Working with Student Activity Guides

Understanding Student Activity Guides

The PeopleTools Activity Guides feature is the basis of the Activity Guides feature in Campus Solutions. The Student Activity Guides feature enables you to define guided tasks for students to complete. Students are presented with a list of action items that need to be completed to finish a task.

The Student Activity Guides provide sample activity guide templates that incorporate existing student self-service pages and some configurable pages. This enables institutions to assign templates to students as tasks, which students can complete using the *Student Task WorkCenter* in classic self service or the Tasks tile in Fluid self service. In addition to the delivered templates and the Student Task WorkCenter page, Campus Solutions provides components to enable the configuration and assignment of these tasks. You can access these configuration and assignment components from the *Task Management WorkCenter*.

Refer to the *PeopleTools: Portal Technology* documentation for understanding the terms: *activity guide template*, *activity guide instance*, *action item*, *activity guide pagelets* and *context data*; and for an overview of how to develop and deploy activity guides.

See the product documentation for *PeopleTools: Portal Technology*, Understanding activity guides

The PeopleTools Activity Guide feature enables you to create a multi-step guided task. You create this task by defining an *activity guide template* and plugging-in existing pages (either delivered or customized) as *action items* in a specified sequence.

Each action item can have a start date/time and due date/time and has a status value (for example, *Assigned*, *In Progress*, and *Completed*). You can define:

- The dependencies between action items, for example, action item A must be completed before a student starts action item B.
- Whether an action item is required or optional, that is, whether the action item must be completed in order to complete the task.
- The processing that the system should perform when a student completes an action item.

For more information on action items refer to the discussion about using activity guides in the *PeopleTools: Applications User's Guide*.

See *PeopleTools: Applications User's Guide*, Using activity guides

You can define the *context data* for a template. The *context data key fields* are the unique key fields used to identify an activity guide instance (task). This can be as simple as just an EMPLID and Institution, or can include multiple fields (for example, Institution, EMPLID, Career, Career Number, Term and so on). Context data key fields must always include the two fields: Institution and EMPLID. The system populates the context data key fields when the template is assigned – manually or through the Assign Tasks process – to the student as an activity guide instance. In other words, an activity guide instance is the task that the student should complete.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Important! Throughout this documentation, the terms *activity guide instance*, *instance* and *task* are synonymous and are used interchangeably.

Each task has an overall status (*In Progress*, *Completed* or *Cancelled*), a Start and Due Date, and an Active flag. If the Start and Due Date are not defined for the task then, the start date of the first action item is the task start date and the due date of the last action item is the task due date.

Scenarios

Student Activity Guides can be useful in a number of procedural scenarios, for example, registration requirements for new and continuing students, international students and research students.

Here is a scenario:

An institution wants students to check and update their address and emergency contact information at the beginning of each term. The students are required to complete this task before they are allowed to enroll. Service indicators are assigned to students to prevent them from enrolling.

Jane, who is a student at this institution, signs into self service. She clicks the Verify Contact Details link in the To Do List to complete the task:

1. A page appears with the details of her current home and mailing addresses. She has the option to edit both addresses. She saves the changes and clicks Next.
2. A page appears with the details of her emergency contacts. She can edit the contacts. She saves the changes and clicks Next. When she clicks Next, a completion page appears and she clicks the Finish or Submit button. Once she has completed the task, the service indicator assigned to Jane is automatically removed and she is allowed to complete her class enrollments for the term.

Here is another scenario:

An institution wants its students to complete a Registration task. The institution has provided a pagelet on a student dashboard page to display a registration link and information about this task and its deadline.

Emma, who is a student at this institution, clicks the registration link to complete this four-step task:

1. A page appears where Emma can review her career details such as program, plan and campus. The page informs her that if any of the details are incorrect, she must contact the administrator. She clicks the Next button after reviewing this data.
2. A page appears with the details of her current home and mailing addresses. She has the option to edit both addresses. She saves the changes and clicks Next.
3. A page appears with the details of her emergency contacts. She can edit the contacts. She saves the changes and clicks Next.
4. A page displays the data protection statement. She confirms that she has read the the statement, and clicks Next.

You can use the Student Activity Guides feature to create such tasks. For example, for the scenario of Registration task, create a *Registration* activity guide template and configure each step as an action item. With each action item, associate a self-service page that the student needs to complete.

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

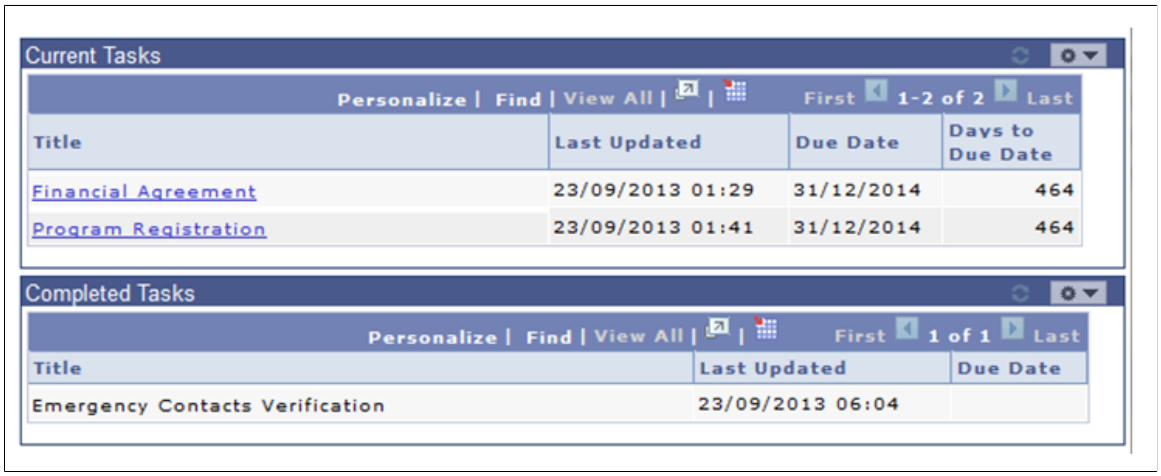
Understanding How Students Access Tasks in Classic Self Service

Campus Solutions delivers pagelets to give students access to tasks through a dashboard.

Note: For the Current Tasks and Completed Tasks pagelets, Activity guides optimized for the Fluid interface are not displayed.

Image: Delivered pagelets (Current Tasks and Completed Tasks)

This example illustrates the delivered Current Tasks and Completed Tasks pagelets.



Current Tasks: The student can view and access their open active tasks (based on matching EMPLID in context data) in the Current Tasks pagelet. The pagelet defaults to expanded and displays the following values for each task:

- Title (displayed as a link to access the task in the Student Task WorkCenter).
- Last Updated.
- Due Date (if defined for the final action item).
- Days to Due Date (only displayed if Due Date is defined).

The student can click the Title link to access the Student Task WorkCenter, where he or she can complete the task.

The pagelet displays only those tasks that satisfy all of the following conditions:

- Status = *In Progress*
- Active = *Y*
- The Start Date of the first action item is not after the current date

The pagelet does not display tasks with status of *Completed* or *Cancelled*, or with Active = *N*, or with Start Date in the future.

Tasks are ordered by due date ascending, that is earliest Due Date first, and if due date is same then the ordering is done alphabetically by title. Tasks without a due date are displayed last in alphabetical title order.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

If there are no pending tasks, the pagelet displays a message: “No current tasks”. Use the PeopleTools Message Catalog component, if you want to change this message (Message Set = 14175, Nbr = 5).

Completed Tasks: The student can view but cannot access their completed tasks in the Completed Tasks pagelet. The pagelet displays only those tasks that have an instance status = *Complete*. Tasks with status of *In Progress* or *Cancelled* are not displayed.

Note: This pagelet does not consider the Active flag. Completed tasks are displayed whether or not the Active flag is set.

Accessing Student Task WorkCenter from the Student Center page and the Personal Data Summary page:

Note that students can also access the Student Task WorkCenter from the To Do List section in the Student Center (required setup must be done in the Student Center Options page).

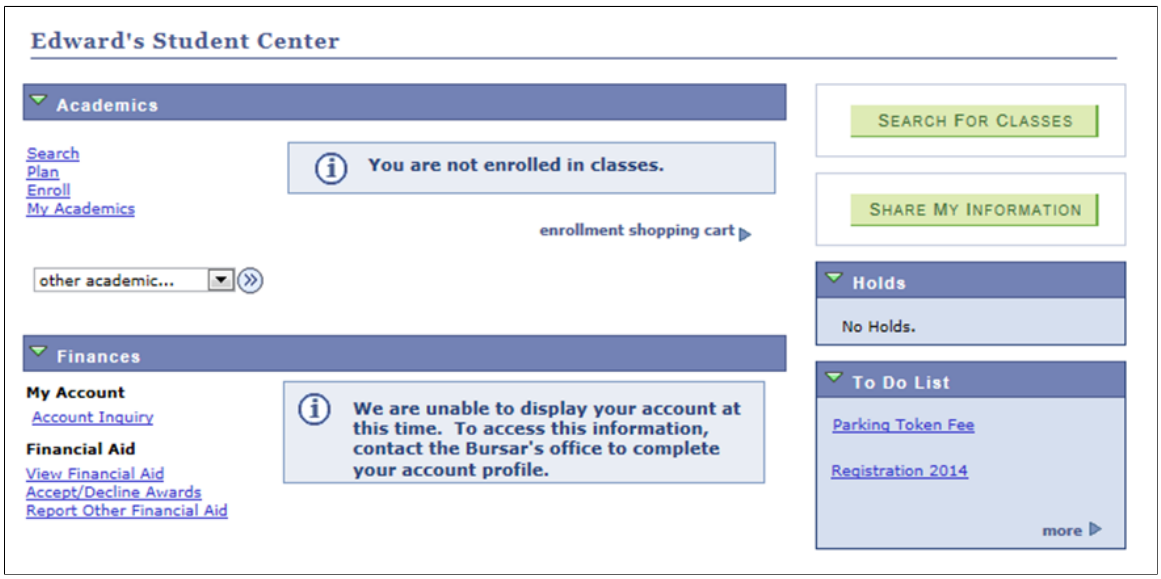
See "Using Student Task WorkCenter" (PeopleSoft Campus Solutions 9.2: Self Service)

See "Using Self-Service Student Center" (PeopleSoft Campus Solutions 9.2: Self Service)

See "Setting Up a Self-Service Student Center" (PeopleSoft Campus Solutions 9.2: Self Service)

Image: Example of a To Do List in Student Center

This image illustrates an example of a To Do List in Student Center.

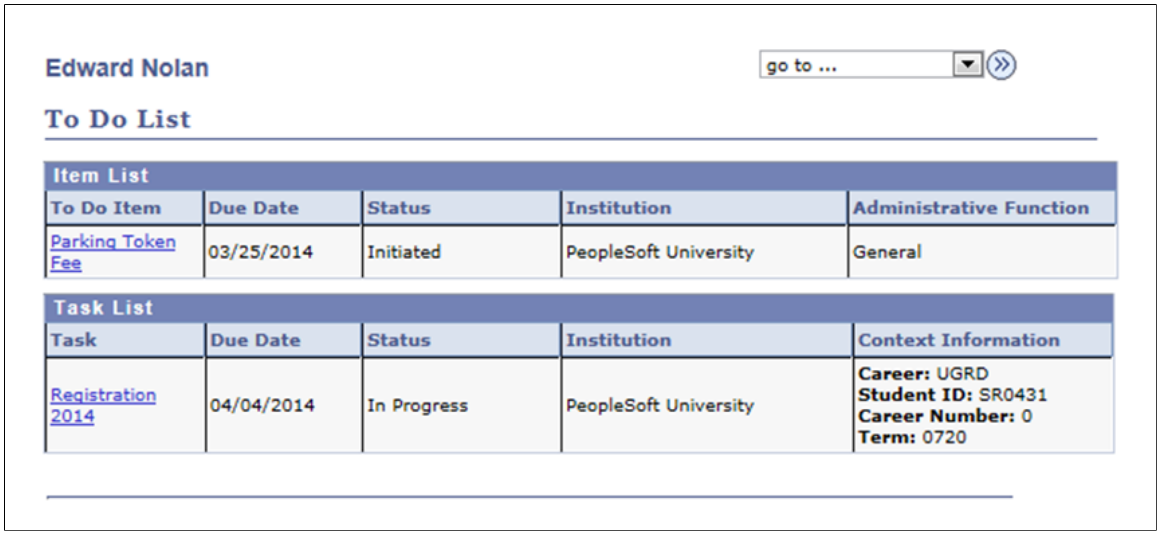


For example, a student can click the Registration 2014 link in the To Do List section of Student Center to access the Student Task WorkCenter. The student can click the More link in the To Do List section to access the To Do List page where the student can view more information about all the pending tasks and access the Student Task WorkCenter for completing a pending task.

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Example of a To Do List page

This image illustrates an example of a To Do List page.



For more information on the To Do List page:

See "Using Self-Service Checklists Data" (PeopleSoft Campus Solutions 9.2: Self Service)

The To Do List section is also available on the Personal Data Summary self-service page. For more information:

See "Displaying and Accessing Self-Service Personal Data" (PeopleSoft Campus Solutions 9.2: Self Service)

Note that the Campus Community - Student Services Center component provides the ability for an administrator to see what a specific individual, such as a student, sees on Student Center self-service. For more information:

See Viewing an Individual's Student Center Information

In addition to access through the Current Tasks pagelet and through the Student Center and Personal Data Summary page, a link to the Student Task WorkCenter for the task can be embedded in email notifications. The system can send these notifications to the student when the task is assigned.

For more information about notifications:

See Configuring Tasks

For more information about administering dashboard pages:

See the product documentation for *PeopleTools: Portal Technology*, Administering homepages, dashboard pages and pagelets

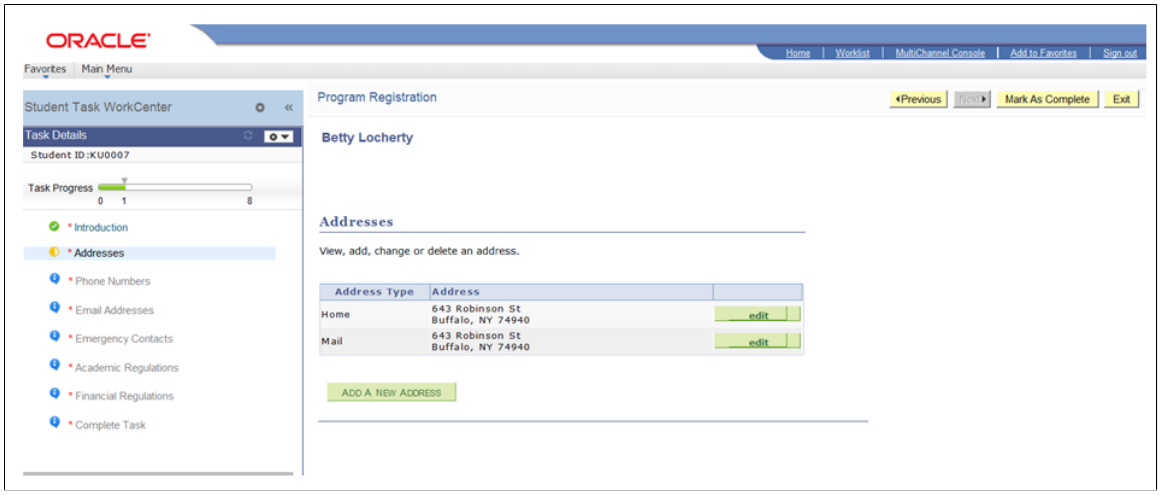
Student Task WorkCenter

A student uses the Student Task WorkCenter to complete the task that the institution has assigned to the student:

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Example of the delivered Student Task WorkCenter page

This image illustrates an example of the delivered Student Task WorkCenter page.



The left hand pane icons indicate the action items and their statuses.

See *PeopleTools: Applications User's Guide*, Activity guide icons and controls

As shown in the example, the activity guide instance is a task that the institution assigns to a student and each action item is a step that the student performs.

Campus Solutions delivers the launch (introduction) action item page, agreement (academic regulations and financial regulations) action item pages and the Complete (complete task) action item page.

To review the configuration of workcenter pages:

See the product documentation for *PeopleTools: Portal Technology*, Creating and configuring WorkCenter pages

Understanding How Students Access Tasks in Fluid Self Service

Update for Fluid.

Students can use the Tasks tile on their Homepage to view their To Do list and Holds if any; and complete their tasks with the help of Student Activity Guides. Using PeopleSoft Fluid User Interface, the To Do list allows students to view relevant information and complete tasks through their mobile devices.

See "Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals) for more details.

