CY2

Fluid Self Service

Admissions

&

Registration

Presenter:

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10-10-2018

Session 4536

Presenter

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Current focus areas:

- Admissions/Registration

- Student Records

- Research Tracking

CY2

CY2 is a global reference partner of educational institutions for training and guidance. We aim for state of the art solutions related to student information services.

What you will see...

1
INTRODUCTION
What is it and why do we need it?

2
Short Demo
To see the point...

3
Setup
Prereqs and steps

4
Demo
Explore Fluid Admissions

5
Registration
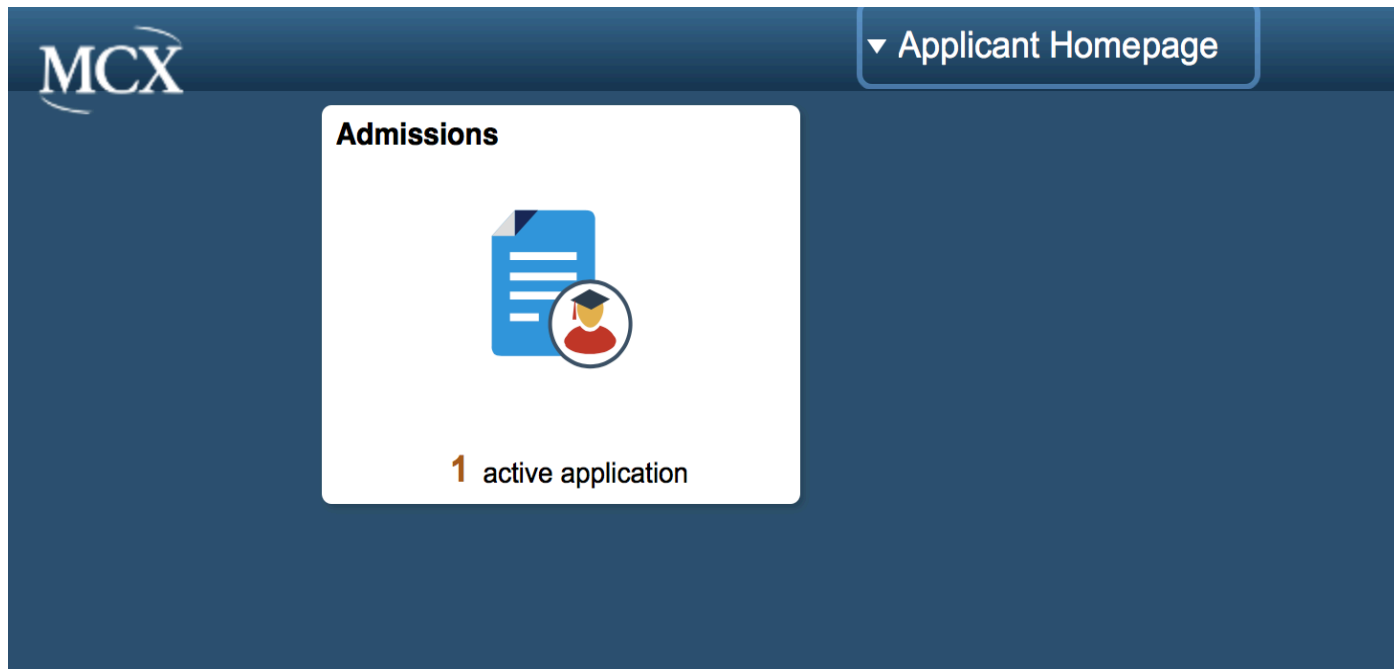Discover registration Activity Guide
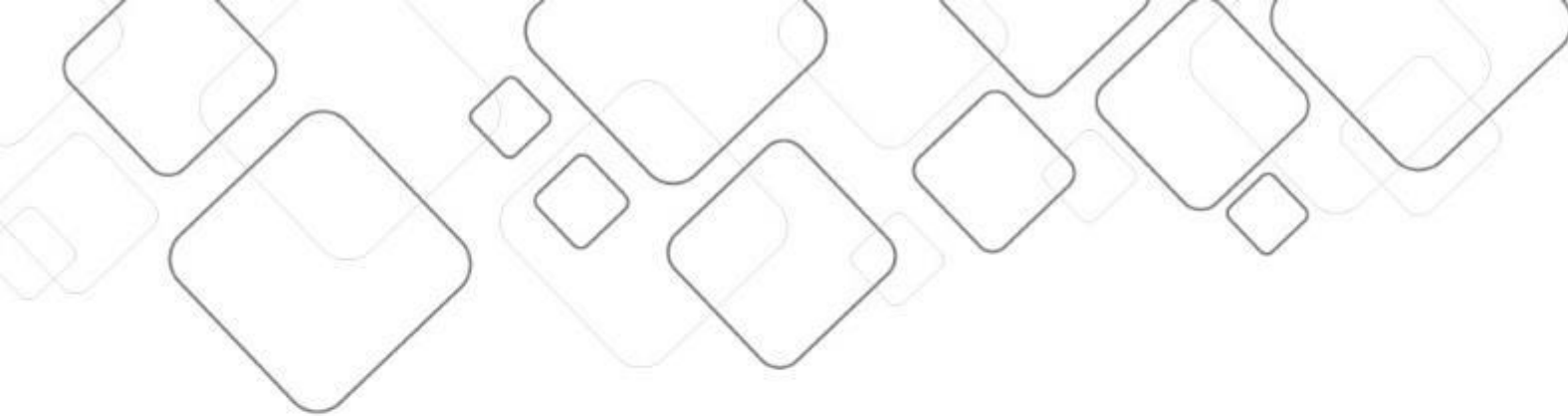
6
Tips & Tricks
Useful insights

