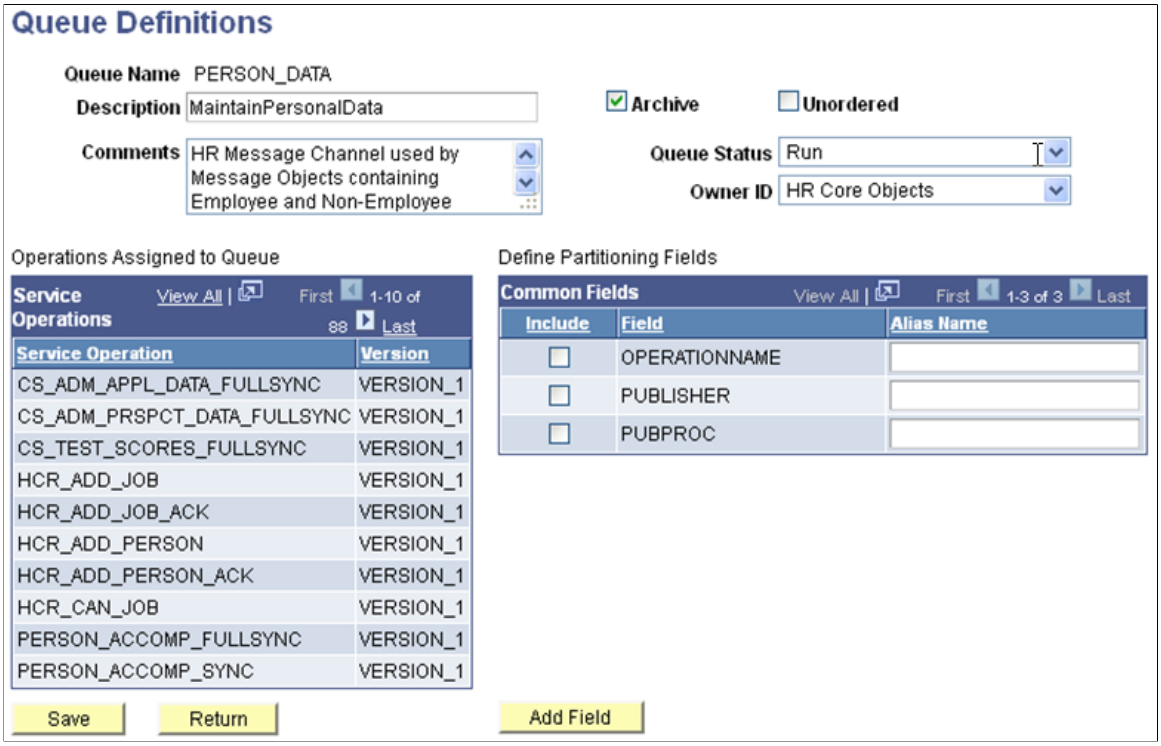
Image: Queue Definition (PERSON_DATA) page

Additionally, set the Queue Status to Run for the following queue definition (PERSON_DATA):



7. Constituent Event Registry

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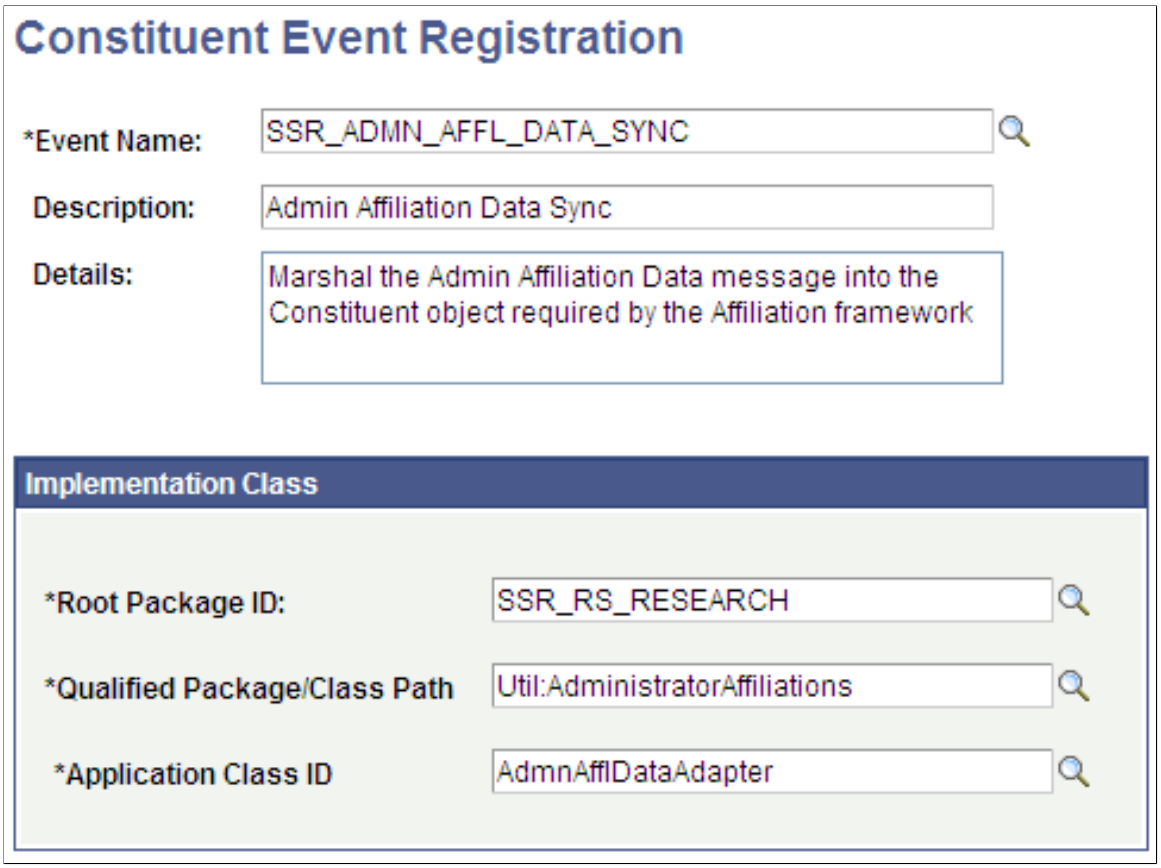
Setup SACR, System Administration, Utilities, Constituent Management, Constituent Event Registration