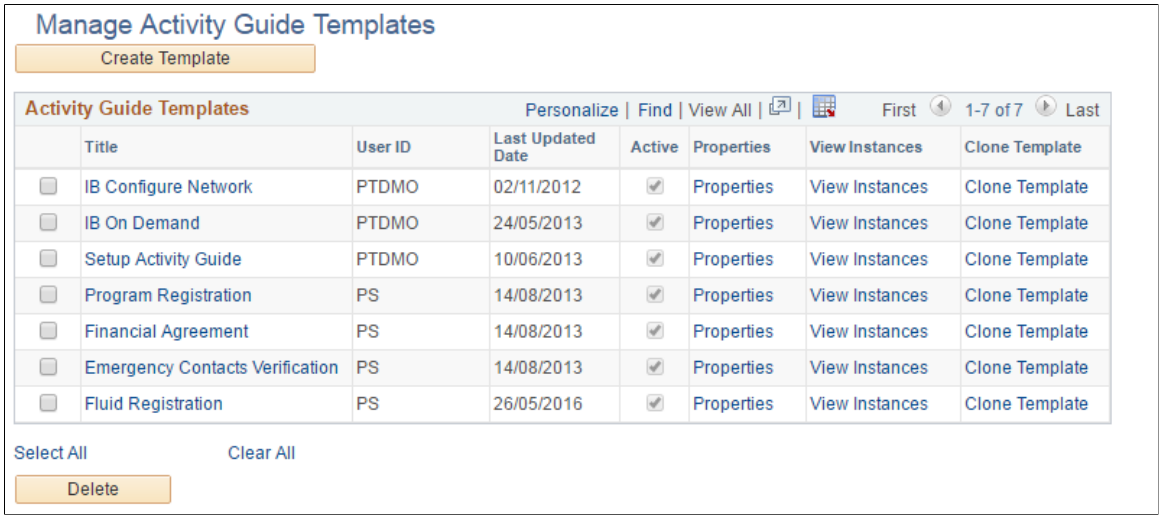
Setting Up Activity Guide Templates

To set up the Student Activity Guides templates, use the PeopleTools - Manage Activity Guide Templates page. You can access this page from the PeopleTools menu or from the Task Management WorkCenter.

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Example of the PeopleTools - Manage Activity Guide Templates page

This image illustrates an example of the PeopleTools - Manage Activity Guide Templates page.



Use the Manage Activity Guide Templates page to review and amend the delivered templates or to create new templates depending on the needs of your institution.

See the product documentation for *PeopleTools: Portal Technology*, Managing activity guide templates

Campus Solutions delivers example templates for:

- Fluid Registration
- Program Registration
- Emergency Contacts Verification
- Financial Agreement

These four templates illustrate the capabilities of activity guides to support guided tasks. The Fluid Registration template is optimized for use with Fluid action items. The other templates are non-optimized and used for classic action items. The following subsections describe each of the delivered templates.

Fluid Registration Template

This delivered template includes the existing Launch, Agreement and Complete Task pages with the additional setup features required for the PeopleSoft Fluid User Interface. The defined tasks can be completed using both mobile and desktop devices.

This delivered template is associated with the following context data fields:

- Institution
- ID
- Career

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

- Career Number
- Term

The template consists of the following action items:

- Launch (this is an optional item)
- Contact Details
- Addresses
- Emergency Contacts
- Agreement 1
- Agreement 2
- Complete Task with a Submit button

Other personal data pages not included in the Fluid Registration template but available for use as action items in activity guides on the Fluid User Interface:

- Personal Details
- Biographic Details
- Privacy Restrictions
- IPEDS Ethnicity
- Ethnic Background
- Campus Preferences

For more details, see Configuring Tasks.

Program Registration Template

This delivered template is associated with the following context data fields:

- EMPLID (student)
- Institution
- Career
- Career number
- Term

You may decide that the student can enroll for the term only after he or she completes the program registration task.

The template consists of the following action items:

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

- Introduction (launch) page: Configurable using the Task Configuration component.
- Addresses self-service page: Existing self-service page.
- Email Addresses page: Existing self-service updatable page.
- Phone Numbers page: Existing self-service updatable page.
- Emergency Contacts page: Existing self-service updatable page.
- Academic Regulations (Agreement page 1): Configurable using the Task Configuration and Page Definitions components.
- Financial Regulations (Agreement page 2): Configurable using the Task Configuration and Page Definitions components.
- Complete Task page: Configurable using the Task Configuration component.

Note: When defining a new non-optimized template, you must include a Complete Task page as the final action item in the template to allow the associated processing to be undertaken (including the sending of notifications) when a student completes a task.

Important! The terms *action item* and *step* in a task are synonymous and are used interchangeably in this documentation.

For more information on the Task Configuration and Page Definitions components:

See Configuring Tasks

The Student Task WorkCenter displays these pages to students as part of a task.

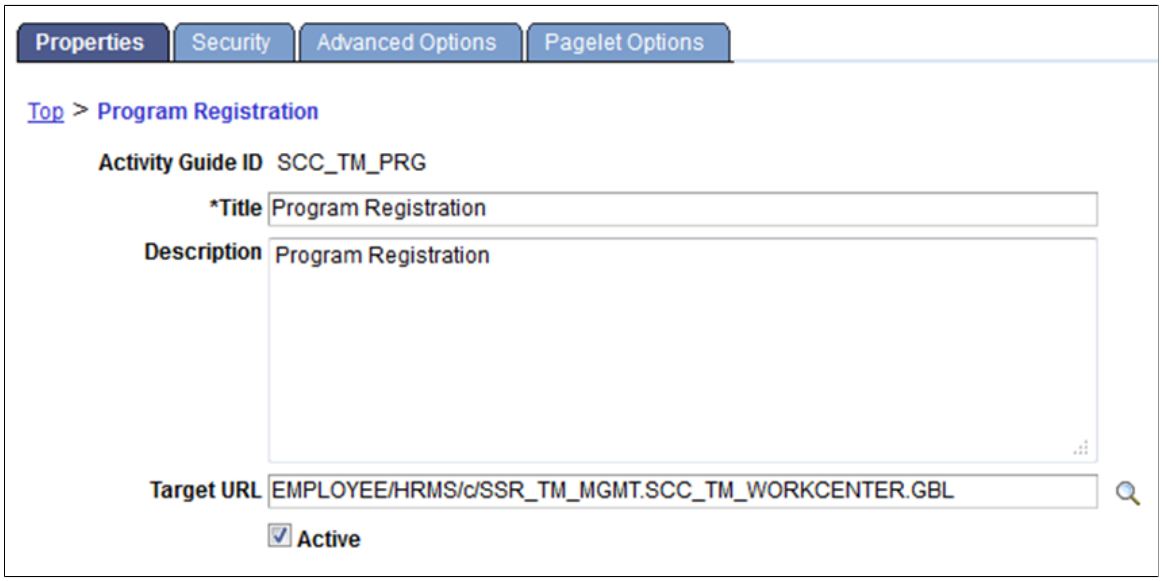
Activity Guide Template Properties

Click the Properties link for the Program Registration template on the Manage Activity Guide Templates page to access the activity guide template properties.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: PeopleTools Activity Guide Template - Properties page

This image illustrates an example of the PeopleTools Activity Guide Template - Properties page.



Use this page to review or modify the template properties, security privileges, advanced options (such as modifying context data fields) and pagelet options.

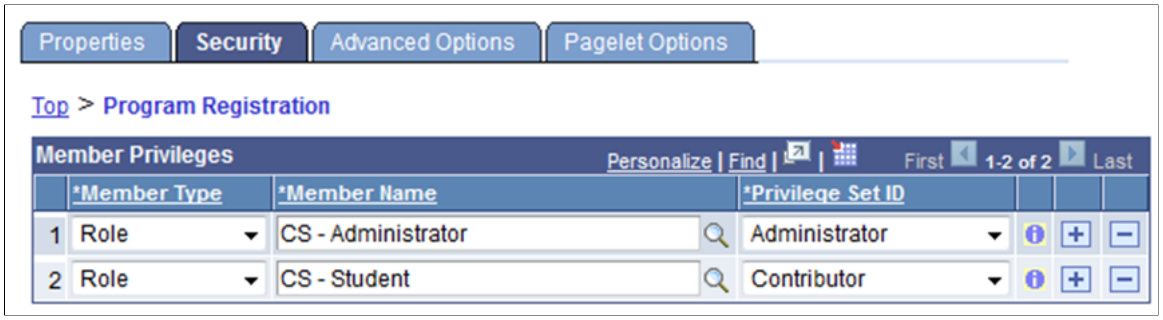
Note: On this page, the Title and Description fields can be edited as required. However, the Target URL should be set to the value as shown in the preceding graphic of the Properties page to ensure that the task is available in the Student Task WorkCenter. The system displays the Title value to the student in the Student Task WorkCenter. The Description field can be used for a more detailed description of the task. This description is used for internal processes only and is not displayed to the student.

See the product documentation for *PeopleTools: Portal Technology*, Developing and managing activity guide templates

Access the Security page.

Image: PeopleTools Activity Guide Template – Security page

This image illustrates an example of the PeopleTools Activity Guide Template – Security page.



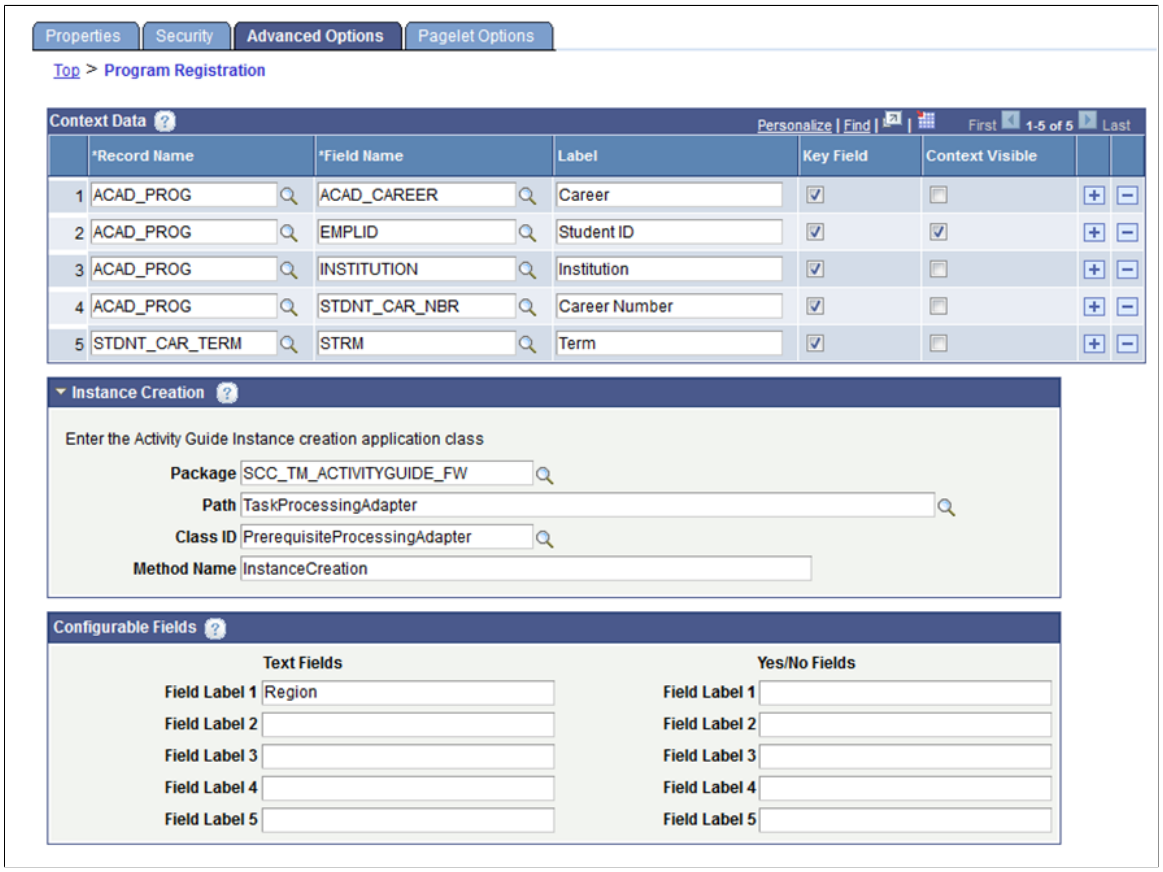
Activity Guide Template - Security page: At least one row is required with Privilege Set ID = *Administrator* if you want to add or modify the roles in the delivered template. In addition, the role of the students who complete the task should be defined with Privilege Set ID = *Contributor*.

Access the Advanced Options page.

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: PeopleTools Activity Guide Template – Advanced Options page

This image illustrates an example of the PeopleTools Activity Guide Template – Advanced Options page.



Activity Guide Template - Advanced Options page:

For Context Data, INSTITUTION and EMPLID must always be included as Key Fields.

The Context Visible check box determines whether the data is visible to the student in the Student Task WorkCenter and in the Task List region of the To Do List page. The Label value is used when displaying context data fields to students.

For more information on the To Do List page:

See "Using Self-Service Checklists Data" (PeopleSoft Campus Solutions 9.2: Self Service)

Note that InstanceCreation is the delivered method that is used by all of the delivered templates. If you are creating your own template, you can reuse the details shown in the Instance Creation region of the delivered template. To ensure that all the delivered processing is triggered when an instance is created, the delivered application class SCC_TM_ACTIVITYGUIDE_FW should be used or a new application class should be created that extends this class and contains any required additional custom logic

---

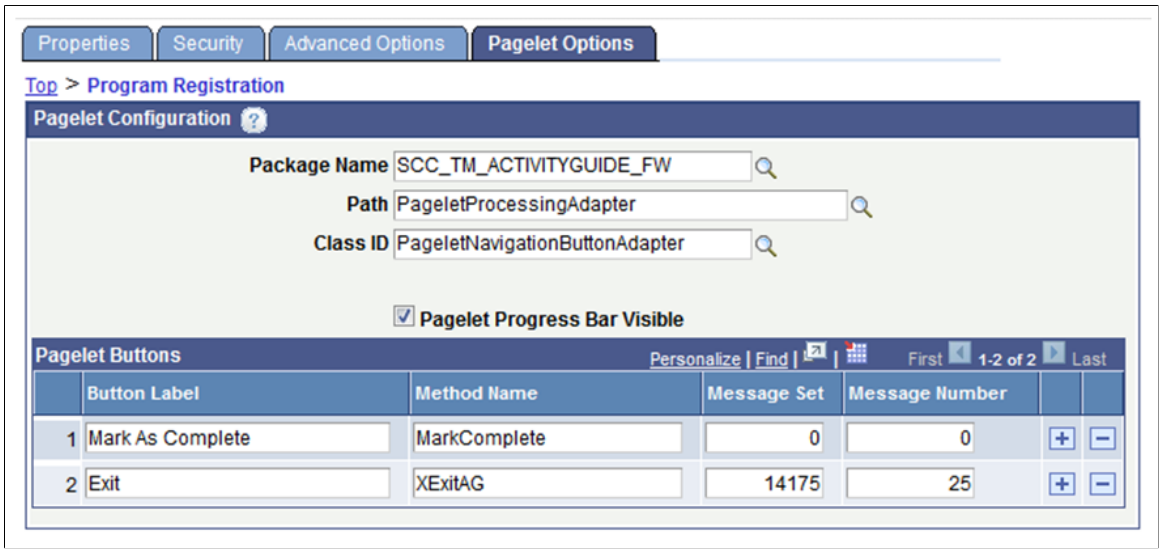
Note: On the Configurable Fields section (Text Fields column) of the Activity Guide Template - Advanced Options page, ensure that you do not modify the value *Region* in the Field Label 1 field. If you choose to add values to other field labels, use Field Label 2 onwards. The system uses the *Region* value when the delivered Agreement pages are defined as action items. The Region value must be entered for templates that are using Agreement pages.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Access the Pagelet Options page.

Image: PeopleTools Activity Guide Template – Pagelet Options page

This image illustrates an example of the PeopleTools Activity Guide Template – Pagelet Options page.



Use the Activity Guide Template - Pagelet Options page to add custom navigation frame buttons to the Student Task WorkCenter page (refer to the Mark As Complete and Exit buttons on the graphic of the Student Task WorkCenter page in the preceding "Student Task WorkCenter" subsection of the "Understanding Student Activity Guides" section). The Class ID is the application class containing the methods to be invoked to create custom navigation frame buttons.

See Understanding Student Activity Guides

Activity Guide Template - Pagelet Options page: The Mark As Complete and Exit buttons are delivered in each of the example templates.

The Mark As Complete button enables a student to set the action item (step) as *completed* for pages where none of the data is being updated. For example, on the address page if all the displayed data is accurate, the student can click Mark As Complete to indicate that no updates are required. The button is labeled as *Mark as Read* on launch pages that are read-only. For agreement pages, the button label is not displayed and does not update the action item status; when the student clicks the button, the system displays a message to indicate that Save must be clicked on the page to save the Accept or Decline decision.

Note: Mark As Complete is a special custom navigation button and the method must be named MarkComplete.

