

PeopleSoft Enterprise - 8SP1 Bundle 20 Early Release Notes

Campus Solutions Student Administration

* This document contains bundle listing as of this date. List of incidents is subject to change.

Target Post Date	8/24/2007			
*Listing "as of" Date	7/23/2007			
Product	Category	Incident ID	Reported Problem Description	Problem Description
AA	Analysis Database	1587413001	The COBOL process SRPCTDRB is not populating the ADB for bigger groups of students	When a Transcript request is created by the SRTSRQST AppEngine process for a large selection of students and use that Transcript Request number to kick off the COBOL process SRPCTDRB, we see that all the students in the selection log of AppEngine are not processed by the COBOL.
AV	GP Entry	671303001	Tribute information from pledge does not carry over to pledge payments.	When entering pledge payments the gift entry page does not automatically apply the tribute information from the pledge to the pledge payments. This requires users to either already know that the payments should have tributes or to look up every pledge to see if it has tributes before applying payments. Ideally, tribute information from a pledge would automatically be attributed to any associated pledge payments.
AV	GP Entry	1652881001	CR credit card process needs better audit trail	The CR credit card process would allow the user to better monitor the results of each EP transaction with an online audit display and a report that can be used to trace each time a transaction is processed.
AV	Prospect Manager	1309090001	Action Summary Detail page does not display the action description	The action description does not display on the Action Summary - Action Detail page. Users must click on the Edit Action button in order to view the description. Would like to have the action description included on the Action Detail page.

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AV	Prospect Manager	1466278001	Action Details should be like Gift Details	<p>It would be great if the Action details page (off the Action Summary) looked like the new Gift details page (data sections instead of links to further info). This would reduce the number of clicks to get to information, and facilitate Printing an Action on one page, which is a much-requested feature from our users. If there is an associated Contact Report for the action it would be great if there was a print-friendly version that expanded the page enough to print the whole Report along with the action details.</p>
AV	Prospect Manager	1572589001	Can't see the Pledge information of the Action Result from the Action Detail Page	<p>When we click on Detail push button of an Action, then Ask Information push button, where the Action Result is linked to a Pledge, we can't see the Pledge Date and Pledge Amount. As oppose to seeing this information when we click on Edit Action push button. See the example here attached.</p> <p>It works in demo because you created a new pledge where its Effective Date is less than 60 days old. You would need to test it with an old pledge already linked to the ASK. The problem is because it's using the same view (PS_AV_PLDG_REC_VW) for to different purposes:</p> <ul style="list-style-type: none"> - This view is designed to let you link the less than 60 days old pledges to the ASK only. So all pledges older than 60 days won't show up if you select the view. - Now it uses the same view when it's time to show the Pledge Effective Date and Pledge Amount linked to the action. So of course, this information is not shown because it's more than 60 days old.

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AV	Prospect Manager	1647324001	Planned Giving Profile has hardcoded 'Bequest' in its view	The Planned Giving components have a hardcoded view (AV_PG_B_VW) which hardcodes the 'Bequest' value into the grid. The field BQST_NAME should replace the hardcoded value.
AV	Prospect Manager	1670128001	Mass Actions redesign is not including External Organizations in MYPROS workset	MYPROS assignments for external orgs from Mass Actions are not occurring. All assignees including Responsible Person, Solicitor and Others Assigned should have the external orgs added to MYPROS when Mass Action is created. It is working for people.
FA	Auth/Disburse	1669814001	ACG Disbursements can not be reversed if there is no grant eligibility record.	If a student is awarded and disbursed an ACG award, then is found to be ineligible and the award is reduced, the disbursement authorization process will not process the student if the current eligibility status is not 'Eligible'.
FA	Auth/Disburse	1673573003	Unable to disburse ACG students 1st year never attended	Unable to disburse ACG students 1st year never attended. It gives the following error: Student's HERA Academic Level on Item Type FA does not match ASG eligibility table.
FA	COD Grants	1674760001	Incorrect parent child relationships for sfa_asg_elig grouping	In testing the changes for 07-08, I wanted to see if I could wipe out the eligibility data I created and start fresh since once there is an eligibility record for the grant type for the aid yr and term it will not update it. So, using app designer, I opened the sfa_aasg_eligxxx records to see how they were related so I could determine what order they needed to be deleted. The record sfa_asg_eligdtl is defined as the parent record for the elig set. However, in the record properties, its parent record is defined as itself so if you look at the properties you can only close it not click OK. Then the sfa_asg_elig record happens to have the lesser number of keys so I would have thought it was the parent not eligdtl.

