

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### Introduction

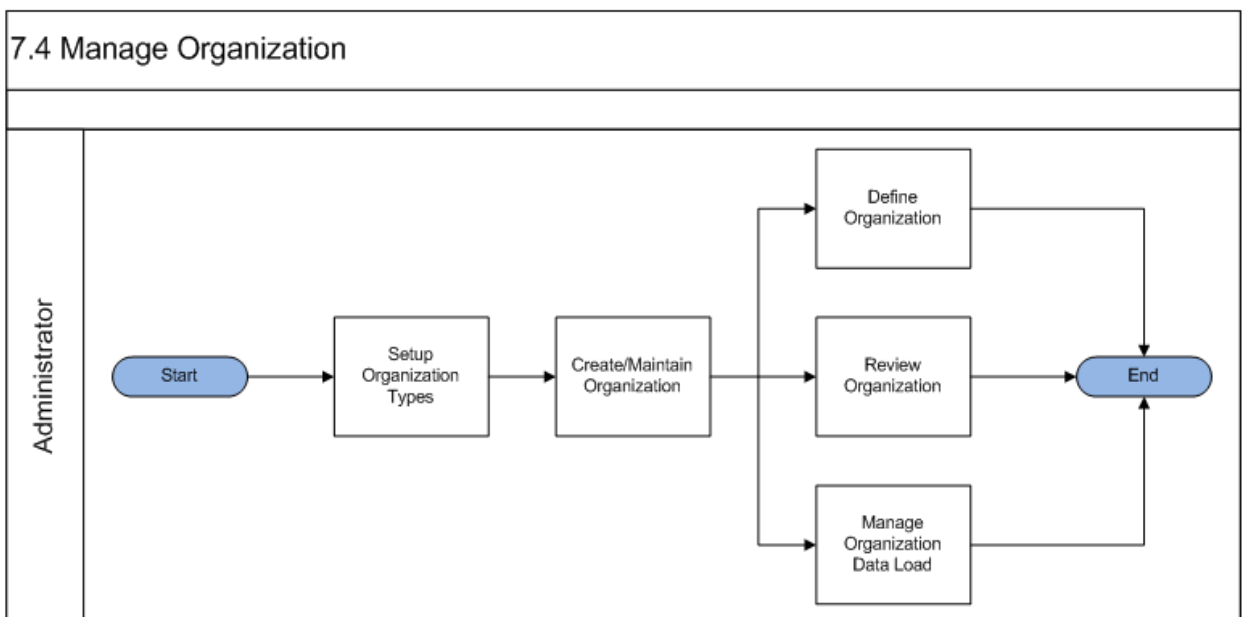
A module to manage organizations and committees and this training will help you to fully understand all the steps how to manage organizations and committees in KSAU-SIS.

