

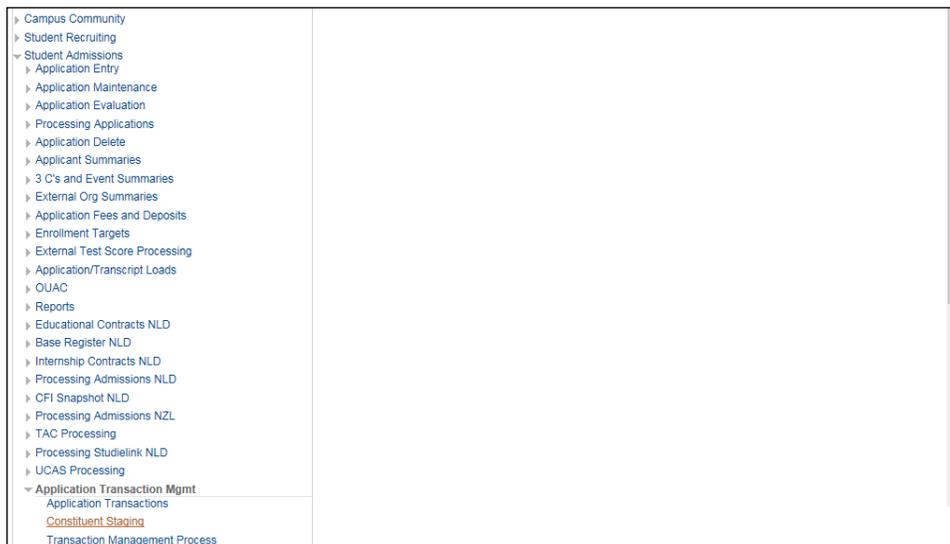
Application Transaction Management

Constituent Staging

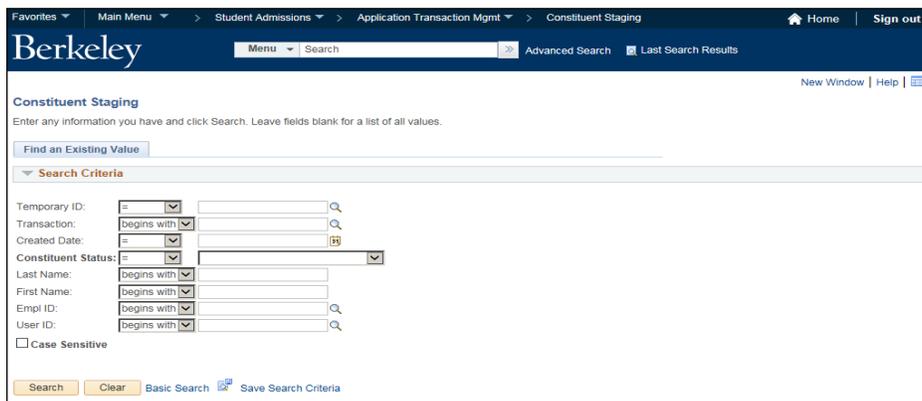
In this topic we will examine applications coming from various campus systems (Jazzee, Slate, etc.) that are being held in staging and need to be reviewed. We will review Constituent information, Application information and resolve an error.

Step	Action
1.	From the Main Menu, click the Student Admissions link. ▶ Student Admissions Note: Your menu choices will differ based on your access.

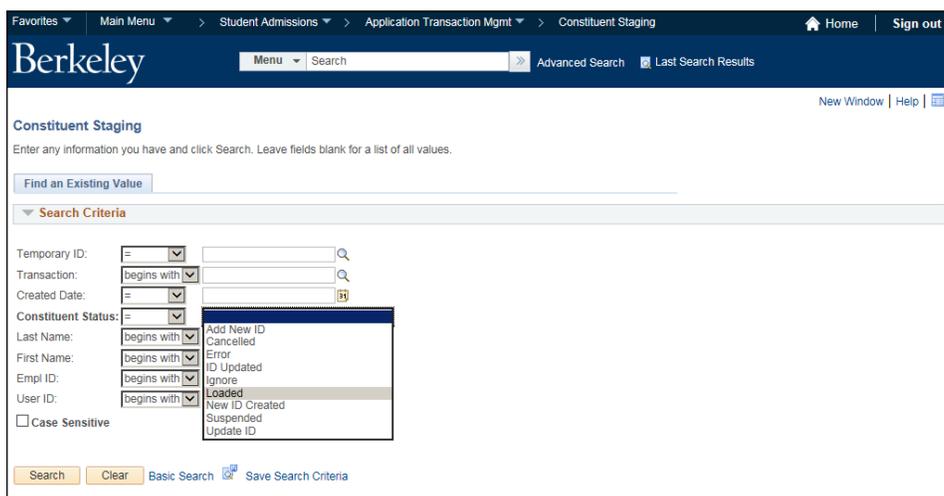
2.	Click the Constituent Staging link. Constituent Staging
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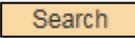
Step	Action
3.	Click the Constituent Staging link. Constituent Staging



Step	Action
4.	<p>You can use different search criteria (e.g. date, status or name/ID). For example, you may wish to see which files are in Error status, or you may want to search to see who was added today.</p> <p>In this example, we will search by Status.</p> <p>Click the Constituent Status drop-list.</p> <p>Constituent Status: = <input type="text"/> <input type="text"/></p>

