

Fluid Self Service

Admissions

&

Registration

Presenter:

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Session 4536



Presenter

Jochem Koopman

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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?

3

Setup

Prereqs and
steps

5

Registration

Discover
registration
Activity Guide

2

Short Demo

To see the
point...

4

Demo

Explore Fluid
Admissions

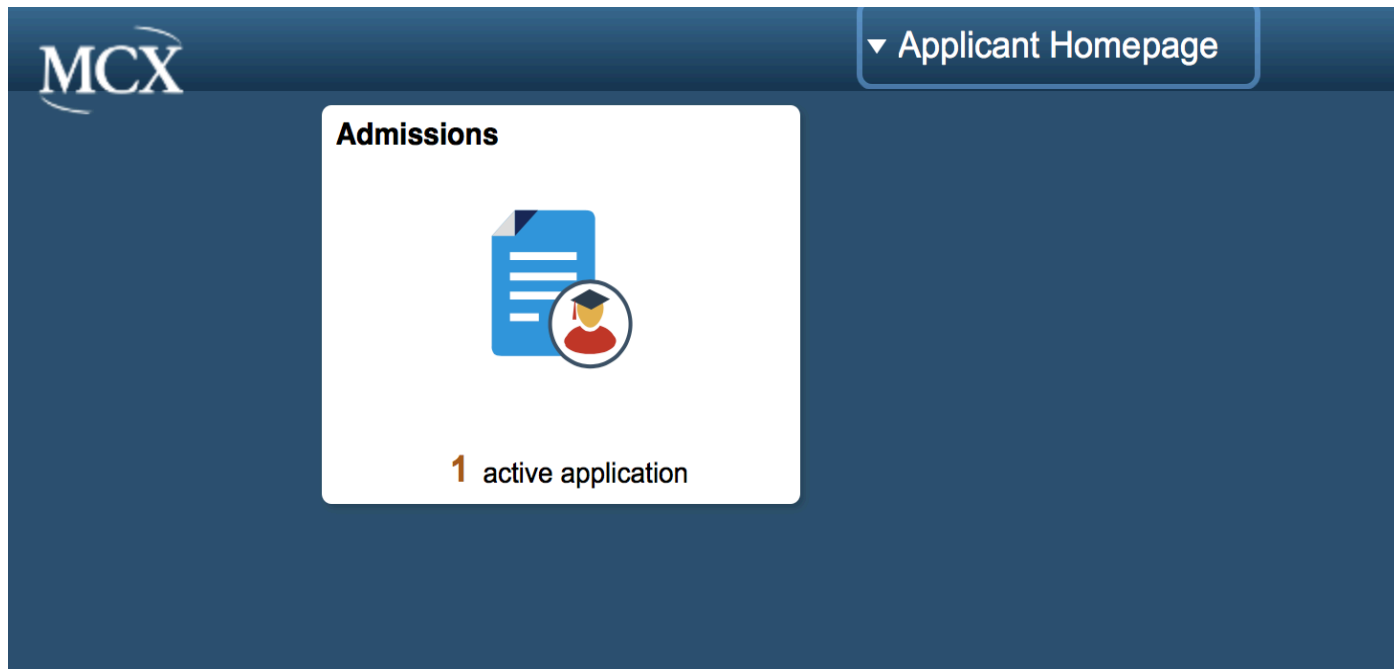
6

Tips & Tricks

Useful insights

