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# Oracle's PeopleSoft 8.9 MP1 Student Financials Changes and Updates for CS Bundle #9

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April 2007

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Changes and Updates for CS Bundle #9

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# PeopleSoft Student Financials Documentation Updates for CS Bundle #9

**Note.** This document is an update to the *PeopleSoft Enterprise Student Financials 8.9 PeopleBook*. It describes the Product Update ID # 656265 that was posted to Customer Connection in April 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document provides information related to updates and fixes delivered with CS Bundle #9. Specifically, it provides information about:

- Setting Up adjustment calendars.
- Using Equation Engine to define tuition calculation equations.

## See Also

*PeopleSoft Enterprise 8.9 Student Financial PeopleBook*, "Setting Up Tuition Controls, Criteria, Equations, and Waivers". Setting Up Adjustment Calendars.

*PeopleSoft Enterprise 8.9 Student Financials PeopleBook*, "Setting Up Tuition Controls, Criteria, Equations, and Waivers". Using Equation Engine to Define Tuition Calculation Equations.

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## Setting Up Adjustment Calendars

This section provides an overview of the adjustment processing to assist you in writing your equations. The scenarios in this section are calculating the Term Fee by Term and Adjusting by Term.

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## Understanding Adjustment Calendars

The logic for term fee calculations and adjustment for each student is:

- The student enrollment record contains all the add/drop transactions. When a student adds or drops a class, Tuition Calculation records various fields from the enrolment record in a temporary table. The temporary table references the add and drop dates as the transaction date.
- When dropping a class, Tuition Calculation calculates the drop costs by comparing the amount before the drop to the amount after the drop. Tuition Calculation then applies the appropriate adjustment calendar percentage.

## Calculating the Term Fee by Term and Adjusting By Term Scenarios

The following scenarios are providing examples of the tuition calculation temporary table after a student initially enrolls in 4 classes and then:

- Drops one class.
- Adds an additional class.
- Drops two classes on the same day, with the same reason.
- Drops two classes on the same day, with two different reasons.

The Term Fee is assessed through an equation and is charged by Term and Adjusted by Term. Refer to the section Using Equation Engine to Define Tuition Calculation Equations to see the sample equation, SFTDTFTRMTRM (Charge by Term, Adjust by Term).

Scenario 1: On 1 January, 2007 the student enrolled in 4 classes @100 per unit. Each class is 3 billing unit therefore the total billing units = 12 and the total amount \$1200, as shown in the following examples:

Class_nb	Stdnt_enrl_status	Enrl_add_dt	Enrl_drop_dt	Enrol_actn_rsn_last
1001	E	01/01/2007		
1002	E	01/01/2007		
1003	E	01/01/2007		
1004	E	01/01/2007		

The following table lists the transaction in the Tuition Calculation temporary table after initial enrollment:

Transaction Date	Amount	Difference	Drop Date	Reason	Refund%	Drop Cost
01/01/2007	\$1200.00					

Student Balance \$1200.00

Scenario 2: On 1 January, 2007 the student initially enrolled in 4 classes. Then on 2 January, 2007 the student drops one class:

Class_nbr	Stdnt_enrl_status	Enrl_add_dt	Enrl_drop_dt	Enrol_actn_rsn_last
1001	D	01/01/2007	01/02/2007	SDRP
1002	E	01/01/2007		
1003	E	01/01/2007		
1004	E	01/01/2007		

The following table lists the transactions in the Tuition Calauction temporary table after the initial enrollment and dropping one class:

Transaction Date	Amount	Difference	Drop Date	Reason	Refund %	Drop Cost
01/01/2007	\$1200.00					
01/02/2007	\$900.00	\$300.00	01/02/2007	SDRP	80%	\$300* (100% - 80%) = 60

Student Balance: \$900.00 + \$60 = \$960

Scenario 3: On 1 January, 2007 the student initially enrolled in 4 classes. On 2 January, 2007 the student dropped and on 3 January, 2007 the student adds an additional class:

Class_nbr	Stdnt_enrl_status	Enrl_add_dt	Enrl_drop_dt	Enrol_actn_rsn_last
1001	D	01/01/2007	01/02/2007	SDRP
1002	E	01/01/2007		
1003	E	01/01/2007		
1004	E	01/01/2007		
1005	E	01/03/2007		

The following table lists the transactions in the Tuition Calculation temporary table after initial enrollment, dropping one class and adding one class:

Transaction Date	Amount	Difference	Drop Date	Reason	Refund %	Drop Cost
01/01/2007	\$1200.00					
01/02/2007	\$900.00	300.00	01/02/2007	SDRP	80%	\$300* (100% - 80%) = 60
01/03/2007	\$1200.00					

**Note.** In this example the drop costs of \$1200.00 on January 03, 2007 is not calculated on an added class.

Student balance; \$1200 + \$60.00 = \$1260.00

Scenario 4. On 1 January, 2007 the student initially enrolled in 4 classes. Then on 1 January, 2007 the student drops two classes with same reason, on the same day.

