Purpose Statement:
This document provides an overview of features and enhancements included in PeopleSoft Enterprise Campus Solutions 9.0 Additional Features April 2011. It is intended solely to help you assess the business benefits of deploying the contents of Additional Features April 2011 and to plan your IT projects.

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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.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Summary</td>
<td>3</td>
</tr>
<tr>
<td>Overview Campus Solutions 9.0 Additional Features April 2011</td>
<td>4</td>
</tr>
<tr>
<td>Planned Graduation Processing Enhancements</td>
<td>4</td>
</tr>
<tr>
<td>Graduation Tracking Page</td>
<td>4</td>
</tr>
<tr>
<td>Graduation Tracking Batch Process</td>
<td>6</td>
</tr>
<tr>
<td>Graduation Processing Batch Page</td>
<td>7</td>
</tr>
<tr>
<td>Self Service Apply for Graduation</td>
<td>8</td>
</tr>
<tr>
<td>Self Service Graduation Status</td>
<td>9</td>
</tr>
<tr>
<td>Planned Graduation Setup – Institution Page</td>
<td>10</td>
</tr>
<tr>
<td>Graduation Setup – Career Page</td>
<td>12</td>
</tr>
<tr>
<td>Graduation Setup – Program Table</td>
<td>12</td>
</tr>
<tr>
<td>Planned Post-Enrollment Requirement Checking</td>
<td>13</td>
</tr>
<tr>
<td>Enrollment Requirement Roster page</td>
<td>14</td>
</tr>
<tr>
<td>Post Enrollment Requirement Checking Batch Process</td>
<td>15</td>
</tr>
<tr>
<td>Communications</td>
<td>17</td>
</tr>
<tr>
<td>PERC Setup – Student Records Installation Pages</td>
<td>18</td>
</tr>
<tr>
<td>PERC Setup – Enrollment Requirement Roster Page</td>
<td>19</td>
</tr>
<tr>
<td>PERC Setup – Enrollment Requirement Processing Page</td>
<td>21</td>
</tr>
<tr>
<td>PERC Setup – Comment Type Setup</td>
<td>22</td>
</tr>
<tr>
<td>Planned 3C Delete Policy Manager</td>
<td>23</td>
</tr>
<tr>
<td>Planned Ad Hoc Section Association</td>
<td>24</td>
</tr>
<tr>
<td>Planned Financial Aid Loan Period and Academic Year Start &amp; End Dates Updates Process</td>
<td>25</td>
</tr>
<tr>
<td>Conclusion</td>
<td>27</td>
</tr>
</tbody>
</table>
Oracle is committed to the success of its higher education customers and is backing up its commitment with Additional Features April 2011 by planning significant customer-driven product enhancements to:

- Protect your investment
- Extend value
- Evolve your product footprint

Executive Summary

This document provides an overview of the new features and enhancements planned to be delivered in Oracle’s PeopleSoft Campus Solutions (CS) 9.0 Additional Features April 2011. It is a preview of what we are planning to deliver, intended to help you understand the new features and to assess if they will meet your needs in order to help you plan your IT projects and investments.

The new features and enhancements intended in this Additional Features bundle are grouped by business processes 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. Additional resources are planned to help your organization determine the impacts of implementing these additional features. Visit My Oracle Support frequently to keep apprised of resources as they become available. These planned resources include PeopleBooks, Transfer of Information, and Advisor Webcasts.

The delivered additional features may not have every feature or capability mentioned in this document, and a specific feature may become part of a different application or have a different product name than those cited in this document.
Overview Campus Solutions 9.0 Additional Features April 2011

Planned Graduation Processing Enhancements

Institutions of Higher Education have a vested interest in efficiently and accurately approving students for graduation. Not only does it influence how the graduating students – the institution’s future alumni – perceive the institution, but more and more institutions are finding their state or district funding tied to how quickly they are able to graduate students. It is imperative that institutions have an efficient and flexible process to support the graduation clearance process.

In order to provide enhanced support for the Graduation clearance process, Oracle plans to deliver enhancements in the following areas:

- New batch process to identify potential candidate for graduation based on your institution’s unique requirements.
- New, optional, Graduation Tracking page to provide a single place to review the student’s data and their progress through the graduation clearance process.
- Enhanced self service “Apply for Graduation” functionality.
- Configurable setup options to tailor the process to meet your institution’s business processes and requirements.