What is it?

- Delivered FLUID Admissions Self Service Functionality

- Ready to go, no technical support needed

Why do we need it?

- No need to build it yourself…

- Configurable using multiple parameters

- Inform the student/Student in charge!

- Upload Functionality

- Coherent look-and-feel during student life cycle
  - Payments/Financials
  - Campus Community
  - Registration
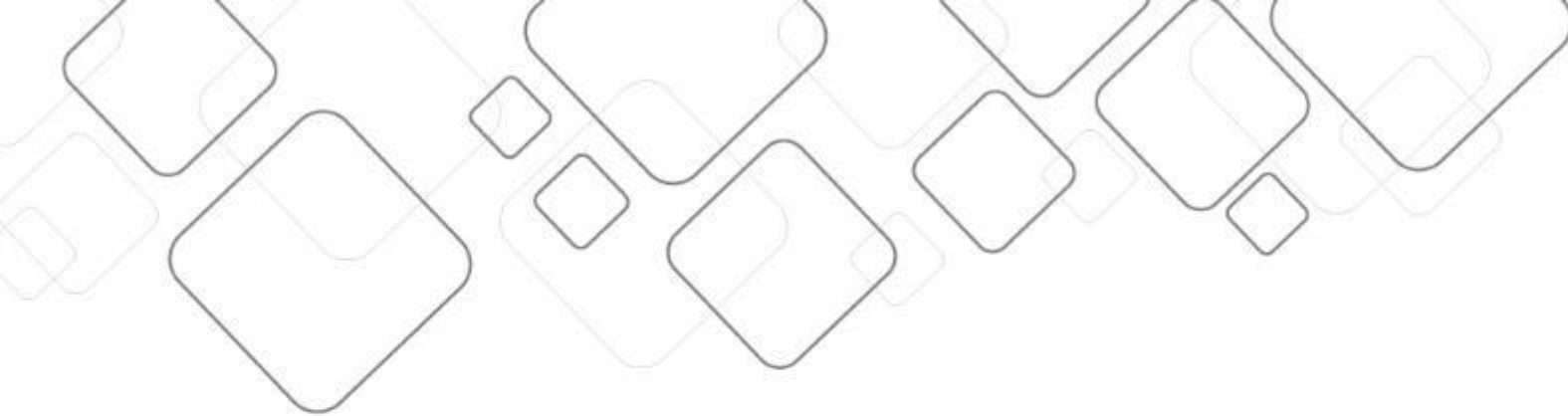
SHORT DEMO

FLUID Admissions Self Service

PREREQUISITES

Prerequisites

- Delivered in PUM Image #7 (current image 9)

- PeopleTools 8.55.10 or higher

- Fluid homepage (for Applicants)

- Identify your population

- Structured process for this population

- Clear definition what to show to applicants

FLUID ADMISSIONS – SETUP

Fluid Admission – Functional Setup

- 1) setup per ADM-action

- 2) setup checklist-for-applicant*

- 3) create Approval workflow*

- 4) define actions for students*

- 5) implement payments*

- 6) Support your team!!!!

