



Campus Solutions
Student Admissions

Application Staging Management

Business Process Guide

December 2015

Overview & Process Summary

This business process guide (BPG) is intended to be used for managing applications loaded to Campus Solutions (CS) through file parser. Data is loaded to staging records in the Constituent Transaction Management (CTM) component, and a delivered search/match/post process will create and/or add new people and applications to core admissions records.

Business Process Requirements

The user must be able to access the components in this BPG. The user must also not have national id or date of birth masked. **Note:** Masked data will prevent your ability to save a component in which those data elements appear.

Process Steps, Roles and Responsibilities

PREREQUISITES	PRIMARY RESPONSIBILITY	TIMING
Setup Search/Match	Office of the Registrar	Initial setup changed only when new search/match rules are created/needed.
Configure File Parser	PS Development and Integrations	Initial setup changed only when new values are needed.

Where the Data for This Process Comes From

Application data comes from an UC Berkeley application system, such as Slate, Jazzee, HaasTracker, ApplyUC 2U, OptomCAS, or ACES2. The data is sent to the Integration Hub (via API or file). This data is then standardized in a file that is consumable by file parser.

Where the Data from This Process Goes

Once an application is loaded into staging, and passes search/match data integrity/validation, it is promoted to core admissions records (ADM_APPL_DATA). If the applicant does not exist in CS, a new student ID (EMPLID) will be created.

Prerequisites and Assumptions

PREREQUISITE/ASSUMPTION	DETAIL
Most person records will not need intervention.	Only applications that contain data integrity errors, or is a close match to an existing record may need to be updated in staging prior to being promoted to core records

Key Definitions

TERM/ACRONYM	DEFINITION
EMPLID	In Campus Solutions, the Student ID number is called EMPLID. (Not to be confused with EMPLID in HCM which is your Employee ID number.)
Biodemo	Biographical and demographical data on a person, such as name, date of birth, gender, ethnicity, etc.
CTM	Constituent Transaction Management, the CS component staged admissions data is loaded and processed.
Constituent	Data pertaining to the person, such as names, address, ethnicity.
Application Transaction	Data pertaining to a specific application for admission, such as program, plan, admit term, test scores, and previous education.

Constituent Transaction Management

There are two staging tables that contain application data.

- 1) **Constituent Staging.** This table stores all of the bio/demo related information about an applicant. Here you will make Search/Match decisions about suspended applications.
- 2) **Application Transactions.** This table stores all of the application related data. An example of an update you might make is to search for and correct unknown schools.

When the Search/Match/Post process is run (at least once a day, more often during peak times), all applications (without other errors) that have a low probability of matching a person (a search order of 40 or less) will be automatically posted. Any application that does not match any current person will be automatically created. As long as those applications have no other errors, you will not need to look at those records.

All applications where there is a match to more than one Student ID or whose search/match order indicates a high probability match (above 40) will be put into suspended status for manual review and posting.

When you visit this page, it will usually be to work in a particular status.

The applications in staging are in one of several statuses:

Statuses that Need to be Processed

- 1) **Error:** Applications that have a data error that needs to be reviewed prior to being posted.
- 2) **Suspended:** Applications that need a manual review for Search/Match issues (e.g. possible matches) prior to posting.
- 3) **Loaded:** Applications that may need manual review prior to being posted. (This is not a status you would need to check regularly. You might want to review a record to make sure everything is correct before it posts.)

Statuses that We Use

- 1) **Add New ID:** Used when processing Suspended records and it is determined there is no match.
- 2) **Update ID:** Used when processing Suspended records and there is a match.

Statuses the Automated Process Uses

- 1) **Error:** Used when there are errors other than missing institutions or search/match issues.
- 2) **ID Updated:** When the automated process finds a match and posts the application.
- 3) **Ignore:** Do not use. (This would keep the record from posting.)
- 4) **New ID Created:** When the automated process does not find a match and posts the application.
- 5) **Cancelled:** Used to stop an application from loading (e.g. if there is a duplicate application)

Processing Suspended Records

Constituent Staging

Student Admissions>Application Transaction Mgmt>Constituent Staging

Constituent Staging

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Temporary ID: =

Transaction: begins with

Created Date: =

Constituent Status: =

Last Name: begins with

First Name: begins with

Empl ID: begins with

User ID: begins with

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

- Step 1** Select **Suspended** from *Constituent Status* dropdown.
- Step 2** Click the **Search** button.
- Step 3** The search result grid will be displayed below the Search button, if a match was found.
- Step 4** Click on any of the links for a person from the search results.
- Step 5** The Constituent Staging page will be displayed.

