

CY2

Fluid Self Service

Admissions

&

Registration

Presenter:

Jochem Koopman

10-10-2018

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?

2

Short Demo

To see the point...

3

Setup

Prereqs and steps

4

Demo

Explore Fluid Admissions

5

Registration

Discover registration
Activity Guide

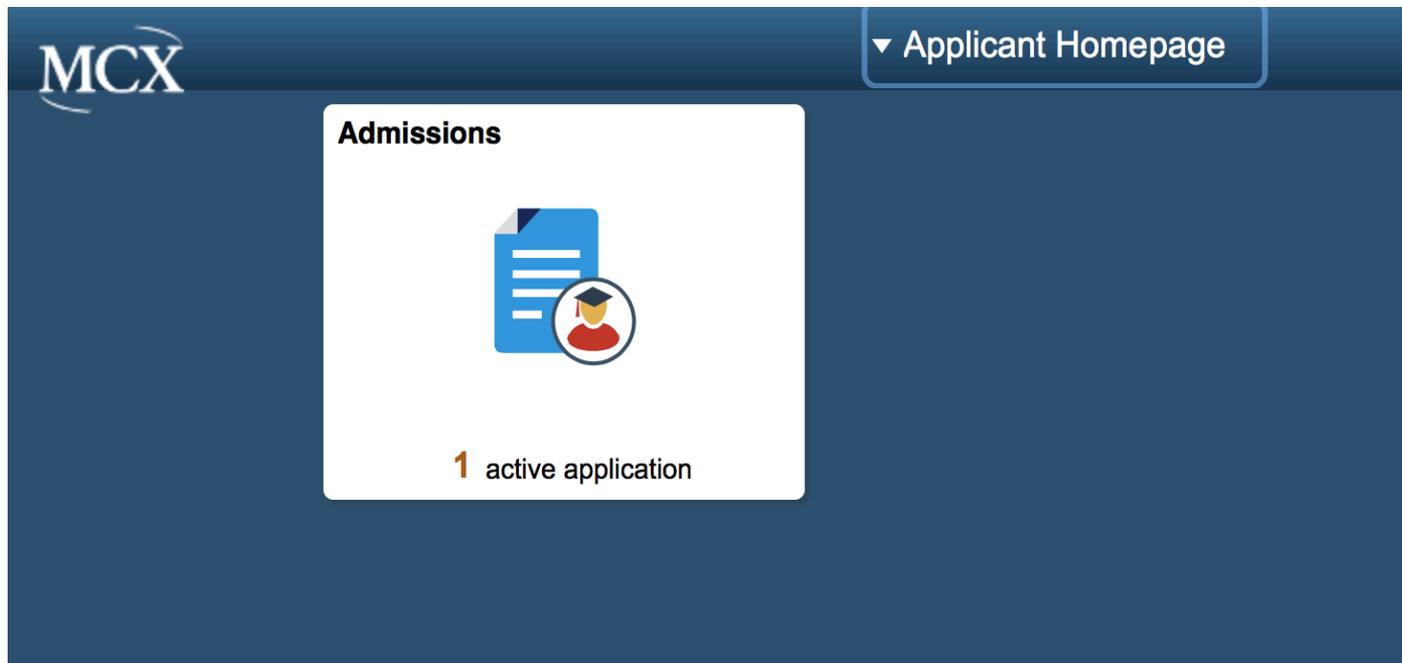
6

Tips & Tricks

Useful insights

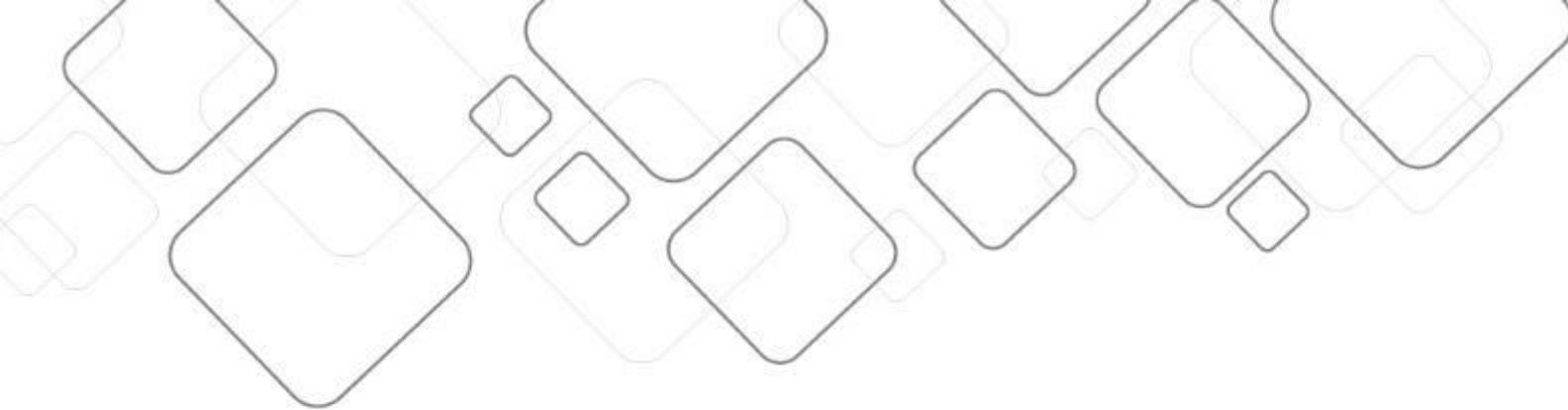
What is it?