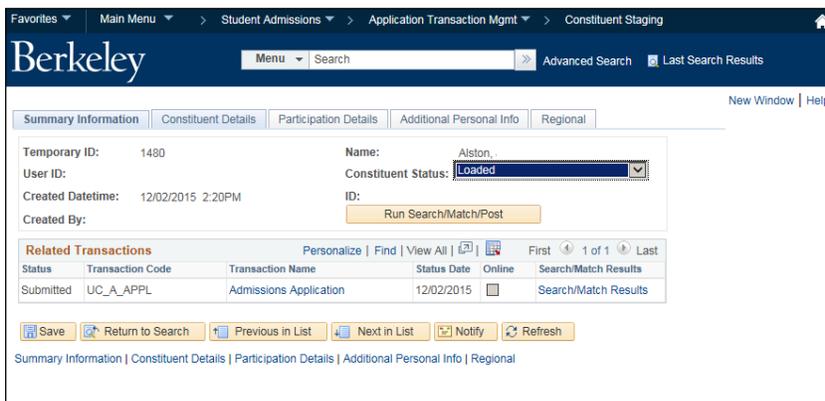


Step	Action
5.	<p>Select the status you would like to view. For example, select the Loaded item.</p> <p>Loaded</p>

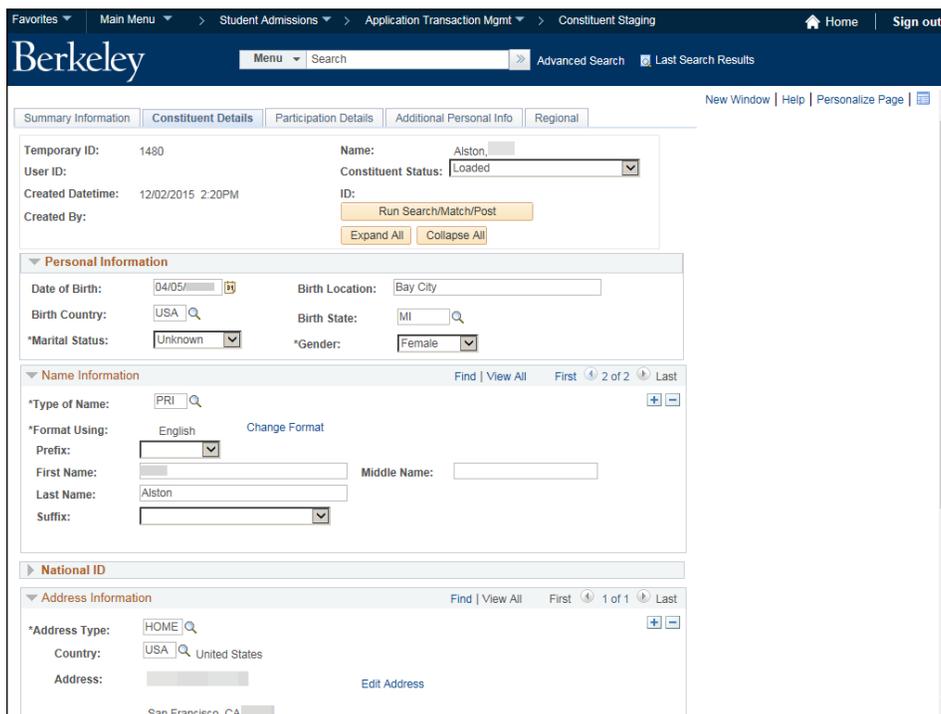
Step	Action
6.	Click the Search button. 

Temporary ID	Transaction	Created Date	Constituent Status	Last Name	First Name	Empl ID	User ID
1467	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1468	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1469	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1470	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1471	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1472	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1473	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1474	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1475	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1476	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1477	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1478	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1479	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)
1480	UC_A_APPL	12/02/2015	Loaded	ALSTON		(blank)	(blank)
1481	UC_A_APPL	12/02/2015	Loaded			(blank)	(blank)

Step	Action
7.	The results displayed will be determined by your security access. In this example, we want to examine the constituent data for an applicant named Alston. You can click anywhere on that display row to get into the record.
8.	On the Summary Information tab, we can see basic high level information, such as when the application loaded.



Step	Action
9.	Click the Constituent Details tab to go to the next page. 



Step	Action
10.	The Constituent Details page contains Bio/Demo data, such as Name, Address, Phone and Email information. This can be edited as needed.

The screenshot shows the Berkeley Constituent Staging interface. The breadcrumb trail is: Favorites > Main Menu > Student Admissions > Application Transaction Mgmt > Constituent Staging. The page title is "Berkeley" and the user is logged in as "Home | Sign out". The main content area displays the following sections:

- Name Information:** *Type of Name: PRI, *Format Using: English, Prefix: [dropdown], First Name: [text], Middle Name: [text], Last Name: Alston, Suffix: [dropdown].
- National ID:** Address Information: *Address Type: HOME, Country: USA United States, Address: San Francisco, CA.
- Phone Detail:** Table with columns: Phone Type, Telephone, Phone Extension, Country Code, Preferred. One row is visible with Phone Type: HOME.
- Email Information:** Table with columns: *Email Type, *Email Address, Preferred. One row is visible with *Email Type: OTHR.
- Notification Preferences:** [Save] [Return to Search] [Previous in List] [Next in List] [Notify] [Refresh]

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

Step	Action
11.	Click the Participation Details tab. Participation Details

The screenshot shows the Berkeley Constituent Staging interface with the "Participation Details" tab selected. The breadcrumb trail is: Favorites > Main Menu > Student Admissions > Application Transaction Mgmt > Constituent Staging. The page title is "Berkeley" and the user is logged in as "Home | Sign out". The main content area displays the following sections:

- Summary Information:** Temporary ID: 1480, User ID: [text], Created Datetime: 12/02/2015 2:20PM, Created By: [text].
- Name Information:** Name: Alston, Constituent Status: Loaded, ID: [text]. Buttons: Run Search/Match/Post, Expand All, Collapse All.
- Work Experience:** Employer: David Grant, *Sequence Number: 6, Retired: [checkbox].
- Work Experience Address:** Radio buttons: None, Location. Country: United States, City: Travis, State: CA California, Phone Type: [dropdown], Phone: [text].
- Industry Code (SIC):** [text], Relevant Work Experience: [checkbox].
- Start Date:** 09/15/2014, End Date: [text], Retirement Date: [text].
- Title Long:** General Surgeon, Occupation Code (SOC): [text].
- Employment Fraction:** [text], Hours Per Week: 50.00, Ending Pay Rate: [text], *Pay Frequency: Annual.
- Comments:** [text area]

New Window | Help | Personalize Page

Step	Action
12.	This page can be used to maintain Work Experience. This will be used primary by HAAS Business School.