Summary Information

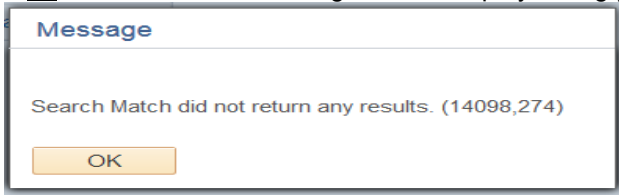
The screenshot shows a web interface with several tabs: Summary Information, Constituent Details, Participation Details, Additional Personal Info, and Regional. The Summary Information tab is active. It contains fields for Temporary ID, User ID, Created Datetime, Created By, Name, Constituent Status (set to 'Suspended'), and ID. A 'Run Search/Match/Post' button is located below the ID field. Below this is a 'Related Transactions' section with a table and navigation options. The table has columns for Status, Transaction Code, Transaction Name, Status Date, Online, and Search/Match Results. One row is visible with Status 'Submitted', Transaction Code 'UC_A_APPL', Transaction Name 'Admissions Application', Status Date '12/07/2015', and Online status 'No'. The 'Search/Match Results' link in the last column is highlighted with a red box. At the bottom of the page are buttons for Save, Return to Search, Previous in List, Next in List, Notify, and Refresh.

Status	Transaction Code	Transaction Name	Status Date	Online	Search/Match Results
Submitted	UC_A_APPL	Admissions Application	12/07/2015	<input type="checkbox"/>	Search/Match Results

Step 6 Click the **Search/Match Results** link.

TIP: Ensure Pop-up blocker has been disabled for this page. Otherwise you may encounter problems.

Note: If no match is found, a dialog box will display letting you know there are no results.



Step 7 If there is a close match (but not exact), a new window or tab (depending on your browser setup) will be displayed with the Search/Match results.

INTEGRATED SEARCH RESULTS

Integrated Search Results

Search Type: Person Ad Hoc Search

Search Parameter: UC_AD_APPLOAD RS Applicant - Basic Search

Result Code: UC_RESULTS Search/Match Results

Match Criteria

Search Results Summary

Number of ID's Found: 2

Search Order Number: 180 Name Only

Search Results Personalize | Find | View All | First 1-4 of 4 Last

Results	Results2	Additional Information	Empl ID	Last Name	First Name	Middle Name	Date of Birth	National ID
Carry ID	Detail		225				07	
Carry ID	Detail		225				07	
Carry ID	Detail		247				08/	
Carry ID	Detail		247				08	

Step 8 Using the data on the Search Results (or **Detail** link), toggle between the two tabs/windows to compare BioDemo values to those on the Constituent Staging page.

Note: If it is not a match, skip to Step 15.

Step 9 If it is a match, then click **Carry ID** button.

Note: If a mistake is made and you have not saved yet, you can go back in & click on another Carry ID or if there should be no match - change the Constituent status to "Create New ID".)

Step 10 Close the Integrated Search Results window/tab (the 2nd tab/window).

Step 11 You should now be back on the original page you started on, Constituent Staging.

Summary Information | Constituent Details | Participation Details | Additional Personal Info | Regional

Temporary ID: [Redacted] Name: [Redacted]

User ID: [Redacted] Constituent Status: Update ID

Created Datetime: 12/07/2015 5:21PM ID: 225

Created By: [Redacted] **Run Search/Match/Post**

Related Transactions Personalize | Find | View All | First 1 of 1 Last

Status	Transaction Code	Transaction Name	Status Date	Online	Search/Match Results
Submitted	UC_A_APPL	Admissions Application	12/07/2015	<input type="checkbox"/>	Search/Match Results

Step 12 Select **Update ID** from the *Constituent Status* dropdown. Notice that the *ID* field will be populated with the Carry ID from Step 9

Step 13 Click the **Save** button.

Step 14 Normal processing will resume to search/match/post the application.

If your analysis determines this is NOT a match, follow these steps instead.

The screenshot shows a web application interface with several tabs: Summary Information, Constituent Details, Participation Details, Additional Personal Info, and Regional. The 'Summary Information' tab is active. It contains fields for Temporary ID, User ID, Created Datetime (12/07/2015 5:21PM), Created By, Name, and Constituent Status (set to 'Add New ID'). There is an 'ID:' field and a 'Run Search/Match/Post' button. Below this is a 'Related Transactions' section with a table and navigation buttons.

Status	Transaction Code	Transaction Name	Status Date	Online	Search/Match Results
Submitted	UC_A_APPL	Admissions Application	12/07/2015	<input type="checkbox"/>	Search/Match Results

Navigation buttons at the bottom include: Save, Return to Search, Previous in List, Next in List, Notify, and Refresh.

- Step 15** Close the second tab/window Integrated Search Results.
- Step 16** The original page you were on, Constituent Staging page is displayed.
- Step 17** Select **Add New ID** from the *Constituent Status* dropdown.
- Step 18** Click the **Save** button.
- Step 19** Normal processing will resume to search/match/post the application.

Processing Error Records

Applications are set to error status when there is an issue with a specific data element (e.g. invalid email address, missing required data, or invalid code), or if the external organization ID needs to be reconciled. The error messages can appear on the Constituent Stating or Application Transaction component.

The following will show an example of an Application Transaction- Reconciliation error.