#### Understanding the Manage Organizations and Committees

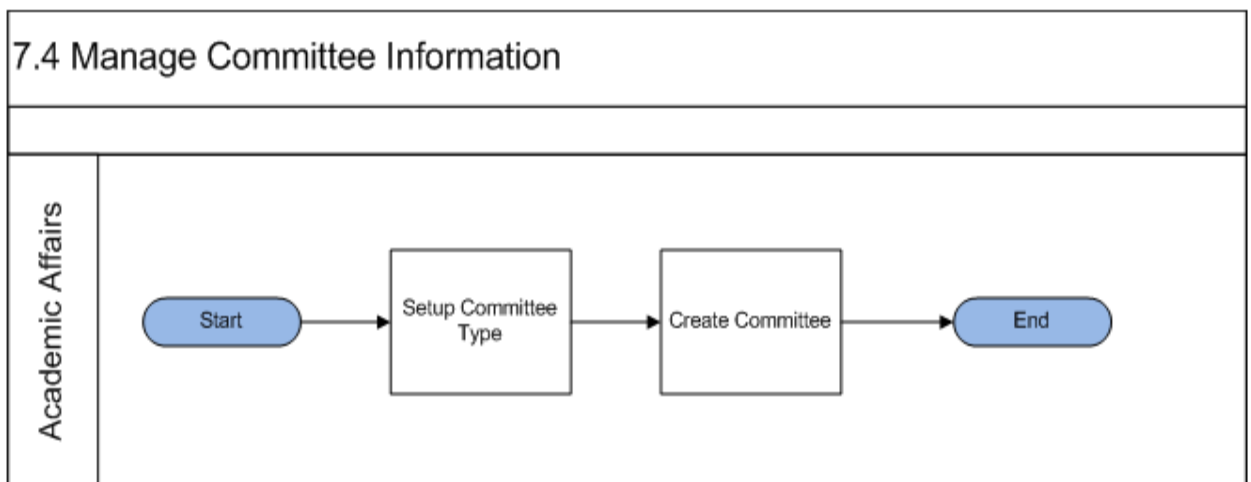
Manage Service Indicators deals with managing and maintaining organizations and committees. In managing organizations there are many phases like creating and maintaining organizations, defining organizations, reviewing organizations and maintaining data load of an organization. While in maintaining committee information, there are many tasks like setup committee type, creating committee, managing committee etc.

#### Business Process Map

##### Manage Organizations



##### Manage Committee Information



# Train the Trainer Modules: Campus Community

## 7.3.2 Manage Organization and Committee Information Main

### A. Manage Organization

#### Organization Table

Go to page: Main Menu ->Campus Community-> Organization ->Create/Maintain Organizations-> Organization Table

External Org ID: 1000008790



**Organization Details** Find | View All First 1 of 1 Last

\*Effective Date: 12/30/1434 \*Status: Active

\*Description: KSAU-1

Long Description: KSAU Org 1

Short Description: KSAU-1 [Formal Description](#)

\*Organization Type: SCHL School

\*Proprietorship: Public

---

**Active Locations** Personalize | Find | View All First 1 of 1 Last

Location	Description	Address	Effective Date	Primary
				<input type="checkbox"/>

Primary Location:  [Locations](#)

---

**Active Contacts** Personalize | Find | View All First 1 of 1 Last

Contact	Name	Type	Job Title	Effective Date	Primary
					<input type="checkbox"/>

Primary Contact:  [Contact Type Preferred](#) [Contacts](#)

---

**Active Departments** Personalize | Find | View All First 1 of 1 Last

Department	Description	Type	Effective Date	Primary
				<input type="checkbox"/>

Primary Department:  [Departments](#)

#### Organization Type

Enter the type of organization (for example BUSN (Business), FNDN (Foundation), SFTP (Student Financials Third Party), NONP (Non-Profit), or SCHL (School) that describes this organization. Values for this field are set up when you define the organization type.

#### Proprietorship

Enter the type of primary owner or funding source (Other, Private, Public, or Religious) of this organization. Values for this field are delivered with the system as translate values. You can modify these translate values.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### **Primary Location**

Click to access the Primary Location Look Up page where you can enter the primary location for the organization. When selected, the information associated with the primary location appears first in the list with the Primary check box selected.

#### **Locations**

Click to access the Location Detail pages where you can enter the organization's locations. All active locations appear in the Active Locations group box.

#### **Primary Contact**

Select a primary contact. When selected, the information associated with the primary contact appears first in the list with the Primary check box selected.

#### **Contact Type Preferred**

Click the Contact Type Preferred button to access the Contact Type Preferred page and enter the contact type.

#### **Contacts**

Click the Contacts button to access the Contact Detail pages where you can enter the contacts for the organization. All active contacts are listed in the Active Contacts group box.

#### **Primary Department**

Enter the primary location for the organization. When selected, the information associated with the primary department appears first in the list with the Primary check box selected.

#### **Departments**

Click the Departments button to access the Department pages where you can view or enter the departments for the organization. All active departments are listed with the Active Departments group box.