- 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

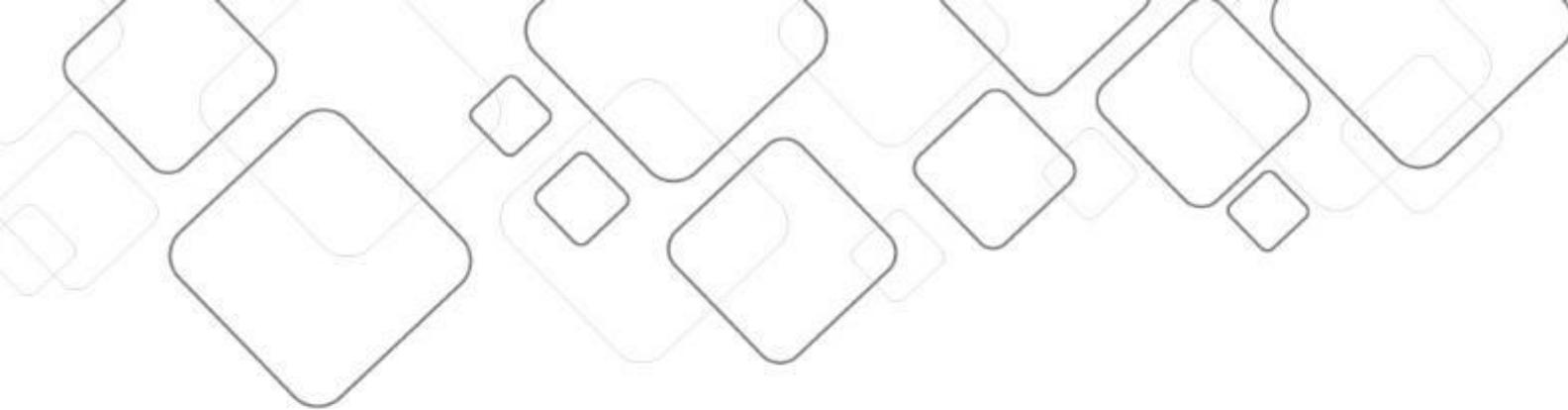
FLUID Admissions Self Service



[← Applicant Homepage](#) **Application Status**    

2018 Spring
Undergraduate
Liberal Arts Undergraduate
PeopleSoft University

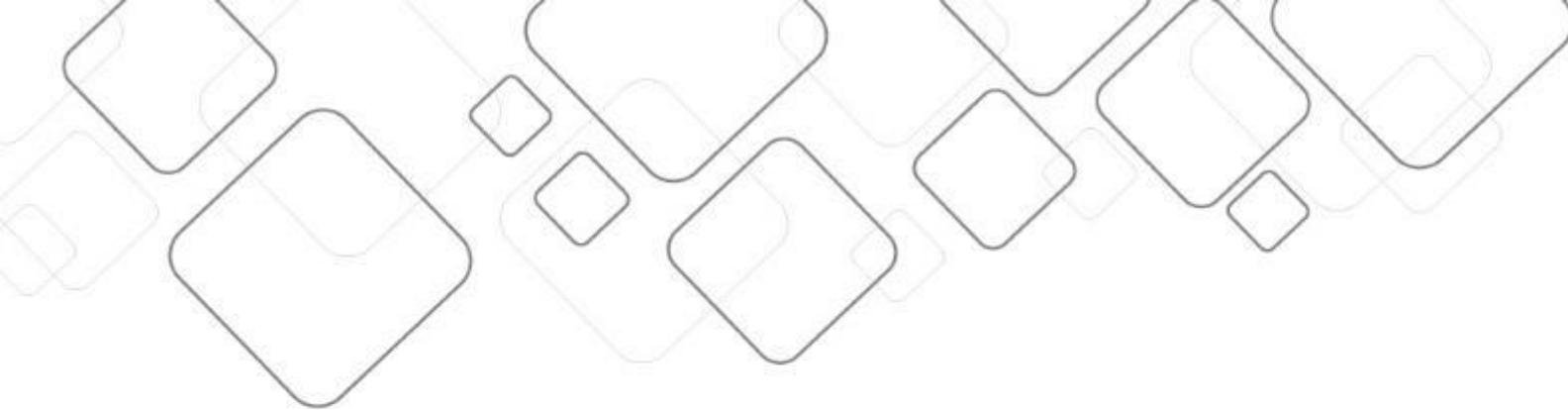
 Application Status	Application	To Do List
 Requests	<p>Application Date 07-09-2018</p> <p>Application Number 00025088</p> <p>Academic Plan English (BA)</p> <p>Status Enrolling First Year Student </p>	
	<p>View Decision Letter Contact Us</p> <p>Pay Admissions Deposit</p>	