Setup for FLUID Admissions

- ☐ Setup per:
  - Institution
  - Career
  - Admit-term

- ☐ Define the flow per "set-of-applicatants"

- ☐ Each set bundles applicants within:
  - Notification Plan
  - Admit type
  - Application Center
  - Program
    - o Per program
    - o Per Program, Plan and Sub-Plan

FLUID Admissions Setup: 'Define Attributes'

| Define Attributes | Display Options | Additional Options | Self Service Requests |

Academic Institution PSUNV   PeopleSoft University

Academic Career UGRD   Undergraduate

Admit Term 0800   2018 Spring

Copy Setup

Applicant Self Service Display   Find | View All   First ◀ 1 of 7 ▶ Last

➕ ➖

Sequence Number 1

***Status** Active ▲▼

Insert Notification Plan Value

Valid Notification Plans   Personalize | Find | 🔲 | 📊   First ◀ 1-3 of 3 ▶ Last

*Notification Plan	Long Name		
ERLY 🔍	Early Admission Decision	➕	➖
REG 🔍	Regular Admission Decision	➕	➖
ROLL 🔍	Rolling Admission	➕	➖

FLUID Admissions Setup: 'Display Options'

FLUID Admissions Setup: 'Additional Options'

| Define Attributes | Display Options | **Additional Options** | Self Service Requests |

Academic Institution PSUNV   PeopleSoft University
Academic Career UGRD   Undergraduate
Admit Term 0800   2018 Spring

Applicant Self Service Display
Find | View All   First ◀ 1 of 7 ▶ Last

Sequence Number 1   **Status** Active

Contact Details

Text ID UG CONTACT INFO 🔍

Accept Decline Options

Display Accept Decline to 04-04-2016 📅

Accept Offer

◯ Activity Guides   ⦿ Modal Confirm

Text ID CONFIRM_ACCEPT 🔍

Manage Response Changes

Allow changes to accepted offer response?
◯ Yes   ◯ No

Activation period

From [   ] 📅   To [   ] 📅

FLUID Admissions Setup: 'Self Service Requests'

+ **Withdraw and Program/Plan change**

Checklists:

- 1) Define what to show

- 2) connect to page (upload or regular component)

Fluid Field Display

- ☐ Organization
- ☐ Variable Data
- ☑ Status
- ☑ Status Date
- ☑ Contact Name
- ☑ Contact Email
- ☑ Due Date

Action Button Label | Upload File

*Menu Name | SAD_APPLICANT_FL | 🔍 | Applicant Fluid

*Component Name | SAD_ATTACH_FL | 🔍 | File Attachment

*Page Name | SAD_ATTACH_FL | 🔍 | File Attachment

Design Approval Workflow

- Delivered Approval Workflow for
  - Deferral
  - Withdraw
  - Prog/Plan change

- 1) paint the approval process per type

- 2) 1-10+ steps

Possible Workflow

Applicant	→	Admissions	→	Faculty Approver
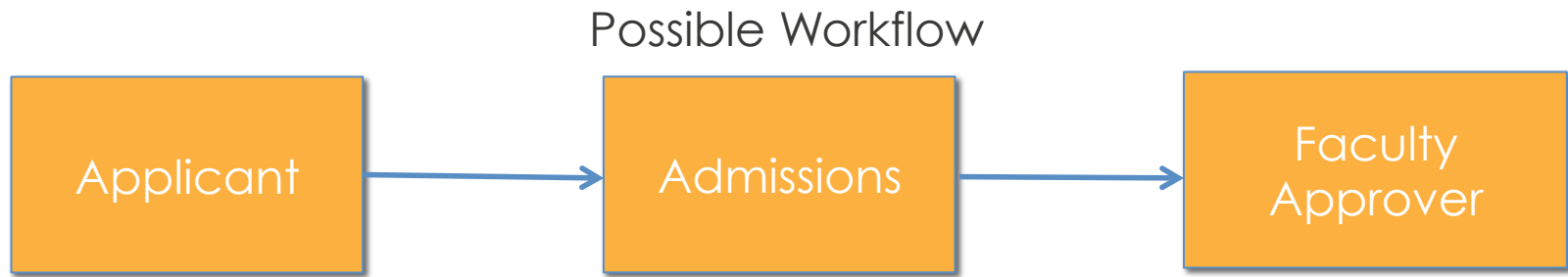
Design Approval Workflow

