CHAPTER 1

Setting Up Student Records Self-Service

This chapter provides an overview of enrollment error messaging and in self service and discusses how to:

- Set up self-service features for Student Records.
- Set up a self-service Student Center.

Understanding Self-Service Enrollment Error Messaging Setup

The system generates enrollment request error messages during the process of adding and dropping classes. This feature is available not only for administrative but also for student self-service enrollment pages. However, for self-service users you must first:

- Select the Enrollment Information check box in the Enrollment Preferences group box on the Enrollment setup page.
- Select the Enroll Info: Enrollment Req check box in the Class Detail Optional Self-Service Fields group box on the Class Search setup page.

These two check boxes control whether requisite descriptions appear on the Enrollment Preferences page when students add a class or click a class link in which they’re enrolled. They also determine:

- Whether requirement group descriptions appear on the View Results page in self-service enrollment.
- Whether the descriptions appear when a student validates a shopping cart entry.

See Also

lssr, Processing Class Enrollment Transactions, Processing Enrollment Transactions Through the Quick Enrollment Component

Setting Up Self-Service Features for Student Records

To set up self-service Student Records, you use the Student Records component (SSR_SS_ENRL_OPT) and the Weekly Schedule Time Period component (SETUP_TIME_PERIODS).

This section discusses how to:

- Define Student Records setup.
- Define class search setup.
• Define other setup.
• Set up weekly schedule time periods.

Pages Used to Set Up Self-Service Features for Student Records

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment</td>
<td>SSR_SS_ENRL_OPT</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Records, Enrollment</td>
<td>Enable self-service features and define parameters and rules for self-service Student Records functionality.</td>
</tr>
<tr>
<td>Class Search</td>
<td>SSR_SS_CLSRCH_OPT</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Records, Class Search</td>
<td>Select the fields that appear on the self-service Class Search and Class Detail pages.</td>
</tr>
<tr>
<td>Other</td>
<td>SSR_SS_OTHR_OPT</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Records, Other</td>
<td>Controls the display of phone details for advisors and committee members on the My Advisors page, controls whether advisors have access to non-advisee data from the View My Advisees page, and provides options for how to search for a Faculty member.</td>
</tr>
<tr>
<td>Weekly Schedule Time Periods</td>
<td>SETUP_TIME_PERIODS</td>
<td>Set Up SACR, Product Related, Student Records, Enrollment, Weekly Schedule Time Periods</td>
<td>Define the times that define the ranges of time that the system displays on the Weekly Schedule page for both instructors and students. The PeopleSoft system delivers a set of time periods for every hour in a 24-hour period. You can modify or add to these values to meet your business requirements; for example, you can add half-hour intervals.</td>
</tr>
</tbody>
</table>

Defining Student Records Setup

Access the Enrollment page (Set Up SACR, Common Definitions, Self Service, Student Records, Enrollment).
Enter descriptive information about the setup. This field is for informational purposes only.

**Enrollment Shopping Cart**

**Allow Validation**
Select to enable the Validation feature. This feature enables self-service users to validate their Shopping Cart entries against a subset of edits from the Enrollment Engine. You can select which edits the Enrollment Engine runs. The options are time conflicts, repeats, requisites, and unit limits. If you select this check box, you must select at least one of these options. Clearing this check box hides all references to validation in the system.

**Time Conflict**
Select this check box if you want the Enrollment Engine to check time conflicts while validating Shopping Cart entries.

**Repeats**
Select this check box if you want the Enrollment Engine to check repeats while validating Shopping Cart entries.

**Allow During Enrollment Appt (allow during enrollment appointment)**
Select to enable users to validate their Shopping Cart entries during their enrollment appointment. If you select this check box, the Validate button appears in the Shopping Cart during the student’s enrollment appointment. If you clear this check box, the Validate button is not available in the Shopping Cart during the student’s enrollment appointment. This option prevents you...
from having to set up validation appointments that parallel your enrollment appointments.

**Requisites**
Select this check box if you want the Enrollment Engine to check requisites while it validates Shopping Cart entries.

