STUDENT ADMINISTRATION

TRAINING GUIDE

STUDENT ADMINISTRATION BASICS

(CAMPUS COMMUNITY)

PEOPLESOFT

TABLE OF CONTENTS

Student Administration Basics *(Campus Community)*

The Student Administration Basics reference guide is an introduction to PeopleSoft Student Administration system. This guide also provides an overview of the functionality available in the PeopleSoft Campus Community module.

The Campus Community module is used to maintain records for individuals that comprise the University of Calgary community. Following the initial creation of these records, Campus Community is used to update, maintain, and track information about these individuals.

The Student Administration Basics reference guide is comprised of the following components:

1) **Effective Dating**
   Effective Dating discusses how PeopleSoft uses Effective Dating to capture historical, current and future information. An understanding of Effective Dating is critical to understanding data within the system.

2) **Search/Match**
   The Search/Match component is used to determine whether a person or organization already exists in the database. Search/Match is the tool that can assist in associating the student with their correct emplid (identification number).

3) **Create/Maintain Biographical (Student) Data**
   Create Maintain Biographical Data demonstrates the processes for creating and maintaining personal information for a student.

4) **Create/Maintain Identification (Student) Data**
   Create/Maintain Identification Data discusses how student identification information such as Citizenship, Visa/Permit and Residency data is created and maintained in PeopleSoft.

5) **Create/Maintain External Organization Data**
   Organization data for high schools, colleges or universities, community or civic groups and so on can be recorded in PeopleSoft. This section discusses how to create organization records, enter school related data and enter affiliations.

6) **3C's**
   Communications, Checklists and Comments are used to track and analyze correspondence, list requirements and enter notes for or about students. 3C's discusses the process for creating and reviewing Communications, Checklists and Comments.

7) **Service Indicators**
   Service Indicators can be holds to prevent a student from receiving certain services or alerts to staff to indicate special services be provided. This segment demonstrates how Service Indicators can be assigned or removed, and how to view Service Indicator data.

8) Student Services Centre

The Student Services Centre provides staff with a similar view that students have of their PeopleSoft Student Centre and provides information about a student's' record in one place.

9) Student Services Centre – View As

The View As component enables you to view the Student Centre as an undergraduate, graduate, alumni or applicant student and also use View As simulating viewing on a mobile device. As the Student Centre interface has a different look when launched by the student, this function allows you to see the screen as it presents to the student. The Student Centre is where students access information about their student record.

10) Queries

A set of custom Queries are available through the web-based Query Manager/Query Viewer component. These queries can be run real time as required by authorized personnel. This component explains how to search for, run queries and download the results into HTML format or an Excel file.

11) How To Get Help

This portion details the process for getting assistance when experiencing difficulties.

Understanding Effective Dating

Historical, current and future information is captured within the Student Administration System by the use of effective dated rows. An effective date field acts like a date/time stamp, showing when the data for a specific row is effective.

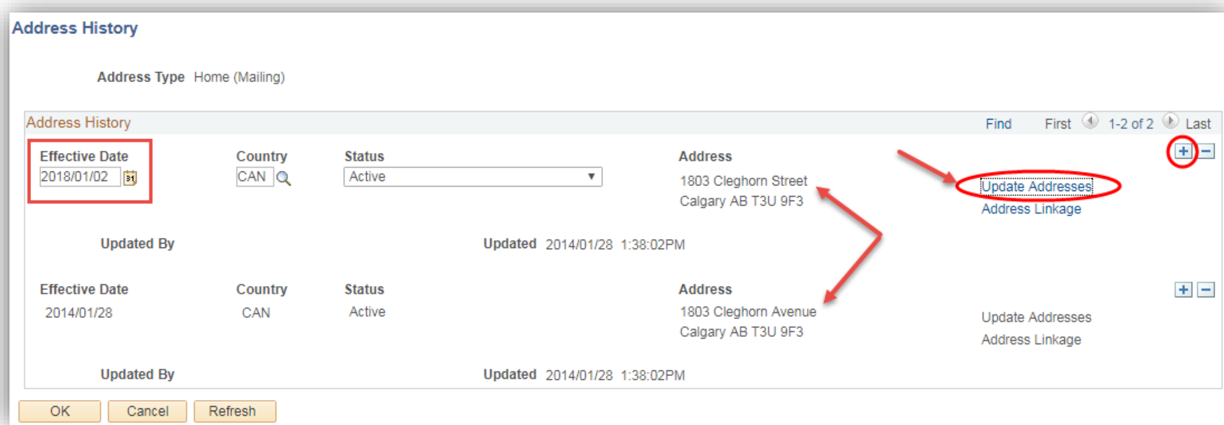
To understand effective dates you should become familiar with how these different date categories are used.

System Date	The current date.
Current Date	The data row with the date closest to—but not greater than—the current (system) date. Only one row can be the current row.
History Date	Data rows that have effective dates or sequences earlier than the current data row. There can be more than one row.
Future Date	Data rows that have effective dates later than the system date. There can be more than one row.

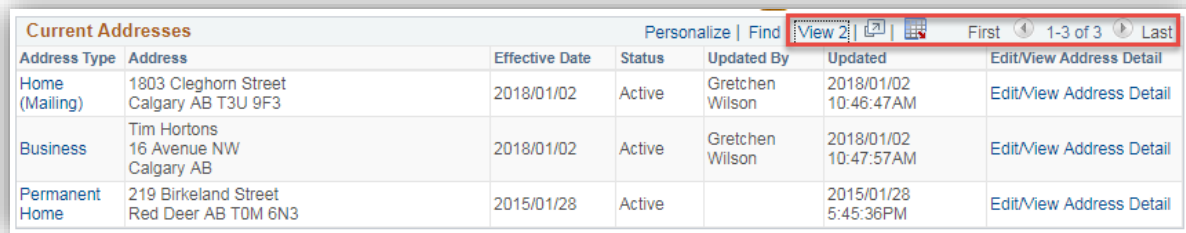
You can make changes to data (e.g. name, address, phone, email) at any time prior to the date they become effective. For example, if you have a change which is effective in the future, you can enter the new information any time prior to the effective date and the system will automatically use those changes on the effective date entered.

When making changes to the current row (when the date is less than the system date) you must insert a new row. When you insert a new row, the system copies the existing information into the new row and the System Date appears in the Effective Date field.

You can also update data and enter the date you want the change to go into effect or accept the System Date. The Effective Date must be greater than or equal to the System Date.



You can view historical, current and future data.



Current Addresses — Personalize | Find | View 2 | First 1-3 of 3 Last

Address Type	Address	Effective Date	Status	Updated By	Updated	Edit/View Address Detail
Home (Mailing)	1803 Cleghorn Street Calgary AB T3U 9F3	2018/01/02	Active	Gretchen Wilson	2018/01/02 10:46:47AM	Edit/View Address Detail
Business	Tim Hortons 16 Avenue NW Calgary AB	2018/01/02	Active	Gretchen Wilson	2018/01/02 10:47:57AM	Edit/View Address Detail
Permanent Home	219 Birkeland Street Red Deer AB T0M 6N3	2015/01/28	Active		2015/01/28 5:45:36PM	Edit/View Address Detail

View All — Displays all rows of data on a page and allows you view historical data by scrolling horizontally. You can also use the **Next** or **Previous** row buttons to view the next of previous row.

First — Takes you to the first row of data

Last — Takes you to the last row of data

Displays the previous row of data

Displays the next row of data

An understanding of Effective Dating is critical to understanding data within the system.

Search/Match Name

Search/Match is the tool that can assist in associating the student with their correct emplid (identification number). Search/Match is particularly useful for any staff who:

• Add/Update a Person
• Create/Update a Prospective Student
• Use Application Entry

The search/match function can be performed from a number of modules within the Student Administration System; for example Campus Community, Student Admissions and Student Recruiting.

The following components present an overview of the Search/Match process:

1) Search/Match
This component demonstrates the Search/Match process for a person and how to view additional information for this individual.

2) Organization Search/Match
The Search/Match process for an Organization is similar to the Person Search/Match.

Search/Match

Search Match can be initiated through any of the following navigation:

Campus Community > Person Information (Student) > Search/Match
Student Admissions > Application Entry > Search/Match
Student Recruiting > Maintain Prospects > Search/Match

The Search/Match component uses a combination of Search Type and Search Parameter to search the database for a person or organization.

There are two types of searches which can be performed:

a) Basic Search
   This search is based on predefined rules. You must know specific information about the individual to perform this search.

or

Ad Hoc Search
   This search is a custom search based on user input in one or more pre-defined fields. (*For example the Ad Hoc search is solely based on* <u>*user input data and not predefined rules.)*</u>

Navigation:

The Search/Match component can be accessed through the various navigation paths or Breadcrumbs listed below.

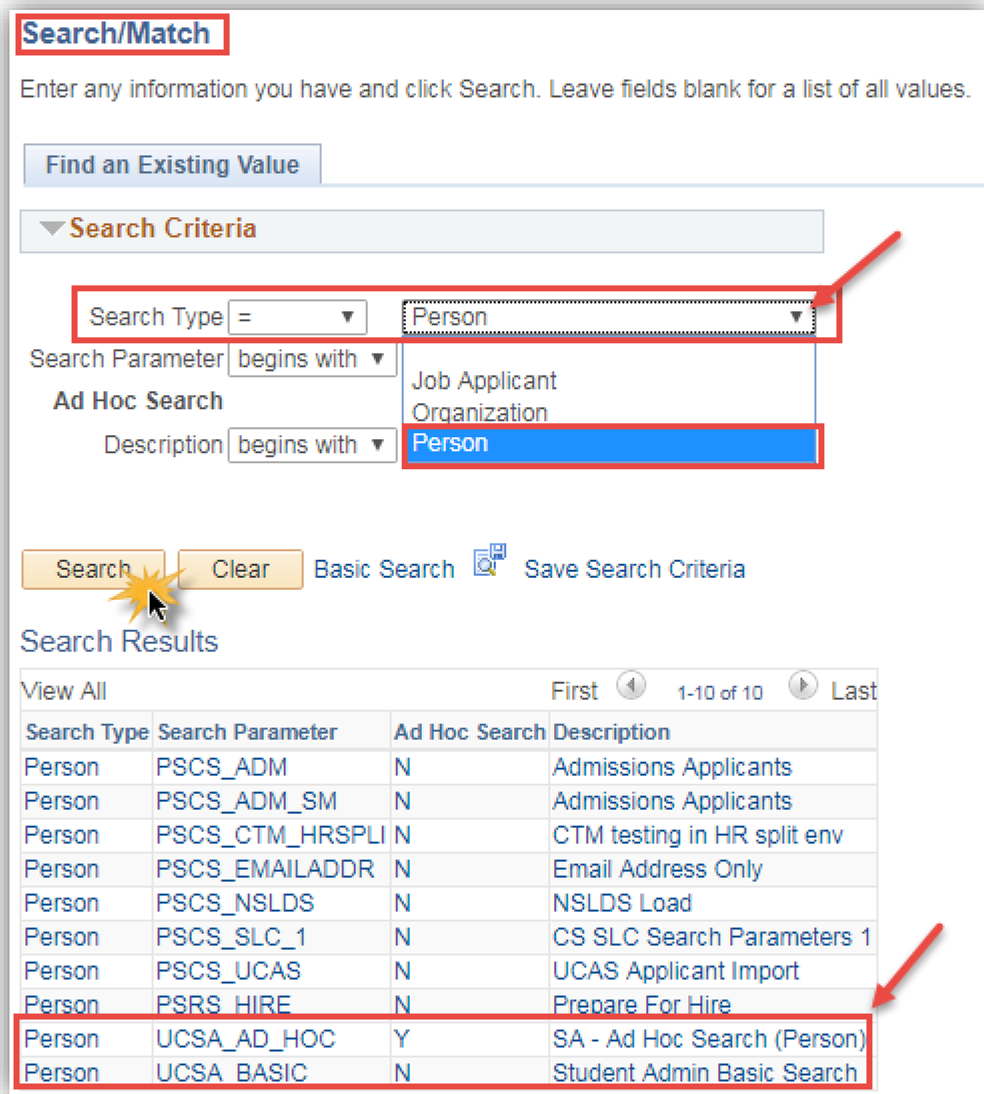
► Breadcrumbs
Campus Community >Personal Information (Student) >Search Match

► Breadcrumbs
Student Admissions >Application Entry >Search Match

► Breadcrumbs
Student Recruiting >Maintain Prospects >Search Match

Search/Match – Find an Existing Value

This page is used to determine the Search Type and Search Parameter combination.



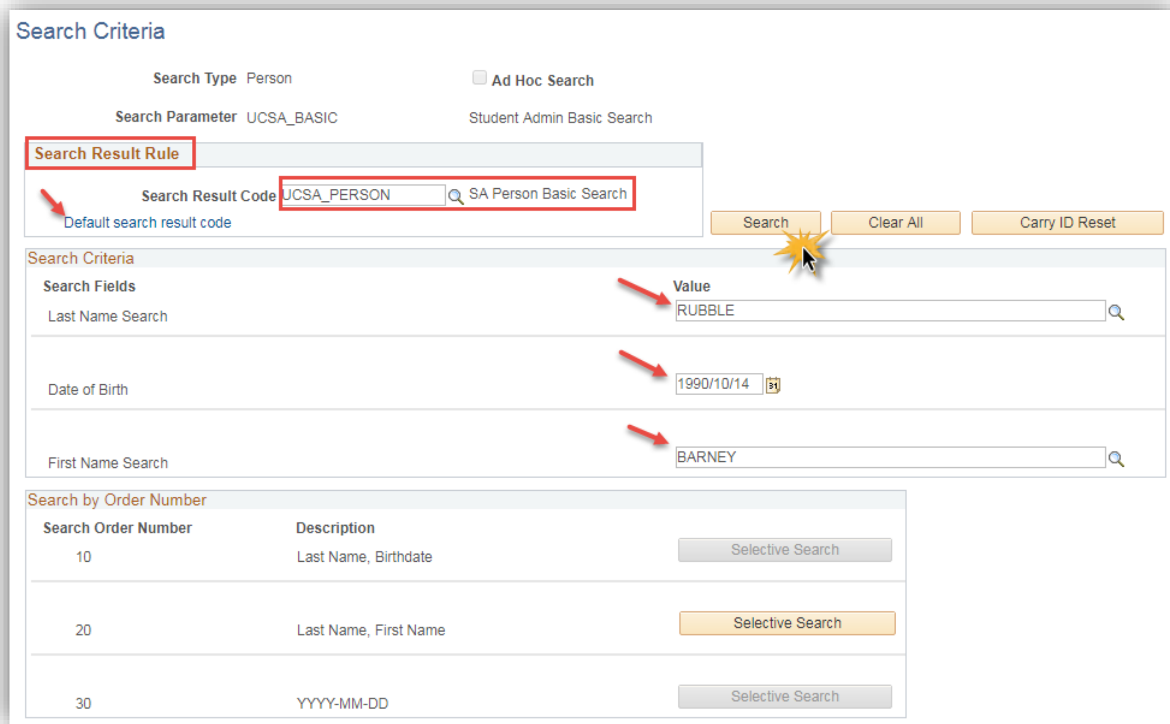
✧ ***Notes:***

►Use the Search button to display the associated parameters for the Search Type selected and then select the desired parameter.

Student Admin Person Basic Search

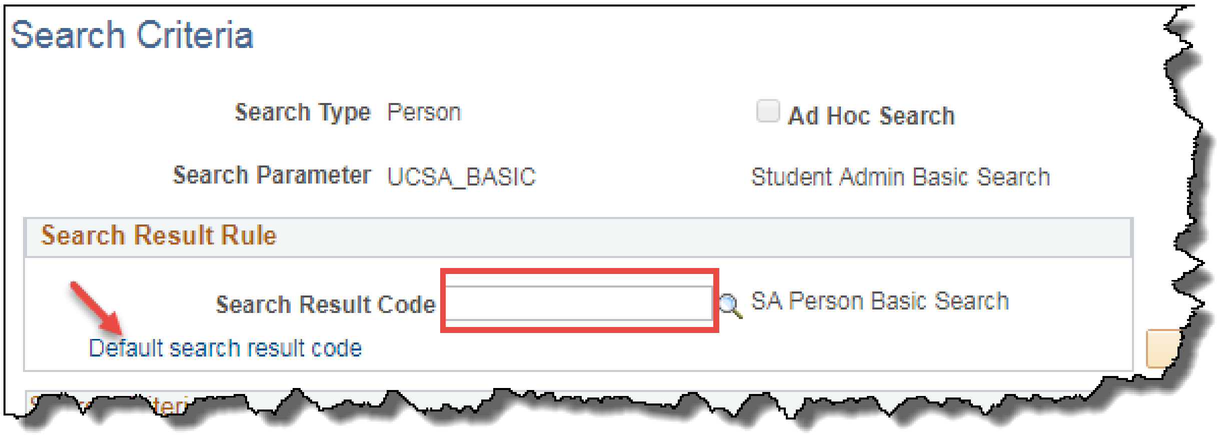
Search Criteria

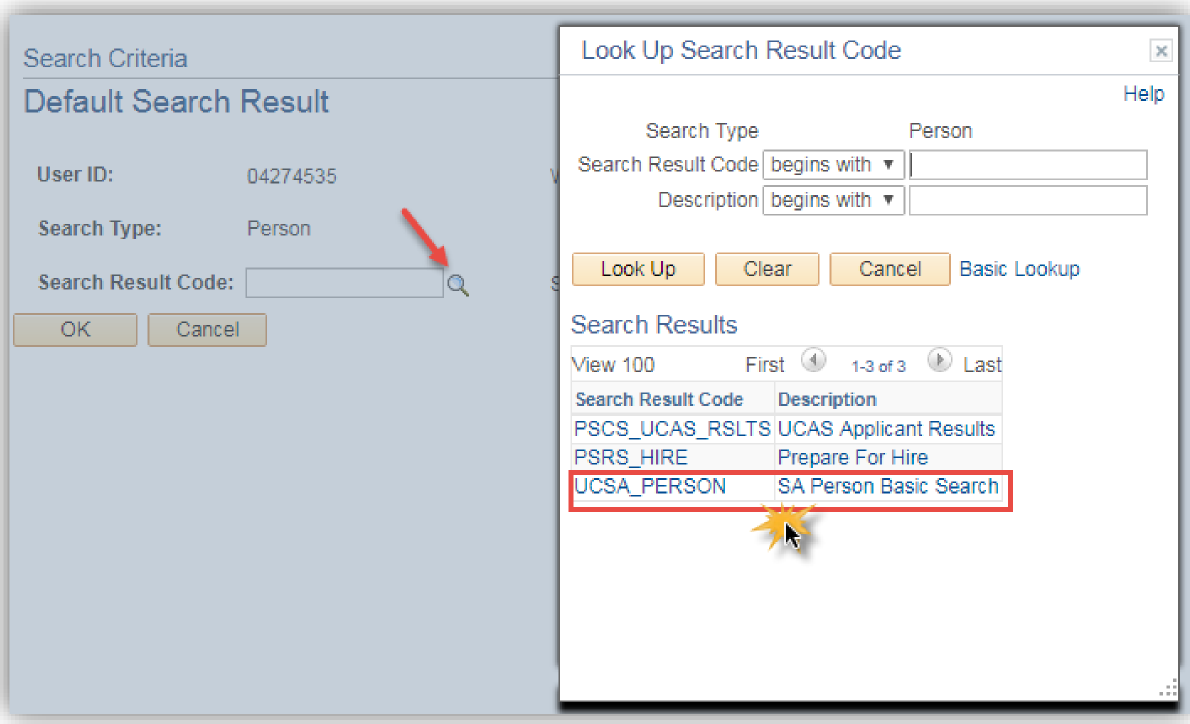
The Search Criteria page displays search criteria fields based on the Search Type and Search Parameter selected or the "Saved Search" specified. The Search Order Number is also displayed. The Search Order Number is the defined set of rules associated with the search criteria fields.



Search Result Rule

This section of the page is used to determine the how the search results will be displayed. By default the Search Result Code field is empty. This default must be entered to begin a search.





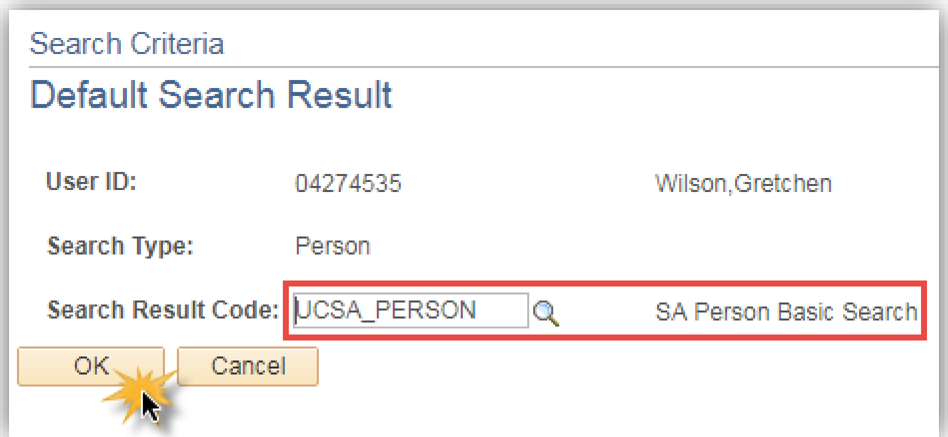
✧ ***Notes:***

►**Search Result Code**
The Search Result Code is a "required" field. The Search Result Code contains all of the information regarding how to display the IDs retrieved by Search/Match and what data is returned.

►The Search Result Code Look Up button is used to display the list of available codes to select from.

Default Search Result

Within the Search Result Rule section the User Default link is used to access the page which allows you to default the Search Result Code if the same code is frequently used.



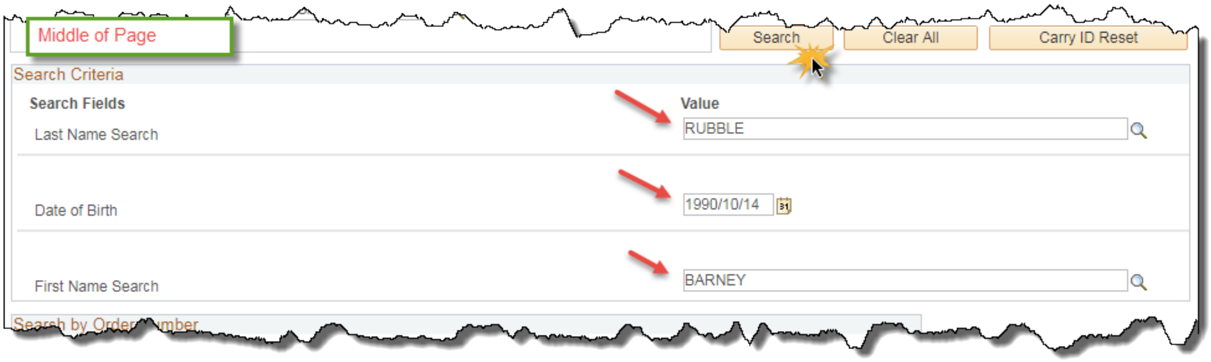
✧ ***Notes:***

►**Search Result Code**
The Look Up button is used to display the list of available codes which may be defaulted.

►The defaulted code will automatically display in future searches.

Search Criteria

Entering minimal information in the Search Criteria value fields results in a longer list of potential matches to be reviewed. For example, you can perform the search entering the individual's full last name and full first name only. However, entering additional data such as the birth date to further define the search minimizes the search results returned.

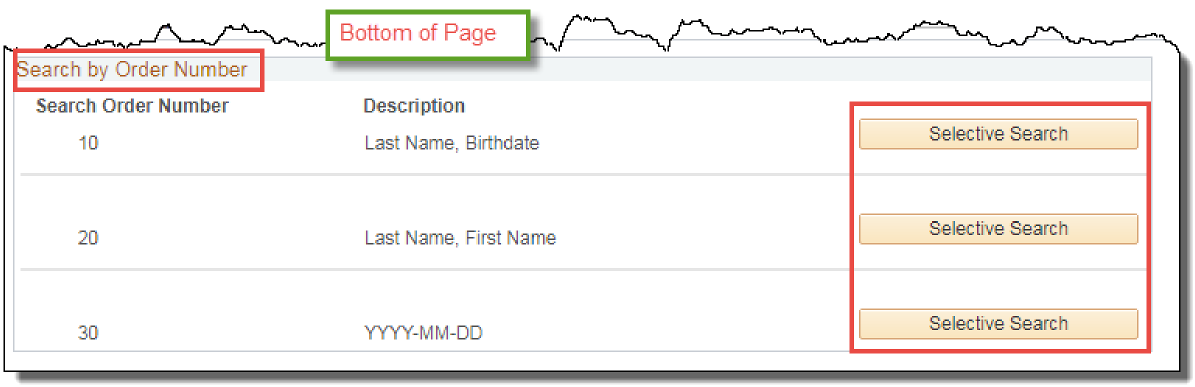


✧ ***Notes:***

►Search Fields
A Student Admin Basic Search can be done using the Search Fields Last Name (*the* <u>*full*</u> *last name must be entered*), Date of Birth and First Name (*the* <u>*full*</u> *first name must be entered*).

►Enter the value and press the Enter key *or* use the tab key to navigate to the next field.

Search by Order Number



✧ ***Notes:***

►Search Order Number
The Search Order Numbers display only if the Ad Hoc Search box is <u>not</u> checked on the Search/Match component.

When you enter criteria in the value fields, the Selective Search button displays for the Search Order defined with the fields. In the example shown, values were entered in the Last Name, Date of Birth and First Name fields. The Selective Search buttons allow you to perform a specific search for combinations of Last Name, Birth date; Last Name, First Name or Birth date only.

►**Search**
This is the recommended search process.

The Search button displays only when the appropriate values have been entered and is used to search for only those values specified.

The Search button is used to launch a search on all of the values entered. The Search Results returned are based on the most restrictive search order number defined in the Search Parameter selected.

For example, if Search/Match finds at least one potential matching ID at Search Order Number 10 (Last Name, Birth date), it will stop the search and display the results obtained at Search Order Number 10. If no potential matching IDs are found, the search continues to the next Search Order Number 20 (Last Name, First Name) and so on.

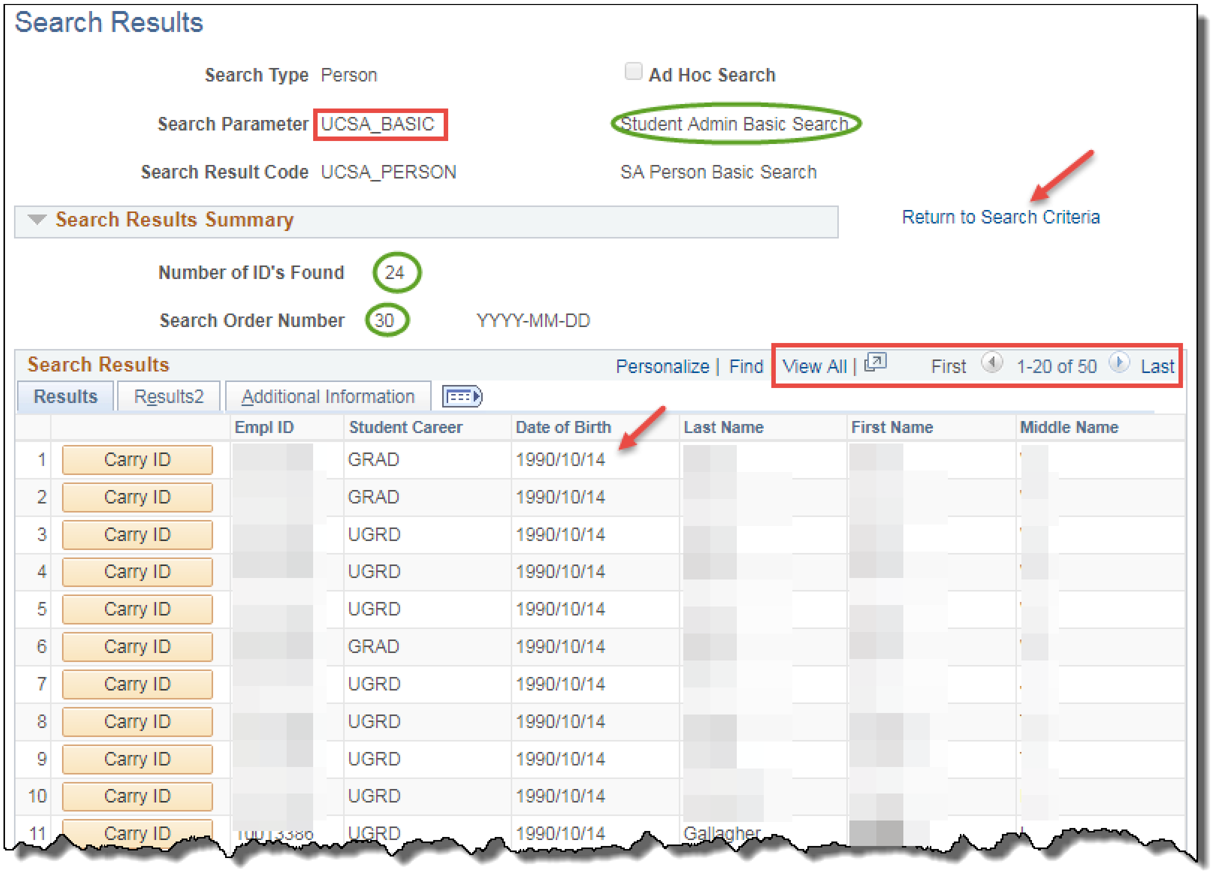
►**Selective Search**
This is an alternative way to perform the search.

The Selective Search button is used to perform the specified search related to the Search Order Number. For example, to search by Birth date only, use the Selective Search button for Search Order 30.

When the search is complete, the Search/Match search results display.

Search Results

The Search Results page is used to view the list of results returned by the search.



Search Results Summary

✧ ***Notes:***

►Search Order Number

Indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs.

►Return to Search Criteria

The Return to Search Criteria link returns you to the Search Criteria page.

Results

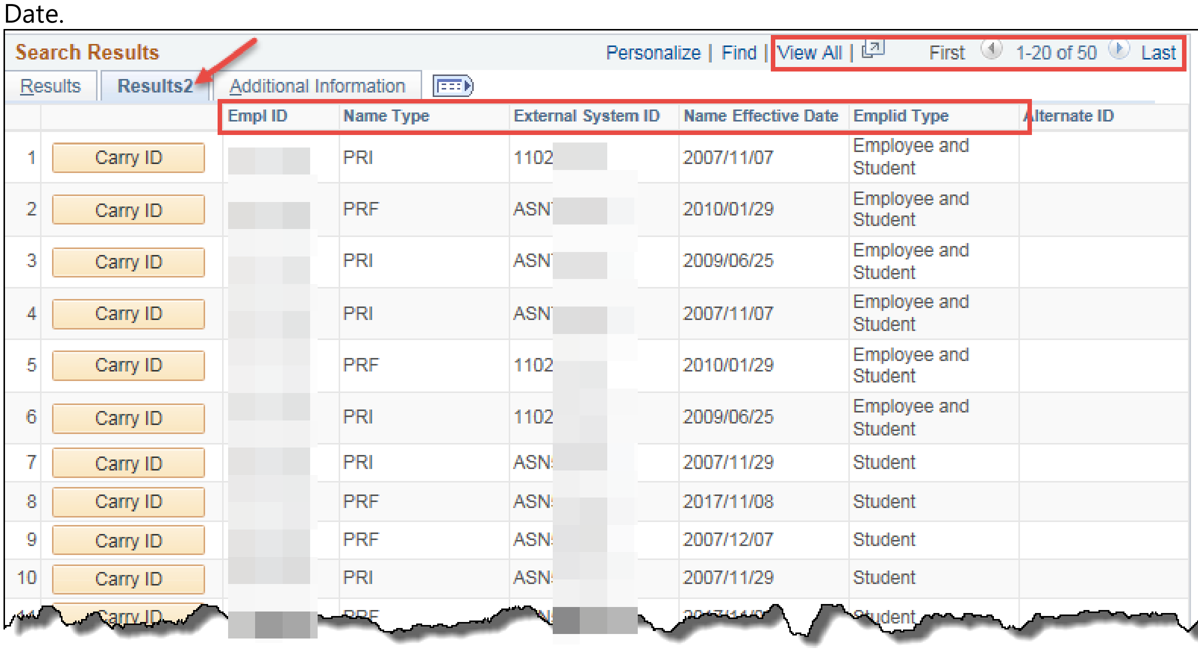
The Search Results page displays the Employee ID, Student Career, Date of Birth, Name Type, Last and First Names on the Results page.

✧ ***Notes:***

►**Student Career**
This field is populated when an individual has both a Human Resources EmplID and a Student EmplID. Select the record where the Student Career is not blank.

Results 2

The Results2 page is used to display the persons Employee ID, External System ID and Name Effective Date.



Search Results | Personalize | Find | View All | First 1-20 of 50 Last

Results | Results2 | Additional Information

		Empl ID	Name Type	External System ID	Name Effective Date	Emplid Type	Alternate ID
1	Carry ID		PRI	1102	2007/11/07	Employee and Student	
2	Carry ID		PRF	ASN	2010/01/29	Employee and Student	
3	Carry ID		PRI	ASN	2009/06/25	Employee and Student	
4	Carry ID		PRI	ASN	2007/11/07	Employee and Student	
5	Carry ID		PRF	1102	2010/01/29	Employee and Student	
6	Carry ID		PRI	1102	2009/06/25	Employee and Student	
7	Carry ID		PRI	ASN	2007/11/29	Student	
8	Carry ID		PRF	ASN	2017/11/08	Student	
9	Carry ID		PRF	ASN	2007/12/07	Student	
10	Carry ID		PRI	ASN	2007/11/29	Student	
	Carry ID		PRF			Student	

✧ ***Notes:***

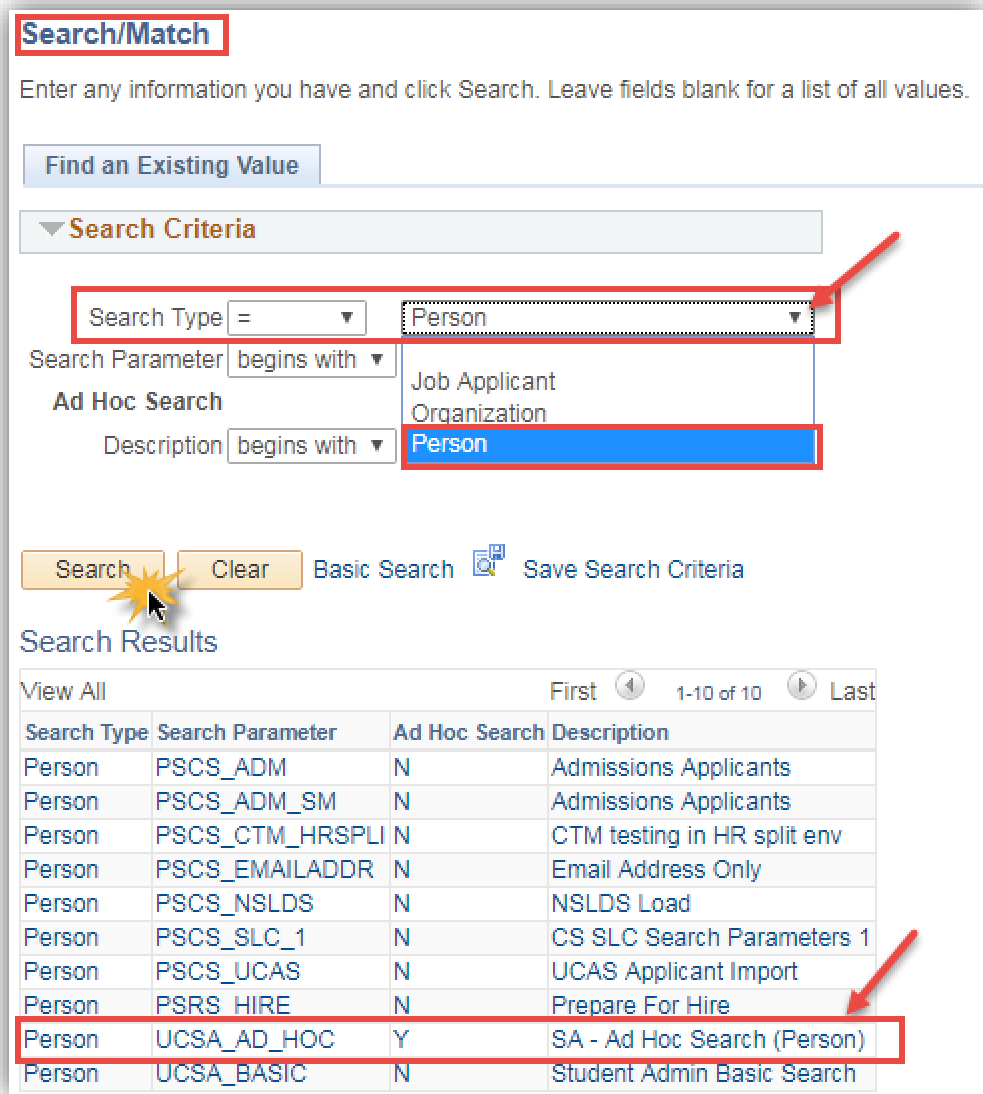
►**External System ID**
The External System ID field will display the Alberta Student Number and the Ontario University Applications Centre (OUAC) number if available.

Additional Information

The Additional Information page displays the Person Organization Summary and Relations With Institution details which are not used by the U of C.

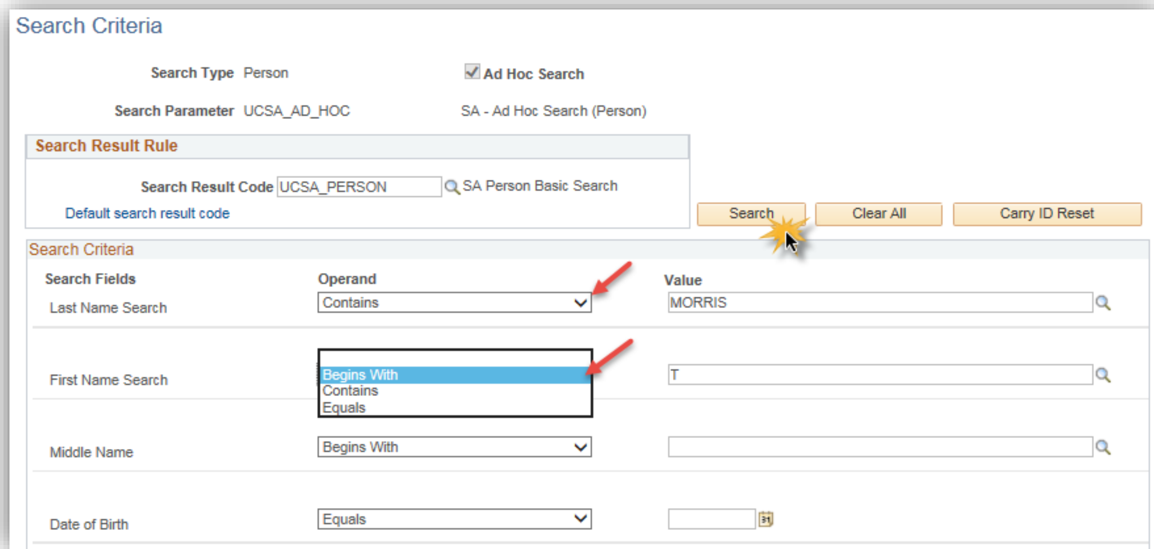
Student Admin Ad Hoc Search

The Ad Hoc Search checkbox on the Search/Match – Find an Existing Value component is used to display the list of Ad Hoc Searches.   The Organization Ad Hoc Search will be explained later in this document.



Search Criteria

To perform the Ad Hoc Person Search minimal data is required in at least one field on the Ad Hoc Search/Match page. For example, just the first letter of the surname can be entered to perform this search. Remember, the search results are based on the data entered. The more defined the search is, the shorter the list of results.



✧ *Notes:*

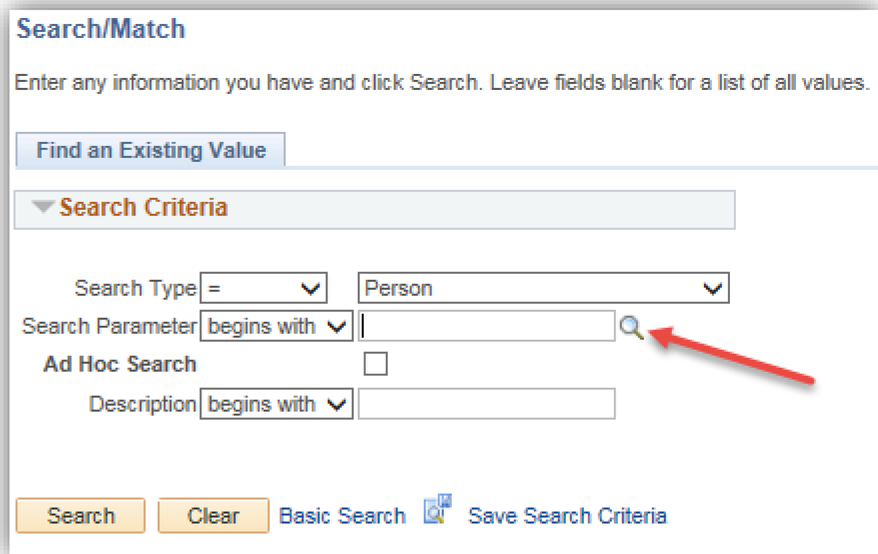
►Operand

The Operand field enables you to perform a search that “begins with”, “contains”, or “equals” the search value that you enter.

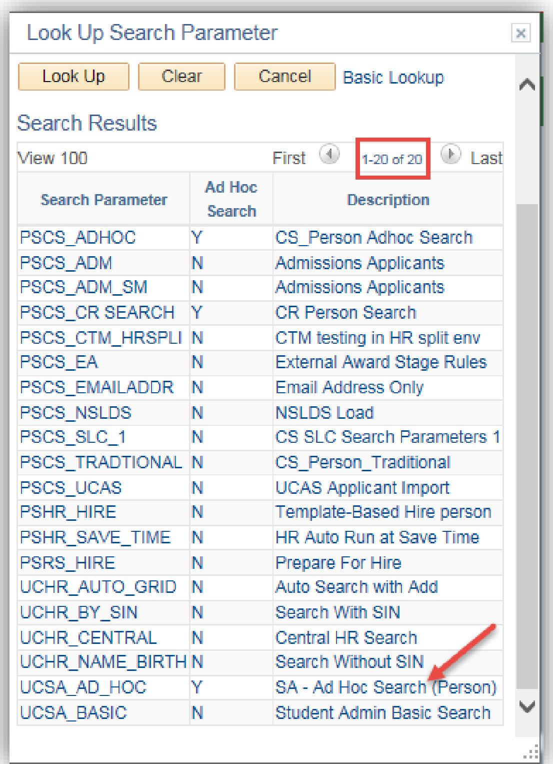
Save Search Criteria (Saving the Search)

The Search/Match process can be streamlined by “saving” both the Basic and Ad Hoc Searches.