Our planned design leverages much of the existing setup and data structures within Campus Solutions. The Student Program/Plan stack remains the “source of truth” with respect to the student’s overall status and the current Degree table remains intact, thereby minimizing much of the impact of these planned enhancements on existing functionality and reports. Similarly, the planned enhancements are not dependent on using other modules, such as Academic Advisement.

Graduation Tracking Page

We are planning to deliver a new, optional, Graduation Tracking page to provide you with an overview of the potential graduate and to facilitate clearing that student for graduation. By presenting your users with a comprehensive set of data necessary to make a decision about the student’s eligibility to graduate all on a single page, your institution can achieve greater efficiency and meet what are often very tight and inflexible deadlines for finalizing the graduation roster.
## Graduation Tracking

**Fern Smith**  
**Student ID:** SRGR0002

**Academic Career:** Undergraduate  
**Academic Program:** Liberal Arts  
**Institution:** PeopleSoft University  
**Exp. Graduation Term:** 2011 Spring  
**Degree:** BA  
**Field of Study:** Mathematics (BA)

### Academic Plan

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<th>Term</th>
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<th>Subject</th>
<th>Catalog</th>
<th>Description</th>
<th>Official Grade</th>
<th>Grad Note</th>
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### Graduation Notes

**Sequence:** 10  
**Graduation Note:** 

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### Notes

**Sequence:** 10  
**Formal Description:**

---

### Special GPA

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<th>Academic Plan</th>
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### Course Credits

**Transfer Model:**  
**Model Name:**  
**Articulation Term:**  
**Description:**  
**Model Status:** Submitted  
**Degree:** Liberal Arts Undergraduate  

---

### Test Credits

**Transfer Model:**  
**Model Name:**  
**Articulation Term:**  
**Description:**  
**Model Status:** Submitted  
**Degree:** Liberal Arts Undergraduate  

The planned page is configurable (see setup pages below) to enable the display of individual sections for enrollments, cumulative academic statistics, milestones, transfer credit, honors, and graduation notes to meet your business needs. From this page, you not only will be able to view relevant data to clear students for graduation, but you also will be able to update the student’s graduation status, enter graduation notes, and enter graduation honors.

The Graduation Review Status allows you to define and track the student’s progress through the review and clearance process. These statuses are configurable by your institution to meet your business process needs and can be maintained manually or in batch using Population Selection / Population Update.

The Graduation Tracking page can be created three different ways: in batch, via the self-service Apply for Graduation functionality, or manually.

In addition, by clicking on the View Status History button, you can view an online audit trail of each change to the Review Status and Status Date for that student, along with the date/time stamp of the change and the User ID of the user making the change.

**Graduation Tracking Batch Process**

To streamline and provide automation to the graduation clearance process we are planning to deliver a Graduation Tracking Batch process. This batch process will insert a row into the Student Program/Plan stack with a Program Action of ‘DATA’, the Degree Checkout Status equal to ‘In Progress’, and the Program Action Reason and the Expected Graduation Term based on the Run Control and setup parameters. In addition, if your institution is using the new Graduation Tracking functionality, the process will create the Graduation Tracking record, setting the Graduation Review Status field based upon the Run Control parameters. The process can be run repeatedly to maintain the various Graduation Review Statuses based on your population selection criteria.

In order to provide the most flexibility possible, we are using Population Selection to identify the population of students for the batch process to create the Graduation Tracking record and maintain the Graduation Review Status. Institutions will use a variety of criteria to identify students to port into the graduation clearance process. Some of the criteria that we have gathered from our customer focus groups include looking at the number of terms enrolled, the number of units/credits completed or the number of courses completed. Others indicated they might want to look at the results tables by running the degree audit process in the Academic Advisement module. Again, there is no dependency on the use of the Academic Advisement module nor is there any direct connection to the degree audit results other than what can be defined using Population Selection.
Graduation Processing Batch Page

The Graduation Processing page allows you to update the Degree Checkout Status on the Student Program/Plan stack for a specific population of students. The Degree Checkout Status continues to be the “official” status that governs the posting of the degree as well as the status the student can view in self service and allows you to update this status as necessary to reflect the results of the Graduation Tracking process.
You can define the populations of students for whom you wish to run the process using Population Selection. When you identify the name of the Query you wish to use, you can click on the Load Selection Results link to populate the grid in the Selection Results group box. From here, you can further manage the population by deleting some students or manually adding others. Alternatively, you can bypass Population Selection and manually identify the population of students by clicking on the “Add Students” link and manually entering a list of EMPLIDs to include in the process.

