

## **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.	Navigate to the <b>Organization Table</b> page: <b>Main Menu &gt; Campus Community &gt;</b> <b>Organization &gt; Create/Maintain Organizations &gt; Organization Table</b>
	Favorites Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization Table
	Organization Table
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value Add a New Value
	Maximum number of rows to return (up to 300): 300
	External Org ID: begins with V
	Search Name: begins with  Organization Type: begins with
	ATP Code: begins with $\checkmark$
	FICE Code: begins with V
	City: begins with 🗸
	State: begins with 👻
	Country: begins with
	Include History Correct History Case Sensitive
	Search Clear Basic Search 📳 Save Search Criteria
2.	Enter search criteria to see if the school already exists.
3.	If the school does not exist, click the Add a New Value tab.
	Organization Table
	Find an Existing Value Add a New Value
	External Org ID: NEW
	Add
	Find an Existing Value Add a New Value



Step	Action
4.	An ID number for the new school does not exist; retain the value of <b>NEW</b> 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 <b>Add</b> button. Add <i>Result:</i> The <b>Organization Table</b> displays.
	Organization Table Regional
	External Org ID: NEW 🔡 💬
	Organization Details Find   View All First 4 of 1 Last
	*Effective Date: 10/01/2010 📴 *Status: Active -
	*Description:
	Long Description:
	Short Description:
	*Organization Type: SCHL 🔍 🍄 School
	*Proprietorship: Public -
	Active Locations Customize   Find   View All   🔄   🔠 First 🚺 1 of 1 🕨 Last
	Location Description Address Effective Date Primary
	Primary Location: Q Locations
	Active Contacts Customize   Find   View All   🖓   🔠 First 🚺 1 of 1 🕨 Last
	Contact Name Type Job Title Effective Date Primary
	Primary Contact: Contact Type Preferred Contacts
	Active Departments Customize   Find   View All   🔄   🔠 First 🚺 1 of 1 🕨 Last
	Department         Description         Type         Effective Date         Primary
	Primary Department:
	Vandar Information
	Setto:
	Vendor ID:
	Last Update Date/Time: by:
	Save Notify Ref. Add Update/Display Ref. Include History Correct History



Step	Action
5.	On the <b>Organization Table</b> page complete the following:
	<ul> <li>Effective Date – Enter 01/01/1901</li> <li>Status – Select Active</li> <li>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</li> <li>Long Description – Use the TAB key to auto-populate this field. 50 char limit</li> <li>Short Description – Use the TAB key to auto-populate this field. (e.g. La Blue). 12 char limit.</li> <li>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.</li> <li>Proprietorship – Select Public or Private.</li> </ul>
6.	Since this is a new school, the location must be added. Click the Locations button. Organization Table       Regional         External Org ID:       NEW         Organization Details       Find   View All First 1 of 1   Last         *Effective Date:       01/01/2010   S * Status: Active •         *Description:       Rachel Test School         Long Description:       Rachel Test School         Short Description:       Rachel Test         *Organization Type:       SCHL • School         *Proprietorship:       Public •         Active Locations       Customize   Find   View All   D   First 1 of 1   Last
	Location       Description       Address       Effective Date       Primary         Primary Location:       Q       Locations       Locations         Active Contacts       Customize   Find   View All   2 ]       First I of 1 Last         Contact Name       Type       Job Title       Effective Date       Primary         Primary Contact:       Q       Contact Type Preferred       Contacts         Description       Contact Type Preferred       Contacts



Step	Action	
7.	Click the Location Detail tab.	
	Location Summary Location Detail	
	Org ID: 950008 Rachel Test School 🕍 🖼 🧭	
	Primary Location:	
	Location Find First 1 of 1 Last	
	Location History Find   View All First 1 of 1 Last	
	Effective Date: 10/01/2010 3 Status: Active -	
	*Description:	
	Short Desc:	
	Country:	
	Address: Edit Address	
	Electronic Addresses	
	Email ID:	
	URL Address:	
	EDI Address:	
	Customize   Find   View All   [22]   [23] First [20] 1 of 1 [22] Last     Phone Type Prefix Phone Extension Preferred	
	Last Update Date/Time: by:	
	OK Cancel Apply	🍫 Refresh
	Location Summary   Location Detail	
	Complete the following:	
	• Effective Date – Enter 01/01/1901	
	• <b>Description</b> – Enter MAIN	
	• <b>Country</b> – Select the appropriate country for the school	



Step	Action
8.	Click the Edit Address link.
	Result: The Edit Address page displays.
	Edit Address
	Country: United States Change Country
	Address 1:
	Address 2:
	Address 3:
	City: State: Q Postal:
	County:
	OK Cancel
	Override Address Verification
9.	Enter the address information if you have it, otherwise enter the city, state, and/or province, if applicable. Click the <b>OK</b> button.
10	Click the <b>OK</b> button
10.	<i>Result:</i> 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 <b>Primary Location look-up icon.</b>
	Organization Table Regional
	External Org ID: 600289
	Organization Details     Find   View All First I of 1 II Last       *Effective Date:     01/01/1901 II *Status: Active
	*Description: San Jose State University
	Long Description: San Jose State University Short Description: San Jose S
	*Organization Type: SCHL Q & School
	*Proprietorship: Public -
	Active Locations     Customize   Find   View All   I   Hirst I 1 of 1     Last       Location     Description     Address     Effective Date     Primary
	1     Main     One Washington Square San Jose, CA 95192 0001 Santa Clara     01/01/1901
	Primary Location: Locations
	Active Contacts Customize   Find   View All   ] First 1 of 1 Last Contact Name Type Interview Date Fiftertive
	Landress and Colores Colores Contraction



Step	Action
13.	Select 1 (Main).
	Look Up X
	Location Nbr: =  Description: begins with  Look Up Clear Cancel Basic Lookup Search Results View 100 First 1 of 1 Last Location Nbr Description Main
14.	Click the <b>Save</b> button.
	<i>Result:</i> The new school has been saved and a new organization ID has been assigned.
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 Favorites Main Menu > Campus Community > Organization > Create/Maintain Organization School Data
	Organization School Data
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value
	Maximum number of rows to return (up to 300): 300 Search by: External Org ID - begins with Include History Correct History
	Search Advanced Search



Step	Action
16.	Enter the External Org Id. Click the Search button.
16.	Enter the External Org Id. Click the Search button. Result: The School Data page displays. Favorites Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization School Data School Data Org ID: 600845 Des Moines Area Community Coll Primary Location: 1 Main Organization Details *Effective Date: 01/01/1980 * *Status: Active • • • • Ø Ofters Courses School Characteristics School Characteristics School Characteristics School Type 2YrPublic • Intervention Catalog Information
	School District:
	Save Return to Search ENotify Dipdate/Display Include History Correct History
17.	<ul> <li>Complete the following:</li> <li>Effective Date – Enter 01/01/1901</li> <li>Offers Courses – Ensure the checkbox is selected</li> <li>Accredited – Ensure the checkbox is selected</li> <li>School Type – Select the appropriate school type</li> <li>ATP – Enter ATP code, if known</li> <li>FICE – Enter FICE code, if known</li> <li>ACT – Enter ACT code, if known</li> </ul>
18.	Click the <b>Save</b> button.