

# PEOPLESOFT CAMPUS SOLUTIONS FEATURE PACK 1: CONSTITUENT MANAGEMENT



## KEY FEATURES

- Constituent Web Service
- External Search / Match
- Affiliations

## BENEFITS TO HIGHER EDUCATION WITH THIS FEATURE PACK

- Share constituent data between Campus Solutions and other systems where person information is stored
- Increase the accuracy and reduce duplicates of person-data
- Understand all the relationships an individual has with your institution
- Improve communications and the quality of interaction with all your constituents through more complete and accurate information about them

*Colleges and universities are uniquely challenged when it comes to capturing and maintaining accurate information about every person associated with the institution. Besides dealing with changing roles and personal data, higher education institutions support a myriad of systems in which individual data is captured and stored. This not only creates problems with duplicate or erroneous data, it also limits an institution's visibility into the many different affiliations an individual has with the organization. With this new update, higher education customers will be able to exchange an individual's data stored in PeopleSoft Campus Solutions with other systems distributed throughout their institutions—saving time and resources and improving the accuracy of the information maintained about prospects, applicants, students, alumni, donors, faculty, staff, and other constituents that interact with their institutions.*

## Overview of Constituent Management

Enriching and extending the quality of information an institution has about individuals and organizations that interact with it is the goal of Constituent Management and the focus of the new Campus Solutions 9.0 Feature Pack 1. Increasingly, colleges and universities want complete, current and accurate information about each individual that interacts with their institution. Is the applicant to graduate school also an employee of the university? Is the student's parent also an alumni? Does a change of name and address the employee just submitted in the human resources system need to be updated in other systems' data bases? When a student applicant is accepted, enrolls and is hired for a part-time position, is the institution able to see and manage the student's various roles or affiliations?

A constituent in Campus Solutions represents the individuals (persons) and external organizations that form the basis of a business activity or process throughout your institution. Individuals and organizations are the foundation of higher education business processes, and managing the data for these constituents typically occurs across a widely distributed number of systems.

“Oracle’s Feature Pack 1 for CS 9.0 provides a coherent and well thought out foundation for addressing the perennial problems of sharing and synchronizing information about the many people affiliated with a university across a diverse array of systems and also keeping track of exactly how those constituents are connected to the institution. The new Constituent Web Service should allow us to streamline the integration of Campus Solutions to our many auxiliary systems, and the new Affiliations functionality with its associated architecture looks like a huge step forward from the old Relations With Institution table. These new features reflect the ongoing close collaboration between Oracle and the Higher Education User Group (HEUG), specifically through the working groups that Oracle and the HEUG have established to examine these issues.”

Steve Grantham,  
Coordinator for Data  
Quality and Reporting,  
Boise State University

Knowing the various ways an individual interacts with the institution helps faculty and staff improve communications, manage relationships, and provide informed and personalized support for all their constituents.

Until recently, connecting all these pieces of information about an individual was complex and costly because it required significant resources to integrate data between systems and purge duplicate or inaccurate information from multiple databases. Additionally, every institution—and sometimes departments within the same institution—had different ideas about which system or set of data about an individual or organization should have priority over another.

Demonstrating Oracle’s commitment to modernizing the Campus Solutions’ architecture, this and future feature packs will include SOA-based functionality. By gradually shifting PeopleSoft Enterprise Campus Solutions to a SOA, Oracle is delivering next-generation functionality while supporting existing implementations and helping higher education customers avoid high costs and risks. Campus Solutions 9.0 Feature Pack 1 delivers the following new features and functionality:

- Constituent Web Service
- External Search / Match
- Affiliations

### Constituent Web Service

The Constituent Web Service delivered in Campus Solutions Feature Pack 1 is the first step in a continuing, iterative approach to migrate customers to the next-generation applications on SOA. As customers uptake each new feature pack, they will begin to realize the benefits of how web services enhance interoperability; applications built on different technologies and implemented on various platforms can share information with each other. Interoperability promotes your ability to add or upgrade systems with less effort. Web services provide re-usable application components, enabling one service to be used by multiple applications and other services.

The Constituent Web Service delivered in CS Feature Pack 1 is a service that contains information about a constituent so Campus Solutions can communicate and exchange data with other systems where information about that same individual is, or could be, stored. This means any system that supports web services that requires data about a person, such as data hubs, human resources, parking systems, housing systems, identity management systems, etc., can leverage this new service.