The Exit button enables a student to leave the task at any step and return later to complete it. If the student clicks this button a warning message is displayed: *Updates will only be saved for sections that are marked as Complete. Do you still want to exit?* When the OK button is clicked:

- If access was from one of the following pages the student returns to that page:
  - Student Center
  - Personal Data Summary

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

- To Do List

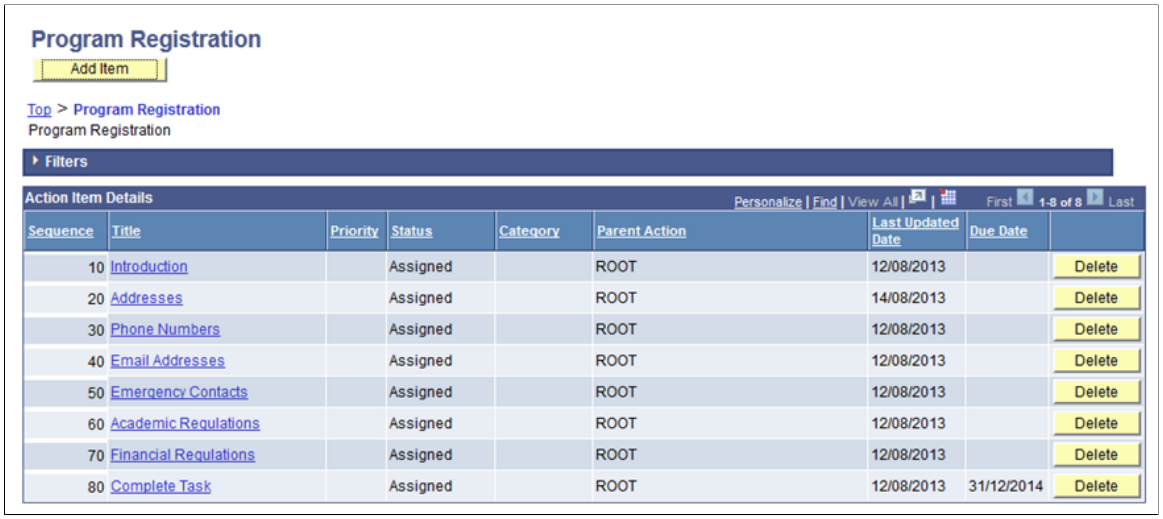
- If access was from the Current Tasks pagelet, the student returns there.
- If access was from a notification link (either embedded in an email or from the Notifications Center), and a Default Exit navigation page has been defined in Task Configuration component, the student navigates to that page.
- If access was from an email link and no Default Exit navigation page is defined, the student is logged out.
- If access was from the Notification Center and no Default Exit navigation page is defined, the student stays on the completed page and can close the browser tab or window and return to the Notification Center in the previous tab or window.

Activity Guide Template – Action Items

Click the title link for Program Registration on the Manage Activity Guide Templates page to access the Action Items page.

Image: Activity Guide Template – Action Items page

This image illustrates an example of the Activity Guide Template – Action Items page.



Sequence	Title	Priority	Status	Category	Parent Action	Last Updated Date	Due Date	
10	Introduction		Assigned		ROOT	12/08/2013		Delete
20	Addresses		Assigned		ROOT	14/08/2013		Delete
30	Phone Numbers		Assigned		ROOT	12/08/2013		Delete
40	Email Addresses		Assigned		ROOT	12/08/2013		Delete
50	Emergency Contacts		Assigned		ROOT	12/08/2013		Delete
60	Academic Regulations		Assigned		ROOT	12/08/2013		Delete
70	Financial Regulations		Assigned		ROOT	12/08/2013		Delete
80	Complete Task		Assigned		ROOT	12/08/2013	31/12/2014	Delete

Use this page to view or configure the action items for the template.

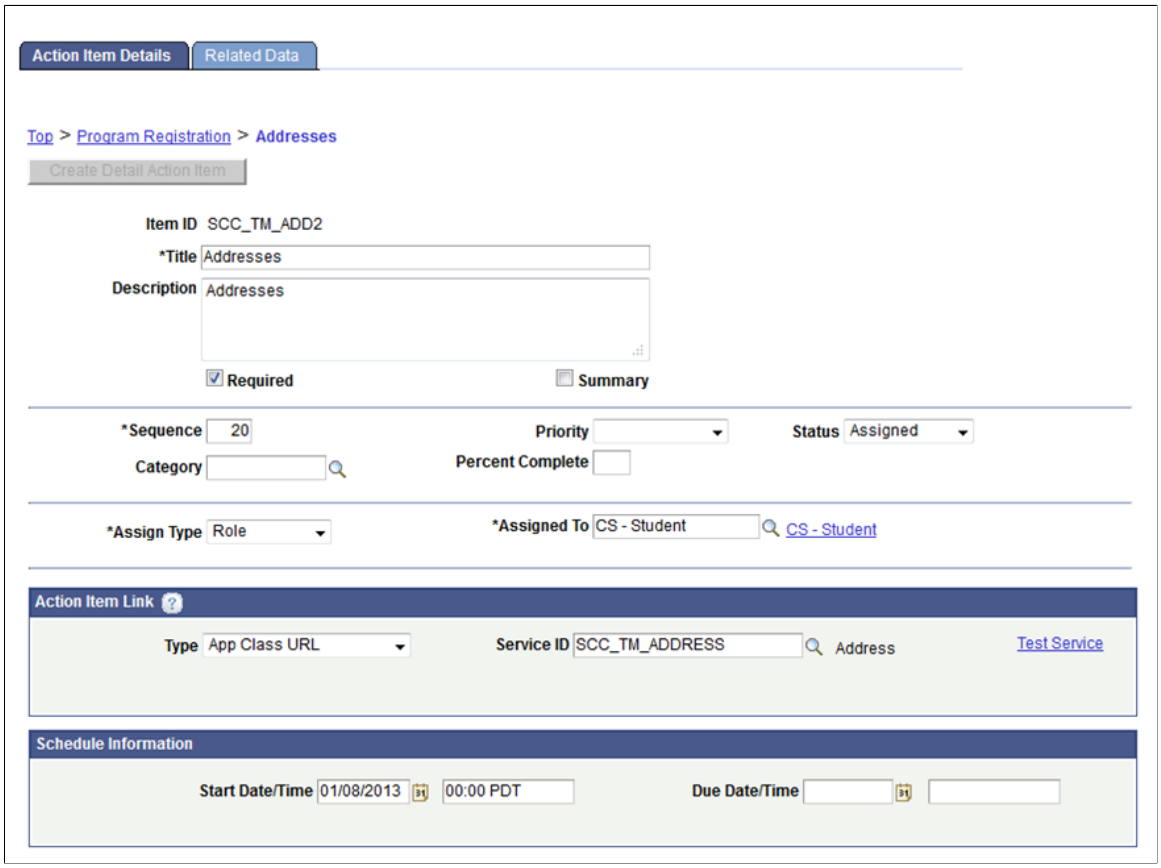
See the product documentation for *PeopleTools: Portal Technology*, Creating and maintaining action items

Click a title link to access the Action Item Details page for a particular action item.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Action Item - Action Item Details page

This image illustrates an example of the Action Item - Action Item Details page.



On the Action Item Details page, each of the action items is delivered with the following settings:

- Required = *Y*
- Dependencies are set up so that the student must complete each action item before moving on to the next one.
- The system uses the start date of the Introduction action item as the *task start date* and uses the due date of the Complete Task action item as the *task due date*.

The action item link determines which page is opened in the Student Task WorkCenter for the action item. In the preceding graphic of Action Item Details page, this is set to App Class URL with Service ID of the Related Content Service for the Addresses page.

The related content services are delivered for the four self-service pages: Addresses, Phone Numbers, Email Addresses and Emergency Contacts, as well as Launch, Agreement, and Complete. These related content services enable the system to display the pages as action items (without displaying the navigation path, for example, *Self Service, Campus Personal Information, Addresses, Addresses*) when the student accesses these pages from the Student Task WorkCenter.

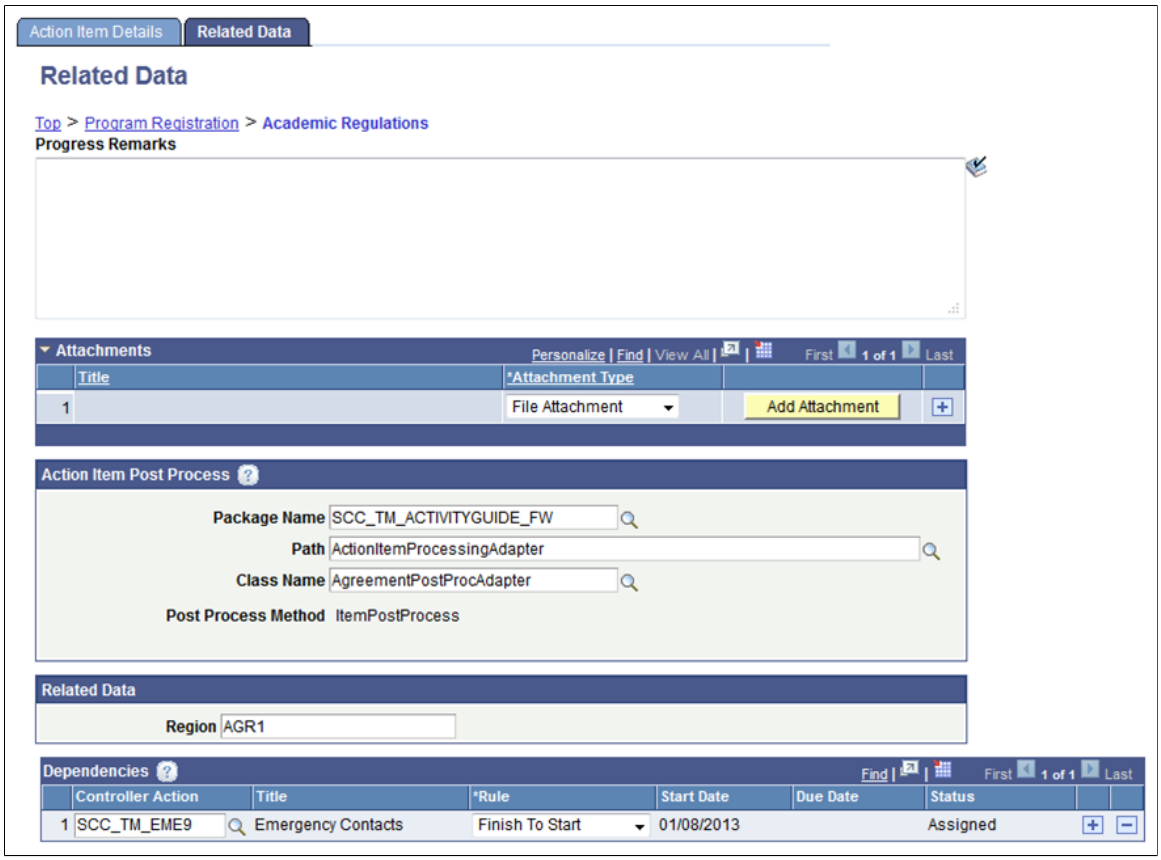
The Start Date/Time field is required and defaults to system date. The field must be set to a date when the action item is to be accessible to the student. For example, if Start Date/Time = August 2, 2013, then the student can access this action item only on or after August 2, 2013. The student cannot access the action item on August 1, 2013. The start date for each action item is typically set to the same value as the launch page in the template.

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Access the Related Data page.

Image: Action Item - Related Data page

This image illustrates an example of the Action Item - Related Data page.



Note: Action Item - Related Data page: In the Region field of the Related Data section, the value - *AGR1* (for the first agreement action item) or *AGR2* (for a second agreement action item) - must exist for the agreement action items (for example, Academic Regulations and Financial Regulations).

The delivered ItemPostProcess method executes when the student completes the action item (for example, in the preceding graphic of Related Data page, the ItemPostProcess method executes when the student completes the *Academic Regulations* step). To ensure that all the delivered processing is triggered when an instance is completed, the delivered application class SCC_TM_ACTIVITYGUIDE_FW:AgreementPostProcessingAdapter should be used for agreement pages and the delivered application class SCC_TM_ACTIVITYGUIDE_FW:ActionItemPostProcAdapter for other pages or a new application class should be created that extends the SCC_TM_ACTIVITYGUIDE_FW package and contains any required additional custom logic.

On the Related Data page, dependencies are set up between the action items. For example, the preceding graphic of Related Data page shows that the student must complete the Emergency Contacts action item before he or she can access the Academic Regulations action item.

Related Content Services

In order to add other system or custom pages to the template as action items, a related content service must be defined that can then be used as the Action Item Link Service ID.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

To define a related content service, access the Define Related Content Service page (Peopletools >Portal >Related Content Services >Define Related Content Service).

Individual application classes are provided for the delivered related content service definitions. These individual application classes contain the pre-processing logic that is followed before the page is opened. These classes can be customized to add further pre-processing logic.

See the product documentation for *PeopleTools: Portal Technology*, Developing and configuring related content services

Emergency Contacts Verification Template

This delivered template is associated with the following context data fields:

- EMPLID (student)
- Institution
- Term

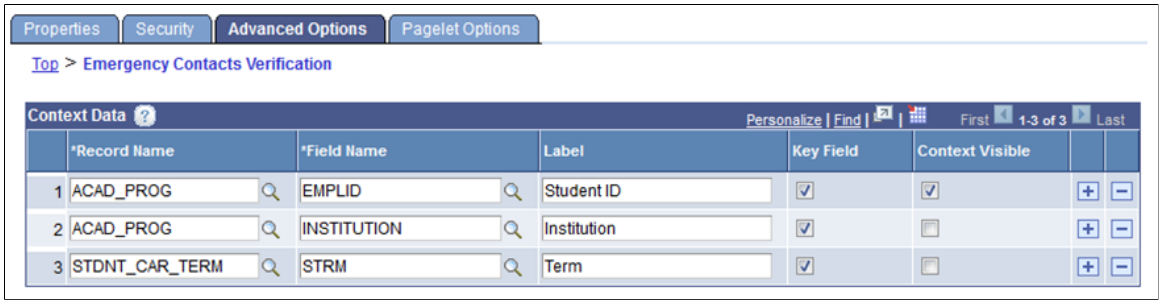
The template consists of the following action items:

- Introduction (launch) page: Configurable using the Task Configuration component.
- Emergency Contacts page: Existing self-service page.
- Complete Task page: Configurable using the Task Configuration component.

Access the Advanced Options page to review this template's context data.

Image: Context Data for the Emergency Contacts Verification Template

This example illustrates the context data for the Emergency Contacts Verification template.



The rest of the settings and rules of this template are similar to the Program Registration template.

Financial Agreement Template

This delivered template is associated with the following context data fields:

- EMPLID (student)
- Institution
- Career

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

- Career number

You may decide that the student can enroll only after he or she agrees to the financial agreement.

The template consists of the following action items:

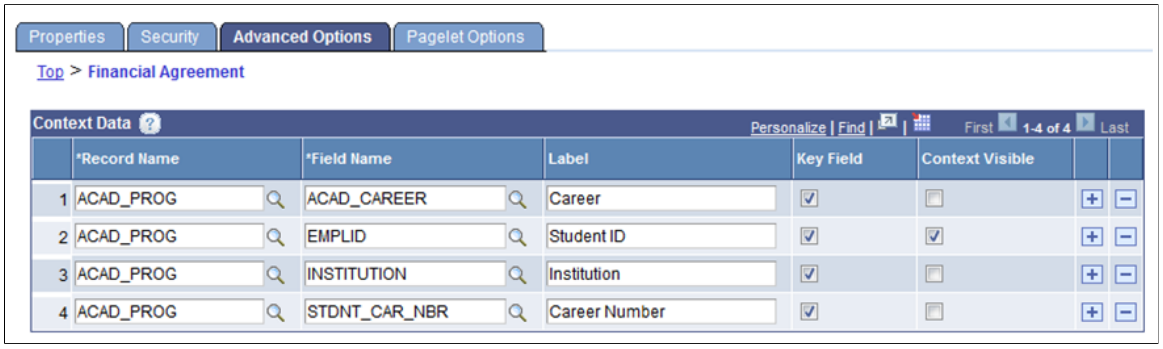
- Agreement page: Configurable using the Task Configuration component.
- Complete Task page: Configurable using the Task Configuration component.

This template is an example of a task without the optional Launch page.

Access the Advanced Options page to review this template's context data.

Image: Context Data for the Financial Agreement Template

This example illustrates the context data for the Financial Agreement template.



The rest of the settings and rules of this template are similar to the Program Registration template.

Configuring Tasks

Use the Task Configuration component (SCC_TM_CONFIG) to define additional properties for a template other than those defined in the PeopleTools Manage Activity Guide Templates component. This component is applicable to both the Classic User Interface and the Fluid User Interface.

Note: A configuration record is required in the Task Configuration component before a task can be assigned to students.

