PS Campus Solutions Glosarry [1]

August 10, 2016 by Sunny Mekala [2]

A

Academic Advisement - PeopleSoft's Campus Solutions Degree Audit module.

Academic Career - Represents a body of work undertaken with a specific academic objective in mind and contains characteristics of students, courses and terms. For courses, careers are used to distinguish undergraduate from graduate course levels. CU has many academic careers: (undergraduate, graduate, law and medicine). Depending on the Academic Career, applicants are eligible for specific Academic Programs, Plans and Sub-Plans that fall underneath the career. Credit Level

Academic Institution - An individual university or college, working with the same course catalog and showing on the same transcript. CUBLD is one academic institution.

Academic Interest - A subject area in which a prospect or applicant has indicated interest.

Academic Group ("group level" Academic Organization) - The highest level within an academic institution offering courses; the Group is the entity that offers the course. (College)

Academic Organization - For data entry, the UC college is what is entered in the Academic Organization field. In this context, you can think of the Academic Organization as the administrative unit that manages courses offered within a specific academic subject.

Academic Plan - An area of study within a Career/Program resulting in awards that are directly associated with the Program.

Academic Program - An academic entity to which a student applies, is accepted, and from which the student graduates. Programs drive business rules and allow for differentiation between admission rules, graduation processing, academic level/load rules, enrollment rules, financial aid eligibility and disbursement rules and priority rules for students in multiple programs.

Academic Structure - The group of setup tables in the PeopleSoft system that defines your institution to the PeopleSoft Student Administration system. It is the foundation for all components of the system, representing the institution's physical and logical academic structure.

Account Type - Account types classify item types into usable account groupings. Differentiating charges into multiple accounts enables flexibility in billing and assessing late fees. For example, creating a separate account type for housing enables you to bill and

assess late fees for housing charges differently than you do for tuition charges.

Accounting Date - The date a transaction is recognized in the financial system as opposed to the date the transaction was entered into the system (although the two dates can be the same). The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date on a transaction in the SubModule may be different from the Journal Date, depending on configuration decisions. It can also be updated anytime until the transaction is posted.

Accounts Receivable - The record of money that is owed to the University.

Action Reason - Used in conjunction with a Program Action to indicate why a particular program action was taken or offer a further description of the program action.

Activate - A student is ready to either enroll in a term or be evaluated for transfer credit.

Adjustment Calendar - How student fees get refunded after that student's withdrawal. Controls how a particular charge is adjusted on a student's account when they drop classes or withdraw from a term. The charge adjustment is based on how much time has elapsed from a predetermined date and applies by percent of the original charge amount.

Administrative Function - A functional area within the PeopleSoft Student Administration application, such as LOAN (a Financial Aid function), that defines key data fields — the variable data — to be associated with communications in a particular communications category.

Admissions and Recruitment - PeopleSoft's Campus Solutions Admissions module.

Admit Type - A designation used to distinguish first-year applications from transfer applications.

Aging - See Credit History.

B

Billing and Due Calendar - Billing and due date calendars are associated with tuition calculation and are used to determine the percentage of specific fees due to be paid by a particular time. Because a due date calendar is required for the setup of fees, you must define at least one billing and due date calendar for your institution. You can also define additional billing and due date calendars as needed to meet the requirements of your business processes.

Billing Process - One method used to assign a due date to a charge when a due date does not exist. Every billing charge (i.e., instructional fee) that appears on a student's bill is assigned a due date. It is important to understand due dates for charges can vary depending on when a charge was added to a student's bill. It is possible for a student to have more than one due date for a single semester bill based on when the individual charges were added. For example, the bill due date for tuition and fees can differ from the bill due date for student health insurance.

Bio/Demo Data - Information that identifies a person, such as: name, birth date, gender, citizenship, ethnicity, address and telephone number; biographical/demographical data.

Breadcrumbs - The navigation shown across the top of the workspace that allows for backwards and forward navigation from any point in the navigation path.

Business Process - Written descriptions of steps to be followed to accomplish a specific business-related task.

Business Unit - An operational subset of an organization. For Student Financials, the business unit is the framework that controls all processing within the Student Financials module. Business units have their own sets of business rules, allowing them to operate independently from each other financially. UCB has one business unit: UCB01.

C

3C Group - A broad grouping of users to be allowed access to a particular administrative function for use in creating communications.