The Constituent Web Service provides the first step in deploying a holistic web services-based integration solution for higher education. Future feature packs are expected to add organization data as well as increase the scope of person data to further extend the power and flexibility for constituent management. The long-term vision is to service-enable Campus Solutions across all business processes.

The following person data is included in Feature Pack 1:

Person-data in Campus Solutions 9.0 Feature Pack 1	
Biographic Data	
Name	Birth Date
Birthplace	Birth Country
Birth State	Date of Death
Place of Death	Death Certificate Number
Marital Status	Gender
Campus ID	National ID
Contact Information	
Addresses	Email Addresses
Phone Numbers	
Institution Affiliations	
Privacy (flag indicating presence of FERPA elections)	

**Web Service Functionality in Feature Pack 1**

Common scenarios in which constituent data are used include adding, updating, deleting, viewing, and querying information about a constituent. The following operations will be supported in Feature Pack 1:

**Inbound Requests**

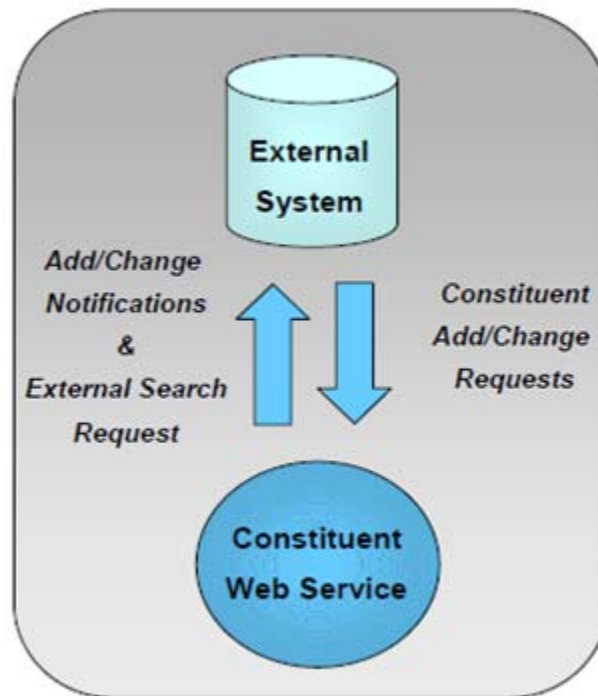
This is a request from a system external to Campus Solutions that wants to act upon information about an individual stored within Campus Solutions. These include the ability to view or update data for an existing constituent.

**Outbound Requests**

This is a published message from Campus Solutions to an external system indicating that some action has been taken on a constituent in Campus Solutions. These include the notification messages for a created, updated, or deleted constituent as well as a response to a request to view information about a constituent.

“There is a growing realization in higher education that institutions need to be asking if their vendors are making investments today that support long-term strategic direction for the technology products they deliver. Oracle’s release of this first new feature pack for their Campus Solutions application is evidence that Oracle is investing in and delivering on a vision of how application solutions for higher education should evolve to meet institution’s needs today and far into the future.”

Nicole Engelbert,  
Lead Analyst for  
Education, Datamonitor



**Diagram of Constituent Web Services Responsibilities**

### **External Search / Match**

Higher education institutions have many systems on campus that contain information about individuals, e.g. library, health, housing, and alumni systems. Maintaining a consistent, accurate view of a constituent across all these systems is a challenge. As a result, some institutions are moving to a central directory or registry to contain the core data for an individual, others are pursuing a master data management strategy using a data hub. Therefore, Campus Solutions is leveraging the Constituent Web Service to deliver External Search / Match which facilitates the reduction of duplicate records between Campus Solutions and all the other systems in an institution.

The following External Search / Match capabilities are delivered in Campus Solutions Feature Pack 1:

- Display to the user the most complete and meaningful list of potential duplicate individual records.
- Standardize the user experience so the experience is the same when performing an external system search as it is for a search within Campus Solutions. This feature includes triggering internal and external Search / Match at the same time and combining search results.
- Enable customers to take full advantage of the data hub search engines.
- Display search results coming from a hub whether or not the constituent has a Campus Solutions record. Also, allow users to import a record into

Campus Solutions when the match found does not have a record in Campus Solutions.