#### **SetID**

Enter the setID of the department at your institution that does business with or is responsible for paying the bills from this vendor.

#### **Vendor ID**

Enter the vendor ID, the number or other descriptor that your institution uses for this vendor. Taxpayer ID Enter the taxpayer ID, this vendor's taxpayer identification number.

#### **Organization Locations**

Go to page: Main Menu ->Campus Community-> Organization -> Create/Maintain Organizations-> Organization Locations

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

Org ID: 1000008790 KSAU-1



Primary Location:

Location Find First 1 of 1 Last

Location: 1

---

Location History Find | View All First 1 of 1 Last

Effective Date: 01/28/1435 Status: Active + -

\*Description: Country Side

Short Desc: Country Si

Country: SAU Saudi Arabia

Address: Street 5A  
Riyadh Riyāḍ  
Saudi Arabia [Edit Address](#)

---

Electronic Addresses

Email ID:

URL Address:

EDI Address:

---

Location Phones Personalize | Find | View All First 1 of 1 Last

*Phone Type	Prefix	Phone	Extension	Preferred
-------------	--------	-------	-----------	-----------

#### Location

Displays the number of this location in the list of locations for this organization. The system automatically assigns the next sequential number to each location that you add. You can manually override these numbers on the Organization Table page to rearrange the order of the locations.

#### Country

Enter the country of the location. Labels in the address format for the specified country display so you can add or review the address of this location

#### Edit Address

Click to access the Edit Address page to add or modify the location address for the organization. Enter the address. Click the OK button to return to the Location Detail page where the address is displayed. Additional addresses for this organization are added from the Location Summary page.

#### Email ID

Enter the email address for this location of the organization.

**URL Address** Enter the URL address of the World Wide Web page for this location of the organization.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### EDI Address

Enter the Electronic Data Interchange (EDI) address for this location of the organization.




#### Phone Type

Enter the type of phone number for this location (for example Main, Campus, or Business. Values for this field are delivered with the system as translate values. You can modify these translate values.

#### Preferred

Select to indicate that this is the preferred phone number for the location.

**Department Summary** | **Department Detail**





Org ID: 1000008790 KSAU-1   

Primary Department:

**Department** Find First 1 of 1 Last


Department: 1



**Department History** Find | View All First 1 of 1 Last


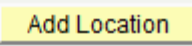
Effective Date: 01/28/1435  Status: Active   


\*Description: KSAU 1- Nurs

Short Desc: KSAU 1- Nu

Department Type: Academic Department 

Contact:   


Location:  1  Country Side 



Address:  Street 5A  
Riyadh Riyāḍ  
Saudi Arabia

**Electronic Addresses**

Email ID:

URL Address:

**Department Phones** Personalize | Find | View All |  First 1 of 1 Last

*Phone Type	Prefix	Phone	Extension	Preferred	
					 

#### Department

Displays the number of this department in the list of departments for this organization. The system automatically assigns the next sequential number to each department that you add. You can manually override these numbers on the Organization Table page to rearrange the order of the departments.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### **Department Type**

Enter the type, either Academic or Administrative, that describes this department. Values for this field are delivered with the system as translate values. You can modify these translate values.

#### **Contact**

Enter the main contact, from the Contact Details page, for this department. Note. You cannot enter a contact for this department unless the contact is entered on the Contact Detail page.

#### **Location**

Enter the location of the main contact, from the Location Detail page, for this department.

#### **Add Contact**

Click to access the Contact Detail page to add a new contact for this department. When you have entered and saved the contact information, the contact appears on the Department Detail page. Warning! You must enter the department data before entering a contact.

#### **Add Location**

Click to access the Location Detail page to add a new location for this department. When you have entered the location, the contact appears on the Location Detail page.

#### **Email ID**

Enter the email address for this department of the organization.

#### **URL Address**

Enter the URL address for the World Wide Web page for this department of the organization.