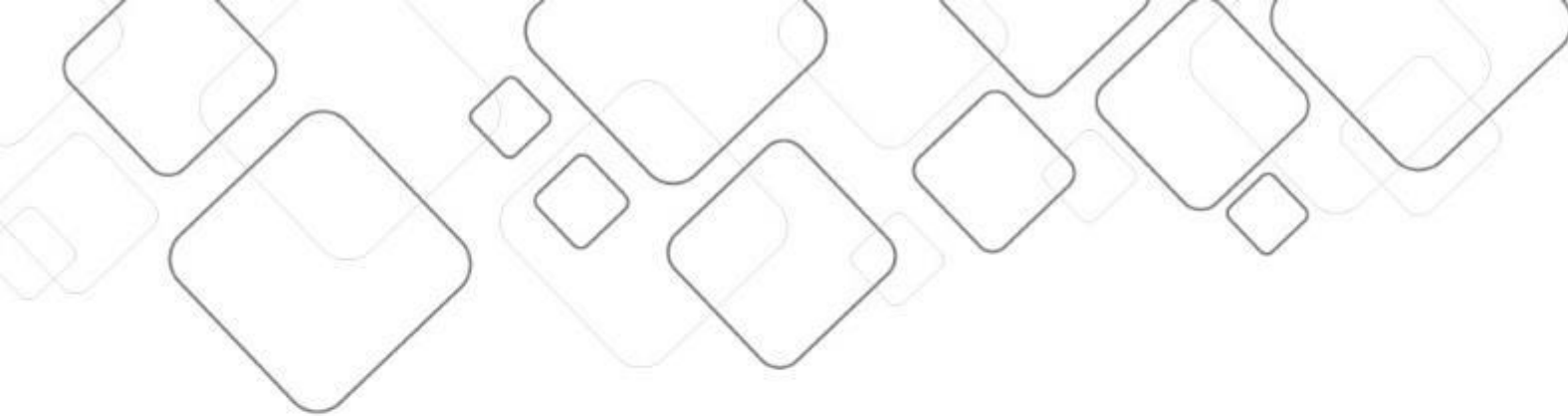
What is it?

- ❑ 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



[← Applicant Homepage](#)

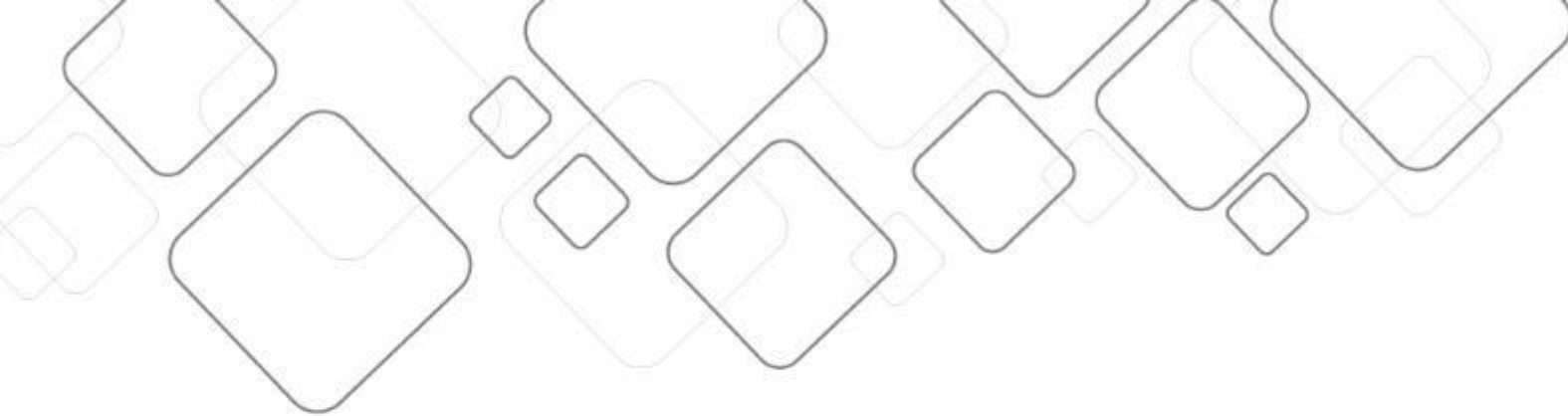
Application Status

2018 Spring
Undergraduate
Liberal Arts Undergraduate
PeopleSoft University

Application Status

Requests

Application	To Do List
Application Date 07-09-2018	
Application Number 00025088	
Academic Plan English (BA)	
Status Enrolling First Year Student	
View Decision Letter Contact Us	
<div>Pay Admissions Deposit</div>	