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

*Status

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 1-2 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

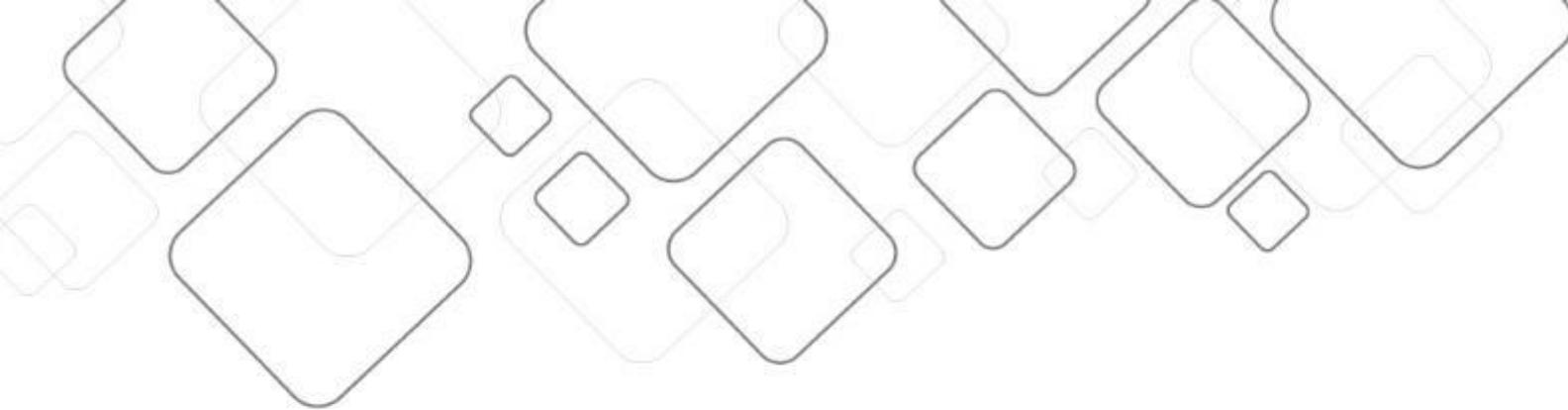
- Delivered Approval Workflow for
 - Deferral
 - Withdraw
 - Prog/Plan change
- 1) paint the approval process per type
- 2) 1-10+ steps



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

 Application Status

 **Requests** 1

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

< Application Status **File Attachment**    

Please upload one file for this item.

Attached File	View	Add
	View	Add

Save

File Attachment ×

Choose From



My Device

Admit letters

[Applicant Homepage](#)

Application Status



2018 Spring
Undergraduate
Liberal Arts Undergraduate
PeopleSoft University

Application Status

Requests

1

Application

Application Da
Application Numbr
Academic Pl
Stat

[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

← Applicant Homepage

Application Status



2018 Spring

Undergraduate

Liberal Arts Undergraduate

PeopleSoft University

Application Status

Requests

1

Application

Application Date 07-09

Application Number 00025

Academic Plan English

Status Appli

[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.