You can also use this process to update the Degree GPA, Degree Honors, and Expected Graduation Term fields on the Student Program/Plan stack for individual students, saving you time from accessing each individual student’s record and updating the fields one by one.

**Self Service Apply for Graduation**

Many institutions require potential graduates to apply for graduation or to confirm their intent to graduate. We plan to deliver enhanced self service pages to support the ability for the student to submit an application for graduation online. These enhanced self service pages will include the ability for the students to submit their applications for graduation, including the specific program from which they intend to graduate along with the expected graduation term. The instructional text on the page is configurable by your institution via the PeopleSoft Message Catalog.

We also recognize that some institutions may want to limit when students can submit an application for graduation. For example, many institutions want to restrict the Apply for Graduation link and pages to seniors or to students who are close to being ready to graduate. To support this, we plan to deliver new functionality to restrict the Apply for Graduation link and pages to eligible students, as defined by your institution (see Graduation Setup – Institution section below).
Self Service Graduation Status

Once the student has submitted the application for graduation, the system updates the Student Program/Plan stack and, if your institution uses it, the Graduation Tracking page. As you maintain the various statuses throughout the review and clearance process, the student is able to view the Degree Checkout Status via the self service pages. On the Graduation Setup – Institution page we plan to deliver (see below), you can override the delivered descriptions so that you can provide a more meaningful message to the student.
We also plan to deliver new functionality to enable the student to review the status of their graduation application as well as be able to update their name and address information. By clicking on the link to change their name or address for the diploma, the student can review their various names and addresses on the existing self service names and address pages in Campus Community.

Since the name and address that displays on the Graduation Status page may not be the diploma name or address, and the fact that the student will be presented with all available names and addresses when they access the Campus Community pages, we recommend that you provide text on the Graduation Status page that instructs the student about which name type will be displayed on the diploma and to which address type the diploma will be mailed (see the Graduation Setup – Institution page below for additional information).

**Planned Graduation Setup – Institution Page**

The planned Graduation Setup – Institution page provides a number of sections that control how the graduation functionality will work for your institution. If you are in a multi-institution environment, these settings will govern all the institutions within your environment.

![Graduation Tracking](image)

The first section we plan to include on the Graduation Setup – Institution setup page controls whether or not your institution will use the new Graduation Tracking functionality. By placing a check, or tic, mark in the Use Graduation Tracking field, the Graduation Tracking Batch process and the self service Apply for Graduation pages will create the Graduation Tracking record in addition to inserting new DATA rows into the Student Program / Plan stack.

In the Graduation Review Status field, select the value you want to use as the default status when the Graduation tracking record is first created.

The remaining fields indicate which sections you want to appear on the Graduation Tracking page. Place a check, or tic, mark next to those sections you want to appear on the page.

Also planned for the Graduation Setup – Institution setup page is a group box to manage the self service Apply for Graduation pages.
The Self Service Eligible to Apply checkbox is a new parameter we are planning to deliver. We know that many institutions do not want students applying for graduation until they are, or think they are, eligible to do so. By placing a check, or tick, mark in this box, you will restrict the Apply for Graduation link to appear in self service only for those students who have a Degree Checkout Status of Eligible to Graduate. You can set this value using Population Selection / Population Update, which allows you to use whatever criteria are appropriate for your institution (e.g., all seniors, all students who have completed six semesters, all students who have completed 90 credits and who have completed their community service milestone). If you do not activate this option, the Apply for Graduation link will behave as it always has and will appear for all students.

The Program Action Reason is the default code that you want assigned when the student submits the application to graduate via self service.

The name and address configurations control which Name and Address Types display on the self service Apply to Graduate pages. The configurable link labels allow the student to go to the Campus Community Name and Address pages to make any changes, or to enter a specific Diploma name or address, for example. When the student uses one of those links, they will be taken to the existing Names and Addresses pages in Campus Community. Those pages display all name/address types. If you require the student to update a specific Name Type (e.g., Diploma), we recommend that you use the Graduation Name Address Message box to provide appropriate instructions to the student. Also, the way the student’s name displays on the self service Graduation pages may not be exactly as the student has entered it. This is due to the standard functionality for displaying names. Again, you may wish to provide appropriate instructions to the student explaining that although the full name may not display on the Graduation page, it is still saved and will be printed on the diploma as the student has entered it on the Names page.