Class_nbr	Stdnt_enrl_status	Enrl_add_dt	Enrl_drop_dt	Enrol_actn_rsn_last
1001	D	01/01/2007	01/02/2007	SDRP
1002	D	01/01/2007	01/02/2007	SDRP
1003	E	01/01/2007		
1004	E	01/01/2007		

The following table lists the transactions in the Tuition Calculation temporary table after the initial enrollment and dropping two classes with same reason, on the same day.

Transaction Date	Amount	Difference	Drop Date	Reason	Refund%	Drop Cost
01/01/2007	\$1200.00					
01/02/2007	\$600.00	\$600.00	01/02/2007	SDRP	80%	\$600 (100%-80%) = \$120.00

Student balance: \$600.00 + \$120.00 = \$720.00

Scenario 5. On 1 January, 2007 the student initially enrolled in 4 classes. Then on 2 January, 2007 the student drops two classes with two different reasons.

Student drops two classes with different reasons on the same day.

Class_nbr	Stdnt_enrl_status	Enrl_add_dt	Enrl_drop_dt	Enrol_actn_rsn_last
1001	D	01/01/2007	01/02/2007	SDRP
1002	D	01/01/2007	01/02/2007	CANC
1003	E	01/01/2007		
1004	E	01/01/2007		

The following table lists the transactions in the Tuition Calculation temporary table after the initial enrollment and dropping two classes with two different reasons on the same day:

Transaction Date	Amount	Difference	Drop Date	Reason	Refund%	Drop Cost
01/01/2007	\$1200.00					
01/02/2007	\$\$900.00*	\$300.00	01/02/2007	CANC	90%	\$300* (100% - 90%) = 30
01/02/2007	\$600.00	\$300.00	01/02/2007	SDRP	80%	\$300* (100% - 80%) = 60.00

Student balance:  $\$600.00 + \$30.00 + \$60.00 = \$690.00$

When a student drops two classes with two different reasons on the same day, the temporary table is inserted alphabetically by Reason and each class is calculated separately. The first amount is calculated by only noting that one class has been dropped. The second amount is calculated by using the second class that has been dropped by the student.

If the adjustment calendar is by session start date, the session code is taken into account similar to the reason.

During withdrawal processing, the student's enrollment record, for enrolled classes, will have the drop date equal the last attendance date. Therefore the transaction date will be the last attendance date.

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## Using Equation Engine to Define Tuition Calculation Equations

This section discusses the changes to:

- Global variables
- Viewing delivered equations
- Viewing equation information

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### Changes to Global Variables

The following SF Global Variables are now available to calculate: adjustments, course fees, course list fees and, class fees. The new Global Variables use fields from the Tuition Calculation temporary table, which originates from the STDNT\_ENRL\_ or CLASS\_TBL.

The new SF Global Variables are:

- Session\_code
- Class\_nbr (class number)
- Crse\_id (course id)
- Enrl\_drop\_dt (enrollment drop date)
- Enrol\_actn\_rsn\_last (enrolment action reason last)
- Last\_drop\_tm\_stmp (last droptime stamp)

The existing SF Global Variables are:

- Institution
- Business\_unit
- Acad\_career (Academic Career)
- STRM (Term)
- Emplid

- Stdnt\_car\_nbr (Student Career Number)
- Billing\_career)
- A\_amount
- A\_select (yes/no flag)

## Viewing Delivered Equations

There are ten new equations that can be accessed using the Equation Engine Search page.

Equation Name	Description
SFTDTFTRMTRM	Term Fee Charge by Term Adjust by Term
SFTDTFTRMSES	Term Fee Charge by Term Adjust by Session
SFTDTFTRMCLS	Term Fee Charge by Term Adjust by Class
SFTDTFSESTRM	Term Fee Charge by Session Adjust by Term
SFTDTFSESCLS	Term Fee Charge by Session Adjust by Class
SFTDCLSTRM	Term Fee Charge by Class Adjust by Term
SFTDCLASSNBR	Class Fee A_Amount
SFTDCLSSEL	Class Fee A_Select
SFTDCOURSEID	Course ID A_Amount
SFTDCLSWVR	Course Fee A_Amount Negative

## Viewing Equation Information

This sample equation calculates the term fee by Term, Adjust by Term. To determine the enrolled classes on a specific date, tuition calculation looks at the temporary table and, for each row, the equation is called and compares the global variables from the temporary table to the student's enrollment. Refer to Understanding the Adjustment Calendar section for logic on the term fee and adjustment calculation for each student.