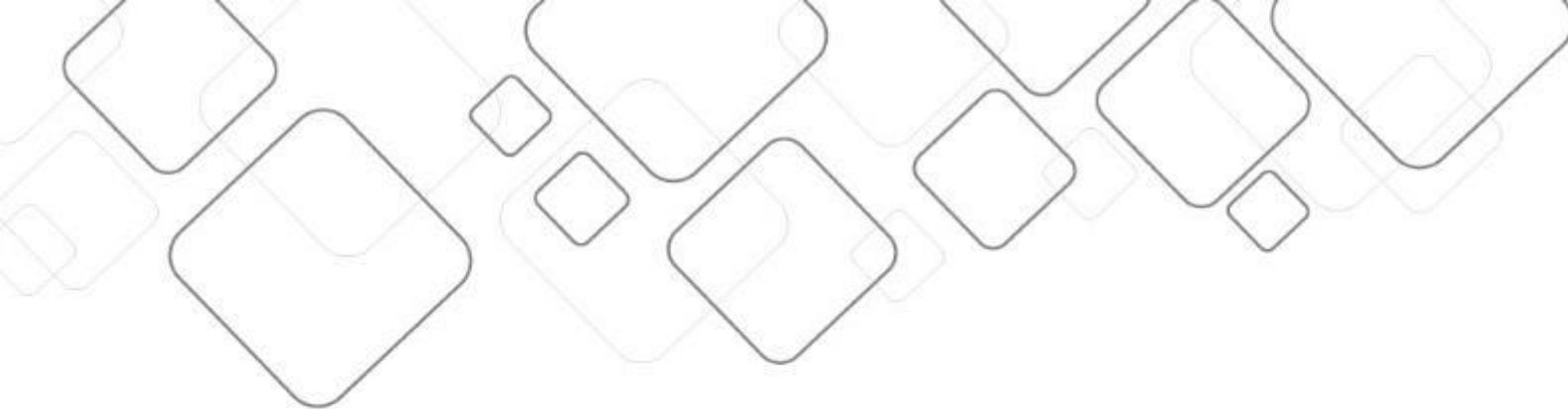
Deposits

	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</p> <p>Contact Us</p> <p data-bbox="730 996 1248 1139">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	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 <input type="text" value="Credit Card"/>	Confirm
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		



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 

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

Requirements for FLUID Registration

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

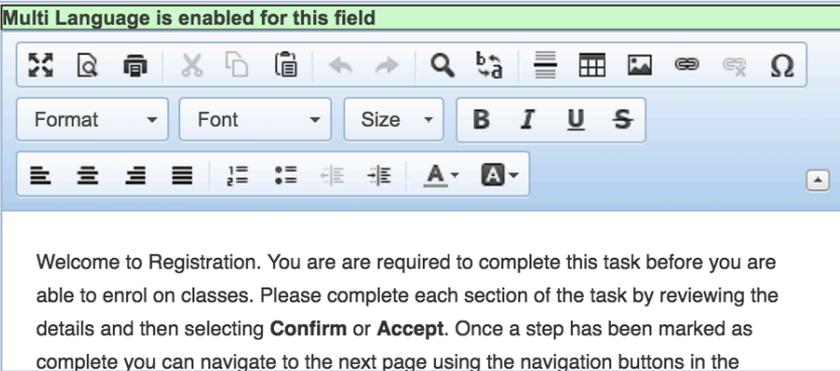
- Assign activity guide
 - Career
 - Admit-term

- 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

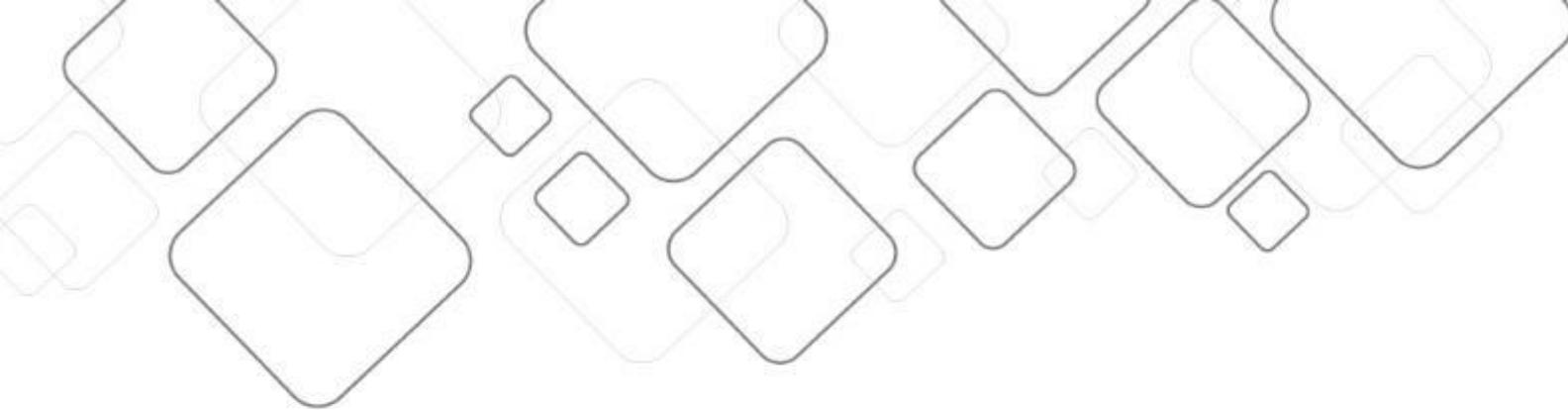
- Create your own agreement pages
 - Financial
 - Program
 - Privacy
 - etc
- Page/Agreement details
 - HTML-area with
 - set text values
- Agreement Options
 - set your acceptance settings