The screenshot displays the Berkeley Work Experience form. The form is titled 'Work Experience' and includes the following fields and sections:

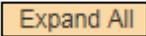
- Employer:** David Grant Medical Center, Travis Air Force Base
- *Sequence Number:** 6
- Retired:**
- Work Experience Address:**
 - None
 - Location
 - Country:** United States
 - City:** Travis AFB
 - State:** CA
 - Phone Type:** [Dropdown]
 - Phone:** [Text]
- Industry Code (SIC):** [Text]
- Start Date:** 09/15/2014
- End Date:** [Text]
- Retirement Date:** [Text]
- Title Long:** General Surgeon
- Occupation Code (SOC):** [Text]
- Employment Fraction:** [Text]
- Hours Per Week:** 50.00
- Ending Pay Rate:** \$140,000.000
- *Pay Frequency:** Annual
- Comments:** [Text Area]
- Last Updated On:** 12/02/2015 2:20:02PM
- Last Updated By:** 1085708
- File Attachments:** [Section with 'View' and 'Add Attachment' buttons]

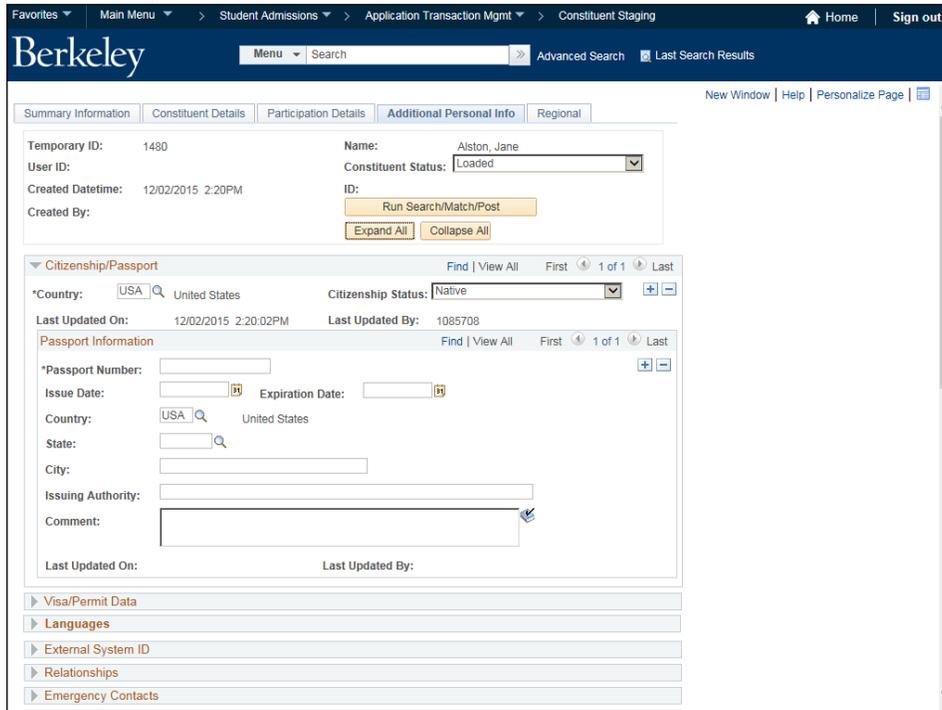
Step	Action
13.	To see the history on an effective dated row, you can click the arrow key  to move back through the previous Work Experience.

