

Evaluation of Transfer Credit Reports: Orientation Office

OBJECTIVE: Outlines the Steps Taken to Process Student Groups and Generate Evaluation of Transfer Credit Reports.

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

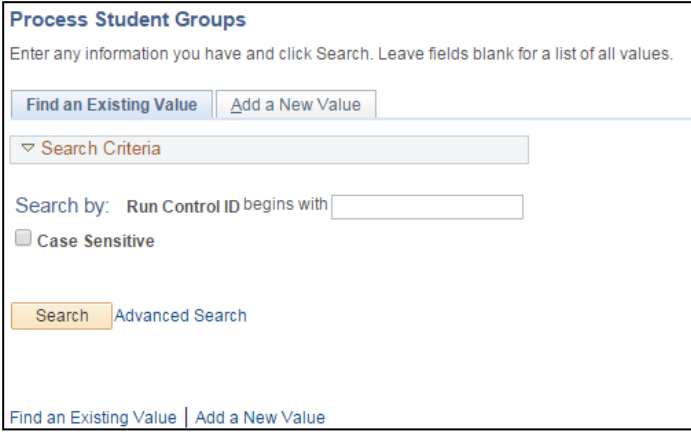
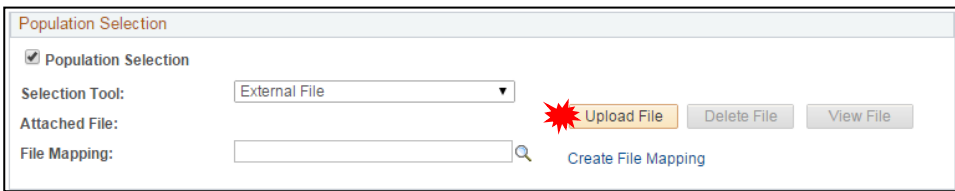
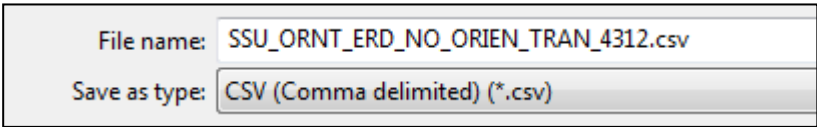
NEED ADDITIONAL INFORMATION?


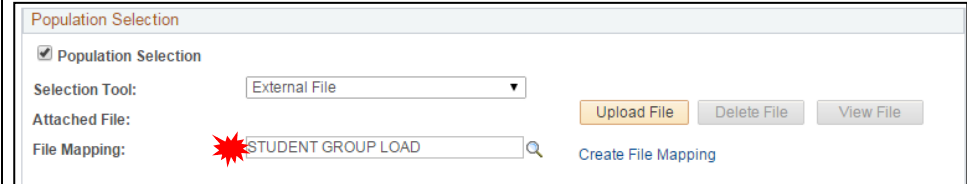
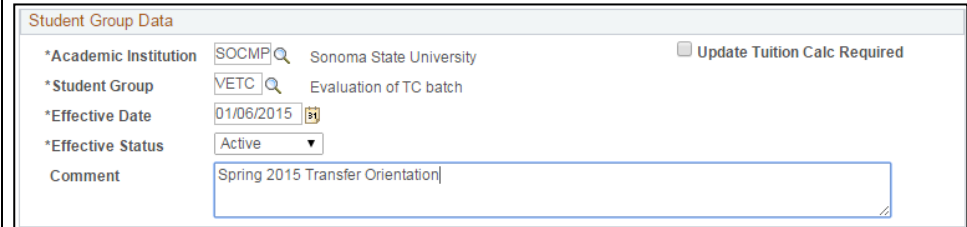

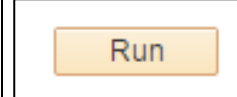
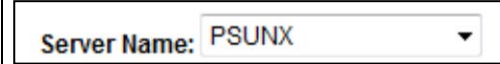
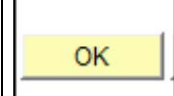
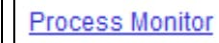


For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/it/cms/contact.html> to locate the **CAMPUS COMMUNITY FUNCTIONAL LEAD.**