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-applicants”
- ▣ Each set bundles applicants within:
 - Notification Plan
 - Admit type
 - Application Center
 - Program
 - Per program
 - 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'

[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

Time Period for Application Display

Begins 999 Days Before Term Start Date

Ends 200 Days After Term Start Date

Display Decisions

☐ Manual Activation

Begin Date 04-01-2016

Begin Time 12:00:00AM

End Date 07-30-2018

Display for Program Action

[Find](#) | [View All](#) First 1 of 9 Last

☐ Do Not Display

Program Action ADMT Admit

Action Reason

Action Description Admitted!

Information Text ID UG_ADMIT

[View Message](#)

☒ Display Letter Link

Letter Code F03

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'

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

Request a Deferral of Admission

Deferral Requests Allowed Yes

Page Instruction Text ID UG_DIFF01

Info Icon Text ID UG_DIFF01

Approval Process ID SAD_DEFR_APPROVAL

Approval Definition ID SAD_DEFN_DEFR

Defer Term Range

Personalize | Find | First 1 of 2 Last

Admit Term	Description	
1 0810	2018 Fall	-
2 0800	2018 Spring	-

Add Deferral Term

+ 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

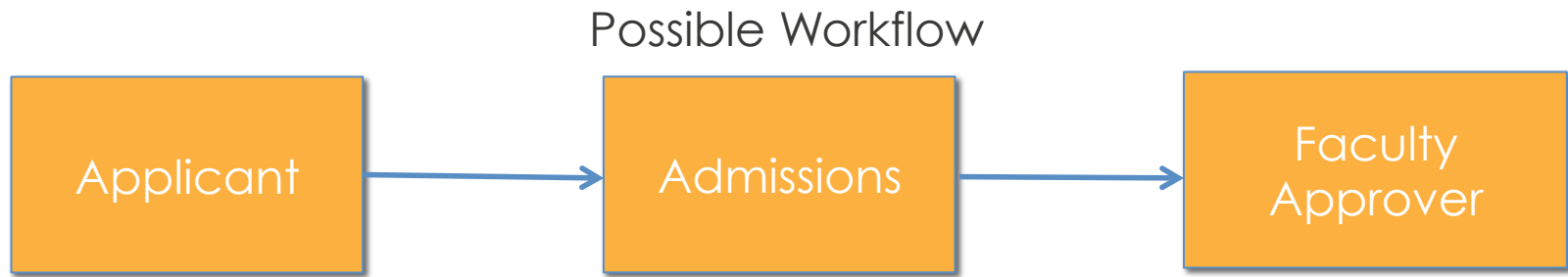
*Menu Name  Applicant Fluid

*Component Name  File Attachment

*Page Name  File Attachment

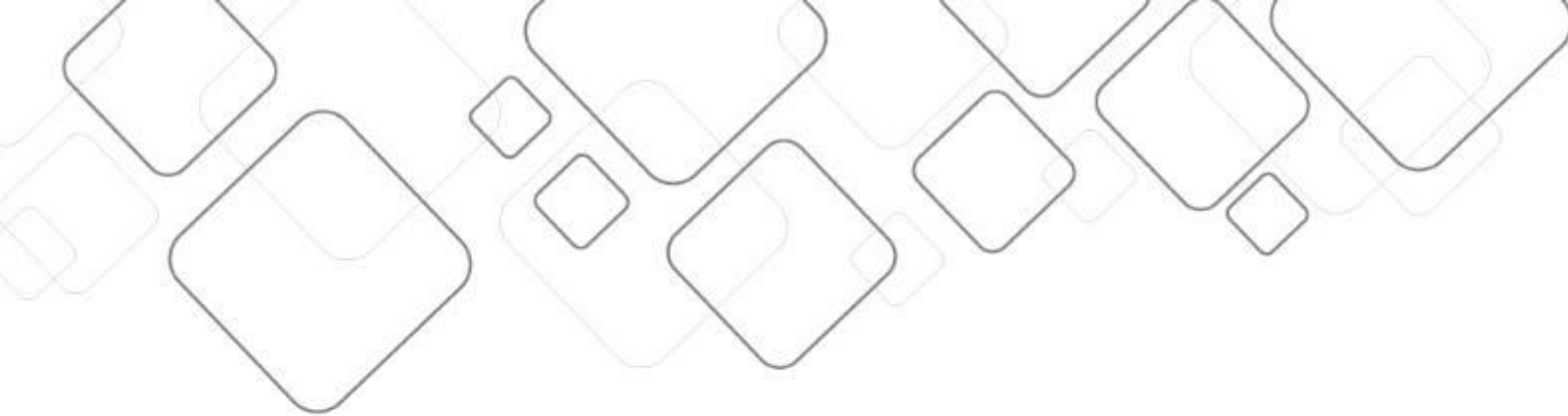
Design Approval Workflow

- Delivered Approval Workflow for
 - Deferral
 - Withdraw
 - Prog/Plan change
- 1) paint the approval process per type
- 2) 1-10+ steps



Design Approval Workflow

- ▣ Are your users PS-user?
 - Use worklist in Fluid
 - Email notifications
- ▣ Transaction after outcome
 - Manual
 - Automation possible using events



DEMO

Requests

< Applicant Homepage
Requests





2018 Spring
Undergraduate
Liberal Arts Undergraduate
PeopleSoft University

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


Checklist overview


[Applicant Homepage](#)


Application Status



2018 Spring
Undergraduate
Liberal Arts Undergraduate
PeopleSoft University

 **Application Status**

 Requests 1

Application	To Do List
	
Emergency Contact 08-08-2018 Initiated	>
Academic Transcripts 08-08-2018 Initiated	>
Heug Entrance Ticket 08-08-2018 Initiated	>
Recommendation Letter 08-08-2018 Initiated	>