- Provide a generic solution that can be integrated with any hub or search engine solution the higher education customer might be using.

Oracle expects that the most common external Search / Match scenario in higher education will be between Campus Solutions and a data hub. Therefore, Campus Solutions Feature Pack 1 is designed to work with a data hub. The types of searches an institution can perform between Campus Solutions and a data hub replicate existing functionality for Search / Match: Automatic Search (embedded in specific PIA pages) and Online Search (initiated from a separate component).

In both cases, when the user activates the search, the Campus Solutions External Search / Match component will evaluate the data hub settings. If an external Search / Match is triggered, an outbound query request is published to the data hub.

Oracle has also enhanced the Search Results page in Campus Solutions by adding some new capabilities and modifying the grid to show more information from the data hub. These enhanced new results include:

**Score %.** This shows the weight of the match to the query. It is a configurable field, so if the hub isn't using weighting, this column can be set so it does not display.

**Import.** It is possible to import a constituent into Campus Solutions when there is no record of an ID for the individual in Campus Solutions.

**Detail View.** This additional information is shown when there is no record of an ID for the individual in Campus Solutions. The page displays all the constituent information returned by the external system or data hub.

### Search Results

Search Type: Person  Ad Hoc Search  
 Search Parameter: PSCS\_TRADITIONAL CS\_Person\_Traditional  
 Result Code: PSCS\_TRAD\_MASK CS\_Pers Traditional Result Mask

▼ Search Results Summary [Return to Search Criteria](#)

Number of ID's Found: 27  
 Search Order Number: 10 Name,Addr,City,Bday,Gender,SSN

Search Results								
Score %			Emplid	Name Type	Name Effective Date	First Name	Middle Name	Last Name
80	<a href="#">Import</a>	<a href="#">Detail</a>		PRF		Johnny Past		Smit Past
	<a href="#">Import</a>	<a href="#">Detail</a>		PRI		Johnny	T.	Smitzerland
	<a href="#">Import</a>	<a href="#">Detail</a>		PRF				Smitzer
	<a href="#">Import</a>	<a href="#">Detail</a>		MDN		Johna		Smit-Maiden
	<a href="#">Import</a>	<a href="#">Detail</a>		PRF		Johnny Past		Smit Past
	<a href="#">Import</a>	<a href="#">Detail</a>		MDN		Johna		Smit-Maiden
	<a href="#">Carry ID</a>	<a href="#">Detail</a>	CCCM0000	PRI		John		Smith
	<a href="#">Carry ID</a>	<a href="#">Detail</a>	CCCM0001	PRI	01/01/2006	John	W.	Smith
	<a href="#">Carry ID</a>	<a href="#">Detail</a>	CCCM0001	PRF	01/01/2006	JohnPRF	W.	SmithPRF
	<a href="#">Carry ID</a>	<a href="#">Detail</a>	CCCM0002	PRF		Johnattan	Middle	Smitzerland

Example of the Search Results Page

## Affiliations

Institutions need to know all the “relationships” or “affiliations” an individual or organization has with them. Is this person a student? Undergraduate or Graduate? Are they also an employee? Maybe they are also an alumni or donor. The better the institution understands the complete picture of relationships a person has with the institution over time, the better and more precise communications and services the institution can provide. Knowing the relationship an individual has with your institution should help you provide:

- Enhanced personal interactions
- More accurate information
- Timely and appropriate access and privileges
- Enhanced communications

At first glance, the basic roles or affiliations of student, employee, alumni, applicant, instructor, etc. are easy to identify. On closer scrutiny however, we find that many institutions have unique parameters that determine exactly when a person is assigned or is removed from a particular role. Therefore, Campus Solutions Feature Pack 1 is providing institutions an extensible framework to track affiliations supporting:

- User-defined definitions of affiliations
- Ability to track all the relationships of an individual in near real-time
- User-Defined rules for “Activating” and “Inactivating” affiliations
- Ability to establish hierarchies within the affiliations (e.g. Student/Undergrad/Engineering)
- Ability to react when changes are made to data in the system

Because Affiliations in Campus Solutions 9.0 Feature Pack 1 are delivered on a flexible, extensible and scalable framework, institutions have many choices in how they want to set up Affiliations to meet the unique needs of their institution and its constituents—even in multi-institutional environments with different requirements by institution or campus. Below are the high-level categories where institutions can configure the set up for Affiliations. It is important to note that you can assign or remove Affiliations manually, in batch or near real-time, depending on the situation.