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	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">If</th> <th style="width: 50%;">Then</th> </tr> </thead> <tbody> <tr> <td>A run control exists and you know the ID...</td> <td>Enter it in the Run Control ID box and click Search.</td> </tr> <tr> <td>A new run control needs to be created...</td> <td>Click on Add a New Value, enter a name for the run control, and click Add.</td> </tr> </tbody> </table>	If	Then	A run control exists and you know the ID...	Enter it in the Run Control ID box and click Search .	A new run control needs to be created...	Click on Add a New Value , enter a name for the run control, and click Add .	
If	Then							
A run control exists and you know the ID...	Enter it in the Run Control ID box and click Search .							
A new run control needs to be created...	Click on Add a New Value , enter a name for the run control, and click Add .							
2	<p>Select External File in the drop down menu under Selection Tool.</p> <p>Click the Upload File button.</p>							
3	<p>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.</p>							

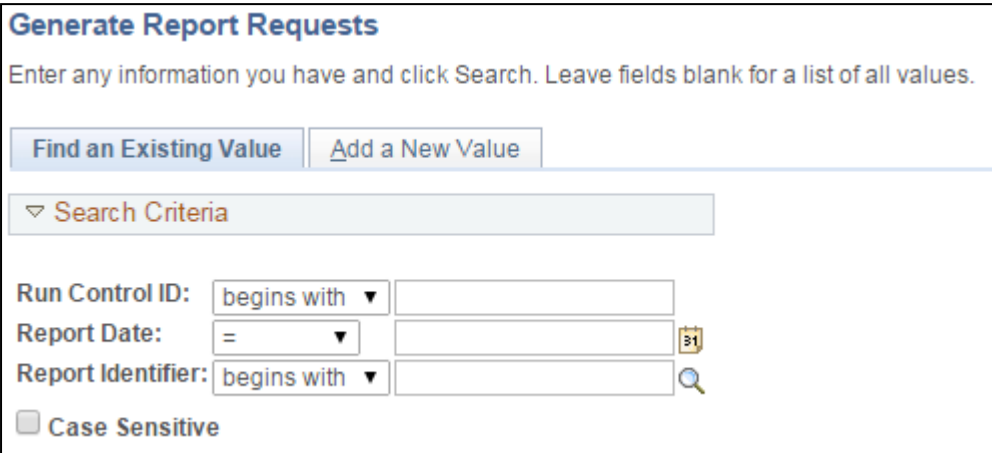

4	Once the file has been uploaded, the file name will appear next to Attached File.	
5	Enter the File Mapping name: STUDENT GROUP LOAD	
6	Enter the following information: <ul style="list-style-type: none"> Academic Institution: SOCMP Student Group: VETC Effective Date: current date Effective Status: Active Comment: Assign a comment to students in this process. 	
7	Click Save	
8	Click Run	
9	Select Server Name: PSUNX	
10	Click OK	
11	Select the Process Monitor link	
12	Refresh until Run Status is Successful and Distribution Status is Posted	
13	Select the Details link	

