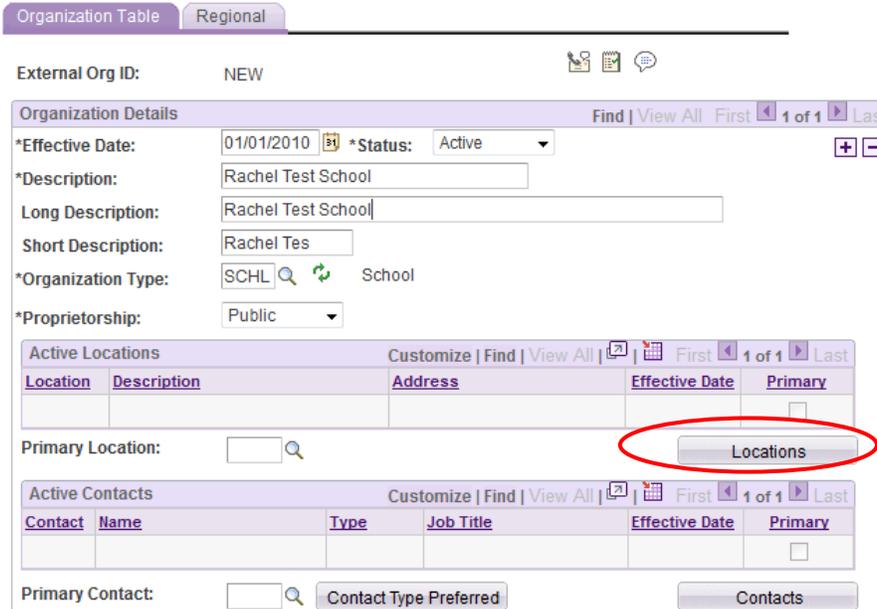


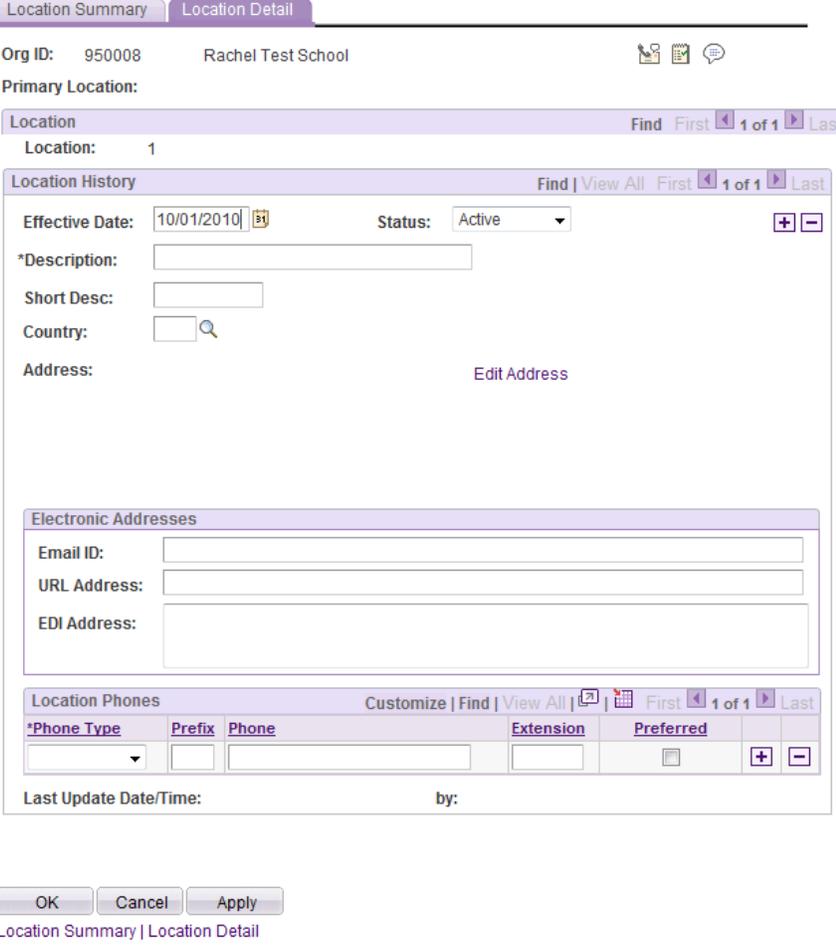
Creating External Organizations

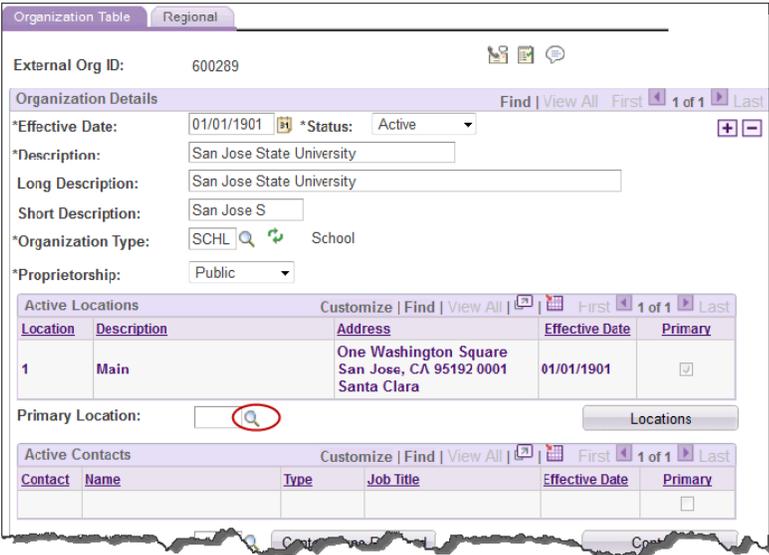
Purpose: Records for organizations such as high schools, colleges or universities, and other external organizations must be entered into the system. For each organization (school) enter the location and the school data.

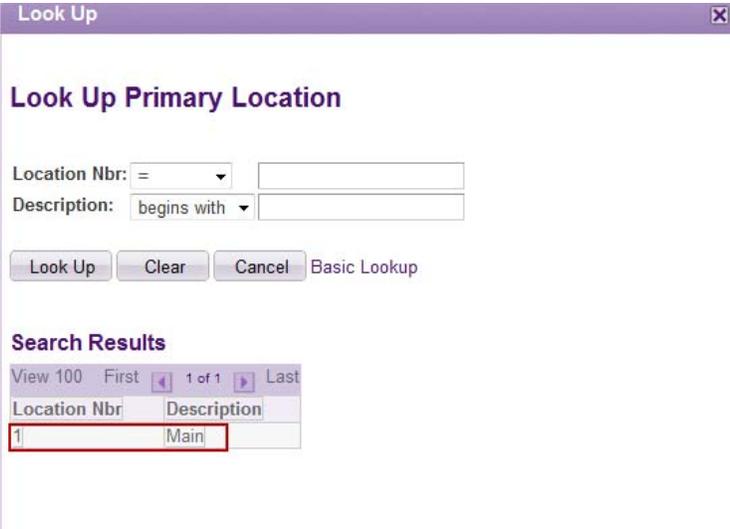
Step	Action
1.	<p>Navigate to the Organization Table page: Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization Table</p> <p>Favorites : Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization Table</p> <p>Organization Table</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <hr/> <p>Maximum number of rows to return (up to 300): <input type="text" value="300"/></p> <p>External Org ID: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p>Search Name: <input type="text" value="begins with"/></p> <p>Organization Type: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p>ATP Code: <input type="text" value="begins with"/></p> <p>FICE Code: <input type="text" value="begins with"/></p> <p>City: <input type="text" value="begins with"/></p> <p>State: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p>Country: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search <input type="button" value="Save Search Criteria"/></p>
2.	Enter search criteria to see if the school already exists.
3.	<p>If the school does not exist, click the Add a New Value tab.</p> <p>Organization Table</p> <p>Find an Existing Value Add a New Value</p> <hr/> <p>External Org ID: <input type="text" value="NEW"/></p> <p><input type="button" value="Add"/></p> <p>Find an Existing Value Add a New Value</p>