Step	Action
14.	Click the Additional Personal Info tab. Additional Personal Info

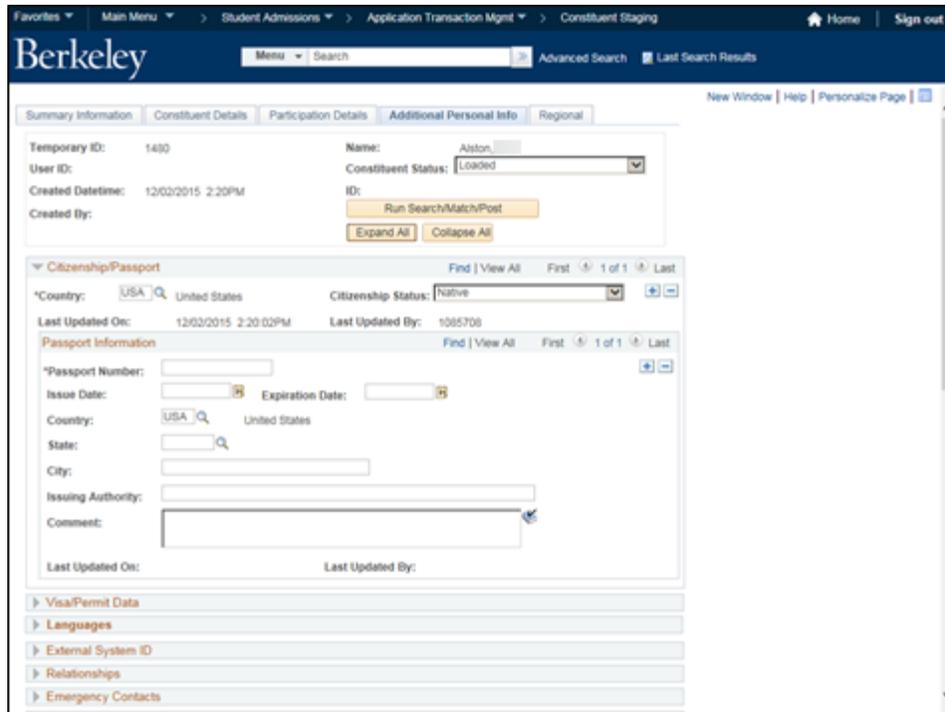
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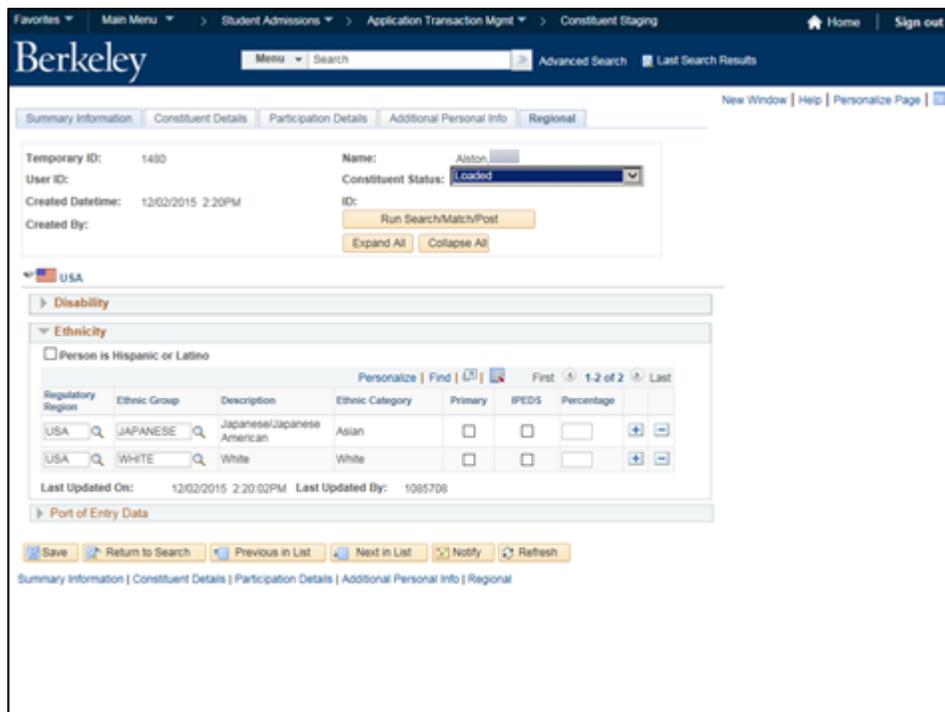
Step	Action
15.	If you want to open up all the sections on this page at one time, click the Expand All button.  . (To close the sections on this page, click the Collapse All button.)



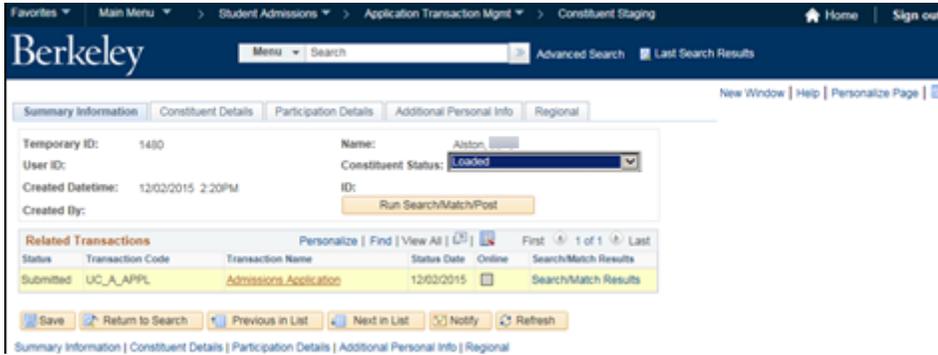
Step	Action
16.	Scroll back to the top of the page and click the Regional tab. 



Step	Action
17.	The Regional page contains Ethnicity information.

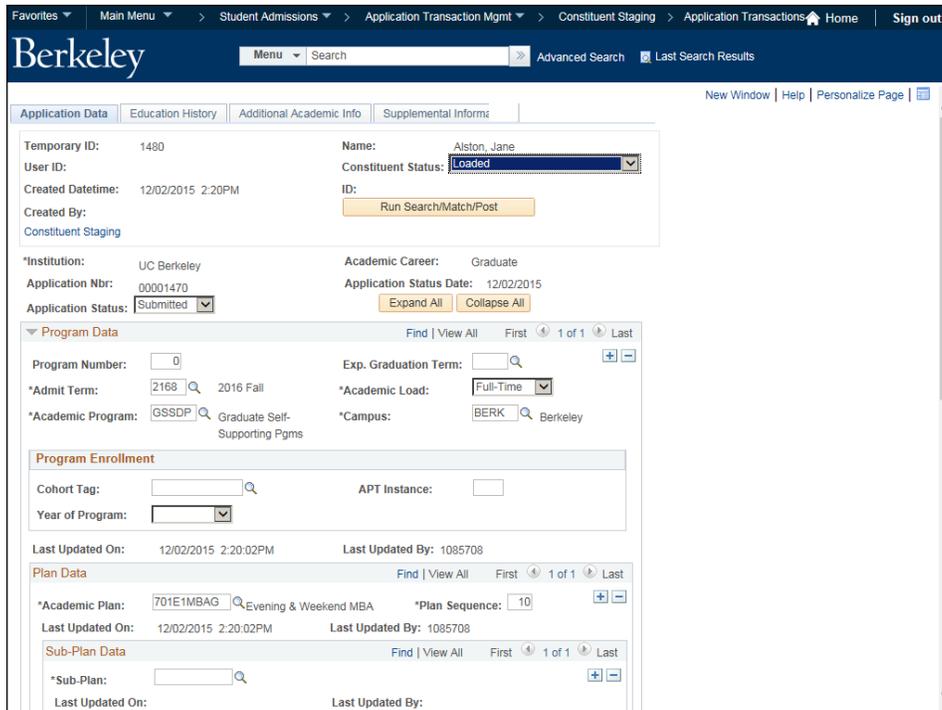


Step	Action
18.	We have finished reviewing the Constituent information about the applicant. Click the Summary Information tab  to return to the first tab page.