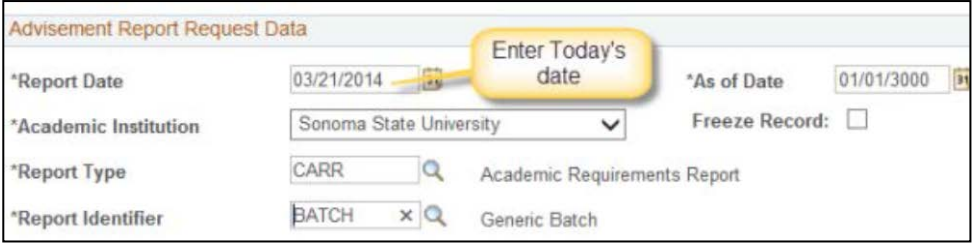
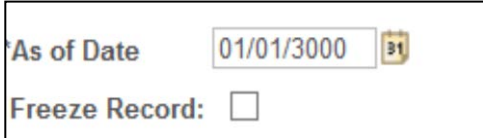
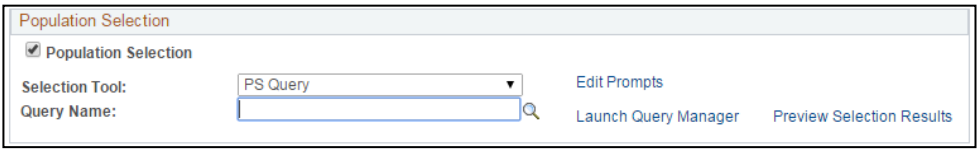
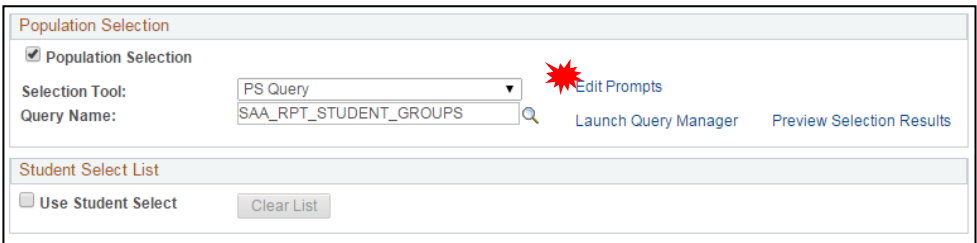
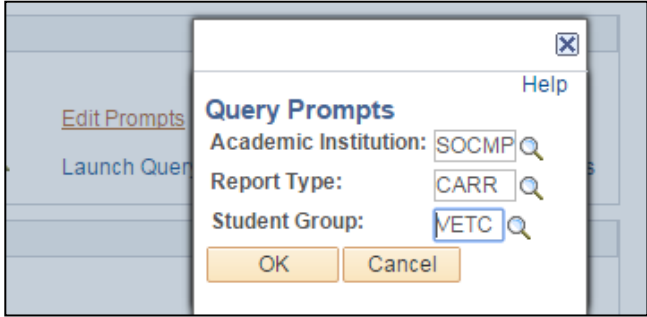
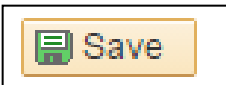
14	Select the Message Log link	
15	<p>Check the Total Population row to see if the number inserted matches the number of rows in your query. If the numbers do not match, check the Message Log.</p>	

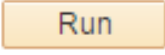
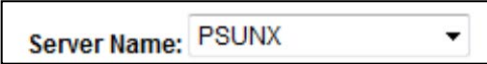
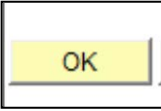

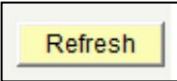
Lesson 2: Batch Generating Data for the ETC Reports

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.

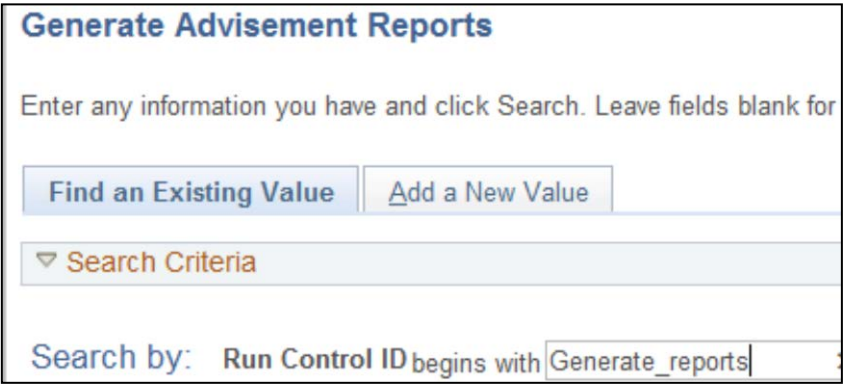


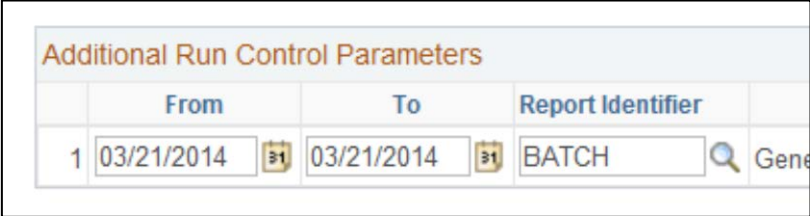
Step	Action	Screenshot
1	<p>Navigate to the Generate Report Requests screen and either search for previously used run control or Add a New Value (Step 2).</p>	
2	<p>If this is your first time running this process, click Add a New Value and type the name: Generate_Reports Note: Your Run Control ID name cannot contain spaces. Click the Add button.</p>	



