Oracle’s PeopleSoft Enterprise
Campus Solutions 9.0

Release Notes
December 2006

ORACLE
PEOPLESOFT ENTERPRISE
Purpose Statement:
This document provides an overview of features and enhancements included in PeopleSoft Enterprise Campus Solutions 9.0. It is intended solely to help you assess the business benefits of upgrading to PeopleSoft Campus Solutions 9.0 and to plan your IT projects.

Disclaimer:
This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Software License and Service Agreement, which has been executed and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

This document is for informational purposes only and is intended solely to assist you in planning for the implementation and upgrade of the product features described. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

Due to the nature of the product architecture, it may not be possible to safely include all features described in this document without risking significant destabilization of the code.
Oracle’s PeopleSoft Enterprise
Campus Solutions 9.0 Release Notes

Executive Summary ................................................................. 5
Introduction: PeopleSoft Campus Solutions 9.0 Overall Value
Proposition................................................................................. 5
Superior Ownership Experience .................................................. 6
PeopleSoft Campus Solutions 9.0 Drivers...................................... 6
Customer Commitment: Protecting Your Investment .................. 7
Extending the Virtual Campus .................................................... 7
Path to a Service-Oriented Architecture ..................................... 7
PeopleSoft Campus Community 9.0 ........................................... 8
3C Enhancements ........................................................................ 8
Population Selection ..................................................................... 11
PeopleSoft Query ......................................................................... 13
Equation Engine ........................................................................... 13
External File .................................................................................. 13
Population Update ........................................................................ 13
External Organizations ............................................................... 15
Service Indicators ........................................................................ 15
Self Service ................................................................................... 17
Personal Data Summary Page ..................................................... 18
Configurability ............................................................................. 18
PeopleSoft Recruiting and Admissions 9.0 .............................. 19
Academic Program, Plan, Subplan Deactivation Control ............. 19
External Education Component ................................................. 21
Prospect and Application Deletion Process ................................ 22
PeopleSoft Student Records 9.0 .................................................. 23
Self-Service Usability: Student and Faculty Centers .................. 23
Faculty Center Enhancements .................................................... 23
Student Center Enhancements ................................................... 25
Flexible Transcripts .................................................................... 29
Enhancements to Transcript Production ..................................... 29
Processing Batch Transcript Requests ....................................... 29
Transcript Type Component Enhancements ................................ 30
Transcript Request Inquiry ......................................................... 30
Class Permissions ....................................................................... 31
Usability and Security for Student Groups ................................. 33
Academic Advisement ............................................................... 35
The Enrollment Backpack: My Academic Requirements ........... 35
Enrollment Backpack: My Planner ............................................. 37
Program Guide ............................................................................ 38
Advisement Information for Advisors ....................................... 39
Academic Advisement Reporting ............................................. 39
Academic Data Enhancements .................................................... 40
Term and Cumulative Statistics and Grade Point ...................... 40
Repeat Checking ......................................................................... 43
Repeat Classes on the Academic Advisement Report ................. 43
Repeat Logic Extended ............................................................... 43
Transfer Credit External Course Grade Setup ......................... 44
PeopleSoft Student Financials 9.0 ............................................. 45
Late Fee Processing ................................................................. 45
Payment Plans and Third-Party Contracts.......................................................... 46
Batch Data Entry Page ...................................................................................... 47
Batch Assignment Using Population Selection................................................. 47
Mass Cancellation ............................................................................................... 47
Self-Service Enrollment ..................................................................................... 47
Billing .................................................................................................................. 47
Self-Service Miscellaneous Purchases .............................................................. 48
(USA) Self-Service 1098-T Forms .................................................................... 49
Global Invoicing ................................................................................................. 50
PeopleSoft Financial Aid 9.0 ............................................................................... 51
External Award Feature ..................................................................................... 51
Packaging .......................................................................................................... 53
Auto Select Packaging ...................................................................................... 53
Mass Packaging Query Definition ..................................................................... 53
Repackaging ....................................................................................................... 53
Self Service ....................................................................................................... 55
Report External Awards .................................................................................... 55
View and Print Financial Aid Award Notice .................................................... 55
Select a Lender ................................................................................................. 56
Access Loan Counseling .................................................................................. 57
Authorize Application of Financial Aid Funds for Non-Allowable Charges .... 57
Population Update and Population Selection .................................................. 58
PeopleSoft Contributor Relations 9.0 .............................................................. 59
External Organizations ..................................................................................... 59
Usability Improvements ................................................................................... 62
Prospect Management ...................................................................................... 64
Searches ............................................................................................................ 64
Academic Summary .......................................................................................... 66
Tender Detail Extensions ................................................................................... 67
Matching Gift Extensions .................................................................................. 68
Session Extensions ........................................................................................... 69
Population Selection ........................................................................................ 70
Communication ................................................................................................. 71
Conclusion ......................................................................................................... 72
EXECUTIVE SUMMARY

This document provides an overview of the new features and enhancements delivered in Oracle’s PeopleSoft Enterprise Campus Solutions 9.0 products. It is intended to help you assess the business benefits of PeopleSoft Campus Solutions 9.0 and plan your IT projects and investments.

The new features and enhancements included in this release are grouped by functional areas, to better demonstrate how these solutions can help you optimize your business. Our goal is to help your organization leverage technology to its fullest and increase the efficiency and effectiveness of your operations.

The included enhancements are grouped by the following functional areas:

- Campus Community
- Recruiting & Admissions
- Student Records & Advisement
- Student Financials
- Financial Aid
- Contributor Relations

Oracle’s PeopleSoft Enterprise Performance Management (EPM) 9.0 for Campus Solutions was released in August 2006. You can access release notes, datasheets, and other information about the powerful analytics and business intelligence release for PeopleSoft Campus Solutions on Oracle’s PeopleSoft Customer Connection website.

INTRODUCTION: PEOPLESOFT CAMPUS SOLUTIONS 9.0 OVERALL VALUE PROPOSITION

PeopleSoft Campus Solutions 9.0 is Oracle’s newest global solution suite for intuitive and effective management of all your campus constituents, including applicants, students, faculty, alumni, and donors. Creating a rapid return on investment, PeopleSoft Campus Solutions applications automate business processes, reduce operational costs, and increase efficiencies by continually defining and leveraging industry best practices.

In response to customer and market demands, Oracle continues to lead and innovate—creating products, features, and functions that set the foundation for supporting the unique academic mission of its higher education customers. As a result, PeopleSoft Campus Solutions 9.0 plans to build on the innovations in 8.9 by extending functional excellence, adding powerful business intelligence, and improving collaboration tools to enhance usability and the customer experience.
PeopleSoft Campus Solutions 9.0 is a robust product suite within the overall enterprise strategy of PeopleSoft Enterprise Human Capital Management (HCM). You can find information about PeopleSoft HCM 9.0 in a separate PeopleSoft HCM Release Notes document on Customer Connection.

**Superior Ownership Experience**

PeopleSoft Campus Solutions 9.0 continues its commitment to quality—the Superior Ownership Experience. An extension of the Total Ownership Experience, the Superior Ownership Experience is a set of delivered technologies aimed at improving user experience with Oracle applications in the areas of installation, configuration, automation, integration, and documentation.

Oracle’s Superior Ownership Experience is a company-wide initiative that has touch points across all applications, from development to delivery, installation to implementation, and support to lifecycle management.

**PeopleSoft Campus Solutions 9.0 Drivers**

Today’s education environment calls for institution management to go beyond the basics. With highly diverse and changing student population compositions, institutions must focus on attracting, nurturing, and retaining the best students, faculty, alumni, and staff. Because of increased scrutiny, accountability, performance, and cost controls to guide operations, technology investments must be strategic and provide demonstrable return on investment to the institution.

The PeopleSoft Campus Solutions 9.0 design is based on extensive customer feedback, industry best practices, analyst research, and commitment to industry leadership.

PeopleSoft Campus Solutions 9.0 represents a continued commitment to excellence and quality and is inspired by three key themes:

*Protecting Your Investment*

- Supporting your current products.
- Ensuring customer-paced upgrade paths to future applications.

*Extending the Value*

- Adding customer-driven features and significant enhancements.
- Increasing involvement in industry standards.
- Introducing next-generation capabilities.

*Evolving to the Next Generation*

- Evolving to information-age applications.
- Providing a clear and supported upgrade path to Fusion products.
Customer Commitment: Protecting Your Investment

PeopleSoft Campus Solutions 9.0 offers enhancements to key business processes across the applications, as well as some new utilities to enable institutions to extend existing capabilities. The scope of this release is centered on the highest priorities of Oracle’s customer advisory groups, with input from Oracle’s Higher Education team. Oracle is providing students and advisors with a powerful tool, based on PeopleSoft Academic Advisement, to assist in planning how to meet academic goals. Enhanced flexibility in processes, such as financial aid packaging, fee assignment, transcript creation, and production, is also in this release. New tools, such as the Communication Generation engine and Population Selection, will greatly enhance the power and usability of the Campus Solutions applications.

In addition to the enhancements for the core applications, another PeopleSoft product family, EPM, added three new datamarts based on the Student Administration application. These datamarts, released in August 2006 in PeopleSoft EPM 9.0, augment the EPM solution for Higher Education customers. The new datamarts include the warehouse content for PeopleSoft HRMS, Financials, CRM, and now Student Administration data.

As stated previously, you can find more detailed information about the PeopleSoft EPM 9.0 Campus Solutions Warehouse on Customer Connection.

Extending the Virtual Campus

PeopleSoft Campus Solutions 9.0 delivers significant extensions to the existing student, faculty, and administrative “center” approach to information organization and deployment. This concept is realized in PeopleSoft Enterprise Contributor Relations with the Organization, Prospect, and Person profiles that provide 360-degree views into the activities and key information about these elements of your campus community. The goals of the self-service enhancements in this release are to reduce administrative burden while providing relevant and accessible content and transactions for your constituencies.

Path to a Service-Oriented Architecture

PeopleSoft Campus Solutions 9.0 delivers ongoing commitment to Services Oriented Architecture with enhanced web services to improve extensibility and performance. The HCM 9.0 Service Registry provides interface specifications for all available HCM services. Additional information about the service registry can be found in a separate HCM 9.0 Release Notes document on Customer Connection.

This release also leverages the rich technology foundation offered by Oracle’s Fusion Middleware Suite to deliver solutions such as XML Publisher. The integration to PeopleSoft XML Publisher (XMLP), delivered as part of PeopleTools 8.48, provides a new approach to report design and publishing by integrating familiar desktop tools with enterprise application reporting. PeopleSoft Campus Solutions 9.0 delivers a number of different features that leverage the use of PeopleSoft XML Publisher templates and document merging capabilities.
PeopleSoft XMLP is delivered as part of PeopleTools 8.48 and provides additional functionality as a template-based reporting solution. Oracle’s XML Publisher is a standalone java-based reporting technology that streamlines report and form generation. Built on the Extensible Stylesheet Language Formatting Objects (XSLFO) standard, a primary feature of PeopleSoft XMLP is the separation of the data extraction process from the report layout. PeopleSoft XMLP provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and PeopleSoft XMLP renders XML data based on those templates. With a single template, PeopleSoft XMLP can generate reports in many formats (for example, PDF, RTF, Excel, and HTML) and in many languages. This approach to reporting can dramatically reduce report maintenance, enabling power business users to adjust report templates without involving IT resources.

Select features of PeopleSoft XMLP have been integrated into and enhanced for use with PeopleTools. PeopleSoft XML Publisher makes Oracle XMLP technology natively accessible from PS Query, as well as from any PeopleTools 8.48-based applications providing XML data. PeopleSoft XML Publisher provides an environment for the user to manage templates, data sources, reports, translations, and content components. It also offers an electronic bursting capability to produce reports according to user-defined criteria. You can secure the reports using an application’s security join table. PeopleSoft XML Publisher also provides a set of PeopleCode application programming interfaces (APIs) for runtime report generation.