Applications Transactions

Step	Action
19.	Now we are ready to view the application for this person. Click the Admissions Application link. NOTE: You could also have gone directly to this page by going to Student Admissions>Application Transaction Management>Application Transactions



Step	Action
20.	All of the application information will display on this page. Scroll down to view the entire page.

The screenshot shows the Berkeley application form interface. At the top, there is a navigation bar with 'Berkeley' logo, a search bar, and links for 'Menu', 'Advanced Search', and 'Last Search Results'. Below the navigation bar, the 'Application Data' section is expanded, showing various input fields and dropdown menus. Fields include 'Application Center' (HAAS), '*Admit Type' (FYR), 'Academic Level', 'Housing Interest', '*Notification Plan' (Regular), 'Application Method', '*Application Fee Status' (Received), 'Application Fee Date' (12/01/2015), 'Application Fee Type' (Standard), 'Application Fee Amount', 'Application Fee Paid', and 'Waive Amount'. There are also checkboxes for 'Prior Application', 'Financial Aid Interest', 'Previous Attendance', 'Graduated early?', 'Electronic Signature', 'Not Currently Attending School', and 'Criminal Conviction'. At the bottom of the form, there are buttons for 'Save', 'Return to Search', and 'Notify', along with a breadcrumb trail: 'Application Data | Education History | Additional Academic Info | Supplemental Information'.

Step	Action
21.	Click the Education History link at the bottom of the page or click the Education History tab at the top of the page. Education History This page will show us previous schools and prior degrees.

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The screenshot shows the Berkeley application management interface. At the top, there is a navigation bar with 'Berkeley' logo and a search bar. Below the navigation bar, there are several sections: 'User ID' with 'Constituent Status: Loaded' and a 'Run Search/Match/Post' button; 'Created Datetime: 12/02/2015 2:20PM' and 'Created By: Constituent Staging'; '*Institution: UC Berkeley' and 'Academic Career: Graduate'; 'Application Nbr: 00001470' and 'Application Status Date: 12/02/2015'; and 'Application Status: Submitted' with 'Expand All' and 'Collapse All' buttons.

The 'School Information' section includes fields for 'Sequence Number: 1', 'External Org ID', 'School Name: College of William and Mary', 'School Country: USA', 'School Address', 'School City: Williamsburg', 'School State: VA', 'School Postal', 'School CEEB Code', and 'School ACT Code'. There are also checkboxes for 'Home School' and 'Last School', and a 'Last Updated On: 12/02/2015 2:20:02PM' and 'Last Updated By: 1085708'.

The 'External Courses' section is expanded to show 'External Degrees'. It has tabs for 'Degree', 'Field of Study', 'Transcript', 'Audit', and 'Audit'. Below the tabs is a table with columns: 'Degree Number', 'Degree', 'Description', '*Data Source', '*Degree Status', and '*Honors Category'. The table contains one row with the following data: '1', '1', 'Bachelor's degree or equi', '06/15/2004', 'Self-Rpted', 'Progress', and 'None'. There is a 'Show all columns' button above the table.

At the bottom of the form, there are buttons for 'Save', 'Return to Search', and 'Notify'.

Step	Action
22.	To see more information in the External Degrees section you can either click on each tab page or click the Show all columns button.  Then scroll to the right to see all the information.

User ID: Constituent Status:
 Created Datetime: 12/02/2015 2:20PM ID:
 Created By:
 Constituent Staging

*Institution: UC Berkeley Academic Career: Graduate
 Application Nbr: 00001470 Application Status Date: 12/02/2015
 Application Status:

School Information

Sequence Number:
 External Org ID:
 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: 12/02/2015 2:20:02PM Last Updated By: 1085708

*Degree Number	Degree	*Description	*Degree Date	*Data Source	*Degree Status	*Honors Category	External Subject 1	Field of Study 1	External Subject
1	1	Bachelor's degree or equi	06/15/2004	Self-Rpted	Progress	None		Chemistry	

Step	Action
23.	To revert to the previous view, click the Show tabs button. 

User ID: Constituent Status:
 Created Datetime: 12/02/2015 2:20PM ID:
 Created By:
 Constituent Staging

*Institution: UC Berkeley Academic Career: Graduate
 Application Nbr: 00001470 Application Status Date: 12/02/2015
 Application Status:

School Information

Sequence Number:
 External Org ID:
 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: 12/02/2015 2:20:02PM Last Updated By: 1085708

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

*Degree Number	Degree	*Description	*Degree Date	*Data Source	*Degree Status	*Honors Category	External Subject 1	Field of Study 1	External Subject
1	1	Bachelor's degree or equi	06/15/2004	Self-Rpted	Progress	None		Chemistry	

Step	Action
24.	Click on a tab to see the information. For example, click the Field of Study tab. Field of Study