When “saving the Search”, the Search Parameter is selected from the Search Parameter Look Up list.



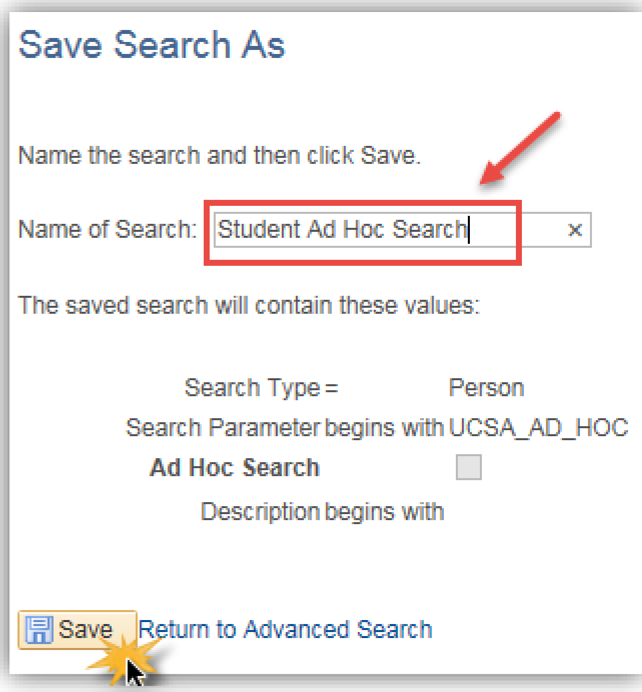
The Look Up Tool will appear, select the appropriate Search Parameter (eg. SA – Ad Hoc Search (Person).



After selecting the appropriate Lookup Parameter save the search.

Save Search Criteria

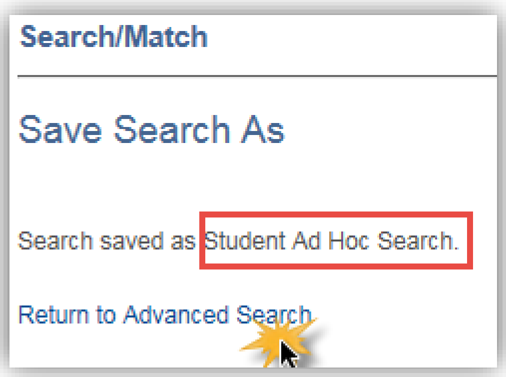
The Save Search Criteria link is used to access the Save Search As page.



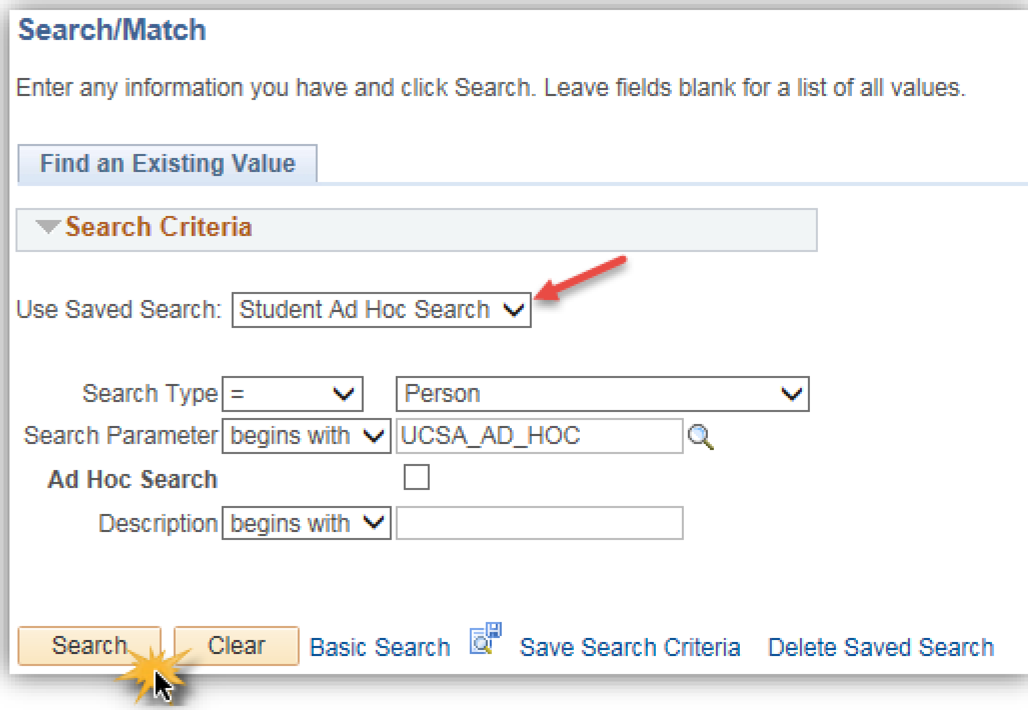
✧ ***Notes:***

►The **Name of Search** field is used to 'name' the search.

►The **Save** button is used to 'save' the search and a confirmation will appear.



►Once the search is 'saved' the **Use Saved Search** field displays on the Search Match page.



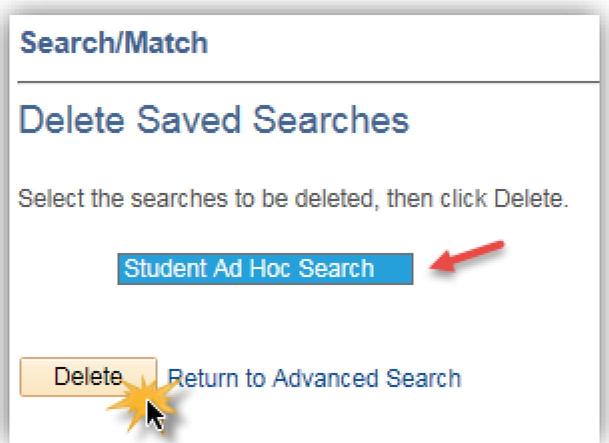
✧ ***Notes:***

►The desired search is then selected from the **Use Saved Search** drop down list.

Delete Saved Searches

The Delete Saved Search link is used to access the Search/Match page to delete a saved search when no longer required. Press the Delete Saved Search:

Delete Saved Search



✧ ***Notes:***

►The **Delete** button is used to delete the desired saved search.

Organization Search/Match

Prior to adding a new external organization to the database, it is ***imperative*** the Search/Match process be used to check to see if the organization already exists to prevent the creation of a duplicate external organization. *Note: Depending on your access/permissions you may or may not be able to add a new organization.*

The Search/Match process is similar to the person search. Both Basic Search and Ad Hoc Search functionality is available to search for an organization.

Navigation:

► Breadcrumbs
Campus Community >Personal Information (Student) >Search Match

► Breadcrumbs
Student Admissions >Application Entry >Search Match

► Breadcrumbs
Student Recruiting >Maintain Prospects >Search Match

Create/Maintain Bio Demo Data

Student biographical data which includes name, address, gender, date of birth is recorded on various pages in the Student Administration Campus Community module. Create/Maintain Bio Demo data reviews the process for creating and maintaining this data.

The following components detail how to create and maintain a student's biographical information.

1) **Add/Update A Person**
   When a student is added to the system a personal information record is created. This section discusses how to create a biographical record for a student and demonstrates how to maintain the biographical data for a student. **Note:** *Depending on your access/permissions you may or may not be able to create a person information record.*

2) **Edit/Update A Name**
   The Name component is used to enter and maintain different name types for an individual. With effective dating, you can also maintain and review the history of name changes for each type.

3) **Edit/Update An Address**
   The Address component is used to enter and maintain different address types for an individual. For example, you might want to enter an individual's home, business, and permanent address. You can update these addresses as needed and maintain the address change history.

4) **Edit/Update Phone Information**
   The Phone component details how to enter and maintain a student's phone information.

5) **Edit/Update Electronic Address**
   Electronic Addresses component details how to enter and review electronic addresses. Active students will have an email address based on their first and last name followed by @ucalgary.ca eg. firstname.lastname@ucalgary.ca Please avoid changing this information.

6) **Emergency Contacts**
   This component demonstrates how to enter the names, addresses, and telephone numbers of people to contact when an individual has an emergency situation.

7) **Postal Email Address Extract**
   This custom process is used to extract postal or email addresses for groups of students that can be used to generate letters, address labels or emails using Word merge.

Add/Update a Person

If the Search/Match Process does not find a record for the individual you are searching for, the individual can be added to the system. To add an individual to the system, you must create a personal information record for that individual. *Note: Depending on your access/permissions you may or may not be able to add/update a person.*

Important Note: ***Search/Match must <u>always</u> be performed when adding an EMPLID (creating a person information record). Search Match can be achieved through any of the following navigation:***

Campus Community > Person Information (Student) > Search/Match
Student Admissions > Application Entry > Search/Match
Student Recruiting > Maintain Prospects > Search/Match

Navigation:

► Breadcrumbs
Campus Community > Personal Information >Add/Update a Person

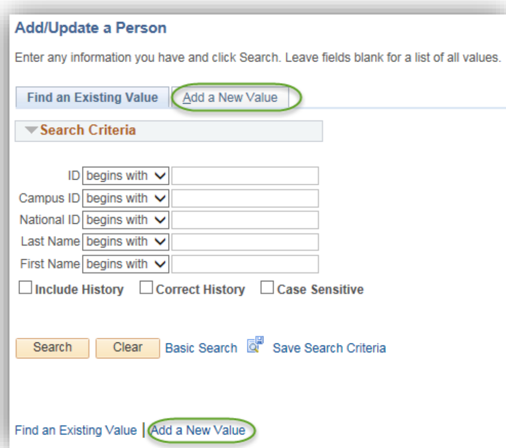
Other staff authorized to make changes to Bio/Demo data will not have "add" access but will be able to *update* this information using the *Add/Update a Person component* under the "*Personal Information (Student)*" menu

Navigation:

► Breadcrumbs
Campus Community > Personal Information (Student) >Add/Update a Person

Add/Update a Person

To create a personal information record for an individual not found in the system, a New Value must be added. This page is used to "Add a New Value".

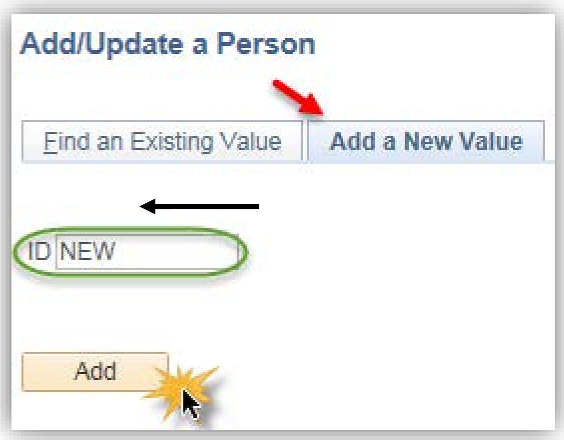


✧ ***Notes:***

► Either the Add a New Value tab at the top of the page or the Add a New Value link at the bottom of the Add/Update a Person search page can be used to display the Add a New Value page.

Add a New Value

A New Value must be added in order to record the Biographical Details and create the personal information record.

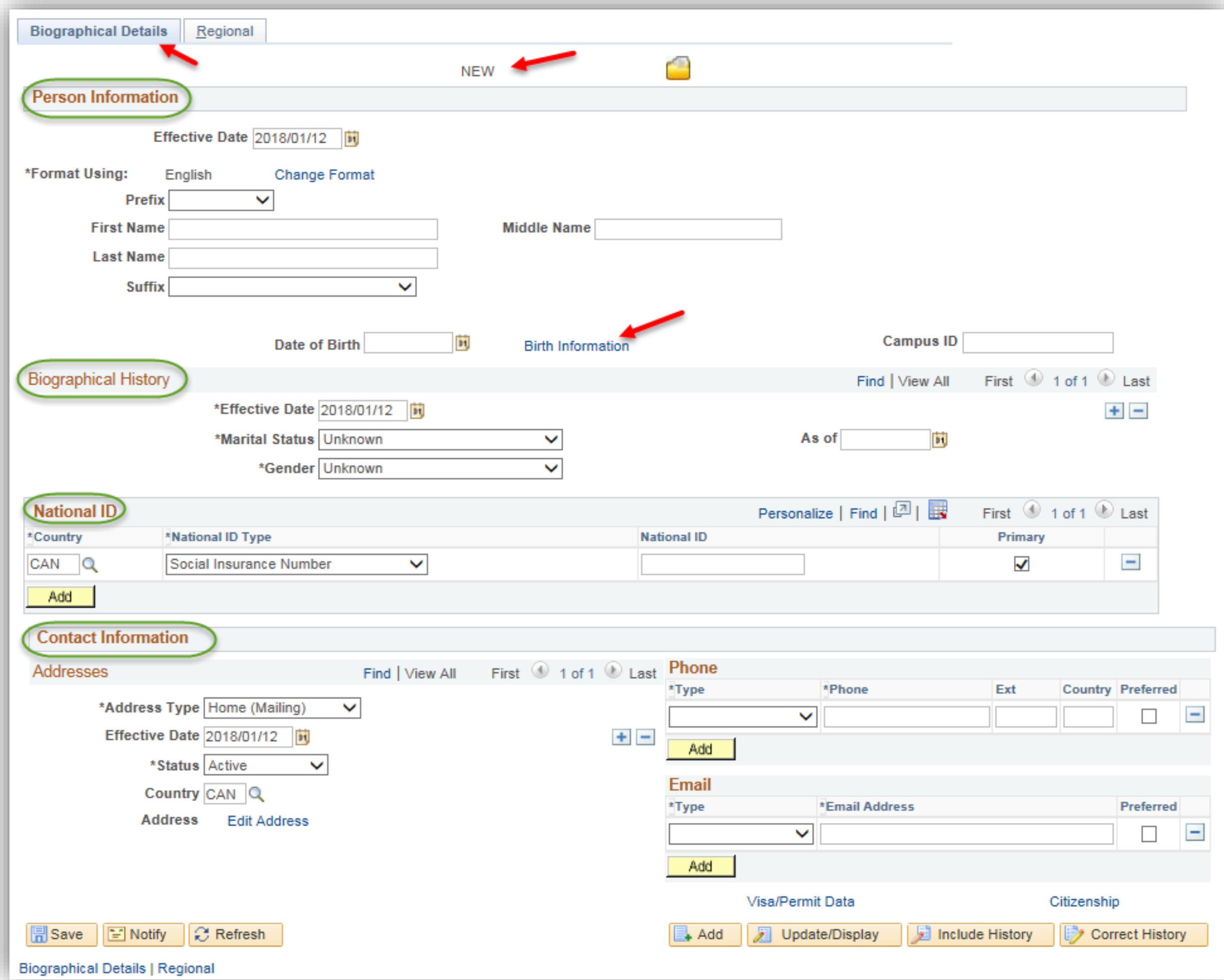


✧ ***Notes:***

►The Add a New Value page displays with the word "New" in the ID field. The system will automatically assign a new EmplID when the component is saved. **Important Note:** *The ID should always display "NEW". Modifications to the content of the ID field should **never** be made when "Adding a New Value".*

Biographical Details

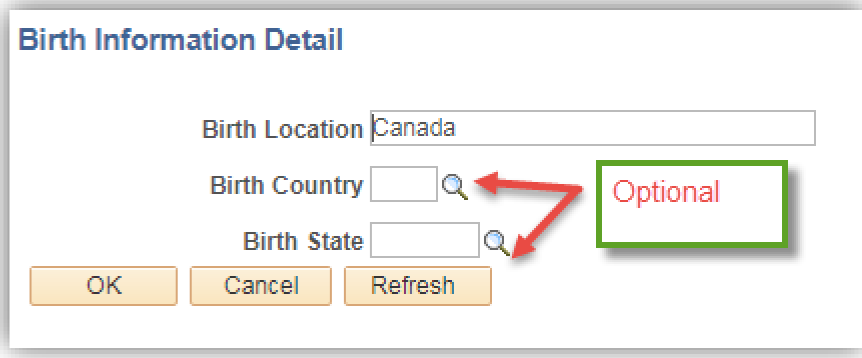
To create a personal information record, the student biographical data is entered on the Biographical Details page.



✧ ***Notes:***

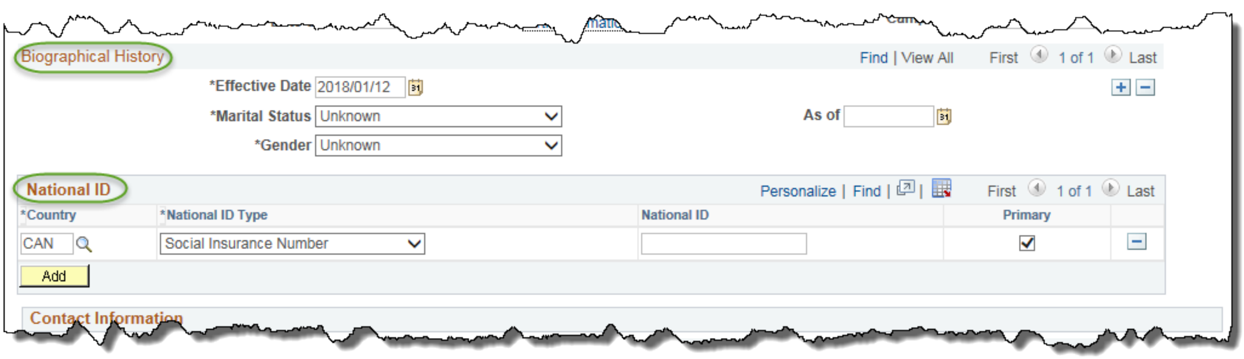
►Birth Information link

The Birth Information link is used to access the Birth Information Detail page, on which you can enter the individual's birth location, country, and state. This information is optional.



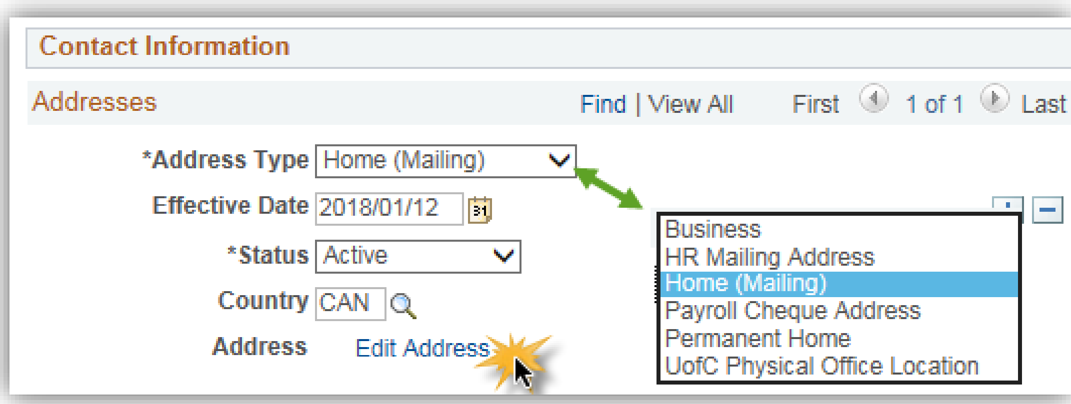
Biographical History/National ID

This portion of the Biographical Details page is used to record the Biographical History and National ID/Social Insurance Number (if known).



Contact Information – Addresses

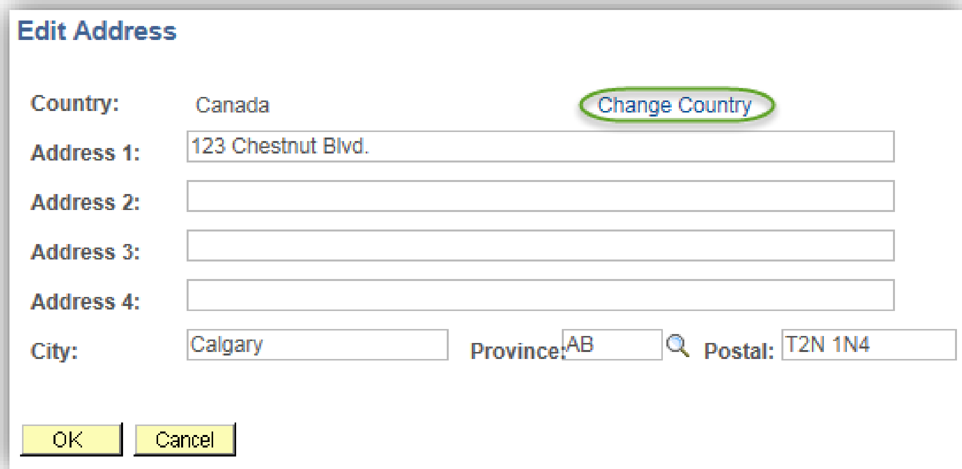
This section of the Biographical Details page is used to record the individuals address details.



✧ ***Notes:***

►**Edit Address**
The Edit Address link accesses the Edit Address page, on which you can enter address data for the address type selected.

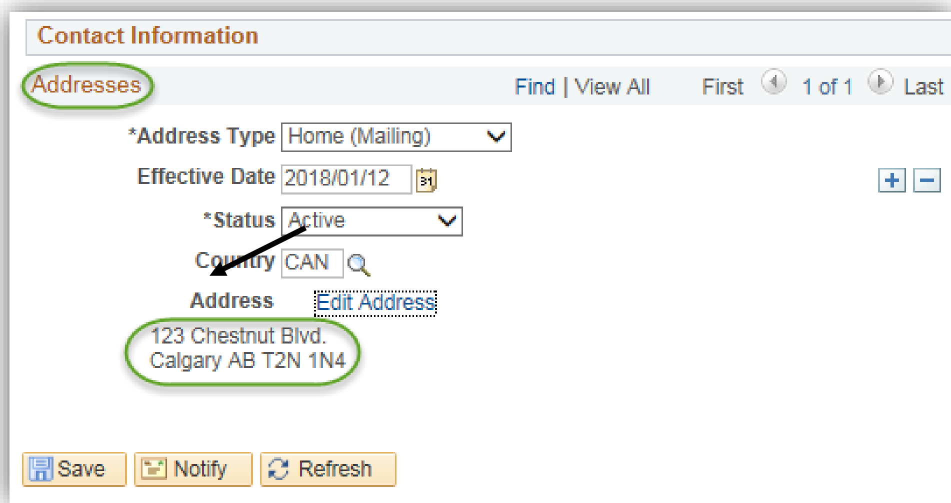
Edit Address



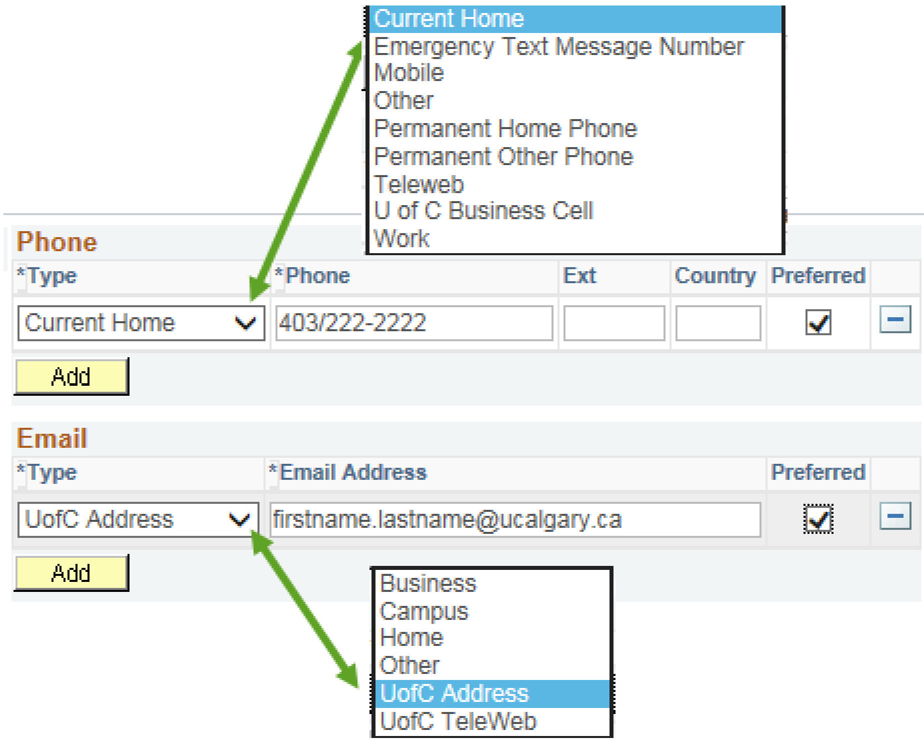
✧ ***Notes:***

►**Change Country**
This link can be used to change the Country. When the country is changed, the Address format changes according to the country selected.

►The OK button commits the data entered. This information appears when you return to the Biographical Details page.



Contact Information – Phone/Email



✧ ***Notes:***

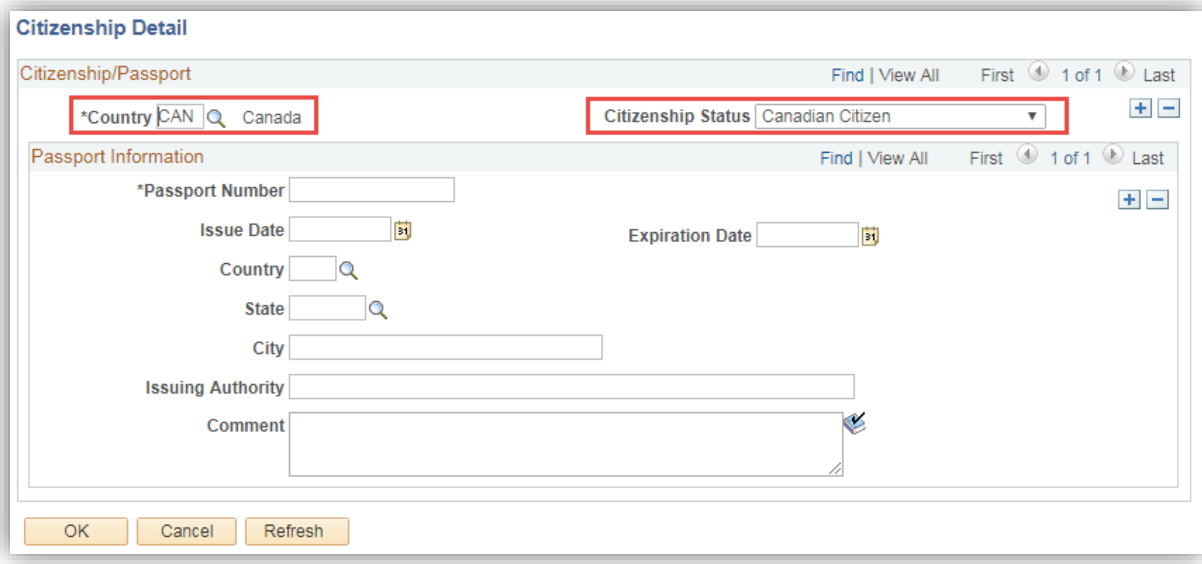
►Phone
The "Home" phone type is preferred. However, multiple phone numbers can be entered. Use the drop down list to display and select a phone type for the student.

►The phone information may be entered without formatting, Area Code first and then the subsequent digits. The system will automatically format the number as shown in the example above.
Important Note: *This applies only to domestic phone numbers which have 7 or 10 digits (when the area code is included). International phone numbers have a length greater than the standard and should be formatted at the time of data entry.*

►Emergency Text Message Number
An Emergency Text Message Number may also be recorded for emergency notifications from U of C authorities. Students have the capability to add this information in their Student Center as well.

►Email
Each student will have an email address based on their first and last name followed by @ucalgary.ca eg. firstname.lastname@ucalgary.ca Please avoid changing this information.

Citizenship Detail



✧ ***Notes:***

►The Citizenship link on the Biographical Details page is used to access the Citizenship Detail page, on which you can enter the individual's citizenship data. If the country of citizenship is not Canada, then the Visa Permit Type must also be recorded.

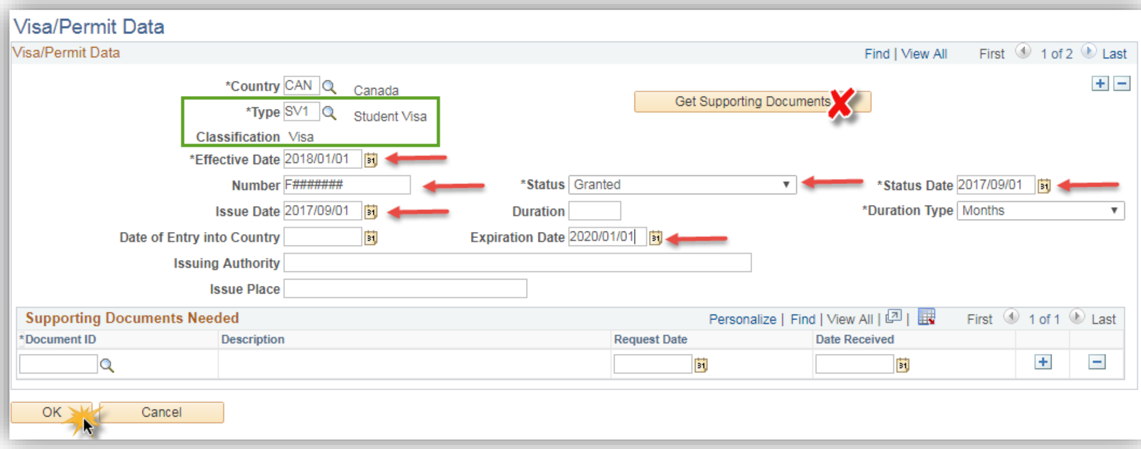
►**Citizenship Status**
The Citizenship Status is recorded <u>only</u> for Canadian Citizens. If the country of citizenship is not Canada, the Citizenship Status field is left blank.

►**Passport Number**
Passport information is not currently collected by the U of C.

Visa/Permit Data Detail

Visa/Permit Data is used to record the students Visa/Permit information when the individual is not a Canadian Citizen.

The following displays the fields required to update the Visa Study Permit information on a student's record. This information is required in order to hire and pay a student and also for record keeping.



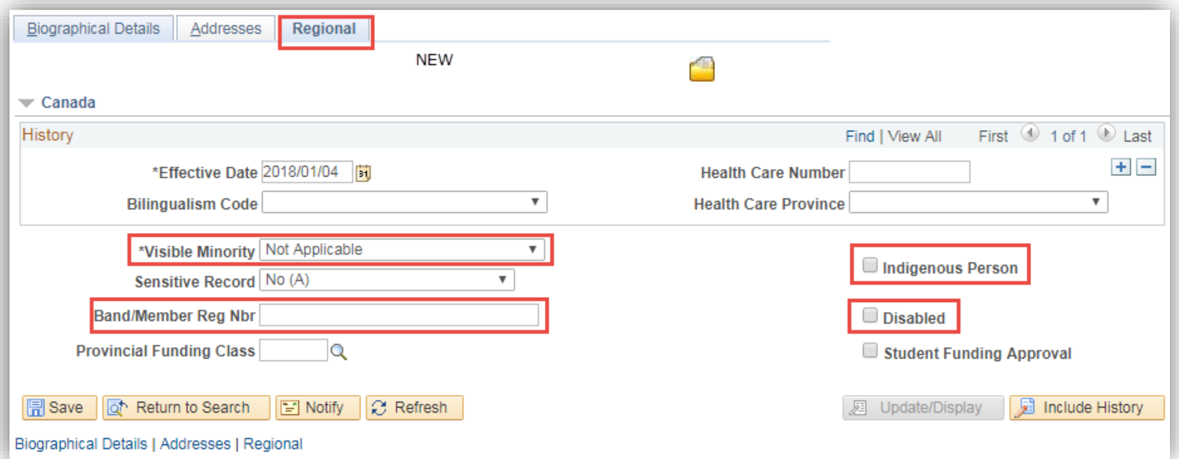
✧ ***Notes:***

►Visa/Permit link
The Visa/Permit link accesses the Visa/Permit Data page, on which the student's visa and permit data is entered.

►Get Supporting Documents
This is not used by the U of C. Supporting documents are processed as Checklist items. ***(see Checklist Management)***.

Regional

This page records the regional specific information for a student.



✧ ***Notes:***

►Visible Minority

This field is used to record the indigenous person (*where applicable*) as specified by the applicant. The values applicable to Student Administration are: Inuit, Métis, Non-Status Indian/First Nation and Status Indian/First Nation. Please note that the indigenous person status is not considered a visible minority, this is the only location that the indigenous person status data could be captured in the system.
(*The additional values listed are for HR use only.*)

►Indigenous Person

This checkbox is selected when a student has indicated they are a Canadian indigenous person.

►Band/Member Reg Nbr

If the person has indicated they are Indigenous, the Band/Member Reg Nbr field is used to record the persons Band/Member registration number when provided.

►Disabled

This checkbox is selected when a student has indicated that they have a disability.

Update a Person

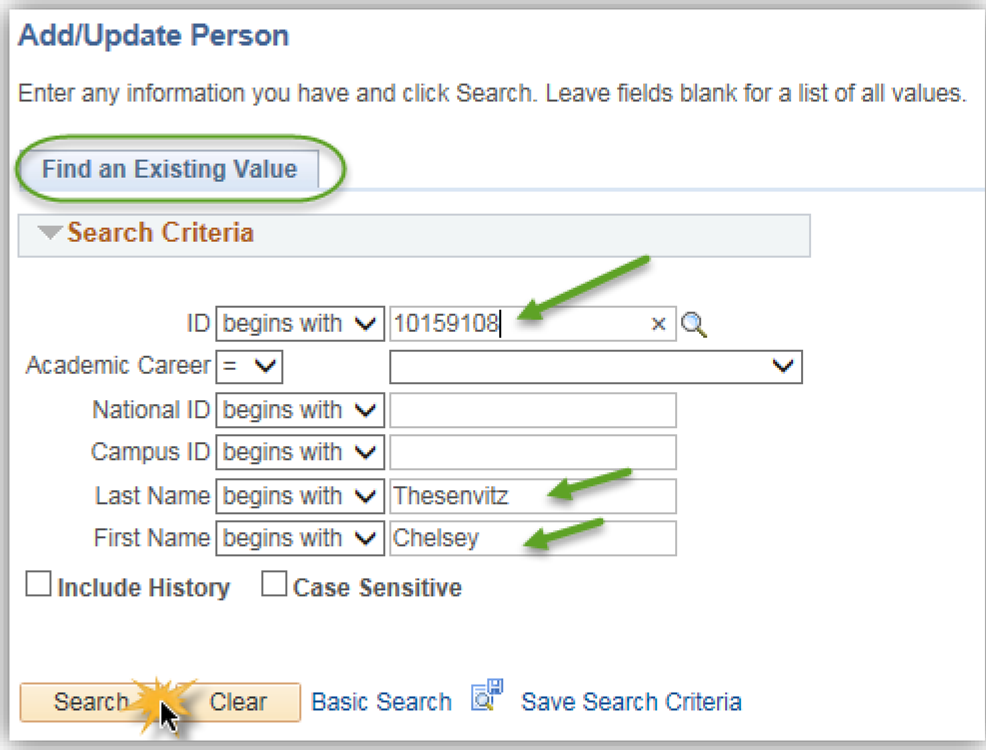
To edit or update information, return to the Biographical Details or access specific pages to edit or update information.

Navigation:

► Breadcrumbs
Campus Community > Personal Information (Student) > Add/Update a Person

Add/Update a Person

The Add/Update Person search page is used to find an existing record.



✧ ***Notes:***

►Enter the ID, Last Name or First Name on this page can be used to find an existing value.

Names

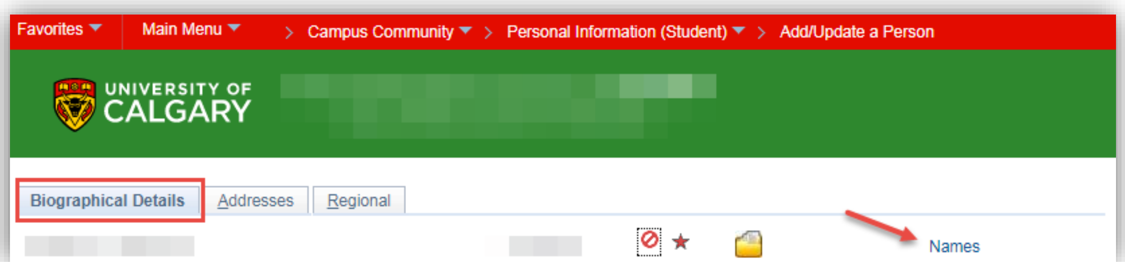
You can enter and maintain different name types for an individual. Effective dating allows you to maintain and review the history of name changes for each type.

The individuals name information can be edited or updated from either the Names link on the Biographical Details page or by going directly to the Name page.

Important Note: Name changes are processed only by Enrolment Services when appropriate documentation is received. Depending on the circumstances for the name change, the following documentation is required:

- Birth certificate (to correct names that may have been incorrectly reported by a student - happens fairly frequently, but not exclusively with foreign names)
- Marriage certificate
- Provincial Legal Name Change document
- Passport/Immigration documents

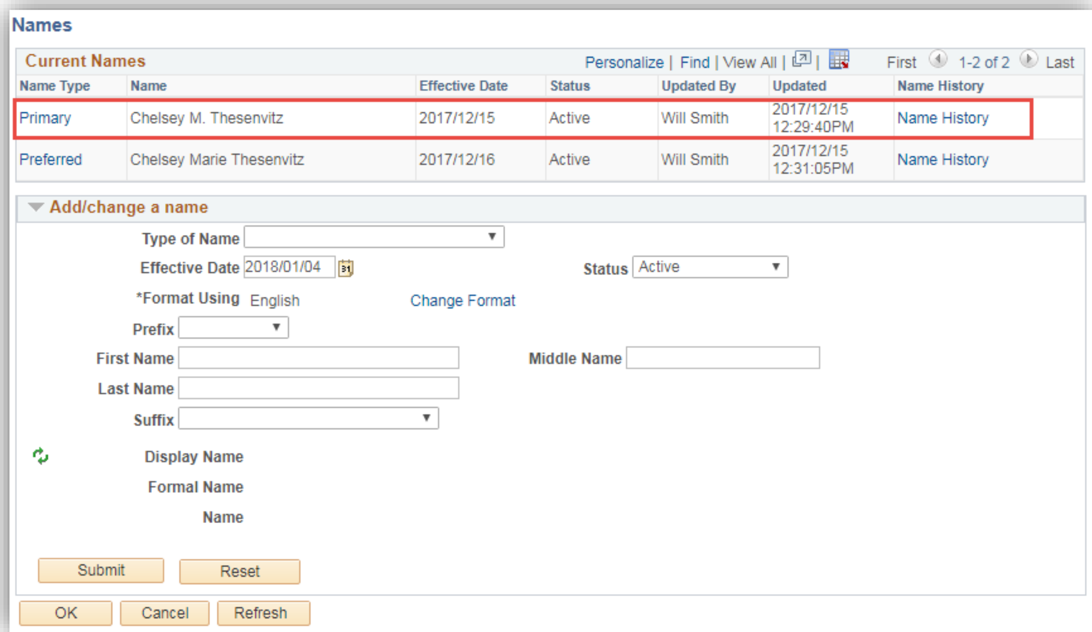
Documentation is not required when a person is changing back to their maiden name if a record of the maiden name already exists in the system already.



Or

Navigation:

► Breadcrumbs
Campus Community >Personal Information (Student) >Biographical (Student) > Names



Important: Name Changes and Convocation

Do NOT create a separate **DEGREE** name row for a student. If a **DEGREE** name row exists for a student you will need to update both their **PRIMARY and DEGREE** name rows in order for the Name Change to be reflected on their degree.

✧ ***Notes:***

►**Submit**

Submitting the data changes the data in the Current Names area so the changes can be viewed and clears all fields in the Add/change a name area. Names must first be submitted before they can be saved.

►**Reset**

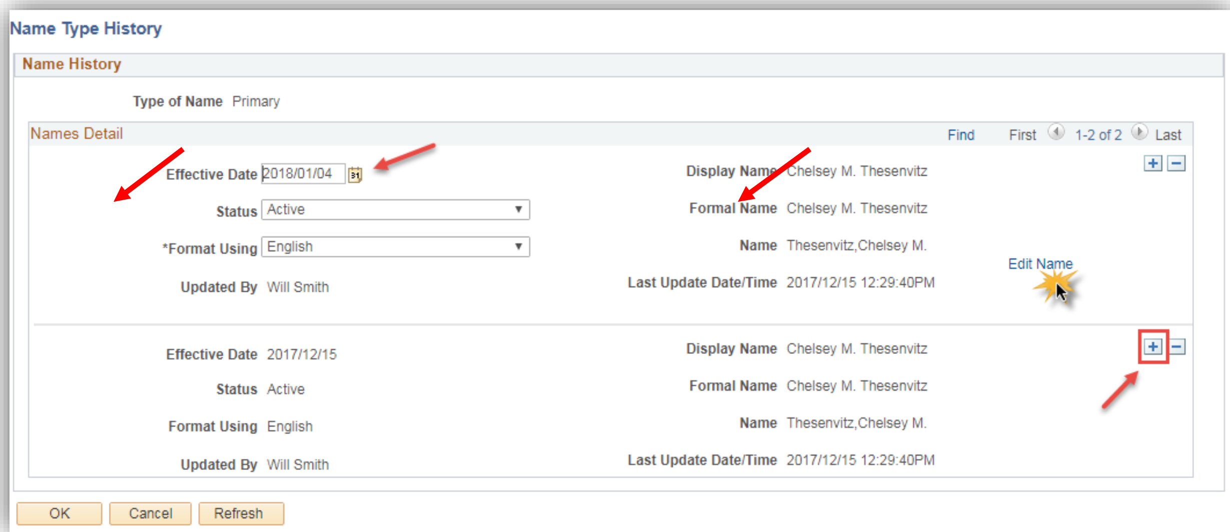
The Reset button is used to clear all fields in the Add/Change a Name window which enables a value to be re-entered if necessary.

►**Name History**

The Name History link is used to access the Name Type History page. This page allows the name history to be viewed or the current name type updated.