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FA	COD Grants	1676787001	Students awarded ACG1 with NSLDS level U0 - freshman never attended will fail origination.	When running origination for all the ACG/Smart records that have been awarded and have eligibility records in 07-08 a large number of students failed origination. The reason they failed is that they are freshman - never previously attended. That makes their NSLDS academic level U0. However, on the item type set up for ACG1 for 07-08 only one academic level entry is possible and I have chosen first year. It turns out that the ps_aggr_lvl_xref table translates the first year to be an sfa_asg_acad_level = 1 (=U1 nslds) and the students who are U0 are not considered eligible.
FA	FA Term	1672662001	Online FA Term throws user out of application	Online FA Term throws user out of application if Build button pushed on row other than top row. A very similar problem was reported on 8.9 and 9.0 and fixed in CS 8.9 Bundle #10 and CS 9 Bundle #3 (1494652000). Now it appears to be occurring on 8 SP1.
FA	Pkg - Award Entry	1676375001	Regs 4 (07-08) ACG/SMART functionality impacting awards for 06/07.	When validating an ACG/SMART award for 06/07 the award is cancelled with an error message related to HERA Acad level, etc. Because the user can't create the ASG eligibility record in 2006-07 recommending that they run the FA Inbound process is not valid.
FA	Pkg - Miscellaneous	1614971003	Unable to override SAP with Professional Judgment after Bundle 8 (Regs 2, 2007)	After applying CS Bundle 8, users are no longer able to override SAP using professional judgment. If the SAP value is 'Not Meet', the award fails validation regardless of whether the PJ override flag is on.
FA	Pkg - Miscellaneous	1623599001	Repackaging a student with Not Meet SAP and who has had loans disbursed is causing errors in Posting.	When the award is re-validated, the Offered and Accepted amounts are reduced to the Net Disbursement Amount for the Loan, but the Offered and Accepted amounts are not reduced on the Disbursement tables. This causes the Posting process to error with Error: DATA CORRUPTION: AWARD TOTAL <> SUM(DISBURSEMENTS)

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SR	Class Search	1608917003	Class Search SQL errors out if there one of the search fields contains an apostrophe.	Class Search SQL error when an apostrophe is used as part of the search criteria on search criteria fields instructor name, course number and course description.
SSF	Tax Reporting - 1098T	1470748001	SF: Inconsistent treatment in 1098-T process for students who get no credit.	<p>If a student withdraws from the term the student receives a grade of WF and no 1098-T is generated. If a student simply fails all his/her classes the EARNED_CREDIT may or may not be set to 'N' depending on the setup in student records/grading scheme and the student may or may not get a 1098-T.</p> <p>Per the IRS regulations: Exceptions. You do not have to file Form 1098-T or furnish a statement for: Courses for which no academic credit is offered, even if the student is otherwise enrolled in a degree program; Colleges argue that academic credit is "offered" to students who fail. Offered and Earned are two different issues.</p>
SSF	Tax Reporting - 1098T	1580833001	Charges that are reversed and reposted are not being reported on the 1098T.	If a spring 2006 1098T eligible charge is posted in Dec 2005 and subsequently reversed in January of 2006 prior to running the 1098-T process, the charge will not be reported on the 2005 1098T. If after running the 2005 1098-t the charge is reposted in 2006 both the charge and the reversal will be included in PS_SF_1098_ITEM for 2006 and the net (zero) will be reported on the 2006 1098-T.
SSF	Tax Reporting - 1098T	1597377002	SF: Modify SFP1098.cbl to select students who have no row in the citizenship table and no row in the visa table as eligible	<p>Modify SFP1098.cbl to select students who have no row in the citizenship table and no row in the visa table as eligible. Currently a student with no row in the citizenship table is considered as ineligible. Since it is not required that a school populate the citizenship table many US natives are not getting 1098t forms.</p>