Application Transactions

Student Admissions>Application Transaction Mgmt>Application Transactions

Application Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Temp Constituent ID:	=	<input type="text"/>	<input type="button" value="Q"/>
Academic Institution:	begins with	<input type="text"/>	<input type="button" value="Q"/>
Academic Career:	=	<input type="text"/>	<input type="button" value="Q"/>
Application Nbr:	begins with	<input type="text"/>	
Last Name:	begins with	<input type="text"/>	
First Name:	begins with	<input type="text"/>	
Application Status:	=	<input type="text"/>	<input type="button" value="Q"/>
Application Status Date:	=	<input type="text"/>	<input type="button" value="Q"/>
Application Fee Status:	=	<input type="text"/>	<input type="button" value="Q"/>
Constituent Status:	=	Error	<input type="button" value="Q"/>

- Step 1** Select **Error** from *Constituent Status* dropdown.
- Step 2** Click **Search** button.
- Step 3** If a match was found, the results will display below the search button.
- Step 4** Click on any of the links for a person from the search results.
- Step 5** The Application Data page will be displayed.

Application Data | Education History | Additional Academic Info | Supplemental Information

Temporary ID: [Redacted] Name: [Redacted]
 User ID: [Redacted] Constituent Status: Error
 Created Datetime: 12/02/2015 2:20PM ID: [Redacted]
 Created By: [Redacted] Run Search/Match/Post
 Constituent Staging

*Institution: UC Berkeley Academic Career: Graduate
 Application Nbr: 0000[Redacted] Application Status Date: 12/08/2015
 Application Status: Submitted Expand All Collapse All

Application Errors Personalize | Find | View All | [Grid Icon] First 1 of 1 Last

Message Sequence	Message Set Number	Message Number	Error Description	Message Severity	Process Instance
1	1	14098	151 Reconcile error: Select a value for EXT_ORG_ID	Reconcile Error	11444

Program Data Find | View All First 1 of 1 Last

Step 6 Identify the error under *Application Errors* section. For example, in this case, we are being asked to enter an External Org ID.

Note: This example is a Reconcile Error. Other errors, such as invalid data elements may occur.

Step 7 Click the **Education History** tab. For other errors you may need to check other pages.

Application Data | **Education History** | Additional Academic Info | Supplemental Information

Temporary ID: [Redacted] Name: [Redacted]
 User ID: [Redacted] Constituent Status: Error
 Created Datetime: 12/02/2015 2:20PM ID: [Redacted]
 Created By: [Redacted] Run Search/Match/Post
 Constituent Staging

*Institution: UC Berkeley Academic Career: Graduate
 Application Nbr: 0000[Redacted] Application Status Date: 12/08/2015
 Application Status: Submitted Expand All Collapse All

School Information Find | View All First 1 of 1 Last

Sequence Number: [1] External Org ID: [Magnifying Glass Icon]

School Name: San Francisco State University
 School Country: USA
 School Address: [Redacted]
 School City: San Francisco
 School State: CA School Postal: [Redacted]
 School CEEB Code: [Redacted] School ACT Code: [Redacted]
 Home School Last School

Last Updated On: 12/08/2015 9:49:29AM Last Updated By: 1085708

Career Data

Step 8 Click the *External Organization ID* lookup prompt (aka the magnifying glass icon).

Step 9 A lookup dialog box will be displayed. Enter in Search Criteria.
WARNING: When using *Search Name* field, do not use spaces (e.g. SANFRANCISCOSTATE)
TIP: Use a wild card (%), and additional search criteria to refine the search (e.g. City and State)

Look Up External Org ID
Help

External Org ID:

Description:

Search Name: %SANFRANCISCOSTATE

Organization Type:

City:

State: CA

Country:

Look Up
Clear
Cancel
Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

External Org ID	Description	Search Name	Organization Type	City	State	Country
3030994643	San Francisco State University	SANFRANCISCOSTATEUNIVERSITY	SCHL	SAN FRANCISCO	CA	USA
3031645618	San Francisco State Univ Exten	SANFRANCISCOSTATEUNIVEXTEN	SCHL	SAN FRANCISCO	CA	USA
3031647295	San Francisco State Univ Summe	SANFRANCISCOSTATEUNIVSUMME	SCHL	SAN FRANCISCO	CA	USA

Step 10 Click on any of the links for an external organization from the search results.

Step 11 The Education History page displays with the selected school in the *External Org ID* field.

School Information
Find | View All
First 1 of 1 Last

Sequence Number:

External Org ID: San Francisco State University

School Name:

School Country:

School Address:

School City:

School State: School Postal:

School CEEB Code: School ACT Code:

Home School Last School

Last Updated On: 12/08/2015 9:49:29AM Last Updated By: 1085708

[Career Data](#)

Step 12 Click the **Save** button.

Step 13 The *Constituent Status* is updated to **Loaded**.

Step 14 Normal processing will resume to search/match/post the application.

Support

For questions or assistance, please contact Campus Shared Services IT.

Call 510-664-9000 (press option 1, then option 2 to reach SIS support)

Email: itcsshelp@berkeley.edu

Submit a ticket: https://shared-services-help.berkeley.edu/new_ticket/it