Image: Constituent Event Registration page

A Constituent Event (SSR_ADMN_AFFL_DATA_SYNC) is registered to support integration with the Affiliation framework. Verify that following entry is available in your database.



8. SOA Framework Event Registry

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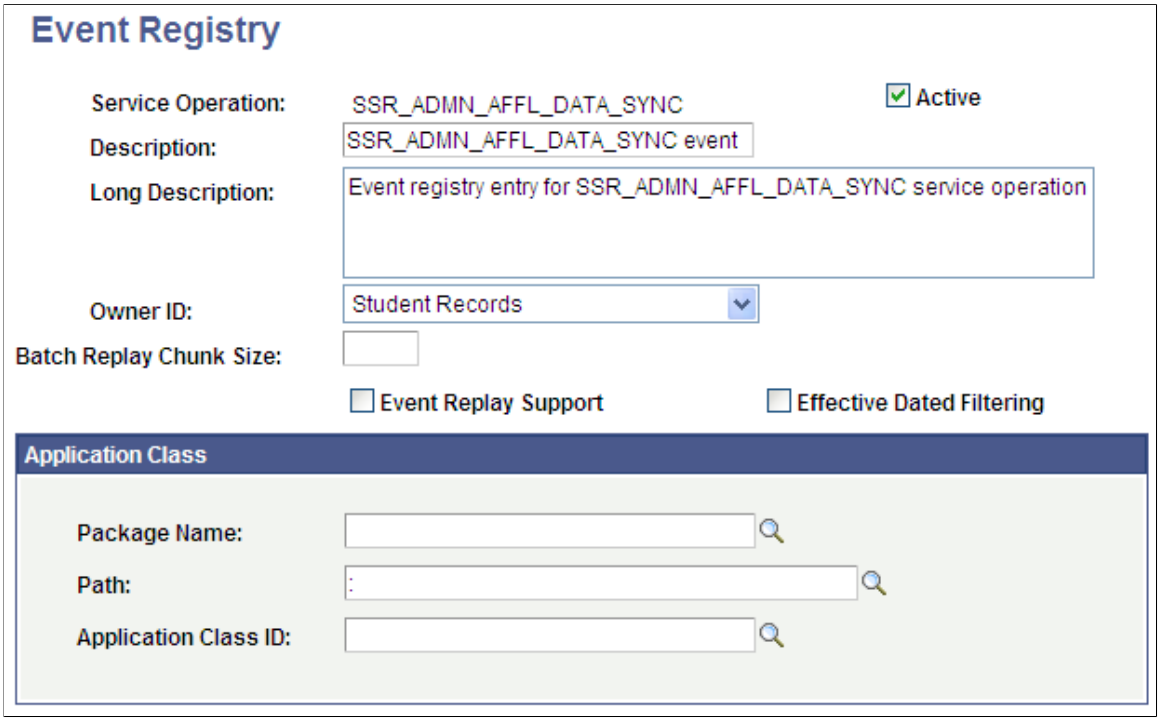
Setup SACR, System Administration, Integrations, Event Register

Image: Event Registry page

An event is registered in Campus Solutions SOA Framework to support integration with the Affiliation framework. Verify that following entry is available in your database and is Active.



See "Understanding Constituent Web Services *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

See " Outbound and Inbound Services *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

See "Configuring Constituent Event Triggers *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

See "Configuring Notification Handlers *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

See "Defining Affiliations *(PeopleSoft Campus Community 9.0 Fundamentals PeopleBook)*"

See "Setting Up Enrollment and Course Batch Processing *(PeopleSoft Campus Solutions 9.0: Student Administration Integration Pack)*"

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