Creating an Org (Organization/Sponsor)

Navigation:
Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization Table

“Find an Existing Value” tab

Steps/Notes:
- The page will land on the “Find an Existing Value” tab. You can use this tab to locate an Org that already exists.
- Enter the relevant search value(s) and click “Search.”
- If you are searching for an SFS-specific Org, be sure to set the criteria in the Organization Type field to “SFTP.”
“Add a New Value” tab

Steps/Notes:
- If you need to add a new org, click on the tab titled “Add a New Value.”
- Allow the system to automatically assign the Org ID by accepting the default value of “New.”
- Click “Add.”
Entering new Org data

Organization Table tab

Steps/Notes:
- The effective date will default to the current business date.
- In the Description field enter the name of the organization. Once you tab out of this field, the Long Description and Short Description fields will auto-populate with the entered value.
- Set the Organization Type to “SFTP.”
- Accept the default of “Public” for the Proprietorship.
Adding an Address

“Organization Table” tab

Steps/Notes:
- To add an address, click on the “Locations” hyperlink.
“Location Summary” tab

Steps/Notes:
- Click on the “Location Details” hyperlink.
“Location Detail” tab

Steps/Notes:

- The effective date will default to the current business date.
- In the Description and Short Desc fields, enter in the name of the Org.
- Enter the relevant country. You can also use the spyglass to locate the country.
- Click on the “Edit Address” hyperlink.
“Edit Address” page

Steps/Notes:

- Enter in the full address. You can use lines 2 and 3 for additional address data such as suite and/or room number.
- The County field is optional.
- Click “OK.”
“Location Detail” tab

Steps/Notes:
- After clicking “OK” you will be brought back to the “Location Detail” tab.
- The entered address is now populated.
- Click “OK.”
“Organization Table” tab

Steps/Notes:
- After clicking “OK” you will be brought back to the “Organization Table” tab.
- The entered address is now populated in the Active Locations section.
- Set the address as the Primary Location by clicking on the spyglass and selecting the generated value.
Adding a contact

“Organization Table” tab

Steps/Notes:
- Click on the “Contacts” hyperlink.
“Contact Summary” tab

Steps/Notes:
- Click on the “Contact Details” hyperlink.
“Contact Detail” tab

Steps/Notes:

- The effective date will default to the current business date.
- If the contact exists in the Student Central system (if they have an emplid) you can bring in their emplid in the ID field.
- Enter the name (first, last) of the contact.
- Enter the contact’s job title.
- Set the Contact Type field to “TPC.”
- Set the Contact Address to “Location” and click on the spyglass to select the address.
- Enter in the contact’s email address.
- Enter in the web URL, if applicable.
- Enter in the contact’s phone number and check “Preferred.”
- Click “OK.”
“Organization Tale” tab

Steps/Notes:

- After clicking “OK” you will be brought back to the “Organization Table” tab.
- Set the contact as the Primary Contact by clicking on the spyglass and selecting the generated value.
- Be sure to click “Save.”