Name Type History

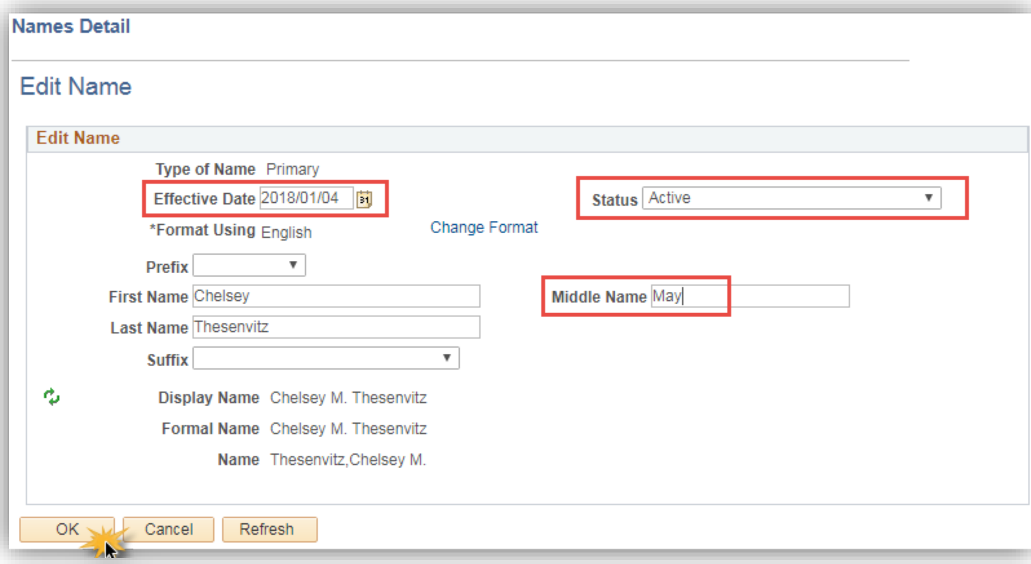
This page allows you to view the Name Type History as well as update, status and name information.



✧ ***Notes:***

►The Edit Name link accesses the Edit Name page on which you can edit the name information.

Edit Name



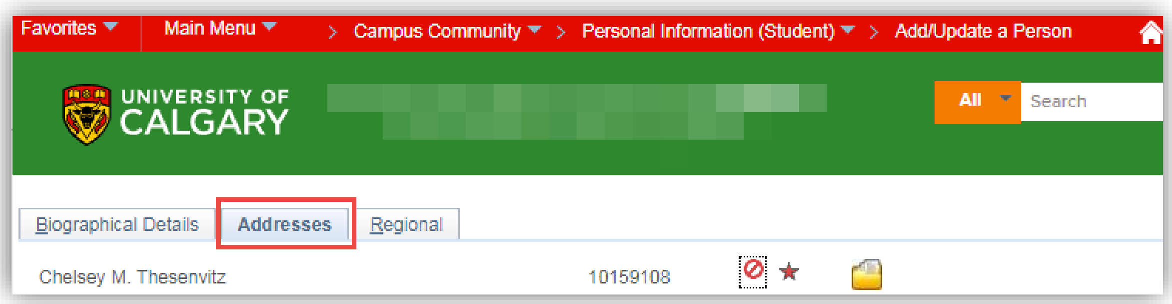
✧ ***Notes:***

►Changes must be submitted and saved for the system to retain the updated name information.

Addresses

You can also enter and maintain different address types for an individual. For example, you might want to enter an individual's Home (Mailing), Permanent Home or Business address. You can update these addresses as needed and maintain the address change history.

The individuals address information can be edited or updated from both the Biographical Details (via Add/Update a Person) or by going directly to the Address page. The Address component can also be used to correct address information immediately when entered incorrectly.



Or

Navigation:

► Breadcrumbs
Campus Community >Personal Information (Student) > Biographical (Student) > Addresses/Phones >Addresses

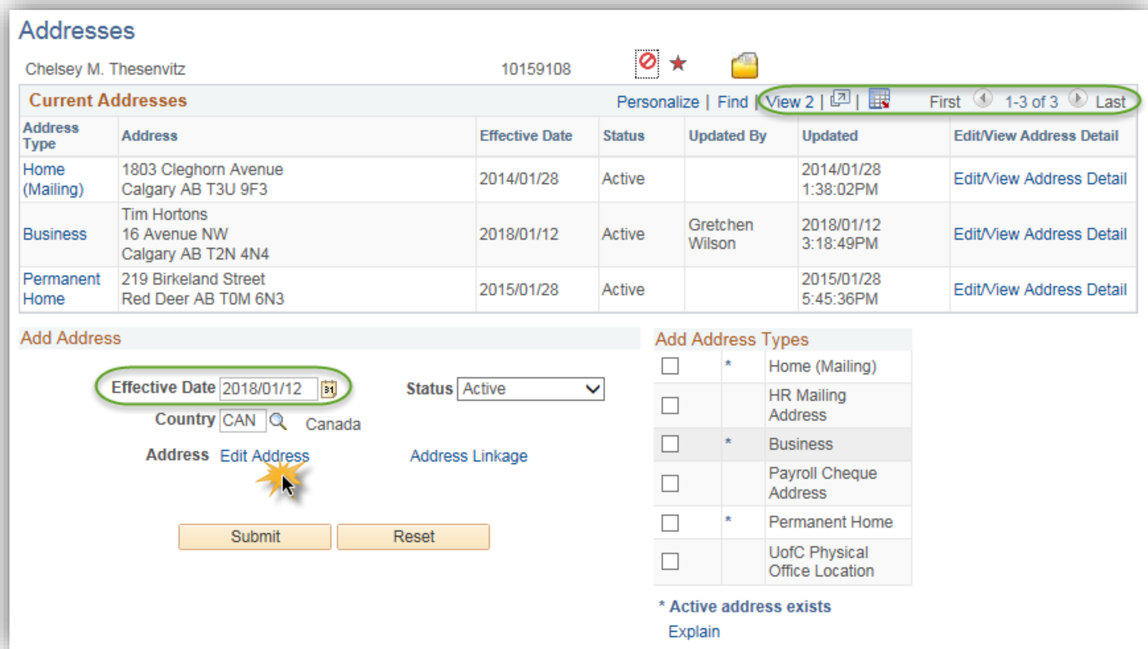
Addresses

The Address page allows you to correct address information entered incorrectly, add additional addresses, copy or update the individuals existing address information.

Information that you enter here is the same as the address data that you enter on the Biographical Details page when you create a personal record. When you save the data (on either page), the system displays the updated address data in both places.

Add an Address Type

If the individual does not have a current address, the text *No current addresses exist* appears instead.

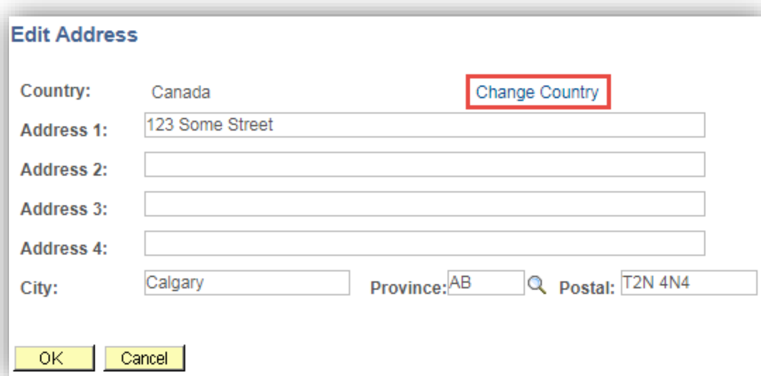


✧ ***Notes:***

►Country
The Country code can also be changed on the Edit Address page.

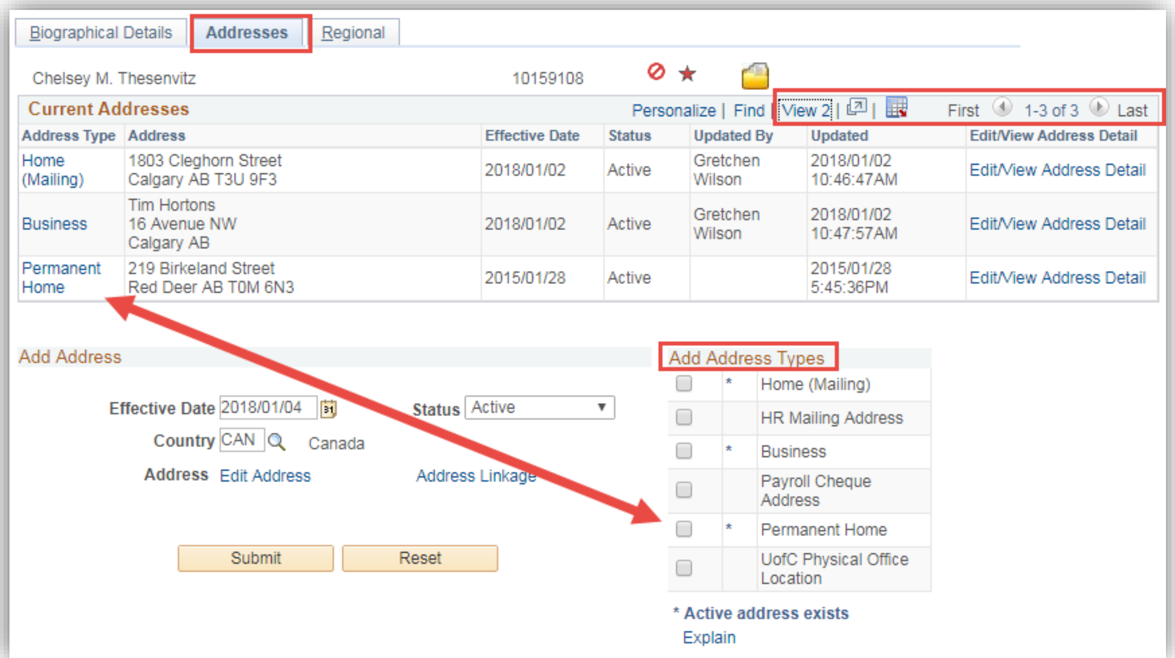
►Edit Address
The Edit Address link is used to access the Edit Address page, on which you can enter new address data.

Edit Address



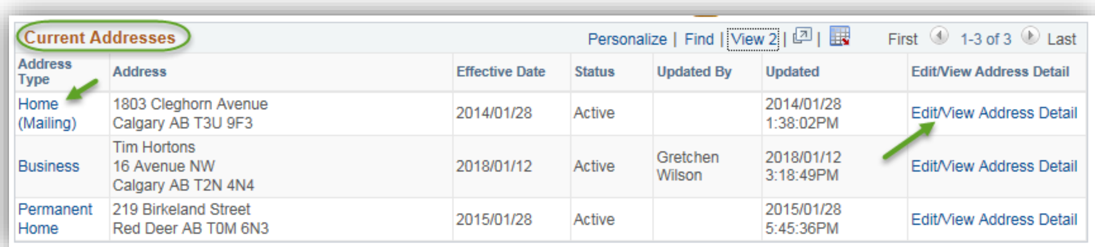
►Add Address Types

The Bio Demo record may contain multiple addresses for an individual i.e. Home (Mailing), Permanent Home and Business. This section is used to select the appropriate Address Type to add to the record.



Update an Address

The Current Addresses portion of the page displays the Address Type, Address, Effective Date, Status and the Edit/View Address Detail link.

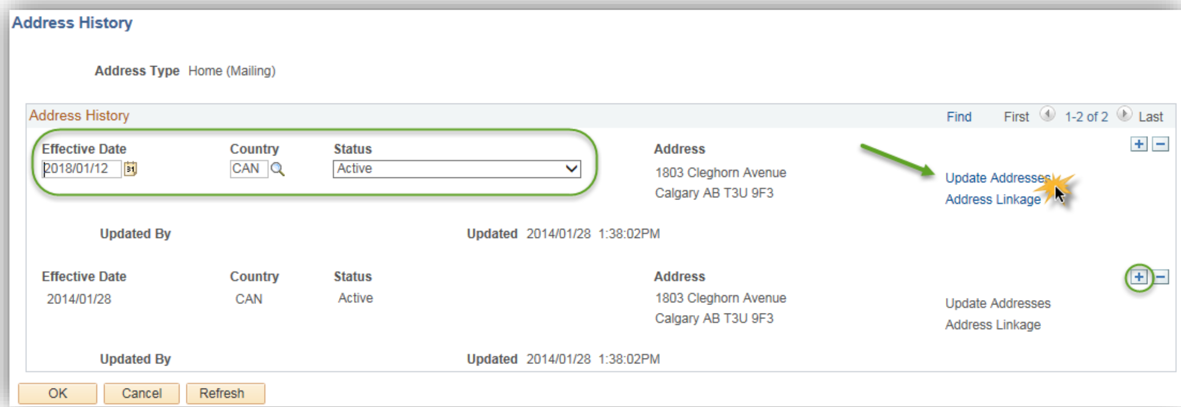


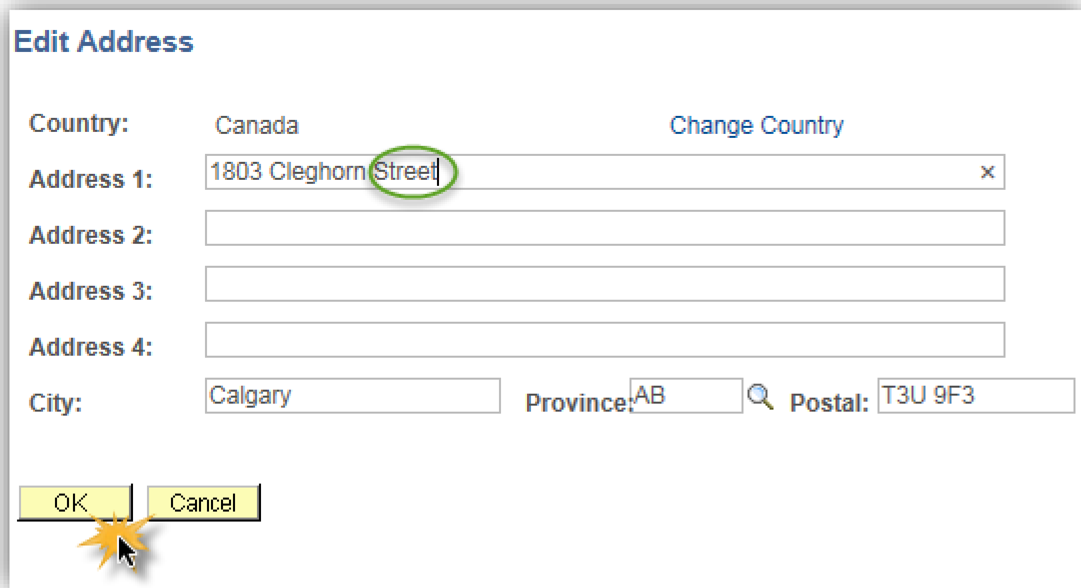
✧ ***Notes:***

►Edit/View Address Detail

Use the Edit/View Address Detail link to view the address history details for the address type.

Address History





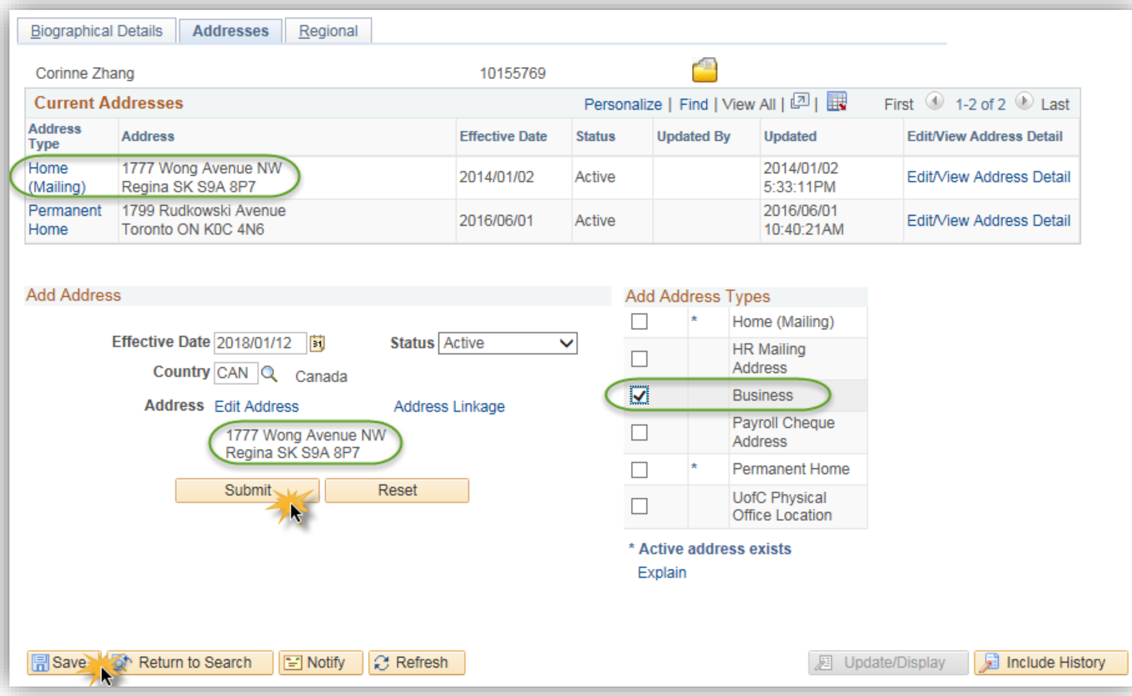
✧ ***Notes:***

►Update Addresses
The Update Addresses link is used to display the Edit Address page. Update the address information as required. Click the OK Button.

►Changes must be submitted and saved for the system to retain the updated address information

Copy an Address

A particular address often applies to more than one address type for an individual. For example, an individual's home and business addresses might be the same.

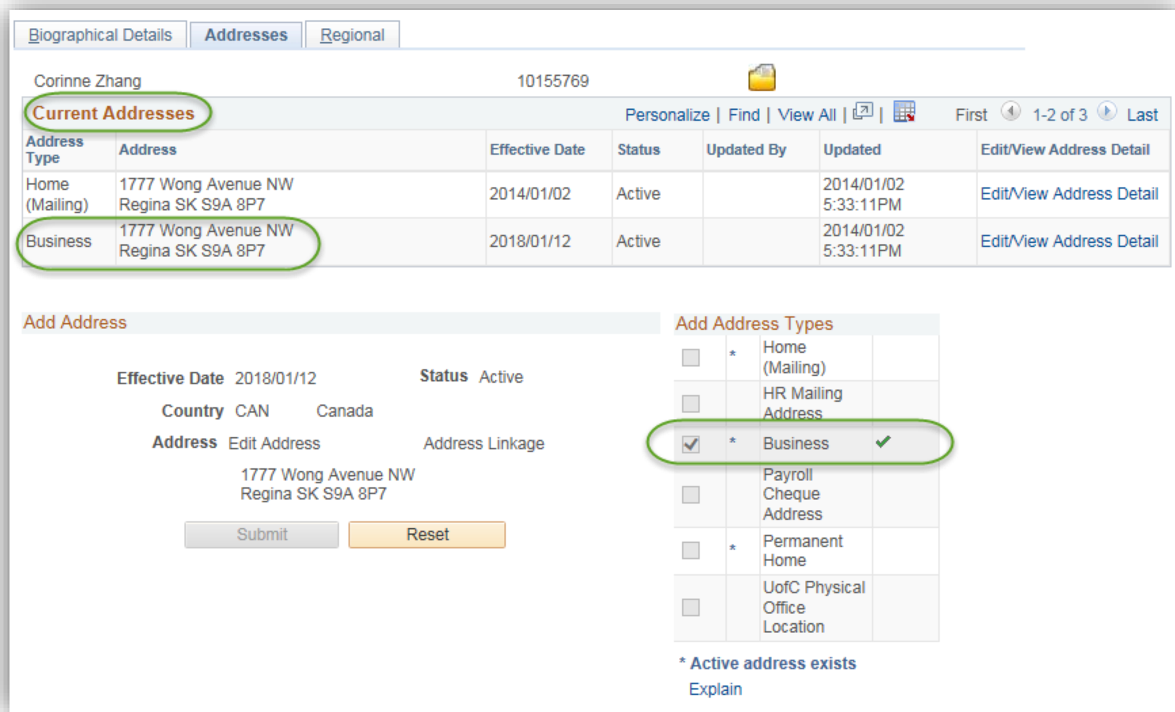


✧ ***Notes:***

►Select the desired address type in the Address Type column i.e. Home (Mailing) link. The Home (Mailing) address will display below the Edit Address Link in the Add Address area of the page.

►To copy the address, effective date, and status from one address type to other address types; the Add Address Types checkbox is used to select the desired address type to assign the data i.e. Business.

►The Submit button must be used to submit the new data and the Save button is used to save the new information.



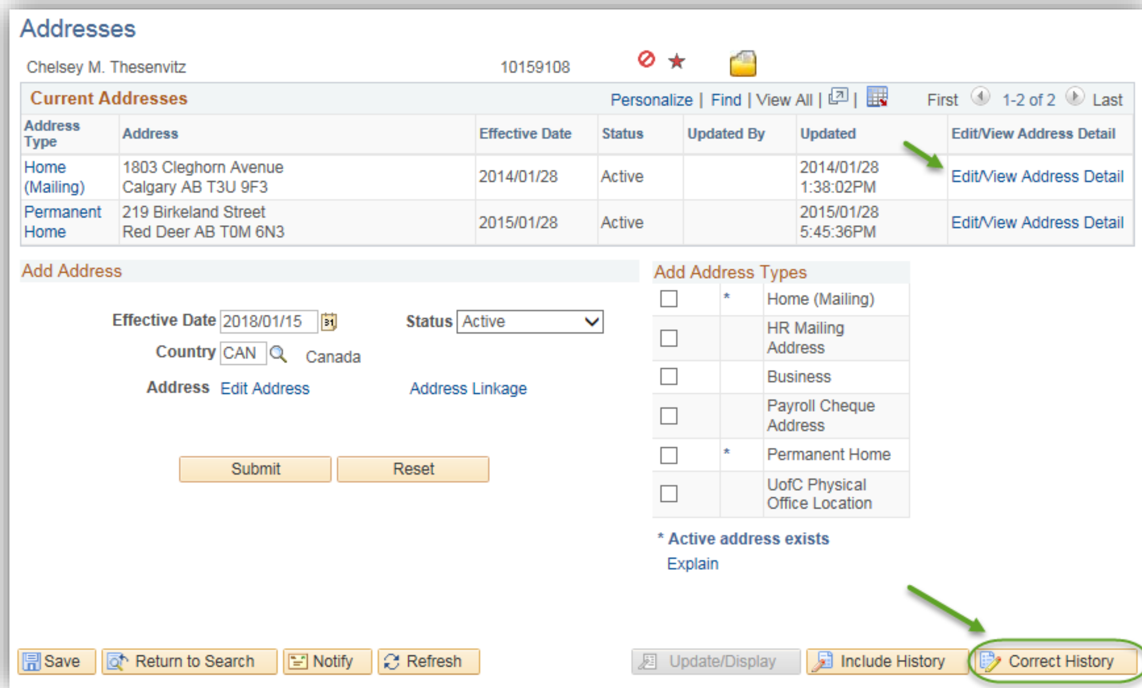
►Add Address Types
A green check mark indicates the successful creation of the address type.

A red 'X' mark next to an address type indicates an unsuccessful creation of that address type.

Unsuccessful creation of an address type can be caused by trying to create address types with duplicate effective dates or address types with effective dates that are earlier than the most current effective date already entered for that address type.

Correct Address Information

Address information entered incorrectly when creating a personal record for a student can be corrected using the “Correct History” feature residing *only* on the Address page.



✧ ***Notes:***

►The “Correct History” button is used to access the “correction” mode functionality.

►The Edit/View History link is used to access the specific address row requiring correction.

Phones

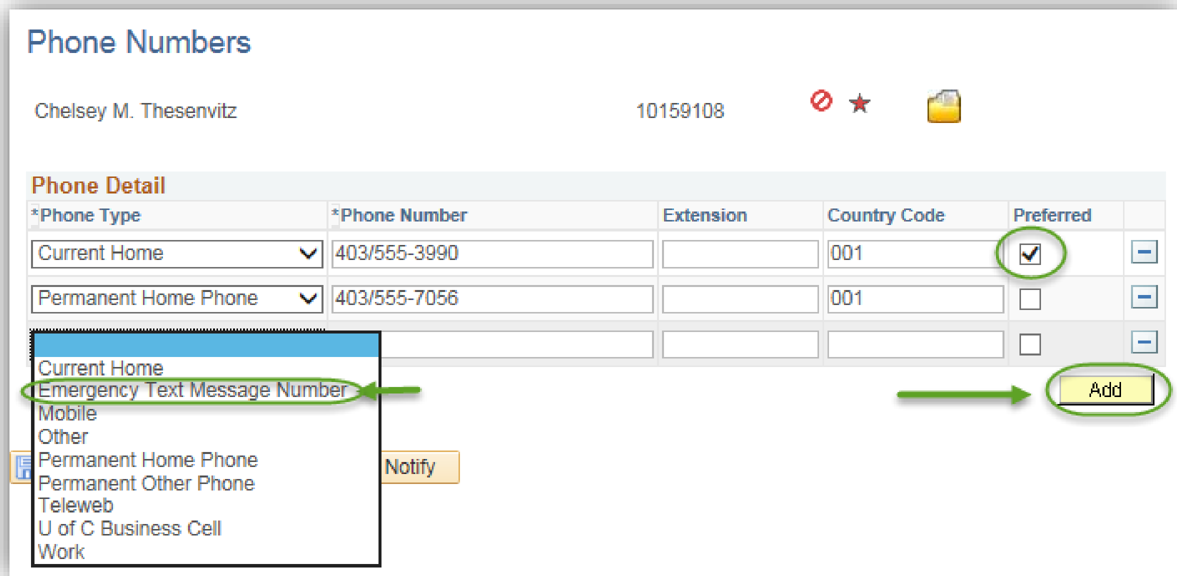
You can maintain various types of telephone numbers for individuals.

Navigation:

► **Breadcrumbs**
Campus Community >Personal Information (Student) >Biographical (Student) > Addresses/Phones >Phones

Phone Numbers

This page is used to add or update the phone information for an individual.



✧ ***Notes:***

►Preferred

Check the appropriate checkbox to indicate the preferred telephone number. If only one phone contact is provided, this should be indicated as the “preferred” phone contact.

►Emergency Text Message

An Emergency Text Message Number may also be recorded for emergency notifications from U of C authorities. Students have the capability to add this information in their Student Center as well.

Electronic Addresses

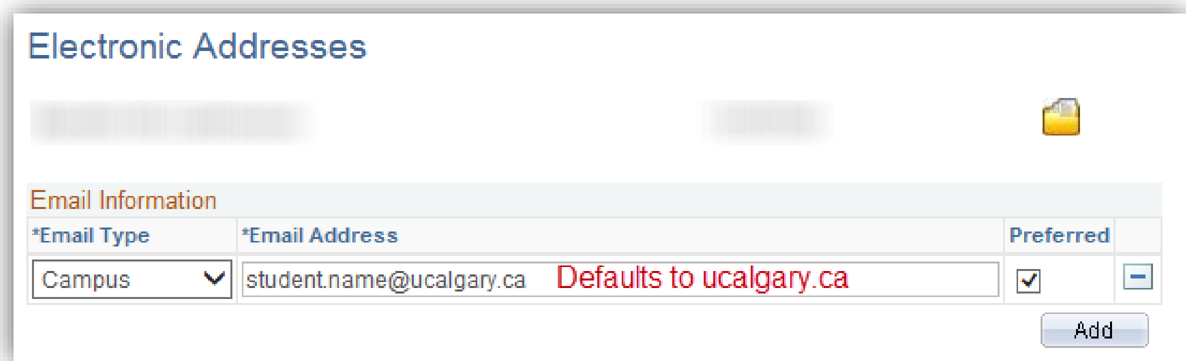
Effective October 2014 all active University of Calgary students have an email default of firstname.lastname@ucalgary.ca.

Navigation:

► **Breadcrumbs**
Campus Community >Personal Information (Student) >Biographical (Student) > Addresses/Phones >Electronic Addresses

Electronic Addresses

This page is used to add or update the electronic address information for an individual.



✧ ***Notes:***

►**Preferred**

Preferred indicates the individual's defaulted ucalgary.ca email address.

URL Information

►This information is not collected by the U of C.

Emergency Contacts

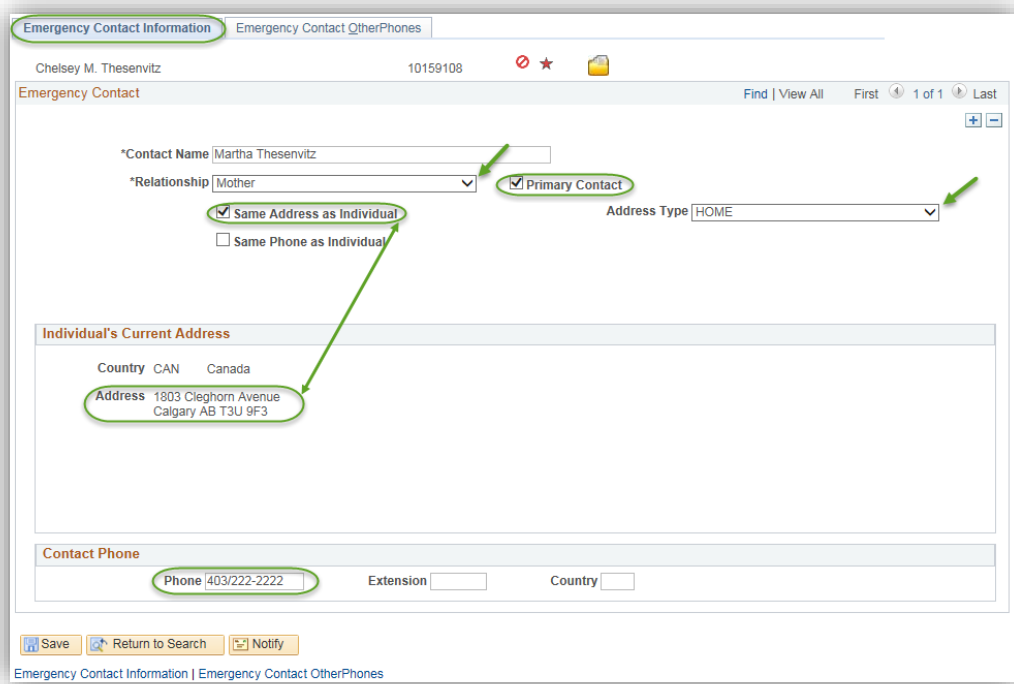
Names, addresses, and telephone numbers of people to contact when a student has an emergency situation can be recorded. Generally speaking this information is provided by Students via the web and there is no expectation that staff will update this data.

Navigation:

► Breadcrumbs
Campus Community >Personal Information (Student) >Biographical (Student) >Emergency Contacts

Emergency Contact Information

This page can be used to view or record emergency contact information for a student.



✧ ***Notes:***

►Primary Contact

One emergency contact must be indicated as the Primary Contact.

►Same Address as Individual

Check this checkbox to indicate the contact resides at the same address as the student. This automatically displays the student's current address.

►Same Phone as Individual

Check this checkbox to indicate the contact has the same phone number as the student. This automatically displays the student's phone information.

Extract Postal/Email Address

There are a few defined business processes which require the creation of mailing labels for a selected group of students. Additionally, there are many ad hoc requests for mailing labels or email addresses for applicants or students.

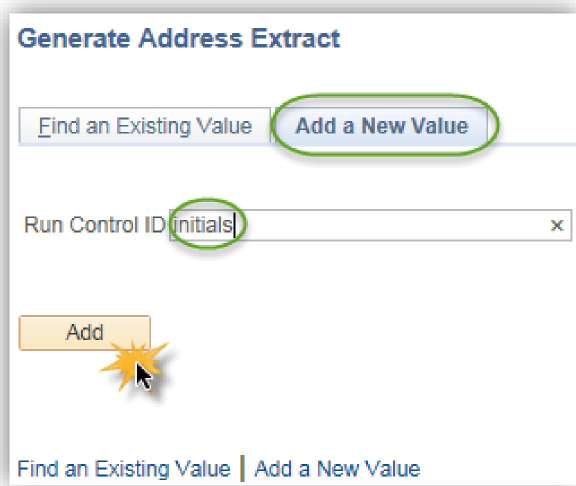
The Extract Postal or Email Address custom process is designed to allow users to extract postal or email addresses into a comma delimited file which contains name and address information that can be used to generate letters, address labels, or emails using Word merge.

Navigation:

► Breadcrumbs
Campus Community > Extract Postal/Email Address

Generate Postal Extract

This page is used to create the Run Control ID required to run this batch process.



✧ ***Notes:***

►Add A New Value

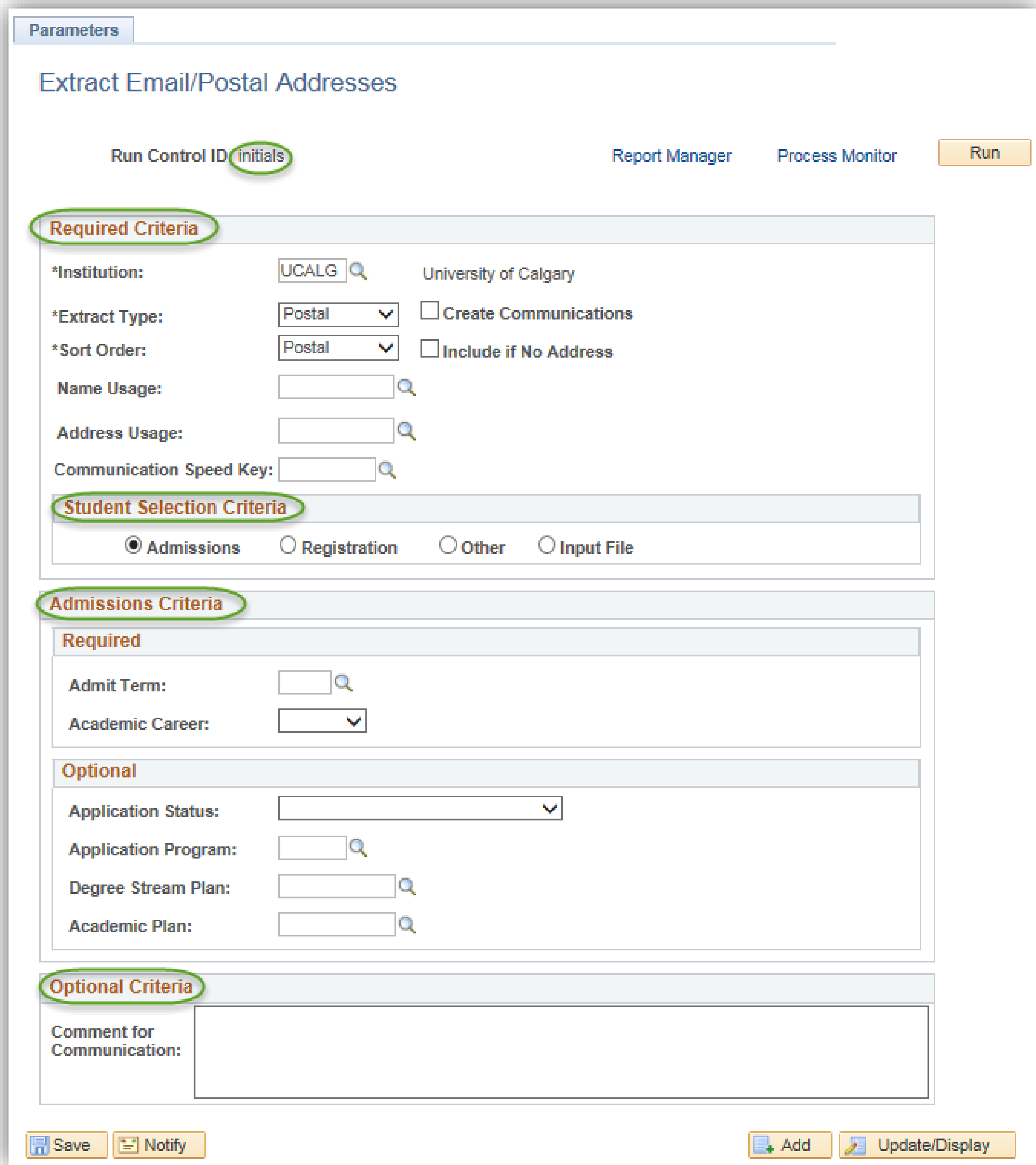
The Add a New Value tab is used to create a new Run Control ID (name the process); for example you can use your initials. The Run Control ID should not contain any spaces. They are also attached to your Operator ID and cannot be deleted once created. The name of the Run Control ID does not affect the outcome of the extract.

►Find an Existing Value

Once the Run Control ID has been created, the next time you can use the Find an Existing Value tab to display the list of Run Control ID's you have created.

Extract Email/Postal Addresses

This page is used to generate the Extract Email/Postal Addresses process.

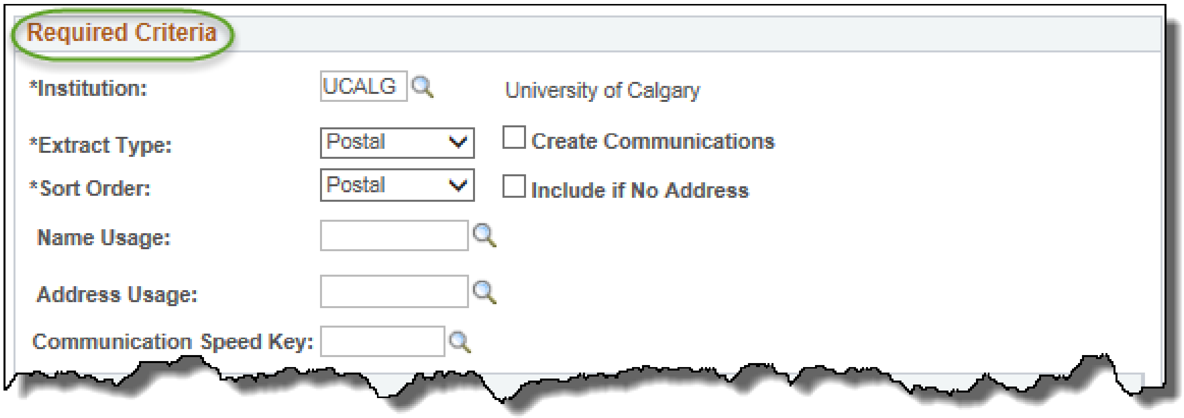


✧ ***Notes:***

►The Extract Postal/Email Address process is run based on the Required Criteria, Student Selection Criteria and the Optional Criteria entered.

Required Criteria

This portion of the page is used to determine the Extract Type, Sort Order, Name Usage and Address Usage.



✧ ***Notes:***

►Extract Type
The drop down list is used to display the available Extract Types; Postal addresses or Email address.

►Sort Order
Postal addresses can be sorted by name or postal code. Email addresses can only be sorted by name.

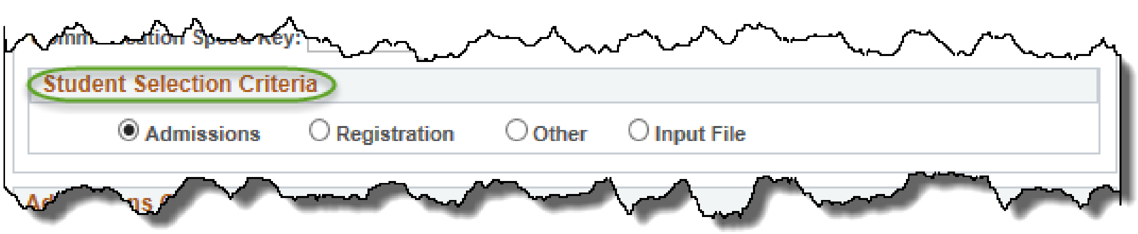
►Name Usage
This field allows you to select how you wish the name format to be displayed.

►Address Usage
This field allows you to select the desired address to be extracted; Home or Permanent Home.

►Communication Speed Key
A communication record can be sent from this screen but there are security restrictions and this would normally be used for “official” communications.

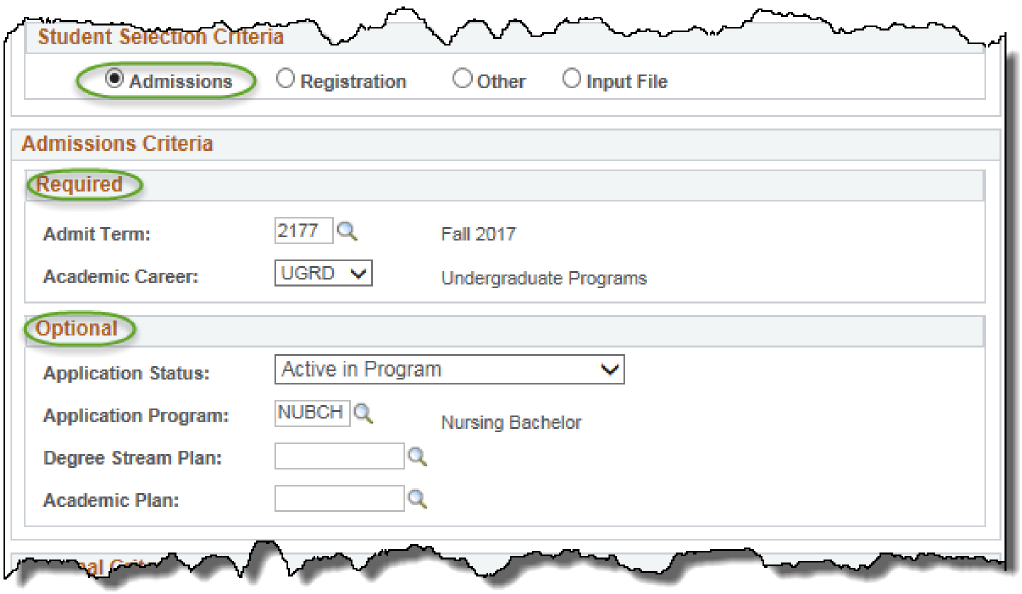
Student Selection Criteria

This area of the window is used to determine the student selection i.e. Admissions, Registrars, Other or a specific file can be uploaded.