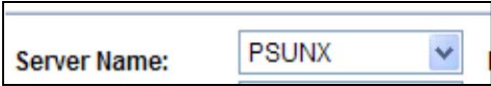
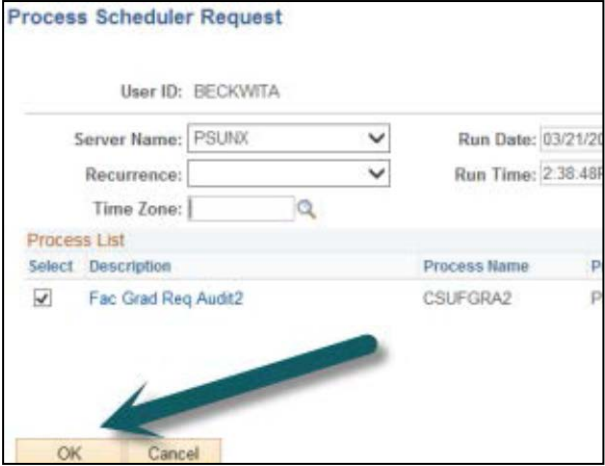

3	Enter data in the “Advisement Report Request Data” as pictured.	
4	Leave the “As of Date” defaulted to 01/01/3000	
5	In the Population Selection area, change Selection Tool to PS Query.	
6	For Query Name use: SAA_RPT_STUDENT_GROUPS or use the magnifying glass to select this query from a list. Click Edit Prompts.	
7	Academic Institution and Report Type should populate. For Student Group enter VETC.	
8	Click Save.	

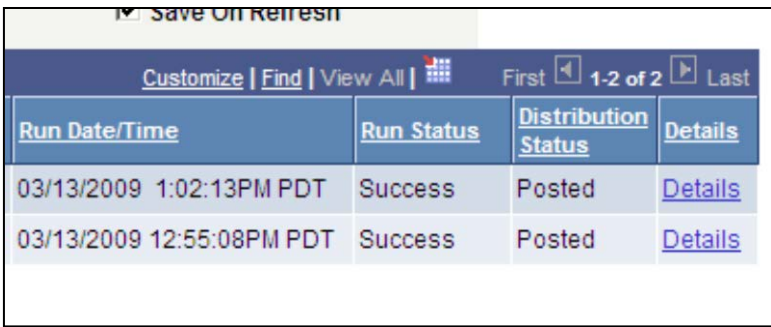
9	Click Run.					
10	Select Server Name: PSUNX					
11	Click OK					
12	Select the Process Monitor link					
13	Refresh until Run Status is Successful and Distribution Status is Posted. Note: This process may take minutes up to an hour, depending on query size. Do not continue to the next Lesson until this process is complete.	 <table border="1" data-bbox="862 758 1187 873"> <thead> <tr> <th>Run Status</th> <th>Distribution Status</th> </tr> </thead> <tbody> <tr> <td>Success</td> <td>Posted</td> </tr> </tbody> </table>	Run Status	Distribution Status	Success	Posted
Run Status	Distribution Status					
Success	Posted					