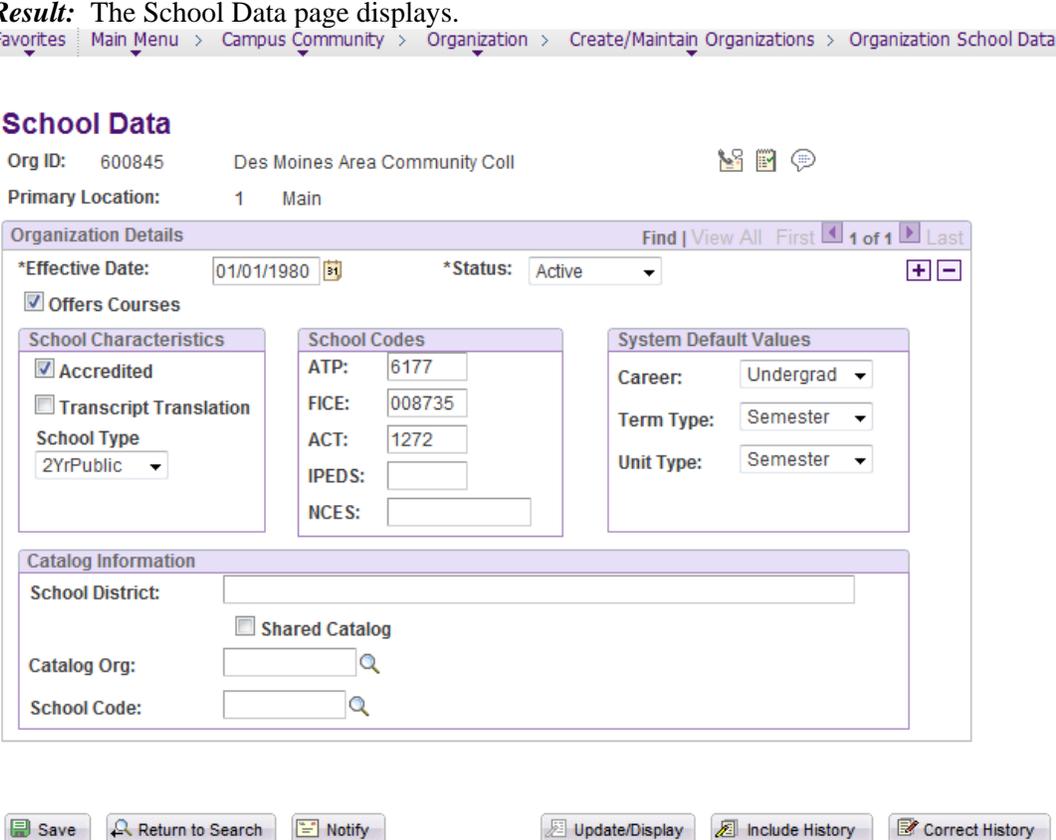
Step	Action																																
4.	<p>An ID number for the new school does not exist; retain the value of NEW as a temporary ID. When all the details required to add the organization's record are completed and saved, the system will automatically assign the next sequential number as the ID number for the new organization record.</p> <p>Click the Add button.</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 10px auto;"> Add </div> <p>Result: The Organization Table displays.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: 90%;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 10px;"> Organization Table Regional </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> External Org ID: NEW    </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Organization Details Find View All First 1 of 1 Last </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> *Effective Date: 10/01/2010  *Status: Active    </div> <div style="margin-bottom: 5px;">*Description: <input style="width: 100%;" type="text"/></div> <div style="margin-bottom: 5px;">Long Description: <input style="width: 100%;" type="text"/></div> <div style="margin-bottom: 5px;">Short Description: <input style="width: 100%;" type="text"/></div> <div style="margin-bottom: 5px;">*Organization Type: SCHL   School</div> <div style="margin-bottom: 5px;">*Proprietorship: Public </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Active Locations Customize Find View All   First 1 of 1 Last </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: left;"> <thead> <tr> <th style="width: 15%;">Location</th> <th style="width: 35%;">Description</th> <th style="width: 30%;">Address</th> <th style="width: 15%;">Effective Date</th> <th style="width: 5%;">Primary</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <div style="margin-top: 5px;"> Primary Location: <input style="width: 50%;" type="text"/>  Locations </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Active Contacts Customize Find View All   First 1 of 1 Last </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: left;"> <thead> <tr> <th style="width: 15%;">Contact</th> <th style="width: 30%;">Name</th> <th style="width: 15%;">Type</th> <th style="width: 20%;">Job Title</th> <th style="width: 15%;">Effective Date</th> <th style="width: 5%;">Primary</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <div style="margin-top: 5px;"> Primary Contact: <input style="width: 50%;" type="text"/>  Contact Type Preferred Contacts </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Active Departments Customize Find View All   First 1 of 1 Last </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: left;"> <thead> <tr> <th style="width: 15%;">Department</th> <th style="width: 35%;">Description</th> <th style="width: 15%;">Type</th> <th style="width: 15%;">Effective Date</th> <th style="width: 5%;">Primary</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <div style="margin-top: 5px;"> Primary Department: <input style="width: 50%;" type="text"/>  Departments </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <div style="border-bottom: 1px solid #ccc; margin-bottom: 5px; padding-bottom: 5px;"> Vendor Information </div> <div style="margin-bottom: 5px;">SetID: <input style="width: 50%;" type="text"/></div> <div style="margin-bottom: 5px;">Vendor ID: <input style="width: 50%;" type="text"/></div> <div style="margin-bottom: 5px;">Taxpayer ID: <input style="width: 50%;" type="text"/></div> </div> <div style="margin-top: 10px;"> Last Update Date/Time: <input style="width: 100%;" type="text"/> by: <input style="width: 100%;" type="text"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="display: flex; gap: 10px;">  Save  Notify </div> <div style="display: flex; gap: 10px;">  Add  Update/Display  Include History  Correct History </div> </div> </div>	Location	Description	Address	Effective Date	Primary					<input type="checkbox"/>	Contact	Name	Type	Job Title	Effective Date	Primary						<input type="checkbox"/>	Department	Description	Type	Effective Date	Primary					<input type="checkbox"/>
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				<input type="checkbox"/>																													