Checklist item overview

Application Status

Task Details

Heug Entrance Ticket

Institution

PeopleSoft University

Status

Initiated

Status Date

07-09-2018

Contact

Kay Patel

Due Date

08-08-2018

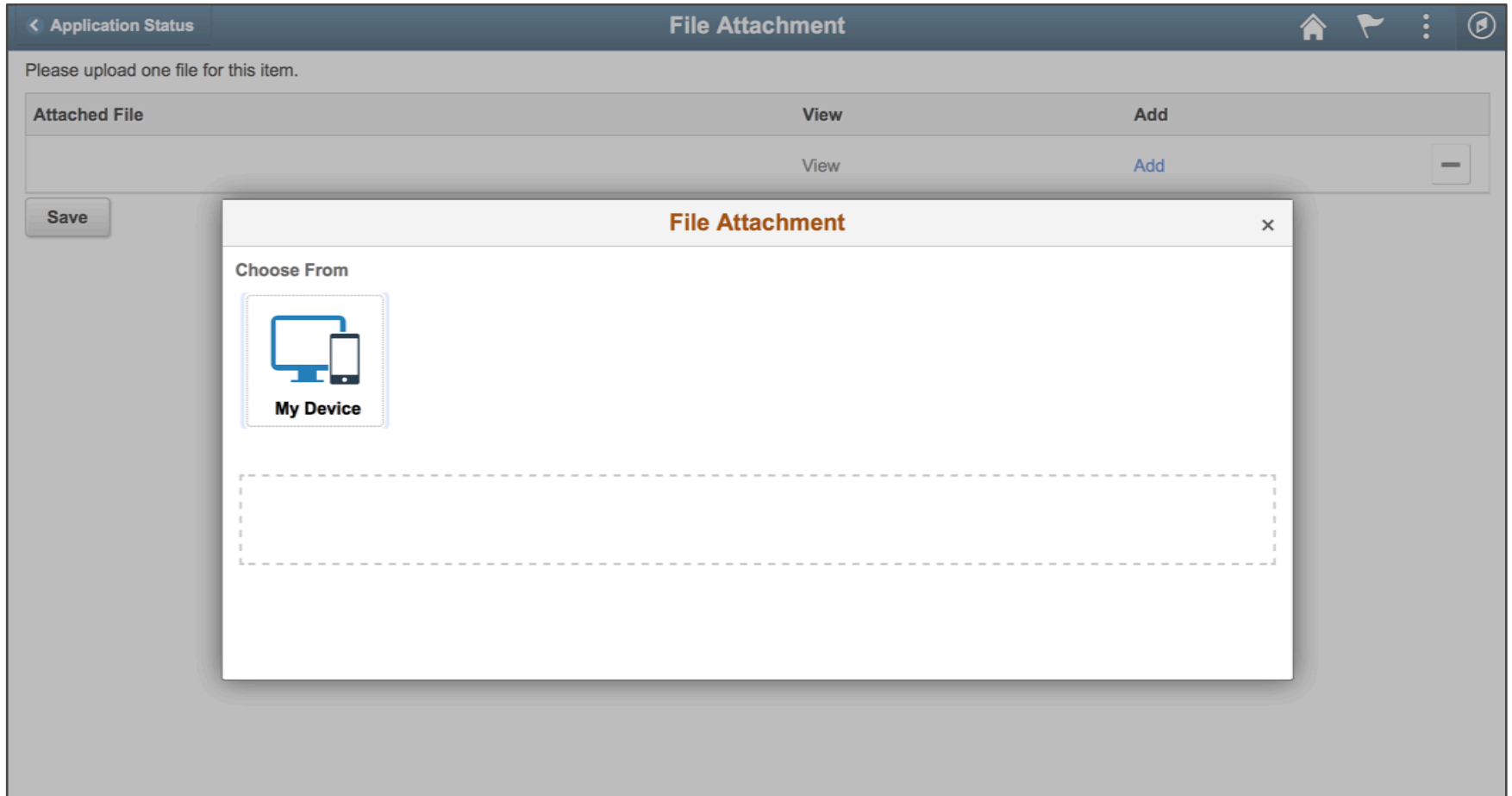
Dear student,

The document is unfortunately not valid. Please upload a valid HEUG-SA entrance ticket. For rules and regulations please visit <http://cy2.nl/>

The Admissions Team

Upload Entrance Ticket

Upload



Admit letters

[Applicant Homepage](#)

Application Status




2018 Spring

Undergraduate

Liberal Arts Undergraduate

PeopleSoft University

Application Status

 Requests

1

Application

Application Data

Application Number

Academic Plan

Status

[View Decision Letter](#)
[Contact Us](#)

ORACLE

F03 - ENG

Nicolette Jorgensen

Student ID: 0139

Date: Jul 9, 2018

Dear Nicolette,

Congratulations! We are pleased to tell you that you have been admitted as a first year student to PeopleSoft University Class of 2020.

Institution:PSUNV
Career:UGRD
Admit Term:0800
Application Number:00025088
Appl Prog nbr:
Program Action:
Action reason:
Program:LAU
Admit Type:
Notification Plan:
Application Center:UGRD

Communication Seq: 1
Var_DATA_SEQ: 1

If you have any questions, please contact the Admissions Office at 888-555-1212.
Sincerely,

Barbara Smith
Admissions Office

Contact


2018 Spring

Undergraduate

Liberal Arts Undergraduate

PeopleSoft University

Application Status



Requests

1

Application

Application Date 07-09

Application Number 00025

Academic Plan English

Status **Applied**

[View Decision Letter](#)
[Contact Us](#)

Application Status

Contact Us

Need help or more information about your application?