**Unit Limits**
Select this check box if you want the Enrollment Engine to check unit limits while it validates Shopping Cart entries.

**Enrollment Features**

**Use Wait Listing**
Select to enable wait listing. If you clear this check box, the system hides all references to wait listings in self-service. If you clear this check box, the system selects the Swap option by default and makes the Enroll with Drop if Enroll and Swap fields unavailable for edit.

**Swap Enrollment Action**
This field controls the processing of enrollment requests submitted from the Swap component in student self-service.

Select one of these options:

- **Bundle 15/Bundle 22**
- **There is a change to how swaps for non-enrollment components are processed — refer to the following updated documentation.**

  **Enroll with Drop if Enroll:** Select this check box to enable Drop if Enroll processing for self-service swaps. If you select this check box, when a student swaps from one class to another or to a different enrollment component of the same class, the enrollment engine drops the student from the class that the student wants to swap only after the student is enrolled in the preferred class. The enrollment engine does not drop a student who is on the wait list for the preferred class. The enrollment engine processes the preferred class with an enrollment action of Enroll.

  **Swap:** If you select this check box, when a student swaps from one class to another (or a different enrollment section of the same class), the enrollment engine drops the student from the unwanted class if they are successfully enrolled or when they are placed on the wait list in the preferred class.

  **Note.** If the swap is for non-enroll components only, the request is processed with a swap action regardless of the option that is selected on this setup page.

When a student tries to swap only the non-enroll component(s) on the Swap component (no change to the enrollment component), the transaction is submitted to the enrollment engine with an enrollment action of Swap (instead of Enroll with Drop if Enroll). This ensures that the student is enrolled (or wait listed) in the right combination of enrollment and non-enroll components. For example, if a student is enrolled in CHEM 102 lecture section 1 plus related lab 1A and tries to swap to a closed lab, 1B, electing to wait list, the transaction is submitted as non-enroll swap (i.e. swap section 1 to section 1 with related section 1B) where the student’s status will be changed from enrolled to wait listed for the lecture section, wait listed in the non-enroll lab section (1B), and dropped from their original lab section (1A).

**Enrollment Preferences**
Select the information that you want to appear in student self service.
Enrollment Information  Select to display enrollment requisite information about the self-service Enrollment Preferences page during the enrollment process.

Class Notes  Select to display class notes information on the self-service Enrollment Preferences page during the enrollment process.

Class Meeting Information  Select to display class meeting information on the self-service Enrollment Preferences page during the enrollment process.

Additional Self Service Setup

Display Typically Offered Data  Select to display when a course is usually offered at the institution. If this check box is selected, the data appears on a variety of self-service pages, including Browse Course Catalog, Course Detail, My Planner, and My Academic Requirements. If you clear the check box, the system does not display typically offered data within self-service, but it continues to display it on administrative pages.

Typically offered values are institutionally defined within a typically offered setup page. They are then assigned to courses on the Course Catalog - Offerings page.

Show Student Photos on Rosters  Select this check box if you want student photos to appear on the class and advisee rosters in the Faculty Center.

Defining Class Search Setup

Access the Class Search page (Set Up SACR, Common Definitions, Self Service, Student Records, Class Search).

<table>
<thead>
<tr>
<th>Last Update Date Time: 10/18/06 8:14:15AM</th>
<th>User ID: SAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note: Initial Installation</td>
<td></td>
</tr>
</tbody>
</table>

Class Search Optional Self-Service Criteria Fields

<table>
<thead>
<tr>
<th>Optional Criteria Fields</th>
<th>Student/Visitor Self Service</th>
<th>Instructor Self Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Open Entry/Exit Classes Only</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Meeting Time</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Day of Week</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Instructor Last Name</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Class Number</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Course Title Key Word</td>
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<td>✓</td>
</tr>
<tr>
<td>Course Units</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Course Component</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Session</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Mode of Instruction</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Campus</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Location</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

Class Search page (1 of 2)
### Class Search Optional Self-Service Criteria Fields

Select the search criteria fields that you want available in self-service class search for students and visitors and for instructors. For example, if you select Session for Instructor Self Service, then instructors who use class search in self-service will be able to use `session` as a search criterion.