#### **Phone Type**

Enter the type of phone for this department. Values for this field are delivered with the system as translate values. You can modify these translate values




#### **Preferred**

Select to indicate that this phone number is the preferred phone number to contact this department.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

Contact Summary Contact Detail


Org ID: 1000008790 KSAU-1   


Primary Contact:  
Title:

Contact Find First 1 of 1 Last

Contact: 1


Contact History Find | View All First 1 of 1 Last


Effective Date: 01/28/1435  Status: Active + -

ID: 0064 

\*Contact Name: Aamir Azam Sheikh


Job Title: Admin

Contact Type: PRI  Primary Contact

Department: 1  KSAU 1- Nurs Add Department

Contact Address

Department  Location  Address Type  None

Address:   
Street 5A  
Riyadh Riyāḍ  
Saudi Arabia Add Location

Electronic Addresses

Email ID:

#### Contact

Displays the number of this contact in the list of contacts for this organization. The system automatically assigns the next sequential number to each contact that you add.

#### ID

Enter the ID of this contact person, if the person exists in your database.

#### Contact Name

Enter the name of this contact person. If the person is in your database, the system automatically displays the person's name when you select the ID. If the person is not in your database, you must enter the name manually.

#### Contact Type

Enter the type of contact (for example, Teacher, Principal, Guidance Counselor, or Primary Contact) from the Contact Type Table page. Values for this field are delivered with the system as translate values. You can modify these translate values.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### **Add Department**

Click to access the Department Detail page to add the department for this contact.

#### **Department**

Select to indicate that a department address should be used as the address for the contact.

#### **Location**

Select to indicate that a location should be used as the address for this contact and enter the location.

#### **Address Type**

If the contact is one that has an ID in the system and this ID has one or many addresses, the user can then select an available address type (Business, Home, and so on) for this ID and it should be used as the address for this contact.

#### **None**

Select to indicate that no address is specified for this contact.

#### **Add Location**

Click to access the Location Detail page to add a location for this contact. If you select the Location or Address Type option you must also specify which location or address type to use. Click the Refresh icon to display the address data associated with the option that you select. If the contact has an ID in the system, the Addresses link displays. Click to access the Addresses page where you can add a new address for this ID which is used as the contact address.

#### **Email ID**

Enter the email address for this contact in the organization.

#### **Phone Type**

Enter the type of phone for this contact.

**Values** for this field are delivered with the system as translate values. You can modify these translate values.

#### **Prefix**

Enter the country code that precedes the phone number.

#### **Phone**

Enter the phone number for this contact.

#### **Extension**

Enter the phone extension at which the contact can be contacted.

#### **Preferred**

Select to indicate that this phone number is the preferred phone number for this contact.



## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### ➤ How to "Create/Maintain Organization"?

##### Execution steps:

##### Organization Table

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community-> Organization -> Create/Maintain Organizations-> Organization Table

**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's or click on "Add a New Value" tab to enter new Organization data.

**Step 4:** Enter the following values:

**Effective Date:** Select the appropriate value from the list.

**Description:** Enter the effective date.

**Long Description:** Select the appropriate value from the list

**Short Description:** Enter comments if necessary.

**Organization Type :** Enter organization type

**Proprietorship :** Enter proprietorship type.

**Step 5:** Click "Save". This will update athletic participation information in the system.

##### Organization Locations

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community-> Organization ->Create/Maintain Organizations-> Organization Locations

**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

**Step 4:** It will display Location information of selected record.

**Step 5:** Click on "Location Details" link to add/update Location information.

**Step 6:** Click on "Add" button to add new Location Information.

##### Organization Departments

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community-> Organization -> Create/Maintain Organizations-> Organization Departments

**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

**Step 4:** It will display Department information of selected record.

**Step 5:** Click on "Department Details" link to add/update Department information.

**Step 6:** Click on "Add" button to add new Department Information.

#### **Organization Contacts**

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community-> Organization ->Create/Maintain Organizations-> Organization Contacts

**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

**Step 4:** It will display Contact information of selected record.

**Step 5:** Click on "Contact Details" link to add/update Contact information.

**Step 6:** Click on "Add" button to add new Contact Information.

#### ➤ **How to "Define Organization"?**

**Execution steps:**

#### **Contact Type Table**

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community->Organization ->Define Organization Data-> Contact Type Table

**Step 3:** On the "Find an Existing Value" tab, click "Search" to display the list of existing Contact Types. Click on a search result row to open the page.  
or  
Click on "Add a New Value" tab to enter new Contact Type.