Contact: Jochem Koopman

Phone: +31/634576845

Email: jochem@cy2.nl

Check out our [website](#) for helpful information about the application process.

Deposits

	Application	To Do List
1	<p>Application Date 06-26-2018</p> <p>Application Number 00025087</p> <p>Academic Plan English (BA)</p> <p>Status Enrolling First Year Student </p> <p>View Decision Letter Contact Us</p> <p>Pay Admissions Deposit</p>	

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

2

Specify Payment Amount
Not Started

3

Confirm Payment Amount
Not Started

4

Third Party Page
Not Started

5

Submit Payment
Not Started

6

Payment Result
Not Started

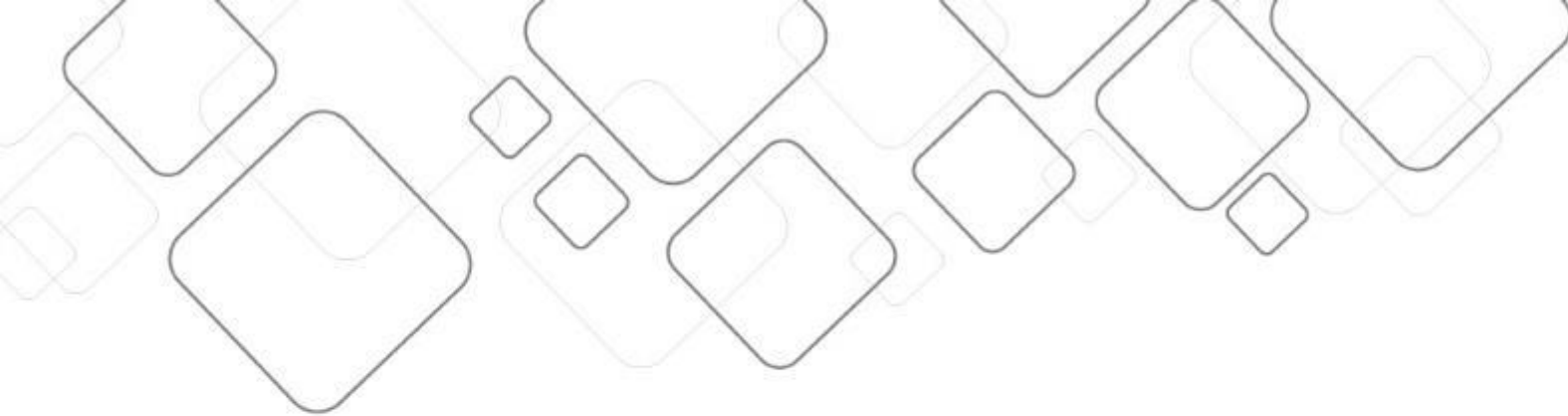
Step 1 of 6: Select Payment Method

If you wish to use multiple credit cards or bank accounts to pay off your balance, you will need to submit multiple transactions.

*Pay By

Credit Card ▾

Confirm



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

▼ Student Homepage



<div>Academic Progress</div> <div></div> <div>The Academic Requirements report is not available.</div>	<div>Academic Records</div> <div></div>	<div>Financial Account</div> <div>To access this information, contact the Bursar's office to complete your account profile.</div>	
<div>Financial Aid</div> <div></div>	<div>Manage Classes</div> <div></div>	<div><div>Profile</div><div></div><div>STDNT1</div></div>	<div><div>Tasks</div><div></div><div>1 To Do's</div></div>