Agreement Options

<input checked="" type="radio"/> Accept / Decline	<input checked="" type="checkbox"/> Complete on Decline
<input type="radio"/> Accept Only	<input checked="" type="checkbox"/> Print

Accept

Decline



DEMO

Activity Guide

✕ Exit Fluid Registration-0 < Previous Next > ⋮

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](#)

[Accept](#) [Decline](#)

Completed Agreements

Student Homepage Select Todo **Completed Agreements**    

 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	>

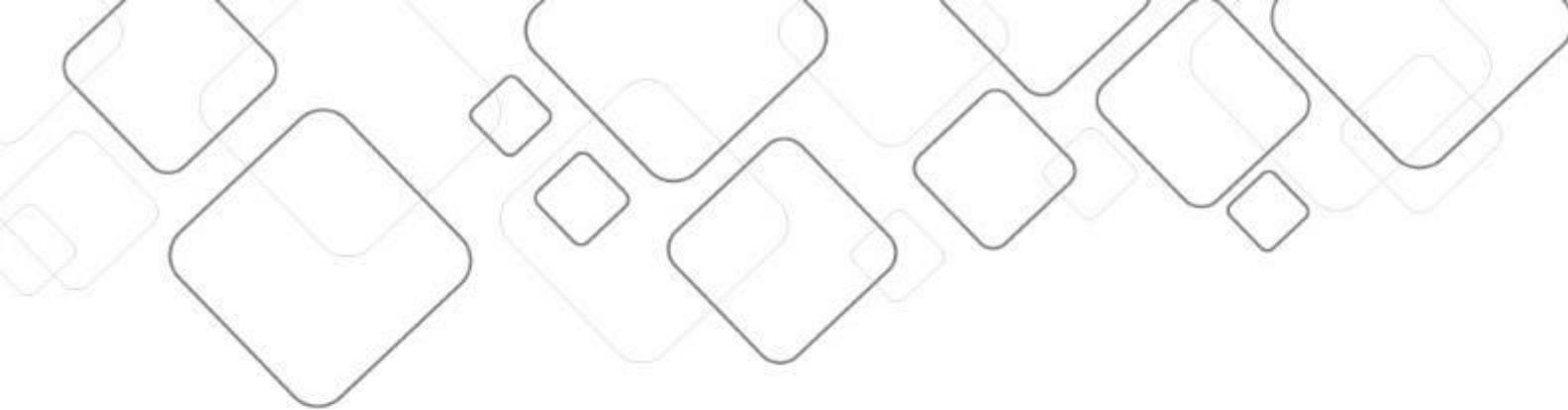
Summary

□ 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!

Item List							Personalize	Find	Print	Calendar	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	Print	Calendar	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

<input checked="" type="checkbox"/> Accept Self-Service Payments	<input checked="" type="checkbox"/> Accept Miscellaneous Purchases
<input type="checkbox"/> Allow Payment Plan Enrollment	<input type="checkbox"/> Display 1098-T Self Service
<input checked="" type="checkbox"/> Display Student Permissions	<input checked="" type="checkbox"/> Grant Student Permissions
<input type="checkbox"/> Tuition Calc Required	Days in future for 'due now' <input type="text"/>
<input type="checkbox"/> Display Tuition Calc Message	<input type="checkbox"/> Manage My Bank Accounts
<input type="checkbox"/> Allow Use in Service	<input type="checkbox"/> Allow Change in Country
Maximum Payments in Service <input type="text"/>	<input type="checkbox"/> Direct Deposit Enrollment

Fluid Options

<input checked="" type="checkbox"/> Direct Deposit Enrollment
<input type="checkbox"/> Allow Change in Country
<input type="checkbox"/> 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/lsss/task_ManagingApplicationsUsingPeopleSoftFluidUserInterface.html

PUM 7 Introduction video (admissions/registration):

<https://www.youtube.com/watch?v=1a8XitXQQqI&t=2s>



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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