This section discusses how to:

- Define task properties.
- Define launch page properties.
- Define agreement pages.
- Define agreement page properties.
- Defining complete page properties.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Pages Used to Configure Tasks

Page Name	*Definition Name*	*Navigation*	*Usage*
Task Configuration	SCC_TM_CONFIG	Campus Community >Task Management WorkCenter >Task Configuration	Required. Define properties of the task including optional prerequisite and subsequent tasks and Notification framework parameters.
Launch	SCC_TM_CONF_LAUNCH	Campus Community >Task Management WorkCenter >Task Configuration >Launch	Optional. Define the properties of the optional launch page that can be displayed to the student as the first step (first action item) in a task. Properties that you can define include instruction text and the optional display of selected contact and career information.
Agreements	SCC_TM_CONF_AGRMNT	Campus Community >Task Management WorkCenter >Task Configuration >Agreements	Optional. Define which page definitions to use for agreement pages displayed as interim steps (interim action items) in a task.
Complete	SCC_TM_CONF_SUBMIT	Campus Community >Task Management WorkCenter >Task Configuration >Complete	Optional. Define the content and format of the final action item page of the task.
Field Setup	SCC_FIELD_SETUP	Campus Community >Task Management WorkCenter >Field Setup	View the delivered career information fields that you can display on the launch action item page. To choose which of these delivered fields the launch page should display, use the Task Configuration component's Launch page.
Page Definitions	SCC_TM_PG_DEFN	Campus Community >Task Management WorkCenter >Page Definitions	Define agreement pages for use in the Task Configuration component's Agreement page.

Defining Template Properties

Access the Task Configuration page (Campus Community >Task Management WorkCenter >Task Configuration).

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Task Configuration page (1 of 2)

This example illustrates the fields and controls on the Task Configuration page (1 of 2). You can find definitions for the fields and controls later on this page.

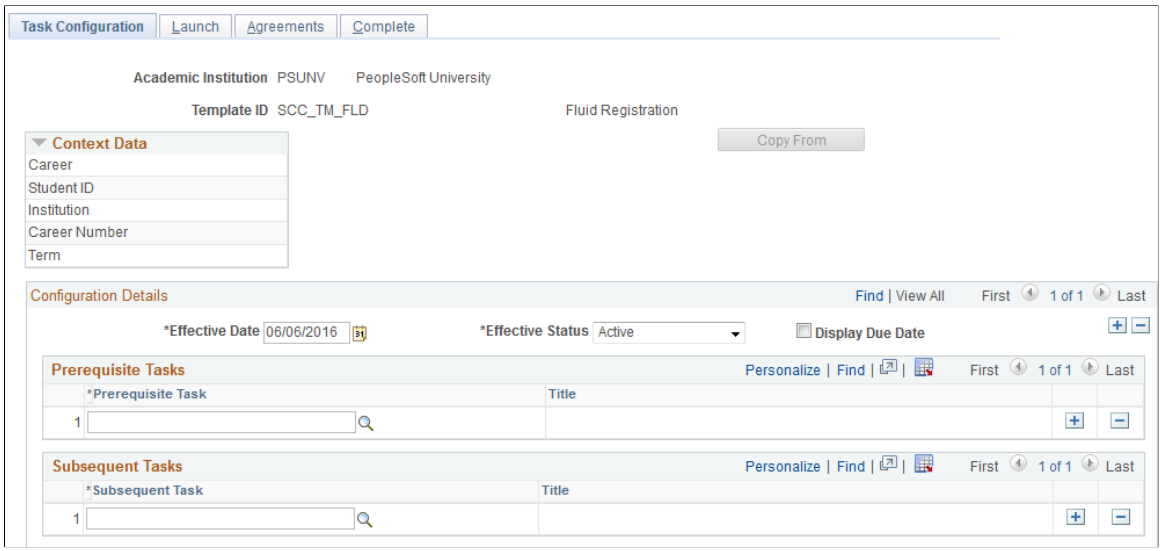
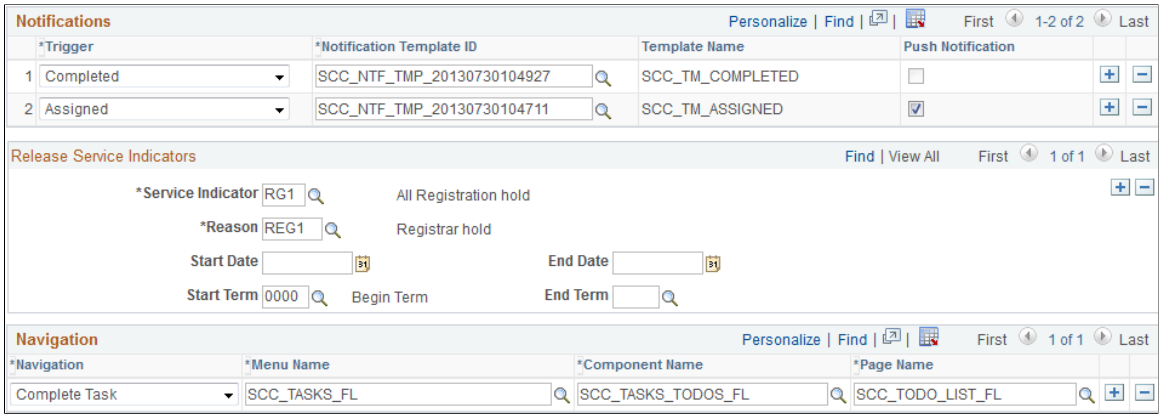


Image: Task Configuration page (2 of 2)

This example illustrates the fields and controls on the Task Configuration page (2 of 2). You can find definitions for the fields and controls later on this page.



On this page, you can create a configuration record for an institution for any active activity guide template. The page displays the context data fields that are defined for the template on the PeopleTools Activity Guide Template - Advanced Options page.

For new configuration records, use the Copy From button to copy all the details from an existing configuration record.

The system refers to the most current effective dated record on this page when the task is displayed to students.

Display Due Date

Select to display the due date on the Launch page and the Complete page. If defined for the instance, that Due Date value is displayed; otherwise the Due Date of the final action item is displayed.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Prerequisite Task

Optionally, use this region to define any prerequisite tasks that the student needs to complete before you assign this task. The system will make this check when you either manually assign this task using the Create Instance button on the Activity Guide Template - Properties page or when you use the Assign Tasks process.

Subsequent Task

Optionally, use this region to define any related tasks that the system automatically assigns when the student completes this task. For example, the preceding graphic of Task Configuration page illustrates that the Emergency Contacts Verification task is automatically assigned to the student when he or she completes the Program Registration task. Note that the current task must have the required key Context Data fields to create the subsequent task.

The Task Configuration page checks whether all the context data fields for the subsequent task exist for the current task. If any values are missing, the page displays a warning message. You can ignore the warning; however, the system does not create the subsequent task when the student completes the current task.

Notifications

Optionally, use this region to define the notifications that the system triggers when the task is assigned to a student or when the student completes a task. The system uses the Notification Framework for handling notifications.

When notifications are not sent through the Notifications Framework but instead through Push Notifications, you can optionally select a Notification Template ID to create alerts for new tasks.

Push Notification	This check box is enabled if the Trigger is set to *Assigned*. By default, Push Notifications is not selected. If selected, for optimized templates, the Assign Tasks process generates an alert when an instance is created.

Delivered with the system are the Notification Consumer ID *Task Management Notifications (SCC_NTF_CON_20130619110938)* for use with Student Activity Guides and the notification setup for example templates SCC_TM_ASSIGNED and SCC_TM_COMPLETED.

Note: The system triggers the assign notification parameter at the point when the task is assigned to the student, which can be before the start date of the task. The notification would need to include an explanation for the student that the task is not available until the start date.

See Understanding the Notifications Framework

Note

These features (Prerequisite Task, Subsequent Task and Notifications) are dependent on the delivered application class SCC_TM_ACTIVITYGUIDE_FW:TaskProcessingAdapter:PrerequisiteProcessingAdapter having been defined for Instance Creation in the Activity Guide Template definition and SCC_TM_ACTIVITYGUIDE_FW:ActionItemProcessingAdapter:ActionItemPostProcAdapter having

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

been defined for Action Item Post Process for the final complete action item in the Activity Guide Template definition.

Release Service Indicators

This region enables you to define one or more service indicators/reasons. When the student completes the task, the system releases this defined service indicator(s) for the student.

The fields in this region are similar to the fields of Mass Release page. For information on the Mass Release page:

See Mass Assigning or Mass Releasing Service Indicators

For information on service indicator security:

See "Setting Up Service Indicator Security" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

The system applies in this region the same security to the selection of service indicator and reason as it applies to the Mass Release page. For the service indicator that the system should release when a student completes the task, you - as an administrative user - setting up the task must have the Release option enabled for the combination of Service Indicator Code and Reason in the Service Indicator Security page (this setup is not required for the student who triggers this release). The system automatically triggers this release when the student clicks the Finish button on the Complete page (that is, the system releases the service indicator when the student completes the task).

If any of the Start Date, End Date, Start Term or End Term values are defined, then at the point the student clicks Finish, the processing that releases service indicators considers those values when matching to records that need to be released for the student.

To view audit records, use the Audit Service Indicators page (Campus Community >Service Indicators >Person >Audit Service Indicators). For more information:

See Auditing Service Indicators

Note: You can use the Mass Assign page to assign one or more service indicators to each student who has a particular task. To run the Mass Assign process, using PS Query, the query must include the bind record SCC_BND_SRCIND. An example PS Query is delivered (SCC_TM_SI_TASK_LIST) that can be used with the Mass Assign process.
Alternatively, you can assign a service indicator to each student using the Mass Assign process and then run the Assign Tasks process to create a task for every student with that service indicator using a PS Query to identify the population of students.

Navigation

Use this region to specify the page that should appear for:

- *Default Exit*: When the student clicks the Exit button and then the OK button for confirming the exit from the task and the student accessed the task from an email link.
- *Complete Task*: When the student completes a task.

For example, you can define that the My Planner page should appear when a student completes a task.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Further details on the navigation when a student clicks Exit are given under Pagelet Options in the "Program Registration Template" subsection of the preceding "Setting Up Activity Guide Templates" section.

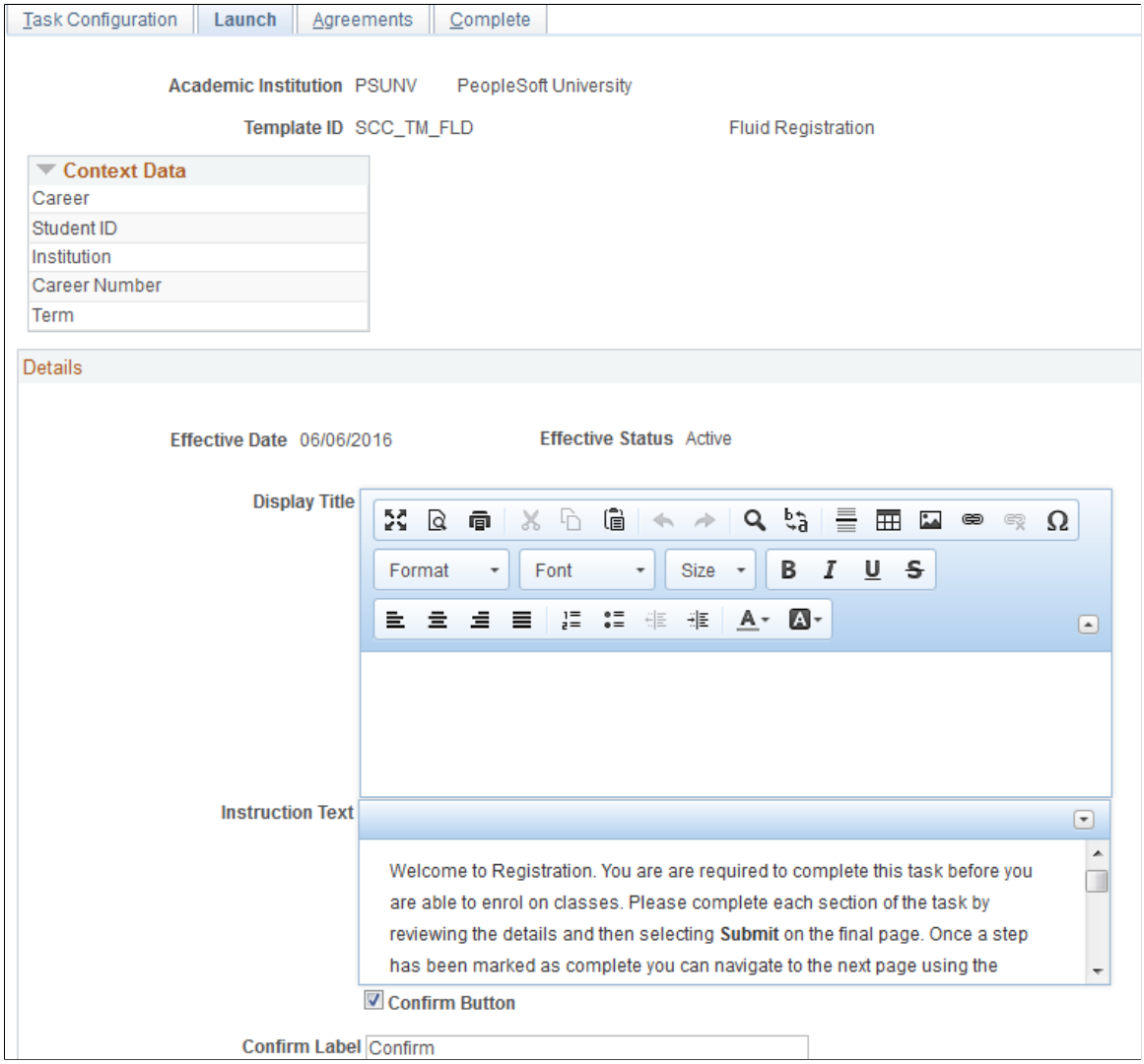
See Setting Up Activity Guide Templates

Defining Launch Page Properties

Access the Launch page (Campus Community >Task Management WorkCenter >Task Configuration >Launch).

Image: Launch page (1 of 2)

This example illustrates the fields and controls on the Launch page (1 of 2). You can find definitions for the fields and controls later on this page.



Display Title Enter the page title that is displayed to the student.

This is an optional field for Fluid tasks because the Display Title appears as a secondary title below the action item title. For

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Classic tasks however, the Display Title is displayed as the page title.

Instruction Text

Enter the text that appears after the page title to describe the actions that the student needs to perform. This is an optional field.

Note: You can enter text to indicate to the student that clicking the Next button on a page signifies that the student has reviewed the data on an action item page and is satisfied to proceed.

Confirm Button

For Fluid interfaces only. Include an action button on the launch page. The user can review read-only details on the page such as career information, and then click the action button to complete the required action item. By default, the Confirm button is not selected.

Selecting the Confirm button has the following impact:

- *Campus Preferences page*: Changes are saved and the action item is set to complete irrespective of changes made. The Confirm button is then disabled and greyed out. Any subsequent changes re-enable the Confirm button to allow the saving of changes. Subsequent changes are lost unless the user selects Confirm again before moving to the next step.
- *Privacy Restrictions page:* Changes are saved and the action item is set to complete irrespective of changes made. The Confirm button is then disabled and greyed out. Any subsequent changes re-enable the Confirm button to allow the saving of changes. Subsequent changes are lost unless the user selects Confirm again before moving to the next step.
- *Ethnicity pages:* Changes are saved and the action item is set to complete irrespective of changes made. The Confirm button is then disabled and greyed out. The action item continues to be set to complete if a new background record is added or an existing record is edited.
- *Biographic Details page:* Changes are saved and the action item is set to complete irrespective of changes made. The Confirm button is then disabled and greyed out. Selecting Save after editing individual fields does not affect the action item's status.