PEOPLESOFT CAMPUS COMMUNITY 9.0

As the foundation for the entire PeopleSoft Campus Solutions suite, PeopleSoft Campus Community provides value to many business processes beyond the core module. PeopleSoft Campus Community 9.0 includes enhancements to the following features:

- 3Cs (Communications and Checklists)
- Population Selection and Update
- External Organizations
- Service Indicators
- Self-Service Enhancements

3C Enhancements

The familiar Letter Generation process within PeopleSoft Campus Solutions provides a means for generating letters using sample Microsoft Word templates and your own word processing software. In PeopleSoft Campus Solutions 9.0, Oracle delivers an additional process, the Communication Generation process, for a more streamlined way to produce multiple types of communication in a variety of formats.
The Communication Generation process does not replace the existing Letter Generation process or communication structures, but instead provides greater power and flexibility for creating communications. The Communication Generation process does everything that the Letter Generation process does, but with additional flexibility.

With the Communication Generation process, you can produce letter or email communications. You can generate communications in any language that your institution supports. Individuals can set communication preferences either in the core administrative product or in Campus Self Service so that you can produce communications to them in the language and method that they prefer.

With this release, individuals can indicate how they want to receive communications from you for more personalized and targeted messages.

The Campus Community Installation page enables you to select the languages that your institution supports and for which you provide templates. When you run the Communication Generation process, you can select to use the template that corresponds to the preferred language selected for each user ID or force a language if no translation has been created.

The Communication Generation process is a PeopleSoft Application Engine program that is constructed using Oracle’s new XML Publisher, a new java-based technology available with PeopleTools 8.48. You can create templates using Microsoft Word with the delivered XML Publisher design helper or Acrobat Adobe. The supported formats for the templates are PDF, RTF, eText, and XSL.

The existing Letter Generation process extracts all fields for an administrative function, regardless of how many or how few fields that you might need for a specific letter. The Communication Generation process uses Oracle’s XML Publisher to enable you to decide, in advance, which fields to extract for a letter. By selecting only the fields that you need, you reduce the size of the download and thereby reduce the possible security exposure of large files of extracted data.

Oracle’s XML Publisher is also a flexible report-creation tool. Using a set of familiar desktop tools, such as Adobe Acrobat and Microsoft Word, users can create and maintain their own report formats based on development-delivered XML data extracts. The XML Publisher converts these report formats to the XSL-FO format.

The Communication Generation process also provides improvements to the storage and retrieval options for communication outputs. With the Communication Generation process, you can:

- Preview the outputs prior to printing or emailing them.
- Store the extracted data and the template information inside the individual communication record.
- Send the outputs directly to a specific printer path.
- E-mail the outputs.
The preview option takes advantage of the PeopleTools Report Manager functionality (also called the Report Repository). It provides a central place to view the individual extracted outputs, and anyone with the appropriate security can access it.

With the Communication Generation process, a View Generated Output link appears inside the Person or Organization Communication Management pages. Clicking the link retrieves the exact output that was created for the ID, which is the template with the extracted data merged into it. The Letter Generation process retrieves some or all of the extracted data but because the process does not store template information in the database, you cannot preview the final output. The final output is instead sent to the individual.

For communications with external organizations, the Communication Generation process accepts a combination of contact names, department names, and location names to identify communication recipients. The External Organization Communication page remains the same, but the new Organization Communication Recipient page enables you to select from more options for the recipient, including:

- All recipients
- Primary designee
- Custom list of contacts (including the contact marked Preferred)

You can also control selection from one or more departments and locations. Prior to this release, recipients were limited to one person, one department, or one location. Now you can send communications to multiple contacts, departments, or locations. If an organization has 10 contacts, and you are not sure who the appropriate contact is, you can send the communication to all 10, select a custom list using the primary contact and the contacts with a specific title such as Director, or allow the system to use the new organization recipient usages to select the recipients. Like the familiar name and address usages in PeopleSoft Campus Community, new organization recipient usages enable you to set up a usage sequence for the system to use to search for the appropriate recipient when no recipient information is entered.

As you begin to explore and use the Communication Generation process, you will undoubtedly want to migrate Letter Generation templates upon which you have come to rely. Four steps are involved in the migration:

1. Create a Data Source to identify the specific variable fields that you want to extract and include in a template.
   The records and fields must be listed in a PS Query or inside an application class.
2. Associate the template with the data source and insert the variable fields where they should go in the text.
3. Create a Report Definition to upload your templates in the database and to define appropriate security and other setup information.
4. Associate the Letter Code with the Report Definition to use.
Because Oracle supports both the existing Letter Generation process and the new Communication Generation process, you can continue to use the existing Letter Generation process while you explore the Communication Generation process and convert your templates.

The Communication Generation process also offers the ability to use checklists associated with multiple administrative functions to produce a single communication. For example, you might combine checklist items from PeopleSoft Enterprise Financial Aid and PeopleSoft Enterprise Admissions into a single communication to improve the professionalism of your communication and to reduce the number of communications that you must produce and track.

In addition to the new Communication Generation process, enhancements to Campus Community’s 3Cs include:

- Improved Person Communication Management and Organization Communication Management component usability.
  
  Base communication data is presented on the first tab. The second tab displays recipient information.

- Enhanced 3C Engine so that you can use the Population Selection process to select the IDs to which you want to assign a communication, a checklist, or a comment.

- New control enabling institutions to select which checklist items to display in Campus Self Service.

**Population Selection**

The new Population Selection process provides the dynamic capability to identify sets of individual IDs or organization IDs or any combination of these user IDs and use the results within other applications. For example, you can use the Population Selection process to gather individual IDs for a select set of students and use those IDs as a basis for assigning those same students to a specified student group. You can use the process to gather IDs for a select set of individuals and organizations and use those IDs to assign a fundraising communication.

The Population Selection process is configurable to your business needs.

- Use a PeopleSoft query, an Equation Engine equation, or a flat or delimited file as a selection tool to control the fields and records the process uses to identify a population.

- Identify how many result rows to return and whether you want users to be able to preview the results before running the process.

- Use contexts to identify the application processes for which your institution wants Population Selection to be available and grant selection tool security to users.
You can use the standard Population Selection group box on relevant run control pages to select the population, view the population, and run the application process.

**Process Student Groups**

Run Control ID: 1p

The Population Selection process enables you to define the selection of IDs to process for a transaction. Select and preview a population before running the application process against that population.

The application processes currently configured to use the Population Selection process in Campus Solutions 9.0 are:

- Admissions and Recruiting - Application/Prospect Delete
- Campus Community - 3C Engine
- Campus Community - Communication Generation
- Campus Community - Service Indicators
- Campus Community - Student Groups
- Campus Community - User ID Replacement Security
- Campus Community - Population Update
- Contributor Relations - Audience/Initiative
- Academic Advisement - Academic Advisement Batch Reporting
- Enrollment Services - Batch Transcripts
- Financial Aid - Mass Packaging selection
- Financial Aid - Mass Repackaging
- Financial Aid - Aid Year Activate
- Financial Aid - Satisfactory Academic Progress

With PeopleSoft Campus Community 9.0, colleges and universities can group contacts by a variety of criteria for more efficient, dynamic, and targeted communications.
- Student Financials - Payment Plan enrollment
- Student Financials - Third Party contract enrollment

**PeopleSoft Query**
PeopleSoft Query is a PeopleTools selection mechanism that enables you to identify selection criteria to select the IDs. Defining a predefined query for this purpose is a familiar process with which you can easily build runtime prompt queries. The Population Selection process is tightly coded to use all the benefits of PeopleSoft Query, including its security. The PeopleSoft Query tool lets you easily run reports to retrieve a list of IDs to process.

**Equation Engine**
The Equation Engine tool enables you to select IDs using complex criteria and to manipulate the data associated with those IDs as they pull the data into the Population Selection preview page. An added value of the Equation Engine is its ability to manipulate the data selected, such as adding together the value of two fields. Security features are built into the tool.

**External File**
The External File tool enables you to upload data from an external file, such as an Excel spreadsheet, map its contents, and provide it to the Population Selection process to select that population. For example, an administrative user can attach a spreadsheet from your Recruiting office, where the applicants for a specific recruiter are listed. The Population Selection process can pass these IDs to the 3C Engine process to assign a communication, checklist, or comment to those applicants.

**Population Update**
To assist in managing and protecting the integrity of your data, in PeopleSoft Campus Solutions Release 9.0, Oracle also delivers the Population Update process. The Population Update process enables administrators to update certain records and fields for defined populations of students.

This new functionality uses the flexibility and control of Population Selection tools. First specify the selection of a population and then select the field values to update or insert for that population.
You have more flexibility in assigning and updating student populations.

In PeopleSoft Campus Solutions 9.0, the Population Update process is configured for the following functional areas:

- **Student Financial Aid Term - Budget Required and Financial Aid Statistics Required fields.**

  The Population Update process enables administrators to define populations of students for whom to reset the value to Assign or No Assign based on the business process requirement.

- **Student Packaging Variables.**

  The Population Update process provides the flexibility to populate variable data fields for specific populations of students deemed necessary but not accessible through the packaging process.

- **Admission Application Recruitment Category.**

  The field Recruitment Sub-category is eligible for batch updating.

- **Person Relationships with Institution - All fields.**

  The Population Update process creates and updates the Person Relationships with Institution record.

- **Packaging Status Summary.**

  Use the Population Update process to tailor your packaging process to meet specific business needs. For example, use the Population Update process to define a unique population for a verification process by updating the INST Verification Status field to Select. Alternatively, use the process to define a population of students who are ready to be packaged by updating the Aid Processing Status field to Ready to Package.
• **Term Activation.**

Population Update provides batch-processing updates of the Tuition Calculation and Eligible to Enroll fields.

• **Student Equation Variables.**

If you use the Student Equation Variables fields to store data that is otherwise inaccessible to the Tuition Calculation process, use the Population Update process to populate these fields for specific populations of students.

For more specific details on the Population Update process for Financial Aid, see the Financial Aid section in this document.

**External Organizations**

External Organization components are rearchitected to streamline data entry and add flexibility. Some of the changes include:

- Effective dating added to the External Organization, Location, Contact, and Department components.
- Contact-type enhancements to enable greater control over communication selections.
- Addition of External System Organization IDs.
- Business process-specific navigation, such as support for External Education and PeopleSoft Contributor Relations.

(For more detail on enhancements to External Organizations for PeopleSoft Contributor Relations, see the PeopleSoft Contributor Relations section in this document.)

**Service Indicators**

Service Indicators (Holds) enhancements include:

- End date and end term consistency
- A mass assignment/release batch process
- Extension to external organizations
- Visibility/display controls
- Security controls

Service Indicators (Holds) were previously used inconsistently within the PeopleSoft Campus Solutions modules, and the absence of clear date controls contributed to confusion in how best to assign and release Service Indicators.

PeopleSoft Financial Aid defined Active Term as the single term for which a Service Indicator was in effect, while PeopleSoft Student Records defined Active Term as the first term for which a Service Indicator was in effect, and it remained in effect until released.

In previous releases, you could not control whether self-service users or administrative users could view a Service Indicator assignment.
Enhancements to the Service Indicators feature correct these limitations. These enhancements include:

- **End Date and End Term with consistent validity logic in processes that react to Service Indicators.**

  All feature implementations of Service Indicators treat date and time periods the same way. Oracle modified the definition of Service Impact to support this functionality by pushing the date-driven functionality of Service Indicators down to the Impact level. Impacts are now categorized as term-based, date-based, or both. The implications are that each process that uses Service Indicators would look at the Impact, determine if the Service Indicator is term-based or date-based, and look at relevant values to determine if the Service Indicator is in effect.

- **Mass Release batch process.**

  Using the new Population Selection functionality, this process enables you to periodically clean up the Service Indicator table by removing Service Indicators programmatically based on a defined expiration criterion, such as End Term, End Date, or a variety of other criteria. The record of the Service Indicator’s existence continues, as it always has, in the Audit record. For example, assume a date-based Service Indicator is in effect. When the End Term date has passed, the online process reads that date and determines if the Service Indicator is in effect. The Service Indicator still appears on the table, but processes observe the dates. The Mass Release process then periodically cleans up the table to avoid confusion in cases where you try to access the Service Indicator to look for an individual.

- **Service Indicators extend to External Organizations for use throughout PeopleSoft Campus Solutions.**

  All Service Indicators in PeopleSoft Campus Solutions are now accessed from centralized tables so that any module can make use of them and all user interfaces are aligned. This centralized setup simplifies and streamlines maintenance of this feature.