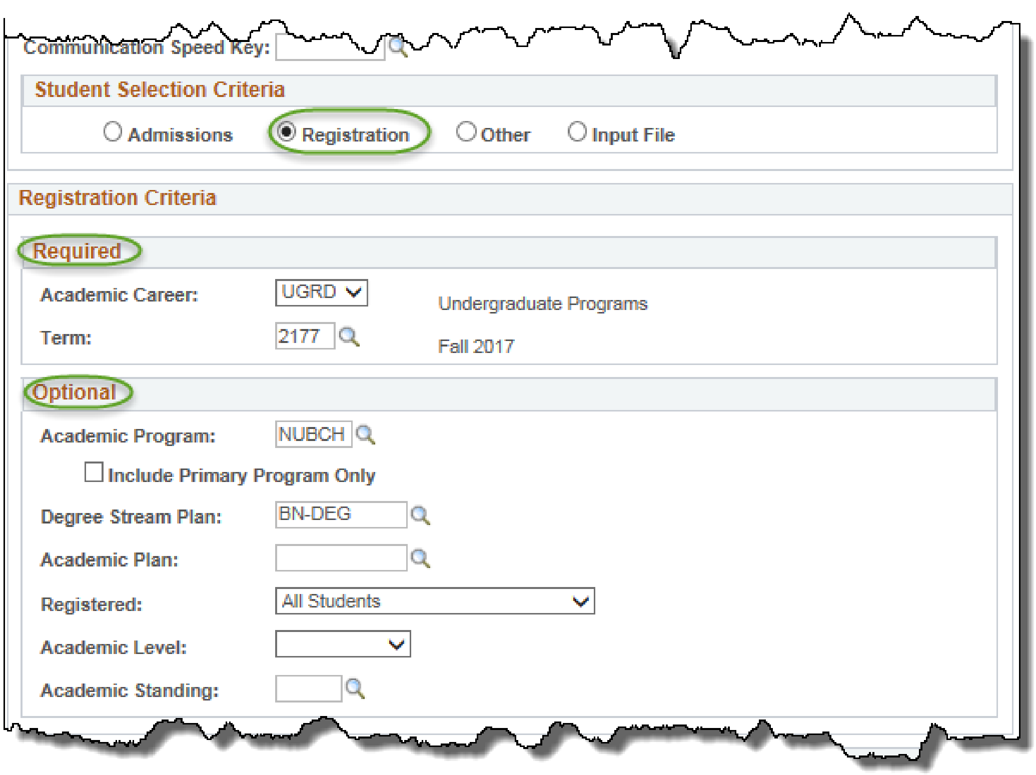
Selection Criteria - Admissions

When the Student Selection is Admissions, this area of the page is used to enter the Admissions criteria.



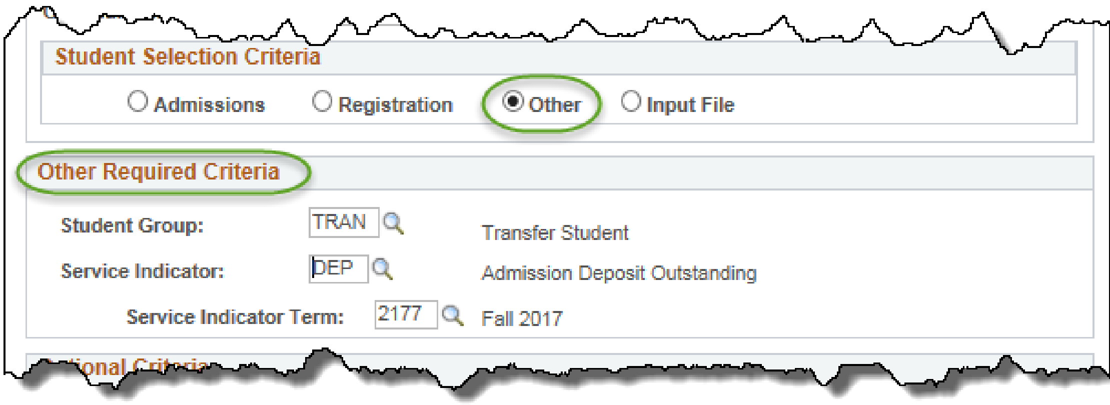
Selection Criteria - Registration

When the Student Selection is Registration, this area of the page is used to enter the Registration criteria.



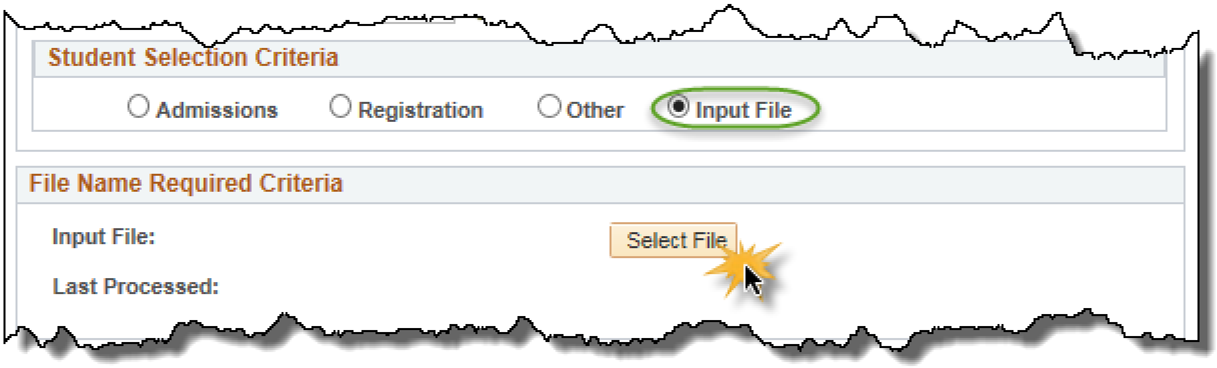
Selection Criteria – Other

This area of the page can be used to enter "Other" criteria if Admissions or Registration criteria do not meet the requirements. This selection criteria is based on a specific student group associated with a specific Service Indicator. For example labels can be generated for all Transfer Students with Outstanding Fees.



Selection Criteria - Input file

This area of the page is used to import a file of specific EmplID's for ad hoc requests.

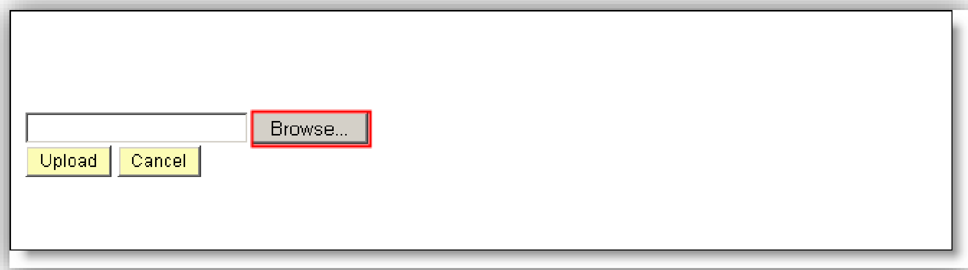


✧ ***Notes:***

►Select File

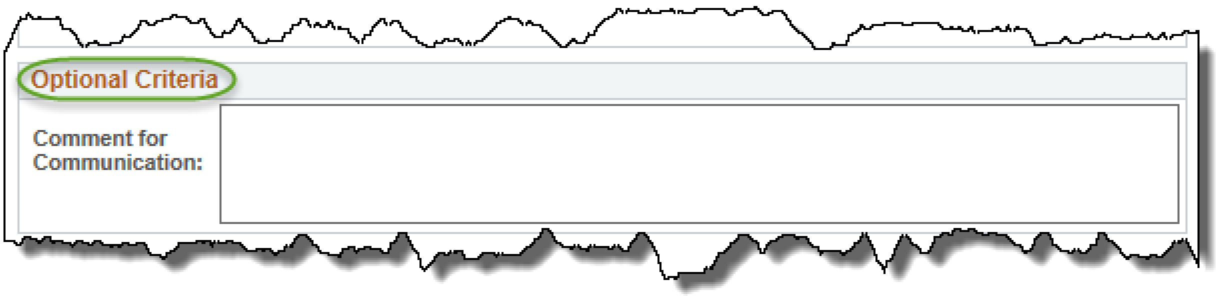
The Select File button is used in order to browse and upload the desired file. *(This process is similar to adding an email attachment.)*

Important Note: the Input File must be in a .txt format.



Optional Criteria

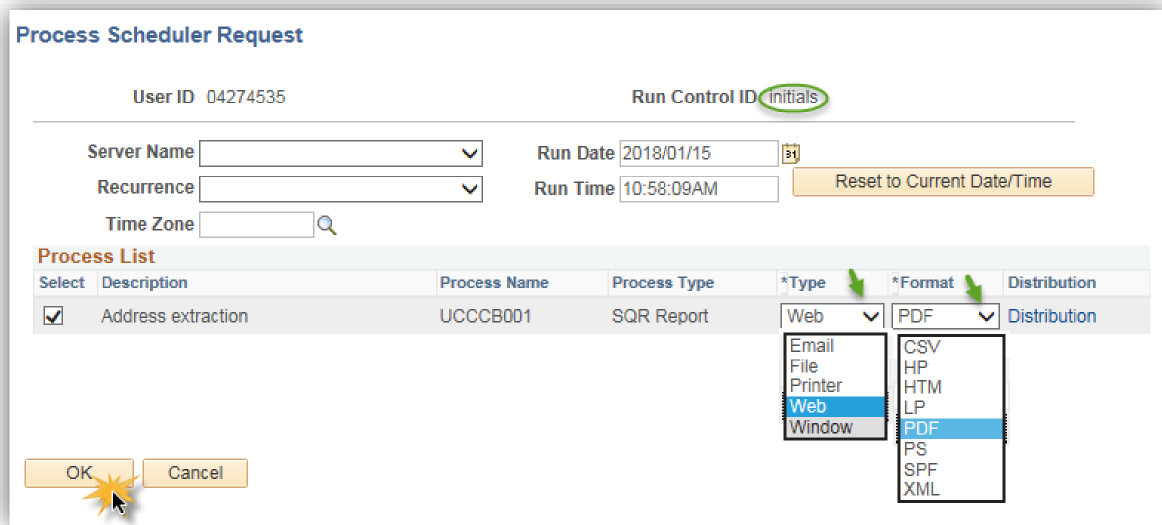
The Optional Criteria can be used to enter a Comment for Communications.



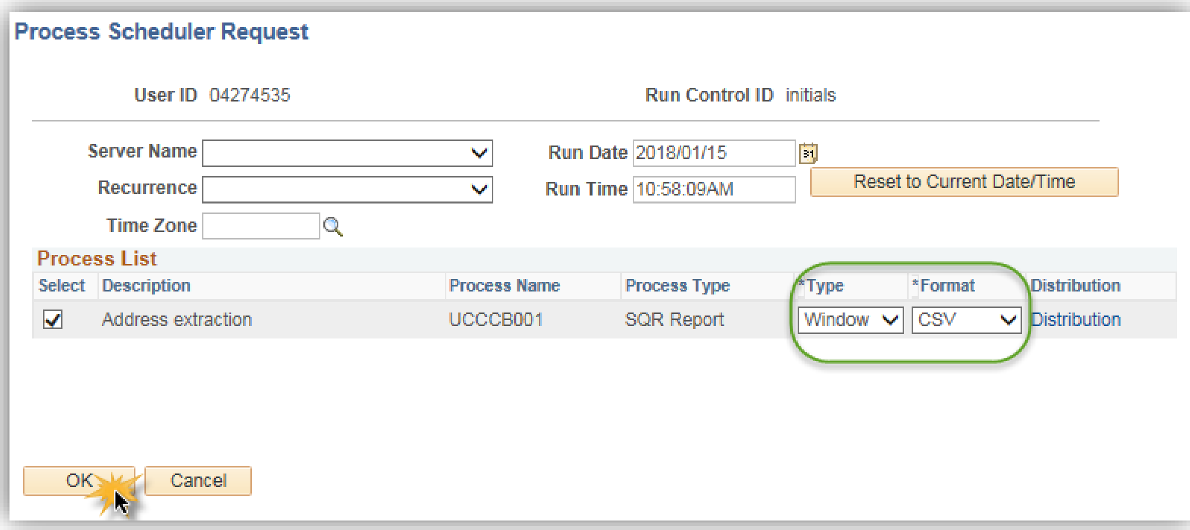
Run the Process – Process Scheduler Request

The “Run” button 

accesses the Process Scheduler Request page which enables you to set the run date and time, how often the process runs (the recurrence of the process), output type, and format.



For example: Select Type = Window and Format = CSV:



✧ ***Notes:***

►Server Name

This field is left blank.

►Recurrence

The request can be set to run at recurring intervals.

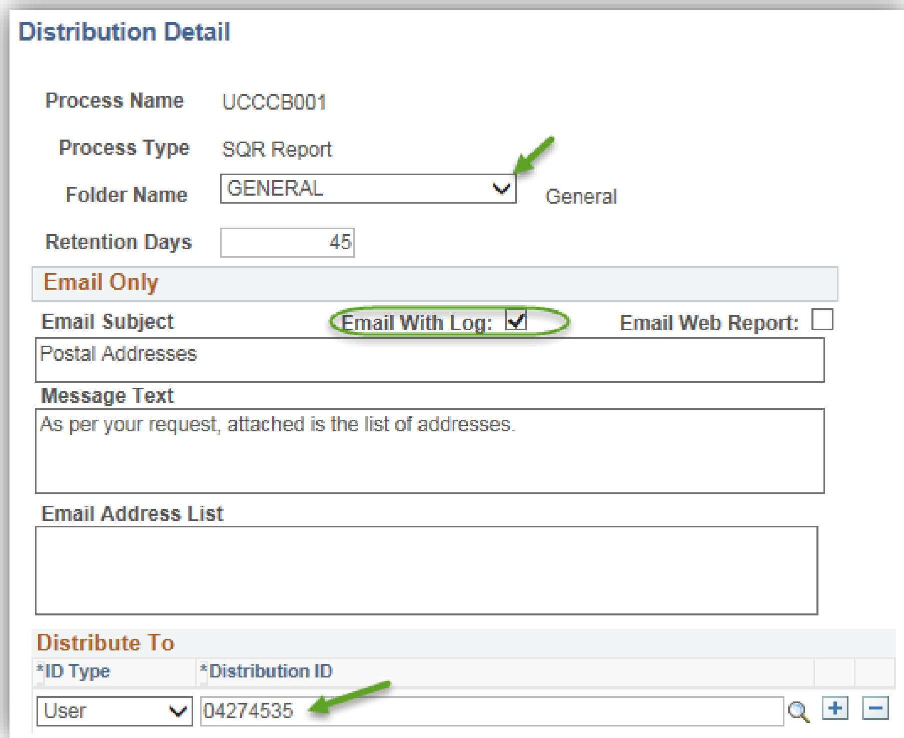
►**Run Date:**
This field is used to enter the desired date to run the process.

►**Run Time**
This field is used to enter the desired time to run the process.

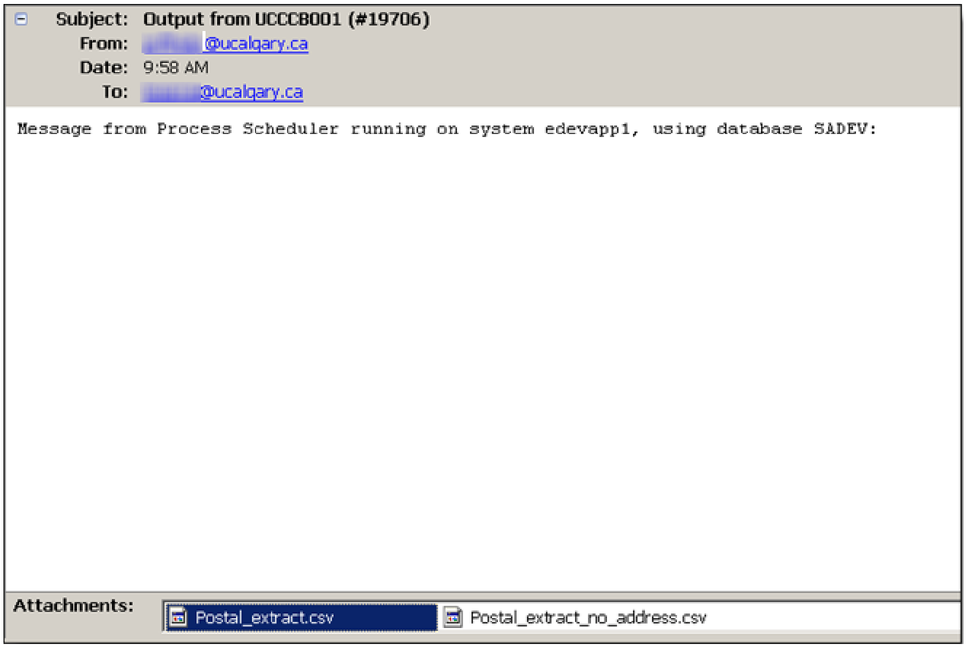
►**Type**
Use the Type field to determine the output type for this process.

►**Format**
Use the Format field to determine the output format for this process.

►**Email**: Sends the output through an email. To distribute a report to an email list, enter the appropriate information on the Distribution Detail page by clicking the Distribution link.

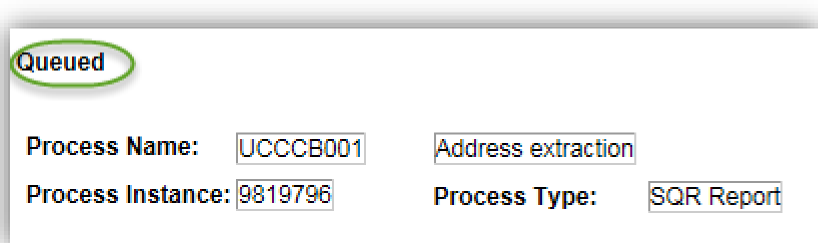


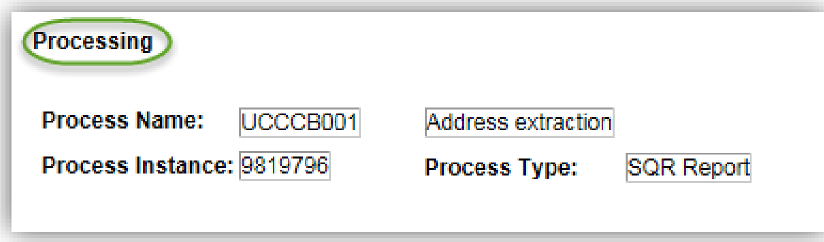
By default, the output is sent through email to the person running the process.

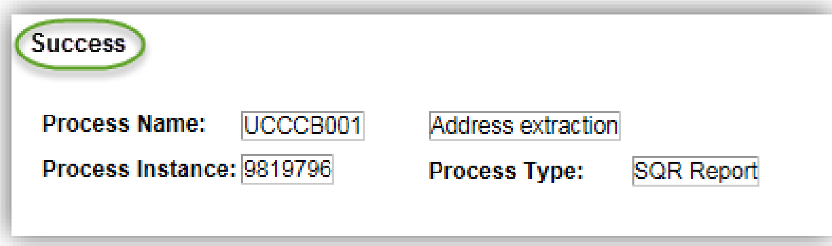


►**Web**: Sends all output of the process to the report repository, including log and trace files. The report instance displays below the run button.

►**Window**: Sends the output to a new browser window. The status of the process now appears in the new browser window before displaying the results. The different states can be *Queued, Initiated, Processing, Success, Error*, or *Warning*. All output for the process is also sent to the report repository, including log and trace files.







Once the status changes from “Queued” to “Processing” to “Success” the Report automatically displays.

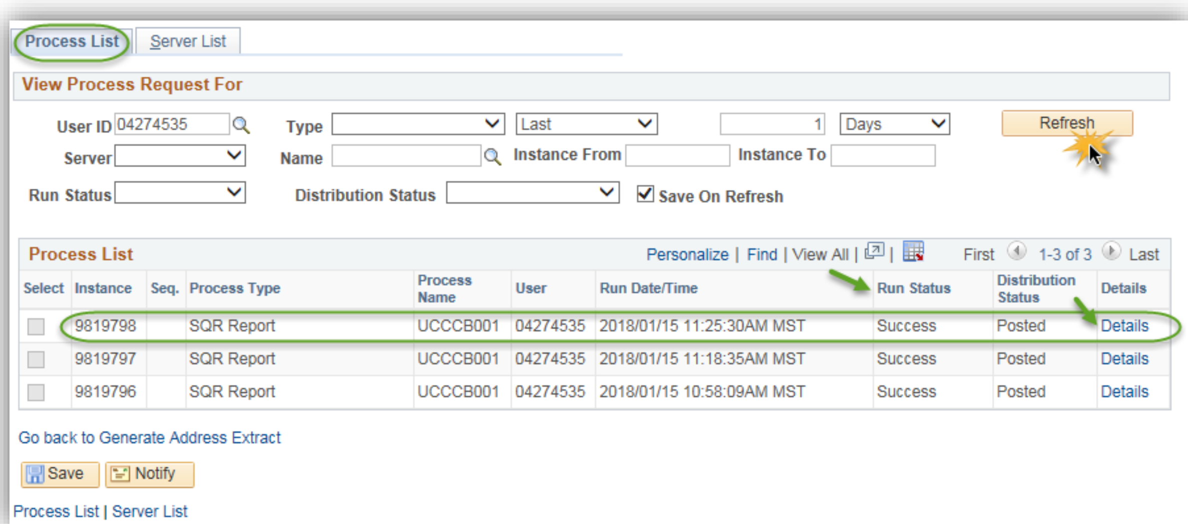
►**Format**
The Format for this process should always be CSV.

►**Distribution**
The Distribution link is used to access the Distribution Detail page, where you enter additional distribution information when the output type is *Web, Window,* or *Email.* Also use this page to select a folder name to which the output should be distributed when the output type is *Web* or *Window*. *(**see screen shots on previous pages**)*

Process Monitor

✧ ***Notes:***

The Process Monitor link accesses the Process List page. This page lets you monitor the process request submitted. Note there are 3 examples listed.



► 

Use the Refresh button to check the current status of a process. This button refreshes the list.

►Instance

This is the order in which the process occurred in the queue. This number is auto generated. A specific instance or range of instances can be requested.

►Run Status

Select if you want to view processes by a specific status, such as *Success* or *Error*.

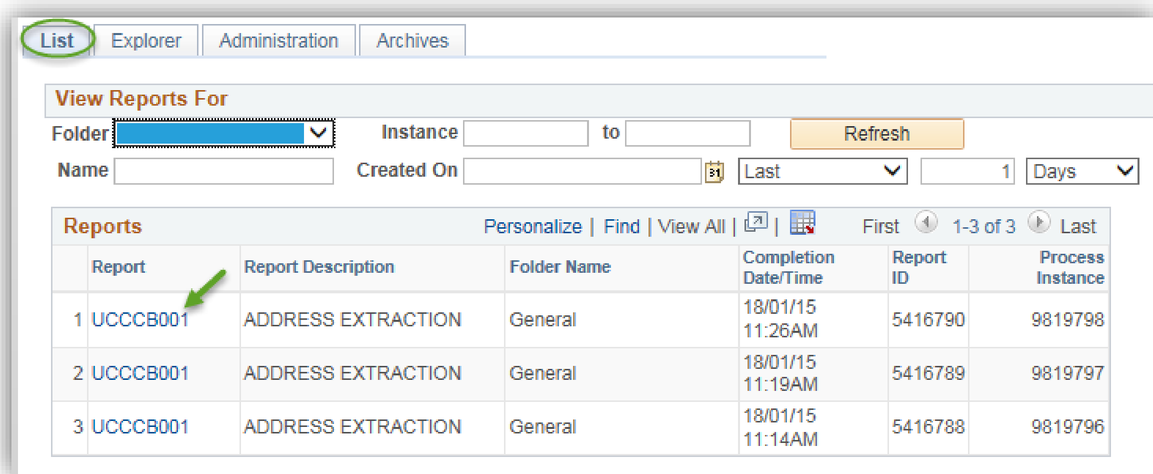
Report Manager

✧ ***Notes:***

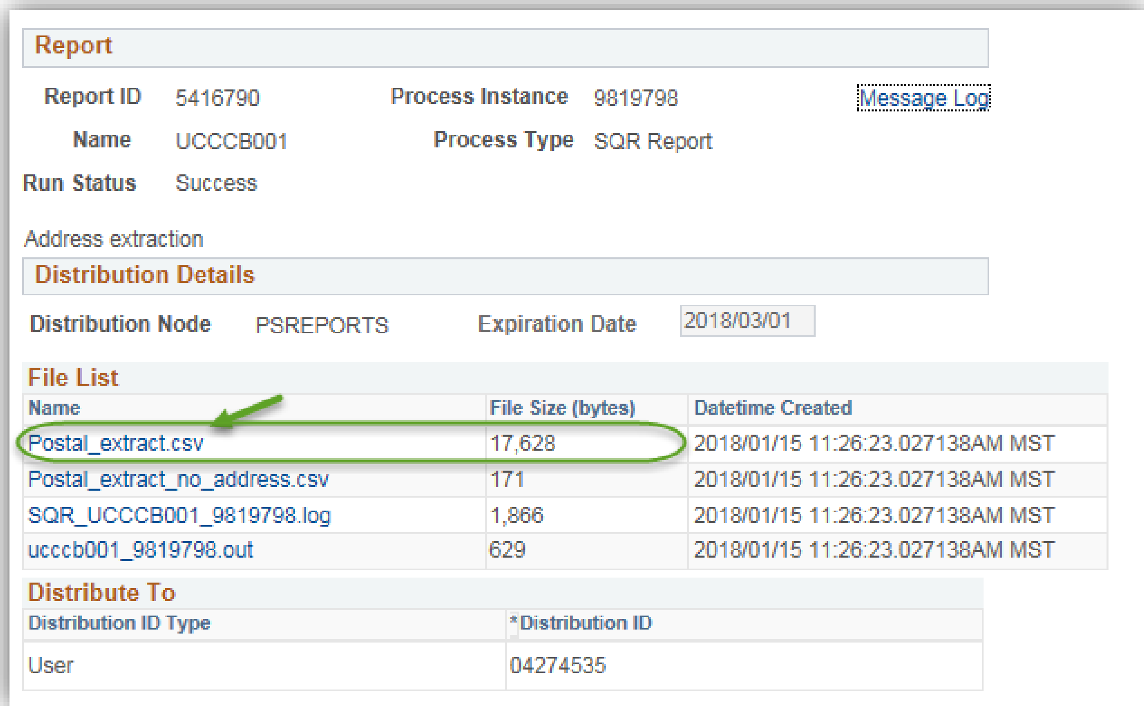
Report Manager is like your own personal inbox of reports and process output. It provides a secure way to view report content, check the posting status of your output, and see content detail messages.

Use the Report Manager link to access the Report List.

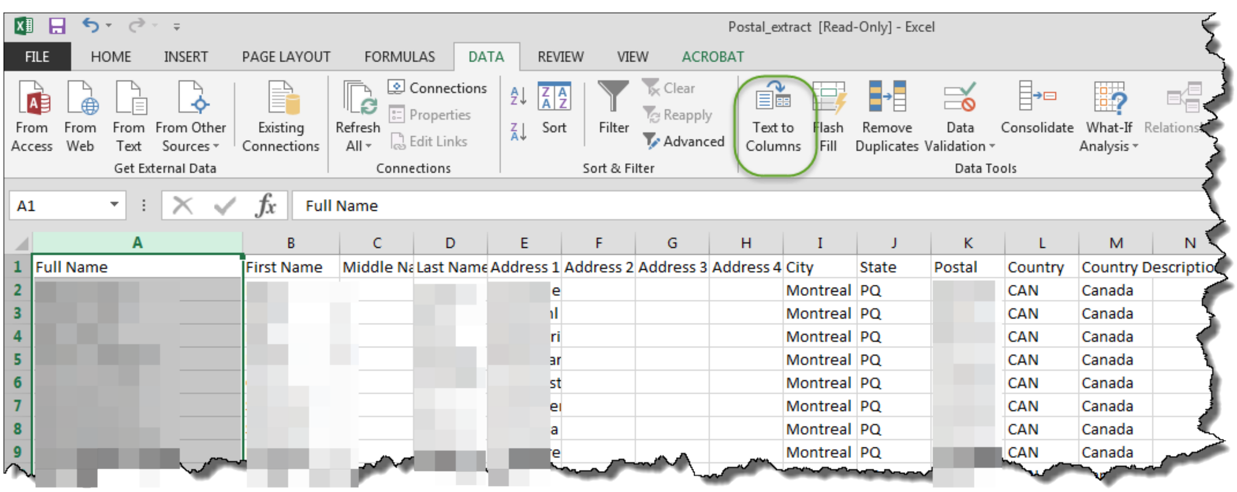
Report Manager can also be accessed by using the navigation menu path Reporting Tools> Report Manager.



Use the Report link to view the Report.



The Name link is used to view the extract details.



Create/Maintain Identification Data

Identification data including Citizenship Data, Visa/Permit data (where applicable), Residency data (e.g. whether an applicant or student is considered 'Canadian' or 'International' for fee calculation purposes; as well as the Alberta Student Number (where applicable) are captured and maintained within the Student Administration System.

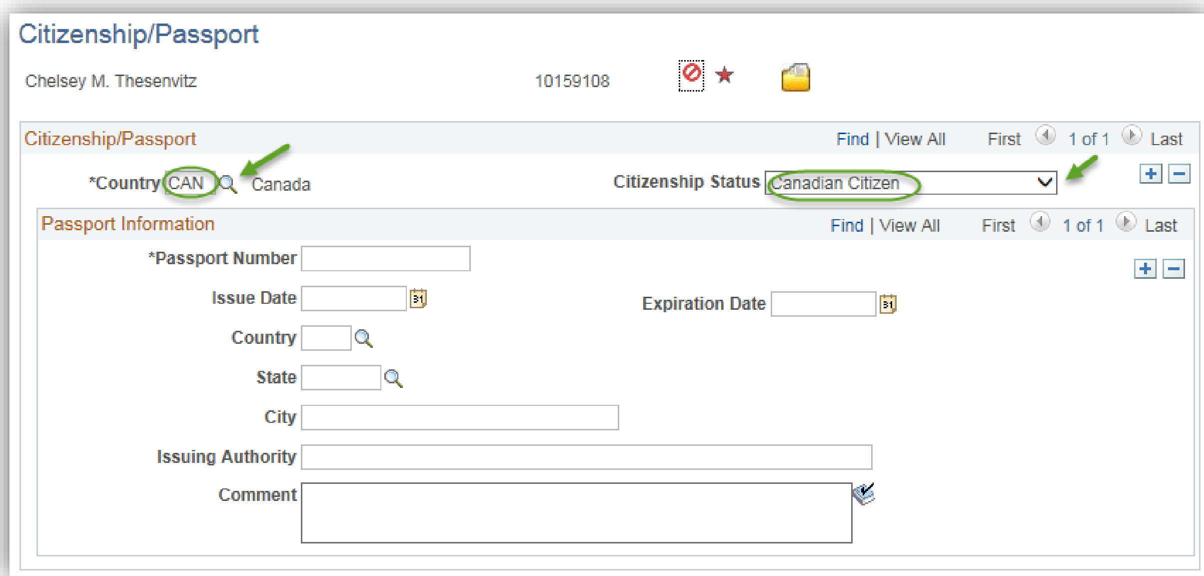
Create/Maintain Identification Data
This section discusses the Citizenship and Passport, Visa/Permit, Residency Data and External System ID components used to capture and maintain student identification data.

Citizenship and Passport

This page is identical to the Citizenship Detail page within the Component: Personal Information (Student) > Add/Update a Person on the Biographical Details tab. Country code is recorded for all applicants. The Citizenship Status is recorded only for Canadian Citizens. If the country of citizenship is not Canada, the Citizenship Status field is left blank.

Navigation:

► Breadcrumbs
Campus Community > Personal Information (Student) > Identification (Student) > Citizenship > Citizenship and Passport



Visa/Permit Data

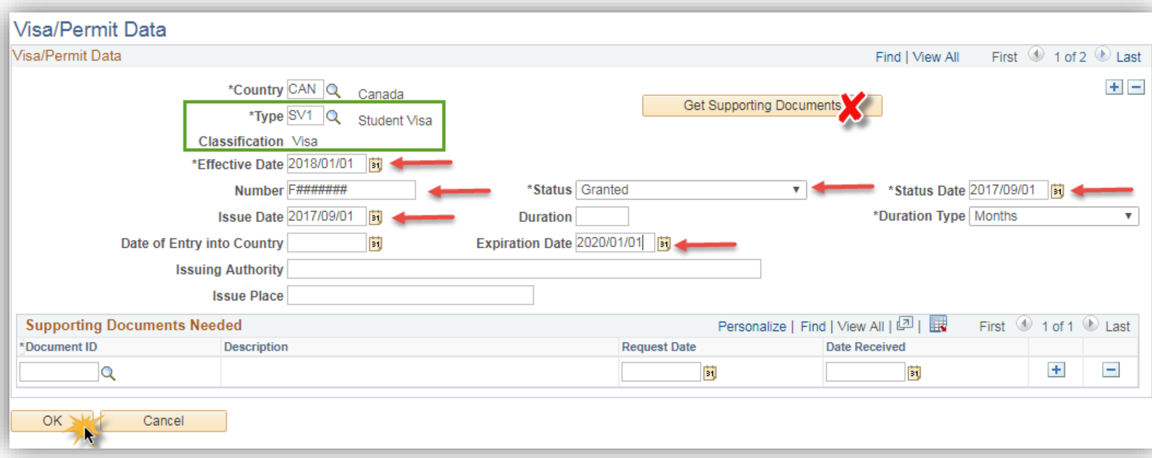
This page is identical to the Visa/Permit page within the Component: Maintain Bio Demo Data/Add a Person. This page is used to capture the details concerning a student's Visa/Permit.

Navigation:

► Breadcrumbs
Campus Community > Personal Information (Student) > Identification (Student) > Citizenship > Visa/Permit Data

Visa/Permit Data is used to record the students Visa/Permit information when the individual is not a Canadian Citizen.

The following displays the fields required to update the Visa Study Permit information on a student's record. This information is required in order to hire and pay a student and also for record keeping.



For the Effective Date, enter the <u>first day of the month the permit was issued</u> (e.g. January 1, 2018). It is very important the date is entered as the first day of the month as all the scholarship/funding payments are made on the first of each month. Enter the number on the permit. All Student Visa numbers begin with the letter F. Enter the date on the permit. The Status Date must be the same as the Date Issued on the Permit.

Important Notes:

The Country code must be set to CAN before selecting the Visa type in order to display the valid Visa types for Canada.

Normally, users do not record detailed information regarding a Work Permit (WP) or Visa Permit (SV1) for international students; instead, a Permit status of 'applied' is entered.

When entering Visa Permit data for new applicants, ensure that the effective date on the application Program page is the same as the effective date on the Visa Permit Data page.

Users who choose to enter additional Permit data will need to follow these rules:

- If there is a Work Permit (WP) or Visa Permit (SV1) number populated, then the Status should be 'granted'.
- Expiry date and permit number must be entered.
- Work Permit type should be 'WP' and start with a 'U'.
- Visa Permit type should be 'SV1' and start with an 'F'.

Residency Data

Residency Data must be recorded for all students before they can be Term Activated, register in courses, and have tuition fees assessed.

Residency information is captured on the Residency Data page. This information will be used for processing financial aid as well as tuition and fees.

This component will automatically be updated for Undergraduate and Graduate applicants at the time the initial application is entered (either through the web application for admission or manually), after which any updates to this data must be done manually and must be accompanied by supporting documentation.

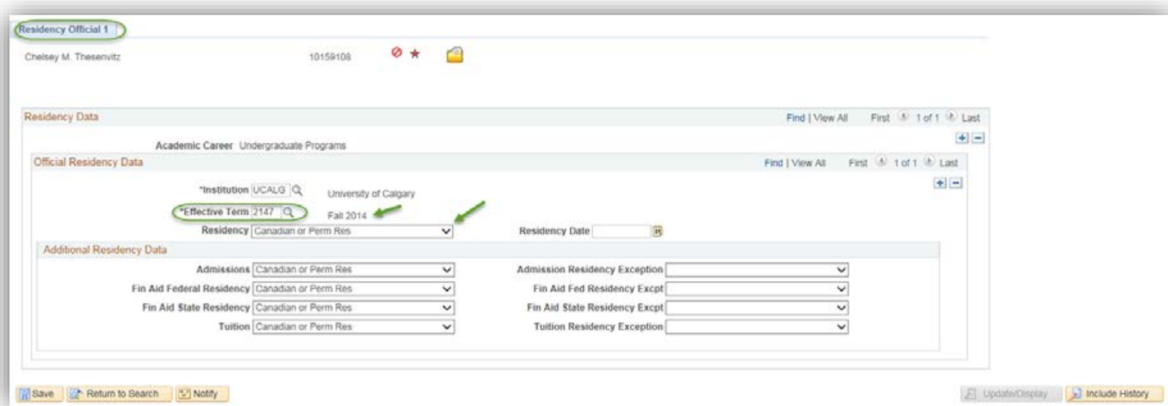
Navigation:

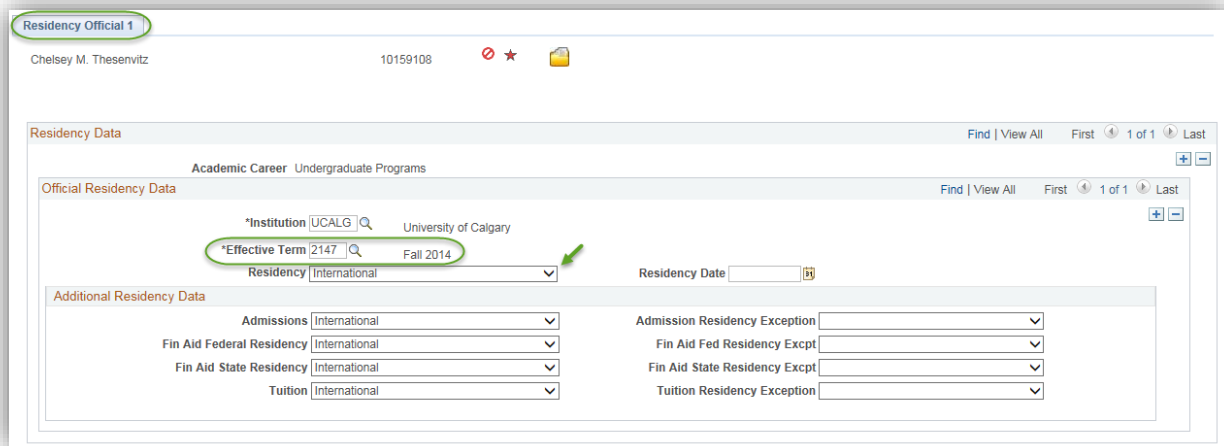
► Breadcrumbs
Campus Community > Personal Information (Student) > Identification (Student) > Residency Data

Residency Official 1

This page is used to record the official residency data for a student. The student must be admitted to default the effective date term.

This information is collected for Federal Financial and Taxation reporting purposes. This component would also be used if the individuals Residency status has changed i.e. from International to Permanent Resident.



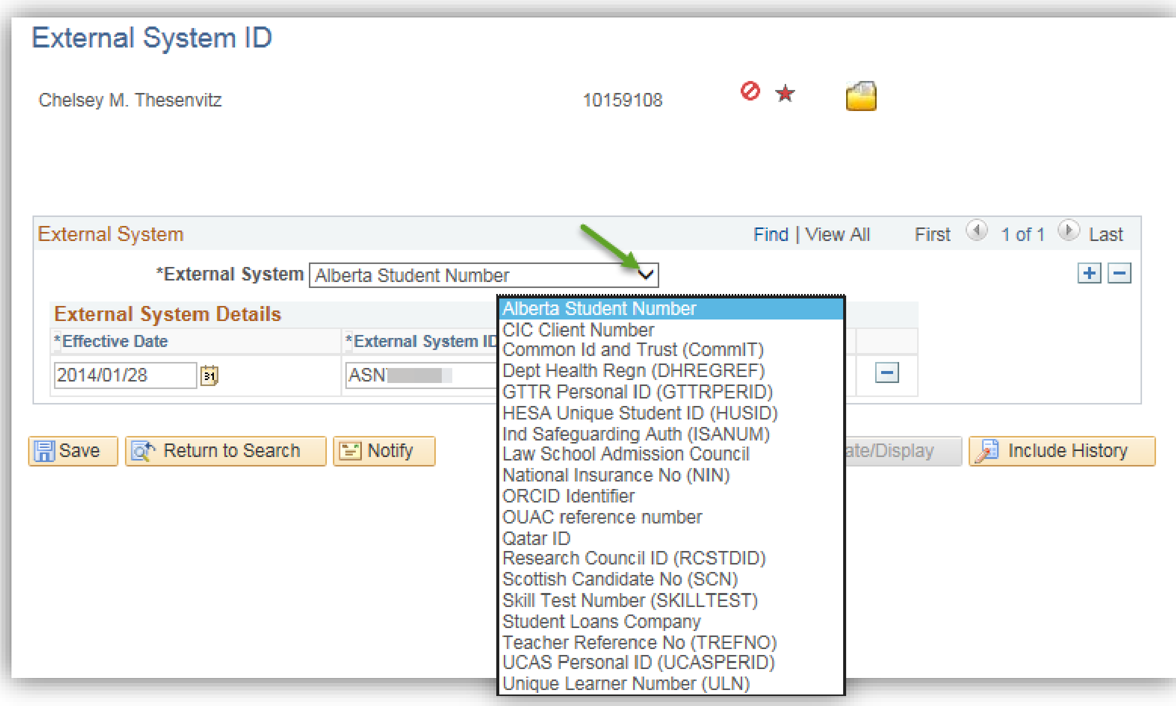

Residency Official 1
Chelsey M. Thesenvitz
10159108
Residency Data
Find | View All
First 1 of 1 Last
Academic Career Undergraduate Programs
Official Residency Data
Find | View All
First 1 of 1 Last
*Institution UCALG
University of Calgary
*Effective Term 2147
Fall 2014
Residency International
Residency Date
Additional Residency Data
Admissions International
Fin Aid Federal Residency International
Fin Aid State Residency International
Tuition International
Admission Residency Exception
Fin Aid Fed Residency Excpt
Fin Aid State Residency Excpt
Tuition Residency Exception

External System ID

The External System ID component is used to record the Alberta Student Number when available. This component is also used to record the CIC Client number and the Ontario University Applications Centre OUAC number.

Navigation:

► **Breadcrumbs**
Campus Community > Personal Information (Student) > Identification (Student) > External System ID



Organization Location Summary

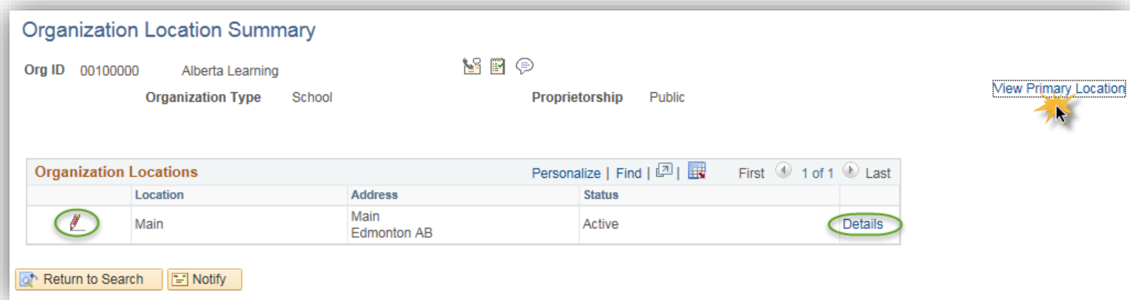
This component discusses the various pages associated with viewing the summary of the Organization locations.