Confirm Label

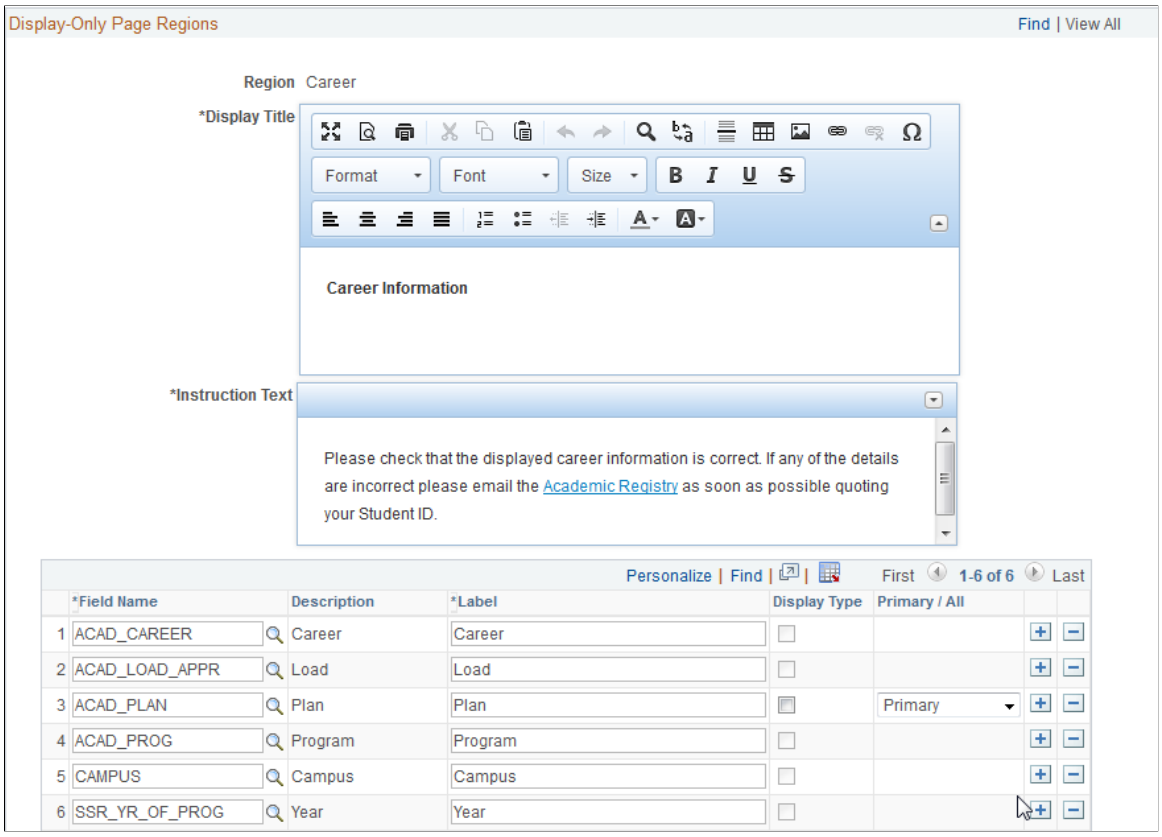
For Fluid interfaces only. Use this field to override the default Confirm label for the button. You can use a maximum of 40 characters in mixed case format. The field is enabled only if the Confirm Button is selected.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

You can format the text for both Display Title and Instruction Text fields using the formatting options including the ability to add URL and email links particularly for the Instruction Text field.

Image: Launch page (2 of 2)

This example illustrates the fields and controls on the Launch page (2 of 2). You can find definitions for the fields and controls later on this page.



Display-Only Page Regions

Optional. Use this group box to define one or more read-only data regions that the system displays on the launch action item page after the page title and instruction text. The information that the data region displays is based on the context data. You can choose to display career information and contact information (addresses, email addresses, phone numbers and emergency contacts), with instructions on how the student can notify the institution of any incorrect information.

Region

Select which data regions the launch action item page should display. You can add rows to select the following data regions:

- Addresses
- Career information
- Email
- Emergency contacts
- Phone numbers

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

The fields that appear in the Display-Only Page Regions group box depend on the value that you select for the Region field.

The launch action item page displays these regions in a fixed order depending on which regions are included. You cannot modify this order. The fixed order is:

(1) Addresses (2) Phone (3) Email (4) Emergency Contacts (5) Career information.

Note: The launch action item page can display career information only if the context data for the task includes the key values: EMPLID, ACAD_CAREER and STDNT_CAR_NBR.

Display Title

Enter the title that is displayed for the data region. For example, if the region you select is *Addresses*, you can enter here *Your Address Information*.

Instruction Text

Enter additional information that follows after the display title. For example, if the region is *Career*, you can enter here *Review your program information. If the information is incorrect, please contact the department head.*

Address 1 Type, **Address 1 Label**, **Address 2 Type**, and **Address 2 Label**

These fields become available for entry when you select *Addresses* in the Region field.

You can select one or two address types to display and configure the label field to display the address type with a description rather than the default description of the selected address type.

Phone 1 Type, **Phone 1 Label**, **Phone 2 Type** and **Phone 2 Label**

These fields become available for entry when you select *Phone* in the Region field.

You can select one or two phone types to display and configure the label field to display the phone type with a description rather than the default description of the selected phone type.

Preferred Phone

This option becomes available for edit when you select *Phone* in the Region field. Select this option if you want the data region to not consider the Phone Type 1 and 2 values and display only phone records with Preferred flag.

Email 1 Type, **Email 1 Label**, **Email 2 Type**, and **Email 2 Label**

These fields become available for entry when you select *Email* in the Region field. You can select one or two email types to display and configure the label field to display the email type with a description rather than the default description of the selected email type.

Preferred Email

This option becomes available for edit when you select *Email* in the Region field. Select this option if you want the data region to not consider the Email Type 1 and 2 values and display only email records with Preferred flag.

Primary Contact Only

This option becomes available for edit when you select *Emergency* in the Region field. Select this option if you want the

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

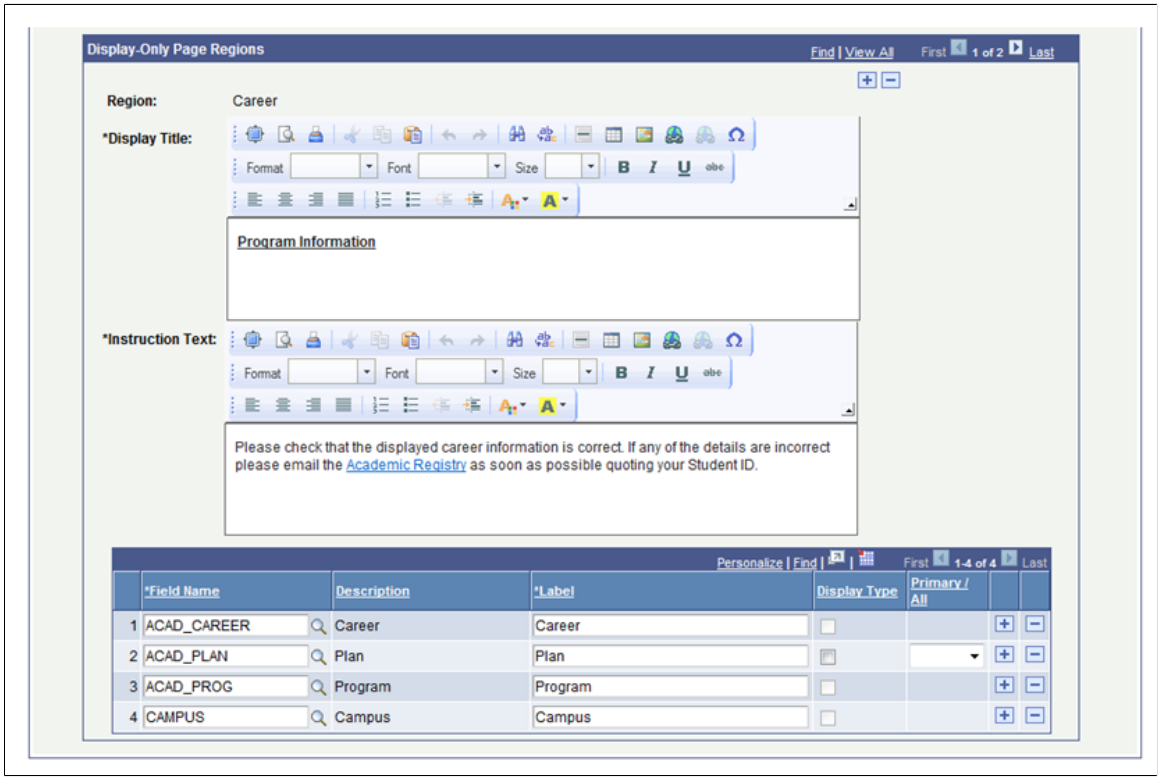
data region to display only primary emergency contact. If you do not select this option, all emergency contacts are displayed.

Field options for career information

This example shows the grid that contains some of the field options for career information:

Image: Example of fields options for career information

This example illustrates the grid that contains some of the field options for career information.



This grid is available for edit only when you select Career in the Region field. Use this grid to add the fields that you want to display in the Career data region of the launch action item page. If you do not include a field in this grid, then that field is not displayed on the launch page.

Field Name and **Description**

The prompt values are from the Field Setup page.

Label

The value defaults from the Description field. You can override this value if you want to display a different label for the field on the Career data region.

Display Type

Available for edit only if you select *ACAD_PLAN* or *ACAD_SUB_PLAN* in Field Name.

If you select this option, the Career data region displays the plan or subplan type description in addition to any defined label.

The format is *<label>: <type> <field value description>*. For example, if there is a label for *ACAD_PLAN* and you have selected Display Type, then this is displayed:

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Plan: Major Music

Where *Plan* is the label, *Major* is the academic plan type, and *Music* is the field value description.

Primary/All

Available for edit only if you select *ACAD_PLAN* in Field Name.

If you select *Primary*, the Career data region displays only the description of the academic plan with the lowest plan sequence (PLAN_SEQUENCE). If you select *All* or do not select a value, all the plan descriptions for the Student Program are displayed in plan sequence order.

The following table describes the source of the value for each Field Name. The system displays this value in the Career Data region.

Field Name	***Notes***
INSTITUTION	Displays the description for the INSTITUTION value from context data. This can be excluded if required; the institution value can also be included in the context data displayed for the task in the Student Task WorkCenter.
ACAD_CAREER	Displays the description for the ACAD_CAREER value from context data.
ACAD_PROG	Displays the description for the ACAD_PROG value from Student Program for the combination of ACAD_CAREER and STDNT_CAR_NBR from context data.
ACAD_PLAN	Displays the description for the ACAD_PLAN value from Student Plan. If *Primary* is selected only the description of the academic plan with the lowest plan sequence (PLAN_SEQUENCE) is displayed (PLAN_SEQUENCE from ACAD_PLAN), otherwise (either *All* is selected or no value is selected in the Primary/All field) all the plan descriptions for the Student Program are displayed in plan sequence order. If the Display Type option is selected, the plan type as well as the label and field value description is displayed.
ACAD_SUB_PLAN	Displays the descriptions of all the academic subplans (ACAD _SUB_PLAN from ACAD_SUBPLAN) for each of the displayed academic plans in alphabetical order by subplan code. If the Display Type option is selected, the subplan type as well as the label and field value description is displayed.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Field Name	*Notes*
CAMPUS	Displays the description for the CAMPUS value from Student Program (ACAD_PROG).
ACAD_LOAD_APPR	Displays the long translate name for the ACAD_LOAD_APPR value from Student Program (ACAD_PROG).
SSR_YR_OF_PROG	Displays the long translate name for the SSR_YR_OF_PROG value from Student Program (ACAD_PROG).

Note: The launch action item page displays values from the most recent effective dated row on or before the current date in the Student Program record, excluding any future rows. Careers are displayed only if the program status is active (AC).

Note: The sequence of the fields displayed on the launch action item page is determined by a tree structure that relates to the underlying record structure. This is fixed as follows and is not related to the row numbers in the grid:

- Institution
- Career
- Program
- Plan
- Sub-plan
- Academic Load
- Campus
- Year of Program

Defining Agreement Pages

Access the Page Definitions page (Campus Community >Task Management WorkCenter >Page Definitions).

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Page Definitions page (1 of 2)

This example illustrates the fields and controls on the Page Definitions page (1 of 2). You can find definitions for the fields and controls later on this page.

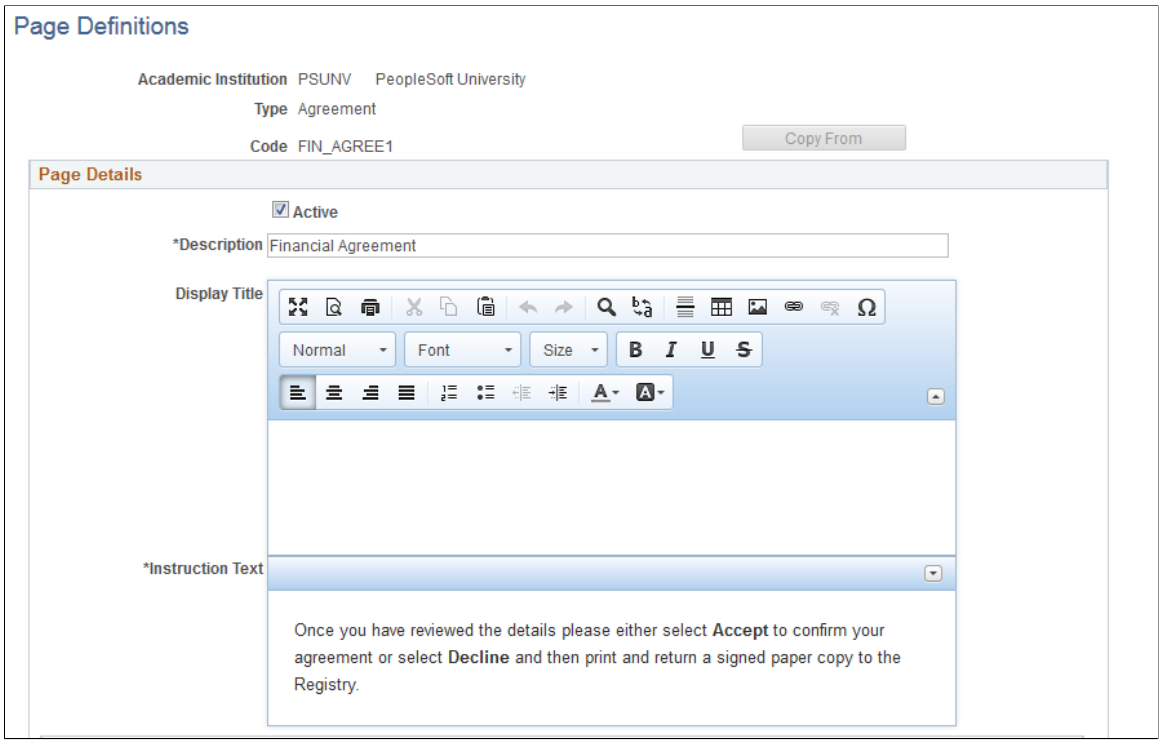
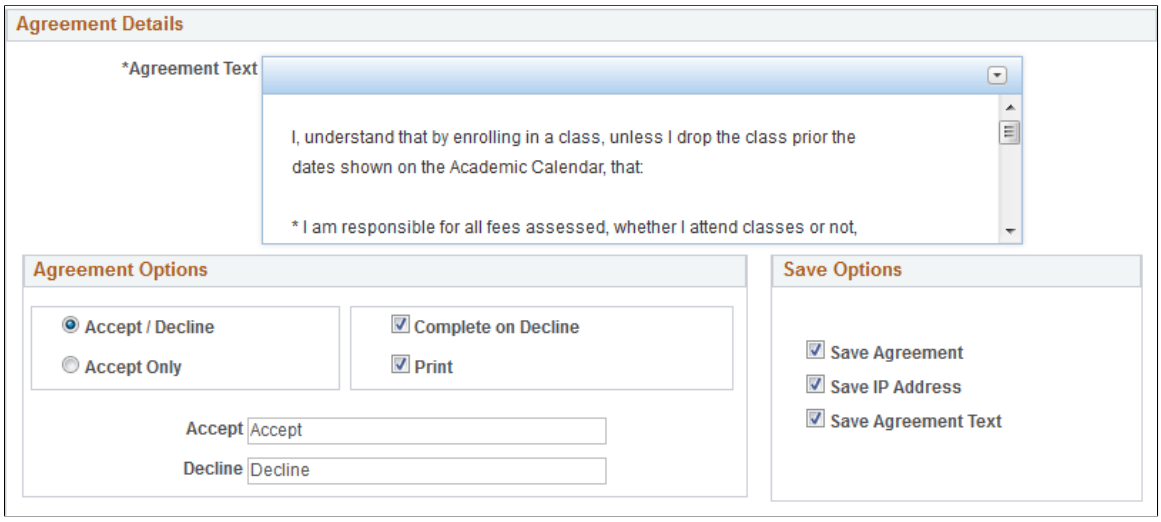


Image: Page Definitions page (2 of 2)

This example illustrates the fields and controls on the Page Definitions page (2 of 2). You can find definitions for the fields and controls later on this page.



This page enables definition of multiple different agreement action item pages that can be associated with one or more tasks in the Task Configuration component's Agreements page. Define and format the agreement text and other instructions that are to be displayed on the agreement action item page.

Note: When you add a new page definition for an agreement page, the page code must begin with either a letter or a number and be a minimum of two characters.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

You can configure whether or not the agreement details (such as text, user ID, IP address, date/time signed and so on) needs to be saved as a separate record for audit purposes.

Copy From

This button is available only when you add a new page definition. Click this button to copy any existing page definition details to the new page definition that you are creating.

Description

Enter a description to be used for internal purposes only. This is not displayed to the student.

Display Title

Enter the page title that is displayed to the student.