**Step 4:** Enter the following values:

**Effective date :** Enter the effective date.

**Description:** Enter the description of Contact.

**Step 5:** Click "Save".

#### **Ext Org Code Type Table**

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

**Step 2:** Campus Community->Organization -> Define Organization Data-> Ext Org Code Type Table

**Step 3:** On the "Find an Existing Value" tab, click "Search" to display the list of existing Ext Org Code Types. Click on a search result row to open the page.  
or  
Click on "Add a New Value" tab to enter new Ext Org Code Type.

**Step 4:** Enter the following values:

**Effective date:** Enter the effective date.

**Description:** Enter the description of Ext Org.

**Step 5:** Click "Save".

#### **Organization Group table**

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

**Step 2:** Campus Community-> Organization à Define Organization Data-> Organization Group Table

**Step 3:** On the "Find an Existing Value" tab, click "Search" to display the list of existing Organization Group types. Click on a search result row to open the page.  
or  
Click on "Add a New Value" tab to enter new Organization Group type.

**Step 4:** Enter the following values:

**Effective date :** Enter the effective date.

**Description:** Enter the description of organization group.

**Step 5:** Click "Save".

#### ➤ **Review Organization**

#### **Pre-Requisites:**

The following pre-requisites must be fulfilled before updating extracurricular activities information in the system.

- Organization Locations must be set.
- Organization Departments must be set.
- Organization Contacts must be set.
- Organization Groups should exist.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### Execution Steps:

**Business Role: Administrator (User: KS\_ADMIN, Password = "123")**

#### **View Organization Location**

1. Login to system using your credentials
2. Go to page: Campus Community à Organization à Review Organizations->Organization Location Summary
3. On the "Find an Existing Value" tab, click "Search" to display the list of existing Organization Locations. Click on a search result row to open the page.
4. It will display Organization Location Summary

#### **View Organization Department**

5. Login to system using your credentials
6. Go to page: Campus Community à Organization à Review Organizations->Organization Dept. Summary
7. On the "Find an Existing Value" tab, click "Search" to display the list of existing Organization Departments. Click on a search result row to open the page.
8. It will display Organization Department Summary.

#### **View Organization Contacts**

9. Login to system using your credentials
10. Go to page: Campus Community à Organization à Review Organizations->Organization Contacts Summary
11. On the "Find an Existing Value" tab, click "Search" to display the list of existing Organization Contacts. Click on a search result row to open the page.
12. It will display Organization Contacts Summary.

#### **View Organization Groups**

13. Login to system using your credentials
14. Go to page: Campus Community ->Organization -> Review Organizations->Organization Groups Summary
15. On the "Find an Existing Value" tab, click "Search" to display the list of existing Organization Groups. Click on a search result row to open the page.
16. It will display Organization Groups Summary.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### ➤ How to "Manage Organization and Data Load"?

##### Execution steps:

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_ADMIN", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community-> Organization -> Organization DataLoad-> ATP Load External Data

**Step 3:** On the "Find an Existing Value" tab, click "Search" to display existing "Run Control IDs" .Click on a search result row to open the page. Or Click on "Add a New Value" tab to enter new Run Control ID.