Navigation:Academic Advisement>Advisement Processes>Generate Advisement Reports

Lesson 3: Batch Generating Reports Step 2

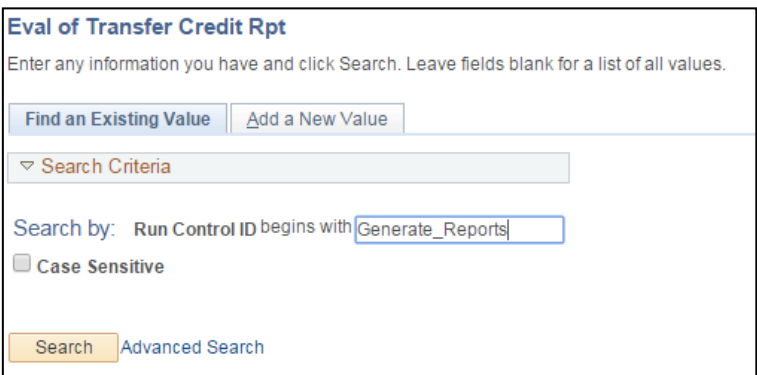

Step	Action	Screenshot								
1	Under the Find an Existing Value tab enter the same Run Control ID we used previously: Generate_Reports	 <p>Generate Advisement Reports</p> <p>Enter any information you have and click Search. Leave fields blank for</p> <p>Find an Existing Value Add a New Value</p> <p>▼ Search Criteria</p> <p>Search by: Run Control ID begins with <input type="text" value="Generate_reports"/></p>								
2	For Report Type, enter CARR	 <p>*Academic Institution <input type="text" value="SOCMP"/> 🔍</p> <p>*Report Type  <input type="text" value="CARR"/> 🔍</p>								
3	In the FROM and the TO boxes, enter the date when Lesson 1 was run (probably today's date). Note: Enter the TO date first, then the FROM date to avoid date error.	 <p>Additional Run Control Parameters</p> <table border="1"> <thead> <tr> <th></th> <th>From</th> <th>To</th> <th>Report Identifier</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text" value="03/21/2014"/> 📅</td> <td><input type="text" value="03/21/2014"/> 📅</td> <td><input type="text" value="BATCH"/> 🔍</td> </tr> </tbody> </table>		From	To	Report Identifier	1	<input type="text" value="03/21/2014"/> 📅	<input type="text" value="03/21/2014"/> 📅	<input type="text" value="BATCH"/> 🔍
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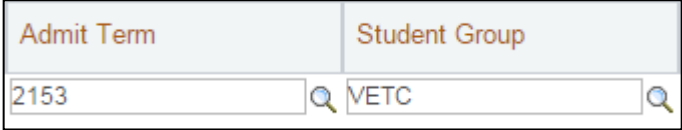
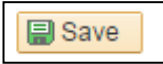
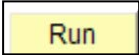
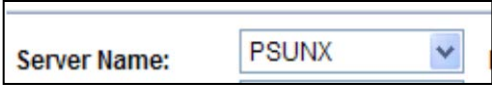
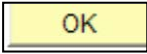

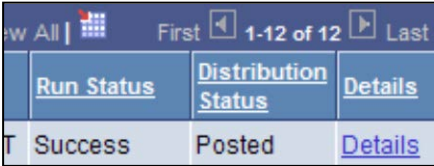
4	Select Save	
5	Select Run	
6	On the Process Scheduler Request page, select PSUNX under Server Name.	
7	Click OK	
8	Click on Process Monitor	

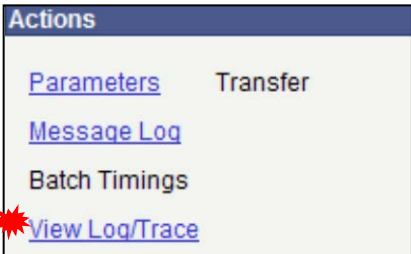
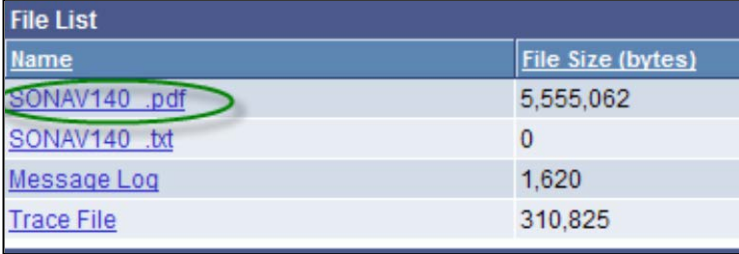
<p>9</p> <p>Refresh until Run Status is Successful and Distribution Status is Posted.</p> <p>Note: This process can take 30 minutes to several hours, depending on how large the student population is that you selected.</p>	
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Lesson 4: Evaluation of TC Reports in Batch

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

Step	Action	Screenshot
1	<p>Search for a Run Control ID to use.</p> <p>Use the same Run Control ID used previously:</p> <p>Generate_Reports</p>	
2	<p>Enter the following Information:</p> <p>Academic Institution: SOCMP</p> <p>As of Date: Put today's date or you will get old reports that may not be current data.</p>	

	Report Request Criteria: Student Group.	
3	Use the current admit term: Enter the Student Group: VETC You can use the magnifying glass to search for this student group if needed.	
4	Click Save	
	Click Run	
5	On the Process Scheduler Request page, select PSUNX under Server Name	
6	Click OK	
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.	
8	Refresh until your report Run Status is listed as Success and Run Status is Posted. Select the Details link.	

