

Suggested Addendum to ToBe: Managing External Organizations for Student

Author: Lloyd E. Hall, Undergraduate Admissions Liaison

Date: September 13, 2005

The following represents a clarification of how Cornell proposes to use some of the PS functionality within External Organizations by **Admissions**.

PS allows institutions to select an approach to how they will structure their use of External Organizations. Three parallel components, *Contacts – Departments – Locations*, can be used to facilitate identifying organizations and to identify individuals within organizations for communication purposes. These are two separate needs. Earlier recommendations for structure attempted to use all three, resulting in a confusing mix of attributes. After much conversation with end-users and other PS team members, it was determined that selecting a single component and then building the structure from that focus might be the best approach.

For quick identification of a group of organizations or contacts within organizations that have similar characteristics, *Contact Type* would be the core component. This PS field would be used as a relatively high level discriminating element, allowing users to determine generic offices and roles within external organizations. While several suggested values for *Contact Type* would be specific to use by SA, care will be taken to also include values that make sense for users in CR, SF, FA, HR, etc. (*Clearly there will be a need to add to the following proposed values as use of this component expands to other functional offices.*) Examples of current *Contact Types* would include: Director of Guidance, Guidance Counselor, Principal\Head of School, President\CEO, Dir Fin Aid, Director of Admissions, Registrar, HR Director, Bursar, Agency Director, Academic Advisor, Faculty, International Advisor, Matching Gifts Coordinator, Foundation Director, etc.

The field of *Job Title* would include the actual title for a known individual, or a more generic title (possibly the same as the *Contact Type*) if the real title is not known. This may not be necessary since *Job Title is not a required field*. The actual name of the contact would also be entered if known, tied to the *Contact Type*. Note that *Contact Name* is currently a required field in PS if contact information is to be entered. For communications purposes the *Contact Type* value could be copied into the name field if the actual name of a contact is not known. (The absence of an entry in the *Job Title* field would be an additional indicator that no specific individual has been identified for a particular organization.) In this way you can still have phone and location information tied to a *Contact Type* without having the actual name of a person.

Contact Type = Director of Guidance
Contact Name = Director of Guidance
Job Title = <blank>

Since 3C's functionality for External Organizations appears to have several important limitations, it is most likely that communications to groups of External Orgs will involve queries of the RDS. It is preferable to have the RDS structured in such a way that External Org

information would include *Contact Type*, *Title*, *Contact Name*, *Location* and *Department* all tied to the *Contact Type* can be easily accessed and used for communications purposes. (Indeed, it should be possible to also link *Affiliations* information to the *Contact* information through the RDS in a way not as easily done via transaction pages in PS.)

The designation “Primary Contact” would still be prescribed as “Director of Guidance” for secondary schools, and “Registrar” for post-secondary schools, but “Primary Contact” will not be used as a value in *Contact Type by Student*.

Outstanding Issues:

- Business practice for Org Type School would be that a *Contact Type* and the *Contact Name* would be entered for all organizations. These are required fields. *Contact Name* should remain a required field since there is extensive functionality in the rest of PS tied to this field. (Changing it to a non-required field represents a modest modification but the proposed work around is probably preferable to making the mod.)
- The fields of *Contact Type*, *Contact Name*, and *Contact Title* would all need to be available in the RDS.
- Affiliations values of *Group Type* and *Group Code* would need to be available in the RDS.
- *Contact Type* values need to be explored with CR, CE, Financial Aid, UAO and other PS offices within Cornell. The proposed revised values would be taken to the Student Setup Table Group for approval and then to the broader shared-tables group.