- **◻ Are your users PS-user?**
  - Use worklist in Fluid
  - Email notifications

- **◻ Transaction after outcome**
  - Manual
  - Automation possible using events
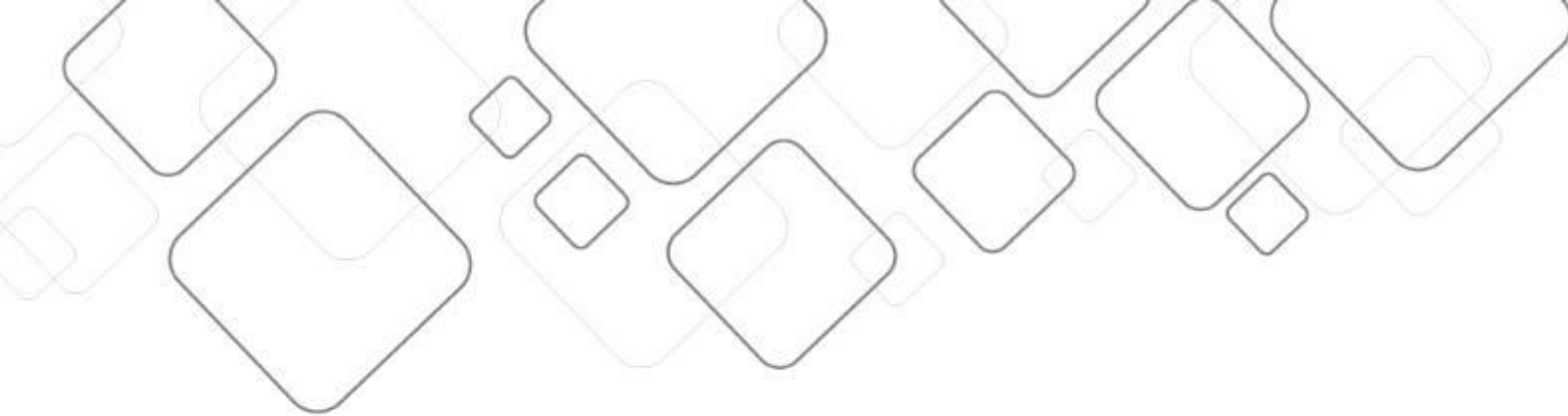
DEMO

Requests

Requests

2018 Spring
Undergraduate
Liberal Arts Undergraduate
PeopleSoft University

Application Status

Requests   1

Request	Request Number	Status	Submitted
Application Withdraw Request ⓘ	1004	Approved	10-10-2018

Checklist overview

Checklist item overview

Upload

Admit letters

Contact

Deposits

Application	To Do List

Application Date 06-26-2018

Application Number 00025087

Academic Plan English (BA)