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SSF	Tax Reporting - 1098T	1601020001	Payment received 1098T is picking up canceled refunds in Box 4.	<p>Using the payments received method for 1098T reporting a payment received against eligible charges will show up in box 1. If those charges are subsequently dropped and the amount is refunded in the next calendar year the amount of the refund should be reported in box 4 as a prior year adjustment.</p> <p>When a refund is posted and then reversed it is still being added to box 4. The refund amount in the Refund header table is not set to 0 but the refund status is set to R. The item number is set to 0 in item_sf.</p>
SSF	Tax Reporting - 1098T	1603800003	Allow flexibility in 1098-T setup for Universities to determine who is issued a tax form 1098-T	<p>Although not required by law to issue 1098-T forms to students who had current year charges AND were enrolled in the calendar year some institutions choose to issue forms. They do so for the following populations of students: 1) Students who enrolled and were charged in December for the following calendar year and had no enrollment in the current year. 2) Students who were enrolled in the current year, but who had no charges in the current year.</p>
SSF	Tax Reporting - 1098T	1612133001	1098-T Problems with box 1, 4, 5 and 6 when payment swapping present using payments received method	<p>When a financial amount posts and forces out a payment from a prior year the following errors were noted on the 1098t. Box 1 (payments received) did not include the amt from a prior year that was reapplied in the current year. Box 4 (adjustments made from prior year) did not included the amt of prior year payments that were unapplied. Box 5 (Scholarships or grants) contained the amt of financial aid and all other payments posted in the calendar year. Box 6 (adjustments to scholarships or grants for a prior period) contained the current calendar years charges. This was true when there were no prior period scholarships or grants.</p>

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SSF	Tax Reporting - 1098T	1617548003	When a student has no valid name type for 1098T the prior students name will be inserted on 1098-T	Students name is not set to null prior to processing the next student. The 1098-T process selects a student name for the 1098-T based on user selections in the SF TIN setup. If a student has no row in ps_names that matches the allowable name_types as defined in the name usage table, the name for the preceding student is written to sf_1098_dtl and displayed on the page SF_1098_DTL
SSF	Tax Reporting - Canadian	1592567001	Receiving a SQL Insert Error for Duplicate Record When Running SFGENT4	When inserting a CIT record with 0.00 amounts in the CAN_TAX_BALANCE table, no check is done to see if one exists before inserting it. This is done within the procedure Insert-Tax-Balance on line 830 of the SQR. This logic will only work if all student records from Student Financials that have T4A information do NOT EXIST as employees in Payroll. For our institution, we do have students that we do hire on a part time bases within payroll. Because of this, they already have a CIT record in the CAN_TAX_BALANCE table.