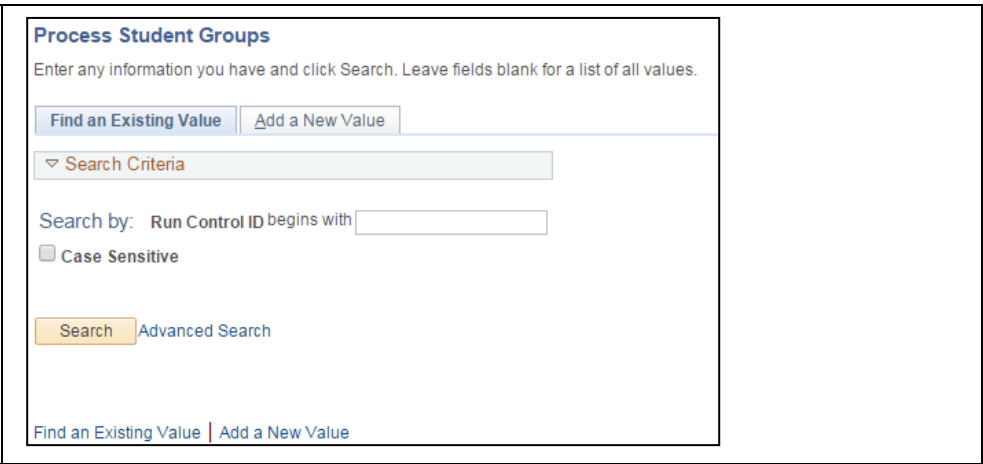
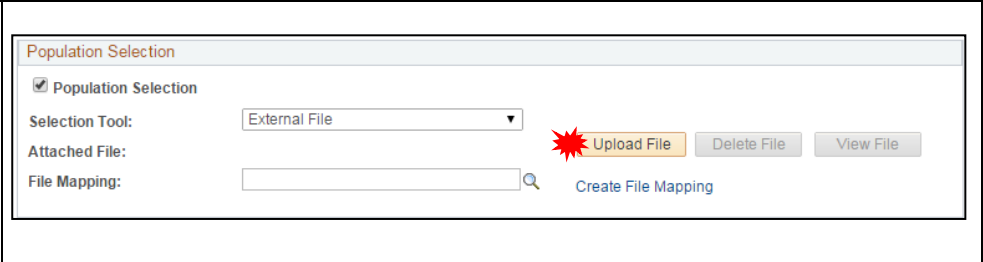
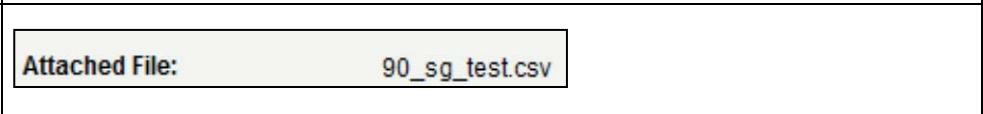
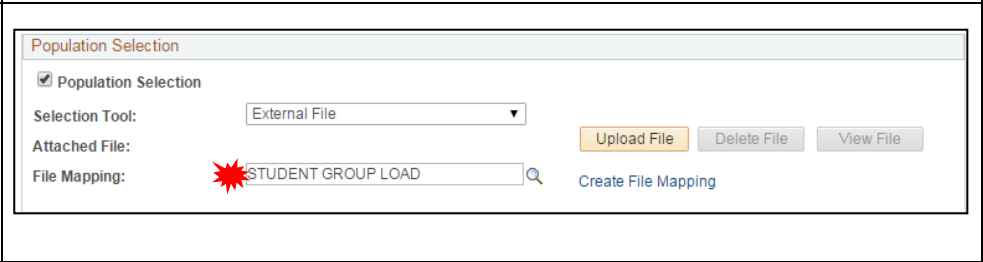
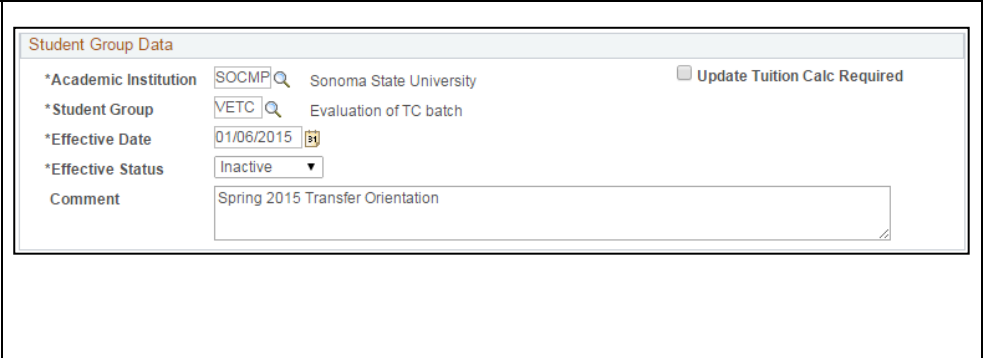
9	Select the View Log/Trace button.													
10	Click SONAV140.pdf to retrieve your report(s). The reports will open in a new window. Note: Most reports will be more than one page per student.	 <table border="1" data-bbox="558 569 1292 821"> <thead> <tr> <th colspan="2">File List</th> </tr> <tr> <th>Name</th> <th>File Size (bytes)</th> </tr> </thead> <tbody> <tr> <td>SONAV140 .pdf</td> <td>5,555,062</td> </tr> <tr> <td>SONAV140 .txt</td> <td>0</td> </tr> <tr> <td>Message Log</td> <td>1,620</td> </tr> <tr> <td>Trace File</td> <td>310,825</td> </tr> </tbody> </table>	File List		Name	File Size (bytes)	SONAV140 .pdf	5,555,062	SONAV140 .txt	0	Message Log	1,620	Trace File	310,825
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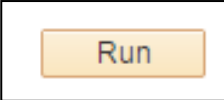
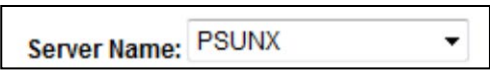
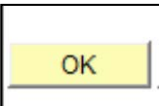
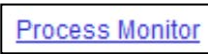
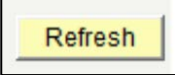
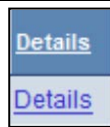