Requirements for FLUID Registration

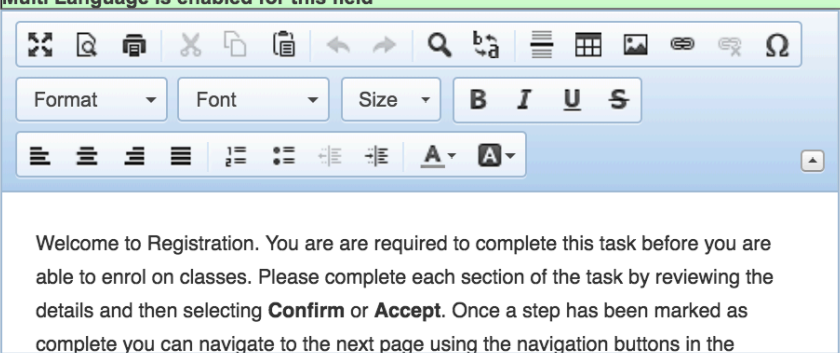
- Determine the content of the activity guide
 - Which pages?
 - Agreements
- Assign activity guide
 - Career
 - Admit-term
- Nothing more!

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



The screenshot shows a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and insert link. Below the toolbar are dropdown menus for Format, Font, and Size, followed by buttons for Bold (B), Italic (I), Underline (U), and Strikethrough (S). The text area contains the following text: "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**

☐ **Accept Only**

☒ **Complete on Decline**

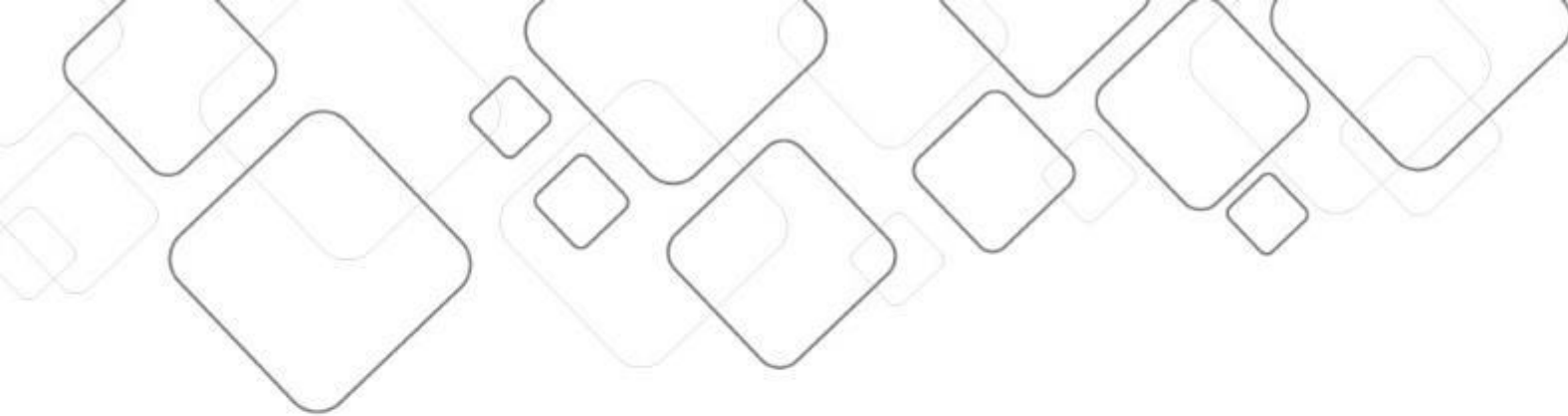
☒ **Print**

Accept

Accept

Decline

Decline



DEMO

Activity Guide

✕ ExitFluid Registration-0🚩< PreviousNext >⋮

0154

1 Introduction
Complete

2 Contact Details
Complete

3 Addresses
Complete

4 Emergency Contacts
Complete

5 Academic Regulations
Complete

6 Financial Agreements
Not Started

7 Complete Task
Not Started

Step 5 of 7: Academic Regulations

Privacy Regulation Agreement

Please review the University privacy regulations below. Once you have reviewed the details please select **Accept** to confirm your agreement.

Yes, truly, we are not evil and protect your data at all costs!