- **Mass assigning and releasing Service Indicators.**

  The Population Selection process provides a new way to mass assign or release Service Indicators. When you assign a Service Indicator to a group using the Population Selection process, you can use the same data values as if you were assigning the Service Indicator manually. In addition, you can release or remove a Service Indicator based on a number of criteria, including Service Indicator Code, Reason, Term, and Date value combinations.
• *Visibility into assignments and changes to Service Indicators and enhanced audit capabilities.*

PeopleSoft Campus Solutions 9.0 expands the search criteria available when you are looking for a historical value, such as an individual ID, time, or All, by a Service Indicator code. The Results Set takes advantage of the full grid capabilities through standard PeopleTools functionality.

• *More granular security controls for Service Indicators.*

You can control the display of specific Service Indicators to self-service users. You control this at the Service Indicator level by using a check box to indicate whether the indicator should appear in self service. The system no longer limits display to negative Service Indicators. Though Service Indicators that appear in self service are labeled *Holds,* positive Service Indicators can also be set for self-service access.

• *Ability to display or hide the Service Indicator on administrative pages based on roles.*

Previously, if you had access to the Service Indicator page, you could see all the Service Indicators. With PeopleSoft Campus Solutions 9.0, your security determines which indicators appear on the Manage Service Indicator page. A new setup page enables you to define the roles that can view which Service Indicators for which institutions. If a Service Indicator does not have any defined roles for display security, the system assumes all roles can view it. For example, in PeopleSoft Contributor Relations, an individual could have a positive Service Indicator due to a significant relationship with or contribution to, the institution. Your institution might consider the contributor’s information to be sensitive and want to limit visibility. This new security capability enables you to define the Service Indicator as viewable by role so that only certain staff members with that role can see it.

**Self Service**

Building on previous improvements to the user experience, new display and controls are delivered in PeopleSoft Campus Self Service including:

• A Personal Data summary page, modeled on the Student Center design.

• Configurable display of Service Indicators (Holds) and Checklists (To Do List).
The new Personal Data Summary page provides improved one-stop navigation to personal data within PeopleSoft Campus Self Service.

### Personal Data Summary Page

Self-service users can access the Personal Data Summary page directly, or they can click links in the Personal Information section of the Student Center page to access multi-tabbed components that correspond to the group box headings on the Personal Data Summary page. Either way, individuals can view their existing data and update it as necessary.

Any person authorized by your institution can use this page, not only students. You might even find that the Personal Data Summary page is more useful for non-students because students can easily access the same transactions and information directly from the Student Center. If you use PeopleSoft Enterprise HRMS application, you can even consider granting employees access to this page or move the components to another menu if you decide it would add value to your existing configuration.

### Configurability

As is the case with all of PeopleSoft Campus Solutions 9.0, Oracle’s goal is to provide configurability, reduce the need for customization, and enhance user experience.

To that end, Oracle provides the Personal Data Summary Options page so that administrative users can configure how to display the Personal Data Summary page to your self-service users. They can:

- Configure the type of address, phone, and email address to display, in what order they are to appear, and specify the labeling for the information.
- Control the number of Service Indicators (Holds) or Checklists (To Do List) to display, and whether to display the monetary values for holds.
Conveniently accessible summary pages enable easy updates.

PEOPLESOF O RECRUITING AND ADMISSIONS 9.0

Higher education institutions continue to face increased global competition for recruiting and retaining students, a sea change for education that demands better tools with increased capabilities to build relationships with prospects, monitor progress, and measure the effectiveness of multiple and complex programs and interactions with prospective and accepted students.

Academic Program, Plan, Subplan Deactivation Control

Institutions need the ability to adapt to changes in curricula, resources, and demand. Administrative systems must accommodate that adaptability as well. As academic programs change or terminate, institutions need a way to continue to manage the previously offered programs in which students are active and continuing to complete requirements. At the same time, these structures must be discontinued so that they are not used to recruit new students or applicants. Oracle provides a feature that enables you to deactivate structures for use in admissions and recruiting. However, the feature includes the ability to keep academic programs, plans, and subplans.
Managing student activity in programs no longer offered to new admissions.

In past releases, when academic programs, plans, and subplans became obsolete, traditional Effective Date use and Effective Status deactivation prevented using them throughout the database. With PeopleSoft Campus Solutions 9.0, these values remain active for current students, but no longer appear for admissions processing. For example, when an admissions application is being processed, if the Last Admission Term value is less than the Admit Term value entered on the application, the program, plan, and subplan values do not appear as valid options.

This new functionality impacts the following:

- **Transaction pages**: Add Application, Quick Admit, Maintain Applications, Program Additions, Action/Reason Entry and Define Enrollment Targets, Transfer Credit Modeling, Academic Program Table, Academic Plan Table, and Academic SubPlan Table.

  Also, the application prevents users of the Student Program/Plan component in Student Records from adding discontinued programs, plans, and subplans.

- **Processes**: Application Status Update, Activate Applicants, Assign Alternate Evaluation Codes, Alternate Program Additions, Academic Program Data Entry and Update, Recruiter Linking, and Add Prospects.
• **Batch application**: Batch application processing incorporating this new functionality into their logic includes TS 189.

### External Education Component

Data entry and external course management in preparation for transfer credit processing and evaluation analysis are critical activities for most admissions operations. The reconfiguration of the External Education component makes it a more efficient data entry tool for end users. The redesign takes advantage of the newest technical capabilities available and adds functionality.

The extensive redesign includes the following features:

- The number of pages in the component is reduced to three.

  Instead of moving from tab to tab, you can use fewer pages for data entry. Each page contains expandable grids for external transcript summaries and the ability to compile information on external subjects, courses, and degrees. These grids enable you to customize the order of fields, sort fields, insert multiple rows, download grid content spreadsheets, and find specific text.

- The tracking of external transcript status information is streamlined for easier maintenance.

- There is better usability for the data entry of external courses.

  You can apply enhancements that improve and add user-defined default values at the click of a button.

- Free-form comment fields at the transcript level and at the individual external course level include a set of predefined comments that you can change or augment.

- As external course data is recorded, grade changes may occur.

  The system automatically stores these changes and enables you to access courses through individual links.

- Typically, external course data is directly related to transfer credit evaluation.

  For each recorded external course, there is now a link that indicates the transfer status of the course to the user. In addition, a link to the Transfer Credit Course Credits component provides quick access to transfer credit modeling.

- Because international processing of external courses is a growing need, the External Education component now has a Regional page for additional country-specific functionality.

- In order to save time, an institution can use the Student Center feature.

  This feature enables students to enter external courses for transfer modeling. Once a student has entered the data, an administrator can review courses on a separate page and decide which courses to import into the External Education component.
Admissions administrators and students can better track and manage transfer credits.

Prospect and Application Deletion Process

Most institutions face the challenge of managing increasingly large and complex databases. As the number of prospects and admission applicants grows, so does the need for a more automated method of deleting records when they are no longer necessary. The ability to delete an individual prospect or application has been a delivered feature in previous releases. In PeopleSoft Campus Solutions 9.0, you can now delete groups of prospect and application records using a new batch process.

This new feature includes:

- Two new processes (one for prospects and one for admissions applications) that enable you to use the Population Selection process to designate a group of prospects or applications for deletion.

  This process loads the set of prospects or applications into a holding table so that the final deletion process can be run.

- Two convenient transaction tables in which you can specify which prospects or applications are to be deleted by inserting multiple rows. These components are completely redesigned for better usability.

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Subject</th>
<th>Course Name</th>
<th>Units Taken</th>
<th>Grade</th>
<th>Term</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>MATH 101</td>
<td>College Algebra</td>
<td>3.00</td>
<td>B</td>
<td>Fall 2005</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>FNL 101</td>
<td>Spanish 1</td>
<td>3.00</td>
<td>A</td>
<td>Spring 2005</td>
<td>Regular</td>
<td></td>
</tr>
</tbody>
</table>
Delete An Application

<table>
<thead>
<tr>
<th>Application Number</th>
<th>ID</th>
<th>Name</th>
<th>Delete Communications</th>
<th>Delete Checklists</th>
<th>Delete Completely</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 00024372</td>
<td>BRT00001</td>
<td>Dead Lastrow</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>2 00024372</td>
<td>CDD00004</td>
<td>Alan Simpson</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>3 00024372</td>
<td>CDD00004</td>
<td>Jim Brack</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>4 00024372</td>
<td>CDD00004</td>
<td>Amy Brack</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>5 00024372</td>
<td>CDD00004</td>
<td>James Brack</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

Improved process for deleting prospects and applications to keep data current.

- In the redesigned Prospect Delete Holding and Application Delete Holding components, the record, once marked for deletion, is accessible. These components also enable you to change the 3C delete options and to remove the prospect or application record from the holding table.

- The redesigned delete process no longer requires you to remove an application number from a prospect record before a prospect or application can be deleted.

PEOPLESOF T STUDENT RECORDS 9.0

Processing and maintaining student records is more than an efficient automation of the management of student information. Institutions today are facing the complex and sometimes conflicting demands for more security around access to student data and the need to improve an authorized user’s experience to access the information that they need, when they need it. In addition, institutions are also looking for more flexibility in the ways that they maintain and deliver records and the way that they manage access to student information and self service in a fast-changing, competitive, global environment.

With PeopleSoft Campus Solutions Release 9.0, Oracle has increased flexibility, improved rule- and role-based access control, enhanced the student user experience, and boosted the capability of an institution to effectively manage the critical student information processes.

Self-Service Usability: Student and Faculty Centers

While the introduction of the Student and Faculty Centers feature in PeopleSoft Campus Solutions 8.9 was well received by users, functionality in this latest release supports new capabilities, responds to customer suggestions, and adds operational improvements.

Faculty Center Enhancements

Enhancements to the Faculty Center include:

- Student photos on rosters
- Restricted grade values
- Ability to view final exam schedules

PeopleSoft Student Records enhancements include:

- Flexible transcripts
- Academic progress tracking
- Improved self-service experience
- Student group flexibility
- Improved class permissions management
Including Student Photos on Rosters

Many institutions want to supply faculty with photos of students to accompany names on rosters. In PeopleSoft Campus Solutions 9.0, institutions can configure class rosters and advisee rosters so that they contain access to student photos. When an instructor accesses a class roster, a Student Photograph icon appears next to each student on the roster. If needed, the Photo Roster button enables faculty to view the roster with all photos displayed.

<table>
<thead>
<tr>
<th>Enrolled Students</th>
<th>Customize</th>
<th>Find</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Name</td>
<td>Grade</td>
</tr>
<tr>
<td>1 S12206</td>
<td>Klambo, Charal</td>
<td>Graded</td>
</tr>
<tr>
<td>2 S12201</td>
<td>Keshich, Khanam</td>
<td>Graded</td>
</tr>
<tr>
<td>3 S12202</td>
<td>Lance, Jovit</td>
<td>Graded</td>
</tr>
</tbody>
</table>

Icons to access student pictures and high-level academic information

Restricting Grade Values

Institutions that deploy the Faculty Center Grade Roster feature to faculty have asked that certain grades become unavailable for editing by faculty. An example is an administrative grade like a W, which is assigned only when a drop is processed. The result is reduced confusion and administrative processing.

Viewing Final Exam Schedule

In PeopleSoft Campus Solutions 9.0, faculty members can now view their schedules of final examinations in an easy-to-read grid.

Links to view schedules in a weekly format.

For more functional enhancements, see the Advisement Information for Advisors in the Academic Advisement section.
**Student Center Enhancements**

Enhancements in the Student Center include the following processes:

- Navigation
- Student Grades in Self Service
- Searching for Classes and Courses
- Setup to Support Class Searches
- Shopping Cart
- My Academics Tab
- Student Center Weekly Schedule
- Configuration Options

**Navigation**

The Academics section of the Student Center includes design changes that allow for easier navigation and support extended enrollment functionality. Students can navigate directly to search for classes or courses, plan courses, enroll in classes, and view academic information. Each of these locations is organized with subtabs that are associated with pertinent transactions. For example, the Enroll tab contains specific tabs that take the student into transaction steps for adding, dropping, swapping, and editing classes. Methods for finding classes for enrollment are located on this page and include entering a class number or selecting Class Search, or searching from My Requirements or My Planner.