3Cs - Stands for Communications, Comments, and Checklists.

Campus - Defined within an institution as where the academic groups manage their courses. It also refers to the place where students can receive a full complement of services.

Campus Community - The central repository of the PeopleSoft system for data that is shared across the three main business areas of Human Resources, Contributor Relations and Student Administration. It is used to manage biographical and demographical information on people and organizations, known as Bio/Demo data. All the processes and activities you perform in the PeopleSoft system are performed in relation to records for individuals in Campus Community.

Campus ID - Unique student identifier by which a student's record is accessed.

Campus Location - See Campus.

Campus Solutions - PeopleSoft's term for its Student Information Services software module.

Career - See Academic Career.

Catalog Number - Number assigned to a course that appears in the Course Catalog. This number is typed in. For instance, for Math 1101, the number "1101" is the Catalog Number.

Chartfields - The individual components, or fields, that when combined make up the ChartField String, which defines the accounting structure.   Chartfields include account, fund, department ID, project, activity, etc.

Chartstring – A set of chartfields "strung" together to represent the proper categorization of a financial transaction. The use of multiple chartfields allows for flexible reporting of the financial aspects of projects, activities, programs, events, etc.

Checklist 3C Group - A collection of 3C groups linked to a particular checklist code.

Checklist Item - An object or a task that represents one of the entries on a list of documents to compile or jobs to be done. An example would be the Free Application for Federal Student Aid, which is listed on the checklist of documents required to complete an application for financial aid.

Class - Specific instances of the time, place and term of a course. Students enroll in classes. Grades are based on classes.

Class Number - Unique number assigned to a class. A class is a specific instance of the time, place and term of a course.

Comment Category - The link between a specific comment and an administrative function. It determines who has access to certain comments.

Comment 3C Group - A collection of 3C groups associated with a particular comment category.

Communication - A contact between an individual and UC such as a phone call, letter or campus visit.

Communications 3C Group - A collection of 3C groups linked to a particular communications category.

Communications Category - A group of communications contexts tied to functional processing such as communications with financial aid recipients. Categories are made up of 3C Groups, so the Groups must exist before the categories can be created.

Communications Context - Describes the type of communication, how it was made and in what direction (incoming or outgoing). For example, a student's billing notice is an outgoing communication that could take place by telephone, email, U.S.

Communications Speed Key (Comm Key) - A communication shortcut used to quickly enter a predefined communications context with its related method, direction and letter code.

Component - A collection of pages related to a particular PeopleSoft task. Example: Find an Existing Value, Add a New Value and Test Tables are pages in the Test Tables component.

Concentration - See Sub-Plan.

Constituent Relationship Management (CRM) - A software tool that provides the university

new and enhanced capabilities to send personalized communications to constituents using multi-channel communication technologies. The institution can: Establish and strengthen relationships with constituents throughout the entire student lifecycle; deepen its understanding of the students' interests and individual needs; and deliver comprehensive events planning and management, and yield analysis.

Contact Code - See Communication.

Contributor Relations - Manages constituent data for both current supporters/donors and prospects. (UC equivalent: Alumni Relations)

Corporate Account – External Org account

Course - Record in the PeopleSoft system representing the instruction students receive on a subject at an academic institution; shows what is being taught, the structure for reporting and credit awarded for successful study.

Course/Class Component - Format and location type of the course, such as lecture, lab, or seminar.

Course IDs - Permanent, unique number assigned automatically to each course as it is created in the PeopleSoft Course Catalog. This number is not typed in. This six-digit Course ID is attached to a course when the course is created, and this same Course ID stays attached to that course forever.

Course Number - See Catalog Number.

Credit History - Ages unpaid services not satisfied on a student's account.

CRM - See Constituent Relationship Management.

Customer Account - Student account

Customization/Extension/Modification - Also called extension, a technical change to an out-of-the-box PeopleSoft system. For example, adding fields to a page, changing the logic of the application, and rearranging a page are all examples of customization. These can range from simple to very complex. Also known as modification.

D

Department - The Department ChartField represents the detailed breakdown of campus organization structures. Combined with other ChartField values, they form the basis for department budgets that track expenditures and revenues.

DPP – deferred payment plan

Due Date - An alternative to Due Days, wherein a specific deadline date is specified for completion of a checklist or checklist item.

