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Evaluation of Transfer Credit Reports: Orientation Office

OBJECTIVE: Outlines the Steps Taken to Process Student Groups and Generate Evaluation of Transfer Credit Reports.					
CONTEN	CONTENTS:				
LESSON 1	ADD STUDENTS TO STUDENT GROUP VETC				
LESSON 2	BATCH GENERATING DATA FOR ETC REPORTS				
LESSON 3	BATCH GENERATING REPORTS STEP 2				
LESSON 4	EVALUATION OF TC REPORTS IN BATCH				
LESSON 5	INACTIVATING STUDENTS IN A STUDENT GROUP				

NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at <u>http://www.sonoma.edu/it/cms/contact.html</u> to locate the **CAMPUS COMMUNITY FUNCTIONAL LEAD**.



Lesson 1: Add Students to Student Group VETC

Note: When inactivating a group of students, it should never be set for the same date as the activation row. For example, if you activate a group of students for the RATH student group on 5/21/2015 the earliest they should be inactivated is 5/22/2015. Never run an activation and inactivation on the same day.

Navigation: Main Menu > Records and Enrollment > Career and Program Information > Process Student Groups

Step	Action	Screenshot
1	IfThenA run control exists and you know the IDEnter it in the Run Control ID box and click Search.A new run control needs to be createdClick on Add a New Value, enter a name for the run control, and click Add.	Process Student Groups 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 Search Criteria Search by: Run Control ID begins with Case Sensitive Search Advanced Search Find an Existing Value Add a New Value
2	Select External File in the drop down menu under Selection Tool. Click the Upload File button.	Population Selection Selection Tool: External File Attached File: File Mapping: Create File Mapping
3	The external file should be in .csv format and should have only emplids (Student ID's) in the file. Before you save the file as a .csv make sure that the full emplid is listed including the zeros. Once the file is saved, the .csv format will drop the leading zeros.	File name: SSU_ORNT_ERD_NO_ORIEN_TRAN_4312.csv Save as type: CSV (Comma delimited) (*.csv)
		2



4	Once the file has been uploaded, the file name will appear next to Attached File.	Attached File: 90_sg_test.csv
5	Enter the File Mapping name: STUDENT GROUP LOAD	Population Selection Selection Tool: External File Attached File: Upload File File Mapping: STUDENT GROUP LOAD Create File Mapping
6	 Enter the following information: Academic Institution: SOCMP Student Group: VETC Effective Date: current date Effective Status: Active Comment: Assign a comment to students in this process. 	Student Group Data *Academic Institution SOCMPQ Sonoma State University Update Tuition Calc Required *Student Group VETCQ Evaluation of TC batch *Effective Date 01/06/2015 Image: Comment Spring 2015 Transfer Orientation Image: Comment Image: Comment
7	Click Save	Save Save
8	Click Run	Run
9	Select Server Name: PSUNX	Server Name: PSUNX
10	Click OK	ок
11	Select the Process Monitor link	Process Monitor
12	Refresh until Run Status is Successful and Distribution Status is Posted	Refresh Distribution Status Success Posted
13	Select the Details link	Details Details



14	Select the Message Log link	Me	ssage Log		
15	Check the Total Population row to see if the number inserted matches the number of rows in your query. If the numbers do not match, check the Message Log.	10	11:08:24AM	Total Population Selection Emplids Inserted: 85	Explain



Lesson 2: Batch Generating Data for the ETC Reports

Navigation: Academic Advisement>Advisement Processes>Generate Report Requests

Introduction: The Evaluation of Transfer Credit (ETC) is a report that retrieves data from the ARR. If the ARR is not run first, the ETC will not have any information. You can run the ARR in batches based on Student Groups, Majors, Advisors, or Academic Level.

Step	Action	Screenshot
1	1 Navigate to the Generate Report Requests screen and either search for previously used run control or Add a New Value (Step 2).	Generate Report Requests 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
		▼ Search Criteria Run Control ID: begins with ▼ Report Date: = ▼ ■ Report Identifier: begins with ▼ □ Case Sensitive
2	If this is your first time running this process, click Add a New Value and type the name: Generate_Reports Note: Your Run Control ID name cannot contain spaces. Click the Add button.	Generate Report Requests Eind an Existing Value Add a New Value Run Control ID: Generate _Reports



3	Enter data in the "Advisement Report Request Data" as pictured. Leave the "As of Date" defaulted to	Advisement Report Request Data *Report Date 03/21/2014 *Academic Institution Sonoma State University *Report Type CARR *Report Identifier BATCH *As of Date 01/01/3000
	01/01/3000	Freeze Record:
5	In the Population Selection area, change Selection Tool to PS Query.	Population Selection Population Selection Selection Tool: PS Query Query Name: Launch Query Manager Preview Selection Results
6	For Query Name use: SAA_RPT_STUDENT _GROUPS or use the magnifying glass to select this query from a list. Click Edit Prompts.	Population Selection Population Selection Selection Tool: PS Query Query Name: SAA_RPT_STUDENT_GROUPS Student Select List Use Student Select Clear List
7	Academic Institution and Report Type should populate. For Student Group enter VETC.	Edit Prompts Query Prompts Launch Quer Academic Institution: SOCMP Q Report Type: CARR Q Student Group: VETC Q OK Cancel
8	Click Save.	Save



9	Click Run.	Run
10	Select Server Name: PSUNX	Server Name: PSUNX
11	Click OK	ОК
12	Select the Process Monitor link	Process Monitor
13	Refresh until Run Status is Successful and Distribution Status is Posted.	Refresh Distribution Status Success Posted
	Note: This process may take minutes up to an hour, depending on query size. Do not continue to the next Lesson until this process is complete.	