### Class Detail Optional Self-Service Fields

Select the fields that you want to appear on the self-service Class Detail page for students and visitors and for instructors. For example, if you select Enroll Info: Enrollment Req (enrollment information: enrollment requisite) for Student/Visitor Self Service, then a student or visitor who clicks a class to view the Class Detail page will see the enrollment requirement requisite information for that class. Clear these check boxes if you do want to provide this information on the self-service Class Detail page.

### Defining Other Setup

Access the Other page (Set Up SACR, Common Definitions, Self Service, Student Records, Other).

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**Class Detail Optional Self-Service Fields**

<table>
<thead>
<tr>
<th>Optional Criteria Fields</th>
<th>Student/Visitor Self Service</th>
<th>Instructor Self Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Location</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enroll Info: Consent to add</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enroll Info: Consent to drop</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enroll Info: Enrollment Req</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enroll Info: Equit Designation</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enroll Info: Class Attribute</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Class Availability</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Combined Section - Listing</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Class Notes</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Catalog Description</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
My Advisor Pages

Use the My Advisor Pages group box to control the display of phone details of advisors, committee members, or both on the My Advisors page.

**Note.** You should select the same advisor phone number value on this page and on the Student Center Options page in the Student Center component (SSS_STUDENT_CENTER).

Advisor Self Service

If this check box is selected, the VIEW DATA FOR OTHER STUDENTS button becomes available on the View My Advisees – Advisee Roster page in Faculty Center. The check box is selected by default.

Advisors can access student data for non-advisees by clicking the VIEW DATA FOR OTHER STUDENTS button, which takes them to a search page.

If the Allow access to non-advisees check box is cleared, advisors cannot access student data for non-advisees. The VIEW DATA FOR OTHER STUDENTS button is hidden. If, when viewing an advisee’s data, an advisor clicks the Return to Search button, the advisor is taken to a search page on which only their advisees are available.

Faculty Search

Use this group box to control the data that you want to search against when you use the Locate a Faculty Member page in Faculty Center.

You can search against the entire population in the database or against data in the Instructor/Advisor Table component (INSTR_ADVSR_PERS).

**Personal Data**

Select this option to search against the entire population in the database when you use the Locate a Faculty Member page in Faculty Center.
Instructor/Advisor Table  Select this option to search against data in the Instructor/Advisor Table component when you use the Locate a Faculty Member page in Faculty Center.

**Warning!** You must be careful when setting up Self Service Faculty Search. You do not have to use the Instructor/Advisor Table component to assign instructors to classes. You should therefore select the option to edit the search for faculty members against data in the Instructor/Advisor Table component only if the Instructor/Advisor option is selected in the Edit Instructor Against group box on the Academic Organization Table page.

**See Also**

Isss, Using Faculty Center

Issr, Preparing for the Course Catalog and Schedule of Classes, Designating Approved Instructors and Advisors

### Setting Up Weekly Schedule Time Periods

Access the Weekly Schedule Time Periods page (Set Up SACR, Product Related, Student Records, Enrollment, Weekly Schedule Time Periods)

**Time**

Enter a range of values to define the periods of time that you want to appear on the self-service weekly schedule. The PeopleSoft application delivers a set of time periods for every hour in a 24-hour period. You can modify these values.

This field also controls the self-service exam schedule weekly view, in both the Student Center and Faculty Center. Hours can be subdivided into 30- and 15-minute intervals.

**Note.** To print the weekly schedule in full color, Internet Explorer 7 users must change their settings as follows: Tools, Internet Options, Advanced, Printing, select “Print background colors and images.” Without this setting, the schedule will print, but without background color.

### Setting Up a Self-Service Student Center

To set up a student center, use the Student Center component (SSS_STDNCNT_OPT).

This section provides an overview of defining student center setup options and discusses how to define self-service Student Center setup options.