Agreement Date 10-10-2018

Agreement Status Accepted


Printable Page

AcceptDecline


Completed Agreements

< Student Homepage

Select Todo

 To Do List

2

 Completed Agreements

Completed Agreements

3 rows

<div>↕</div>		
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 >

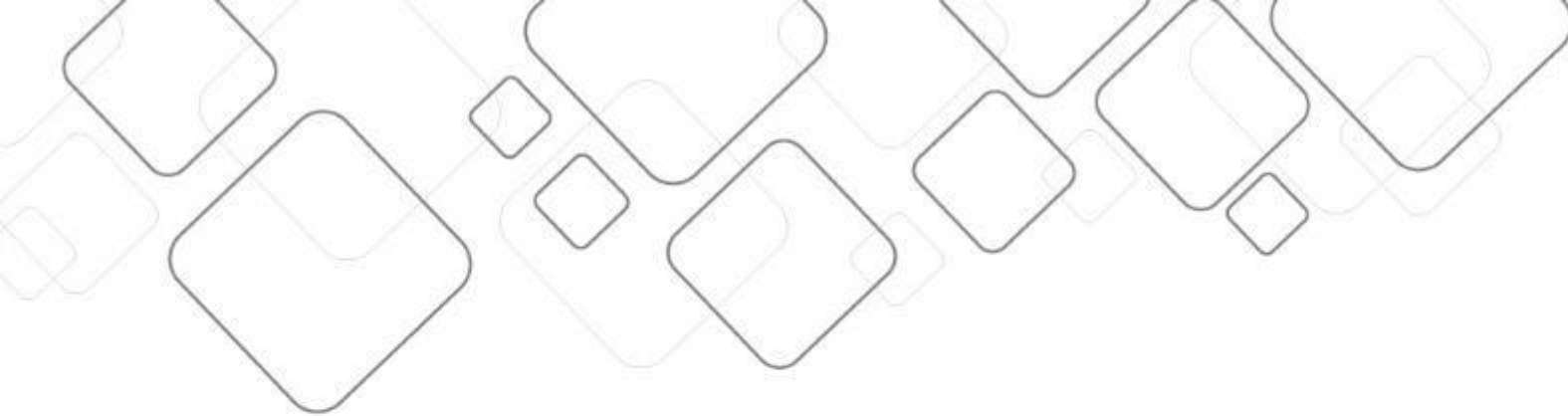
Summary

□ 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!

Item List							Personalize	Find	First	1-4 of 4	Last
*Sequence	*Item Code	Description	Default Due Date	Due Days	Hide	Communication Key					
100	TOEFL	TOEFL		30	<input type="checkbox"/>						
200	DEAN	Dean's Rpt		30	<input type="checkbox"/>						
300	MEDIC	Medic App		30	<input type="checkbox"/>						
400	TRANS	Transcpts		30	<input type="checkbox"/>						

Display Checklist Items			Personalize	Find	First	1 of 1	Last
*Item Status							
Initiated							

When working with Deposits

□ Involve the financial team

- Payment configuration
- self service configuration

General Options

Electronic Payments

Business Units

Institution Set

PSUNV

*Description

PeopleSoft University

*Base Currency

USD

Self Service Options

☒ Accept Self-Service Payments

☐ Allow Payment Plan Enrollment

☒ Display Student Permissions

☐ Tuition Calc Required

☐ Display Tuition Calc Message

☐ Allow Use in Service

Maximum Payments in Service

☒ Accept Miscellaneous Purchases

☐ Display 1098-T Self Service

☒ Grant Student Permissions

Days in future for 'due now'

☐ Manage My Bank Accounts

☐ Allow Change in Country

☐ Direct Deposit Enrollment

Fluid Options

☒ Direct Deposit Enrollment

☐ Allow Change in Country

☐ Allow Revocation

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/lss/task_ManagingApplicationsUsingPeopleSoftFluidUserInterface.html

PUM 7 Introduction video (admissions/registration):

<https://www.youtube.com/watch?v=1a8XitXQQql&t=2s>



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Ask questions, provide answers,
discuss, participate within our Slack
channel.

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