For additional information about My Requirements and My Planner, see the Academic Advisement section.
Student Center enhancements

**Student Grades in Self Service**

In addition to viewing their final grades, students can now view midterm grades. The redesigned View My Grades page now has convenient tabs that enable students to view one or more midterm grade sets, to include a student’s term academic standing, and to recognize service indicators that prevent a student from viewing grades. This increased usability benefits the student by providing readily available information.

### Students' view of midterm grades
Searching for Classes and Courses

The new Search link and tab contain the search engine for scheduled classes in a term. In PeopleSoft Campus Solutions 8.9, students used criteria like meeting time, campus, and meeting days. PeopleSoft Campus Solutions 9.0 adds the ability to search for class sections based on a range of credit units. Students who might be looking for a class meeting on Tuesday evenings for three credits can now easily search using a combination of values.

Also located in the Search tab is the Browse Course Catalog engine. Currently, students can browse for a course in the course catalog (instead of searching for specific classes in a term). In Campus Solutions 9.0, students can select a course to include in a planner or search for scheduled sections of a course in a specified term.

Setup to Support Class Searches

Most institutions desire the ability to limit the term values that appear for class searches on both the Student and Faculty Center pages. In order to support configurable control of class searches, enhancements have been made to both the Term Values component and the Self-Service Student Center Setup Component Class Search page. The latest release now includes a display area in the Class Search tab in the Term Values component. For each term value defined on the Term Values component, you can define two date ranges to appear on class searches performed on the Student Center or on the Faculty Center. This feature enables institutions to control when a term value begins to appear and when it no longer appears. It also allows for these date differences to be applied to students and faculty. The design of the Class Search page has been updated to follow this same granularity. The system displays optional class search options so that institutions can flag them for use on the Student Center, Faculty Center, or both.

Shopping Cart

PeopleSoft Campus Solutions 9.0 redefines the concept of an enrollment Shopping Cart by adding more functionality. The Shopping Cart is part of the planning tools found under the Plan tab. Students can use it to build a term class schedule that the enrollment engine can validate for use without actually enrolling students in classes. (This functionality was introduced in PeopleSoft Campus Solutions 8.9 as the Wish List.) Courses in the Shopping Cart are saved for use until the student is ready and able to enroll. The Shopping Cart is populated with courses from My Academic Requirements and My Planner. At the suggestion of many customer institutions, when a student places a class or classes in the Shopping Cart from these pages, a message appears that instructs the student to enroll. In this way, a student is informed of additional necessary steps.
The contents of the My Academics Tab provide students with a convenient launching point to degree audit information, advisement what-if functions, transfer credit, course history, transcripts, enrollment verification, and graduation. This tab also contains the student's academic information for convenient reference.

The weekly schedule on the Student Center is now easier to use. Buttons quickly move students from week to week. The weekly schedule recognizes holiday schedules and term/session beginning and ending dates. The list view of the schedule includes a printer-friendly version link for convenient printing from the student’s browser.

Configuration option enhancements enable institutional control over defining the Student Center tabs to suit their unique requirements. These enhancements include a navigation tabs setup component that enables the definition of the main Search, Plan, Enroll, and My Academics tabs, as well as the sequence and label message of the tabs and definition of secondary or subtabs.
Flexible Transcripts

Most institutions want to easily and efficiently produce academic transcripts for their students. In PeopleSoft Campus Solutions 9.0, Oracle has redesigned transcript request, generation, and processing to support greater adaptability, control, and flexibility.

Enhancements to Transcript Production

Academic transcript production in PeopleSoft Campus Solutions 9.0 now includes new, more adaptable, and more efficient technology. A new Application Engine process replaces the original COBOL-based engine traditionally used to generate transcripts after they have been requested. A better, hierarchical table structure containing extensive fields for greater flexibility is now available. Oracle’s XML Publisher is delivered as the application that produces the transcript document. This powerful reporting tool is built on open standards technology and supports multiple output formats. One of the advantages of using Oracle’s XML Publisher as the reporting tool for transcripts is its use of templates so that institutions can design the look of the finished document. Two predefined transcript templates are also delivered: a portrait and a landscape orientation. Transcripts are available in PDF format to administrators and also to students using self service.

Processing Batch Transcript Requests

Most institutions produce transcripts for many purposes. In PeopleSoft Campus Solutions 9.0, batch processing of transcripts is streamlined and designed for greater flexibility.

A new run-control component for processing batch transcripts enables you to create a transcript request, generate the transcripts from that request, and print the transcripts from a single location. This improved usability streamlines this end-to-end process.

In order to deliver a flexible way for you to select batches of transcripts, Population Selection is included in, and applied to, transcript processing. (For more details, see the Population Selection section of this document.) The Population Selection process enables you to use PS Query, External File upload, or the Equation Engine to create specific groups of students for whom to order transcripts. In addition, you can create a population or augment results by using a Student Select List section that enables you to insert individual rows of IDs as necessary. There are several advantages to this feature. First, it enables you to create and control specific selection and sort criteria for a set of transcripts. Second, it displays an Edit Prompt link so that you can select run-time prompts. Third, it enables you to preview the populations for which transcripts are to be generated.
Streamlined, flexible transcript processing is now available.

Transcript Type Component Enhancements

Defining the contents, design, and form of the many transcripts that an institution can issue remains the function of the Transcript Type component. However, to support the increased flexibility required by institutions, PeopleSoft Campus Solutions 9.0 delivers significant additions to the Transcript Type component.

To support more efficient setup, there is a new page called View Sort. The contents of this page display, in a single location, which transcript data has been selected to appear, in what location it will appear, and in what sequence it will appear in relation to other information.

A Test Scores page provides an easy way to include test data on a transcript. You can select from any of the valid tests that an institution has defined for display.

A Special GPA page enables defined special grade point averages, such as Academic Program and Plan GPAs that have been assigned to students, to be included on a defined transcript for a term.

Options for additional fields to include when defining transcript type are Contact Hours for each class and Academic subplans (concentrations or specializations).

Transcript Request Inquiry

When students or alumni request transcripts to be forwarded to other institutions, internal departments, external employers, or other recipients, administrators frequently need to access a single source of information about the transcript request that indicates status, pertinent dates, recipient information, and request circumstances. The Transcript Request Inquiry component for PeopleSoft Campus Solutions 9.0 represents a quick and convenient way for staff to find this information. In a readable grid format, the Transcript Request Inquiry enables you to access the student’s history of transcript requests, filter them by transcript type, sort the results, and personalize the sequence of grid columns.
A more flexible Class Permissions process enables better service while maintaining the ability to track, monitor, and manage the process.

Class Permissions

The Class Permissions feature received a major redesign in PeopleSoft Campus Solutions 9.0. The Class Permissions enhancements enable class administrators to specify the conditions under which a class number can be overridden. In response to suggestions from customers, a class permission number or a set of permission numbers are configured to override:

- Closed class section
- Requisites not met
- Required consent
- Career restrictions
- Time period restrictions

With this new design, single-class permissions are configured to override a class section closure or any combination of restrictions as necessary. The permission expiration dates feature is also set for each permission number. This granularity is accomplished by the provision of a new page where you can specify various attributes for each class permission number. A convenient set of defaults is assigned for efficient data management.

In addition, on the page for creating class permissions, information about when and by whom a permission is issued, can be recorded. You can also save comments about the permission.
Enhancements in PeopleSoft Campus Solutions 9.0 include greater flexibility in granting and overriding class permissions.

Academic departments also need to control permission-to-drop class sections. A new value for Drop Consent is available for the Course Catalog and the Class Associations components so that you can configure class sections for this need. A new page, Permission to Drop, in the Class Permissions component, is dedicated to this type of consent. Permission to drop a class is configured to override the required consent to drop, existing corequisites, or the session drop time period. A convenient feature of the Permission to Drop page is the option of generating class numbers for students who are already enrolled in the section.

Administrators can override defaults to add or drop classes.
While the permission-to-drop feature can restrict students from dropping individual class sections, many administrators have the additional need to control a student from dropping any class during a term. There is a new service impact, which, when attached to a service indicator that is assigned to a student, prevents the student from dropping any enrolled class without administrative override. The service impact, No Drop Activity - Add Allowed (DENR), is available for this purpose.

**Usability and Security for Student Groups**

Most institutions use Student Groups throughout PeopleSoft Campus Solutions for setup reporting, as well as for tracking and controlling transactions. New security options accommodate the creative ways in which institutions use and access student groups. New viewing components are intended to support administrative maintenance and management practices.

Student Group assignment continues to be supported by a transaction component in which functional users can manage student group information for individuals. In PeopleSoft Campus Solutions 9.0, you can assign student groups in two additional ways.

1. Use a new component to insert multiple rows of individuals and run a process to assign them to the selected Academic Institution, Student Group, and default Comment values.

**Process Student Groups**

![Screen shot of process student groups](https://example.com/process-student-groups.png)

Easily insert multiple students and assign them to a group.
2. Use the Population Selection application to select a PS Query, an External File, or the Equation Engine to create a group, specify assignment values for that group, and run an assignment process.

**Process Student Groups**

Run Control ID: 10b

### Population Selection

- **Selection Tool**: PS Query
- **Query Name**: ORAO_OSO

### Student Group Data

- **Academic Institution**: PeopleSoft University
- **Student Group**: HIST: Historical Preservation Society
- **Effective Date**: 2010-01-01
- **Effective Status**: Active
- **Comment**: Student no longer doing research in Historical Society

Easily insert multiple students and assign to a group.

PeopleSoft Campus Solutions 9.0 provides two new methods of viewing student groups and their members. One, administrators can use an online listing of student group members, as well as associated links to access the transaction page for data entry. Two, a useful listing of Student Groups that has been defined for an institution, also has online availability. Both components have available filters that provide high-level criteria to aid in selecting what lists to view.

PeopleSoft Campus Solutions 9.0 also provides significant improvements to student group security access. New, configurable security provides the ability to control whether you can view and update, view only, or have no access to an individual’s student group assignment. A new setup table controls these user settings for the student group values at an institution. This more granular security setup should result in greater control of sensitive student group data.

**Student Group Security**

- **User ID**: SSID_00022
- **Name**: Smith, Doug
- **Institution**: PeopleSoft University

You can secure access to student group views.

PeopleSoft Campus Solutions 9.0 continues to offer the time-saving User Security Replacement component but updates the component with an option for Student Groups. Security administrators can identify the security configuration for an existing user and assign it to another user. A Mass User Security Replacement process enables a security administrator to select a group of users using Population Selection functions and set user security for select areas using a batch process.
Enhancements to improve the academic planning and advising process include an enrollment backpack and new what-if capabilities.

### Academic Advisement

PeopleSoft Campus Solutions 9.0 delivers the next level of student self service with the important integration of Academic Advisement and Enrollment to the Student Center. Enrollment functions on the Student Center are organized into tab options that include searching for courses and classes, planning to take courses in the near and long term, enrolling and maintaining term class schedules, and reviewing academic information and progress. This integration provides students with accurate and timely information that has direct application for academic planning and enrollment.

This release also delivers enhancements to the advisement what-if capabilities. Using the what-if advising capabilities, you can run a simulated advisement report for a student that shows degree progress based on courses that the student proposes to take. You can also run a simulated academic advisement report based on simulated careers, programs, plans, and subplans.

### The Enrollment Backpack: My Academic Requirements

PeopleSoft Campus Solutions 9.0 enhances the foundation delivered with Student Center enrollment functions in PeopleSoft Campus Solutions 8.9. The foundation now includes an extensive set of web pages that are structured with a usable tab design. At the core of this functionality is the My Academic Requirements page, which provides extensive academic information and transactional capabilities. In previous releases of PeopleSoft Campus Solutions, this report was an online version of the printed degree audit that many institutions found to be difficult to use. Like the degree audit report, My Academic Requirements provides a detailed analysis of the student’s progress toward satisfying academic goals as they are recognized by the rules in an institution’s Academic Advisement setup. However, its easy navigation provides students with the data that they need to make informed decisions about class enrollment. A student can quickly decide which course or courses are needed to satisfy an academic requirement and then click buttons and links to explore course content, examine schedule alternatives, and select scheduled class sections for enrollment directly from this online interactive display.