This is an optional field for Fluid tasks because the Display Title appears as a secondary title below the action item title. For Classic tasks however, the Display Title is displayed as the page title.

Instruction Text

Enter the text that appears after the page title to describe the actions that the student needs to perform.

Agreement Text

Enter the text that is displayed to the student after the page title and instruction text. This is a long char field and the maximum characters is determined by the database depending on how the text is formatted.

You can use this field to include the full text of the institution's terms and conditions or regulations, or include a link with instructions for the student to navigate to the details and then come back to accept the terms and conditions.

Agreement Options

Accept/Decline

If selected the student is presented with radio button options to either Accept or Decline the agreement in classic tasks. For Fluid tasks, both Accept and Decline buttons are provided.

This is provided for cases where the student has the option of declining and then printing, signing and returning a paper copy of the agreement. Instructions can be included in the instruction text.

For the Accept/Decline Buttons to be displayed on mobile devices without the need for horizontal scrolling, ensure that label values have a maximum of 20 characters each (40 totally) where both Accept and Decline are included.

Accept Only

If selected, the student is presented with a single check box option or button to confirm they have read and accepted the agreement.

Accept Label

Enter the text to be displayed for the accept option in a classic interface. For example, you can enter *I agree to abide by the rules and regulations specified above.*

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

For Fluid tasks, for the Accept Button to be displayed on mobile devices, without the need for horizontal scrolling, ensure that the label value has a maximum of 40 characters. For classic tasks, for display on laptops and desktops, the label value can contain a maximum of 100 characters.

Decline label

Available for edit only if you select the Accept/Decline option. Enter the text to be displayed for the decline option.

For Fluid tasks, for the Decline Button to be displayed on mobile devices without the need for horizontal scrolling, ensure that the label value has a maximum of 40 characters. For classic tasks, for display on laptops and desktops, the label value can contain a maximum of 100 characters.

Complete on Decline

This check box is enabled only if the Accept/Decline option is selected. By default, it is not selected.

If this option is selected, then the action item status is set to Complete when the student selects either Accept or Decline. If this option is not selected, and the student selects Decline, the action item status remains *In Progress*.

Print

If selected the student is presented with the Printable Page option that enables the student to print the agreement. This option is not available for Fluid tasks on small mobile devices, such as smart phones.

Save Options

Save Agreement

If selected, the system saves the agreement record (related but separate from the task record) with:

- User ID
- Agreement Date/Time
- Agreement Status: *Accepted* or *Declined*

If you do not select this option, then a separate agreement record is not saved. However, when the student selects the agree option, the action item in the task is still marked as *Completed*. The action item remains *In progress* if the student selects the decline option.

Note: You should select the Save Agreement option, if the Accept/Decline option has been selected in the Agreement Options group box. This ensures that the system records the accept/decline decision of the student.

Save IP Address

Available for edit only if you have selected the Save Agreement option.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

If selected, the system also saves the student's IP address in the agreement record.

Save Agreement Text

Available for edit only if you have selected the Save Agreement option.

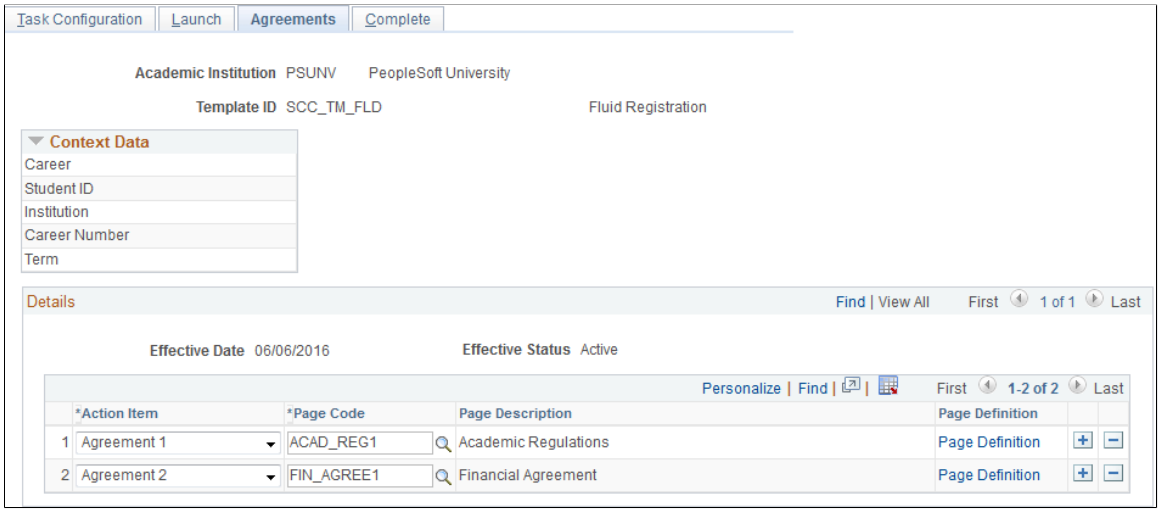
If selected, the system also saves the full agreement text in the agreement record.

Defining Agreement Page Properties

Access the Agreements page (Campus Community >Task Management WorkCenter >Task Configuration >Agreements).

Image: Agreements page

This example illustrates the fields and controls on the Agreements page. You can find definitions for the fields and controls later on this page.



Action Item

Select the agreement page for the activity guide template. Values for this field are delivered with your system as translate values. The nine delivered values that appear here are: *Agreement 1* to *Agreement 9*.

Page Code

Select the page code for the action item. The page codes are created in the Page Definitions page.

See the previous subsection "Defining Agreement Pages".

Page Definition

Click to access the Page Definition page, where you can review or edit the page code details.

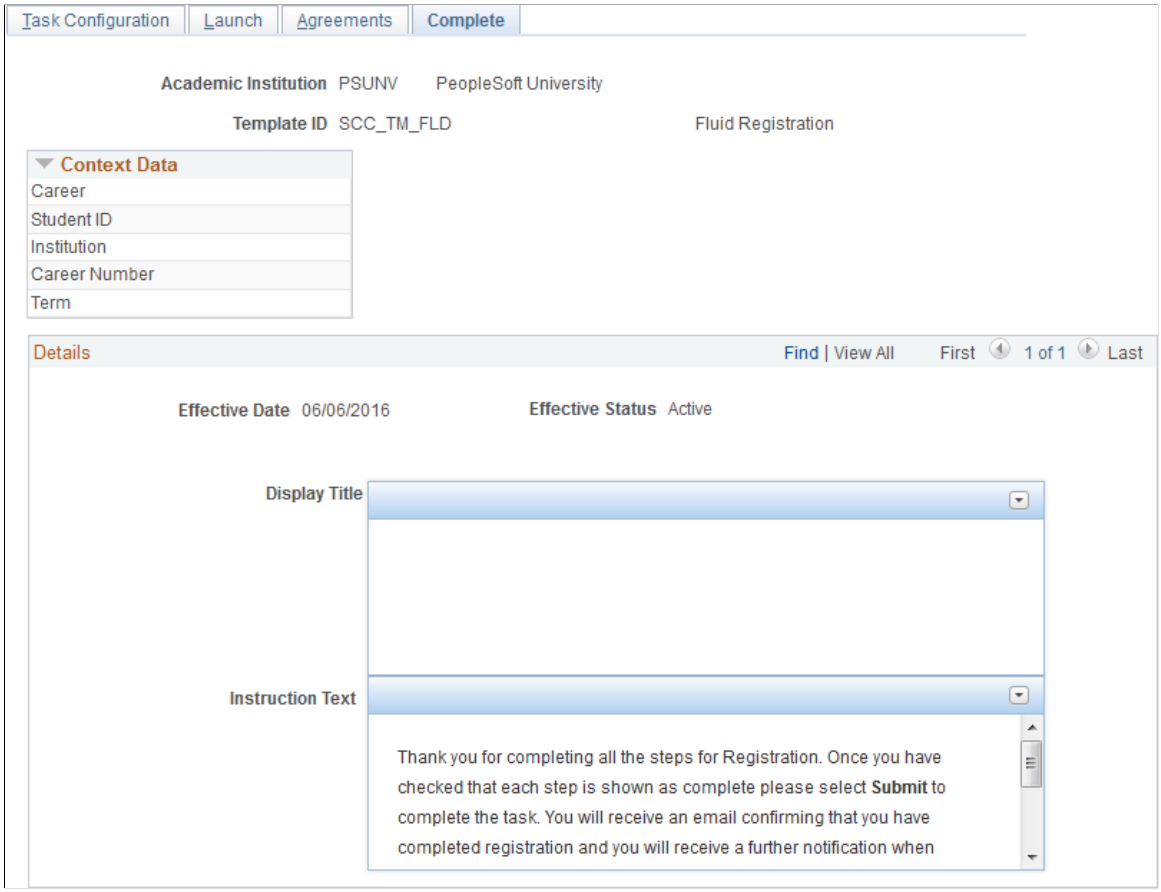
Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Defining Complete Page Properties

Access the Complete page (Campus Community >Task Management WorkCenter >Task Configuration >Complete).

Image: Complete page

This example illustrates the fields and controls on the Complete page. You can find definitions for the fields and controls later on this page.



Display Title Enter the page title that is displayed to the student.

This is an optional field for Fluid tasks because the Display Title appears as a secondary title below the action item title. For Classic tasks however, the Display Title is displayed as the page title.

Instruction Text Enter the text that appears after the page title to describe the actions that the student needs to perform.

When the student clicks the Finish or Submit button on the Complete page, the task status is set to *Completed*. If subsequent tasks are configured, then new tasks are assigned. If a notification is configured, then a notification is generated for the student.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Managing Tasks

This section discusses:

- Task Management Workcenter.
- Assigning tasks to students in batch.
- Managing tasks using the Task List component.
- Managing tasks using the PeopleTools components.
- Viewing or updating a student agreement.
- Viewing task activity.
- Using Batch Notifications process for sending reminders.
- Updating tasks in batch.
- Deleting tasks in batch.

Pages Used to Manage Tasks

Page Name	***Definition Name***	***Navigation***	***Usage***
Task Management WorkCenter	SCC_TM_ADMN_WRKCTR	Campus Community >Task Management WorkCenter	Configure and manage tasks.
Assign Tasks	SCC_TM_BAT_CREATE	Campus Community >Task Management WorkCenter >Assign Tasks	Run the process to assign tasks to students in batch based on Population Selection or Student Groups. You can also run this process for individual students.
Task List	SCC_TM_ADM_LIST	Campus Community >Task Management WorkCenter >Task List	Search for tasks assigned to students. Manage tasks assigned to students, for example, adding action items and changing the status to *In Progress* or *Complete*.
View Agreements	SCC_TM_AGRMNT	Campus Community >Task Management WorkCenter >View Agreements	Search for agreement records of students. View and update agreement records of students.
View Task Activity	SCC_TM_TASK_LOG	Campus Community >Task Management WorkCenter >View Task Activity	View updates to tasks that students have made via the Student Task WorkCenter.

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

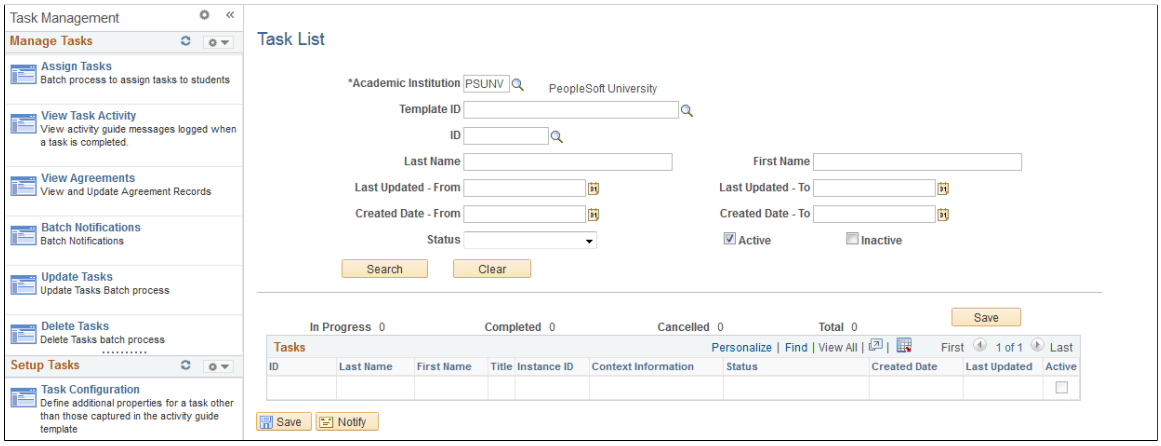
Page Name	Definition Name	Navigation	Usage
Batch Notifications	SCC_BAT_NTF	Campus Community >Task Management WorkCenter >Batch Notifications	Run the process to generate reminder notifications in batch for *In Progress* tasks based on Population Selection.
Update Tasks	SCC_TM_BAT_UPDATE	Campus Community >Task Management WorkCenter >Manage Tasks >Update Tasks	Update Activity Guide instances based on Population Selection. You can update tasks for an individual or a group.
Delete Tasks	SCC_TM_BAT_DELETE	Campus Community >Task Management WorkCenter >Manage Tasks >Delete Tasks	Delete Activity Guide instances based on Population Selection. You can delete tasks for an individual or a group.

Task Management WorkCenter

Task Management WorkCenter offers you access to task transactions from one central location. You can use this workcenter to configure and manage tasks for Campus Solutions. Access the Task Management WorkCenter (Campus Community >Task Management WorkCenter).

Image: Task Management WorkCenter

This example illustrates the fields and controls on the Task Management WorkCenter.



See this section and the “Configuring Tasks” section for more information about how to use the links on this page.

See Configuring Tasks

Task Management WorkCenter is a PeopleTools Portal – WorkCenter page.

See the product documentation for *PeopleTools: Portal Technology*, Creating and configuring WorkCenter pages.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Assigning Tasks to Students in Batch

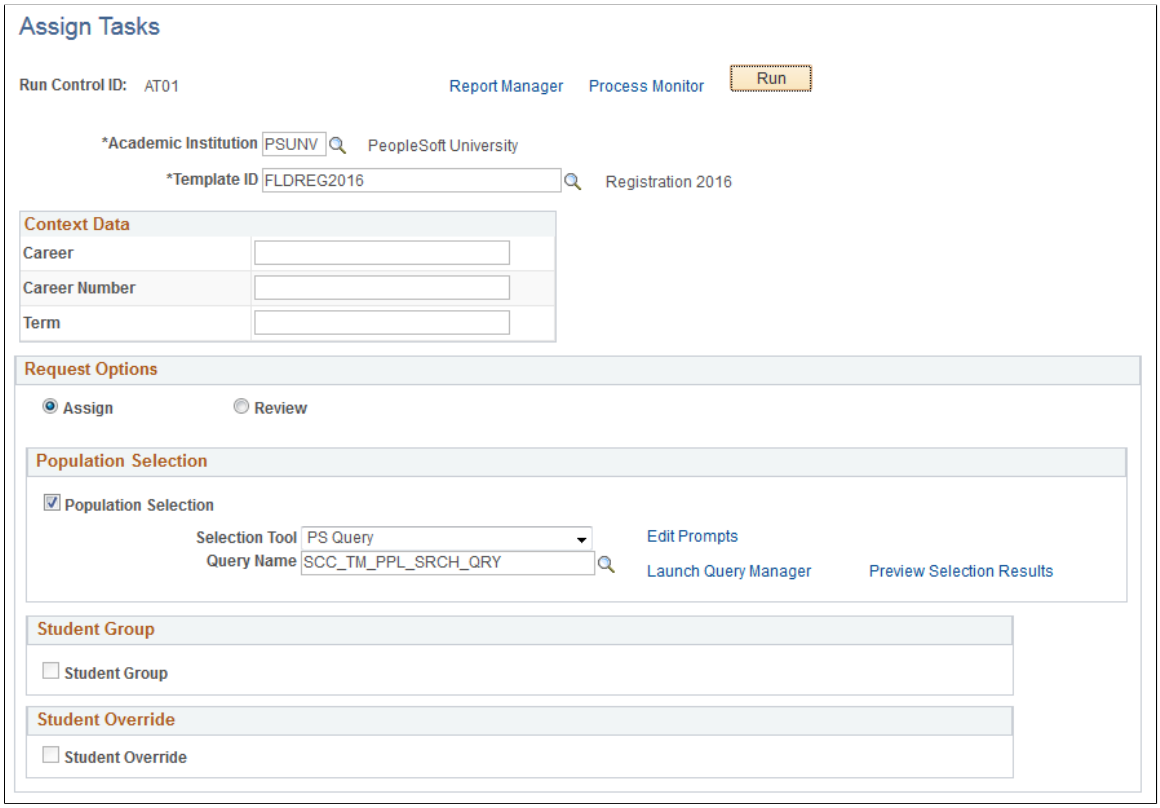
Bundle 52

Added CLASS_NBR, ACAD_PLAN, and SESSION_CODE to support additional context data in Population Selection for the Assign Tasks process.