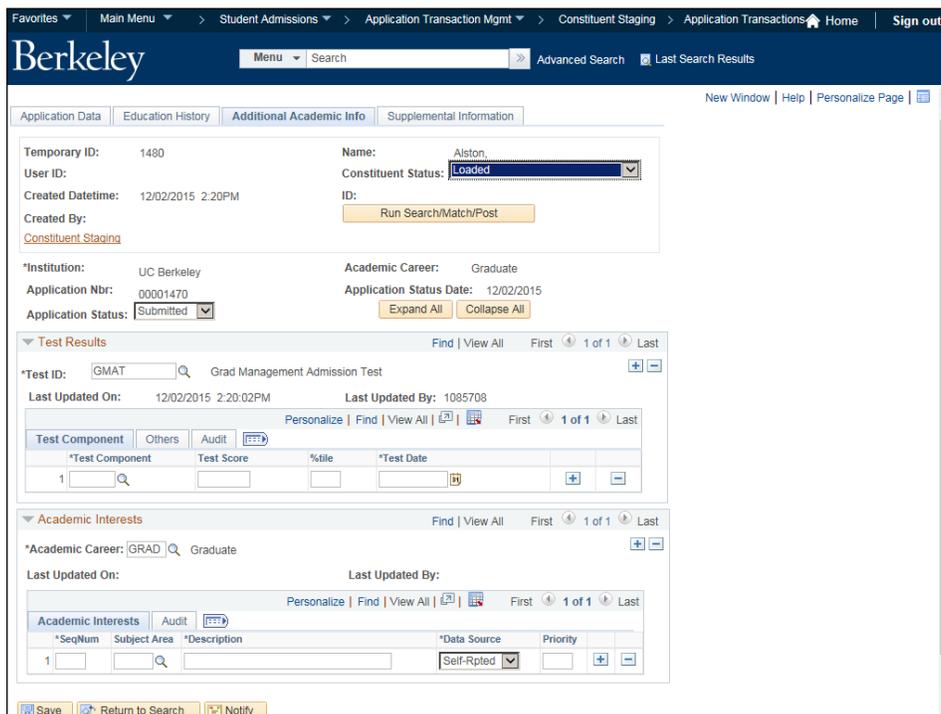
Step	Action
25.	Click the Transcript tab. Transcript

The screenshot shows the Berkeley application interface. At the top, there is a navigation bar with 'Berkeley' logo and search options. Below the navigation bar, there are several sections: 'User ID', 'Created Datetime', 'Created By', 'Constituent Status', 'Institution', 'Application Nbr', 'Application Status', 'Academic Career', and 'Application Status Date'. The 'External Degrees' section is expanded, showing a table with columns for 'Degree Number', 'Degree', 'External Career', and 'Data Number'. The 'Audit' tab is selected, and the table shows one entry with 'Degree Number' 1 and 'Degree' 1. The 'Last Updated On' and 'Last Updated By' fields are visible at the bottom of the table.

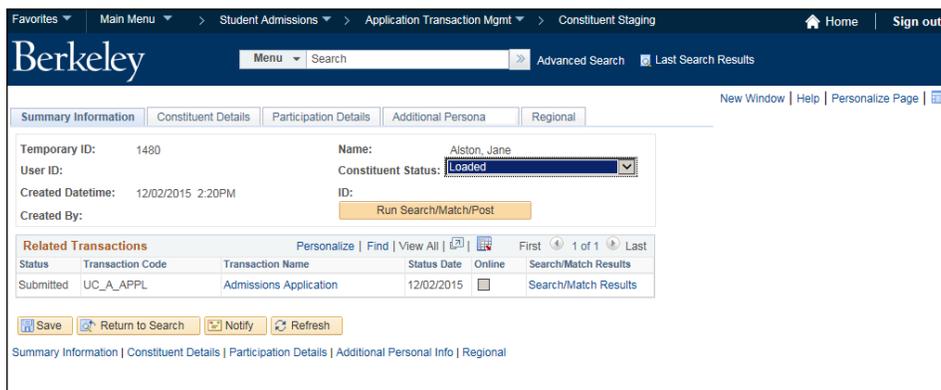
Step	Action
26.	Click the Audit tab.  This keeps track when this page was last updated and by whom.

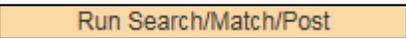
This screenshot is identical to the one above, but the 'Audit' tab is selected, and the table in the 'External Degrees' section now displays the 'Last Updated On' and 'Last Updated By' columns. The table shows one entry with 'Degree Number' 1, 'Degree' 1, 'Last Updated On' 12/02/2015 2:20:02PM, and 'Last Updated By' 1085708.

Step	Action
27.	Click the Additional Academic Info link at the bottom of the page or scroll up and click the  tab. This page will display test scores.



Step	Action
28.	Click the Constituent Staging link in the upper left corner.  This will take us back to the Constituent Staging page we started on.



Step	Action
29.	Click the Run Search/Match/Post button. 

Resolving an Error in Constituent Staging

Step	Action
30.	To view any applications that are in Error status, we will visit the Constituent Staging page again.

Favorites ▾ Main Menu ▾ > Student Admissions ▾ > Application Transaction Mgmt ▾ > Constituent Staging Home Sign out

Berkeley Menu Search Advanced Search Last Search Results

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: [=] [] [Q]

Transaction: [begins with] [] [Q]

Created Date: [=] [] [B]

Constituent Status: [=] [] [Q]

Last Name: [begins with] [] [Q]

First Name: [begins with] [] [Q]

Empl ID: [begins with] [] [Q]

User ID: [begins with] [] [Q]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Step	Action
31.	Click the Constituent Status list.

Constituent Status: [=] [] [Q]

Favorites ▾ Main Menu ▾ > Student Admissions ▾ > Application Transaction Mgmt ▾ > Constituent Staging Home Sign out

Berkeley Menu Search Advanced Search Last Search Results

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: [=] [] [Q]

Transaction: [begins with] [] [Q]

Created Date: [=] [] [B]

Constituent Status: [=] [] [Q]

Last Name: [begins with] [] [Q]

First Name: [begins with] [] [Q]

Empl ID: [begins with] [] [Q]

User ID: [begins with] [] [Q]

Case Sensitive

Search Clear Basic Search Save Search Criteria

- Add New ID
- Cancelled
- Error**
- ID Updated
- Ignore
- Loaded
- New ID Created
- Suspended
- Update ID

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

Temporary ID: 1480 Name: _____
 User ID: _____ Constituent Status: Error
 Created Datetime: 12/02/2015 2:20PM ID: _____
 Created By: _____ Run Search/Match/Post

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	20286
2	2	14200	557 Constituent - BIRTHSTATE (SCC_STG_CONSTIT.BIRTHSTATE) Invalid value - Check and try again	Invalid Error	20286