Enhancements to requirement descriptions and to course properties also support this new design.

Institutions can benefit from some additional setup options that control the circumstances under which an updated view of the My Academic Requirements page is generated and whether it is accomplished in real time or by batch processing.

The Installation Academic Advisement Component has 10 flags that control the circumstances under which a new My Academic Requirement is marked for processing.
Sample report showing academic requirements academic progress information.

Using another planned component, the institution can identify whether it wants the degree progress report to be generated in real time or by batch process. If the institution wants to control the frequency with which the online report is generated, it can use new delivered batch processes to generate advisement reports. Using batch processing can improve performance.

Advisement Report Synchronization Options

Select the functional areas listed below to set the synchronization flag for a student if any changes occur to their records in the functional area. Adding, modifying, or deleting any records within a selected functional area will trigger the setting of the synchronization flag for the student.

- Enrollment Records
- Transfer Credit Records
- Internal Degree Records
- External Degree Records
- Student Planner Records
- Academic Structure Records
- Student Group Record
- Academic Level Records
- Milestone Records
- Shopping Cart Records

Options to enable batch processing and updating of records.

Any time a new My Academic Requirements online report is generated, a time/date stamp marks it so that the student knows when it was last created.
**Enrollment Backpack: My Planner**

The other major element of the Enrollment Backpack is the My Planner feature. This feature provides students with the ability to plan courses on a short- or a long-term basis and to directly enroll in planned classes as terms become available. Students can easily select courses for their planners using the catalog browser and access My Academic Requirements to select courses based on academic requirements.

Courses in the planner appear primarily on a term-by-term basis but can be kept in an unassigned area for later consideration. Course information is available directly through a course title link, and prerequisite information is prominently noted and available. Information on when courses are typically offered is configured and appears for each course. Students can easily change planned courses, assign them to different terms, or delete them from their plans. Planned courses that have been inactivated by the institution are marked as such. The courses in My Planner are readily and easily usable for enrolling in a term. Planned courses are marked as such and appear in My Academic Requirements, in the Course History page, and during the enrollment process.

Enabling students to easily plan their courses.
Two additional tabs are also available for the planning function. The Shopping Cart tab enables a student to select classes for a specific term, validate them without enrolling, and when ready, enroll for the classes directly. The Shopping Cart is populated from My Academic Requirements or from My Planner. The course history tab provides a convenient online reference for students that produces a configurable list of all of the courses that a student is currently taking, has taken, has transferred, and has planned.

<table>
<thead>
<tr>
<th>Course</th>
<th>Description</th>
<th>Term</th>
<th>Grade</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANTHRO 211</td>
<td>Introduction to Anthropology</td>
<td>2006 Fall</td>
<td>3.00</td>
<td>✅</td>
</tr>
<tr>
<td>ANTHRO 101</td>
<td>Introduction to Anthropology</td>
<td>2006 Fall</td>
<td>0.00</td>
<td>⭐️</td>
</tr>
<tr>
<td>ANTHRO 102</td>
<td>Intro to Anthropology</td>
<td>2007 Spring</td>
<td>3.00</td>
<td>⭐️</td>
</tr>
<tr>
<td>ANTHRO 203</td>
<td>Early People</td>
<td>2006 Fall</td>
<td>3.00</td>
<td>⭐️</td>
</tr>
<tr>
<td>ANTHRO 205</td>
<td>Advanced Culturations</td>
<td>2006 Fall</td>
<td>0.00</td>
<td>⭐️</td>
</tr>
</tbody>
</table>

The Course History feature

Program Guide

Most of the functionality already described requires that you implement the Academic Advisement module. However, there are some institutions that may not want to implement Academic Advisement or may be planning to do so in the future. Either way, these institutions can still offer their students the advantage of some of the powerful self-service functions by using the features of the Program Guide.

The Program Guide enables an institution to set up course lists, attach the course lists to requirements, and build requirement groups. Intended to be a simple setup, it does not carry the overhead found in the Academic Advisement setup.

The Program Guide includes the following enhancements:

- A special advisement usage automatically associated with course lists and requirements.
- An option to set up a database to support Academic Advisement or Program Guide features on the Student Administration Installation Table.
- Program Guide Requirements and Requirement Groups to recognize the academic structure and apply it to students when in use.
- Definitions using one or more course lists and providing extensive descriptive qualities but without the same complex intelligence or degree audit capabilities.
- Visibility on self-service pages with course links associated so students can choose them for enrollment and for use in the My Planner feature.
• Listing courses in My Academic Requirements as taken or planned.  
(However, because no analysis is done, requirements are not expected to 
appear as satisfied or unsatisfied.)

While the Program Guide is not a replacement for the Academic Advisement 
module, it offers a sound alternative so that students can still use the online planner 
and enhanced enrollment functionality in PeopleSoft Campus Solutions 9.0.

**Advisement Information for Advisors**

Most institutions view the important relationship between student and advisor as 
critical to academic success and retention. To give advisors direct information 
about their advisees’ progress, plans, and other pertinent information, a new 
component is dedicated solely to supporting the advising process. In PeopleSoft 
Campus Solutions 8.9, this component was a tab on the Faculty Center; however, it 
is now a separate, information-rich area that is available via a link from the Faculty 
Center. An advisor can see a full list of advisees, select one, and view a modified 
version of the advisee’s initial Student Center page with access to the student’s My 
Academic Requirements and My Planner. In addition, advisors can easily access 
general, transfer credit, and other academic information.

**Academic Advisement Reporting**

In PeopleSoft Campus Solutions 9.0, a new run-control component is dedicated to 
the production of advisement reports. The Advisement Report Request component 
processes reports for individual students. A Batch Advisement Report Request 
delivers the extensive flexibility of Population Selection to create ad hoc lists of 
students.

**Generate Report Requests**

[Image of the Generate Report Requests interface]

The Population Selection feature in batch advisement report requests is used to create 
ad hoc lists of students.
After entering specific parameters on the Advisement Report Request, you can click a process button and are presented with a preview of the student’s advisement report. If a printed copy is required, you can request a PDF version of the report or send the report to a printer. An advantage in both the individual and batch processes is a new field called Request Identifier. A user-defined value enables a report or set of reports to be marked with a common value for later processing in one batch. Instead of having to remember request IDs, an advising administrator can simply enter an intuitive Request Identifier and run multiple advisement reports that have been marked with the same value. The Batch Advisement Report Request also offers this same functionality.

Advisement Reports themselves are enhanced to take advantage of the functionality provided by Oracle’s XML Publisher reporting tool. Output is fully integrated with the advisement engine and provides reports in PDF format for improved readability.

**Academic Data Enhancements**

PeopleSoft Campus Solutions 9.0 includes several enhancements to academic progress metrics in the areas of grade point average, unit calculation, repeat checking, and transfer credit grade recording.

**Term and Cumulative Statistics and Grade Point**

Many institutions separate and use credits and grade point averages earned externally (transferred) from those earned internally. PeopleSoft Campus Solutions 9.0 adds several new fields and redesigned pages for easier use and display.

For each student, for a term or on a cumulative basis, it is possible to track the following:

- Term GPA for Transfer Credits
- Term GPA, which combines Transfer Credits and for Institution Credits
- Cumulative GPA for Transfer Credits
- Cumulative GPA for Institution Credits
- Cumulative Units contributing to the Transfer Credits GPA
- Cumulative Grade Points contributing to the Transfer Credits GPA
- Cumulative Units contributing to the Institution GPA
- Cumulative Grade Points contributing to the Institution GPA
Enhancements to student data make it easier to access and view term statistics for an individual student.

The Term History - Term Statistics page is redesigned. It now displays new fields and is more readable. A new Enrollments group box indicates what has been earned for a term at the institution. Term transfer credits appear, and a Total group box shows how both are combined. You can easily see how all totals and GPA calculations have been made.

The Term History - Cumulative Statistics page is also redesigned to accommodate new fields and is more readable. The Enrollments group box indicates what the student has cumulatively earned at the institution, with transfer credits displayed. A Total group box shows how both are combined to give a cumulative picture of units and grade point average as of the term that appears.
Enhancements to student data improve the way cumulative statistics for an individual student are accessed and appear.

Institutions often vary in the way that they create grade point averages. To accommodate these variations in rounding and truncation, there is now a high level option on the Student Records Installation component that enables easy setup.

**Student Records Installation**

The new release provides more flexibility in the way institutions can calculate grade point averages.

The GPA Rounding/Truncating Option determines how a grade point average appears in the Term History and related components. For example, if you select the Round to 2 decimal places option, the GPA of 2.438 appears as 2.440 on the Term History component pages. If you select the Truncate to 2 decimal places option, the GPA of 2.438 appears as 2.430.
Repeat Checking
PeopleSoft Campus Solutions 9.0 includes two enhancements aimed at making the repeat engine more useful. With the introduction of new online advisement and enrollment features (see the Enrollment Backpack section), in-progress classes being repeated are accurately evaluated and displayed. There are also refinements to the basic logic used in matching multiple class repeats.

Repeat Classes on the Academic Advisement Report
As students are asked to take responsibility for planning and completing classes, accurate academic information must be available. In PeopleSoft Campus Solutions 9.0, enhancements to advisement reporting are planned in order to apply repeat engine capability to classes in which students are currently enrolled. This enhancement provides students who are repeating classes with real-time information about their progress as it relates to those repeated classes.

In order to accommodate this important planned functionality, in-progress classes are assigned a default grade. The repeat engine uses the value from the new Default AA What If Grade field on the Grading Basis page. When this field is populated with the best grade possible for the Grade Basis, the repeat engine can analyze an in-progress course to allow advisement to properly evaluate a class.

When an advisement report is processed and recognizes in-progress classes for a student, the repeat engine uses the defined default grade to evaluate and apply an appropriate repeat rule. An important advantage of this redesign is that a student or administrator can have immediate information as to the proper earned units for progress towards a degree or other credential.

Repeat Logic Extended
Institutions have various policies for recording repeated courses for students. Some institutions take advantage of functionality that allows classes to be repeated more than once with a limitation on the number of repeats. Currently, in the case of multiple repeated classes, the repeat engine’s basic logic seeks and matches the pairs of classes with the best, earned grades. For example, a student might take the repeatable course Piano 205 and earn grades in the following term sequence:

Fall, 2003: Piano 205 Grade: B
Fall, 2004: Piano 205 Grade: F
Fall, 2005: Piano 205 Grade: A

If institutional policy limits the repeat to two times, on the third repeat of the class, the repeat engine evaluates the repeats so that the Piano 205 with the earned grade of A is matched to the Piano 205 with the earned grade of B. The class with the B grade is assigned the repeat code and is not used in the GPA calculation. The Piano 205 with the earned grade of F is used and this may not satisfy the student.
As a solution to this situation, a new setup option field called Grade Match Option has been added to the Institution Table. The Grade Match Option field has two delivered values: Best Grade and Worst Grade. If the institution selects the Best Grade value, the course with the worst grade is ignored. Using the previous example, the repeat engine matches the Piano 205 with the A grade with the Piano 205 with the B grade and does not use the B grade in a GPA calculation. However, when the institution selects Worst Grade, the class with the A grade matches with the Piano 205 with the F grade and the repeat engine does not use the F grade in a GPA calculation. This accommodates a result that is satisfactory to both students and administrators.

**Transfer Credit External Course Grade Setup**

Institutions that recognize and use grades from external transfer credit courses need flexibility when creating equivalency rules that determine how those grades are assigned. In PeopleSoft Campus Solutions 9.0, new setup values provide flexible options when defining which external grades are used for many-to-one and many-to-many equivalency rules.

In order to provide this functional adaptability, there is a new Default Grade field in the Internal Equivalent group box on the Subject Area Elements page of the Transfer Subject Area component. This field provides three setup options for defining how external grades are used in the equivalency. The options are By Grade Order, By Incoming Course, and By Transfer Equivalency Setup.

The By Grade Order option recognizes the number of external courses that are defined for the rule and dynamically assigns a rank order for defining the grades being accepted for internal use. If there are three external courses, the values are highest, 2nd highest, 3rd highest, up to a maximum of ten.

The By Incoming Course option recognizes each external course and dynamically creates a value for each. You can then define the equivalency rule using the grade or grades for each external course.
The By Transfer Equivalency Setup option assigns each internal course in the rule the default grade specified in the rule’s Program Source Equivalency.