Navigation:

► Breadcrumbs
Campus Community > Organization > Review Organizations > Organization Location Summary

Organization Location Summary

This page is for viewing a summary of the organizations locations. The information displayed cannot be changed on this page. The links can also be used to access and view additional information.



✧ ***Notes:***

►View Primary Location
Use this link to access the Organizations Primary Location page to view data for the primary location for this organization

►Details
The Details link accesses the Organization Phone Information page, where the phone and electronic address information for this organization location can be viewed.

Organization Department Summary

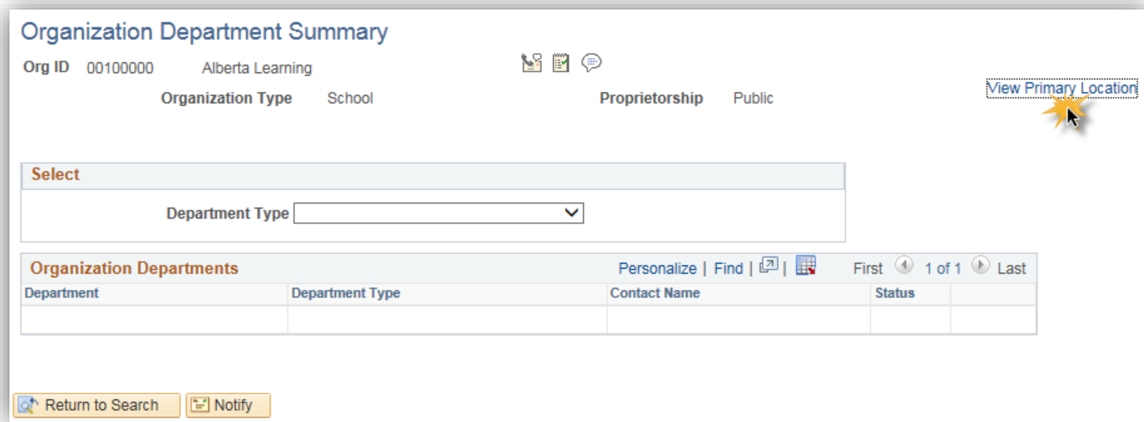
This component discusses the various pages associated with viewing the summary of the Organization Departments and how to access related pages to view additional Department information.

Navigation:

► Menu Path
Campus Community > Organization > Review Organizations > Organization Dept. Summary

Organization Dept. Summary

This page is for viewing a summary of an organization's departments. The information displayed cannot be changed on this page. The links can also be used to access and view additional information.



✧ ***Notes:***

Department Details

►The links displayed on this page can be used to access the primary location, phone and location details. These pages have view access only unless authorization to update has been granted.

Organization Contacts Summary

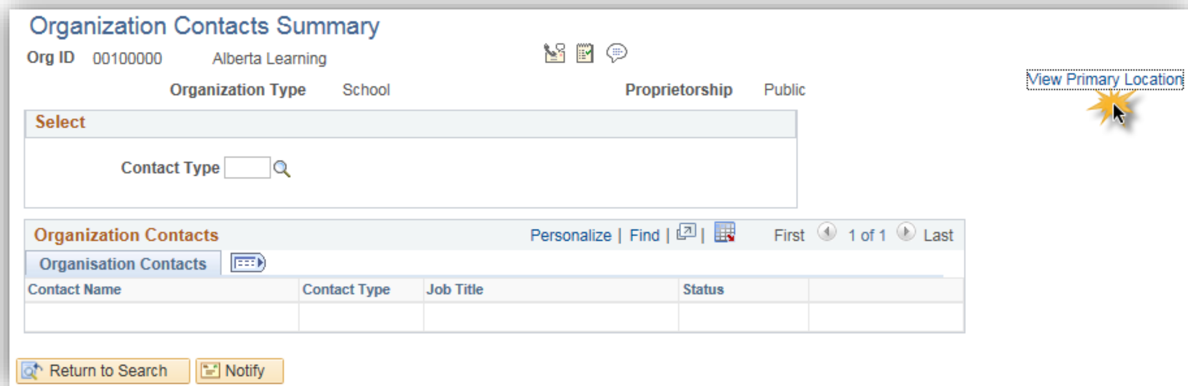
This component outlines the process for displaying a summary of the organizations contacts.

Navigation:

► Menu Path
Campus Community > Organization > Review Organizations > Organization Contacts Summary

Organization Contacts Summary

The Organization Contacts Summary page displays a summary of the organization's contacts. Links also appear on this page which access supplementary pages for additional information.



✧ ***Notes:***

Contact Details

►The link displayed on this page can be used to access the primary location, phone and location details. These pages have view access only unless authorization to update has been granted.

Understanding the 3 C's – Communications, Checklists and Comments

Checklists, Comments, or **Communications** can be added to a student record either manually or automatically by authorized staff. This section explains how communications, checklists and comments are used to track and analyze correspondence, list requirements and enter notes for students.

The ability to add/edit Communications, Checklists and Comments is based on the 3C security access assigned to the user.

3C buttons appear on many pages in the system.

Communications	Transfers you to the appropriate Communications Management page, where you can create communications for a student.
Checklists	Transfers you to the appropriate Checklists Management page, where you can create Checklists for the student.
Comments	Transfers you to the appropriate Comments page, where you can enter Comments.
View or Edit	Click to transfer to where you can view or edit the communication assignment.

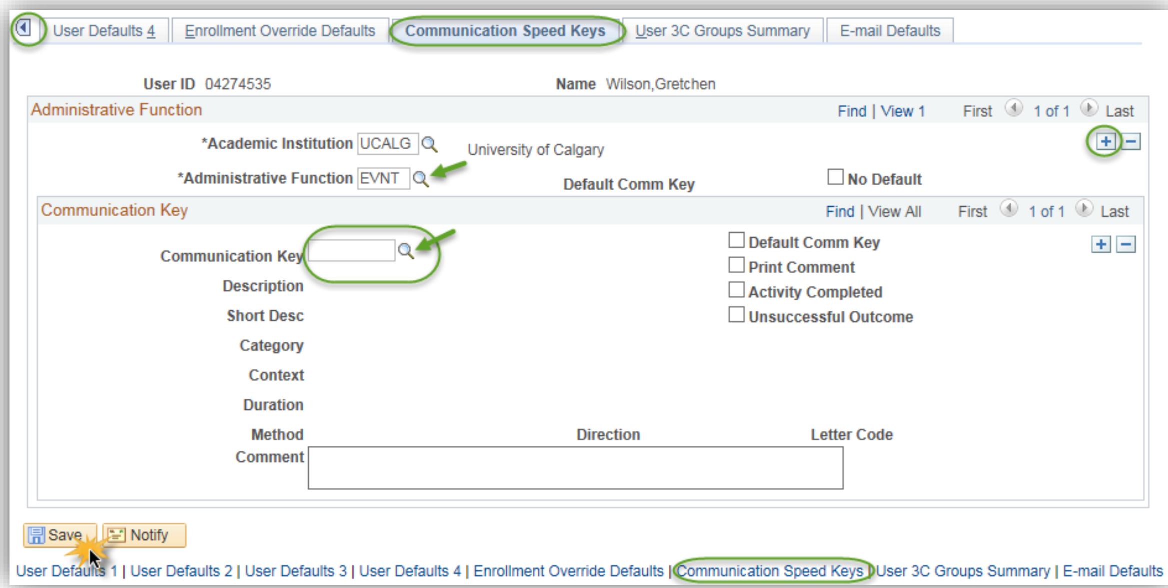
Note:
The **View** link is available when the user has 3C group *inquiry* access for the communication category. The **Edit** link is available only when the user has 3C group *update* access for the communication category.

User Defaults – Communication Speed Keys

Before a staff can create a communication record, Communication Speed Keys must be set up in the users "User Default' page. This page is used when user's wish to set default's for specific pages or functions within the Student Administration System, such as defaults for Academic Information, Financial and Admissions Data, Admissions Application Data, Communication Speed Keys, etc.

Navigation:

► Breadcrumbs
Set Up SACR > User Defaults > Tab: Communication Speed Keys



✧ ***Notes:***

►Administrative Function
Speed Keys are tied to Administrative Function codes, so this code must be added before adding the Comm Key code. The plus sign is used to add additional Administrative Function codes.

►Comm Key
The Comm Key field is used to select the desired Comm Key. The list of values that display are based on the Administrative Function selected. The plus sign is used to add additional Comm Keys corresponding to this Administrative Function.

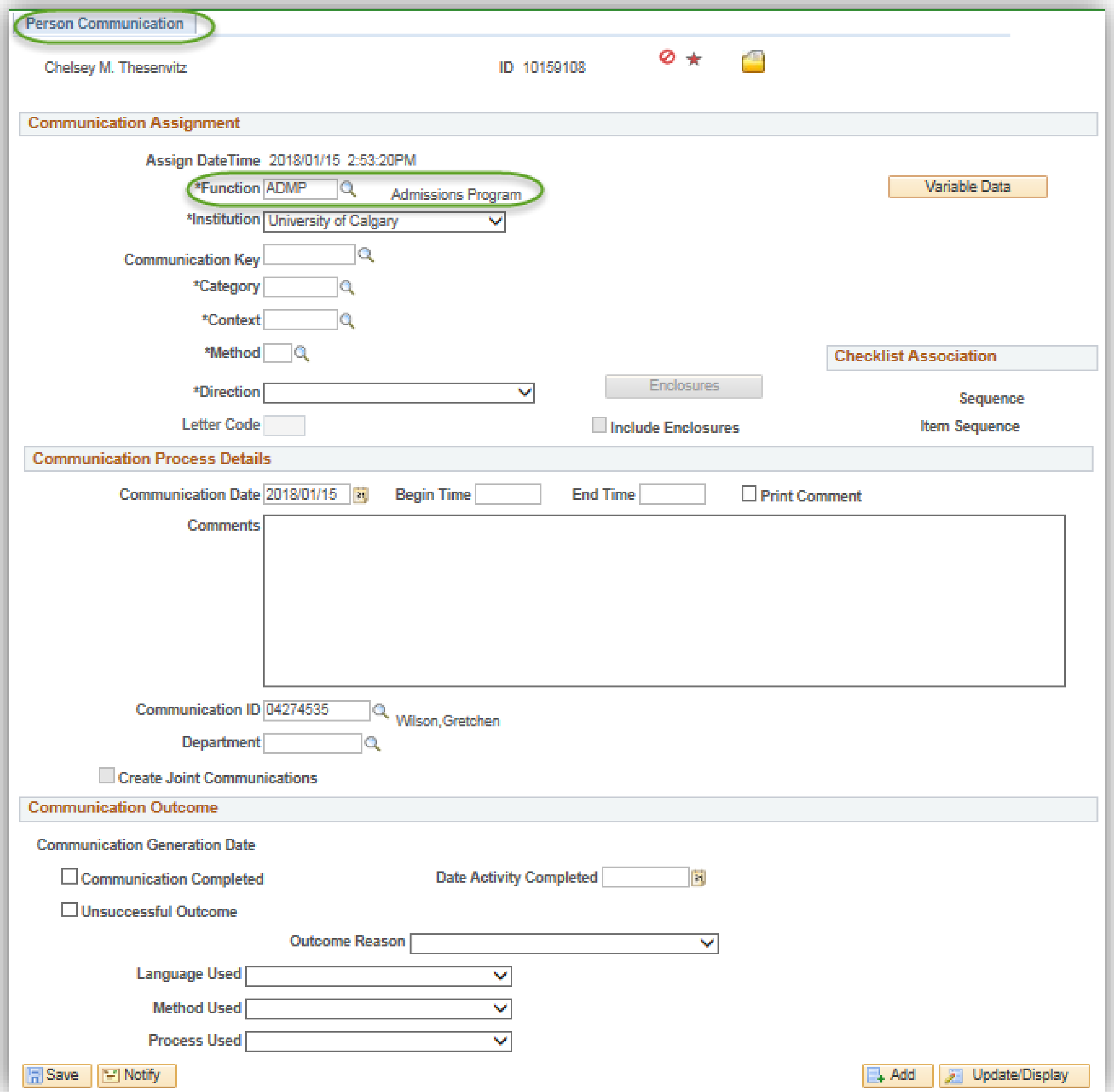
Communication Management

The PeopleSoft Communication component provides an electronic record of communications (e.g. letter, email etc.).

Navigation:

► Breadcrumbs
Campus Community > Communications > Person Communications > Communications Management

This component can also be accessed by selecting the Communications icon which opens the component in a new window.

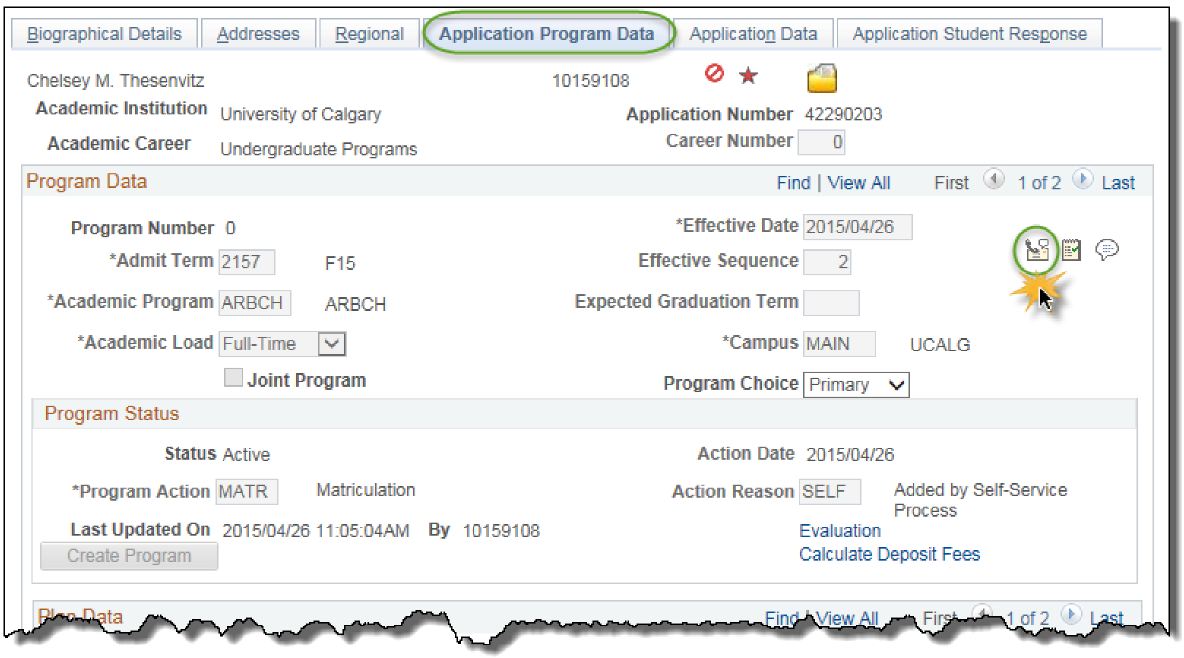


Important note: The Communication icon is designed to facilitate adding new communications. To review communications already assigned, you must access the component from the navigation menu (*refer to the navigation menu above*) which opens the Search page.

Navigation:

► Breadcrumbs
Student Admissions > Application Maintenance > Maintain Applications > Tab: Application Program Data

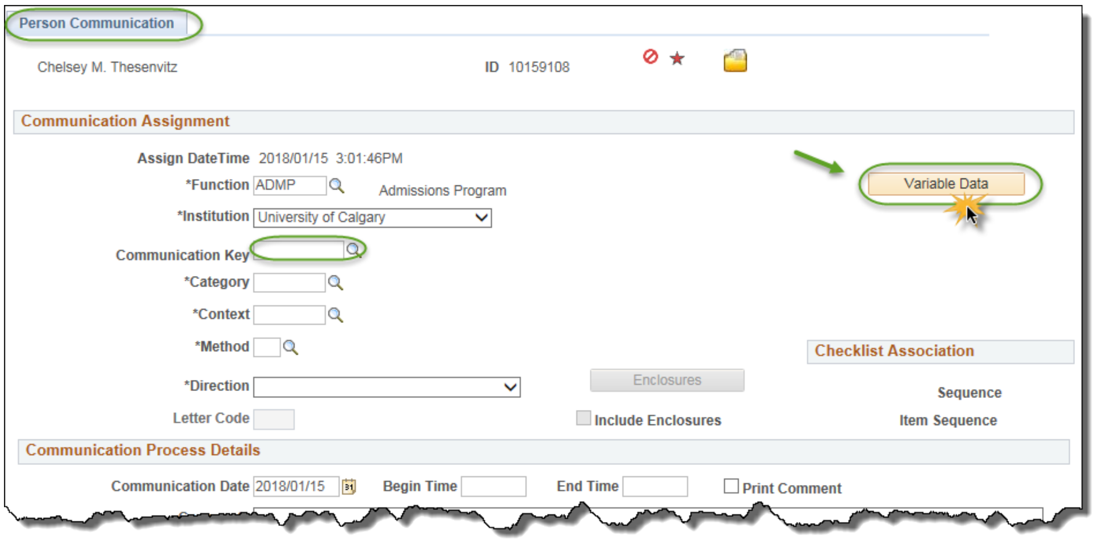
For Admissions staff the preferred navigation to view a communication would be through Student Admissions.



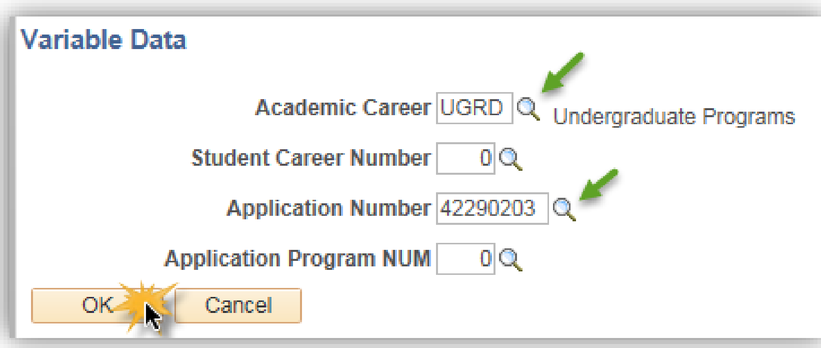
Person Communication

The Person Communication page is used to manually assign a communication to an individual. Communication records can be created to capture all types of contact with students using the Communication Management component.

Person Communication



Top of Page



✧ ***Notes:***

►If you transferred to this page by clicking the Communication button on another page (as per the example above), the Administrative function and Variable Data associated with the Administrative function, transfers here.

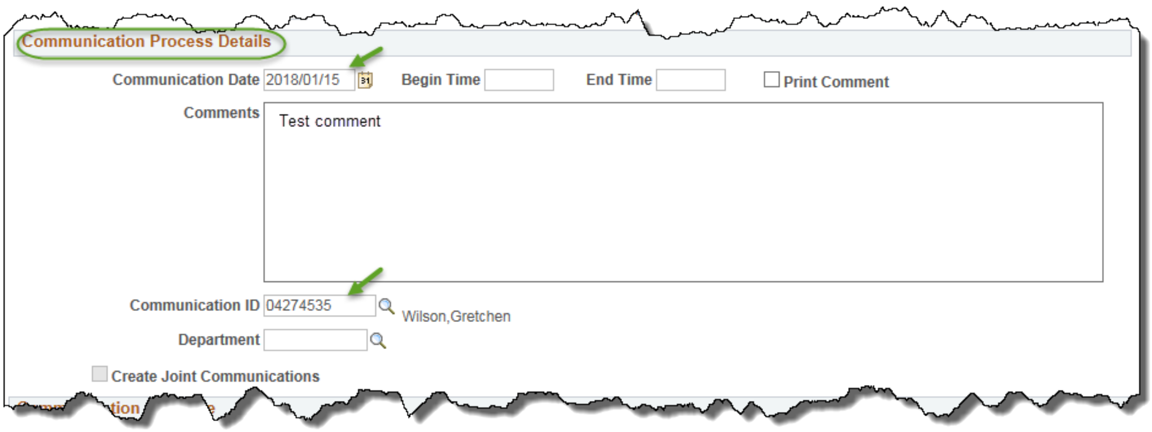
If you did not transfer here from a functional area, you must enter the function, institution and variable data.

►**Variable Data**
This button is used to access the Variable Data page, where you can view or enter the required variable data associated with the Academic Career and Application Number. The fields displayed on this page may vary based on the administrative function selected.

►**Comm Key**
The Comm Key (speed key) allows staff to add a communication record with minimal data entry. The Category, Communication Context, Method, Direction, and Letter Code fields for this communication will automatically be created based on the Communication Key selected.

Communication Process Details

Middle of Page



✧ ***Notes:***

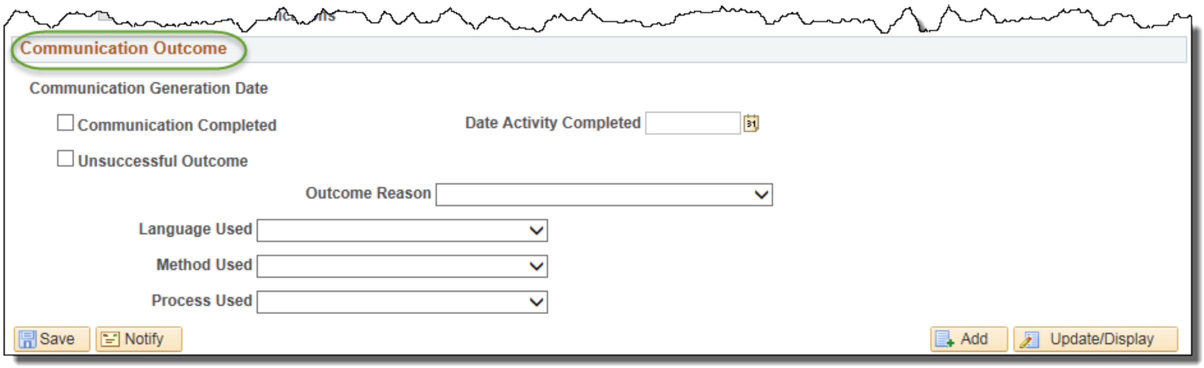
►**Date Letter Printed**
The date when the communication, if a letter, was produced by running the letter generation data extract process. This field indicates that letter extract data was successfully completed for this communication.

►**Communication ID**
The ID and name of the person who added the communication will automatically display when the Communication Management component is accessed using the Communications icon from another page.

Communication Outcome

The Communication outcome displays the status of a Communication Record.

Bottom of Page



✧ *Notes:*

►Communication Completed

This checkbox indicates the communication has been successfully completed.

This checkbox may be checked manually or automatically checked by the system if a communication speed key is used. This is based on the information associated with the communication speed key or when letter generation is run for the communication.

►Unsuccessful Outcome

This checkbox can be checked manually or updated by a process. When checked, this indicates the communication was unsuccessful.

For example, the check box can be manually selected when a letter was returned undeliverable or telephone contact was unanswered.

This could also be automatically checked when a communication speed key was used based on the information associated with the communication speed key. The 'Letter Generation' data process extracts data for all ID's that are assigned a communication and are not marked complete

In the case of the 'Letter Generation' data process, an unsuccessful outcome means that the process was unable to extract all the data required to generate the letter.

►Reason

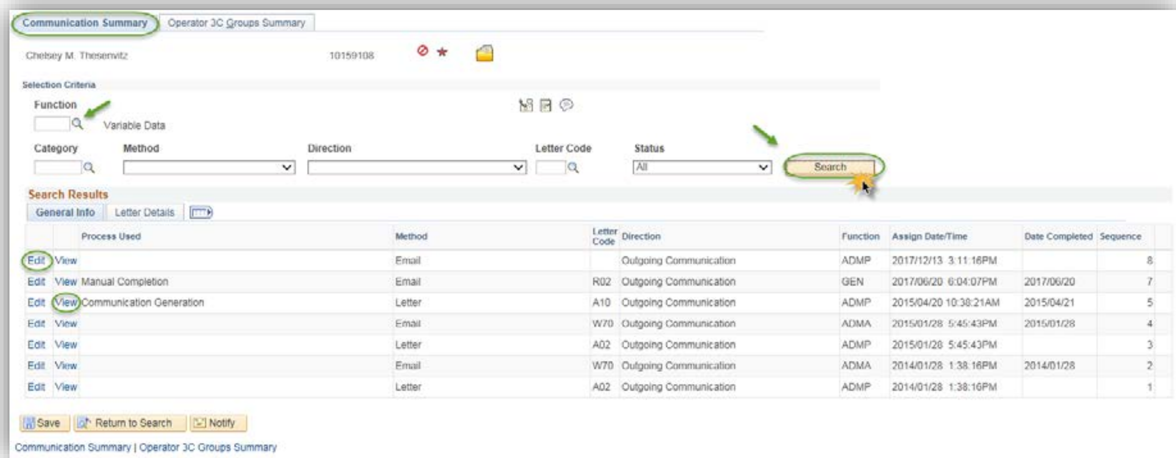
This indicates the reason for an unsuccessful communication; for example Returned Mail would indicate a letter has been returned. The Reason drop down list only displays if the Unsuccessful Communication checkbox is selected.

Communication Summary

A summary of all pending communications to be sent or printed for a student can be viewed on the Communication Summary page.

Navigation:

► Breadcrumbs
Campus Community > Communications > Person Communications > Communication Summary



✧ *Notes:*

►The search function can be performed with no values entered. The search results will display a list of <u>all</u> communications for the student. Defining the search by entering values limits the search results.

►Variable Data
This link is only available when the Function has been selected. This page allows you to search for specific variable data related to the Administrative Function selected.

This link will not display if no variable data is required or allowed for this Administrative Function.

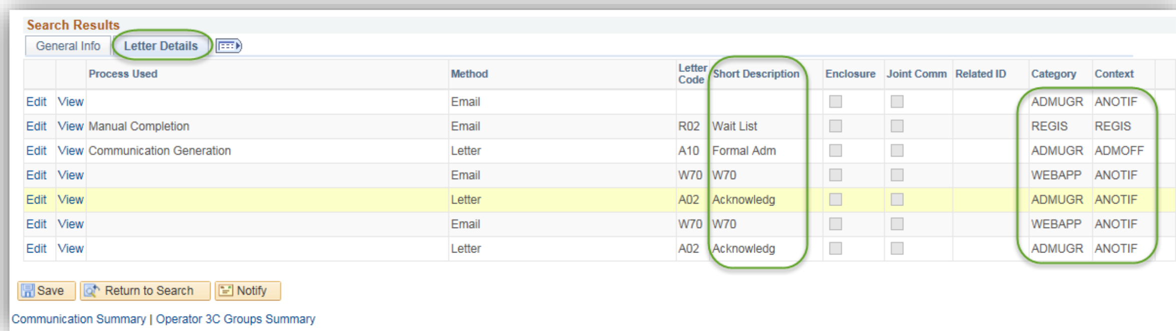
Search Results – General Info

This area of the page displays the Search Results general information; Method, Letter Code, Direction, Function, the date and time the communication was assigned. The Date Completed field will display the date the communication was generated. The Sequence displays the order in which the communications were sent.

The ability to Edit or View is based on individual access permissions. The Edit link transfers back to the Communication Management component where the information can be edited. The View link transfers to the Communication Details component. Information on this page cannot be edited.

Search Results – Letter Details

This area of the page displays additional details such as the Communication Short Description, Category and Context.

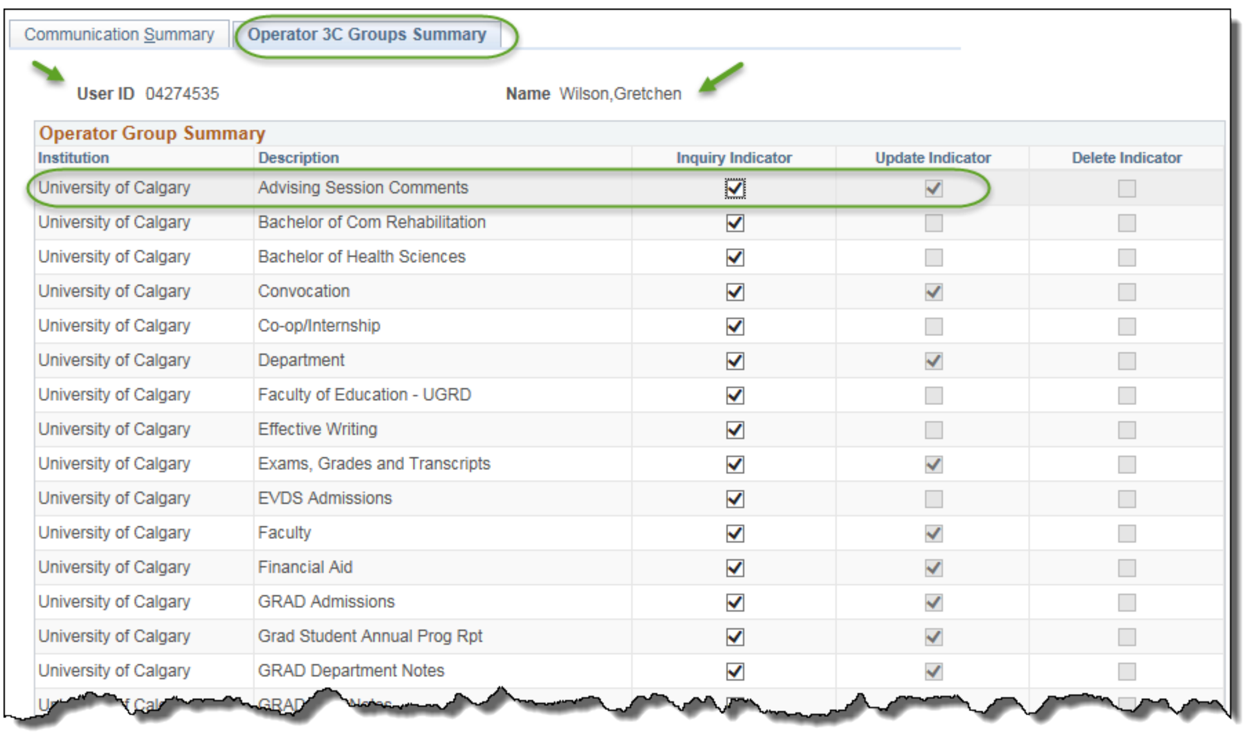

Search Results
General Info | Letter Details

		Process Used	Method	Letter Code	Short Description	Enclosure	Joint Comm	Related ID	Category	Context
Edit	View		Email			☐	☐		ADMUGR	ANOTIF
Edit	View	Manual Completion	Email	R02	Wait List	☐	☐		REGIS	REGIS
Edit	View	Communication Generation	Letter	A10	Formal Adm	☐	☐		ADMUGR	ADMOFF
Edit	View		Email	W70	W70	☐	☐		WEBAPP	ANOTIF
Edit	View		Letter	A02	Acknowledg	☐	☐		ADMUGR	ANOTIF
Edit	View		Email	W70	W70	☐	☐		WEBAPP	ANOTIF
Edit	View		Letter	A02	Acknowledg	☐	☐		ADMUGR	ANOTIF

Save | Return to Search | Notify
Communication Summary | Operator 3C Groups Summary

Operator 3C Groups Summary

The Operator 3C Groups Summary page is used to view the 3C groups to which the user has been assigned. This is an example of the user having the ability to view (Inquiry Indicator) and edit (Update Indicator) Advising Session Comments.


Communication Summary | Operator 3C Groups Summary

User ID 04274535 Name Wilson,Gretchen

Operator Group Summary

Institution	Description	Inquiry Indicator	Update Indicator	Delete Indicator
University of Calgary	Advising Session Comments	☑	☑	☐
University of Calgary	Bachelor of Com Rehabilitation	☑	☐	☐
University of Calgary	Bachelor of Health Sciences	☑	☐	☐
University of Calgary	Convocation	☑	☑	☐
University of Calgary	Co-op/Internship	☑	☐	☐
University of Calgary	Department	☑	☑	☐
University of Calgary	Faculty of Education - UGRD	☑	☐	☐
University of Calgary	Effective Writing	☑	☐	☐
University of Calgary	Exams, Grades and Transcripts	☑	☑	☐
University of Calgary	EVDS Admissions	☑	☐	☐
University of Calgary	Faculty	☑	☑	☐
University of Calgary	Financial Aid	☑	☑	☐
University of Calgary	GRAD Admissions	☑	☑	☐
University of Calgary	Grad Student Annual Prog Rpt	☑	☑	☐
University of Calgary	GRAD Department Notes	☑	☑	☐

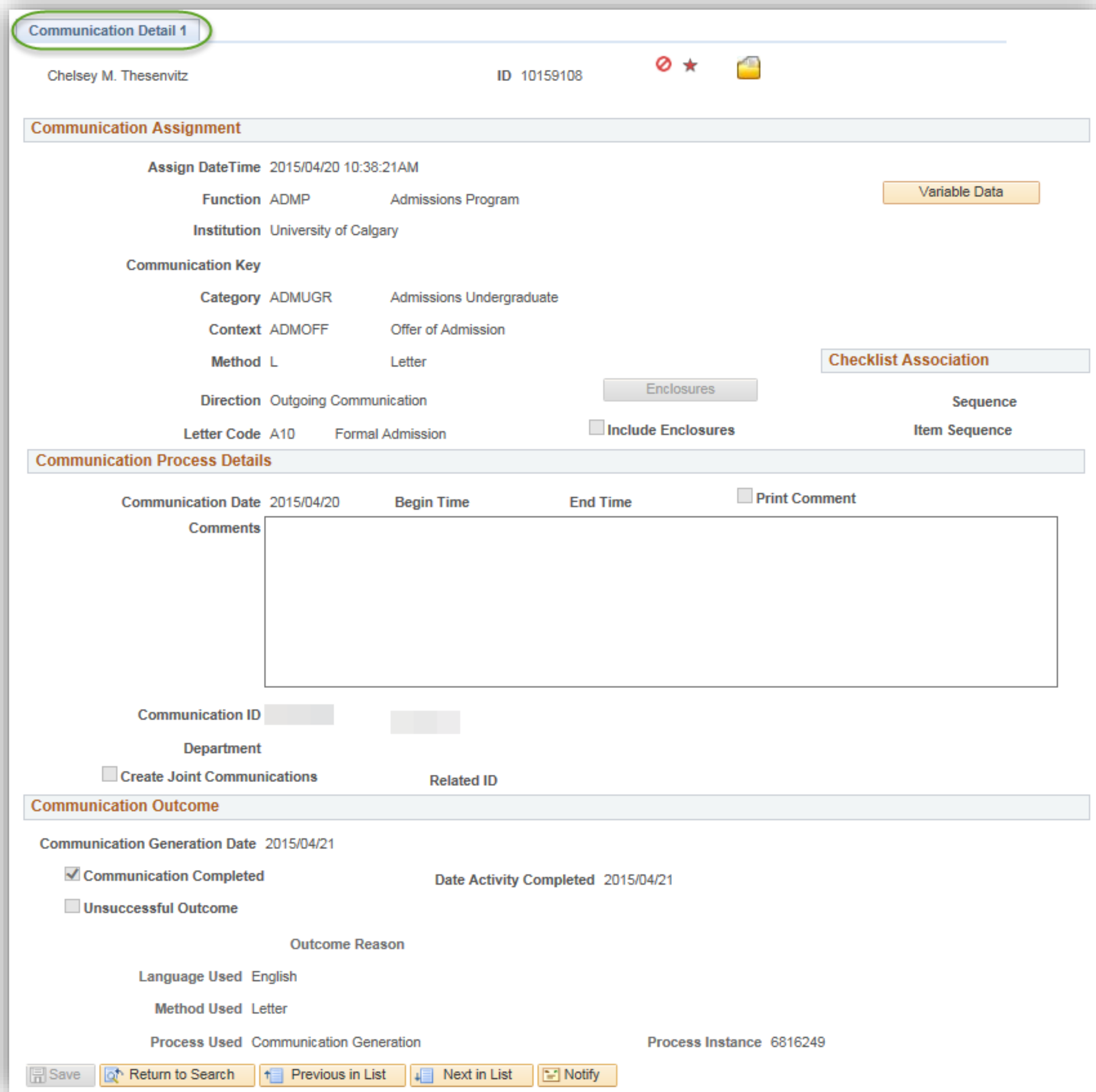
Communication Detail

The Communication Detail 1 page is view-only of the Communication Management 1 and 2 pages previously mentioned. You cannot enter or edit data on the detail pages.

This page can be accessed using the navigation path below or by clicking the 'View' link on the Communication Summary screen (the 'View' link on the Communication Summary screen is based on individual security permissions).

Navigation:

► Breadcrumbs
Campus Community > Communications > Person Communications > Communication Detail



Checklist Management - Person

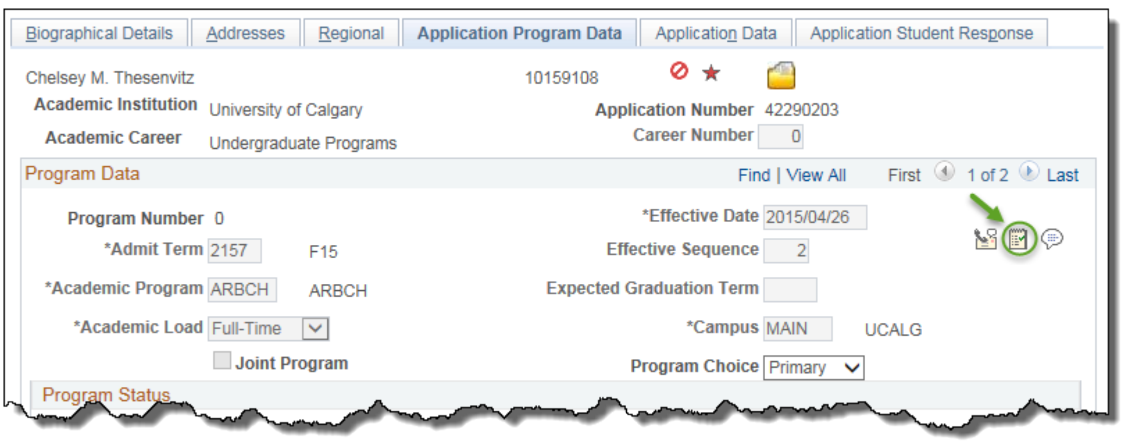
Checklists can be used to assign "To Do" lists for applicants by authorized staff. A user can select the appropriate checklist code which is set up to have one or more checklist items associated with it. Additional checklist items can be added or removed from a record as required.

Navigation:

► Breadcrumbs
Campus Community > Checklists > Persons Checklists > Checklist Management - Person

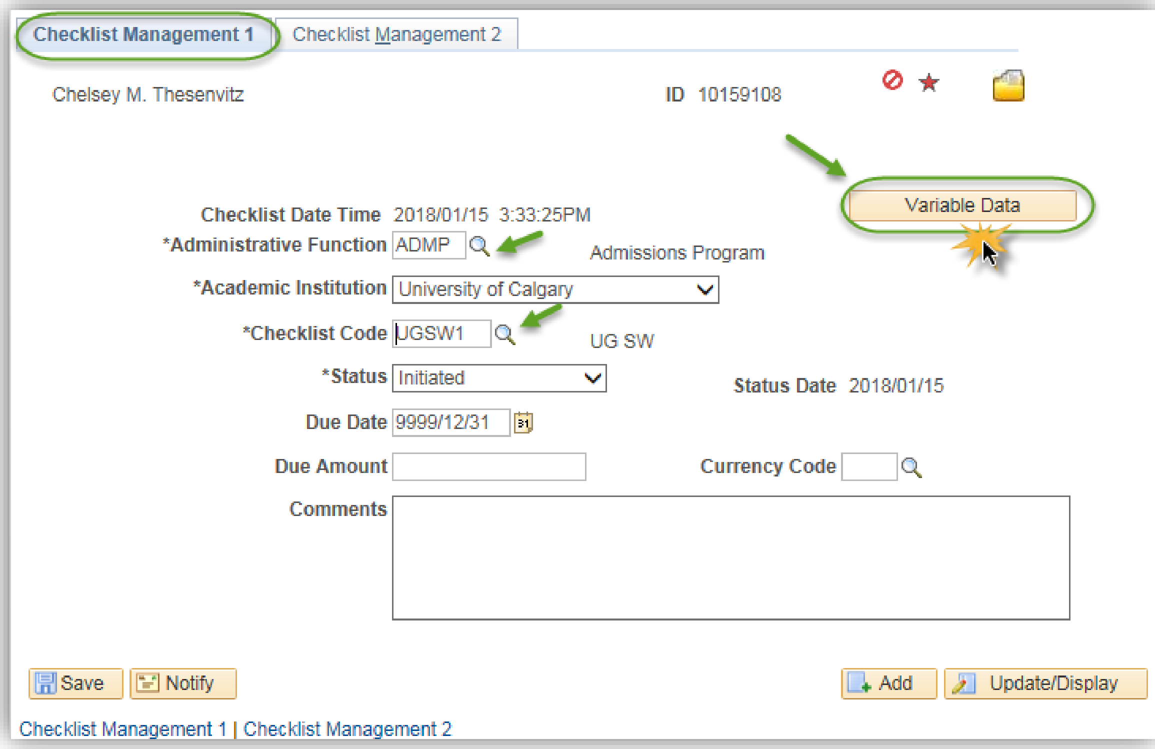
The Checklist icon can be used to transfer to the Checklist component. The component will open in a new window.

Important note: The Checklist icon is designed to facilitate adding new checklists. To review checklists already assigned, you must access the Checklist Management – Person component from the navigation menu (*refer to the navigation menu above*) which opens the component Search page.



Checklist Management 1

The ‘Checklist Management 1’ page allows users to select a ‘Checklist Code’ to generate a group of items that an applicant is required to submit in support of their Application for Admission.