Status **Enrolling First Year Student** ⓘ

View Decision Letter
Contact Us

Pay Admissions Deposit

Deposits

◻ Student Financials-FLUID functionality

- Using a delivered activity guide

- select payment method and amount

- Integrated 3rd-party option

|		
1 Select Payment Method In Progress	**Step 1 of 6: Select Payment Method**	Confirm
2 Specify Payment Amount Not Started	If you wish to use multiple credit cards or bank accounts to pay off your balance, you will need to submit multiple transactions.	
3 Confirm Payment Amount Not Started	*Pay By Credit Card ⬍	
4 Third Party Page Not Started		
5 Submit Payment Not Started		
6 Payment Result Not Started		
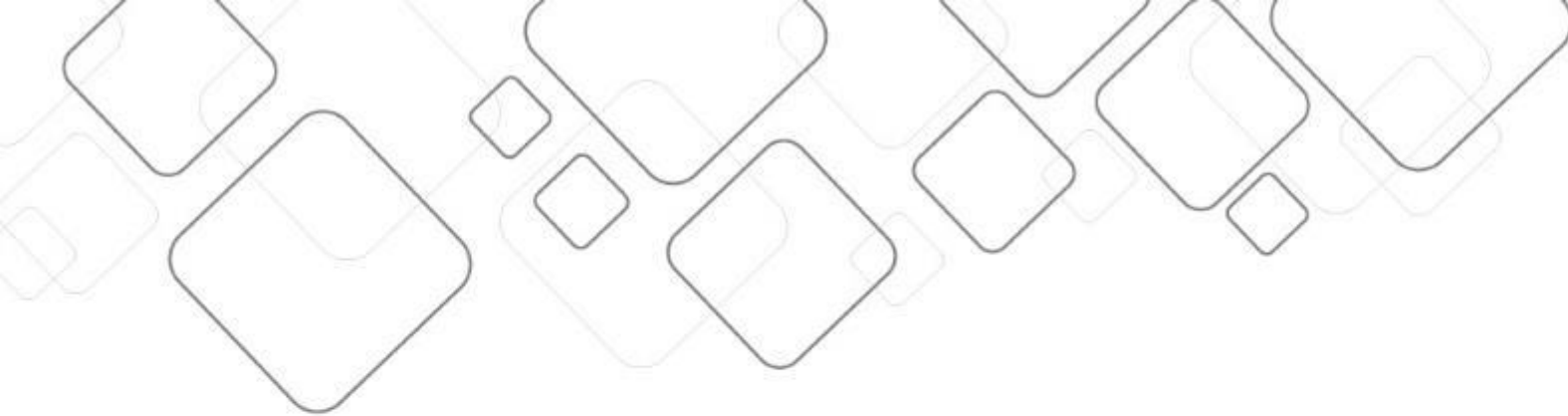
FLUID REGISTRATION

Registration

- ☐ Encourage students to review information on a yearly basis

  - Check program details

  - maintain personal contact information

  - add emergency contacts/relationships

- ☐ Gather (digital) approvals of agreements

  - Financial agreement upon registration

  - Program details/requirements

  - Print agreements!

Registration

▪ Appears in Task List

Requirements for FLUID Registration

◻ Determine the content of the activity guide
- Which pages?
- Agreements

◻ Assign activity guide
- Career
- Admit-term

◻ Nothing more!

Task Configuration

- Maintain the template
  - assign Service Indicators
  - connect notifications
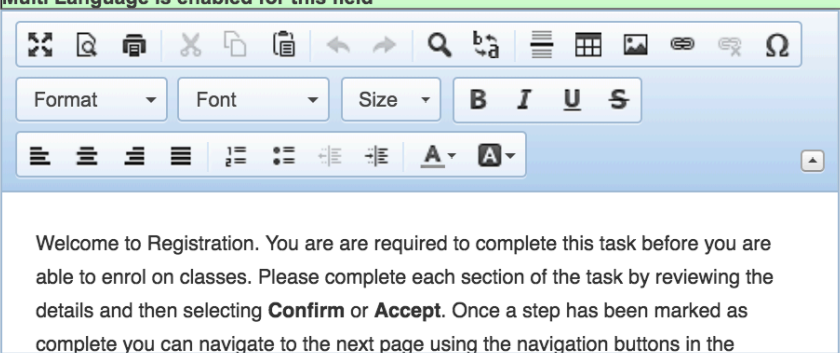 - identify prerequisite/subsequent tasks
- Launch page
  - Activate labels
  - set text values
- Agreements
  - assign multiple agreements in Activity Guide
- Complete
  - set text values

Instruction Text **Multi Language is enabled for this field**

Welcome to Registration. You are are required to complete this task before you are able to enrol on classes. Please complete each section of the task by reviewing the details and then selecting **Confirm** or **Accept**. Once a step has been marked as complete you can navigate to the next page using the navigation buttons in the

☑ **Confirm Button**

Confirm Label Confirm

Setting up Agreements

- Create your own agreement pages
  - Financial
  - Program
  - Privacy
  - etc
- Page/Agreement details
  - HTML-area with
  - set text values
- Agreement Options
  - set your acceptance settings

Agreement Options

⦿ Accept / Decline	☑ Complete on Decline
◯ Accept Only	☑ Print

Accept	Accept
Decline	Decline

DEMO

Activity Guide

Completed Agreements

⟨ Student Homepage	Select Todo

To Do List (2)

Completed Agreements

Completed Agreements

3 rows

Title	Institution	Agreement Date	
Privacy Agreement	PeopleSoft University	10-10-2018	›
Financial Agreement	PeopleSoft University	08-10-2018	›
Privacy Agreement	PeopleSoft University	08-10-2018	›