### Understanding Defining Student Center Setup Options

The Student Center page is a self-service page that provides students a single entry point from which to navigate to student-related transactions. It also provides a single location where students can see information that is important to them, such as their class schedule, enrollment dates, and account information.
Using the Student Center Options page in conjunction with security setup, you can configure the Student Center page to control the user’s experience. On the Student Center Options page, you can decide which major sections will appear on the Student Center page. You can also use the Student Center Options page to configure some of the individual items that will appear on the Student Center page. Using security setup, you can limit student access to self-service transactions. You must use the Student Center Options page in conjunction with security setup to create a self-service experience for students. For example, if your institution uses the enrollment functionality in PeopleSoft Student Records but does not use swap functionality, you can show the Academics section by selecting the Show Academic Section option on the Student Center Options page but not grant students access to the Swaps page using security. In this case, the Academic section would appear on the Student Center, but the swap functionality would not. Also, not displaying a feature on the Student Center does not remove it from the navigation. To remove a feature from the navigation, you must use security.

### Page Used Set Up a Self-Service Center

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Center Options</td>
<td>SSS_STDNCRT_OPT</td>
<td>Set Up SACR, Common Definitions, Self Service,</td>
<td>Define the sections that you want to appear to your students in the self-service Student Center.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Student Center</td>
<td></td>
</tr>
</tbody>
</table>

### Defining Self-Service Student Center Setup Options

Access the Student Center Options page (Set Up SACR, Common Definitions, Self Service, Student Center).
### Student Center Options

**Last Update Date Time:** 10/18/2009 8:14:15AM  
**User ID:** SAMPLE

**Note:** Initial Installation

#### Major sections to be displayed on the Student Center
- [x] Show Academic Section
- [x] Show Finances Section
- [x] Show Personal Info Section
- [x] Show Admissions Section
- [x] Show Holds Section
- [x] Show To Do List Section
- [x] Show Enrollment Dates Section
- [x] Show Advisor Section
- [x] Show Links Section

#### Personal Information Section
- **Type of addresses to display:**
  - Address Box 1 (left): PERM - Permanent
  - Address Box 1 Link Label: Permanent Address
  - Address Box 2 (right): BILL - Billing
  - Address Box 2 Link Label: Billing Address
- [x] Display Phone Type: Main
  - Phone Link Label: Primary Phone
- [x] Display Email Type: Home
  - Email Link Label: Home E-mail

**Privacy settings link:**

#### Links Section
- **Section name:** News and Info
  - **Title:** CNN
  - **URL:** http://www.cnn.com
- **Section name:** BBC
  - **Title:** BBC
  - **URL:** http://www.bbc.com
- **Section name:** NBC
  - **URL:** http://www.nbc.com
- **Section name:** Search Engines
  - **Title:** Yahoo
  - **URL:** http://www.yahoo.com
- **Section name:** Google
  - **URL:** http://www.google.com
- **Section name:** Other Links
  - **Title:** Amazon
  - **URL:** http://www.amazon.com
Enter a note. This field is for informational purposes only.

**Major Sections to Be Displayed on the Student Center**

**Show Academic Section**
Select to show the Academic Section on the self-service Student Center page. This section contains links to My Class Schedule, Wish List, enrollment, and other Student Records functionality.

**Show Finances Section**
Select to show the Finances Section on the self-service Student Center page. This section contains links to PeopleSoft Student Financials and PeopleSoft Financial Aid functionality, such as Account Summary and View My Financial Aid.

**Show Personal Info Section**
Select to show the Personal Info Section on the self-service Student Center page. This section contains links to biographical information features, such as addresses, phone numbers, email address, emergency contacts, and user preferences. If you select this check box, the fields in the Personal Information Section group box become available for edit.

**Show Admissions Section**
Select to show the Admissions Section on the self-service Student Center page. This section contains links to PeopleSoft Recruiting and Admissions functionality, such as applying to another academic program, requesting admissions information from your institution, or checking on the status of an application. If you select this check box, the fields in the Admissions Section group box become available for edit.