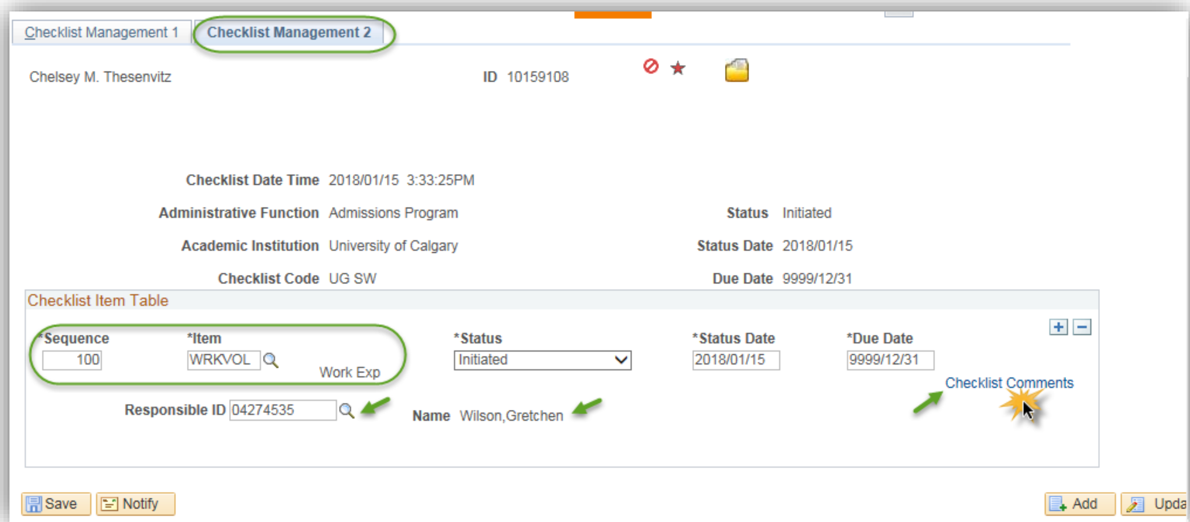
✧ ***Notes:***

►Variable Data

This information ties a checklist to a specific student application.

Checklist Management 2

The 'Checklist Management 2' page lists the detail of the individual Checklist Items. This page also enables users to update, add or remove individual 'Checklist Items'.



✧ ***Notes:***

►Sequence

Checklist items are listed sequentially. This is the number of the checklist item in the list of checklist items. The system automatically enters the next sequential number for each checklist item added. The Sequence number can be manually overridden to reorder the list of items for this checklist.

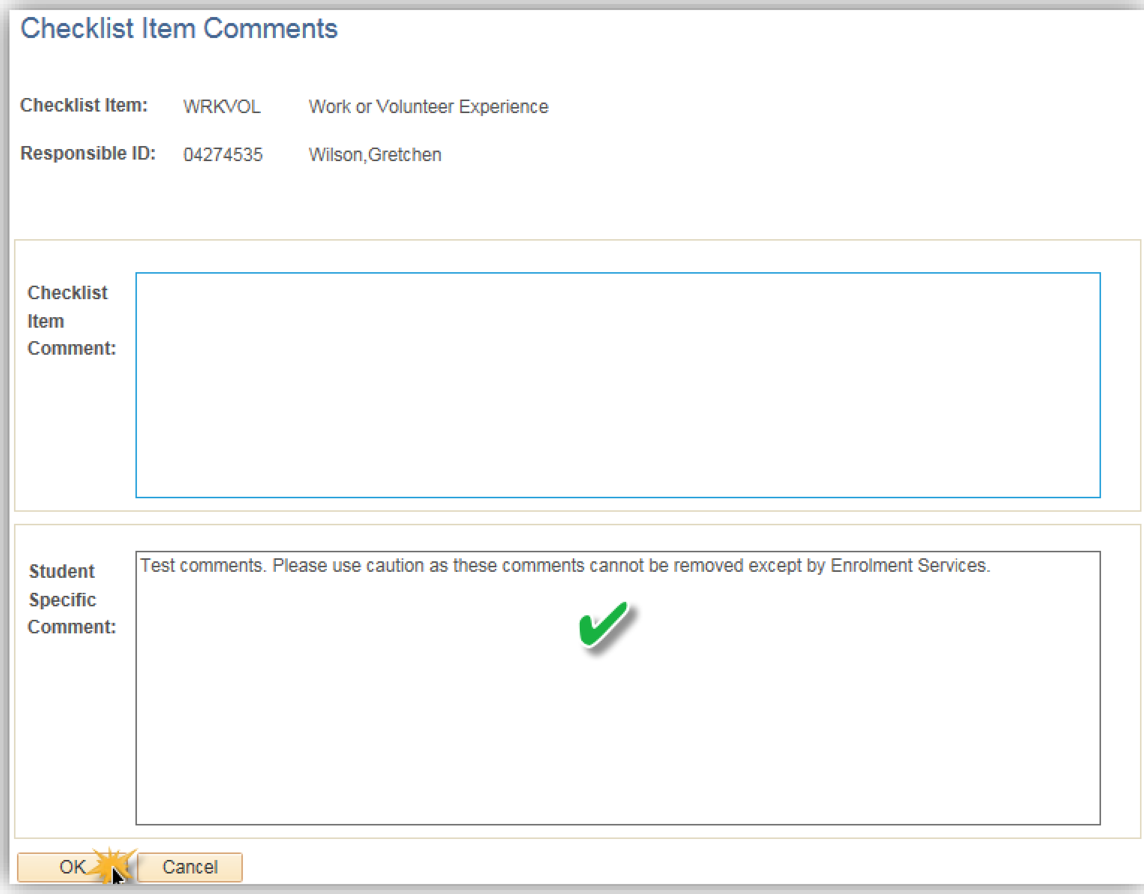
►Responsible ID and Name

The system defaults to the user who initiated the Checklist.

►Checklist Comments

In **SA** comments are added to an applicant's file that is associated with additional requirements (checklist items) or in some cases a generic additional requirement item is added with the detail described in comment form. This comment is displayed to applicants when they select individual checklist items on the ***Self-Service 'To Do'*** page. However, there are instances when another comment must be added, which is specific to the individual applicant.

The Checklist Comments link allows you to enter a supplementary comment specific to the student.



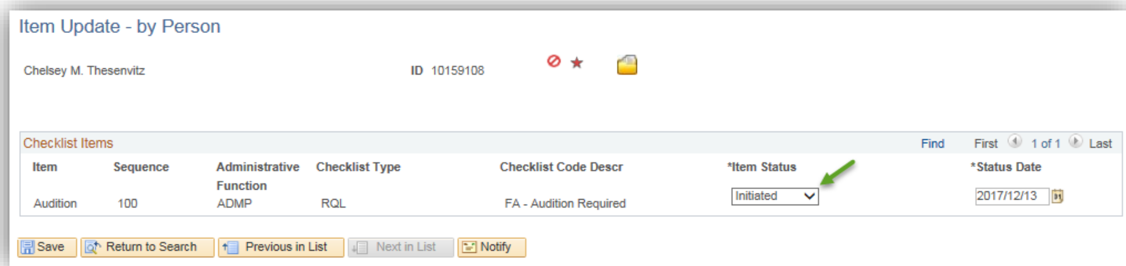
Note: Checklist items can also be updated on the 'Checklist Item Update – by Person' page.

Item Update - by Person

Checklist items can also be updated on the 'Checklist Item Update – by Person' page. Only those Checklist Items in 'initiated' status will display.

Navigation:

► Breadcrumbs
Campus Community > Checklists > Persons Checklists > Item Update – by Person

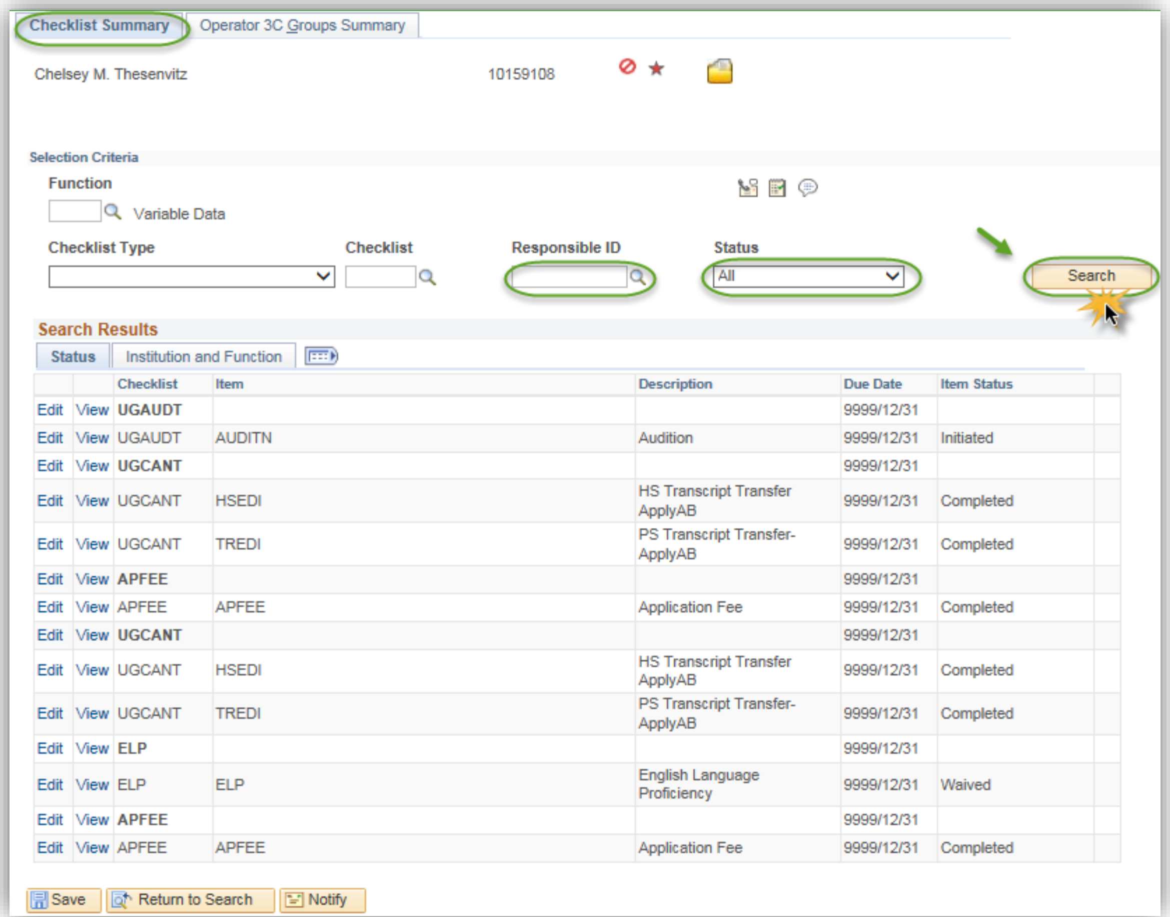


Person Checklist Summary

A Summary View of Checklist data is displayed on the Checklist Summary Page.

Navigation:

► Breadcrumbs
Campus Community > Checklists > Person Checklist > Person Checklist Summary



✧ ***Notes:***

►Responsible ID

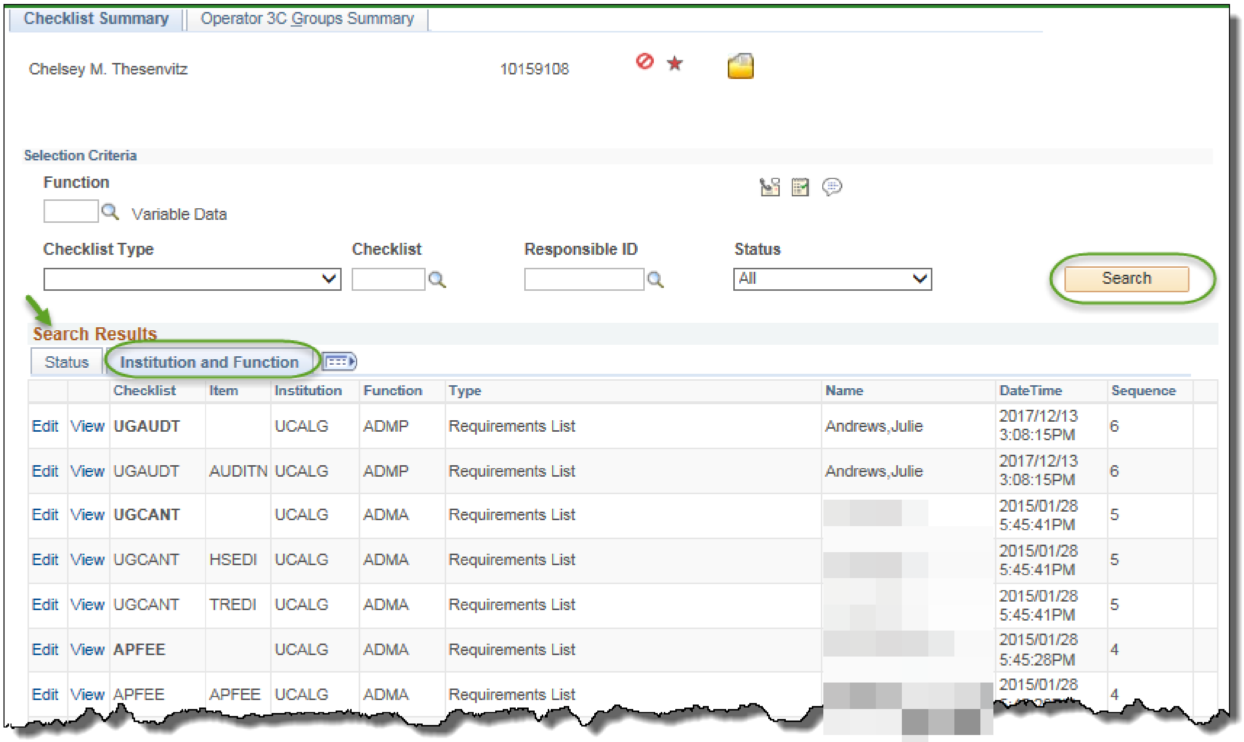
The Responsible ID defaults the users ID. The Responsible ID can be deleted to display 'All' Checklist Items.

Search Results - Code Item Status

This area of the page displays the checklist code, checklist item, description, due date and item status. Similar to the Communication Summary, the ability to "Edit" or "View" the comment is based on individual security permissions.

Search Results - Institution and Function

The "Institution and Function" tab on this page allows you to track various attributes associated with the individual items (i.e. item type, date/time item was added, name of who added the item, etc.).

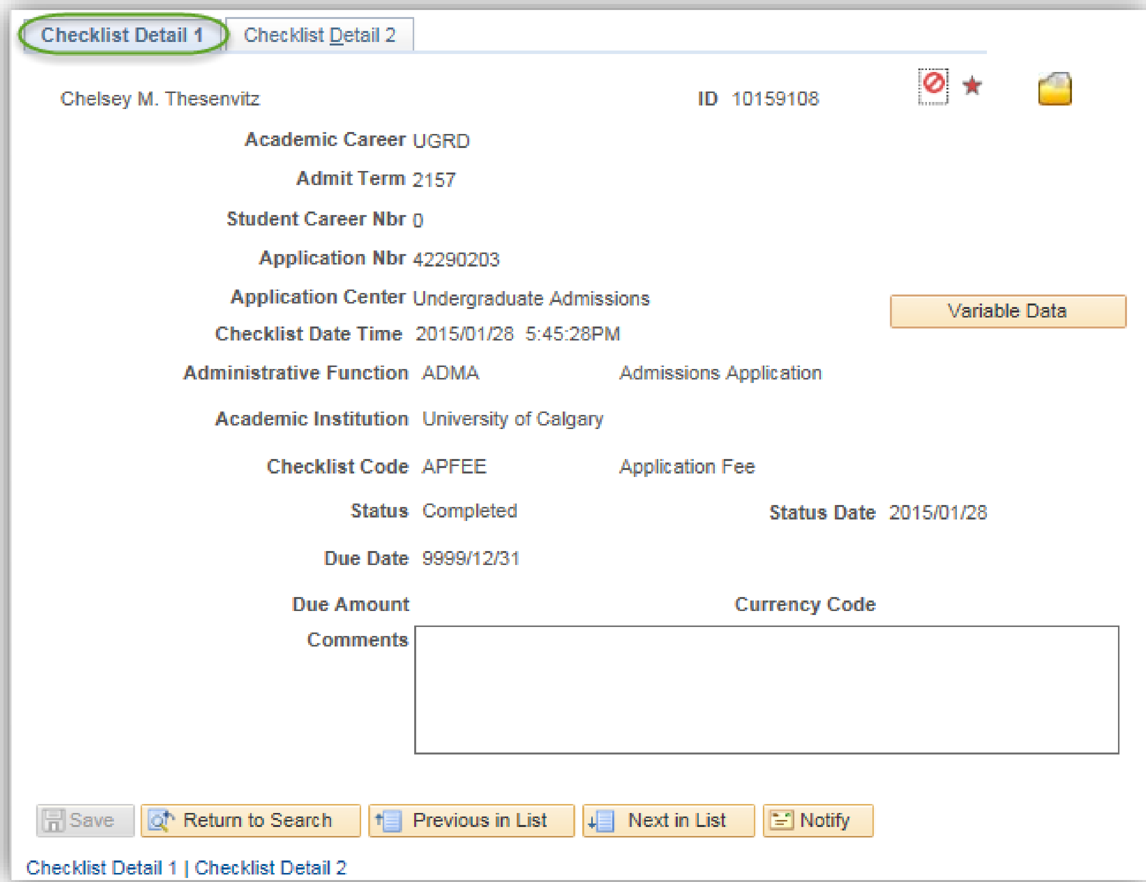

Checklist Summary
Operator 3C Groups Summary
Chelsey M. Thesenvitz
10159108
Selection Criteria
Function
Variable Data
Checklist Type
Checklist
Responsible ID
Status
All
Search
Search Results
Status
Institution and Function
Checklist | Item | Institution | Function | Type | Name | DateTime | Sequence
Edit View UGAUDT UCALG ADMP Requirements List Andrews,Julie 2017/12/13 3:08:15PM 6
Edit View UGAUDT AUDITN UCALG ADMP Requirements List Andrews,Julie 2017/12/13 3:08:15PM 6
Edit View UGCANT UCALG ADMA Requirements List 2015/01/28 5:45:41PM 5
Edit View UGCANT HSEDI UCALG ADMA Requirements List 2015/01/28 5:45:41PM 5
Edit View UGCANT TREDI UCALG ADMA Requirements List 2015/01/28 5:45:41PM 5
Edit View APFEE UCALG ADMA Requirements List 2015/01/28 5:45:28PM 4
Edit View APFEE APFEE UCALG ADMA Requirements List 2015/01/28 4

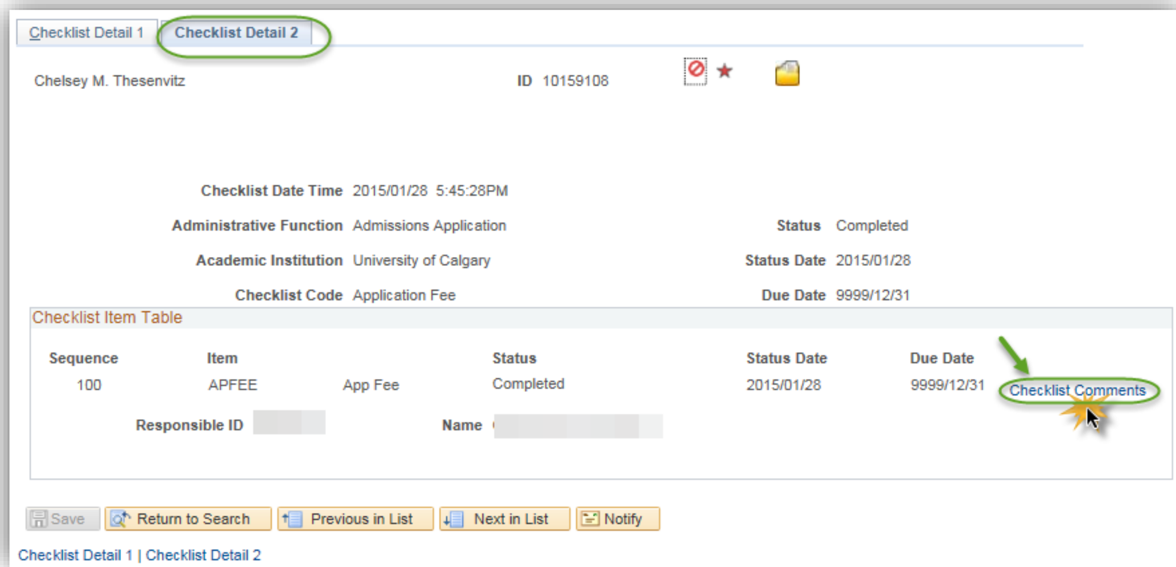
Checklist Detail

Similar to Communications Detail Checklist Detail 1 & 2 provide "view only" versions of Checklist Management 1 & 2. Checklist items cannot be updated, assigned or removed from these components.

Navigation:

► Breadcrumbs
Campus Community > Checklists > Person Checklist > Person Checklist Detail





✧ ***Notes:***

►Checklist Comments

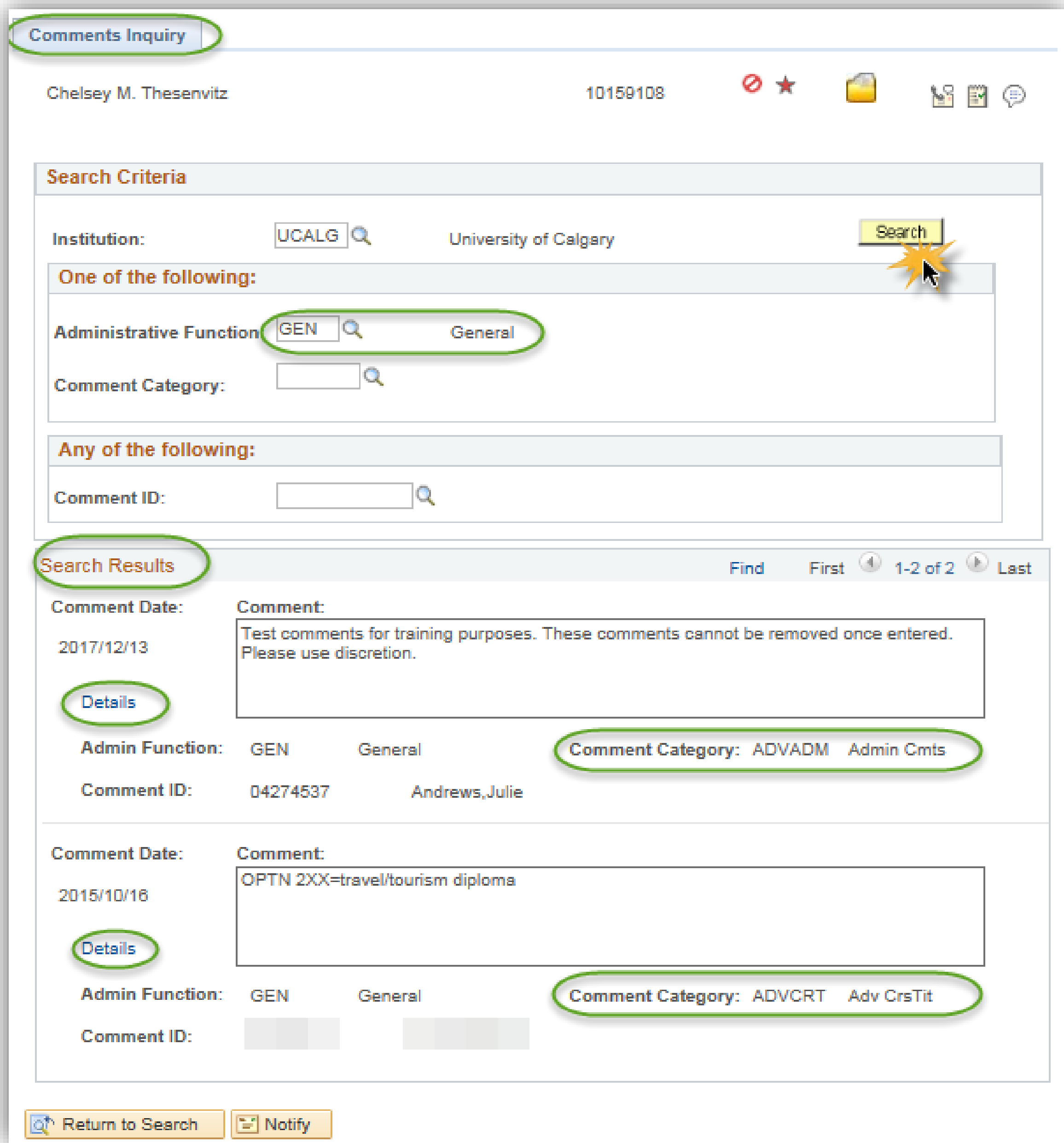
Click the Checklist Comments link to view the comment/s associated with the Checklist Item.

Comment Inquiry

The Comment Inquiry component can be used to view comments for a student.

Navigation:

► Breadcrumbs
Campus Community > Comments > Comments – Person > Comment Inquiry



✧ ***Notes:***

►**Search Criteria**
Either the Administrative Function or Comment Category field must be populated in order to search for comments that have been recorded on the student's record. Only one of these fields may be populated.

►**Search Results**
The Search Results display the Comment, Admin Function, Comment Category, Comment ID and the person responsible for adding the comment to the student's record.

Person Comment Entry

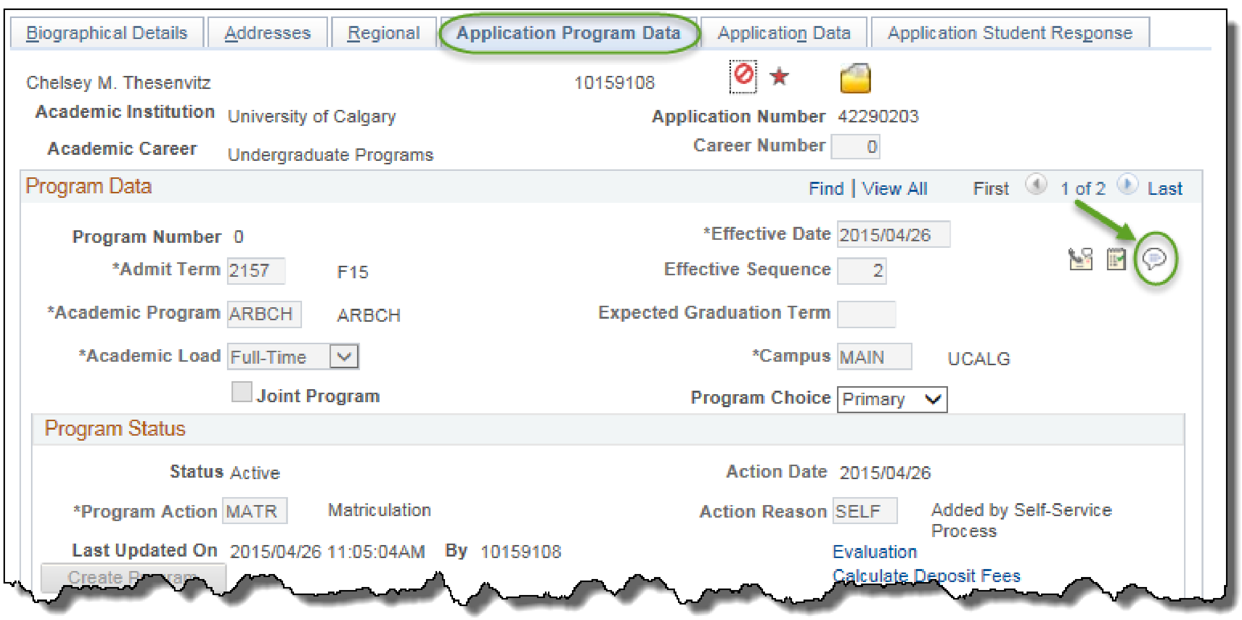
Defined comments can be assigned to or removed from a student's file as required by authorized personnel.

Navigation:

► Breadcrumbs
Campus Community > Comments > Comments – Person > Person Comment Entry

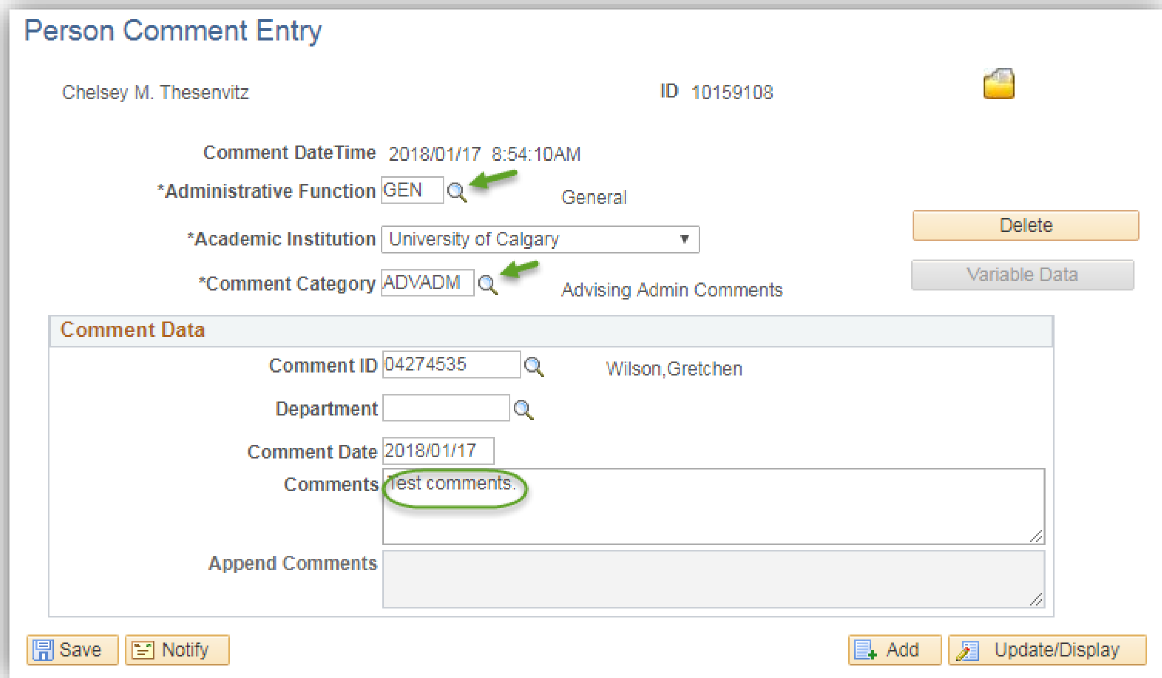
The comments icon can be used to transfer to Comments. As with Communications and Checklists the icon opens in a new window.

Important Note: The Comment icon is designed to facilitate adding new comments. To review comments previously assigned, access this component using the navigation menu (*refer to the navigation menu above*).which opens the component search page in a new window.



Person Comment Entry

A comment regarding a student can be entered on the Person Comment Entry page from Add a New Value.



✧ ***Notes:***

►Administrative Function

Select the applicable Administrative Function (e.g. GEN General) that indicates which type of comment is being entered.

►Comment Category

Select the applicable Comment Category based on the Administrative Function selected (e.g. ADVADM Advising Admin Comments.

►Variable Data

This button is used to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function.

If you transferred to this page directly from a functional area, the variable data will also transfer.

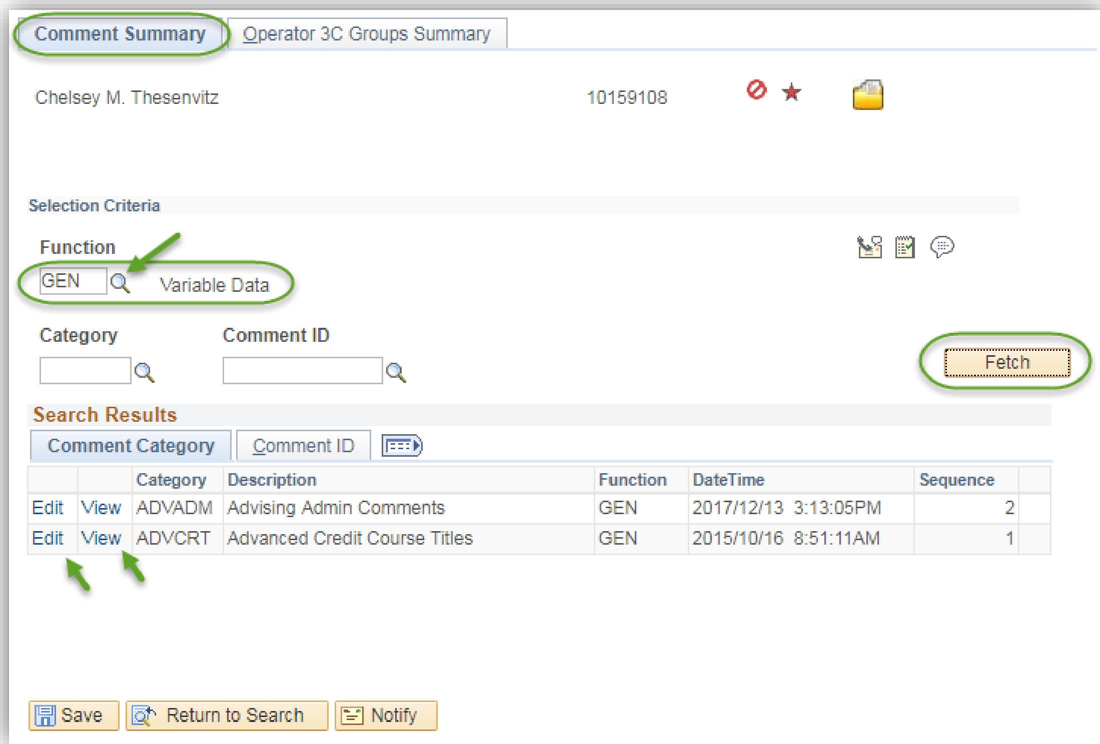
If no variable data is required or allowed for the specified administrative function, the Variable Data button is unavailable and no information is transferred from the functional area.

Person Comment Summary

A summary view of comments for an individual is displayed on the Comments Summary page.

Navigation:

► Breadcrumbs
Campus Community > Comments > Comments – Person > Person Comment Summary



Search Results - Comment Category

The Comment Category displays the Category, Description, Function, Date/Time and Sequence of the Comment.

►Edit or View

Similar to the Communication and Checklist Summary, the ability to "Edit" or "View" the comment is based on the security level the user has.

Search Results - Comment ID

The Comment ID tab is used to display the name of the individual who entered the comment(s).

Search Results

Comment Category | Comment ID

		Category	Comment ID	Name
Edit	View	ADVADM	04274537	Andrews,Julie
Edit	View	ADVCRT	10019110	

Operator 3C Groups Summary

Similar to the Communications and Checklist Summary Operator 3C Groups Summary pages, the Comments Summary Operator 3C Groups Summary displays the user 3C groups to which access has been granted.

Communication Summary | Operator 3C Groups Summary

User ID 04274535 **Name** Wilson,Gretchen

Operator Group Summary

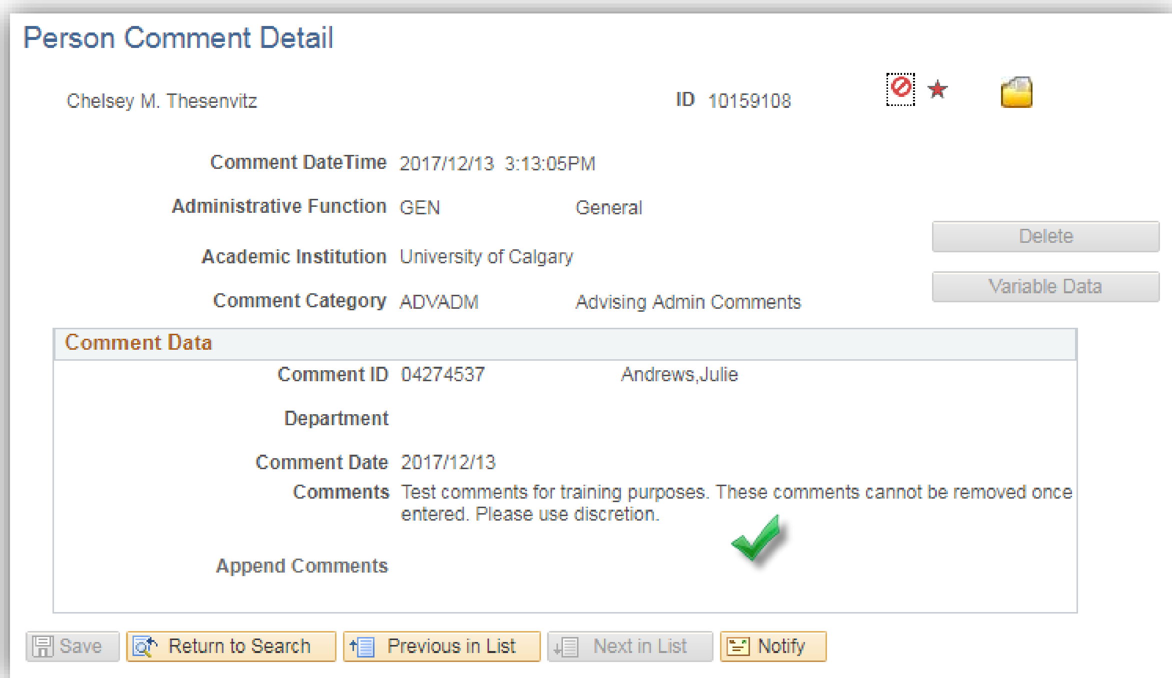
Institution	Description	Inquiry Indicator	Update Indicator	Delete Indicator
University of Calgary	Advising Session Comments	☑	☑	☐
University of Calgary	Bachelor of Com Rehabilitation	☑	☐	☐
University of Calgary	Bachelor of Health Sciences	☑	☐	☐
University of Calgary	Convocation	☑	☑	☐
University of Calgary	Co-op/Internship	☑	☐	☐
University of Calgary	Department	☑	☑	☐
University of Calgary	Faculty of Education - UGRD	☑	☐	☐
University of Calgary	Effective Writing	☑	☐	☐
University of Calgary	Exams, Grades and Transcripts	☑	☑	☐
University of Calgary	EVDS Admissions	☑	☐	☐
University of Calgary	Faculty	☑	☑	☐
University of Calgary	Financial Aid	☑	☑	☐
University of Calgary	GRAD Admissions	☑	☑	☐
University of Calgary	Grad Student Annual Prog Rpt	☑	☑	☐
University of Calgary	GRAD Department Notes	☑	☑	☐

Person Comment Detail

This is a “view only” version of Person Comment Entry. Information displayed on this page cannot be modified.

Navigation:

► Breadcrumbs
Campus Community > Comments > Comments – Person > Person Comment Detail



Service Indicators

PeopleSoft Service Indicators provide or limit access to services for an individual. Negative Service Indicators will be used to prevent an individual from receiving certain services. Positive Service Indicators or Alerts will be used to designate special services be provided.

The system also maintains an audit history that indicates who applied which service indictors to which individuals, including add, change, and delete history.

Note: The ability to create, maintain and release Service Indicators is based on your security and provisioning within the system.

The following components provide an overview of Service Indicators:

1) **Define Service Indicators**
   Define Service Indicators discusses admission alerts and various withholds that have been created in PeopleSoft as positive and negative Service Indicators.

2) **Assign/Remove Service Indicator Data (Manual)**
   This section demonstrates the manual process for adding or removing Service Indicator data.

3) **Assign/Remove Service Indicator Data (Batch)]**
   Assign/Remove Service Indicator Data (Batch)] discusses the automated batch process developed to assign or remove Service Indicator data.

4) **View Service Indicator Data From Other Pages**
   View Service Indicator Data from Other Pages discusses how to Service Indicator data can be viewed from other pages.

5) **Active Service Indicators Inquiry**
   This inquiry may be used to view active Service Indicators only.

6) **Service Indicator Audit History**
   This inquiry is used to view the history of active and non-active Service Indicators.

Define Service Indicators

Negative Service Impacts

At the University of Calgary the negative service impacts are:

- Prevent all enrollment activity
- Prevent all enrollment additions/allow drops
- Block release of official transcripts

All Services Hold Service Indicators

Several 'withhold' codes have also been created to prevent a student from registering and/or receiving transcripts where certain conditions exist. These restrictions remain on the student's record and are enforced regardless of academic program and remain in effect until such time as the negative Service Indicators are removed.

Withholds which fall into this category include, but are not limited to:

- RO-A (Admission documents)
- RO-P (Parking)
- RO-H (Housing)
- GS-OD (Outstanding docs)
- RO-F (Fees)
- GS-NR (No progress report)

Withholds which automatically prevent all enrolment and/or prevent the release of transcripts have been configured as PeopleSoft negative Service Indicators.

Course Deficiency Service Indicators

Faculty Specific Course Deficiency Negative Service Indicators have been created. These negative Service Indicators prevent enrollment for students who are conditionally admitted but are deficient in one or more course requirements.

When an applicant is admitted to an academic program with a course deficiency, staff can manually add a future-dated Course Deficiency negative Service Indicator/reason with the effective date set to a date one year from the time of admission.

If an applicant with a Course Deficiency negative Service Indicator subsequently applies for and is admitted to a different program, the existing course deficiency negative Service Indicator will continue to prevent enrolment. When the student is accepted into the new program, the new Faculty will terminate the program for which the course deficiency was not cleared by adding a 'Discontinue' program action on the Student Program/Plan component. Process staff will also be required to manually remove the Course Deficiency negative Service Indicator.

Once the Course Deficiency Service Indicator is removed the student is allowed to register in courses (assuming that they do not have any other negative Service Indicators which prevent enrolment (e.g. parking fines, etc.) and have met all other registration criteria (e.g. date is on or after their enrolment appointment, etc.)

Students have the ability to view their "holds" and will be required to advise Faculty if their record indicates a course deficiency hold in error (for example if the hold has been cleared or applies to a former program). Staff can then follow up with the appropriate action to remove the negative Service Indicator.

Effective Writing Service Indicators

The Effective Writing Service Indicator prevents enrollment for students who have not met the Effective Writing requirement by the stated deadline. This Service Indicator can be assigned or removed through a custom automated process.

Admission Office Alerts

The Undergraduate Admission Office has a requirement to attach messages to an applicant record which alert staff to special processing which has to be done when information is received (eg. documents) or, at the time of evaluation.

Alert messages have been configured in PeopleSoft as Positive Service Indicators. For example, the Aboriginal Policy Indicator is automatically assigned based on the data entered on the Admissions form by the applicant. Baccalaureate Program graduates' flag will be mapped as alerts. The Web Application for Admission Interface will automatically add these Service Indicators as appropriate.

Deceased Service Indicator

The word *DECEASED* displays at the top of pages about individuals to whom this Service Indicator is assigned.

Positive and Negative Service Indicators can be removed manually or by using the Assign/Remove Service Indicators process outlined in this reference guide.