Summary

◻ Benefits

- Out-of-the-box

- Basic configuration is easy

- File upload functionality

- Requests/approvals stored in Campus Solutions data model

- Clear look-and-feel throughout student lifecycle

◻ Implications

- Can takes some time to design

- Only approvals for pre-defined decisions integrated

- Does it fit your process?
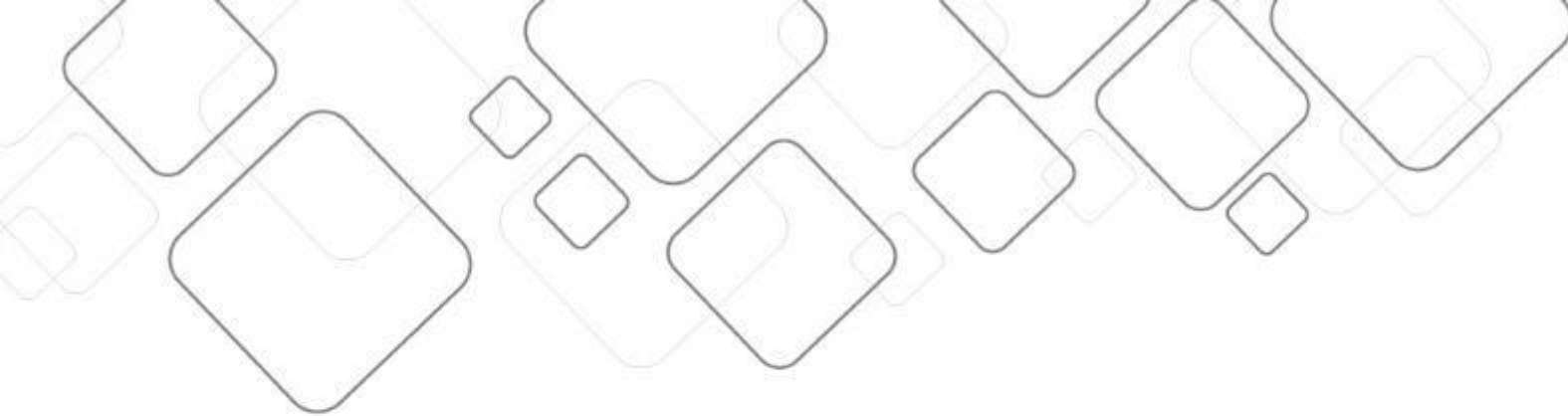
TIPS & TRICKS

When working with Checklists

◘   Explanatory texts

- Show checklists/items per status

- Texts are not dynamic

- Only requirement list checklist type is shown in to do tab!

When working with Deposits

◼ Involve the financial team

- Payment configuration

- self service configuration

When working with Approval Workflow

☐ Delivered settings block the admin menu

- Switch notification options Email/Push off
- Enable worklist notification

Register Transactions

Process ID	SAD_DEFR_APPROVAL
*Description	SAD_DEFR_APPROVAL
Owner ID	Recruiting and Admissions
*Cross Reference Table	SAD_DEFR_XREF
Worklist Prefix	

▼ Notification Options

Enable Notifications
- ☐ Email
- ☑ Worklist
- ☐ Push

▶ Internal URL Definition

▶ External URL Definitions

▶ URL Appending Parameters

▶ Default Approval Component

▶ Approval Event Handler Class

▶ Approval Status Monitor

▶ Transaction Approval Levels

Expand/Collapse All

Further documentation

Oracle docs:
https://docs.oracle.com/cd/E95664_01/cs92pbr9/eng/cs/lsss/
task_ManagingApplicationsUsingPeopleSoftFluidUserInterface.html

PUM 7 Introduction video (admissions/registration):
https://www.youtube.com/watch?v=1a8XitXQQqI&t=2s

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www.cy2.nl/joinslack

Session overview

CY2

9 OCTOBER
10:55 AM - 11:45 AM

Management of non-permanent staff

10 OCTOBER
09:00 AM - 9:50 AM

Page Field Configurator hands on session

10 OCTOBER
01:30 PM - 02:20 PM

Boarding has begun: Student Management Cloud

9 OCTOBER
9:30 AM - 10:30 AM

Keynote

9 OCTOBER
03:45 PM - 04:35 PM

Privacy: Solutions and Anonymization

10 OCTOBER
10:30 AM - 12:20 AM

Deepdive:
Tips & Tricks for FLUID Activity Guides

10 OCTOBER
02:30 PM - 03:20 PM

Fluid Self Service Admissions & Registration