For a one-to-one equivalency and a one-to-many equivalency, the only available Default Grade values are By Incoming Course and By Transfer Equivalency Setup.

PEOPLESOFr STUDENT FINANCIALS 9.0

PeopleSoft Campus Solutions 9.0 Student Financials includes a number of enhancements that are in direct response to customer requests and feedback on current processes. With this release, Oracle has built out its eCommerce and self-service capabilities, as well as focused on overall usability of the applications.

Late Fee Processing

PeopleSoft Campus Solutions currently supports the calculation and assignment of late fees for delinquent student receivables. The current process is detailed and compares the date that an individual item was satisfied to the due date for that item. However, due to payment swapping and the application and reversal of financial aid funds or payment plans, the date that an item was satisfied can change, resulting in changes to the Late Fee calculation.

After much discussion with its customers and Product Advisory Group, Oracle provides a new Late Fee process. This process simplifies the overall process and provides enhanced control and flexibility so that institutions can better manage their student receivables.

The new process:

- Compares the amount due from the most recent billing record with the amount of payments or credits on the account. If the payments or credits are less than the amount due, the student is assessed a late fee.
- Enables the institution to define which payments and credits are considered in the calculation, using Item Type tree nodes.
- Enables the institution to define a threshold amount so that if the unpaid balance is less than this amount, the student is not assessed the late fee.
Payment Plans and Third-Party Contracts

As tuition costs have risen and financial aid and scholarship funding have proportionally diminished, many students and institutions turn to payment plans to assist students and families pay their educational expenses. Similarly, more and more institutions seek to expand their markets and their revenue opportunities by developing academic programs and class schedules targeted to working adults and corporate training programs. To support these programs, institutions need more automation and flexibility in managing alternative payment plans and third-party contracts and to accommodate direct billing to a student’s employer.

To help institutions manage their payment plans and third-party contracts, Oracle delivers enhanced functionality that is primarily focused on assigning students to the plans and contracts, managing the plans and contracts from one period to another, and enabling students to self-enroll in a payment plan via self service.

Enroll in Payment Plan

1. Select Payment Plan

You are eligible to enroll in the following payment plans. You will need to follow the 4-step process for each payment plan you elect to enroll in.

<table>
<thead>
<tr>
<th>Payment Plans</th>
<th>Maximum Amount</th>
<th>Number of Installments</th>
<th>First Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service Demo</td>
<td>5,000.00</td>
<td>5</td>
<td>06/09/2006</td>
</tr>
<tr>
<td>Self Service Demo, Allow student to change installment amount and number of installments. Installment Plans may assess an administrative fee.</td>
<td>5,000.00</td>
<td>5</td>
<td>06/09/2006</td>
</tr>
<tr>
<td>Self Service Spring 2006</td>
<td>5,000.00</td>
<td>5</td>
<td>02/11/2006</td>
</tr>
<tr>
<td>This 3 installment payment plan option has a first bill date of 02/01/06. Payment is due 10 days after billing.</td>
<td>5,000.00</td>
<td>5</td>
<td>02/11/2006</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

Students can self-enroll in payment plans.

The enhancements to the payment plan functionality include:

- A Batch Data Entry page
- Batch assignment using population selection
- Mass cancellation
- Self-service enrollment
Batch Data Entry Page

Many institutions receive lists or rosters of students for assignment to payment plans. To alleviate the challenge of manually entering and posting each student to a plan one by one, Oracle includes a new data entry page to enter multiple students to a payment plan. The administrator then runs a new batch posting process to post those students to the plan, update their accounts, and create the new payment plan accounts. This new functionality is a significant enhancement to help institutions streamline and simplify the management of their receivables and payment plans.

Batch Assignment Using Population Selection

Many institutions are seeking to further automate the assignment of specific populations of students to a payment plan or third-party contract. For example, some institutions want to place all undergraduate students on a default installment payment plan. Other institutions want to place all students in a particular program or to place a class section into a specific third-party contract. PeopleSoft Campus Solutions 9.0 includes new functionality to enable the institution to place defined populations of students onto payment plans or third-party contracts using Population Selection to define the specific student populations.

Mass Cancellation

Just as institutions have the need to place populations of students on a payment plan or third-party contract in batch, they also have the need to remove populations of students from plans or contracts in batch. You can use the same batch assignment process to cancel students from a payment plan or third-party contract. The administrator defines the appropriate population using the Population Selection process, then runs the process with the status set to Cancel. The students are removed from the contract, the plan or contract is reversed, and the original charges are reinstated.

Self-Service Enrollment

Oracle also delivers new functionality to enable students to self-enroll in a payment plan via self service. Institutions identify the plans that they choose to make available through self service (using either the lump-sum or calculated options). Students can then access a new self-service page to enroll themselves in payment plans. This streamlines the enrollment and receivables management processes and frees administrative staff for more value-added work.

Billing

Institutions today face many financial challenges, and an institution’s ability to collect fees from its students is critical to its financial health. To accomplish this, the institution must have the ability to produce clear, concise billing documents that provide adequate detail and other information about the student’s charges, due dates, payment options, and other relevant information. The document must also reflect the institution’s particular personality and brand.
To help institutions produce billing documents, Oracle provides enhanced functionality using Oracle’s XML Publisher tool. Oracle’s XML Publisher provides institutions with greater flexibility and options to produce professional documents in a variety of formats, including letter, standard forms, and PDF files. Oracle’s XML Publisher also provides the ability to easily brand the document with the institution’s logo, message, or other unique identifying images.

**Self-Service Miscellaneous Purchases**

Most institutions have some sort of miscellaneous charges that they assess through the student receivables system. In many cases these miscellaneous charges are optional or are triggered only when the student requests the service associated with the charge, such as the purchase of a yearbook, a parking permit, or an athletic center membership. Because these items tend to be more ad hoc in nature, institutions want to have them available for students to select and pay for as part of self service.

Oracle now provides Miscellaneous Purchases to enable self service for this category of charges. Miscellaneous Purchases requires payment at the time that you select the item.

To make miscellaneous purchases, students go to self service and select the appropriate charge items. The system then takes the students directly to the Make a Payment process, where they are required to pay for the charges before completing the transactions. Once the students have completed the payment process, both the charges and the payments are posted immediately to the students’ accounts.

---

**Purchase Items**

2. Select Items

Enter the quantity for the items you wish to purchase. Use the calculate total push button to calculate the total amount of your purchase. Click NEXT to confirm your purchases.

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Item Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Football Tickets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UC Berkeley, Cal Tech</td>
<td></td>
<td>35.00</td>
<td>0.03</td>
</tr>
<tr>
<td>USC, UC, USC</td>
<td></td>
<td>38.00</td>
<td>0.03</td>
</tr>
<tr>
<td>Football Tickets Total</td>
<td></td>
<td></td>
<td>0.03</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Term</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Item Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking Pass A</td>
<td>2006 Fall</td>
<td>45.00</td>
<td></td>
<td>0.03</td>
</tr>
<tr>
<td>Parking Pass B</td>
<td>2006 Fall</td>
<td>40.00</td>
<td></td>
<td>0.03</td>
</tr>
<tr>
<td>Parking Pass C</td>
<td>2006 Fall</td>
<td>50.00</td>
<td></td>
<td>0.03</td>
</tr>
<tr>
<td>Parking Pass Total</td>
<td></td>
<td></td>
<td></td>
<td>0.03</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.
Total 0.88

Students can select and pay for miscellaneous charges through self service.
(USA) Self-Service 1098-T Forms

Institutions based in the United States are required annually to issue IRS Form 1098-T to students so that the students can report tuition and fee amounts on their tax returns for a possible tax credit. PeopleSoft Student Financials 9.0 enables students to display and print their completed 1098-T forms in PDF format via self service. This capability further supports institutions and their efforts to reduce costs and streamline administrative processes. This capability uses Oracle’s XML Publisher tool to create the PDF document.

The following features support this new functionality:

- Institutions can control how completed forms appear via a new option on the 1098-T TIN setup page.

- Once the 1098-T forms are generated and printed (or transmitted), the student can access a summary of the information from the completed 1098T form.

  The student can then select to print the completed form in PDF format.

- The student is required to provide consent and eSignature before accessing the completed form.


Students display and print their completed 1098-T forms in PDF format via self service.
Global Invoicing

Many institutions, especially those outside of the United States, are required to bill and collect payments from students using an invoice model rather than the standard statements that are typically used in the United States. To support our many customers outside the United States, Oracle delivers new functionality for invoicing for student receivables.

Global invoicing features are:

- Charges are linked to a specific invoice with a unique invoice number. Subsequent invoices include only new activity and do not include any prior balance.
- If the student does not pay an invoice, the institution sends a reminder letter rather than including those unpaid charges in another invoice.
- The student makes a payment against a specific invoice rather than against the overall account. Any charge or payment priorities are applied only within the context of the specific invoice.
- If charges are reversed after being invoiced, there is a specific credit invoice created that references the original invoice.
- Excess payments or a credit balance from an invoice are refunded to the student unless the student authorizes the institution to apply that credit to a different invoice.
- With invoicing, charges are passed to the General Ledger only once they have been invoiced.
Institutions can use this new invoicing functionality or continue with the existing billing statements. Oracle adds a new option to the Student Financials Installation setup to activate the Invoicing functionality as described. In addition, Oracle provides new setup so that the institution can define its banking information for inclusion on the invoice as necessary.

To support customers outside the United States, Oracle delivers new functionality for invoicing for student receivables.

**PEOPLESOFT FINANCIAL AID 9.0**

Enhancements to PeopleSoft Financial Aid include self-service capabilities and additional functionality so that institutions can better manage their packaging and award maintenance processes.

**External Award Feature**

Many institutions face the challenge of managing awards coming from multiple sources. These awards can be communicated to the institution in electronic data files from organizations such as state scholarship agencies or scholarship agencies. Award information might also be sent in spreadsheets from various academic departments or schools within the institution. To facilitate processing these awards and placing them on the student's award record, Oracle delivers new functionality to enable the institution to automate this important step.

The External Award feature includes:

- The ability to define and maintain separate layouts for the different types and source of files to be processed.

  For example, the financial aid office might have one layout for awards coming from a state grant program and another layout for scholarship awards from the university’s school of business.

- The ability to identify Student Financial payments as an external award to be posted to a student’s financial award package.

  For example, employee waivers and third-party contract payments are posted to a student financials account for a student.
• Loading of external awards to staging tables, where the aid administrator can edit or place pending transactions on hold.

Also, the aid administrator can manually populate the staging tables as a simplified way to enter ad hoc awards for a variety of students.

• Inclusion in the new Repackaging process to resolve any overaward situations, if necessary (see discussion that follows).

Manage External Award Data

<table>
<thead>
<tr>
<th>Transaction Nbr</th>
<th>Date</th>
<th>Data Source</th>
<th>File Mapping</th>
<th>File Name</th>
<th>Student Count</th>
<th>Award Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>08/18/2006</td>
<td>Data File</td>
<td>EXIT FILE EA DATA</td>
<td>Wondershare2SharedStorageBarfiedelAuto001.csv</td>
<td>8</td>
<td>4,998.08</td>
</tr>
</tbody>
</table>

Summary pages display financial aid data loaded from external files.
Packaging

The Packaging process is a critical process for a financial aid office. It involves many rules and criteria such as federal government requirements, institutional goals and objectives, and overall balance and equity in how funds are distributed. Also, students need to know their award statuses to make their enrollment plans. Therefore, packaging must be done correctly and efficiently. The following PeopleSoft Financial Aid 9.0 features and enhancements streamline packaging processes.

Auto Select Packaging

Currently, the aid administrator must first determine the correct Packaging Plan, assign it to the student, and then retrieve the associated awards, validate, and post the award package. The manual intervention required to assign the Packaging Plan ID increases errors and inconsistencies with the Mass Packaging batch process, which uses the criteria or equations from the Packaging Plan setup.

To address these issues, the Auto Packaging and Auto Repackaging processes in PeopleSoft Financial Aid 9.0 can automatically select the Packaging or Repackaging Plan using the same criteria or equations from the Packaging or Repackaging Plan setup. However, the aid administrator can continue to manually assign the Packaging or Repackaging Plan ID as needed.