Service Indicator Data

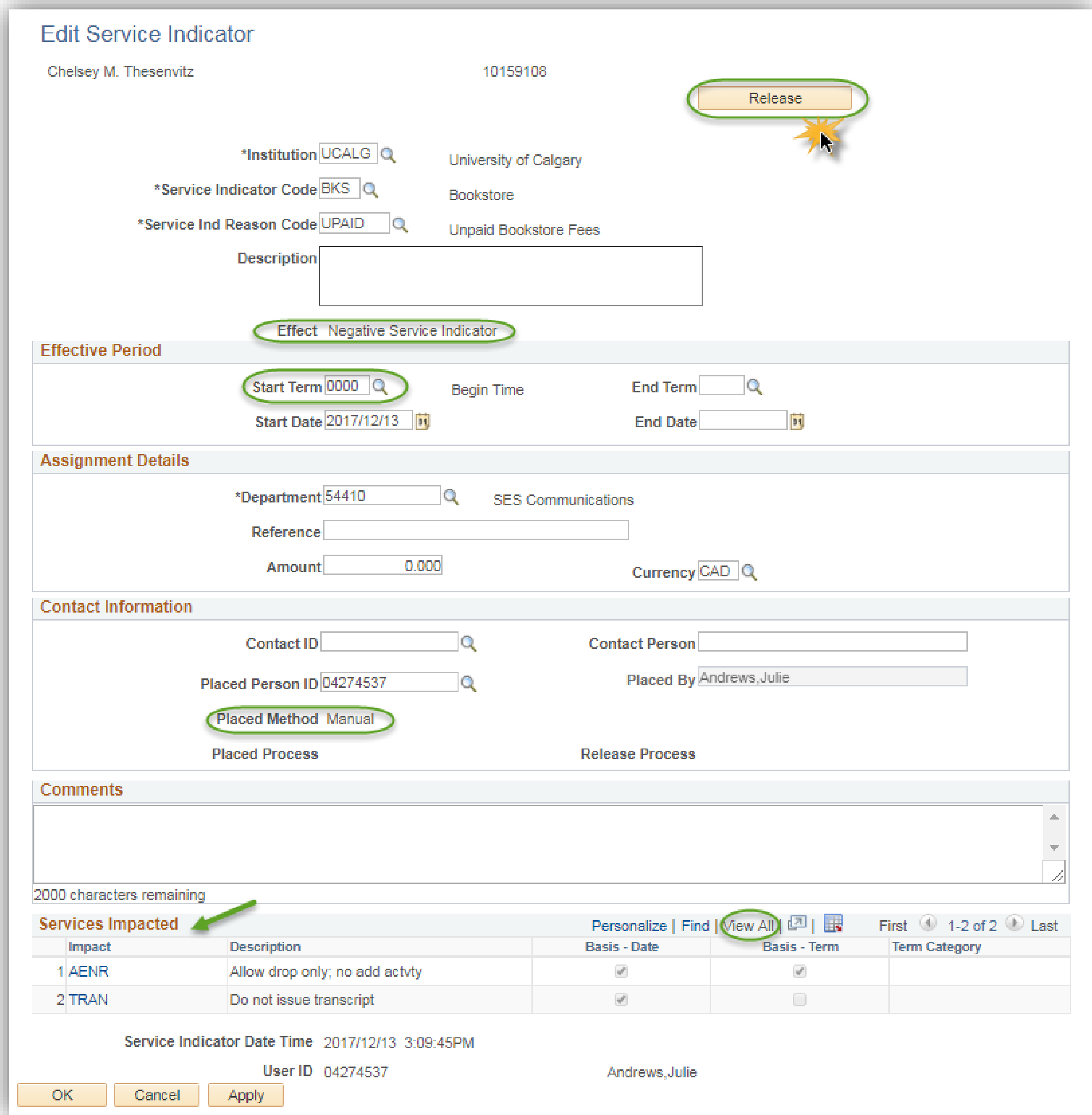
This component demonstrates the manual process for assigning or removing Service Indicator data.

Navigation:

► Breadcrumbs
Campus Community > Service Indicators (Student) > Manage Service Indicators

Manage Service Indicators

The Edit Service Indicators Page is used to assign or remove a Service Indicator.



✧ ***Notes:***

►**Positive Service Indicator -** ★
The Positive Service Indicator can be used to view the service privileges associated with the student's record.

►**Negative Service Indicator -** ⊘
The Negative Service Indicator can be used to view the service restrictions associated with the student's record. The indicator fields will be locked out so it cannot be edited.

►**Effective Period**
The Start Term indicates the term the Service Indicator applies to.
Note: The applicable Term <u>must</u> be entered.

►**Release**
According to individual permissions service indicators can be Released.

►**Placed Method**
Service Indicators can be added through an automated process or manually. This displays which process was used to add the Service Indicator.

►**Placed Process**
The system displays the automated process used to add the Service Indicator to the student's record.

►The View All link allows the user to view all indicators on the record.

Add/Remove Service Indicator Data *(Batch)*

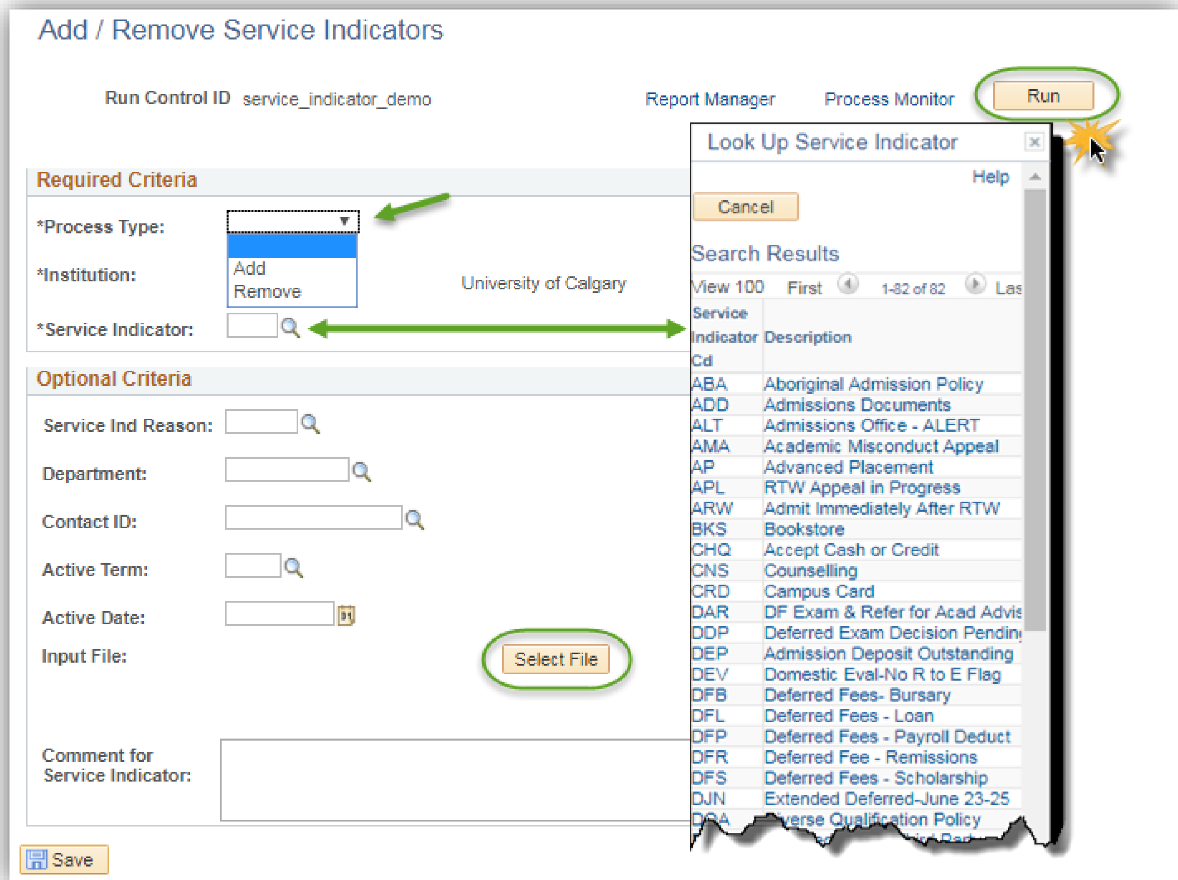
A custom process has been developed which allows authorized users to add or remove Service Indicators for groups of students as part of a batch process; for example where the Effective Writing requirement has not been met by the specified deadline.

Navigation:

► Breadcrumbs
Campus Community > Service Indicators (Student) > Add/Remove Service Indicators

Add/Remove Service Indicators

This page is used to enter criteria to run the automated batch process for assigning and removing Service Indicators.



✧ ***Notes:***

►**Required Criteria**
Use this section of the page to specify the Process Type (Add or Remove) and Service Indicator.
►**Optional Criteria**
Additional information such as the Service Ind Reason, Department, Contact ID, Active Term and Active Date may be entered here.

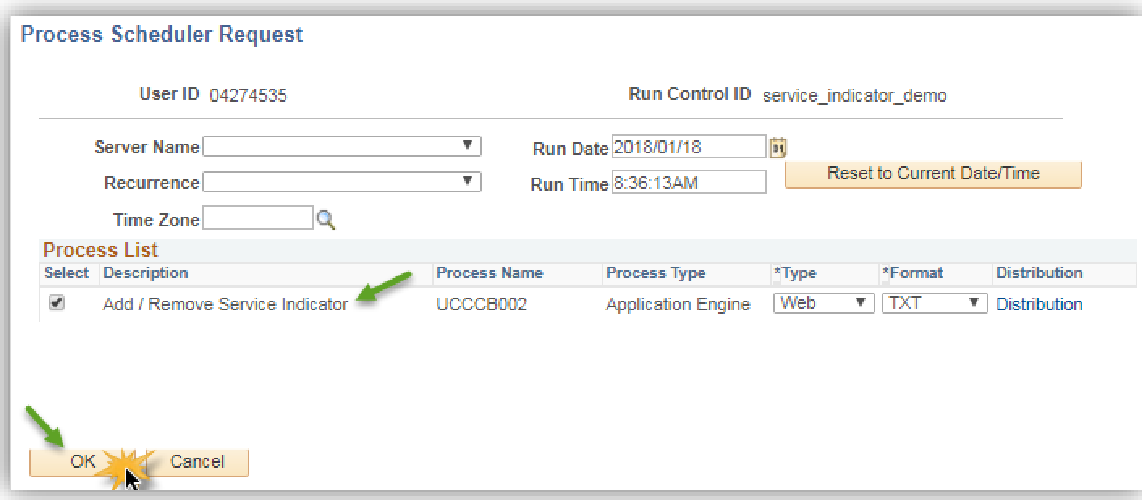
Note:
When 'adding' Service Indicators the Service Indicator Reason, Department, Active Term and Active Date are 'required' fields.

When 'removing' Service Indicators, the Active Date field in the Optional Criteria section is no longer available.

►Select File
The Select File button is used to upload the file containing the student ID numbers which the Service Indicator is 'added to' or 'removed from'. This file is generated by authorized staff who run a query on the data base based on specified selection criteria to produce this file of student ID numbers. The file must be saved as .txt format.

►Run
The Run button is used to initiate the process.

Important Note:
Running this process is similar to the Extract Postal/Email Address process previously discussed in this document.



The Output report indicates the number of records which had the Service Indicator added or removed.

The report also indicates the number of "audit records' adjusted. You can confirm the Service Indicator has been 'added' or 'removed' by viewing the Service Indicator Audit component. The Service Indicator Audit component can be accessed using the navigation path Campus Community>Service Indicators (Student)>Service Indicator Audits ***(see Service Indicator Audits)***.

```
PeopleTools 8.55.15 - Application Engine Server
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All Rights Reserved

PSAESRV started service request at 08.38.40 2018-01-18

Process Development Standards (0,0)

Process Instance       :9819808 (0,0)

Run Date               :2018-01-18 (0,0)

Run Time               :08.38.41.000000 (0,0)

Operator ID            :0427453  (0,0)

Run Control ID         :service_indicator_demo (0,0)

Run control Parameters (0,0)

Institution            :UCALG (0,0)

Process Action         :R (0,0)

Service Ind Code       :BKS

Service Ind Reason     :UPAID

Service Ind Code       :BKS

Deptid                 :

Contact ID             :

Service Ind Act Term :

Service Ind Act Date : (

URL                    :

File Name              :

Comments               :

Control Totals (0,0)

Number of records Updated           :

Number of records inserted          :

Number of audit records inserted    :

Number of records deleted           :

Commit Frequency             : After Program   (0,0)
Application Engine program UCCCB002 ended normally

PSAESRV completed service request at 08.38.43 2018-01-18
```
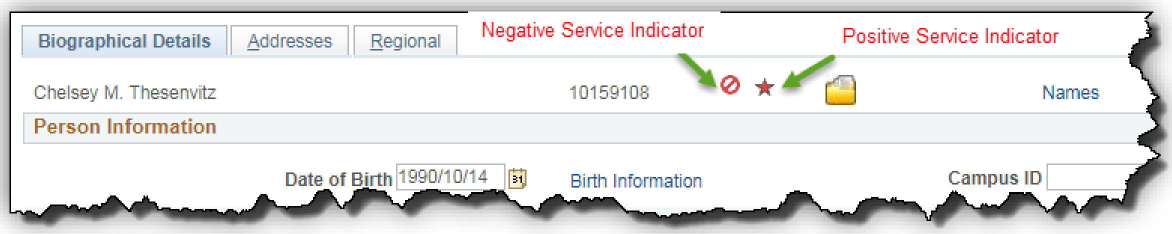
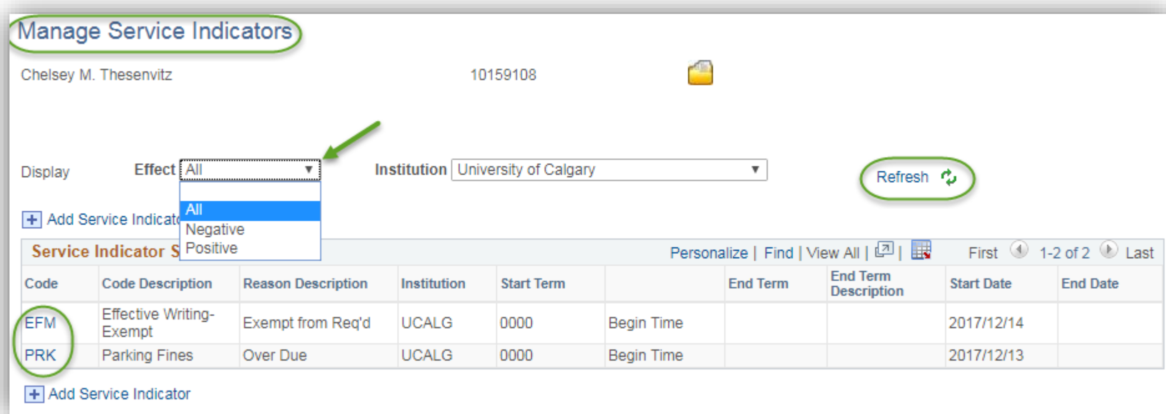

View Service Indicator Data from Other Pages

When a Positive or Negative Service Indicator has been added to the student's record the Service Indicator will display on various pages of the student record. The Service Indicator Detail can be viewed several ways.

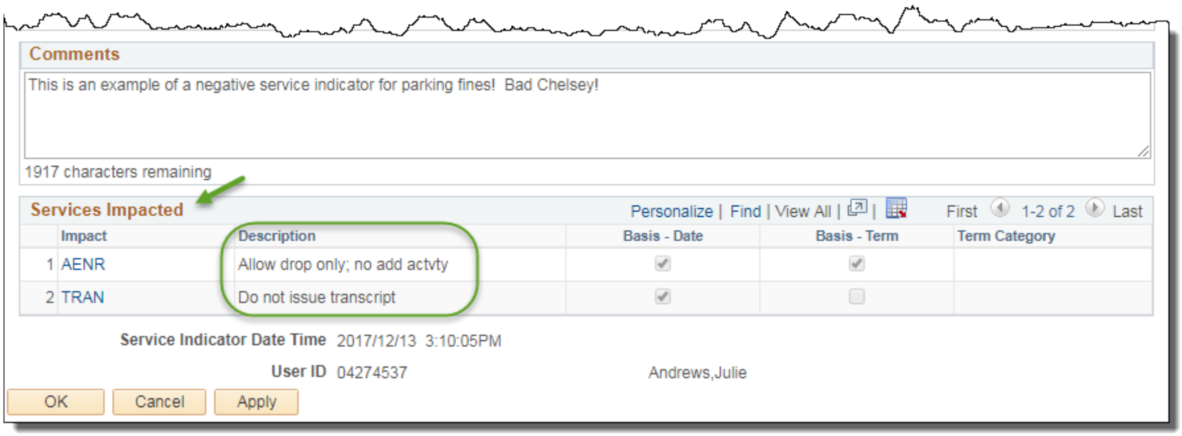
The Service Indicator icons can be used to view the Service Indicator detail for a student. The icon indicates a Negative Service Indicator. The icon indicates a Positive Service Indicator. This example demonstrates how to view the Negative and Positive Service Indicator in Biographical Details.

The Negative or Positive Service Indicator icon (*on any page*) can be used to access the Service Indicators for that student.





The Code link is used to access the Service Indicator details including the associated service impact for the Service Indicator selected.



Similarly, the process outlined above would be used to view the detail for Positive Service Indicators.

Student Services Centre

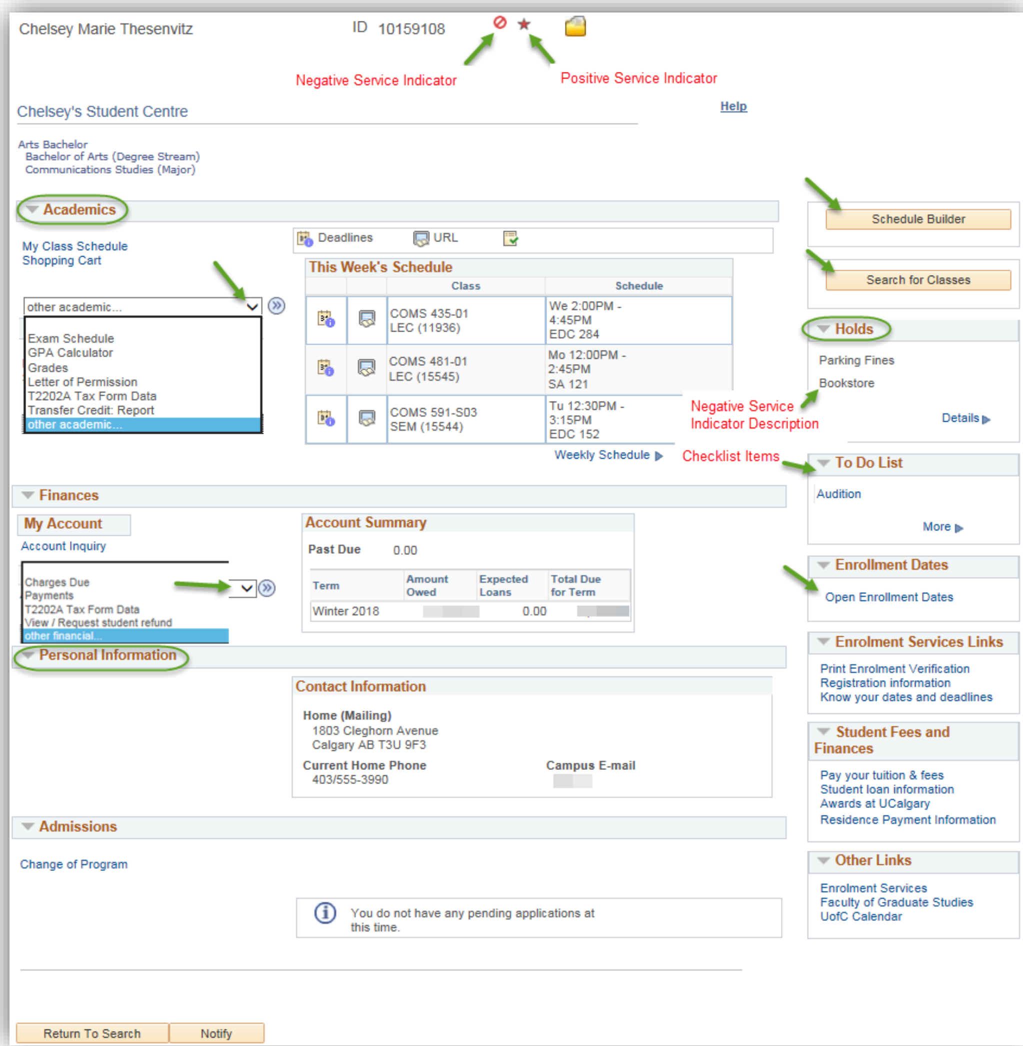
The Student Services Centre provides staff with access to information about the student's record in one location. Staff can view a student's timetable, exam schedule, contact information, etc.

Navigation:

► Breadcrumbs
Campus Community > Student Services Center

The screen shot below displays the main page of the Student Services Centre. This page is essentially identical to the page that students will directly link to from MyUofC.

Important Note: This page is 'view' only; staff cannot perform updates on this screen. Students however will see additional links on their Student Centre and have the ability to update their personal information i.e. Address and Phone.



✧ ***Notes:***

►**Academics**
This section of the Student Services Centre provides 'view' access to the student's Class Schedule, Grades, Exam Schedule, T2202A Tax Form Data and Transfer Credit Report. You can also access the GPA Calculator through the 'other academic' drop down list.

►**Finances**
The Finance section displays an Account Inquiry link where you can view all the financial transactions made between the student and the U of C as well as an Account Summary. The 'other financial' drop down menu can be used to access the student's Account Activity; Charges Due, Payments made as well as access their T2202A tax form data.

►**Personal Information**
The Personal Information section allows you to view the student's demographic data and contact information.

►**Admissions**
The Admissions section displays the status of the student's submitted application (Incomplete, Complete, and Admitted) and allows you to view outstanding items for an application that is incomplete.

►**Schedule Builder**
Schedule Builder is a web-based tool to help students build potential class schedules and potentially register for courses.

►**Search for Classes**
This button can be used to Search for Classes or Browse the Catalog.

►**Holds**
The Holds section allows you to view the negative service indicators attached to a student's record which can prevent them from enrolling in classes or access to academic information i.e. transcripts.

►**To Do List**
The To Do List displays the list of items the student must complete to finalize the admissions process. Checklist items appear on the To Do list.

►**Enrollment Dates**
Once assigned, the Enrollment Appointment Date (the time and day when students can start enrolling for the next semester) can be viewed under Enrollment Dates on the Student Services Centre. The details link provides additional information on the Enrollment Dates.

►**Enrolment Services Links**
Transfers to Enrollment Services web site where staff/students can access information on how to Search for Classes, Error Messages (from Fall registration) and Enrollment Services Forms.

►Student **Fees and Finances Links**
Transfers to Enrollment Services web site where staff/students can view information regarding Payment Options, Award Payouts and Credit Card Information.

►**Other Links**
Other Links include Enrollment Services, Faculty of Graduate Studies and the U of C Calendar.

Student Services Centre – View As

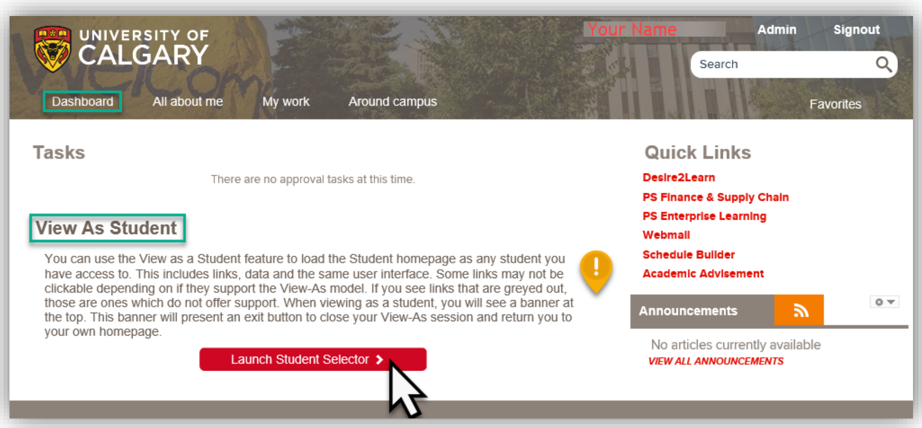
The View As component provides staff read-only access to the student's view of the Student Centre. The component is:
• Easy and quick to launch;
• Shows real-time student information;
• Is a secure view with de-activated data fields to prevent risk of changing student information; and,
• Transaction functionality is disabled for student actioned requests, submissions, information updates etc.

The Student Centre is where students access information about their student record. They can review To Do lists, register in courses, check grades, review their student financial account, accept awards, apply for a change program, obtain enrolment verification letters, and more.

How to Use View As

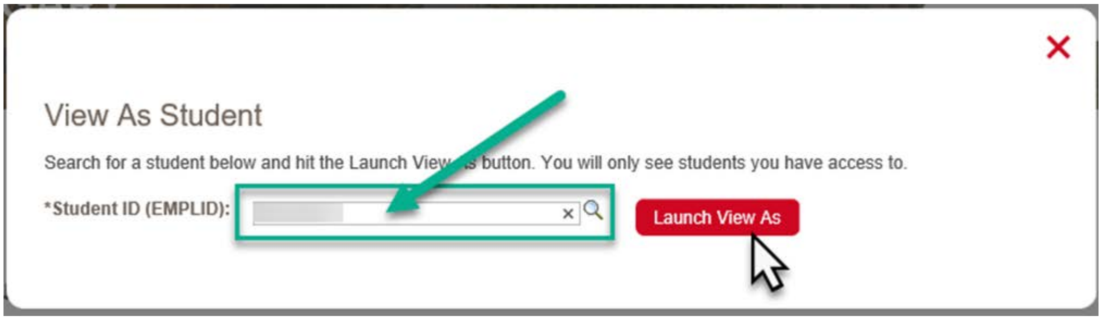
Step 1: Launching View As

- Log into the My UofC Portal with your securID
- **Dashboard** will display **View As Student** and **Launch Student Selector** button. Existing advisors will be provisioned with **View As** access. However, if the **View As Student** and **Launch Student Selector** button do not display, a PeopleSoft Access Request (PSAR) must be submitted requesting the role: **UC_SAST_REGULAR_USER**.
- Click the **Launch Student Selector** button.

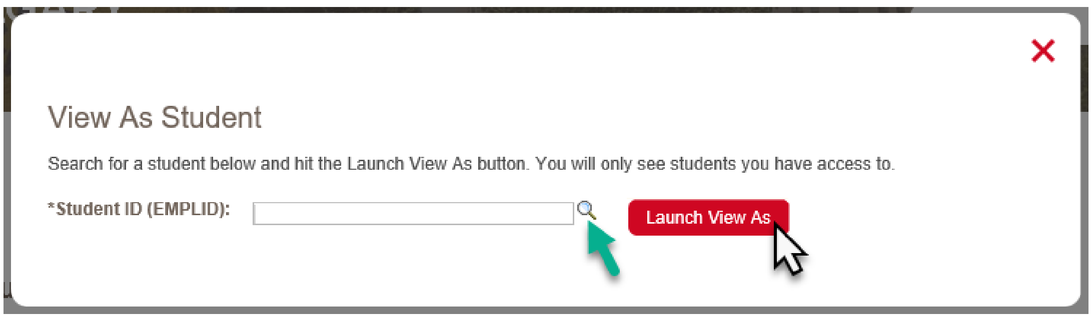


Step 2: Accessing a Student's View

- Enter the student's ID number and press the **Launch View As** button **OR**

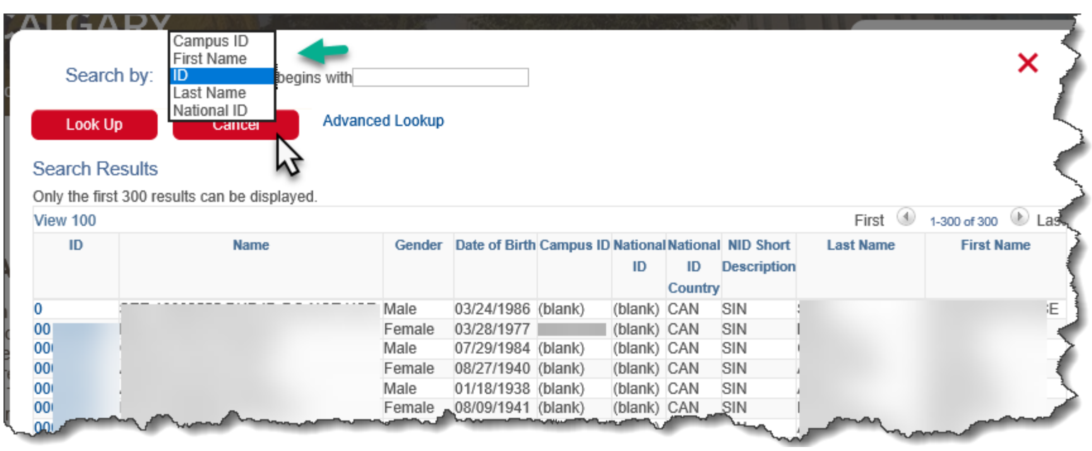


- Click the look up tool to search for the Student ID; press the **Launch View As** button **OR**



- Select **Search by** to search by first name, last name; press the **Launch View As** button.

Tip: Use **Search/Match** prior to this process if searching for first name, last name to confirm the student ID number you are working with is the correct student.

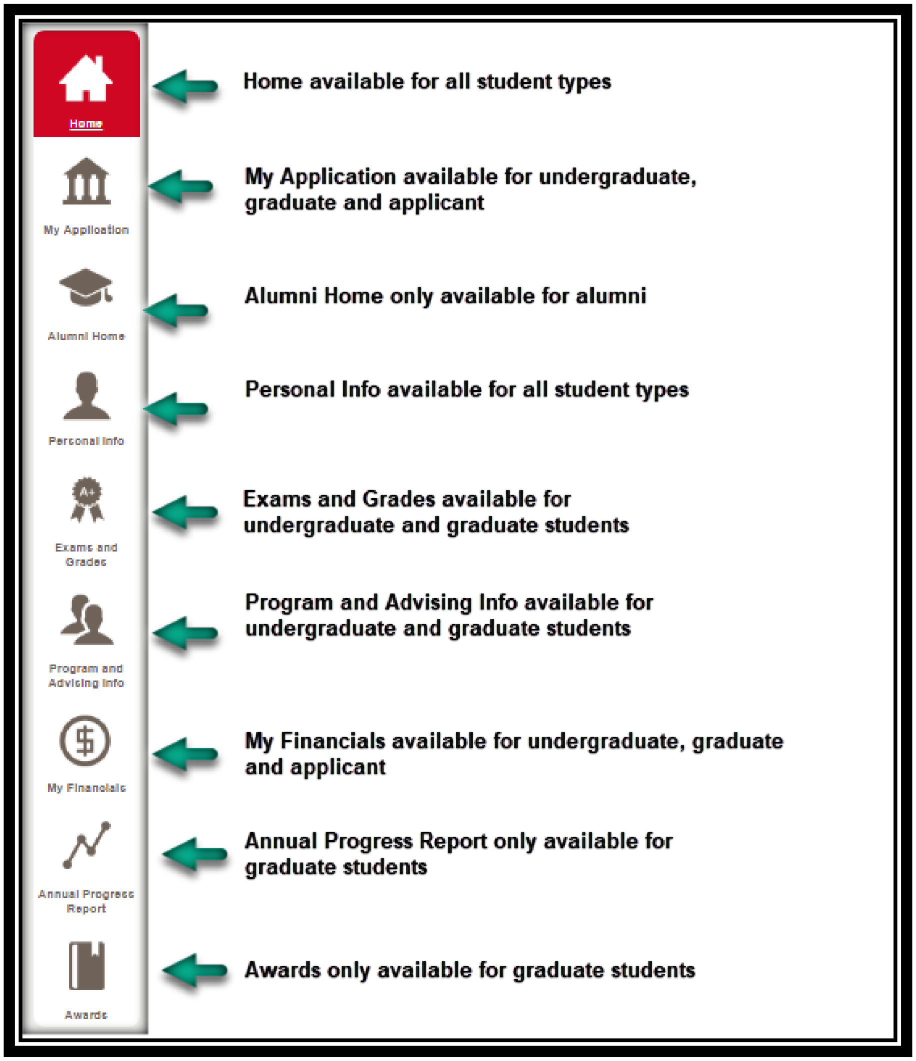


Step 3: Navigating the Student Centre using View As

A student's view of their academic information in the Student Centre is determined by their active status - undergraduate, graduate, alumni or new applicant. Depending on what type of student you are viewing, the pages will differ. For example, the new Alumni Home page is only viewable by an alumni student.

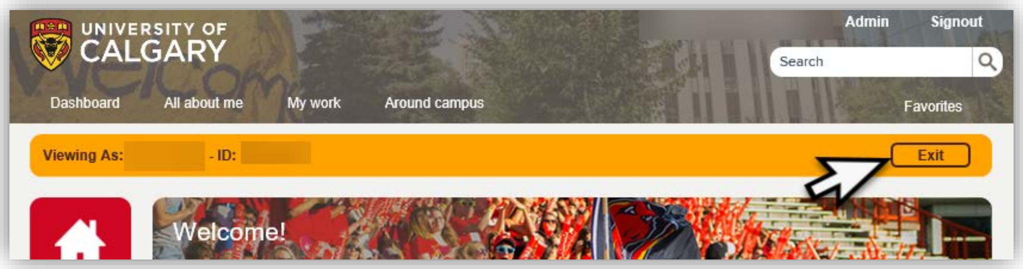
See what the Student Sees - Finding the Student's View

Using the graphical menu bar, navigate the Student Centre to find the student's view of the Student Centre.



Step 4: Exiting View As

To end the **View As** session and close the window, Click the **Exit** button. You will remain logged into the MyUofC Portal. If desired, you can enter another student ID and continue the process.



Student Centre Overview Using View As

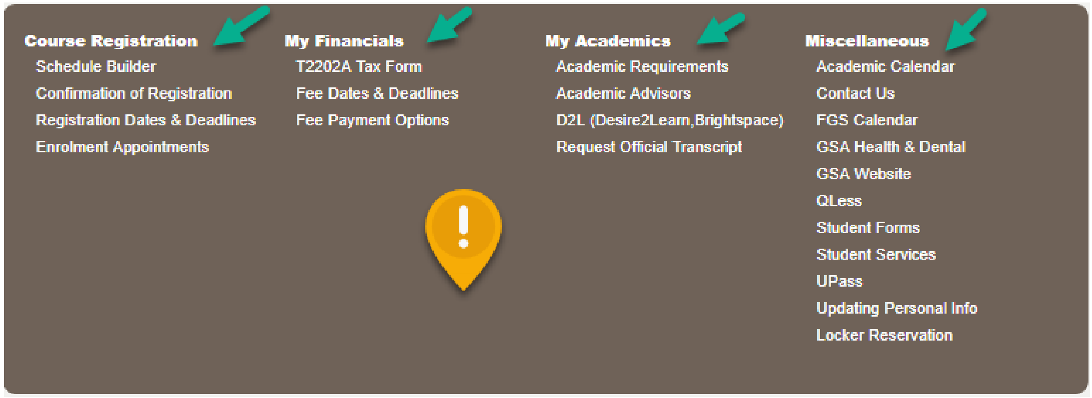
Standard Features – home page banner, page footer, quick links

Home Page Banner

The Home Page Banner will post messages that are important to the student's academic career, such as academic deadlines, registration dates, reminders and notifications. Each message will be customized to the student audience - new applicant, undergraduate, graduate and alumni.

Footer

The footer appears on every page and includes frequently used links. These links navigate directly to topic specific web pages for student related information.



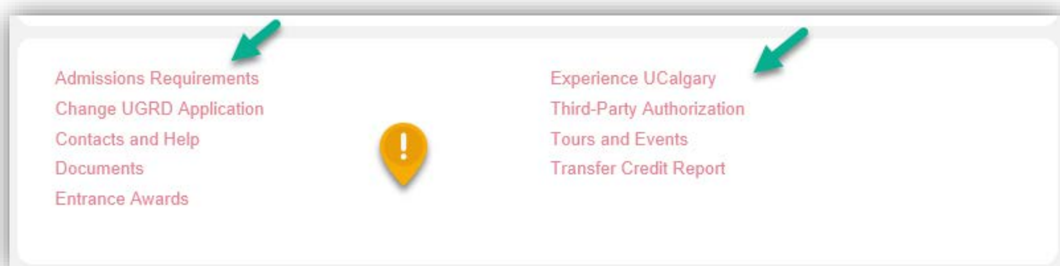
Quick Links – Student

Students can directly navigate to their information.

Common Academic Information for all Students – undergraduate, graduate, alumni and new applicant

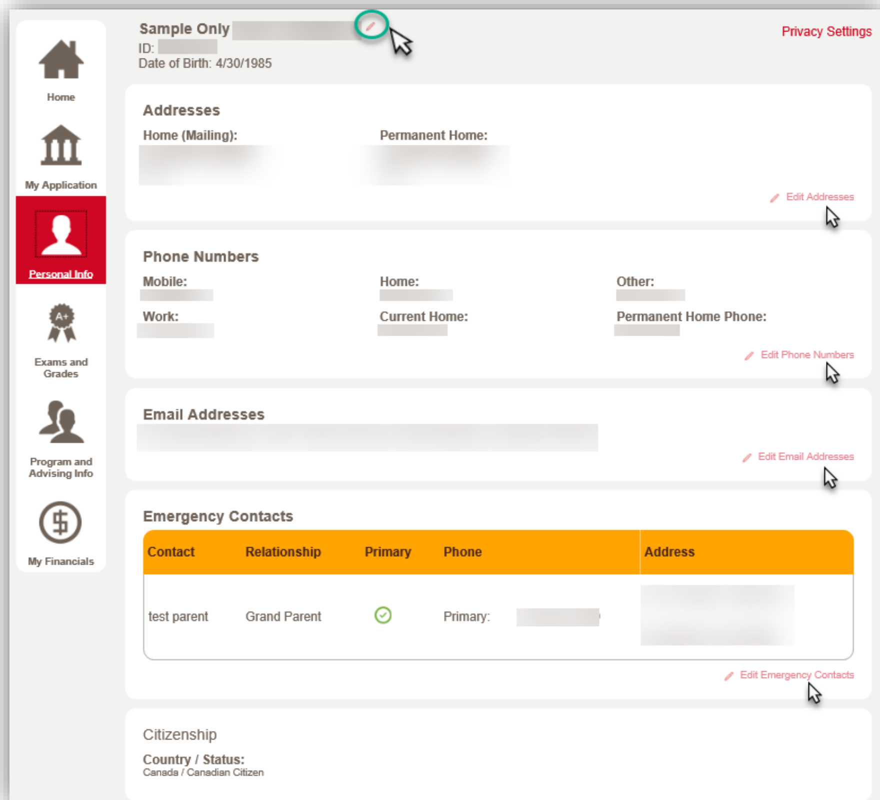
My Application Page

The lower portion of the page displays links relative to admissions and applications for admission.



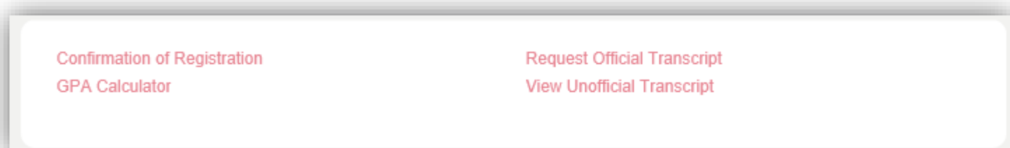
Personal Information Page

This page displays personal details about the student. Only a student can edit and change this information.



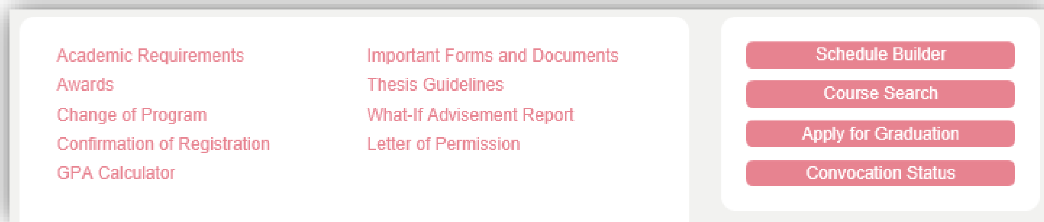
Exams and Grades Page

These links only available to students.



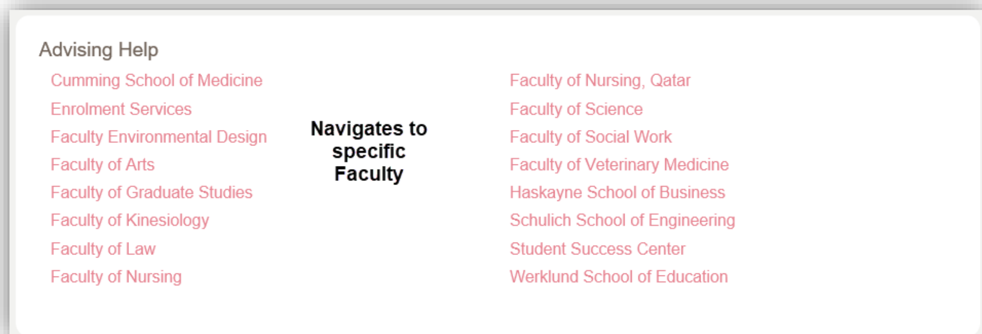
Program and Advising Info Page

This new page is a one-stop-location for students to access several key links as well as direct navigation to specific features.



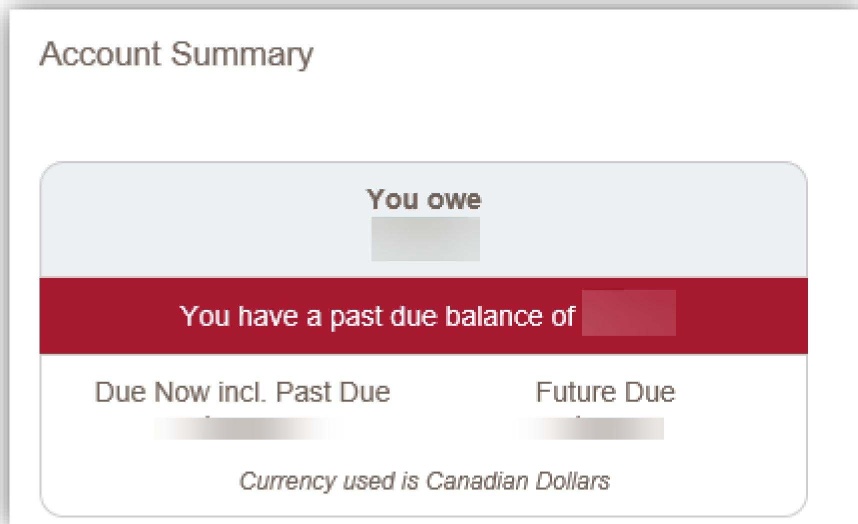
Advising Help

The listed links navigate to the corresponding faculty website and is visible to an undergraduate and graduate student.