Step	Action
5.	<p>On the Organization Table page complete the following:</p> <ul style="list-style-type: none"> • Effective Date – Enter 01/01/1901 • Status – Select Active • Description – Enter the school name (e.g. La Blue Univ of Economics). 30 char limit Use common abbreviations: University = Univ, College = Coll, Academy = Acad, Technology = Tech • Long Description – Use the TAB key to auto-populate this field. 50 char limit • Short Description – Use the TAB key to auto-populate this field. (e.g. La Blue). 12 char limit. • Organizational Type – Select School. School is the default and the only value we will use at this time. Note: Other types may be used by other functional areas. • Proprietorship – Select Public or Private.
6.	<p>Since this is a new school, the location must be added. Click the Locations button.</p>  <p>The screenshot shows the 'Organization Table' interface with the 'Regional' tab selected. The 'Organization Details' section includes fields for Effective Date (01/01/2010), Status (Active), Description (Rachel Test School), Long Description (Rachel Test School), Short Description (Rachel Tes), Organization Type (SCHL School), and Proprietorship (Public). Below this is the 'Active Locations' section with a table header: Location, Description, Address, Effective Date, Primary. A 'Locations' button is circled in red. At the bottom, there is an 'Active Contacts' section with a table header: Contact, Name, Type, Job Title, Effective Date, Primary, and a 'Contacts' button.</p> <p>Result: The <i>Location Summary</i> tab displays.</p>

Step	Action
7.	<p>Click the <i>Location Detail</i> tab.</p>  <p>Complete the following:</p> <ul style="list-style-type: none"> • Effective Date – Enter 01/01/1901 • Description – Enter MAIN • Country – Select the appropriate country for the school

Step	Action
8.	<p>Click the Edit Address link.</p> <p><i>Result:</i> The Edit Address page displays.</p> <p>Edit Address</p> <p>Country: United States Change Country</p> <p>Address 1: <input type="text"/></p> <p>Address 2: <input type="text"/></p> <p>Address 3: <input type="text"/></p> <p>City: <input type="text"/> State: <input type="text"/>  Postal: <input type="text"/></p> <p>County: <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> <p><input type="checkbox"/> Override Address Verification</p>
9.	<p>Enter the address information if you have it, otherwise enter the city, state, and/or province, if applicable. Click the OK button.</p> <p><i>Result:</i> The address populates on the <i>Location Detail</i> tab.</p>
10.	<p>Click the OK button.</p> <p><i>Result:</i> The location populates on the Organization Table.</p>
11.	<p>Click the Save button.</p>
12.	<p>The primary location must be entered for the Data Warehouse. Click the Primary Location look-up icon.</p> 

Step	Action
13.	<p>Select 1 (Main).</p> 
14.	<p>Click the Save button.</p> <p>Result: The new school has been saved and a new organization ID has been assigned.</p>
15.	<p>Now that you have created the External Org ID, you must add School Data. Navigate to Organization School Data: Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization School Data</p> 

Step	Action
16.	<p>Enter the External Org Id. Click the Search button.</p> <p>Result: The School Data page displays.</p> 
17.	<p>Complete the following:</p> <ul style="list-style-type: none"> • Effective Date – Enter 01/01/1901 • Offers Courses – Ensure the checkbox is selected • Accredited – Ensure the checkbox is selected • School Type – Select the appropriate school type • ATP – Enter ATP code, if known • FICE – Enter FICE code, if known • ACT – Enter ACT code, if known
18.	Click the Save button.