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SSF	Tax Reporting - Canadian	1592600001	Problems With SFCRETAX	<p>SFCRETAX used in the production of Canadian T4A tax forms appears to have four issues:</p> <ol style="list-style-type: none"> 1. Populates appropriate tables for ALL records in table PERSONAL_DATA which causes the process to run for a long time; 2. Populates appropriate tables for ALL records in table PERSONAL_DATA which causes BOTH employees and students to get a PS_JOB record. By doing this, the WRONG dept ID, location & business unit information of the employee gets selected during the CTX910LD process. Since the employee now has a new record in the JOB table with the DEPTID, LOCATION & BUSINESS UNIT that was defined in the SF Business Unit table, the CXT910LD process now picks up this record instead of the one before it which it should be picking up; 3. Updates all appropriate tax tables with an effective date of \$AsOfDate (the run date) as appose to the last day of the tax year that the process SFGENT4 determines. The effect of this is that you get an error in employee data when running the CXT910LD process.; 4. SFCRETAX fails to populate the tables CAN_TAX_DATA & EMPL_WAGELS_CAN. The CTX910LD process uses these
SSF	Tut Calc	1673951001	After Applying 656271 Tuition Calculation process received an error in SFCFATRM_I_FATERM.	<p>After applying SA 8SP1 Bundle 19 tuition calculation process fails inserting into STDNT_FA_TERM. Stored statement SFCFATRM_I_FATERM in dms script sfcfatrm.dms does not include the new fields added to STDNT_FA_TERM by this bundle. The missing fields are SFA_ASG_AC_LVL_BOT, SFA_ASG_AC_LVL_EOT , OVRD_ASG_BOT, OVRD_ASG_EOT , SFA_ASG_AC_LVL_BCL, SFA_ASG_AC_LVL_ECL.</p>

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XCC	Relationships	1616002001	Not able to enter Phone Number in a format other than North American	Using navigation of Campus Community - Personal Information - Biographical - Relationships or Contributor Relations > Manage People > Use > Relationships. On Relationship Detail Tab, we're not able to enter phone numbers from Spain or France. An error message tells us that it needs to be entered in North American Format. We tried also by changing the Residency Country or the Citizenship Country first but it didn't work.
XCC	Relationships	1649900001	Relationship component errors after SA 8SP1 Bundle #18	Errors occur at the save when inserting a row for the same emplid-emplid relationship.
XCC	Relationships	1656324003	Cannot add more than one of the same relationship with blank EMPLID_RELATED after CS 8.9 Bundle 9.	Since we installed Bundle #9, we are not able to add more than one of the same Relationship to a record if the EMPLID_RELATED is left blank. For example, if you add a daughter with no EMPLID_RELATED, you receive an error if you try to add a second daughter with no EMPLID_RELATED. I tested with a number of different Relationship values, and this problem is consistent.
XCC	SEVIS	1653851003	No error on the J Alerts page for missing gender	Gender is a required field for J Students and if it is not filled in then the batch will fail with S0013 error. The Alerts page needs to show an Error when processing the student to indicate that this field is required. This is also the case for J Visa Dependents - A gender must be indicated - Male or Female. Unknown is no longer accepted.

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XCC	SEVIS	1658444003	I-20 Template and SEVIS Setup Page	When using the lookup on the I-20 template on the Academic Program/Plan level only academic plans which are coded as majors are available for selection on the SEV_TEMPLT_PL_VW. When we reference Peoplebooks SEVIS setup documentation it appears that you can setup different fee codes for all types of plans. Furthermore, in the Peoplebooks section regarding the SEVIS setup page it states "For each academic career, select the academic plan types for the SEVIS alerts process and the I-20 logic to use to determine the primary and secondary majors." This suggests that each institution is able to select appropriate values associated with minor and major, based on institutional policy regarding the definition of those academic plan types. However, when setting up the I-20 template you are unable to choose academic plans that are coded as anything other than major, even if the SEVIS setup page contains the values of Major, specialization and emphasis in the Major section. Our institution considers "specialization" and "emphasis" as majors. The logic which populates major
XCC	SEVIS	1663995001	Impact of Interface with SEVIS 5.7. Federally legislated program being upgraded.	As part of Immigration and Customs, SEVIS is being upgraded by the federal government - release 5.7. June 29 is the expected release date by the Federal Government making this an urgent issue.
XCC	SEVIS	1673021002	Report 1640543000 does not hide values as it is supposed to on SEVIS Event Type Page	In testing incident# 1640543001 it states that the SEVIS Event Types page (SEV_EVENT_TYPE) has been modified for the SEVIS - Dependent - Reactivate event so the only Default SEVIS Status is Active and it is hidden on the page. However, when user goes to the page it still has the option of either Active or Initial and it is not hidden