Due Days - The interval of time between the date a checklist or a single checklist item is assigned and the date by which it is supposed to be complete.

E

Effective Date - This is the date the PeopleSoft production system uses to determine when a row of information becomes active. Automatically defaults to the system date (today's date). It may be overridden to reflect a prior or future date.

EMPLID - Unique identifier for each person entered into Campus Solutions.

Equation Variable - Equation variables are user-defined variables that you can use to classify students when no standard system values are available. For example, you might need to calculate a fee for students involved in summer internship programs. You could define one or more variables to use to identify the students and calculate the appropriate fees.

Event - A program sponsored by UC that can have one or more meetings with specific times and locations.

Event Type - A generic category attached to multiple specific events.

External Org ID - Unique system-generated number when a new external organization is first added and saved.

External Organization/Third Party/Corporation or Corp - Entities that are outside of UC, such as schools, businesses or non-profits with which UC does business. In Admissions and Student Records, this would be a high school, college or university.

F

Filter - In student reporting dashboards, a dynamically-applied restriction on data previously returned by the processing of a report. Also known as a local limit.

Financial Aid - PeopleSoft's Campus Solutions Financial Aid module.

Fit/Gap - The process of analyzing where a new system "fits" with an organization's business processes and where there are "gaps" between the system's functionality and the organization's business needs. A "fit" occurs when the organization's needs are met by the new system. A "gap" occurs when variances exist between the organization's needs and what the new system delivers. Functionality variances deemed critical to UC's mission can typically be addressed by end user training, interfaces between systems or system modifications.

G

General Ledger - A record of financial transactions over the life of an institution. The general ledger holds information needed to prepare financial statements. It contains accounts for assets, liabilities, revenue, expenses, etc.

General Ledger Module - The module that provides for recording of financial transactions. The basic building block of the General Ledger is the chart of accounts, the data the system needs

to capture on all transactions.

G/L Interface General Ledger Interface - The process of sending transactions from Student Financials to the General Ledger. Item Types are mapped to specific General Ledger Accounts, enabling transactions to move to the General Ledger when the G/L Interface process is run.

Go-Live - The moment in time when a new module is first made available online for end-users.

Group Post – batch process for posting a group of transactions students' accounts.

H

Holds - See Service Indicators.

I

Institution Set - You use institution sets to define basic institution set parameters and to set up ePayment rules for institution sets. This setup is done in Campus Self Service.

Interface - A computer program whose purpose is to transfer data from one system to another.

Integration - Coordinating data from different sources so it moves seamlessly from one module to another.

Item Type - Identifier (12 characters) that classifies an item on a student's account. Item Types enable schools to uniquely categorize a student's bill and/or financial aid. The determining factor for creating an item type or using an existing item type is the mapping to the General Ledger and how a breakdown occurs on a student bill. Item types are the basic work unit of Student Financials. In addition to defining transactions which can be posted to student and third party accounts (such as charges, payments, waivers, financial aid, etc.), item types also store the information required for transferring financial data to the general ledger.

J

Journal - A batch of accounting entries entered online or input from a feeder system (payables, receivables, asset management, and so on) to the General Ledger. Consists of multiple journal lines and one Journal Header, identified by the Journal ID. Information about the journal as a whole is stored in the Journal Header table.

Journal Line - A record storing one line of a double-sided, balanced entry for a given journal. The sum of the monetary amounts for the journal lines in one journal totals zero (debits = credits).

Just-in-Time Training - Training on any given task that is offered as closely as possible to the actual time when a user will begin using the new system to accomplish that task.

K

L

Ledger - A set of posted balances that represent a set of books for a business unit. PeopleSoft General Ledger supports detail, multiple, and summary ledgers.

Legacy Systems - The computer software structures that have evolved over the years at UC such as UniverSIS.

Load/Edit Parameters - The criteria used to select records to be processed.

Local Limit - In student reporting dashboards, another term for a filter.

M

Major - See Academic Plan.

Meeting - An individual session within a single event.

Meeting Template - Represents all of the meetings that could be used when planning a specific event with the attached event type. The meeting templates specify details about the meeting, such as the meeting type.

Minor - See Academic Plan.

N

National ID - Identification code used by countries to track resident information for payroll, identification, benefits and other purposes. For example, for U.S. residents this would be their Social Security Number, for German residents it would be their Social Insurance Number and for UK residents it would be their National Insurance Code.