Related Transactions

Status	Transaction Code	Transaction Name	Status Date	Online	Search/Match Results
Submitted	UC_A_APPL	Admissions Application	12/02/2015	<input type="checkbox"/>	Search/Match Results

Save Return to Search Notify Refresh

Step	Action
36.	Click the Constituent Details tab. Constituent Details

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

Temporary ID: 1480 Name: _____
 User ID: _____ Constituent Status: Error
 Created Datetime: 12/02/2015 2:20PM ID: _____
 Created By: _____ Run Search/Match/Post
 Expand All Collapse All

Personal Information

Date of Birth: _____ Birth Location: Bay City
 Birth Country: Birth State: MI
 *Marital Status: Unknown *Gender: Female

Name Information

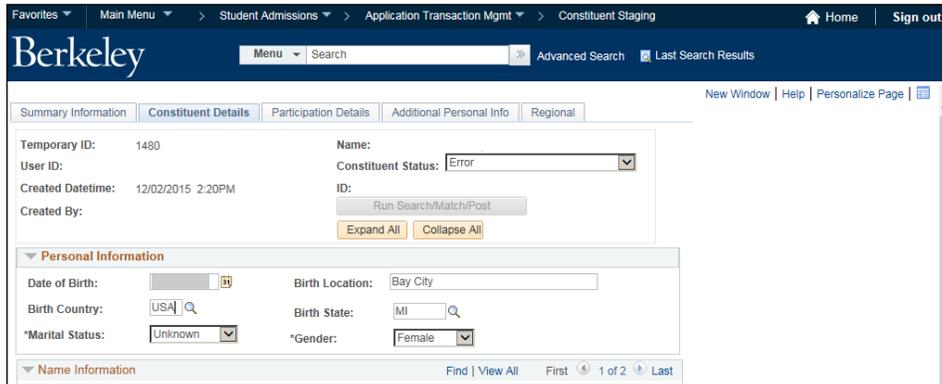
*Type of Name: PRF
 *Format Using: English Change Format
 Prefix: _____
 First Name: _____ Middle Name: _____
 Last Name: _____
 Suffix: _____

National ID

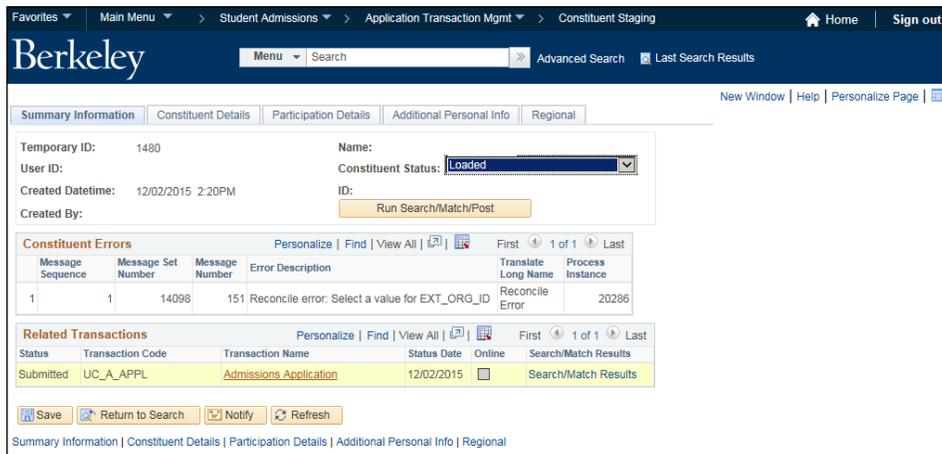
Address Information

*Address Type: HOME
 Country: USA United States

Step	Action
37.	Enter the desired information into the Birth Country field. Enter "USA". Birth Country:



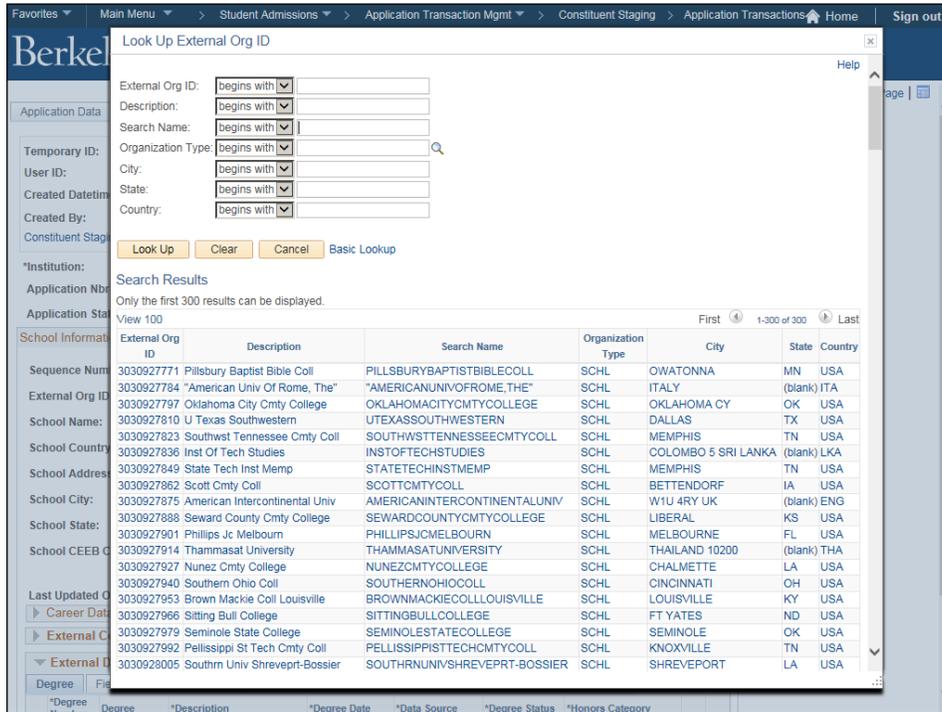
Step	Action
38.	Click the Save button at the bottom of the page.
	We have resolved one of the errors, but we must now resolve the External Org ID issue.