Navigation:Academic Advisement>Advisement Processes>Generate Advisement Reports

Lesson 3: Batch Generating Reports Step 2

Step	Action	Screenshot
1	Under the Find an Existing Value tab enter the same Run Control ID we used previously: Generate_Reports	Generate Advisement Reports Enter any information you have and click Search. Leave fields blank for Find an Existing Value Add a New Value Search Criteria Search by: Run Control ID begins with Generate_reports
2	For Report Type, enter CARR	*Academic Institution SOCMP Q *Report Type CARR Q
3	In the FROM and the TO boxes, enter the date when Lesson 1 was run (probably todays date). Note: Enter the TO date first, then the FROM date to avoid date error.	Additional Run Control Parameters From To Report Identifier 1 03/21/2014 03/21/2014 BATCH Gene



4	Select Save	Save
5	Select Run	Run
6	On the Process Scheduler Request page, select PSUNX under Server Name.	Server Name: PSUNX V
7	Click OK	Process Scheduler Request User ID: BECKWITA Server Name: PSUNX Recurrence: Run Date: 03/21/20 Recurrence: Run Time: 2:38:488 Time Zone: Run Process Name Process List Select Description Process Name Fac Grad Req Audt2 CSUFGRA2 OK Cancel
8	Click on Process Monitor	It Reports enerate_Reports Report Manager Process Monitor Process Instance:1059 SOCMP Sonoma State University CARR Academic Requirements Report



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9 Refresh until Run Status is Successful	Save on Refresh			
and Distribution Status	Customize Find Vie	ew All	First 🔳 1-2 of	2 🕩 Last
is Posted.	Run Date/Time	Run Status	Distribution Status	<u>Details</u>
Note: This process can	03/13/2009 1:02:13PM PDT	Success	Posted	Details
take 30 minutes to several hours,	03/13/2009 12:55:08PM PDT	Success	Posted	<u>Details</u>
depending on how large the student population is that you selected.				

Lesson 4: Evaluation of TC Reports in Batch

Navigation: SON Customizations > SON Campus Solutions > Advising > Reports > Eval of Transfer Credit Rpt

Step	Action	Screenshot		
1	Search for a Run Control ID to use.	Eval of Transfer Credit Rpt Enter any information you have and click Search. Leave fields blank for a	list of all values.	
	Use the same Run Control ID used previously:	Find an Existing Value Add a New Value Search Criteria Search by: Run Control ID begins with Generate_Reports		
	Generate_Reports	Case Sensitive Search Advanced Search		
2	Enter the following Information: Academic Institution:			
	SOCMP	*Academic Institution As of Date	Report Request Criteria	
	As of Date: Put today's date or you will get old reports that may not be current data.	SOCMP ▼ 01/06/2015	: Group 🔻	



	Report Request Criteria: Student Group.	
3	Use the current admit	
	term:	Admit Term Student Group
	Enter the Student Group: VETC You can use the magnifying glass to search for this student group if needed.	2153 Q VETC Q
4	Click Save	
		Save
	Click Run	Run
5	On the Process	
	Scheduler Request page, select PSUNX under Server Name	Server Name: PSUNX Y
6	Click OK	ОК
7	Click on the Process Monitor to view the status of your process. Again, this process can take some time to complete depending on the size of your student group.	Process Monitor
8	Refresh until your report Run Status is listed as Success and Run Status is Posted. Select the Details link.	W All First 1-12 of 12 Last Run Status Distribution Status Details T Success Posted Details



9 Select the View Log/Trace button.	Actions Parameters Transfer Message Log Batch Timings View Log/Trace View Log/Trace		
10 Click SONAV140.pdf to retrieve your report(s). The reports will open in a new window. Note: Most reports will be more than one page per student.	File List Name SONAV140 .pdf SONAV140 .txt Message Log Trace File	File Size (bytes) 5,555,062 0 1,620 310,825	

Lesson 5: Inactivating Students in Your Student Group

Note: When inactivating a group of students, it should never be set for the same date as the activation row. For example, if you activate a group of students for the RATH student group on 5/21/2015 the earliest they should be inactivated is 5/22/2015. Never run an activation and inactivation on the same day.

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Step

Action

Screenshot



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2	Select External File in the drop down menu under Selection Tool. Click the Upload File button.	Population Selection Population Selection Selection Tool: External File Attached File: File Mapping: Q Create File Mapping
3	Once the file has been uploaded, the file name will appear next to Attached File.	Attached File: 90_sg_test.csv
4	Enter the File Mapping name: STUDENT GROUP LOAD	Population Selection Population Selection Selection Tool: External File Attached File: Upload File Delete File File Mapping: STUDENT GROUP LOAD Create File Mapping
5	 Enter the following information: Academic Institution: SOCMP Student Group: VETC Effective Date: current date Effective Status: INACTIVE Comment: Assign a comment to students in this process. 	Student Group Data *Academic Institution SOCMPQ Sonoma State University Update Tuition Calc Required *Student Group VETCQ Evaluation of TC batch *Effective Date D1/06/2015 Inactive *Effective Status Inactive Comment Spring 2015 Transfer Orientation Vertice



6	Click Save	Save Save
7	Click Run	Run
8	Select Server Name: PSUNX	Server Name: PSUNX
9	Click OK	ок
10	Select the Process Monitor link	Process Monitor
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