## Page Used to Access the View Equation Information

Page Name	Object Name	Navigation	Usage
Equation Dtl	EQUATION_TBL	Setup SACR, Common Definitions, Equation Engine, Equation Dtl	View information about equations in Equation Engine.

## Accessing the View Equation Information

Access the SFTDTFTRMTRM equation.

Equation Tbl **Equation Dtl**

**Equation Name:** SFTDTFTRMTRM

**Effective Date:** 01/01/1900

**Equation Edit Function:**

Sel	Line	Equation Keyword	Operand Type	Operand	Comment	
<input type="checkbox"/>	1	Skip				+ -
<input type="checkbox"/>	2	Message	String	Running SFTDTFTRMTRM		+ -
<input type="checkbox"/>	3	End Message				+ -
<input type="checkbox"/>	4	Assign	Local	FOUND_STDNT_CAR_TEF		+ -
<input type="checkbox"/>	5		Number	0.00000		+ -
<input type="checkbox"/>	6	End Assign				+ -
<input type="checkbox"/>	7	Find First	Local	FOUND_STDNT_CAR_TEF		+ -
<input type="checkbox"/>	8		Table	STDNT_CAR_TERM		+ -
<input type="checkbox"/>	9		Global EC	EMPLID		+ -
<input type="checkbox"/>	10		Global EC	ACAD_CAREER		+ -
<input type="checkbox"/>	11		Global EC	INSTITUTION		+ -
<input type="checkbox"/>	12		Global EC	STRM		+ -
<input type="checkbox"/>	13	End Find				+ -
<input type="checkbox"/>	14	If				+ -
<input type="checkbox"/>	15		Local	FOUND_STDNT_CAR_TEF		+ -
<input type="checkbox"/>	16	Then				+ -
<input type="checkbox"/>	17	Assign	Local	FOUND_STDNT_ENRL		+ -
<input type="checkbox"/>	18		Number	0.00000		+ -

Equation Dtl page (1 of 6) (SFTDTFTRMTRM)

<input type="checkbox"/>	19	End Assign				+ -
<input type="checkbox"/>	20	Assign	Local	CLASS_NBR		+ -
<input type="checkbox"/>	21		Number	0.00000		+ -
<input type="checkbox"/>	22	End Assign				+ -
<input type="checkbox"/>	23	Find First	Local	FOUND_STDNT_ENRL		+ -
<input type="checkbox"/>	24		Table	STDNT_ENRL		+ -
<input type="checkbox"/>	25		Global EC	EMPLID		+ -
<input type="checkbox"/>	26		Global EC	ACAD_CAREER		+ -
<input type="checkbox"/>	27		Global EC	INSTITUTION		+ -
<input type="checkbox"/>	28		Global EC	STRM		+ -
<input type="checkbox"/>	29		Local GT	CLASS_NBR		+ -
<input type="checkbox"/>	30	End Find				+ -
<input type="checkbox"/>	31	Assign	Global	A_AMOUNT		+ -
<input type="checkbox"/>	32		Number	0.00000		+ -
<input type="checkbox"/>	33	End Assign				+ -
<input type="checkbox"/>	34	Loop				+ -
<input type="checkbox"/>	35	If				+ -
<input type="checkbox"/>	36	Not				+ -

Equation Dtl page (2 of 6) (SFTDTFTRMTRM)

37	Local	FOUND_STDNT_ENRL		
38	Then			
39	Exit Loop			
40	End If			
41	If			
42	(			
43	Table	STDNT_ENRL		
44	Field	STDNT_ENRL_STATUS		
45	=			
46	Value	E		
47	And			
48	(			
49	Table	STDNT_CAR_TERM		
50	Field	LAST_DATE_ATTENDED		
51	=			
52	String			
53	Or			
54	Global	ENRL_DROP_DT		
55	<			

Equation Dtl page (3 of 6) (SFTDTFTRMTRM)

56	Table	STDNT_CAR_TERM		
57	Field	LAST_DATE_ATTENDED		
58	)			
59	)			
60	Or			
61	(			
62	Global	ENRL_DROP_DT		
63	<			
64	Table	STDNT_ENRL		
65	Field	ENRL_DROP_DT		
66	)			
67	Or			
68	(			
69	Global	ENRL_DROP_DT		
70	=			
71	Table	STDNT_ENRL		
72	Field	ENRL_DROP_DT		
73	And			
74	Global	ENRL_ACTN_RSN_LAST		
75	<>			
76	Table	STDNT_CAR_TERM		
77	Field	WITHDRAW_REASON		

Equation Dtl page (4 of 6) (SFTDTFTRMTRM)