My Financials Page

My Financials includes an Account Summary and, if applicable, past due, amount due and future due information will display.



Also available for the student, are links to Account Inquiry, Payments, Receipts, View/Request Refund, T2202A and Fees Calendar.

Opt-out links are available for Student Donation, Payment Plan, Health & Dental as well as GSA Health & Dental.

Direct links are available for applying for awards for Graduate and Undergraduate Awards.

✧ ***Notes:***

►**Student Services Centre – View As**
For additional instructions on the Student Services Centre – View As; consult Student Services Centre View As guide on the the training webpage.

Queries

Using the PeopleSoft delivered web-based Query Manager/Query Viewer Application, authorized users can search for and run pre-defined queries in real-time as required.

For example, Admissions can run queries to confirm outstanding deposits and incomplete applications. The Cashiers office can run a query to locate payment by date and amount.

Once the Query has been run, Query results can be downloaded in various formats such as HTML, Excel or CSV Text file and printed.

Queries can also be scheduled to run automatically with the results automatically forwarded via email to a distribution list.

1) **<u>Query Viewer</u>**
   This component demonstrates how to search for, view and download Query results.

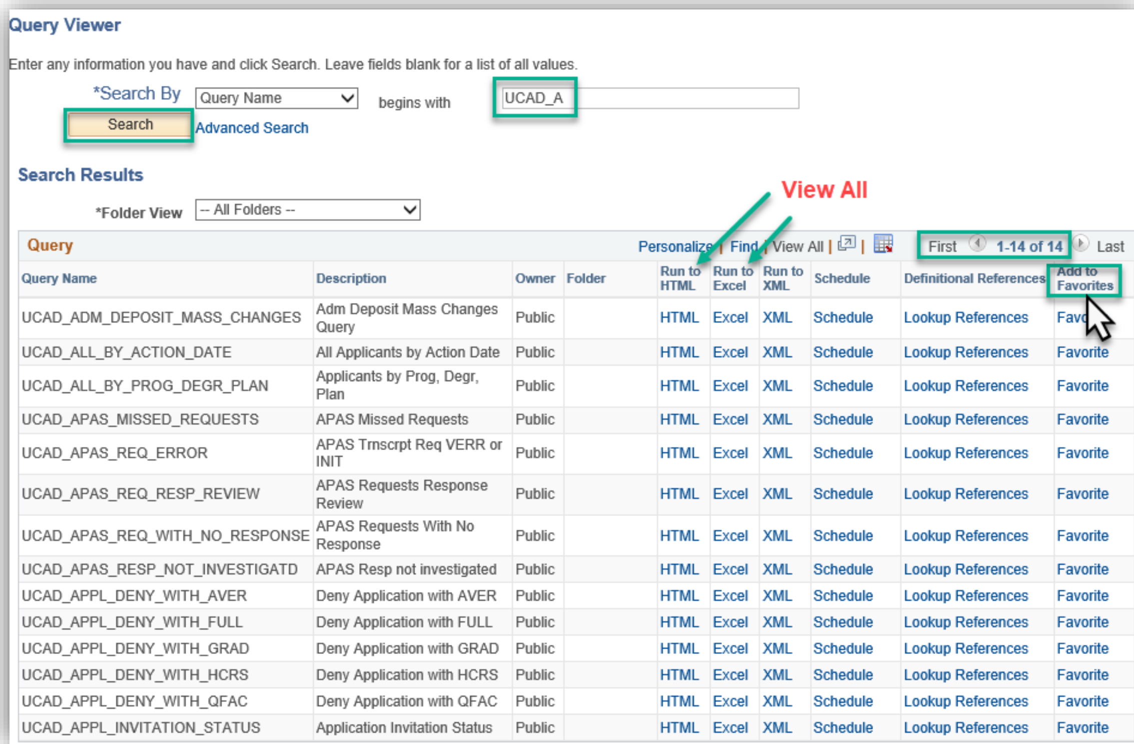
Query Viewer

Navigation:

► Breadcrumbs
Reporting Tools > Query > Query Viewer

Query Viewer

Users can view a list of Queries by using 'Search' or typing in part of the Query name if known. If the full name of the Query is unknown typing in a partial name, for example 'UCAD_A' (University of Calgary – Admissions) will produce a search results table with all Queries that begin with that parameter.



Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UCAD_ADM_DEPOSIT_MASS_CHANGES	Adm Deposit Mass Changes Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favo
UCAD_ALL_BY_ACTION_DATE	All Applicants by Action Date	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_ALL_BY_PROG_DEGR_PLAN	Applicants by Prog, Degr, Plan	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APAS_MISSED_REQUESTS	APAS Missed Requests	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APAS_REQ_ERROR	APAS Trnscrpt Req VERR or INIT	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APAS_REQ_RESP_REVIEW	APAS Requests Response Review	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APAS_REQ_WITH_NO_RESPONSE	APAS Requests With No Response	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APAS_RESP_NOT_INVESTIGATD	APAS Resp not investigated	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APPL_DENY_WITH_AVER	Deny Application with AVER	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APPL_DENY_WITH_FULL	Deny Application with FULL	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APPL_DENY_WITH_GRAD	Deny Application with GRAD	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APPL_DENY_WITH_HCRS	Deny Application with HCRS	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APPL_DENY_WITH_QFAC	Deny Application with QFAC	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UCAD_APPL_INVITATION_STATUS	Application Invitation Status	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

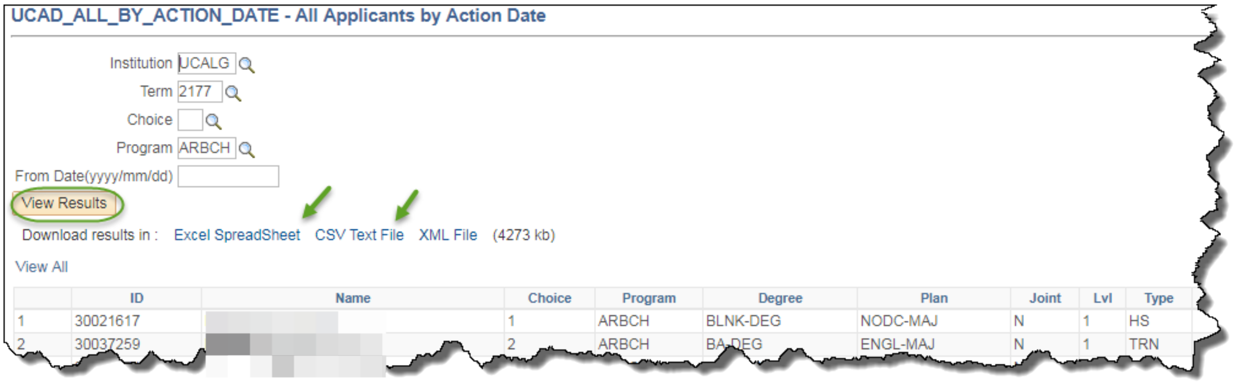
✧ ***Notes:***

►Searching for a Query

Users can search for a pre-defined query by typing in the name. A list of all queries can also be viewed by leaving the **'begins with'** field blank and clicking **'Search'**.

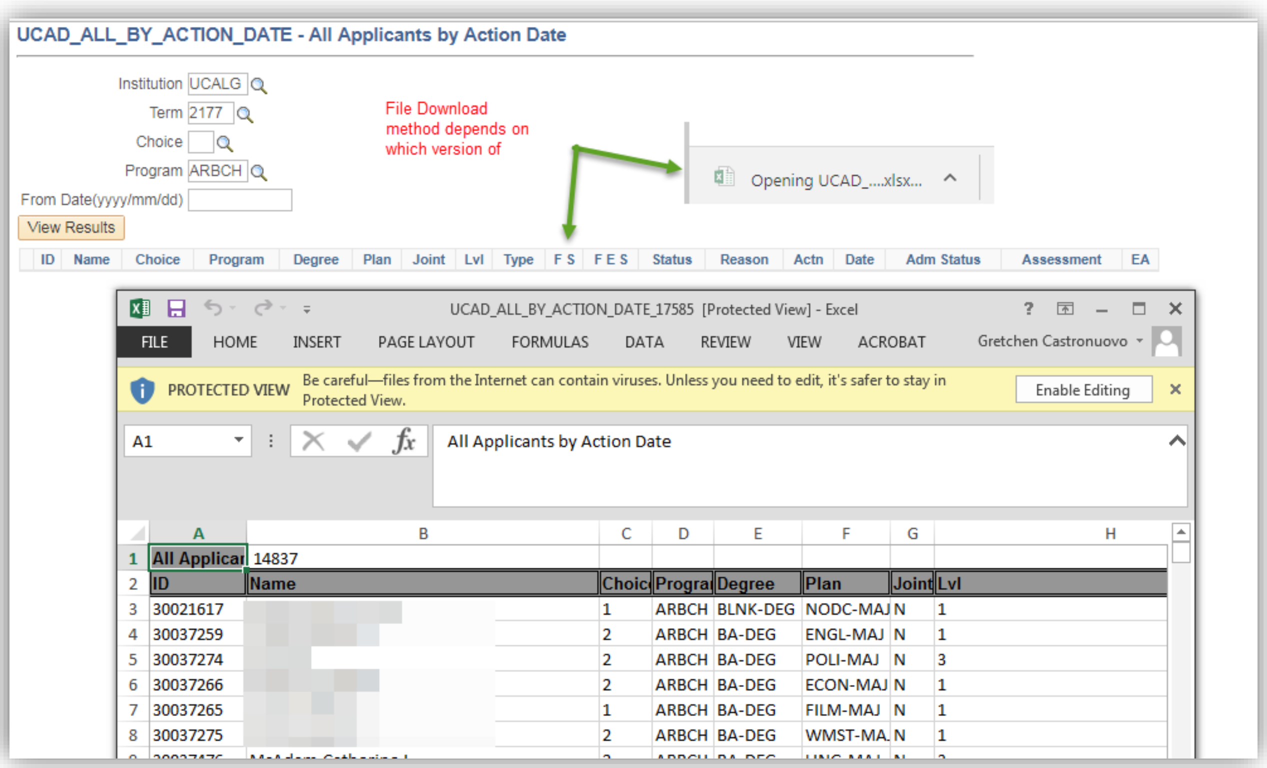
►Run to HTML

Selecting this option will open a new page where the user enters the search parameters displayed and click 'View Results' to load the query. The search parameters vary according to the Query selected. The Query can be downloaded to either an Excel sheet or a Comma Delimited Test file.



►Run to Excel

Selecting this option will also open a new page where the user inputs the query search parameters. This option downloads the results to an Excel file where the columns can be sorted as required. You can print the query using Excel's print function.



►CSV text file

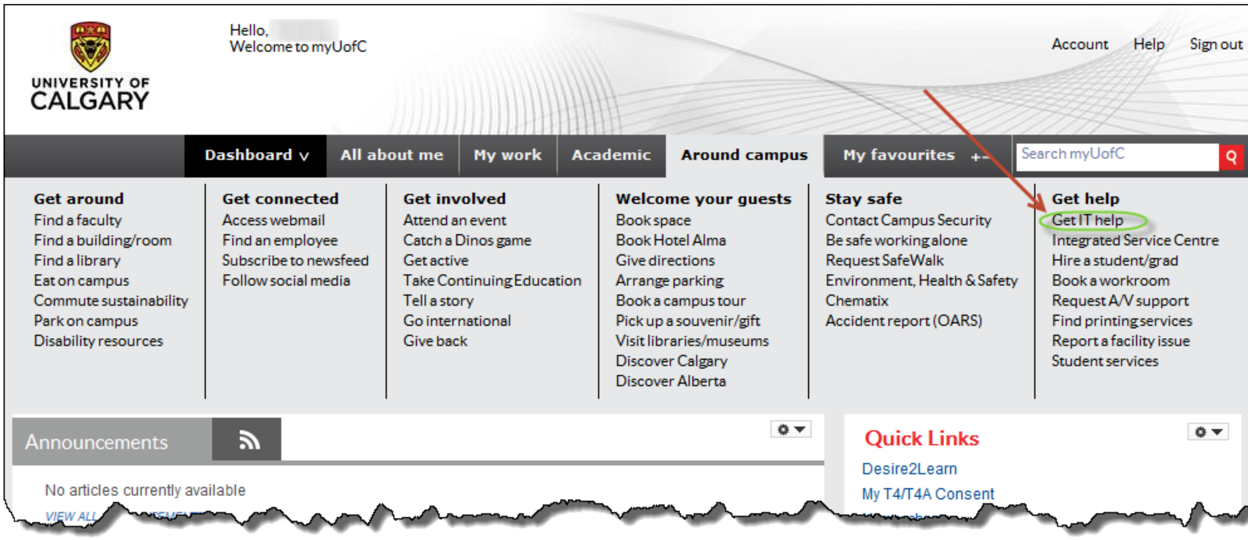
If the query is downloaded as a CSV text file, you can print it using the print functions of the applications you use to work with it.

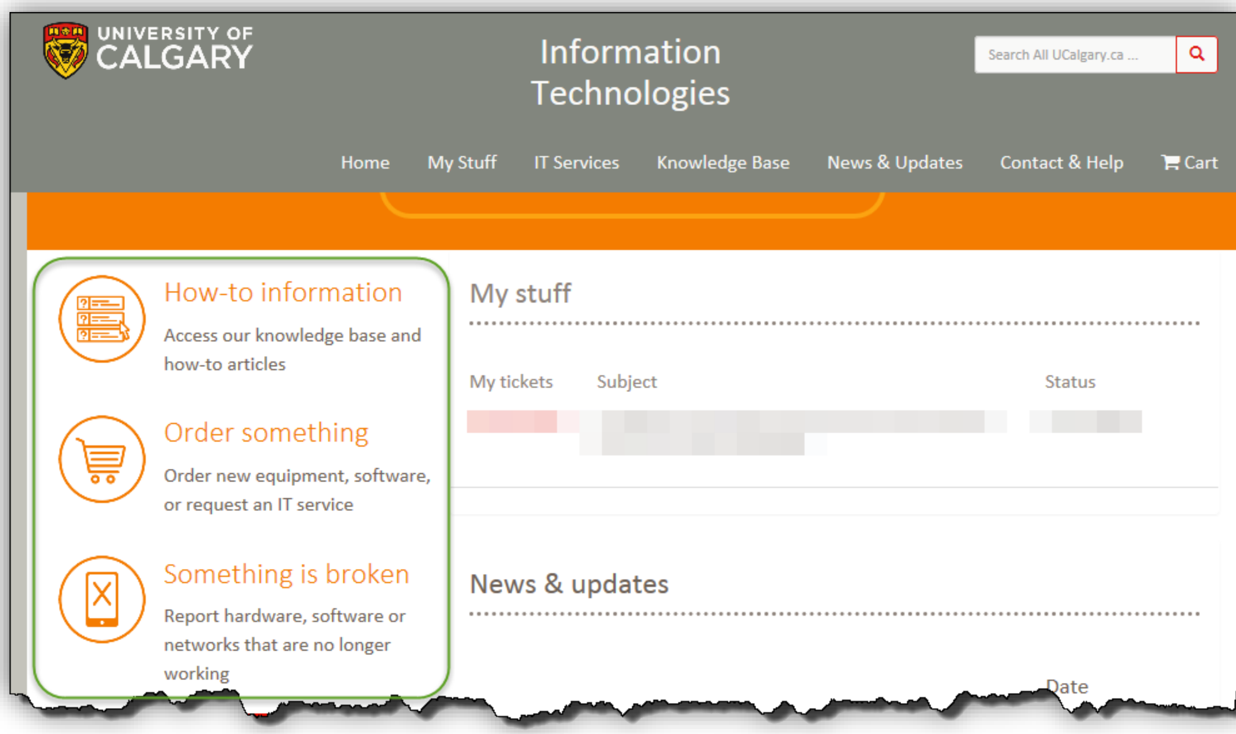
►**Schedule**
This option will allow the user to schedule the query to run at a specified time and email the results to a distribution list.

►**Add to Favorites**
If the user views a specific query frequently, they can add the query to their favorites list so every time they open the Query Viewer page is will be listed and they will not have to run a search by name.

How to Get Help

If assistance is required with Student Administration or Information Technologies issues, you can submit an online ***Information Technologies Service Now Request*** from the MyUofC Portal > Around Campus > Get IT Help > select the applicable service you desire.

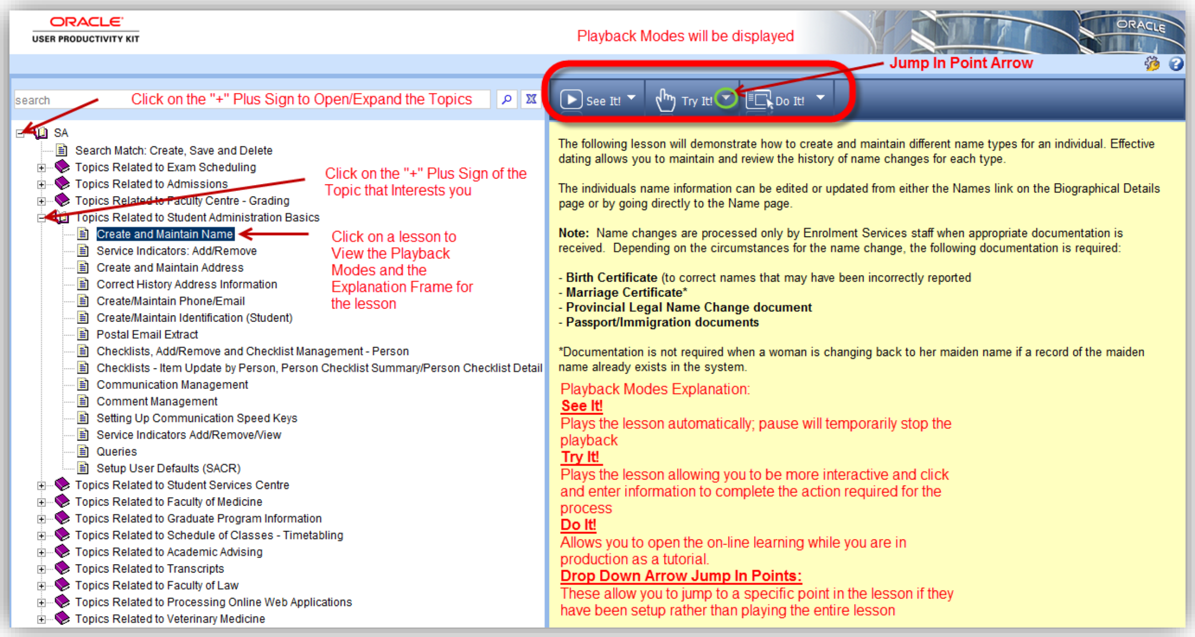




Once submitted, the request will auto-generate a **Service Now Ticket number** that will be directed to the appropriate support area for resolution. You can also submit a support request by calling the **Information Technologies Support Centre at 220-5555** or emailing itsupport@ucalgary.ca

Job Aids (step-by-step Student Administration PeopleSoft procedures) are available for several of the topics covered in Student Administration training courses. Job aids can be accessed on the Student and Enrolment Services (PeopleSoft) Training website at: https://live-ucalgary.ucalgary.ca/registrar/faculty-and-staff/ps-student-administration-training/student-administration-peoplesoft

Online Learning (User Productivity Kit) for Student Administration is also available by clicking on HELP within the Student Administration System.



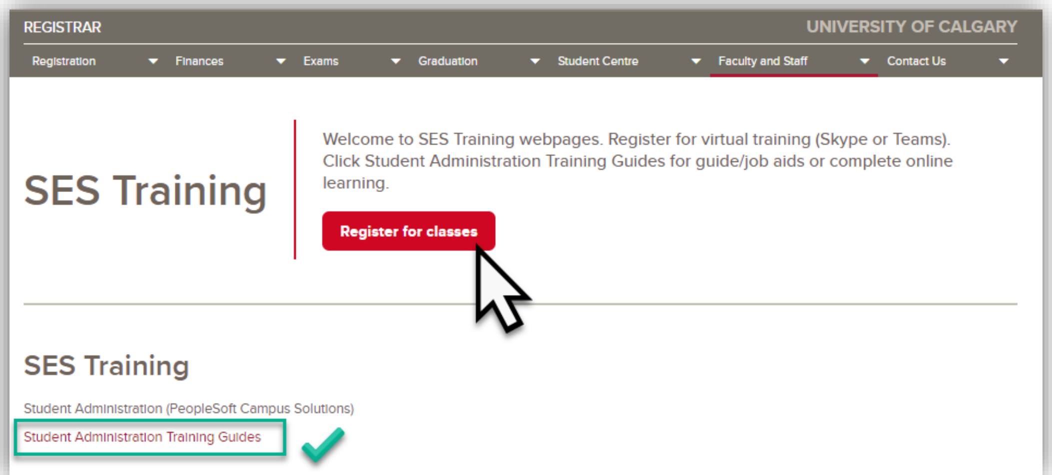
✧ ***Notes:***

►Online Learning (User Productivity Kit)
As development continues in UPK, so with the available choices for online learning. Check back often, or submit a request for development of an online learning course you would like created.

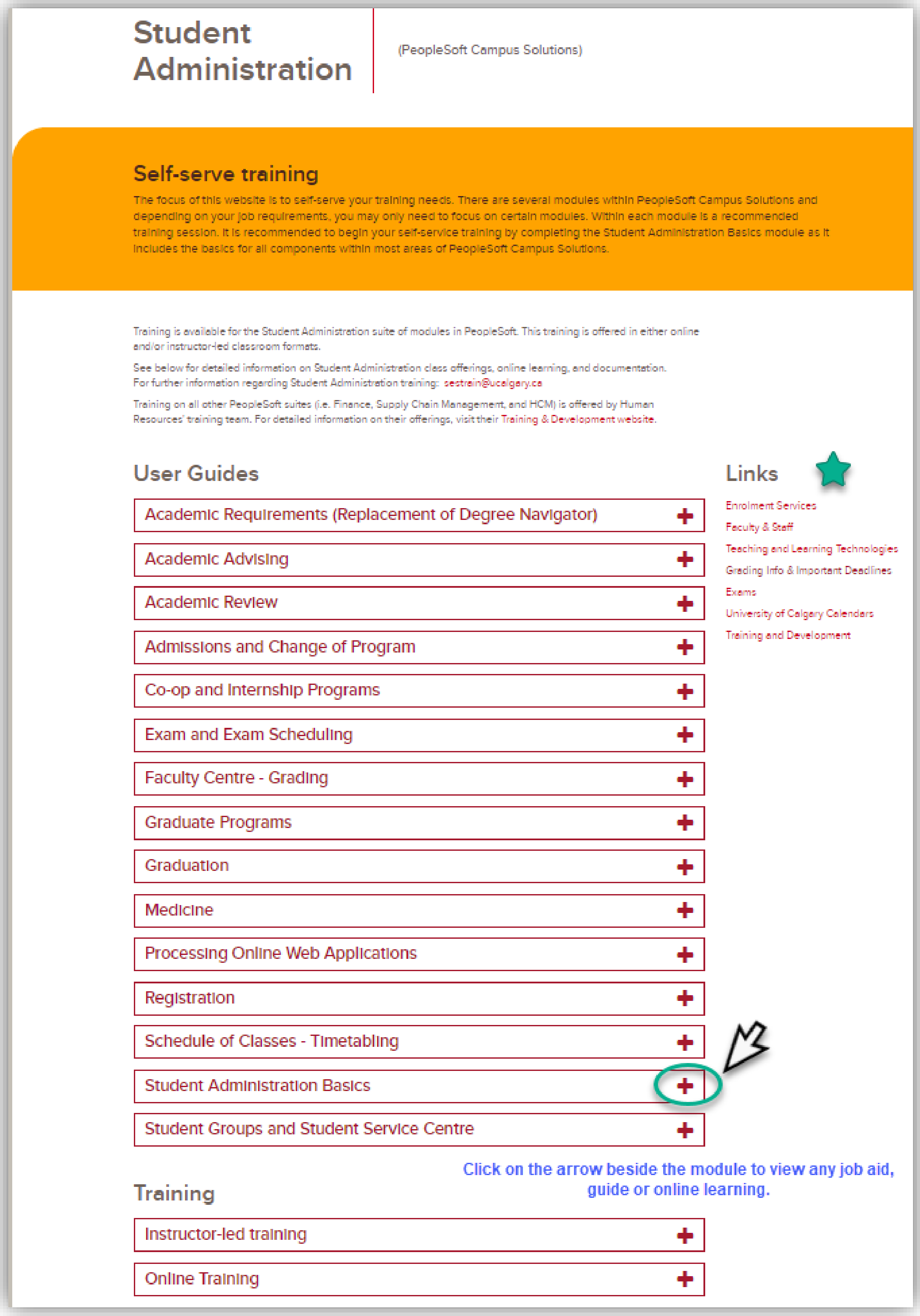
Student and Enrolment Services Training (SES) Website

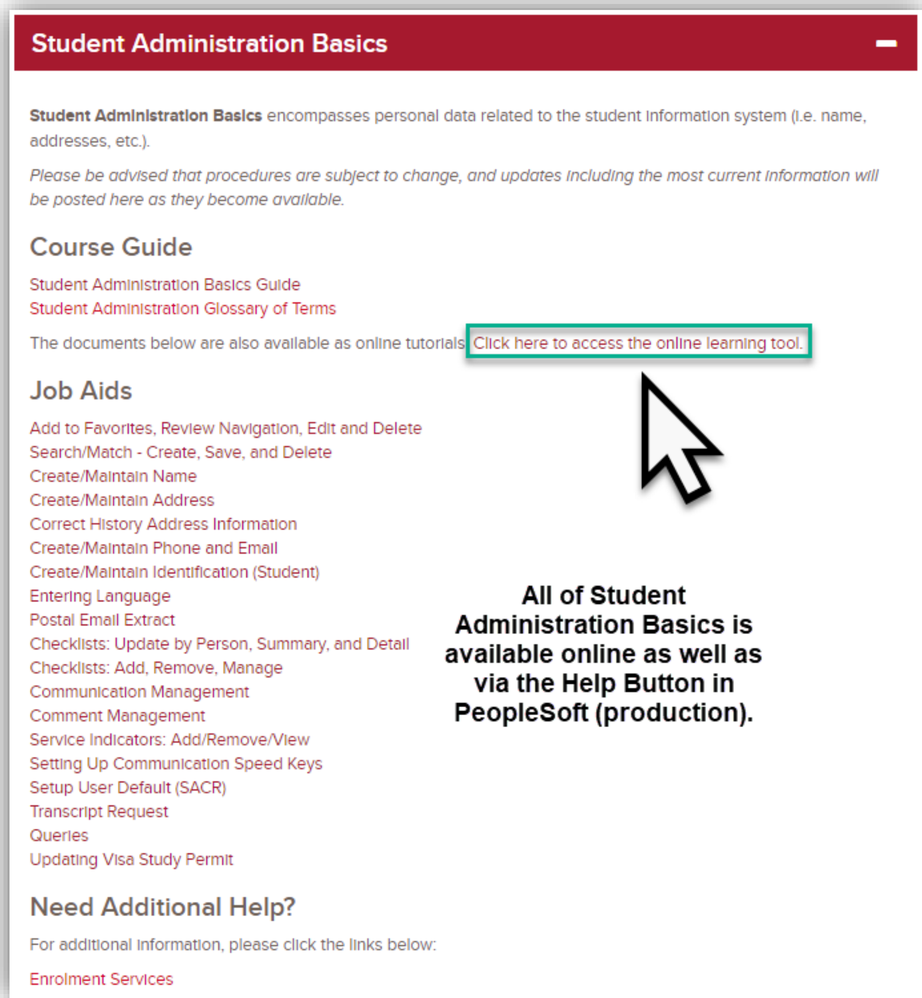
The SA Training website contains two sections of resource information; Registration and Student Administration Training Guides.
http://www.ucalgary.ca/registrar/training

Register for training with Student Administration/Campus Community instructor led training delivered virtually. Also, view a record of any training registered beginning April 2019 as it is captured in the Enterprise Learning Management System (ELM).



The Student Administration (PeopleSoft Campus Solutions) webpage page contains several hundred job aids, guides and online learning related to Student Administration. Select the applicable module and click on the arrow to expand any related job aids, guides, or view the online learning.





Student Administration Basics

Student Administration Basics encompasses personal data related to the student information system (i.e. name, addresses, etc.).

Please be advised that procedures are subject to change, and updates including the most current information will be posted here as they become available.

Course Guide

Student Administration Basics Guide
Student Administration Glossary of Terms

The documents below are also available as online tutorials. Click here to access the online learning tool.

Job Aids

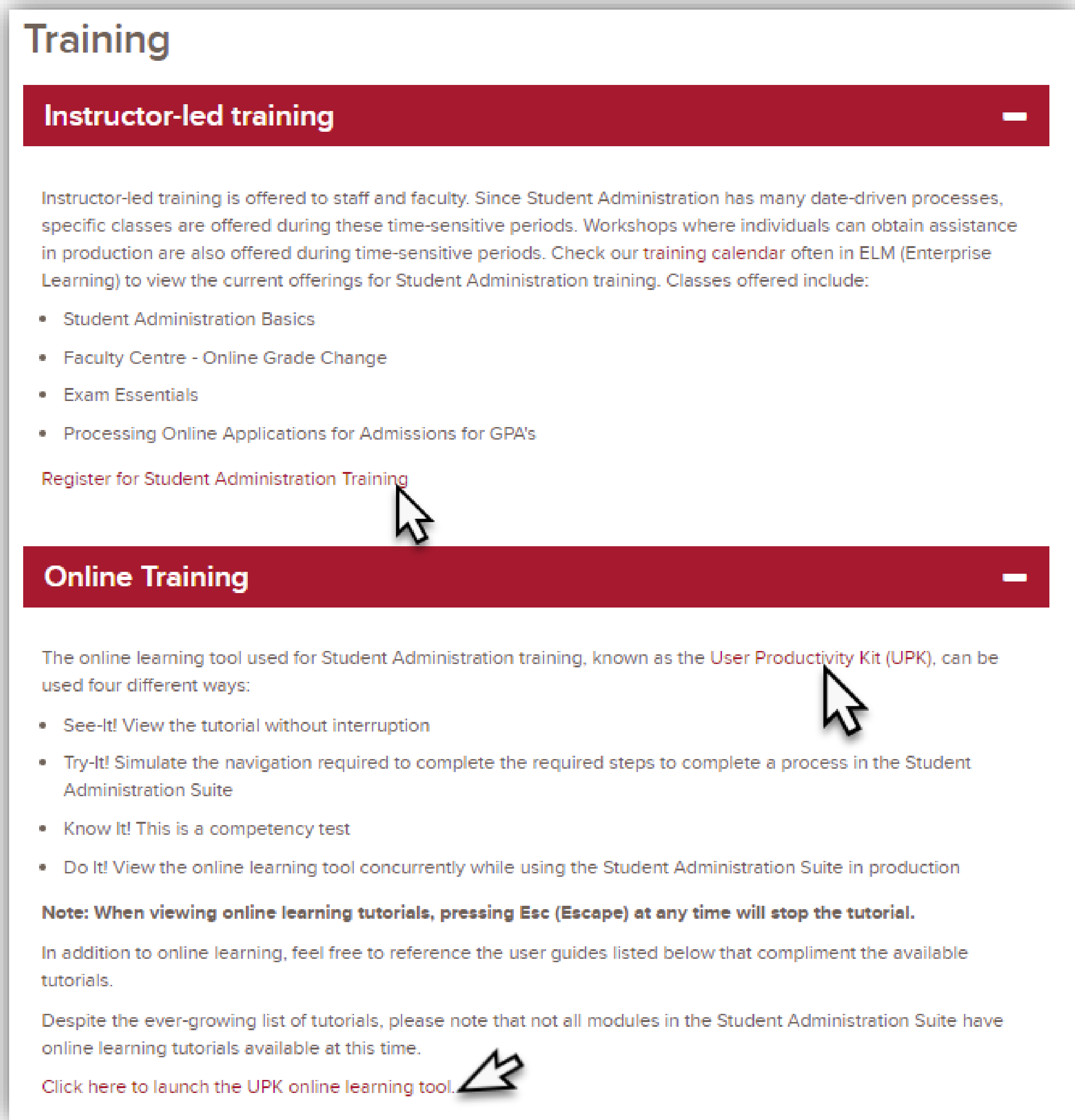
Add to Favorites, Review Navigation, Edit and Delete
Search/Match - Create, Save, and Delete
Create/Maintain Name
Create/Maintain Address
Correct History Address Information
Create/Maintain Phone and Email
Create/Maintain Identification (Student)
Entering Language
Postal Email Extract
Checklists: Update by Person, Summary, and Detail
Checklists: Add, Remove, Manage
Communication Management
Comment Management
Service Indicators: Add/Remove/View
Setting Up Communication Speed Keys
Setup User Default (SACR)
Transcript Request
Queries
Updating Visa Study Permit

All of Student Administration Basics is available online as well as via the Help Button in PeopleSoft (production).

Need Additional Help?

For additional information, please click the links below:

Enrolment Services



Training

Instructor-led training

Instructor-led training is offered to staff and faculty. Since Student Administration has many date-driven processes, specific classes are offered during these time-sensitive periods. Workshops where individuals can obtain assistance in production are also offered during time-sensitive periods. Check our training calendar often in ELM (Enterprise Learning) to view the current offerings for Student Administration training. Classes offered include:

- Student Administration Basics
- Faculty Centre - Online Grade Change
- Exam Essentials
- Processing Online Applications for Admissions for GPA's

Register for Student Administration Training

Online Training

The online learning tool used for Student Administration training, known as the User Productivity Kit (UPK), can be used four different ways:

- See-It! View the tutorial without interruption
- Try-It! Simulate the navigation required to complete the required steps to complete a process in the Student Administration Suite
- Know It! This is a competency test
- Do It! View the online learning tool concurrently while using the Student Administration Suite in production

Note: When viewing online learning tutorials, pressing Esc (Escape) at any time will stop the tutorial.

In addition to online learning, feel free to reference the user guides listed below that compliment the available tutorials.

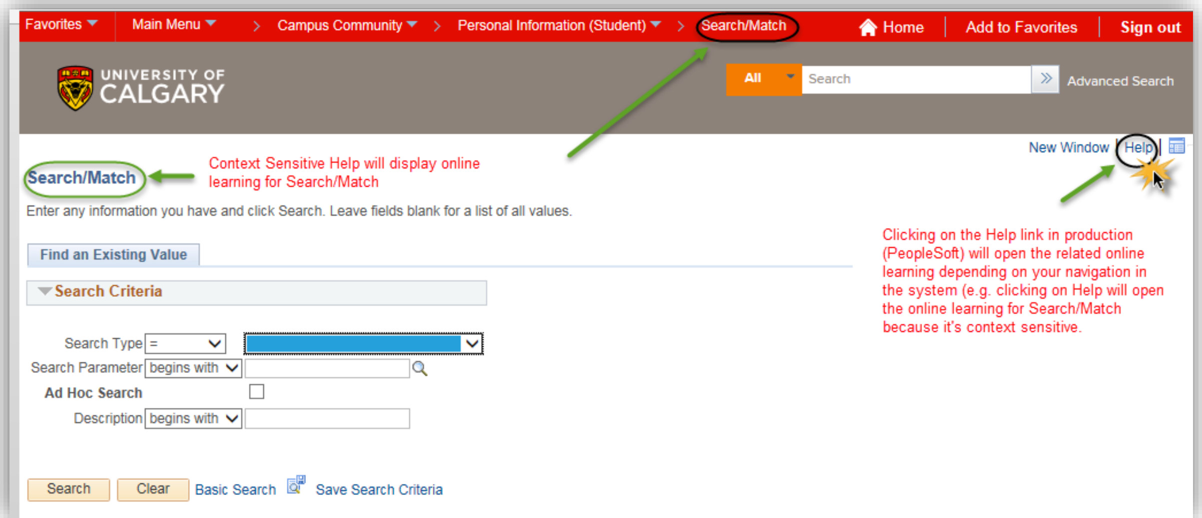
Despite the ever-growing list of tutorials, please note that not all modules in the Student Administration Suite have online learning tutorials available at this time.

Click here to launch the UPK online learning tool.

✧ ***Notes:***

►**Register for Classes**
This will display the training calendar and all upcoming instructor-led training to register in Student Administration Classes, Cancel or Change your Registration and check your course registration.
►**Support Documents**
Job Aids, training guides and many other important documents can be located for each module in the Student Administration System.
►**Online Learning (User Productivity Kit)**
Launch online learning in See It! Try It! or Do It! Mode to playback the online lesson.
►**Context Sensitive Help**

As previously mentioned, online learning is available for Student Administration and can also be accessed in production (PeopleSoft live environment) by pressing the Help link.



Appendix

Organization Affiliation

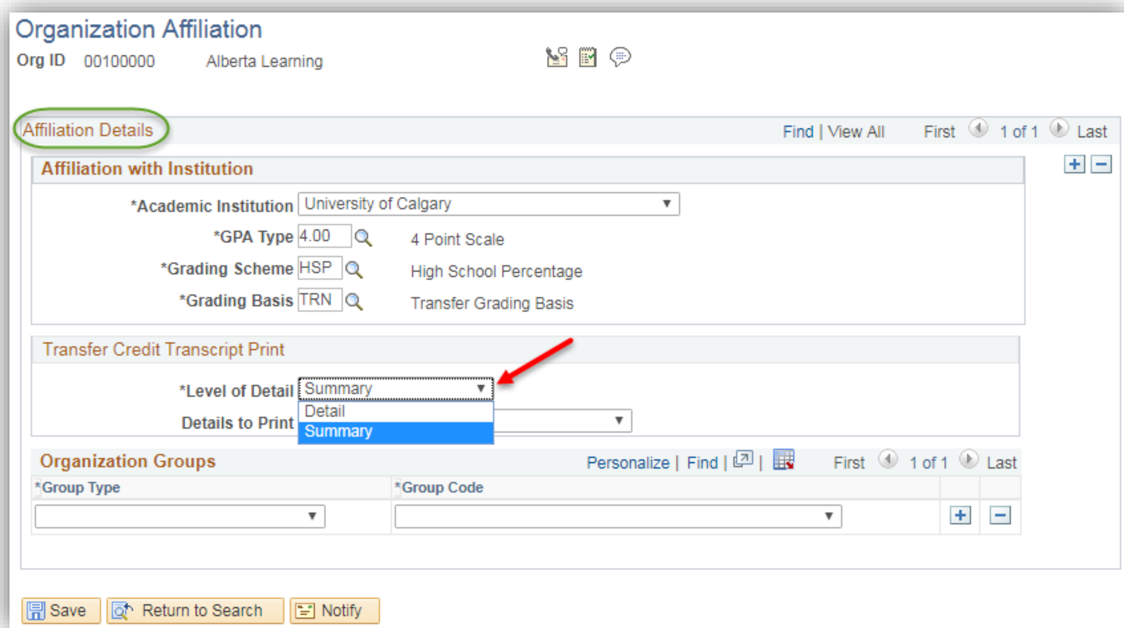
When an external organization offers courses, the Organization Affiliation page is used to reflect the GPA as well as the grading system used by the institution and must be configured. This page is also used to specify the level of detail of external course information to include in the transfer credit portion of the University of Calgary transcript.

Navigation:

► Breadcrumbs
Campus Community > Organization > Create/Maintain Organizations > Organization Affiliation

Organization Affiliation

The Organization Affiliation page records the organization affiliation details.



✧ ***Notes:***

►When *Summary* is selected, the system prints the total transferred units and GPA on the student's transcript.

►**Organization Groups**
This section is optional.

School Course Classification

This component discusses how to enter courses offered within the organization's subject areas in order to record an applicant's previous education.

The majority of users who can see this page will have "view" access only as access to this page is very restricted.

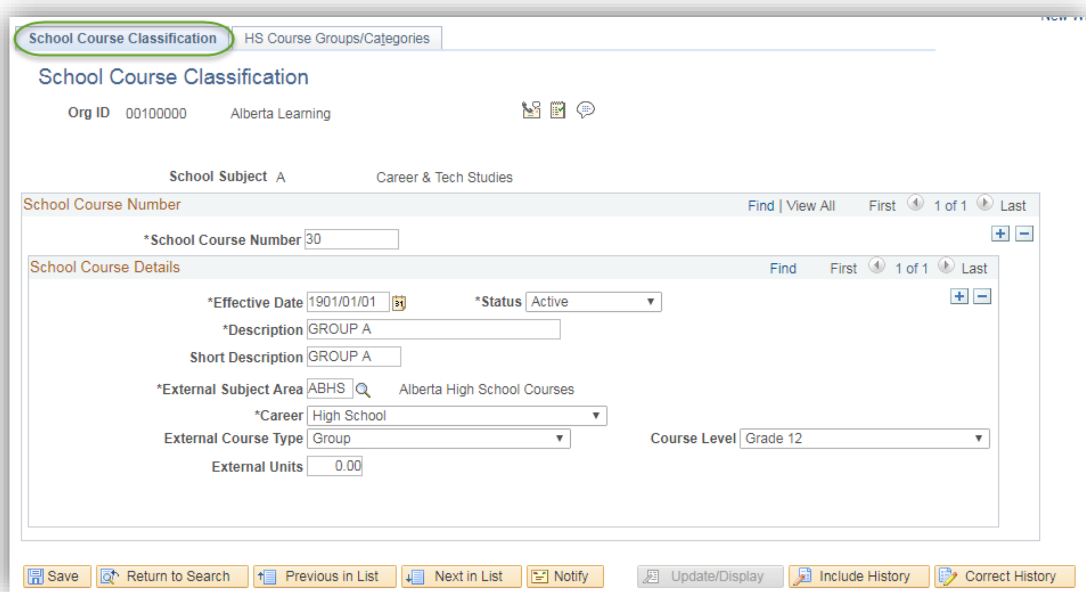
Courses configured include high school courses offered by Alberta Learning, High School Equivalents, High School Substitutes (i.e. International High School Courses) and Postsecondary courses.

Navigation:

► Breadcrumbs
Campus Community > Organization > Create/Maintain Organizations > School Course Classification

School Course Classification

The School Course Classification page is used to enter the external course number and the course details.



✧ ***Notes:***

School Subject

►School Course Number

This field is used to record the external course number.

School Course Details

►External Subject Area

The External Subject Area field is used to select the code that describes the subject area of the external course. A single subject can be used to represent courses that have different names but are similar in subject. For example, Science can be used to represent Chemistry and Biology.

►**Course Level**
This field is used to enter the level at which the course is offered.

►**External Units**
The External Units field indicates the number of units offered by this course.

HS Groups/Categories

The majority of users who can see this page will have "view" access only as access to this page is very restricted.