Access the Assign Tasks page (Campus Community >Task Management WorkCenter > Assign Tasks).

Image: Assign Tasks page

This example illustrates the fields and controls on the Assign Tasks page. You can find definitions for the fields and controls later on this page.



Assign Select to run the Assign Tasks process based on the chosen request options (Population Selection, Student Group or Student Override).

Review Select to run the process in review mode.

This option can be used to review the current task records against the population selection criteria originally used to create the tasks and identify students who no longer meet the criteria for the task or whose context data has changed and needs to be updated.

If you select this option, only Population Selection is available (Student Group and Student Override become unavailable).

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

When you select this option, the process compares the population and the assigned *In Progress* tasks to determine:

- Students in the population who are not assigned tasks. The process can then be run with Assign selected to add the tasks for these students.
- Students who have an assigned task with matching context data compared with the values in the population selection but the task status is *Cancelled*. You can then update the task status via the Task List page.
- Students who have an assigned *In Progress* task with different context data as compared to the values in the population selection. You can then update the task via the Task List page.
- Students with an assigned *In Progress* task who are not in the population. The task can then be set to *Cancelled* via the Task List page or deleted via the Activity Guide Instances page.

The process adds the results of this comparison in a log file that you can review.

In Assign mode, the Assign Tasks process creates the tasks and populates the context data. The process also handles the checking of prerequisite tasks and triggering of assignment notifications.

For each instance, the Administrator roles defined for the template are copied to the instance. A security record with the Privilege Set ID of Contributor is created for the User ID related to the EMPLID, rather than a Role defined for the template (for example, CS - Student for the delivered templates).

If there is no User ID associated with the EMPLID, the instance is created without a defined Contributor and a message is logged. If the EMPLID is associated with multiple User IDs, Contributor records are created for each User ID and a message is logged.

For each record, the process performs the following:

- If any prerequisite task defined in the Task Configuration component is not complete, the process does not create the task for that student, logs a message and skips to the next student record.
- If there is an existing task for the student (that is, activity guide instance with all context data is matching), the process does not create a task for that student, logs a message indicating that the task already exists and skips to the next student record.
- If the process passes all the above validations, it creates a new activity guide instance for the student and populates the context data, logs a message with the student details confirming that the task has been created.
- For each new activity guide instance created, if a notification has been defined with Trigger = *Assigned* in the Task Configuration component, the process triggers a new notification for the student.

  For Fluid tasks, if the Push Notifications check box is selected, an Alert is generated in the Fluid Notifications flag with a link to access the task.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

In review mode, the Assign Tasks process performs the following:

For the purposes of matching the population and In Progress tasks, the context data values for the population are taken either from the PS Query results or from the Context Data parameter fields.

Step 1. Review population against tasks

For each record in the population:

- If there is a matching activity guide instance for the Template ID, Institution, EMPLID and all the context data and:
  - If the instance status is *Cancelled*, the process logs a message stating that the task is cancelled for the ID.
  - If the instance is *In Progress* or *Complete*, the process does not log a message.
- If there is a matching activity guide instance for the Template ID, EMPLID and Institution but not all the context data matches, then the process logs a message stating that the context information of the task does not match.
- If there is no matching activity guide instance for the Template ID, Institution and EMPLID, then the process logs a message stating that the task is not assigned to the student.

Step 2. Review tasks against population

For each current task (that is, activity guide instance with status *In Progress*) for the Template ID and institution (note: the process does not consider cancelled and completed tasks):

If the student is not in the population, the process logs a message stating that the ID, status and task context is not included in the population.

Context Data

Use this group box to specify the context data parameters.

The system dynamically displays the context data fields in this group box for the template that you have selected.

If you are using Population Selection, then the context data values can come from the query results. In such a case, you need not populate the context data fields. If you are using either Student Group or Student Override or Population Selection with a query that only returns EMPLIDs, then you must specify all the context data values (except Student ID and Institution) that the process uses to create the tasks.

Student ID	This is not displayed in Context Data. The value is derived from the Population Selection, Student Group or Student Override parameters you specify on this page.
Institution	This is not displayed in Context Data. The value is derived from the value you enter in the Academic Institution field of this page.

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Population Selection

Population selection is a method for selecting the IDs to process for a specific transaction. Currently, the Assign Tasks process supports only PS Query for selecting the IDs.

See Understanding the Population Selection Group Box

Select the Population Selection check box.

Bundle 52

Added information to this paragraph regarding fields that support context data.

The Assign Tasks process can be run for a group of students returned by a query. The minimum a query needs to return are the EMPLID values for students. If the query also returns context data values, then those override any context data parameters specified in the Context Data group box. In addition to EMPLID, context data values can be populated from a query for Career (ACAD_CAREER), Career Number (STDNT_CAR_NBR), Term (STRM), Academic Plan (ACAD_PLAN), Class Number (CLASS_NBR), and Session (SESSION_CODE).

Query Name	Select an existing query in the system. The SCC_TM_PPL_SRCH_QRY predefined query is delivered. This sample query returns all the context data required for use with the Program Registration template.

Student Group

Use this group box if you want to run the process for a select group of students.

See Understanding Student Groups

Note: You must specify the context data parameters in the Context Data group box if you are running the process for a student group.

Student Override

Student Override	Select if you want to run the process for the IDs selected in the EmplID field.
ID (employee ID)	Enter the IDs of one or more students to whom the process should assign the task.

Note: You must specify the context data parameters in the Context Data group box if you are using the Student Override group box.

Managing Tasks Using the Task List Page

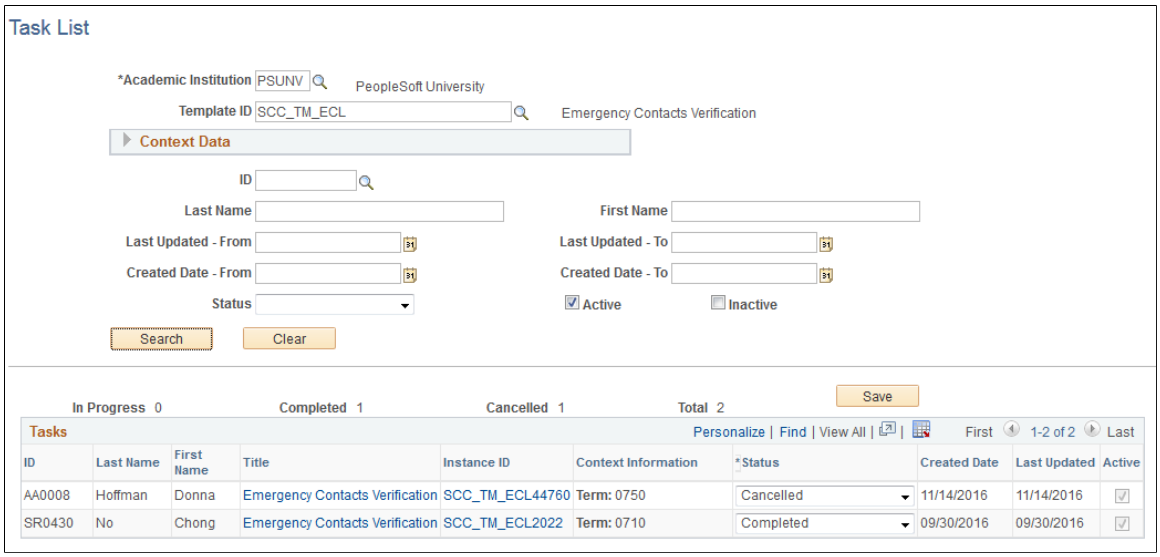
The Task List page has an enhanced functionality when compared with the PeopleTools - Manage Activity Guide Instances page. For example, the Task List page provides more search options and enables you to identify the EMPLID of the student to whom the task is assigned.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Access the Task List page (Campus Community >Task Management WorkCenter >Task List).

Image: Task List page

This example illustrates the fields and controls on the Task List page. You can find definitions for the fields and controls later on this page.



Template ID — The prompt values are based on the institution that you select. The system also restricts these prompt values based on security settings (member privileges) of the template. That is, you can select a template in this field only if you have the security access for the template.

Last Updated – From and **Last Updated – To** — Use these fields to narrow the search to only those tasks that have been updated by the institution or students within this range.

Created Date – From and **Created Date – To** — Use these fields to narrow the search to only those tasks that have been created by the institution within this range.

Tasks

Title — Click to access a PeopleTools - activity guide component where you can view the action items of the instance.

Instance ID — Click to access a PeopleTools - activity guide component where you can view the properties of the instance.

Context Information — Displays the context data (except Institution and EMPLID) for the task.

Status — If needed, change the task status. Available statuses include *Cancelled*, *In Progress* and *Completed*.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

If you do not have security access to the instance, the search results displays the instance with the Title and Instance ID links disabled.

See the product documentation for *PeopleTools: Portal Technology*, Managing activity guide instances.

Managing Instances Using the PeopleTools Components

You can use the PeopleTools Activity Guide components to manually create an instance (task for a student), based on a template. For example, to create an instance based on a template, you can use the Create Instance button on the Activity Guide Template - Properties page. In other words, you can use the button to manually assign a task to a student that the student needs to complete.

Note that the same InstanceCreation method is used by the PeopleTools Activity Guide components when you manually create an instance and the Assign Tasks process.

Use the PeopleTools - Manage Activity Guide Instances page to manage instances, for example, adding action items to an instance or deleting instances. You can access this page from the PeopleTools menu or from the Task Management WorkCenter.

Refer to the *PeopleTools: Portal Technology* documentation for information on creating instances and for fields on the PeopleTools - Manage Activity Guide Instances page.

See the product documentation for *PeopleTools: Portal Technology*, Managing activity guide instances.

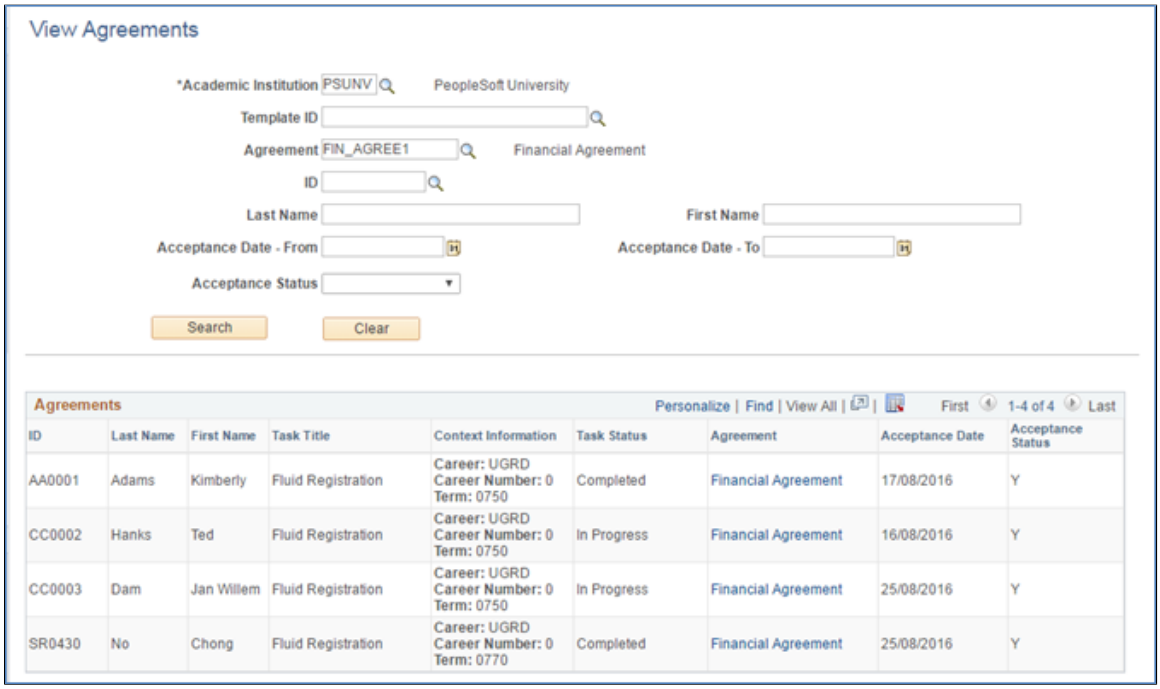
Viewing or Updating a Student Agreement

To search for agreement records, access the View Agreements page (Campus Community >Task Management WorkCenter >View Agreements).

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: View Agreements page

This example illustrates the fields and controls on the View Agreements page. You can find definitions for the fields and controls later on this page.



Template ID The prompt values are based on the institution that you select. The system also restricts these prompt values based on security settings (member privileges) of the template. That is, you can select a template in this field only if you have the security access for the template.

Click the Agreement link in a search record to access the View Agreement Detail page.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: View Agreement Detail page

This example illustrates the fields and controls on the View Agreement Detail page. You can find definitions for the fields and controls later on this page.

This page enables you to view an agreement for audit purposes and as an administrator complete an agreement on behalf of a student (for example, after a student has declined an agreement, printed and signed the agreement and returned a paper copy).

Attachments

Click to access the Agreement Attachments page where you can view, add or delete attachments related to the agreement.

You can add an attachment of a scanned signed paper agreement.

Acceptance Status

Use this check box if student has submitted a paper agreement.

Select the check box to indicate that the student has accepted the agreement.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

	Clear the check box to indicate that the student has not accepted the agreement.
Comment	Enter any comments if you have changed the acceptance status.
Last Updated and **Last Updated By**	The date and time at which the page was last updated and the name of the user who updated the page.

When you click the Save button and if the Acceptance Status check box has been selected, then the system updates the status of the associated action item to *Completed*. If all the required action items (that is, action items with the Required check box selected on the Action Item Details page) for the task are now set to *Completed*, the system performs the following processing (which is the same processing the system performs when the student clicks the Finish button on the Complete Task page):

- Updates instance status to *Complete*.
- Triggers the complete notification.
- Creates subsequent tasks.
- Releases service indicators.

The View Agreements page is updated to also display those agreements where the related instance has been deleted either through the Manage Instances page or by the Delete Tasks process. In such cases, the Task Title is displayed from the related template and Context Information is blank. The Task Title is derived from the first 10 characters of the Instance ID held in the agreement record matched to the Template ID. The Task Status column displays *Deleted* in place of the instance status.

Note: You cannot search by Template ID to find agreements for a deleted instance.

Note: The Acceptance Status and Comment fields can still be updated for agreements associated with deleted instances.

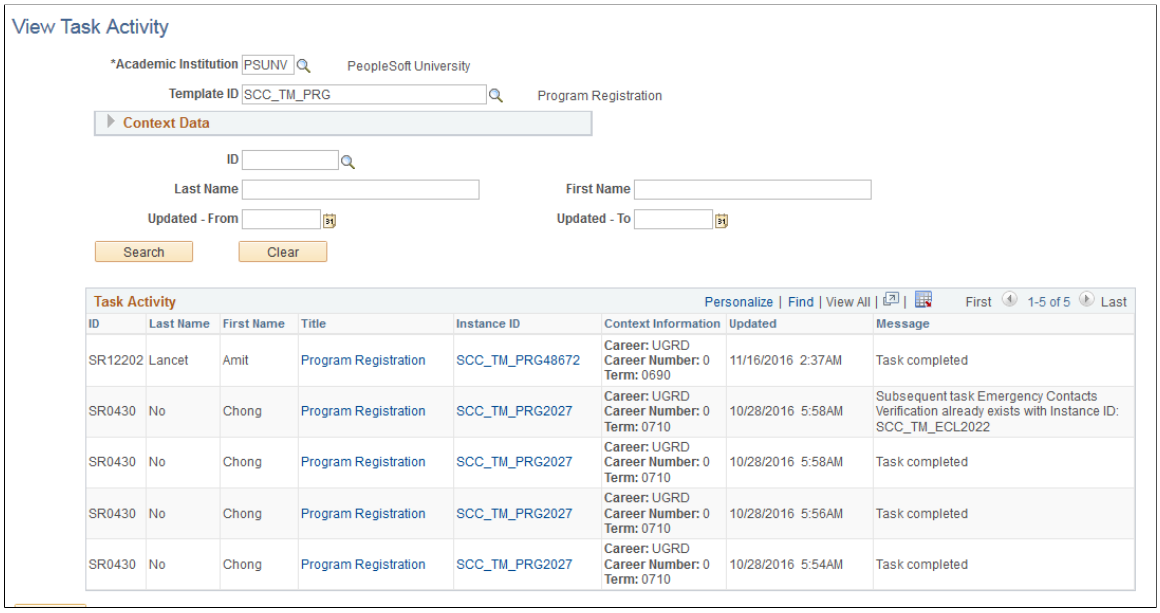
Viewing Task Activity

Access the View Task Activity page (Campus Community >Task Management WorkCenter >View Task Activity).

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: View Task Activity page

This example illustrates the fields and controls on the View Task Activity page. You can find definitions for the fields and controls later on this page.