**Show Holds Section**
Select to show the Holds Section on the self-service Student Center page. If you select this check box, the fields in the Holds Section group box become available for edit.

**Show To Do List Section**
Select to show the To Do List Section on the self-service Student Center page. If you select this check box, the field in the To Do List Section group box becomes available for edit.
### Setting Up Student Records Self-Service

#### Chapter 1

<table>
<thead>
<tr>
<th>Setting Up Student Records Self-Service</th>
<th>Chapter 1</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Show Enrollment Dates Section</strong></th>
<th>Select to show the Enrollment Dates Section on the self-service Student Center page. This section contains enrollment appointments, validation appointments, and open enrollment dates.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Show Advisor Section</strong></th>
<th>Select to show the Advisor Section on the self-service Student Center page. This section displays academic advisors and committees assigned to the student. Within the Advisor Section, students click the Details link to go to the View My Advisors page.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Show Links Section</strong></th>
<th>Select to show the Links Section on the self-service Student Center page. If you select this check box, the fields in the Links Section group box become available for edit.</th>
</tr>
</thead>
</table>

#### Personal Information Section

<table>
<thead>
<tr>
<th><strong>Address Box 1 (left) and Address Box 2 (right)</strong></th>
<th>Enter the address types to display in the Personal Information Section of the Student Center page. Only address types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Address Box 1 Link Label and Address Box 2 Link Label</strong></th>
<th>Enter the label to be displayed for the address links on the Student Center page.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Display Phone</strong></th>
<th>Select to display the student’s phone number on the Student Center page.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Type</strong></th>
<th>Enter a phone type to display. Only phone types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Phone Link Label</strong></th>
<th>Enter the label to be displayed for the phone link on the Student Center page.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Display E-mail</strong></th>
<th>Select to display the student’s email address on the Student Center page.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Type</strong></th>
<th>Enter email types to display. Only email types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Email Link Label</strong></th>
<th>Enter the label to be displayed for the email link on the Student Center page.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Privacy settings link</strong></th>
<th>If you do not use Family Educational Rights and Privacy Act (FERPA), enter a URL to your institution’s privacy site. When you enter a URL in this field (starting with http://) a Privacy Settings link appears on the self-service Student Center page. It will direct users to the website you defined. If your institution uses FERPA, leave this field blank and give your self-service users access to the FERPA self-service page. In this case, users will access FERPA from the Personal Information prompt by selecting the Privacy Settings option.</th>
</tr>
</thead>
</table>

#### Admissions Section

<table>
<thead>
<tr>
<th><strong>Display Action Column</strong></th>
<th>Select to display the Action column in the Admissions section on the Student Center page. The Action column can display the What’s missing link and the Accept/Decline link.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Display what’s missing link</strong></th>
<th>Select to display the What’s missing link, which accesses the to-do list.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Display Accept or Decline link</strong></th>
<th>Select to display the Accept or Decline link, which accesses the Accept Admissions page.</th>
</tr>
</thead>
</table>

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Holds Section

Show <> holds at a time
Select the number of holds that you want to display at one time. You can display all holds or from 1 to 10 holds. The system sorts holds by date—most current to oldest—on the Student Center page.

Display monetary value
Select to display the monetary value of the holds on the Student Center page.

To Do List Section

Show <> To Do’s at a time
Select the number of to-do items that you want to display at one time. You can display all to-do items or from 1 to 10 to-do items. The system sorts to-do items by earliest due date on the Student Center page.

Advisor Section

Show advisor phone number
Select to indicate whether to use an advisor’s preferred phone number or a particular phone type when displaying the advisor’s phone number in the Advisor section of the Student Center. This setup controls the phone number on the Student Center page only.

Note. You should select the same Advisor phone number value on this page and on the Other page in the Student Records component.

Links Section

Use this group box to define link sections that will be available on the Student Center page. By defining sections and URLs, you can provide links to institution websites such as University Library, Campus Directory, University Home Page, Free Application for Federal Student Aid (FAFSA), and others. You can define three sections with a maximum of three URLs per section.