Step	Action
39.	Click the Admissions Application link. Admissions Application This will take us to the Application information pages.

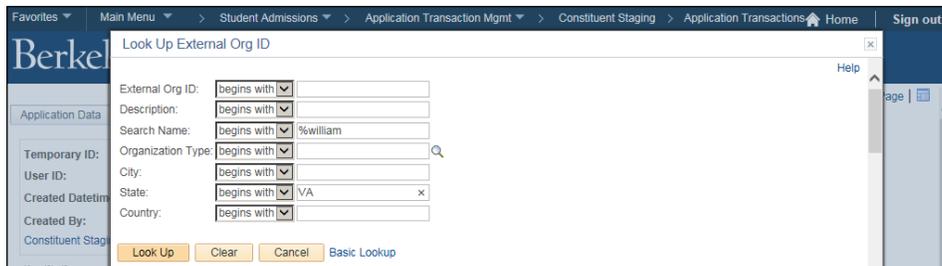
Step	Action
40.	Click the Education History tab. Education History

Step	Action
41.	Click the Look up External Org ID icon. 



Step	Action
42.	Enter the desired information into the Search Name field. If you're not sure of how the name has been entered, you can use WildCard symbol %. In this example, to search for College of William and Mary, we will enter " %william ". <input type="text" value="Search Name: begins with %william"/>

Step	Action
43.	Then to further narrow down our search, we will enter " VA " in the State field <input type="text" value="State: begins with VA"/>



Step	Action
44.	Click the Look Up button. Look Up Any school in <i>Virginia</i> with <i>William</i> in the title will now display.

Look Up External Org ID

External Org ID: begins with

Description: begins with

Search Name: begins with %WILLIAM

Organization Type: begins with

City: begins with

State: begins with VA

Country: begins with

Look Up **Clear** **Cancel** Basic Lookup

Search Results

View 100

External Org ID	Description	Search Name	Organization Type	City	State	Country
3030990106	Coll William And Mary	COLLWILLIAMANDMARY	SCHL	WILLIAMSBURG	VA	USA
3031552577	King William High School	KINGWILLIAMHIGHSCHOOL	SCHL	KING WILLIAM	VA	USA
3031495793	T C Williams High School	TCWILLIAMSHIGHSCHOOL	SCHL	ALEXANDRIA	VA	USA
3031555281	William Byrd High School	WILLIAMBYRDHIGHSCHOOL	SCHL	VINTON	VA	USA
3031557634	William Campbell High School	WILLIAMCAMPBELLHIGHSCHOOL	SCHL	NARUNA	VA	USA
3031548976	William Fleming High School	WILLIAMFLEMINGHIGHSCHOOL	SCHL	ROANOKE	VA	USA
3031551615	William Monroe High School	WILLIAMMONROEHIGHSCHOOL	SCHL	STANARDSVILLE	VA	USA
3031557894	Williamsburg Christian Academy	WILLIAMSBURGCHRISTIANACADEMY	SCHL	WILLIAMSBURG	VA	USA

Step	Action
45.	Click the Coll William And Mary link. Coll William And Mary

46.	The associated External Org ID will fill into the appropriate field.
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Created By: **Run Search/Match/Post**

Constituent Staging

*Institution: UC Berkeley Academic Career: Graduate

Application Nbr: 00001470 Application Status Date: 12/02/2015

Application Status: Submitted **Expand All** **Collapse All**

School Information Find | View All First 1 of 1 Last

Sequence Number: 1

External Org ID: 3030990106 **Coll William And Mary**

School Name: College of William and Mary

School Country: USA

School Address:

School City: Williamsburg

School State: VA School Postal:

School CEEB Code: School ACT Code:

Home School Last School

Last Updated On: 12/02/2015 2:20:02PM Last Updated By: 1085708

Career Data

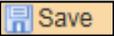
External Courses

External Degrees Personalize | Find | View All | 1 of 1 Last

*Degree Number	Degree	*Description	*Degree Date	*Data Source	*Degree Status	*Honors Category
1	1	Bachelor's degree or equi	06/15/2004	Self-Rptd	Progress	None

Save **Return to Search** **Notify**

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

Step	Action
47.	Click the Save button. 

Step	Action
48.	Scroll to the top of the page and click the Application Data tab. 

The screenshot shows the Berkeley application management interface. The breadcrumb trail is: Favorites > Main Menu > Student Admissions > Application Transaction Mgmt > Constituent Staging > Application Transactions. The page title is 'Berkeley' and it includes a search bar and navigation links like 'Home' and 'Sign out'. The main content area has tabs for 'Application Data', 'Education History', 'Additional Academic Info', and 'Supplemental Information'. The 'Application Data' tab is active, displaying fields for Temporary ID (1480), User ID, Created Datetime (12/02/2015 2:20PM), and Created By. A 'Constituent Staging' link is highlighted in orange. Below this, there are fields for Institution (UC Berkeley), Application Nbr (00001470), Application Status (Submitted), Academic Career (Graduate), and Application Status Date (12/02/2015). There are also 'Expand All' and 'Collapse All' buttons. The 'Program Data' section includes Program Number (0), Admit Term (2168), Academic Program (GSSDP), Exp. Graduation Term, Academic Load (Full-Time), and Campus (BERK). The 'Program Enrollment' section has Cohort Tag and APT Instance fields. The 'Plan Data' section shows Academic Plan (701E1MBAG) and Plan Sequence (10). The 'Sub-Plan Data' section has a Sub-Plan field.

Step	Action
49.	Click the Constituent Staging link. Constituent Staging

This is a duplicate of the screenshot above, showing the same Berkeley application management interface with the 'Constituent Staging' link highlighted.

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Step	Action
50.	The errors are resolved and the application is now Loaded.