Finally, we plan to include on the Graduation Setup – Institution setup page configuration options for the text that will display to the student in self service for the Degree Checkout Status.
If you wish to provide the student with a more meaningful description of the Degree Checkout Status, you can enter that text in the field next to each delivered status. You may find that you do not wish to display some statuses to the student (e.g., Denied), in which case you can provide a more meaningful, or perhaps more sensitive, description for the student. If you do not want to use your own descriptions, you can leave the text field blank and the system will display the delivered descriptions.

**Graduation Setup – Career Page**

The planned Graduation Setup – Career page allows you to override the Institution-level configuration for individual Academic Careers. Use of this setup page is optional.

**Graduation Setup – Program Table**

Like the Graduation Setup – Career page, the Graduation Setup – Program page allows you to override the Institution and Career-level setup for an individual Academic Program. Use of this setup page is optional.
Planned Post-Enrollment Requirement Checking

Enrollment requirement checking includes in-progress credits towards satisfying class pre-requisites. (Note: in-progress courses can be excluded at the individual parameter level within a requirement group). Since there is no grade for the class, the system assumes the student is still in progress and that he or she will successfully complete that class. This allows students to enroll in a course before they have actually received a grade in one or more of the required classes. In a typical scenario, a student may be actively enrolled in MATH 100 for Fall 2009. Towards the end of the Fall term, before Fall classes are completed and grades posted, the student enrolls for Spring 2010 and enrolls in MATH 120, which requires a grade of at least a “C” in MATH 100. Since the student is still enrolled in MATH 100 (the course is considered “in progress” since there is no grade posted for it yet), the system allows the student to enroll for MATH 120 successfully. Unfortunately, all students may not successfully complete their classes so you have no way to re-evaluate pre-requisites once a student is enrolled. The alternative is to exclude any “in progress” courses from being considered as a pre-requisite, but of course this has the undesirable effect of delaying enrollments and preventing students from enrolling in necessary or desired classes, causing additional frustration or even delaying the student’s progress to graduation.

In order to support provide you with a better and more flexible alternative and to allow you to appropriately enforce your institution’s academic standards and requirements, we are planning to deliver a new feature called Post Enrollment Requirement Checking. This feature provides you with the ability to re-evaluate pre- and co-requisites after the student has enrolled and grades have been posted. At a high level, this new feature enables:

- The system to identify and store the result, or status of the requirement check at the time of enrollment (e.g., satisfied, not satisfied, contingent, overridden, permitted, enrollment page).
- You to re-run the current Enrollment Requirement Checking process on enrolled classes, both online for an individual class as well as in batch.
- You to view the results of the post-enrollment requirement check and take action on those results.
• You to identify and drop a student from classes as a result of post-enrollment requirement checking and notify that student via Communications.

We are planning to deliver ways for you to run the Post-Enrollment Requirement Checking (PERC) process for an individual Class via the Enrollment Requirement Roster page, or in a batch process using Population Selection to identify the classes to include in the process.

**Enrollment Requirement Roster page**

The Enrollment Requirement Roster page allows you to run the Enrollment Requirement Checking process for an individual class. The page is available to you if you have enabled PERC processing on the Student Records Installation page. In addition, you have the option of enforcing Academic Organization Security to prevent users from running the processes for classes for which they are not authorized.

The grid in the middle of the page displays the class members who have not fully met the enrollment requirements. From here, you can select one or more students from the class by placing a check, or tie mark in the checkbox in the Select column of the grid, or click on the link to Select All. Scrolling to the bottom of the page—or using the Run Post Enrollment Requirement Checking link at the top of the page—to jump to the section at the bottom of the page—you then click the Run button to initiate the PERC process for the selected population of students. You can also select parameters to control setting the Drop Request Indicator for students who are in non-compliance as the result of running the PERC process.
Once the process has run, the roster page displays the Drop Request Indicator. This indicator is displayed in an updateable field so that you further review it and override it if necessary—and if your security allows it. You can then choose to send the non-compliant students a warning communication or to immediately drop them from the class based on your institution’s policies.

Once you have reviewed the non-compliant students, made any overrides, and communicated with them as necessary; you can scroll to the bottom of the page—or click on the Process Drops for Non-Compliance link at the top of the page to jump to the section at the bottom of the page—and choose the appropriate selection parameter and initiate the process by clicking on the Run button to process the drops for the selected population of non-compliant students. When the system processes the Drop Request through the PERC process, it saves the drop regardless of the Drop Delete Date defined on the academic calendar, and it assigns a drop reason code identified by you as part of the setup (see below). In addition, once you have dropped the non-compliant students, you can send them a notification of your action.