Lesson 5: Inactivating Students in Your Student Group

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.**

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

Step	Action	Screenshot
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<p>1</p>	<table border="1"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>A run control exists and you know the ID...</td> <td>Enter it in the Run Control ID box and click Search.</td> </tr> <tr> <td>A new run control needs to be created...</td> <td>Click on Add a New Value, enter a name for the run control, and click Add.</td> </tr> </tbody> </table>	If	Then	A run control exists and you know the ID...	Enter it in the Run Control ID box and click Search .	A new run control needs to be created...	Click on Add a New Value , enter a name for the run control, and click Add .	 <p>Process Student Groups Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>Search Criteria</p> <p>Search by: Run Control ID begins with []</p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Advanced Search</p> <p>Find an Existing Value Add a New Value</p>
If	Then							
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A new run control needs to be created...	Click on Add a New Value , enter a name for the run control, and click Add .							
<p>2</p>	<p>Select External File in the drop down menu under Selection Tool.</p> <p>Click the Upload File button.</p>	 <p>Population Selection</p> <p><input checked="" type="checkbox"/> Population Selection</p> <p>Selection Tool: External File</p> <p>Attached File: []</p> <p>File Mapping: []</p> <p>Upload File Delete File View File</p> <p>Create File Mapping</p>						
<p>3</p>	<p>Once the file has been uploaded, the file name will appear next to Attached File.</p>	 <p>Attached File: 90_sg_test.csv</p>						
<p>4</p>	<p>Enter the File Mapping name: STUDENT GROUP LOAD</p>	 <p>Population Selection</p> <p><input checked="" type="checkbox"/> Population Selection</p> <p>Selection Tool: External File</p> <p>Attached File: []</p> <p>File Mapping: STUDENT GROUP LOAD</p> <p>Upload File Delete File View File</p> <p>Create File Mapping</p>						
<p>5</p>	<p>Enter the following information:</p> <ul style="list-style-type: none"> Academic Institution: SOCMP Student Group: VETC Effective Date: current date Effective Status: INACTIVE Comment: Assign a comment to students in this process. 	 <p>Student Group Data</p> <p>*Academic Institution: SOCMP Sonoma State University</p> <p>*Student Group: VETC Evaluation of TC batch</p> <p>*Effective Date: 01/06/2015</p> <p>*Effective Status: Inactive</p> <p>Comment: Spring 2015 Transfer Orientation</p> <p><input type="checkbox"/> Update Tuition Calc Required</p>						

6	Click Save					
7	Click Run					
8	Select Server Name: PSUNX					
9	Click OK					
10	Select the Process Monitor link					
11	Refresh until Run Status is Successful and Distribution Status is Posted	 <table border="1" data-bbox="941 829 1274 940"> <thead> <tr> <th>Run Status</th> <th>Distribution Status</th> </tr> </thead> <tbody> <tr> <td>Success</td> <td>Posted</td> </tr> </tbody> </table>	Run Status	Distribution Status	Success	Posted
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