**Step 4:** Enter the following values:

**College Data :** Enter the effective date.

**Secondary School Data:** Enter the description of organization group.

**Step 5:** Click "Run" and wait for the process to finish

**Step 6:** To view the process status click on "Process Monitor" link.

#### B. Manage Committee Information

Go to page: Main Menu ->Campus Community->Committees ->Committee Type/Role

**Committee Type/Role**

**Academic Institution:** PSUNV PeopleSoft University

**Committee Type:** UGADMISS

**Committee Description** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Status: Active

\*Description: UG Admissions Committee

Short Description: UG Admiss

Record (Table) Name: RECRUITERS\_VW

**Committee Role** Find | View All First 1 of 1 Last

\*Committee Role: Staff member of Committee

\*Description: Admissions Staff

Short Description: Adm Staff

**Record (Table) Name** Enter the name of the record that contains the types of individuals to make available for assignment to this committee. The selected record provides the prompt list of possible members on the Committee page.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

For example, if you create an Undergraduate Interviews committee, and you select the RECRUITERS\_VW, each time that you create a committee of the Undergraduate Interviews type, you are prompted to select members from the list of recruiters in your system.

#### Committee Role

Committee Role Select the role (for example, chair, co-chair, member, student member, and so on) that should always be part of this committee type. You can add as many roles as necessary.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Go to page: Main Menu ->Campus Community-> Committees -> Manage Committees

The screenshot shows a web application interface for managing committees. At the top, there are two tabs: "Committee" (selected) and "Committee Members". Below the tabs, the "Academic Institution" is set to "PSUNV" (PeopleSoft University) and the "Committee" is set to "ALUMNI". The "Committee Details" section includes a search bar with "Find | View All" and navigation buttons for "First", "1 of 1", and "Last". The form fields are as follows:

- \*Effective Date:** 01/24/1997 (with a calendar icon)
- \*Status:** Active (dropdown menu)
- \*Committee Name:** Alumni Committee (text input)
- \*Committee Type:** ALUMNI (dropdown menu) with a search icon and the text "Alumni Scholarship Committee" below it.
- Description:** Alumni Scholarship Committee (text input)

#### Committee Name

Enter a name for the committee.

#### Committee Type

Select the type of committee, from the Committee Type/Roles page, that describes this committee.

#### For Committee Members

##### Member Number

The number of this member in the list of members for this committee. The system automatically enters the next sequential number for each member that you add. You can override the number manually to reorder the list of committee members.

##### ID

The ID of the individual assigned to this committee. The system displays the individual's name after you select the ID.

##### Role

The role assigned to this individual for this committee.

##### Start Date

The date when the member's participation in this committee is scheduled to begin.

## Train the Trainer Modules: Campus Community

### 7.3.2 Manage Organization and Committee Information Main

#### End Date

The date when the member's participation in this committee is scheduled to end.

#### ➤ How to "Setup Committee Type"?

#### How to "Setup Committee Type"?

##### Execution steps:

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_AAO", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community→ Committees → Committee Type/Role

**Step 3:** On the "Find an Existing Value" tab, click "Search" to display existing "Committee Types/Roles" .Click on a search result row to open the page.

or

Click on "Add a New Value" tab to enter new Committee Type/Role.

**Step 4:** Enter the following values:

**Effective Date :** Enter the effective date.

**Description:** Enter the description of committee.

**Committee Role :** Enter the committee role.

**Description:** Enter the description of committee role.

**Step 5:** Click "Save" .

#### ➤ How to "Create Committee"?

#### How to "Create Committee"?

Following are the minimum requirement to Create Committee:

##### Execution steps:

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_AAO", Password = "123"]

**Step 2:** Go to page: Main Menu ->Campus Community→ Committees → Manage Committees

**Step 3:** On the "Find an Existing Value" tab, click "Search" to display existing "Committees" .Click on a search result row to open the page.

or

Click on "Add a New Value" tab to enter new Committees .

**Step 4:** Enter the following values:

**Effective Date :** Enter the effective date.

**Committee Name:** Enter the name of committee.

**Committee Type :** Select committee type from look up.

**Step 5:** Click "Save" .