**Defining Affiliations.** Here the institution can define affiliation codes by organization and effective date, set up for automatic or manual control, establish hierarchies, and define the Application Class which determines the logic for setting or not setting an affiliation for an individual. Oracle is providing Application Class templates in Feature Pack 1 for Alumni and Recruiter roles.

**Defining Triggers.** The institution can define their own triggers (i.e. events such as graduation) to control changes to affiliations. Institutions have complete control in defining these triggers to meet their unique business processes.

**Ranking Affiliations.** This functionality allows users to rank hierarchies for all affiliations. Institutions are able to rank affiliations based on their business rules. Also, institutions can use the ranking control to establish primary affiliations according to their own logic.

**Institution** PSUNV PeopleSoft University

	Affiliation Code	Description	*Affiliation Ranking	
1	STDNT_TMPL	Student for PSUNV	01000	+
2	STGRD_TMPL	Graduate Student of PSUNV	01100	+
3	STUGD_TMPL	Undergrad Student for PSUNV	01200	+
4	STFA_TMPL	Fine Arts Undergraduate Student of PSUNV	01210	+
5	APPL_TMPL	Applicant for PSUNV	02000	+
6	APGRD_TMPL	Graduate Applicant of PSUNV	02100	+
7	APUGD_TMPL	Undergrad Applicant for PSUNV	02200	+
8	ALUMN_TMPL	Alumni for PSUNV	03000	+
9	RECTR_TMPL		0410	+
10	INSTR_TMPL		0420	+

#### Sample Affiliations Ranking

**Assigning Affiliations.** This functionality can be a very powerful construct in managing service provision to your constituents. Relationships can be fluid over time, yet the information based on an affiliation is only valuable if that information is current and accurate. Institutions need an efficient way to activate and inactivate affiliations for an individual.

There are three ways in which Affiliations can be assigned and updated:

- Manually by an administrator for an individual
- Automatically by batch processing for groups of individuals
- Triggered by specific events

**Viewing Affiliations.** Oracle is delivering two views of the Affiliations data in Feature Pack 1:

- Tabular view which shows all the Affiliations assigned to an individual in a grid format.
- Hierarchical view, providing a tree structure where you can click on any node of the tree and details about that Affiliation will appear in a pop-up window.

Also delivered is an icon for Affiliations that will show on all pages that are keyed by an individual's ID (EMPLID in PeopleSoft) in Campus Solutions.

## RELATED PRODUCTS AND SERVICES FOR HIGHER EDUCATION

Oracle is the leading vendor of application and technology solutions that meet the unique requirements of higher education. Oracle's ongoing commitment to higher education and the partnerships it has developed with its education customers has resulted in the most complete, open, and integrated solutions available today. Furthermore, Oracle's proven leadership in how technology solutions are developed and delivered means its customers will continue to get the most value out of their Oracle investment far into the future.

### OTHER PRODUCTS

The following products for higher education are available from Oracle:

- Recruiting and Admissions
- Student Administration
- Student Administration Integration Pack (SAIP)
- Campus Self-Service
- Financial Aid and Student Financials
- Academic Advisement
- Gradebook
- Contributor Relations
- Constituent Relationship Management for Higher Education
- Campus Identity Management
- Enterprise Portal
- Beehive Collaboration Tools
- Content Management
- Planning & Budgeting
- Oracle OnDemand

## Conclusion

The enhancements included in the first feature pack under the new Continuous Delivery Model for Campus Solutions illustrate Oracle's commitment to bring value to our higher education customers. Oracle's incremental approach to deliver technology enhancements and new features and functionality means that IT can deliver value to their institution's functional departments sooner and with less disruption.

The enhancements in Campus Solutions 9.0 Feature Pack 1 will improve the ability of colleges and universities to communicate and interact with all constituents because the information about individuals and groups can be captured, integrated, and more consistently maintained. More enhancements to features and functionality regarding constituent management are planned for future feature packs, showing Oracle's commitment and leadership in the higher education industry.

## Contact Us

For more information about Campus Solution, please visit [www.oracle.com/industries/highereducation](http://www.oracle.com/industries/highereducation) or call +1.800.ORACLE1



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