Mass Packaging Query Definition

The previous release of PeopleSoft Campus Solutions introduced the Equation Engine. PeopleSoft Campus Solutions 9.0 extends this feature to define the population to be packaged with Mass Packaging Selection.

To further control the Mass Packaging process, the new Population Selection feature enables institutions to define their populations using the Equation Engine, PS Query, or an external ID file. This flexibility enables institutions to tailor their Mass Packaging runs and overall packaging processes to meet their specific needs and requirements.

(For more information on Population Selection, see the Campus Community section in this document.)

Repackaging

As part of the packaging process, institutions must frequently revise the award package for a student due to a variety of changes, including new awards, changes in eligibility, or changes in funding levels. To repackage these students in an automated manner, institutions using the current release must run the same packaging process as they ran for the initial award package. That is, they cannot adjust the existing award package, but must calculate an entirely new award package. Depending on the timing of the recalculation, this can result in the student receiving a drastically different award package.
For example, if the institution has already awarded its entire pool of FSEOG funds, a student who initially received the award may not receive it now because there are no remaining funds to award. Similarly, this process does not effectively recognize when a student has taken an action on an award, such as accepting or rejecting a particular award type. Complex manual workarounds are required to avoid problems in this situation.

PeopleSoft Campus Solutions 9.0 includes an extensive new repackaging functionality that enables institutions to define Repackaging Plans similar to the current Packaging Plans with rules to control how the system adjusts the student’s award package to resolve overawards or additional Unmet Need scenarios. Adjustment options include:

- Decreasing the student's package by a specific item type.
- Decreasing the student's package by Award Type or Award Source.
- Validating a single item type or validating the student’s entire package.
- Increasing the student's package by a single item type or related item type group if there is Remaining Unmet Need.

You determine the rules for financial aid repackaging.

This new Repackaging process uses the Population Selection process to enable the institution to identify a specific population to be processed. The Population Selection process enables the institution to define the population to be processed using the Equation Engine, PS Query, or an external ID file.
Self Service

Oracle continues to build out the self-service design and functionality started in the previous PeopleSoft Campus Solutions release. Following are brief descriptions of the specific functionality in PeopleSoft Campus Solutions 9.0.

Report External Awards

Many institutions are moving more and more of their student interactions to the Internet. Previous PeopleSoft Campus Solutions releases support the ability for students to accept their financial aid award offers on self-service pages. With PeopleSoft Campus Solutions 9.0, students can also notify the institution of any additional sources of funding. Because the institution is required to track additional sources of funding, students must report any additional funds as soon as they are known so that the institution can quickly make adjustments to the previously offered award package. Ensuring that students have the most current and accurate notifications of their award packages is critical so that the institutions receive prompt and accurate payment against any outstanding student receivables.

PeopleSoft Campus Solutions 9.0 provides the following new self-service functionality for student reporting of any additional sources of funding:

- Ability for the institution to define item types and make them available for students to select as part of the self-service data entry process.
- Addition of a description field for awards not already defined by the institution by an existing item type.
- Ability for schools to aggregate external awards into a single item type or maintain them separately.
- External award suspense tables populated by external awards reported on self-service pages.

The aid administrator can review and verify submitted awards, map awards to item types as necessary, and then post those new awards to a student’s award record using the new External Award Load process (see new External Award feature above).

- Self-service messages that appear when a new external award is in pending status. Students can view their awards on self-service pages.

View and Print Financial Aid Award Notice

Institutions seek ways to reduce administrative costs by providing information, documents, and communications to students through self-service pages. To help institutions meet these goals and expectations, Oracle offers the ability to provide the financial aid award notice to students online.
Coupling the Forms Engine version of the Financial Aid Award Notice (FE FAN) with self service, this new functionality enables institutions to display a link for students on the Award Summary and Accept/Decline Award self-service pages. By clicking on this link, students can view a PDF version of their most recent FE FAN for that aid year. They can then use the print functionality through the Adobe Reader viewer window to print a copy of the FE FAN. In addition, the aid administrator can track which students have printed their FE FAN from new status fields on the Award Notification Summary inquiry page.

Select a Lender

To expedite the disbursement and delivery of loan proceeds to the institution and to students, many institutions now use preferred lender lists, or simply assign students to lenders. However, some institutions prefer that the student select a lender and require the student to do so before processing the loan. To assist those institutions that require students to select their lenders, PeopleSoft Campus Solutions 9.0 delivers a self-service option.

To use the option, the institution defines a new Lender Selection List by loan type, including institution-defined text about each lender, and specifies the order in which the lenders will appear in the list.

When the student has been awarded a loan for a loan type that requires a lender, the student can select a link on the Accept/Decline Award page. This link takes the student to the new Lender Selection page, which displays the lenders from the Lender Selection List for that loan type.

- The system looks for current loans, prior loans in PeopleSoft Campus Solutions, or prior loans in NSLDS for the student.
  
  If the system finds that the student has a prior lender, it displays this lender to the student.

- If the student changes to a new lender from the prior year lender, an institutionally defined warning message can provide the student with guidance on the risks or implications of changing the lender.

- Because of the challenges and the wide variety of business and loan processing options, the student can only select or change the lender once through self-service.

  If the student attempts to change a lender that the student has already selected, a message instructs the student to contact the financial aid office to make any changes. This message is configurable by the institution.
Access Loan Counseling

Institutions are required to conduct loan counseling with their student loan borrowers before these students can borrow for the first time from a new loan program and after these students leave the institution. Institutions must track student fulfillment of these requirements. Currently, tracking completion of entrance and exit counseling is not tied to the specific loan program. Also, current releases do not provide a mechanism for communicating requirements to students or alerting students that they must fulfill the counseling requirement.

To assist institutions in their compliance with the federal loan counseling requirements, PeopleSoft Campus Solutions 9.0 provides:

- Administrative pages to track completion of both entrance and exit counseling by loan program for each student.
- Setup pages to define those loan programs requiring counseling and the effective dates for displaying exit-counseling dates.
- Links that appear on self-service pages if the student has not already completed the required counseling.

The links take the student to the loan-counseling site of the institution’s choice, such as the primary lender, Mapping Your Future, or others. Oracle does not deliver or support the actual loan counseling content.

Authorize Application of Financial Aid Funds for Non-Allowable Charges

U.S. Department of Education requires that institutions use TIV federal financial aid awards to pay only allowable charges for the period of enrollment covered by the aid year in which the institutions awarded those funds. Allowable charges are tuition, mandatory fees, and contracted room and board with the institution. Schools must collect authorization from the student to allow funds to pay for non-allowable charges, such as parking or library fees or for the period of enrollment just prior to the current aid year. Currently, administrators can record an authorization from a student, but the institution must collect that authorization manually or through a custom web page.

PeopleSoft Campus Solutions 9.0 delivers functionality that enables students to provide this authorization through self service:

- Student authorization is supported through the use of Student Permissions in Student Financials.

A check box indicates if that permission should be made available in self service. A long description field is available if the school must provide a more detailed description of the permission.
The student authorization page for self service includes a disclosure statement along with the longer description of the permission to be selected. The student must select and confirm one permission at a time. The permission is posted real time and used the next time that the activity occurs on a student’s account.

Because posting and payment allocation processes are complex, after students confirm authorization, the system displays authorization on student self-service pages, but students cannot remove authorizations. Only an administrator can remove an authorization at this point.

Population Update and Population Selection

Most of financial aid is rules- and regulation-driven, but sometimes the aid administrator must update data on an ad hoc basis. For example, the institution might need to meet unique business requirements or adjust to changes in regulations or funding. Most institutions have developed custom SQRs or other processes to support these needs.

With PeopleSoft Campus Solutions 9.0, Oracle delivers new Population Update functionality to be used with Population Selection. Using these two features, administrators can update certain records and fields for defined student populations. For PeopleSoft Financial Aid, the administrator can update the following records and fields:

- You can update most fields on the Packaging Status Summary page (PS_STDNT_AID_ATRBT) to meet unique business needs.
  For example, an institution can use the Population Update process to define a unique population that it wants to target for an institutional verification process by selecting Select in the INST Verification Status field. An institution could also use the Population Update process to define a population of students who are ready to be packaged by selecting Package in the Aid Processing Status field.

- You can update two fields on the Financial Aid Term component (STDNT_FA_TERM): BUDGET_REQUIRED and FA_STATS_CALC_REQ.
  The Budget Required field is automatically set to Assign Budget when other data in the system is changed and when that data might have an impact on the student’s Cost of Attendance budget. Schools can use the Population Update process to reset that value to No Assign when they do not want to recalculate the budget for a particular student population.

- You can update all fields on the Packaging Variables component (STDNT_PKG_VAR).
  Many institutions use these numeric, flag, and character variable fields to store local data for use with the Packaging process. Institutions can use the Population Update process to easily populate these packaging variables.
For more information on Population Selection and Population Update, see the PeopleSoft Campus Community section in this document.

PEOPLESOFT CONTRIBUTOR RELATIONS 9.0

The new release for PeopleSoft Campus Solutions reflects the top priorities from PeopleSoft Contributor Relations customers. A number of enhancements streamline data entry and access to the system. In addition, PeopleSoft Contributor Relations customers can benefit from the foundational enhancements in the PeopleSoft Campus Community module. Virtually every business process area in PeopleSoft Contributor Relations has some enhancement in functionality as well as usability.

External Organizations

The External Organization component, while designed to support multiple modules in PeopleSoft Campus Solutions, such as Admissions or Student Financials, is used extensively by PeopleSoft Contributor Relations customers. Because of the heavy use of this feature in the Advancement office, customers demanded improvements in the setup and maintenance of this data. In previous releases, adding and maintaining external organizations was time-consuming and cumbersome. For example, correction mode was needed to complete the setup of an external organization. In PeopleSoft Contributor Relations 9.0, customers can maintain a history of all changes to external organizations, including changes to contacts, locations, and departments.

The External Organizations feature has been rearchitected to streamline data entry and to add more flexibility around how external organizations are used, especially in the realm of generating communications. Some of the changes include:

- Effective dating added to the External Organization Location, Contact, and Department components.

  Effective dating enables you to accommodate a history of changes to any of these elements. For example, if the contact in an organization changes over time, you can now see both the prior and current contacts.

- Enhancements to Contact Type, such as Preferred Contact, which enable greater control over communication selections.

  Previously, when you wanted to communicate with a contact in an external organization, you could select only one Primary Contact. This limit might cause the letter to go to an inappropriate person, potentially limiting the effectiveness of the communication. The new design offers more options to ensure communications reach the most appropriate person or persons. You can now define one or multiple contacts to receive the communication: All Contacts, Custom List, Organization Preferred, or Organization Primary. The Custom List value enables you to select any contact, regardless of contact type.
• Expanded choices in Communication Generation for Departments and Locations. The available options are: All Departments/Locations, Custom List, or Organization Primary Location/Department.

• Contact Type Usage follows the design of Name and Address Type Usage. With Contact Type Usage, you can define and select the hierarchy of the contact type that you want, such as president's office, department head, and so on. If the first contact usage type isn't present, the system looks for the second, third, and so on. To take advantage of this new feature in PeopleSoft Contributor Relations, we added the Organization Recipient Usage field to the run control for the new Communication Generation process.

External organization enhancements

• A new External System Organization ID. As with prospect, donor, and alumni, many institutions use lists from external sources or associate their organization affiliations with a ratings scheme or some other identification. The External System Organization ID helps to ensure that you can track the external system identifier, if any, within the existing external organization data structure. For example, your development office may be communicating with a service that provides foundation information, such as support interests, and your users need to keep data about the foundations in sync with the external provider. The new External System Organization ID provides the data needed to match records when the users need to communicate with the external system. Previous releases allowed this capability only for people, not for organizations.
• A new setup table so that you can identify if an external system ID is for people, organizations, or both.

To ease the upgrade, we plan to migrate the old values from the Translate Table into this new table.

• Customizable navigation. Because the external organization structure is used by several business offices on campus and is business process-specific, the enhanced navigation supports multiple users’ needs.