**Post Enrollment Requirement Checking Batch Process**

In addition to the PERC roster page and process for an individual class, you can chose to run the process in batch for a group of classes.
On the run control page, you select from a variety of parameters to select the population of students to include in the process. You may choose only students who are enrolled, and/or students who are on the waitlist so that you are maintaining the waitlist only for eligible students. You can then indicate the action to take for setting the Drop Request Indicator on these students if the PERC process determines they are non-compliant. You then identify the classes against which you want to run the process using Population Selection or by manually entering individual class numbers. Again, you can choose to send a warning notification to the students of their non-compliance if you wish.

Once you have run the process, you can run the batch process to drop the non-compliant students. Based upon your setup parameters on the Student Records Installation page, you can limit this drop action to those students for whom you have completed a review of their status. You can further limit the process by defining a population of classes using either Population Selection or by manually entering class numbers. And, as with the other processes, you can send the dropped students a notification using Communication.
Communications

Most institutions want to communicate with their students about various administrative actions, especially for changes to enrollment, tuition charges/billing, etc. We plan to deliver additional functionality to support these communication requirements for the PERC process. These communications will use email as the primary communication method and letters to those students who do not have email.
To support communications to students as the result of the PERC process, we plan to deliver a new Administrative Function of SENR, which uses student enrollment data for the variable data. The variable data will be extracted by implementing a new abstract class SCC_COMMGEN:Model:CommGenDSAbstract.

In order to generate these communications, you assign the individual communication code to the target students using the 3C Engine with a Population Selection query to identify the specific students to receive the communication. In addition, you will be able to add individual students into the 3C Trigger Event Table to be picked up by the 3C Engine. After you run the 3C Engine to insert data into the Communications table and remove any possible duplicates, you will run the CommGen process to create the actual data.

We plan to deliver sample templates for the letters as well as samples for the Population Selection queries.

**PERC Setup – Student Records Installation Pages**

On the Student Records Installation page, we plan to add a new option impacting the enrollment process. If a student conditionally satisfies an enrollment requirement, you can now select to have a warning message returned to the student so that he or she is aware that they need to successfully complete the in-progress course requirement.
PERC Setup – Enrollment Requirement Roster Page

We also plan to add a new setup page to the Student Records Installation component to control the Enrollment Requirement Roster. The top half of the page (shown below) includes setup options to manage and control the Enrollment Requirement Roster page, including the default behavior of the collapsible sections, default filter settings for the grid, drop review requirements for batch processing, and the default drop reason code.
The bottom half of the page (shown below) includes configuration options for additional information available via links on the roster. These options can facilitate the review process by making additional, pertinent information more readily accessible to the reviewer. In addition, the setup page includes an option to enforce Academic Organization Security on the administrative pages as well as the batch process, and an option to allow notes to be, or not be, deleted.
**PERC Setup – Enrollment Requirement Processing Page**

The Enrollment Requirement Processing setup page allows you to define parameters and default options for the PERC processes for re-checking requirements and drop processing.

The top portion of the page (shown below) allows you to define options and defaults for running the processes directly from the Enrollment Requirement Roster page. The option to Allow Override of Action Date also works in conjunction with Enrollment Security. The Processing Limit setting provides controls to enhance performance by placing limits on the number of students that can be processed at one time. For large numbers of students, we recommend using the batch process to improve performance.

The bottom portion of the page (shown below) provides setup options and defaults for running the batch processes. The option to Allow Override of Action Date also works in conjunction with Enrollment Security.

The final section on the page allows you to define the default Communication Category for PERC communications. We plan to deliver the value PERC.
**PERC Setup – Comment Type Setup**

You have the ability to enter predefined Comments, or Notes, on the Enrollment Requirement Roster to document the reason for a specific action for an individual student (e.g., approved, denied or other PERC-related notes).

![PERC Setup – Comment Type Setup](image-url)
Planned 3C Delete Policy Manager

As part of our ongoing enhancements to help manage the deletion of the 3Cs, we have planned to deliver the ability to delete Communications, Checklists and Comments both individually and using batch processes in order to help manage table space sizes for the 3C tables. In addition to these bulk and individual delete capabilities, however, customers need a more autonomous solution that would allow a “super” user to set broader parameters for deletion and to have the deletion activity occur on a scheduled basis.

This planned enhancement provides the ability for super users to be able to purge communications, checklists and comments data according to broader parameters, and also introduces the ability to define 3C Deletion exceptions based on service impacts – meaning, you can prevent the deletion of an individual’s data who may meet the parameters of the run control. These exceptions also apply to the previously delivered 3C Deletion functionality. This enhancement also holds checklist rows on the Checklist Summary person and organization pages.