O

Oracle PeopleSoft - A provider of Enterprise Resource Planning software for large organizations.

Organization Contact - Area of the PeopleSoft production system that is used to enter information for multiple contacts for a specific External Organization. This must be entered after the Organization Location.

Organization Department - Area of the PeopleSoft production system which is used to enter multiple department information for a specific External Organization. This must be entered after the Organization Location.

Organization Location - Area of the PeopleSoft production system that is used to enter information regarding addresses and phone numbers for a specific External Organization. This must be entered prior to Organization Contacts and Organization Departments.

P

Payment Plan - Payment plans enable you to offer students the flexibility of paying their

education expenses over a period of time rather than in one lump sum. Student Financials provides several choices for you to create and process student payment plans. The three types of payment plans are calculated, existing, and lump sum. These types differ from the deferral contract in that the deferral contract only adjusts the due and billing dates. The calculated and existing payment plans defined in this section actually credit the eligible charges.

The calculated payment plan enables you to use item type groups to define eligible charges. Also, the calculated payment plan can use the Offset Charges feature. Adjustments to student charges can affect this payment plan. This payment plan may be available through self-service.

The existing payment plan enables you to manually select individual charges that may be eligible for the payment plan. Adjustments to the student charges can affect this payment plan.

The lump sum payment plan uses the Charge Priority List feature to determine which charges can be paid by the initial lump sum payment. The initial lump sum payment will be posted to the payment plan account type. Adjustments to the student charges will not have an effect on this payment plan. This payment plan may be available through self-service.

PeopleBooks - Reference materials provided by PeopleSoft, accessible through the "Help" link in the upper right corner of most pages.

PeopleSoft - See Oracle PeopleSoft.

Person Record - Data in PeopleSoft that uniquely identifies a person. Includes information that identifies a person, such as name, birth date, gender, citizenship, ethnicity, address and telephone number. Each person has only one person record in PeopleSoft.

Plan - See Academic Plan.

Pop Selection – Population Selection allows the user to use different tools, such as query, equation engine or a flat file as a selection tool to identify IDs for a process.   Examples of processes are: Service Indicators, Student Groups, Assignment to Payment Plans, Posting of Transactions, etc.

Portal - A web page that serves as an entry, or portal, that allows a user access to multiple databases with only one sign-on.

Post Value - The status of a record in the Suspense File that has been considered for entry in the database. The possible values are Complete, Error, and Perform. If a record examined during the Search/Match/Post process contained no errors (missing or invalid values) and was not a duplicate — or possible duplicate — of an existing record, it would be added to the database and its Post Value would be Complete. If the Search/Match/Post process found errors or possible duplicates, the Post Value would be Error.

Posting - The process by which accounting entries are created or updated. The entry does not become "official" until it is posted. Vouchers and journal entries are examples of items that are posted.

Program - See Academic Program.

Program Action - A change to an applicant's program data indicating the applicant's status in the application process (e.g., Application or Admit). Used in conjunction with an Action Reason.

Program/Plan Stack - A combination of a student's academic program and academic plan. Just like a student needs to be in a program with a major , a student will need to have an available program/plan stack to be eligible to enroll in a term.

Prospect - An individual that has expressed interest in attending UC.

Purge Process - A set of steps the system executes to remove values from tables in the database.

Q

Query - A limited-access reporting tool that allows a user to create simple, ad hoc reports.

Query Limits - In student reporting dashboards, restrictions on data to be returned which are applied to a report before processing.

R

Results - In student reporting dashboards, the raw data returned to the user after running a query.

Report - A printable version of results which have been read and returned from a database.

Role - Job function or title that identifies the specific PeopleSoft functions that an individual is able to access by class or type of user.

Run Control ID - The name a user gives to a set of parameters defined to run a process. For example, you might assign the Run Control ID "grescoreload" to the parameters you define to load GRE Scores to the database.

S

Search/Match - Examines all records in the database to identify possible duplicates, but does not post unduplicated records.

Search/Match/Post Process - Examines all records in the database to identify possible duplicates and posts unduplicated records, if you have selected the Post option.

Section Type - See Course/Class Component.

Self-Service - Self-Service applications provide an easy-to-use interface to UC's administrative and academic database systems. Self-Service applications are designed for a wide range of users, such as instructors, advisors, faculty, staff, students, parents and alumni. In this context, if an application is defined as Self-Service, it is intuitive to use, it provides

access to data through a commonly-used interface, such as a web browser, and it does not require the user to install additional software.