For example, as part of completely defining an external organization, PeopleSoft Contributor Relations users may need to add information about foundations while still supporting data that is required by users in the Admissions and Student Financial offices. You can now add navigation to the External Organization component so that you can move efficiently to the other pages needed to complete the setup. We added new controls in the External Organization Type field to drive the new navigation. This enhancement streamlines the component so that you see only what is pertinent to the generic organization and can then navigate to the specific information desired. Further, because the institution defines this navigation, you have the ability to link whichever additional pages you may want to complete as part of defining an External Organization. When you click the navigation links on the External Organization component, you are transferred to those new pages, are able to make your updates, click Save, and then be returned to the original External Organization page.

• Support for multiple North American Industry Classification System (NAICS) codes for each organization (the system that replaced the Standard Industry Codes in North America) while preserving the single SIC field in current releases.

We deliver the current NAICS values as sample data but do not plan to update this list going forward.

• A new External Organization Regional page modeled after the Person Regional page.

This new page includes the NAICS (mentioned in prior paragraph), information specific to the Netherlands, and information to support OUAC for Ontario, Canada.
Usability Improvements

There are a number of places throughout PeopleSoft Contributor Relations where customers have requested a different flow or additional data fields to better support their business processes. Some of these enhancements include:

- Header portion of all PeopleSoft Contributor Relations pages made consistent throughout, with the FERPA link and Prospect Manager information available where appropriate.

  If the prospect manager has an email address on record, the Prospect Manager link opens the email client so that users can communicate immediately to the person designated as the Prospect Manager in the context of the transaction being reviewed.

- Foundation data entry fields give you the ability to view and search for foundations meeting specific funding requirements.

  This enhancement is based on customer input about the challenges they have maintaining foundation information such as the name of the funding entity. We also added a new component to track foundation areas of interest, proposal timing, and so on. We also deliver a supporting online inquiry page that enables you to find foundations that support a particular kind of project, within a specified time frame, to make it easier to identify prospect foundations.
• Spouse Rings are added to the Bio-Demo pages in the Campus Community pages accessed from within the PeopleSoft Contributor Relations menus.

Adding the icon for Spouse Rings ensures a more complete view of spouse relationships throughout the Campus Community pages, along with the enhanced ability to keep the data about spouses in sync. For example, if you are changing an address for someone, you can click the Spouse Rings icon to link to that person's spouse and update that address as well.

• Link between Involvement Codes, Types, and Categories.

The Involvement module was designed to inform staff about the affiliations, interests, activities, honors, and awards of an individual. This enhancement helps to ensure that Involvement Code values are appropriately linked to Categories and Types, thereby improving data integrity.

• Associate the Involvement Code to at least one Type and at least one Category to ensure the correct data is being entered.

This connection makes it much easier for you to select the appropriate value for the type of involvement they are tracking. For example, Survey Results do not intermingle with Scholarship types.

• Effective Dating rules that enable multiple rows to exist so that you can see a history of the changes to that Unit, such as a Description, over time.

• Streamline data entry and combine activities onto a single page.

For example, the definition of staff and volunteers includes the Role setup to more efficiently manage and maintain information about staff and volunteers. By combining two components into one, you can immediately indicate the roles a staff person or volunteer may take, such as Prospect Manager.

• More intuitive navigation, especially in the self-service pages.

To improve the intuitiveness of the Outreach pages used by Prospect Managers, we applied a consistent set of buttons that appear at the end of each task managed through Outreach. This should help you select the step that you might want to complete next for a prospect. You can also use the Go To dropdown options to complete a task for another constituent in your My Prospects workset. (More enhancements to the Prospect Manager functionality are detailed in the next section.)
Prospect Management

Several enhancements provide easier, more flexible management of an institution’s prospective donors. These improvements include:

- Allowing you to enter Contact Reports prior to the completion of an action.

  On every action, there is a tab for Contact Reports so that you can track the results of the action. Prior to this release, you could enter only a Contact Report when the action was complete. The new design enables the Contact Report to be open while the action is in progress, enabling you to build contact reports as you go through the actions.

- Standardized Action summaries and filters to include Contact and Action Types.

  You can filter and sort by contact and action types, such as all phone calls together or all asks together. This is standard throughout the Prospect Management feature where actions are used, which improves the consistency of the overall feature.

- The Resource Assignment Inquiry pages are extended to sort alphabetically, as well as by Person or External Organization ID so that People and Organizations are not intermingled alphabetically in the list.

- Redesign the Ratings functionality to improve data integrity.

  You can now identify where a Rating indicator or Rating Category originated, such as Marts and Lundy. You can also link to specific rating indicators, such as to income ranges, to related categories (such as giving potential), or to types (such as peer or staff). This linking capability ensures a tighter connection with, and clarity of, the data.

Searches

All parts of the PeopleSoft Campus Solutions applications now use the enhanced Search/Match capabilities introduced in PeopleSoft Campus Solutions 8.9. The specific PeopleSoft Contributor Relations search was eliminated; now PeopleSoft Contributor Relations fields have been incorporated into the overall Search/Match process.

You now have the power of Search/Match, along with the ability to search on Class Year and other PeopleSoft Contributor Relations-specific fields. More importantly, you can create PeopleSoft Contributor Relations-specific Search/Match result sets. You can define the result sets specific to roles or to individuals. This flexibility enables various departments or units to see the results exactly as needed.

All the new Contributor Relations-specific search fields are included in the standard Search/Match functionality to allow saved-search criteria and results sets to be customized to your business processes with access controlled by security role if necessary.
Another enhancement to External Organization Search/Match result sets is the inclusion of Carry ID functionality similar to that currently available when searching for a person; all search records have been standardized throughout PeopleSoft Contributor Relations so that you can search by an expanded, consistent set of search fields.

**Search Criteria**

<table>
<thead>
<tr>
<th>Search Fields</th>
<th>Operation</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>National ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Name Search</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name Search</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnic Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date of Death</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Constituent Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class Year</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example of PeopleSoft Contributor Relations-specific Search/Match functionality
Example of search results; you can choose to carry these IDs throughout the system.

**Academic Summary**

PeopleSoft Contributor Relations now provides a single page to display all degree information in a grid structure that can be sorted based on a user’s preferences. The data continues to be stored on multiple tables, such as external, legacy, and student administration; however, this new record supporting the Summary Page also proves useful for reporting. You no longer have to query against three tables because the data is now available in one view, with both the descriptions and codes for each degree.
**Gift Entry Extensions**

The Gift Entry process now:

- Flags as DECEASED those Recognition and Donor IDs with dates of death or deceased service indicators when you select those IDs in gift/pledge/membership entry.

You must verify that you should be entering a gift in the deceased record, which should help you avoid entering data into the wrong record.

- Enables you to exclude non-monetary gifts, such as gifts-in-kind, from GL Interface processing.

This enhancement follows the design of the existing controls in Pledge entry, where the Pledge Flag controls when pledges need to feed to the GL. The Pledge Flag is set by default to off, ensuring that you turn it on in order to send pledges to the GL. In the new enhancement for Gift entry, the system is set up with the new flag on by default, assuming that you are going to send the gift to GL. However, if the institution’s business processes determine that the default is not appropriate, you can override this option.

- Includes new Search links on the Gift Entry pages.

These links enhance the Search/Match feature (see description above) by providing you with the power of Search/Match for Gift, Pledge, and Membership Entry. Because the Carry ID functionality has also been delivered, you can copy the Carry ID for a person or an organization, which saves time.

- Expands the reach of selection for the Tribute Notify ID value in Gift and Pledge processing.

You can now select any person in the HCM database (any Employee ID in PeopleSoft Campus Solutions or HRMS). This enhancement should help ensure that institutions have complete gift and pledge data.

**Tender Detail Extensions**

Enhancements to PeopleSoft Contributor Relations 9.0 enable customers to use new Tender Type Detail pages to support gifts-in-kind and securities. A specific data entry page now enables you to track details related to gifts-in-kind, such as whether an appraisal was performed. A separate data entry page provides fields that you can use to track the value of transferred securities, such as stocks and bonds. Also available on the Tender Type Detail pages are fields for the description and security information, including CUSIP number.
Searchable data fields for details and comments about gifts-in-kind

For tender details that are not pertinent to data that is transferred to the GL during posting, a new, editable Tender Details page enables you to edit these details outside of a session.

Matching Gift Extensions

Our current functionality for Matching Gifts is robust. Enhanced matching gift functionality in PeopleSoft Campus Community 9.0 enables you to do the following:

- Create a matching gift at the point that the unexpected match is received and enter it for the matching organization.

  Institutions frequently have to deal with receiving an unexpected matched gift from an organization for a donor they didn’t have in the match program, or for whom they had not created a relationship. The new functionality enables you to associate donors with organizations and to create the matched gift records while processing Matching Gift information.

- Check all gifts during a session, create all expected matching gifts prior to balancing the session, and create entries at the individual gift level.

  This new functionality acts as an added safety net to help prevent the loss of potential matching gifts so that your development organization can maximize the outcome of each gift campaign, especially when matching is involved. Previously, the matching process was applied only at the Gift level, not at the session level. So if you missed the step of clicking the button to kick off the process, you missed the match. The Maintain Sessions page now has a Session matching gift button. At the end of the session, you click the matching gift button, and the program reviews all person records that you have not evaluated and checks for matching gift opportunities.
Session Extensions

Session entry enhancements include:

- A Deposit Number field (bank identifying information) to align a particular session with a particular bank deposit for auditing purposes.

- A tree structure to view Session Details to permit a cascading, hierarchical view of the details of all gifts in the session by various criteria, including designations, recognitions, tributes, and matching gifts.

From the tree view, you can drill down on each gift to make any changes or additions needed and then return to the tree. You can also print this tree structure as a report using the browser Print command.
A tree structure makes it easier to make and track multiple gifts by various criteria.

**Population Selection**

Customers need the ability to identify groups of individuals or organizations for a variety of purposes. In PeopleSoft Campus Solutions 9.0, Oracle provides a powerful, easy-to-use tool that enables you to dynamically create groups. PeopleSoft Contributor Relations users can continue to use the existing Build/Merge audience process, along with the new Population Selection utility.

See more detailed information about Population Selection in the Campus Community Section of this document.

The Population Selection process includes a configurable selection tool framework that enables you to create a group of Employee IDs, Organizations, or any set of data that they choose using:

- PS Query
- Equation Engine
- External file load (for example, MS Excel spreadsheet).

The following PeopleSoft Contributor Relations batch processes are now reconfigured to use this new tool:

- Audiences
- Initiatives
- Membership organizations
- 3C Engine
- Communication assignment
- Service Indicator assignment and removal
Oracle's powerful XML Publisher tool gives institutions much greater flexibility in the way that they create and deliver communications to individuals and organizations.

Communication

The primary enhancement within the area of Comments, Checklists, and Communications (3Cs) for PeopleSoft Contributor Relations users is the addition of a new Communication Generation process. This process does not replace the existing Letter Generation process or the communication structures, but instead provides much greater power and flexibility for creating communications because it is delivered as an Application Engine program that is constructed using the XML Publisher tool.

Oracle XML Publisher is a new java-based product available within the technology stack of PeopleTools 8.47. Using a set of familiar desktop tools, such as Adobe Acrobat and Microsoft Word, you can create and maintain their own report formats based on development-delivered XML data extracts. Oracle XML Publisher then converts these documents to the XSL-FO format. You can also obtain third-party provided PDF forms, such as government tax forms, and merge XML data generated from any PeopleSoft application to complete the forms with the required data.

In addition to a new Communication Generation engine, other 3C enhancements include:

- Communication preference selection, such as emails or letters.
- Enhanced external organization contact usages that enable you to select a Primary, Preferred, or Custom List.
- Use of a Population Selection tool to mass assign communications for organizations or individuals.
For more detailed information about Communications, see the Campus Community Section of this document.

**CONCLUSION**

Today’s education environment calls for institution management to go well beyond the basics. With highly diverse and changing student population compositions, institutions must focus on attracting, nurturing, and retaining the best students, faculty, alumni, and staff. At the same time, increased scrutiny, accountability, performance metrics, and cost controls to guide operations mean that technology investments must be strategic and provide demonstrable ROI—or value—to the institution.

PeopleSoft Campus Solutions 9.0 meets customer needs, industry best practices, analysts’ recommendations, and Oracle’s own commitment to and leadership in the higher education industry.