The planned 3C Deletion Policy Manager component, SCC_3CD_POL_MGR, is a run-control component that specifies the parameters for deletion. This component calls a new app engine process called SCC_3CD_PMGR, which will use the deletion criteria specified in the Parameters grid to determine the items to be deleted. Since access to this component is restricted to only those users with super user access (via PeopleTools), no 3C Security has been implemented. As a result, an authorized user will be able to select all the available values within an Institution for the Communication Category, Communication Context, Letter Code, Checklist Code, Checklist Status and Comment Category attributes. The parameters can be as broad or as narrow as suits your situation.

Some of the controls illustrated in the sample screen shot above include:
- Run control is keyed by Institution.
- Effective Date and Status allow you to control when this set of parameters is deployed.
- The grid is dynamic and adjusts which fields are displayed, based on the 3C Type.
- Threshold value (days) enables recurring deletion schedule.
- Parameters can be very simple or complex, with multiple rows for each type of 3C and varying threshold values.
- Upon saving the run control, the SQL sorts the rows according to Type, in order of Communications, then Checklists, then Comments. Within that sort, the rows are sorted from broadest to most detailed.

The screen shot below shows an example of a complex run control. You read the rows from the top down, using “unless” as the logic between each row.
Planned Ad Hoc Section Association

The existing Student Records cross-listed, combined sections functionality is supported with SAIP integration. However, customers have indicated that they needed the ability to associate class sections ACROSS course offerings. The goal of this enhancement is to enable faculty members to combine course sites in the LMS that aren't formally associated in Student Records as combined sections or multi-section classes. You will be able to associate any given class section with, at most, one other section (this new functionality does not support a one-to-many or many-to-many association).

For example:

- A faculty member teaches an undergraduate class and a graduate class, both on philosophy of language, in the same semester. The professor wants both classes to share the same course shell since their content overlaps significantly.
- An instructor who teaches Calculus 101 and 102 classes wants the two classes to share the same course shell so that 102 students can continue to have access to the 101 content.

For each Institution and Term event, the faculty member will be able to define a Section Association ID, along with a Description, and then add the sections which should be associated into a single course site. All page logic regarding scoping and targeting will be identical to that of the existing Associate Combined Sections page.
The planned new page is shown below:

When the user selects View/Edit Associated Sections, this sub-page appears. Note that the user can indicate which Targets are intended for each set of associated sections.

**Planned Financial Aid Loan Period and Academic Year Start & End Dates Updates Process**

Many institutions have different definitions of academic years and different loan periods for individual Academic Careers or Programs. To facilitate and streamline financial aid loan processing for these institutions, we are planning to deliver a new process to update the default Loan Period Start and End Dates and the Academic Year Start and End Dates on the Loan Origination record.
The Run Control for this new process allows you to process multiple populations during a single run. By using Population Selection, you can define the specific population of loan records to be updated, including only those for students in a specific Academic Program.

The grid at the bottom of the page allows you to enter the specific Disbursement Plans to be updated. You can populate this grid in two ways.

First, you can manually enter the Disbursement Plan IDs into the grid. When you tab out of the field, the system will populate the date fields based upon the default dates based on your setup for the specified Institution, Aid Year, Career and Disbursement Plan combination. You can then modify the specific dates that need to be changed. If you leave a date field blank the system will ignore that field and leave it as whatever date currently exists on the student’s loan record.

The second way to populate the grid is by clicking on the Populate button, which will populate the grid with all Disbursement Plans and the default dates for the specified Institution, Aid Year and Career. You can then update the necessary date fields (or delete the value if you do not want to update that field), or delete rows as necessary.

The process will only allow dates to be updated for eligible loan records. Eligible records will be determined based on what status the loan is currently in (Origination Pending, etc…).
Conclusion

The planned enhancements included in this Additional Features bundle under the new Continuous Delivery Model illustrate Oracle’s commitment to bring a forward-thinking approach to how we provide enhanced capabilities for our customers. The Continuous Delivery Model is designed to deliver enhancements to the functional departments sooner. We encourage all business areas to evaluate the content of this Additional Features bundle for applicability to their business processes.

The PeopleSoft Campus Solutions 9.0 Additional Features April 2011 is intended to meet customer needs, industry best practices, analysts’ recommendations, and Oracle’s own commitment to and leadership in the education industry.