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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Navigate to the <strong>Organization Table</strong> page: Main Menu › Campus Community › Organization › Create/Maintain Organizations › Organization Table</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Organization Table" /></td>
</tr>
<tr>
<td>2.</td>
<td>Enter search criteria to see if the school already exists.</td>
</tr>
<tr>
<td>3.</td>
<td>If the school does not exist, click the <strong>Add a New Value</strong> tab.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>4.</td>
<td>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. Click the <strong>Add</strong> button.</td>
</tr>
</tbody>
</table>

**Result:** The **Organization Table** displays.
## Job Aid – Creating External Organizations

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5.   | On the **Organization Table** page complete the following:  
  - **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.   | Since this is a new school, the location must be added. Click the **Locations** button.  
  ![Organization Table](image)  
  **Result:** The **Location Summary** tab displays.
### Step 7

**Action:**

Click the *Location Detail* tab.

---

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Enter 01/01/1901</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter MAIN</td>
</tr>
<tr>
<td>Country</td>
<td>Select the appropriate country for the school</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 8.   | Click the **Edit Address** link.  
*Result:* The Edit Address page displays. |
| 9.   | Enter the address information if you have it, otherwise enter the city, state, and/or province, if applicable. Click the **OK** button.  
*Result:* The address populates on the **Location Detail** tab. |
| 10.  | Click the **OK** button.  
*Result:* The location populates on the Organization Table. |
| 11.  | Click the **Save** button. |
| 12.  | The primary location must be entered for the Data Warehouse.  
Click the **Primary Location look-up icon**. |
### Step 13

Select **1 (Main)**.

![Look Up Primary Location](image)

**Result:** The new school has been saved and a new organization ID has been assigned.

### Step 14

Click the **Save** button.

### Step 15

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
### Step 16

Enter the External Org Id. Click the **Search** button.

**Result:** The School Data page displays.

<table>
<thead>
<tr>
<th>School Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org ID: 600845</td>
</tr>
<tr>
<td>Primary Location:</td>
</tr>
</tbody>
</table>

- **Effective Date:** 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

### Step 17

Complete the following:

- **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

### Step 18

Click the **Save** button.