Service Indicators - Buttons that display on pages to indicate services that should be withheld or provided to an individual.

Negative Service Indicators indicate holds that prevent the individual from receiving certain services such as no check cashing privileges or denied registration for classes.

Positive Service Indicators designate special services that should be provided to the individual such as front-of-line service or special services for disabled students.

Service Impact - An action triggered by a Service Indicator. For example, a Service Indicator that reflects non-payment of account balances by a student may result in a Service Impact that prohibits registration for classes.

Session (also Term Session) - A time period within a term designed to support the various enrollment periods within a term. Each session has distinct beginning and ending dates to drive selected key processing activities such as early registration, drop/add and grading periods.

Set ID – an identification code that represents a set of control table information or table sets. Set IDs are a fundamental element of PeopleSoft configuration that enables flexibility and control of control data.

Set Letter Code - An identifier for the group of letter codes to which a particular letter code belongs.

Single Sign-on - Refers to the ability of users to navigate freely within a system of multiple applications after only being authenticated once.

Speed Type - A code in the General Ledger module that can group together ChartField combinations and define what Chartfield values are valid in combination with each other.

Standard Letter Code - An identifier for a particular outgoing document or publication.

Student Financials - PeopleSoft's Campus Solutions Student Financials module. Student Financials is a tool for higher education institutions to manage student receivables, billing, collections, and cashiering. Using Student Financials, both staff and students can quickly find and use the financial information they need to make critical decisions. Student Financials receives information from virtually all areas of PeopleSoft Campus Solutions. With this application, you can:

Calculate fees and tuition.

Maintain customer account information.

Create bills.

Establish payment plans.

Refund tuition and fees.

Perform cashiering.

Process collections.

Interact with your general ledger system.

Set up and print tax forms.

Student Groups - Track student membership in various groups for reporting, fee calculation or degree progress assessment. Catalyst allows administrators to track groups within an academic institution, so students of any program or career can be associated with the same group.

Student Post – page used to post transactions for individual students.

Student Records - PeopleSoft's Campus Solutions Registration and Records module.

Student Reporting Dashboard - A web-based application for querying databases using pre-defined reports. It is part of the Hyperion Brio Performance Suite family of software.

Sub-ledger - A system which feeds financial information into the general ledger.

Subcode - See Item Type.

Subject - The area of study in which courses are offered by Academic Organizations. Sometimes it is the same as the Academic Organization (Department, course entry view) and sometimes it is different. For instance, the Department of Math (Organization) offers Math (Subject) courses, but the Department of Romance Studies (Organization) offers French (Subject) courses.

SME - Subject matter expert.

Sub-Plan - An area of further specialized studies directly within an academic plan. Sub-plans must be tied to Plans. Concentration/Specialization

Suspect - An individual in which UC has an interest.

Suspense File - A temporary table to which test score records are loaded for review and, if necessary, cleanup before being posted to the database.

T

Term - A period of time containing sessions for enrollment, fees for billing, and academic statistics for students and the institution. It is usually equivalent to a semester or quarter. Sessions are time periods within a term. (2147 to represent 2014 Fall Semester)

Term Activation – the process to activate a student for a term (see Activate).

Term Fee – a tuition fee code used to assess tuition and mandatory fees to a student's

account.

Test Component - A portion of a standardized test of academic achievement for which the score achieved will be reported separately, e.g. the Verbal component of the Graduate Record Examination.

Third Party Contract - used to link one or more students to an external organization that has agreed to pay for some or all of the students' fees.

Tracking Group - A combination of one or more related checklists into a single unit for ease of monitoring their progress toward completion.

Tuition Calc – process used to calculate student tuition and fees.

Tuition Group – enables you to assess fees to large groups of students who share attributes.

U

University - See Academic Institution.

Unit - The course credit a student earns for completing a class.

UPK - User Productivity Kit. This is an Oracle tool used to produce documentation and training materials.

V

Valid Chartstring - A chartstring whose parts have been determined to create a valid combination.

Variable Data - The information that links a specific communication to a person in the database using key data from the person's record.

W

Waiver – provide a programmatic way of reducing tuition or fees for students who meet specific criteria.

X

Y

Z

Send email when Published:
Yes

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