This page displays records based on the activity guide messages that the system logs when a task is completed.

Messages are logged for the following actions when a student completes a task:

- The task status is updated to *Complete*.
- A new subsequent task is created for the student.
- A subsequent task cannot be created because the current task does not have all the required context data.
- A subsequent task is not created because it already exists for the student.

Template ID

The prompt values are based on the institution that you select. The system also restricts these prompt values based on security settings (member privileges) of the template. That is, you can select a template in this field only if you have the security access for the template.

Task Activity

Title

Click to access a PeopleTools - activity guide component where you can view the action items of the instance.

Instance ID

Click to access a PeopleTools - activity guide component where you can view the properties of the instance.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

If you do not have security access to the instance, the search results displays the instance with the Title and Instance ID links disabled.

Using Batch Notifications Process for Sending Reminders

Access the Batch Notifications run control page (Campus Community >Task Management WorkCenter >Batch Notifications).

Image: Example of Notifications Framework Batch Notifications page (1 of 2)

This example illustrates the fields and controls on the Batch Notifications page (1 of 2)

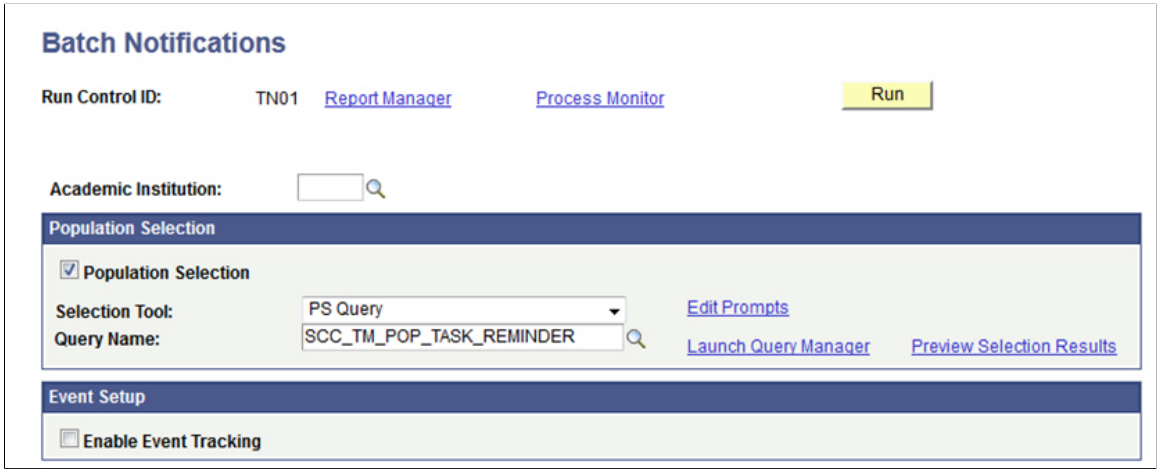
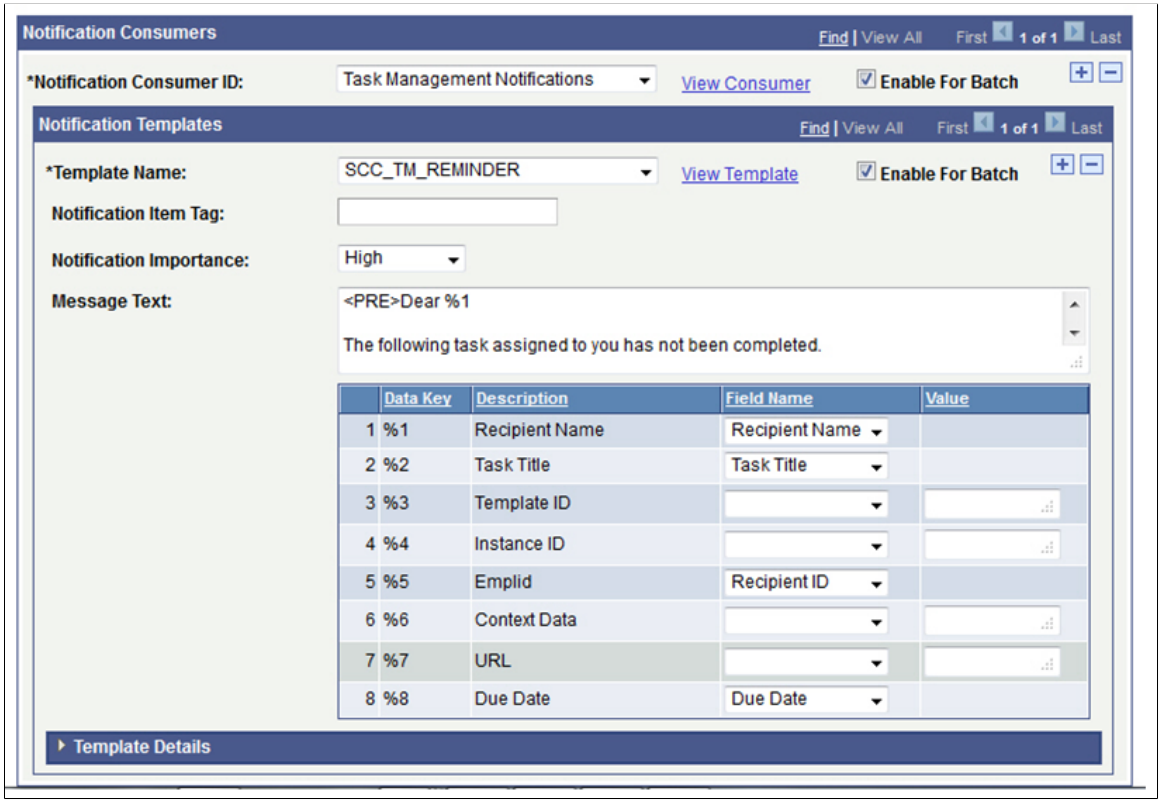


Image: Example of Notifications Framework Batch Notifications page (2 of 2)

This example illustrates the fields and controls on the Batch Notifications page (2 of 2)



 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

You can use the Notifications Framework's Batch Notification process for sending reminder notifications to students with incomplete tasks.

Delivered with the system are the Notification Consumer ID *Task Management Notifications (SCC_NTF_CON_20130619110938)* and the notification setup for an example generic template SCC_TM_REMINDER.

An example PS Query is delivered (SCC_TM_POP_TASK_REMINDER) that you can use for this process. This query returns all the *In Progress* tasks with the data required to populate the example generic template.

Note: If you are creating your own query, then the query needs to include PEOPLE_SRCH.

In the Batch Notification page, after selecting the Query Name, click Edit Prompts to add the Academic Institution and Template ID values for the task. After selecting the Notification Consumer ID and Template Name, define the Field Name value for each of the variables used in the Message Text region.

A PS Query cannot provide the student/task specific URL to open the Student Task WorkCenter. Therefore, if you want to include a URL in the email, then define the URL in the Value field. The URL can point to the Student Center or to the Current Tasks pagelet and the student can then click the task link to complete the task. Note that the URL cannot be defined to directly open the Student Task WorkCenter for the task because the batch process is generating notifications for multiple students.

See Understanding the Notifications Framework

Updating Tasks in Batch

Use this batch process to update Activity Guide instances. You can select instances for updating based on Institution, Template ID, Existing Status, and Context Data values (such as, the STRM value for Fluid Registration).You can refine your search by selecting either Population Selection or Student Override methods.

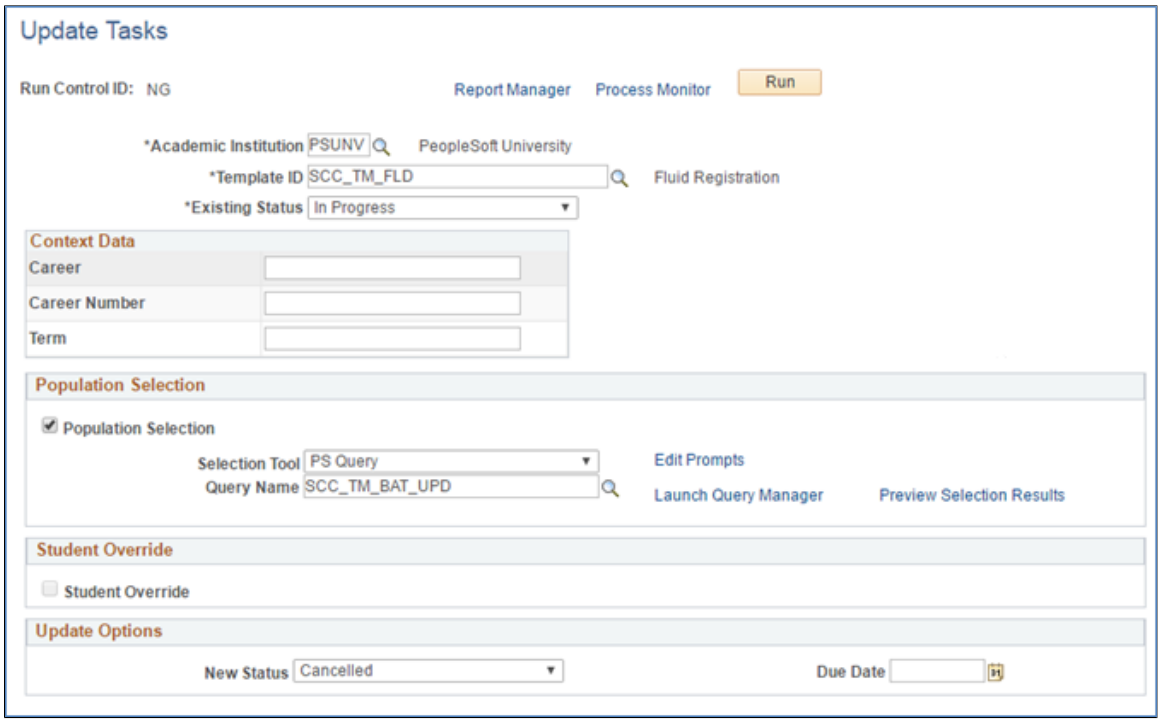
A user with HCCPCSSA1000 CS Administration – All Pages permissions can use the Update Tasks process.

Access the Update Tasks page (Campus Community >Task Management WorkCenter >Manage Tasks >Update Tasks).

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Update Tasks page

This example illustrates the fields and controls on the Update Tasks page. You can find definitions for the fields and controls later on this page.



Template ID

Select a value prompted by the user's administrator access.

Existing Status

Select a value based on translate values for SCC_TM_EX _STATUS: *All (AL), In Progress (IP), Cancelled (CA) and Completed (CP)*. The default is *In Progress (IP)*.

The process only updates instances with the selected Status. To update instances irrespective of Status, select *All*.

Note: An institution can deactivate codes according to need. For example, removing *All* and *Completed,* would restrict updates to In Progress and Cancelled instances.

Context Data

Enter values by which to filter the updated instances.

You cannot use *Institution* as that is filtered using Academic Institution, or *Student ID* as that is filtered using either Population Selection or Student Override.

Population Selection

Select *PS Query* as the Selection Tool.

Select a Query Name based on the SCC_TM_PTAILIST record. The query should return the records for the selected Institution and Template ID that are to be updated. An example query SCC _TM_BAT_UPD, is delivered with prompts for Institution and Template ID that should be set to match the process parameters.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

	You must select either Population Selection or Student Override to run the process.
Student Override	Select the check box to view a Students grid, in which you can search for specific EMPLIDs. You must populate the grid with at least one ID.
Update Options	Select a new, updated status for the selected instances: *In Progress (IP), Cancelled (CA)* or *Completed (CP)*. Update the existing Due Date of the selected instances. You must select either or both, the New Status and Due Date, to run the process.

The Update Tasks process comprises the selection of the instances and their update:

Task selection: You can run the Update Tasks process only on instances that meet all of the following conditions:

- The *Institution* parameter matches the value in the Context Data for the instance.
- The *Template ID* parameter matches the parent template of the instance.
- The Existing Status parameter is *All* or matches the instance status.
- Any other provided Context Data parameters match the equivalent values for the instance.
- If a PS Query is defined under Population Selection, the Instance ID appears in the query results.
- If Student Override is selected, the EMPLID in the Context Data for the instance matches one of the defined IDs.

Note: The instance Active flag is not considered unless added as one of the criteria in the PS Query.

Note: Even if you use a PS Query to determine the Instance IDs for the records to be updated, the process also matches the *Institution, Template* and *Existing Status* parameters before execution.

Task update: The process performs the following on each selected instance:

- If the user does not have security access to the instance, the instance is not updated and an error message is logged.
- If a New Status value is provided, the existing status value is updated and a confirmation message is logged. If the status is being updated to *Completed*, the following processing based on Task Configuration is performed.
    - Remove service indicators.
    - Create any subsequent tasks.
    - Remove any push notifications for the instance (Fluid instances only).

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Note: A *Task completed* message is not saved in the task activity log.
Complete task notifications are not triggered.
The statuses of individual action items are not updated and agreements are not completed or saved on behalf of the student.

- If a new Due Date value is provided:
  - If the new Due Date is earlier than the existing Start Date of the instance, the Due Date of the instance is not updated and a message is logged.
  - If the new Due Date is on or after the existing Start Date, or the existing Start Date is blank, the Due Date of the instance is updated and a confirmation message is logged.
- For each updated instance, the last update date/time is updated to current date/time and the last update Operator ID is updated to the user running the process.

Related Links

Assigning Tasks to Students in Batch

Deleting Tasks in Batch

Use this batch process to delete incomplete or cancelled Activity Guide instances. You can select instances for deleting based on Institution, Template ID, Existing Status, and Context Data values. You can refine your search by selecting either Population Selection or Student Override methods.

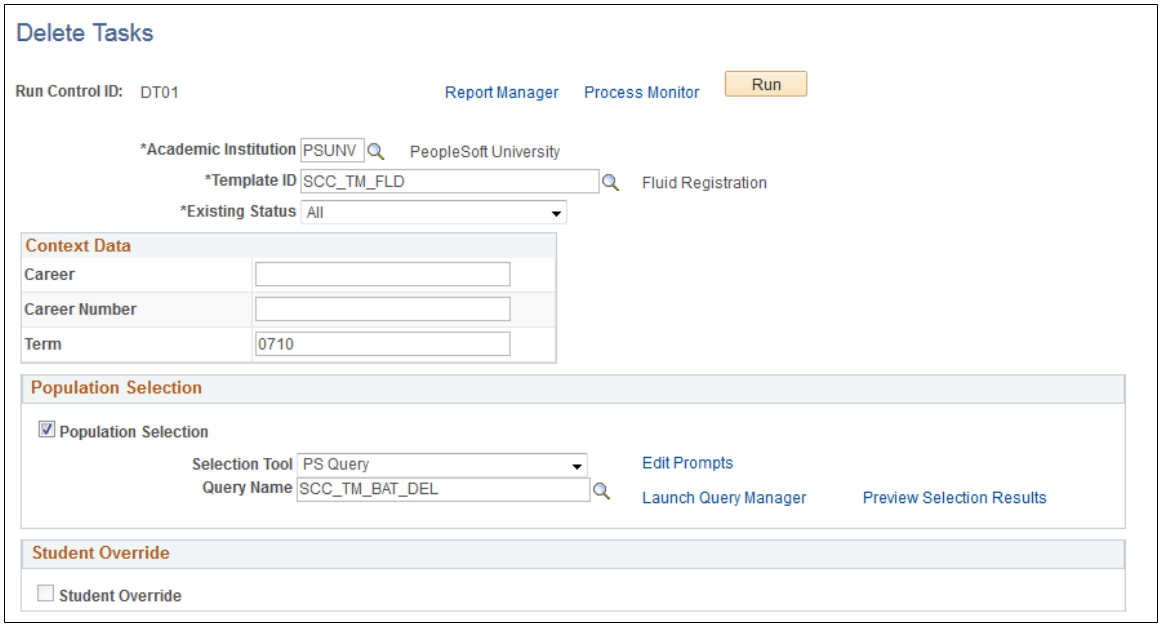
A user with HCCPCSSA1000 CS Administration – All Pages permissions can use the Delete Tasks process.

Access the Delete Tasks page (Campus Community >Task Management WorkCenter >Manage Tasks >Delete Tasks).

 Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Image: Delete Tasks page

This example illustrates the fields and controls on the Delete Tasks page.



The fields and controls on the Delete Tasks page are the same as those on the Update Tasks page. For details, see Updating Tasks in Batch.

The Delete Tasks process comprises the selection of the instances and their deletion:

Task selection: You can run the Delete Tasks process only on instances that meet all the required conditions described in the Update Task instance selection process.

Task delete: If the user running the process has security access, the process deletes the instance record and associated action items for every selected instance, and a confirmation message is logged.

Note: The Delete Tasks process does not delete the Agreement records associated with the instances being deleted.

Related Links

Viewing or Updating a Student Agreement

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved.