Evaluation of Transfer Credit

OBJECTIVE: Generating the Evaluation of Transfer Credit for specific populations or one student

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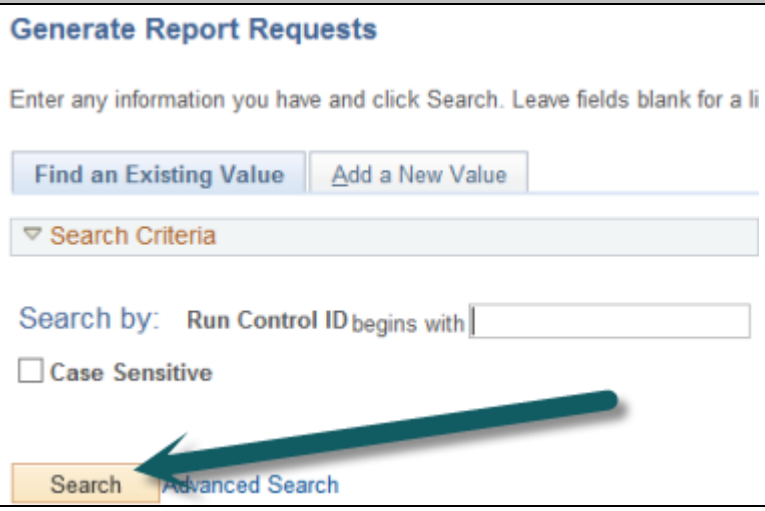
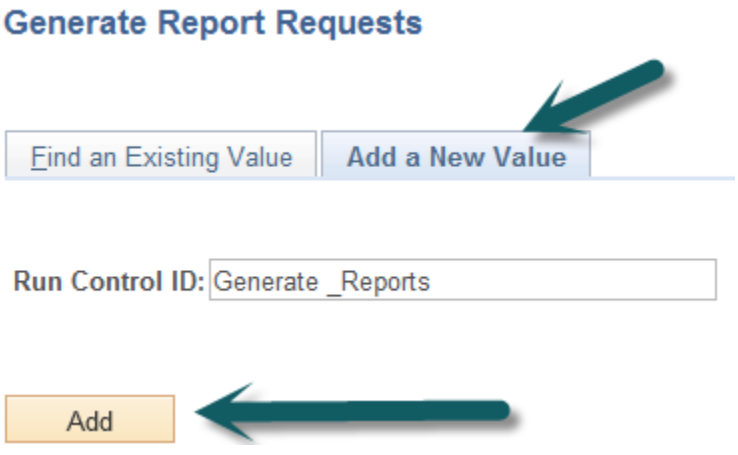
NEED ADDITIONAL INFORMATION?

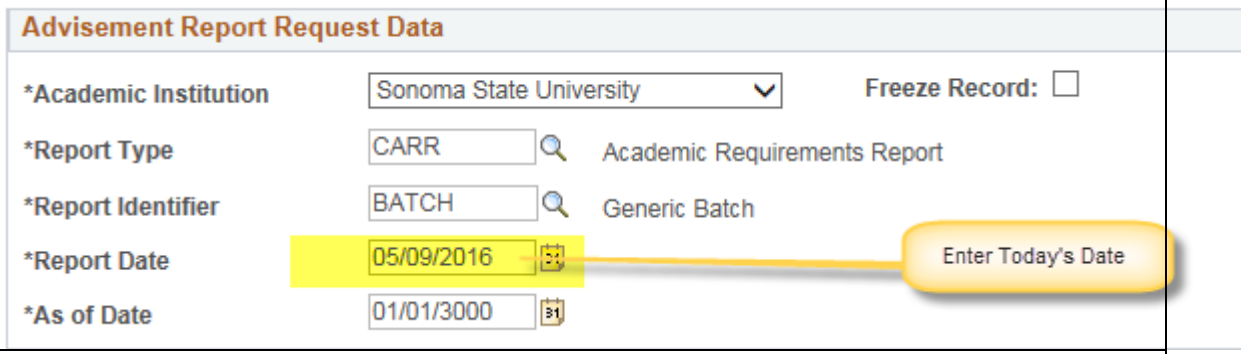
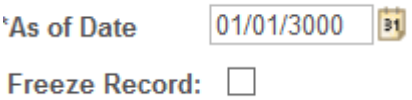
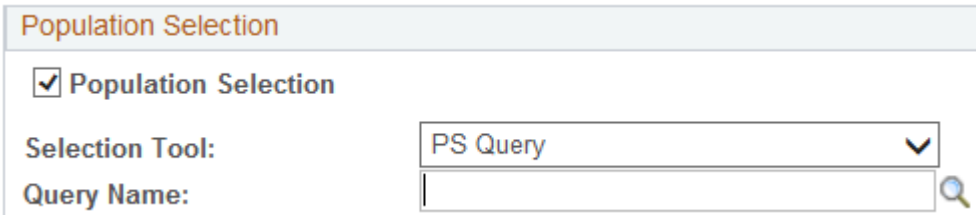
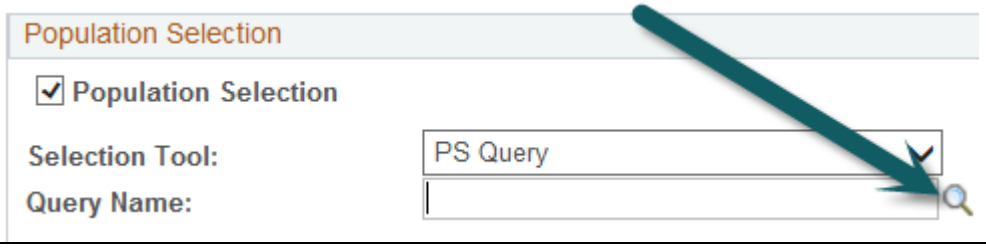
For further questions on this process please go to the CMS webpage at *http://www.sonoma.edu/it/cms/contact.html* to locate the **TRANSFER CREDIT FUNCTIONAL LEAD**.

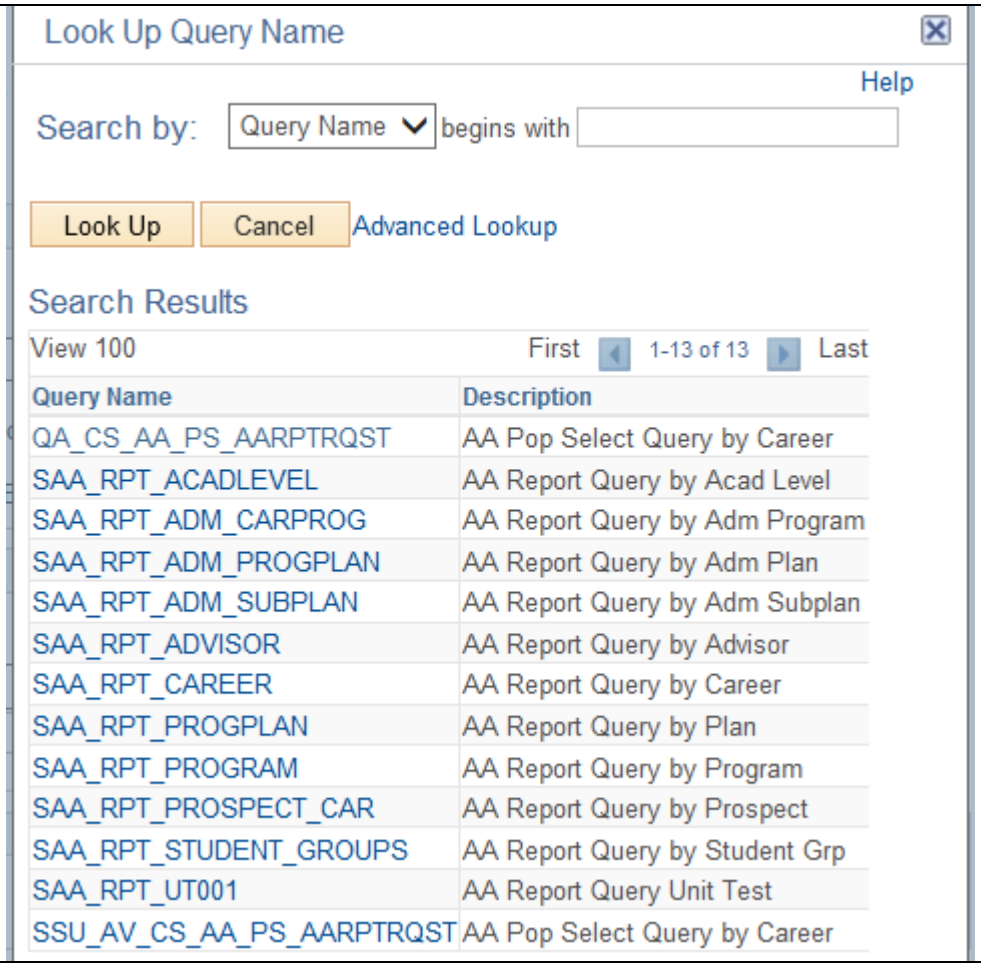
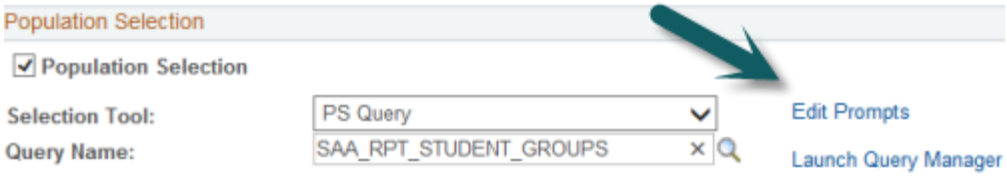
Lesson 1: Batch Generating data for the ETC reports

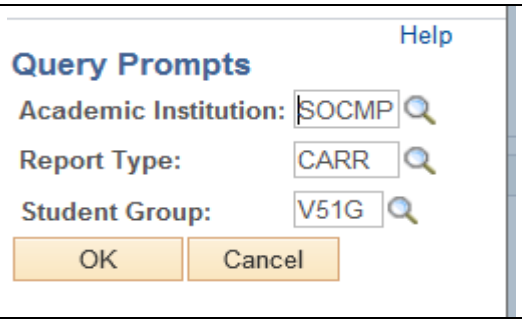
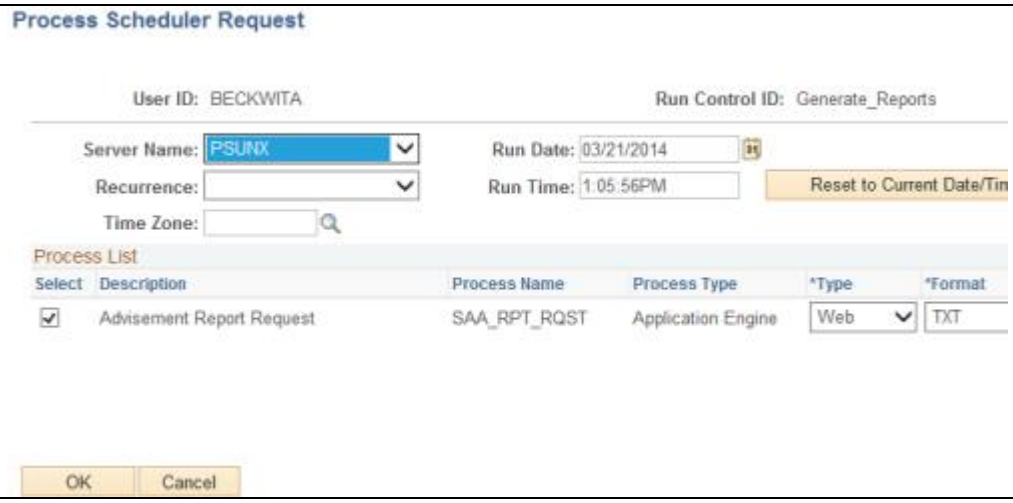
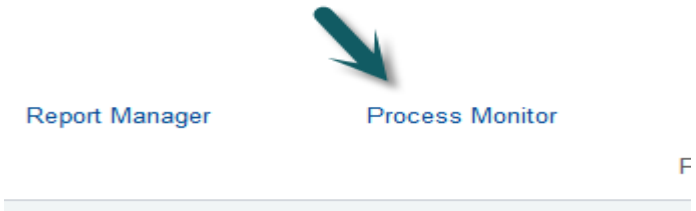
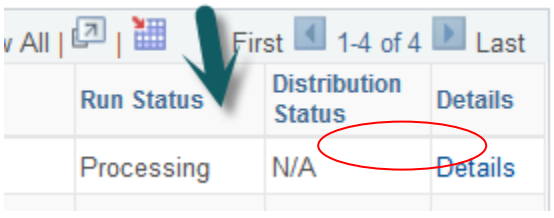
Navigation: Academic Advisement > Advisement Processes > Generate Report Requests

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	Navigate to Academic Advisement > Advisement Processes > Generate Report Requests and either search for your previously used run control, or go to step 2 to set up a new run control.	
2	If this is your first time running this process, you may need to 'Add a New Value' to have a Run Control ID. Click the Add a new Value tab and type in the name: Generate_Reports (Note: Your Run Control ID name cannot contain spaces) Click ADD	

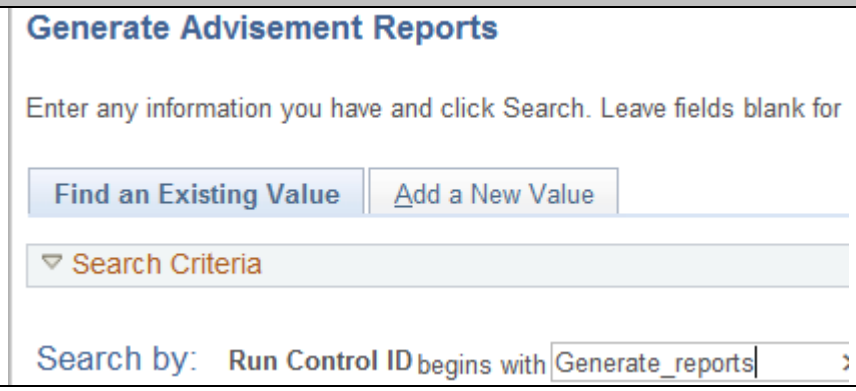
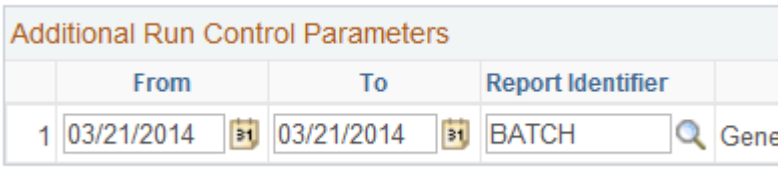
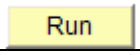
3	Enter data in the "Advisement Report Request Data" as pictured	
4	Leave the As of Date defaulted to 01/01/3000	
5	In the Population Selection, Change the Selection Tool to PS Query	
6	Click on the magnifying glass next to Query Name	

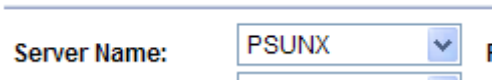
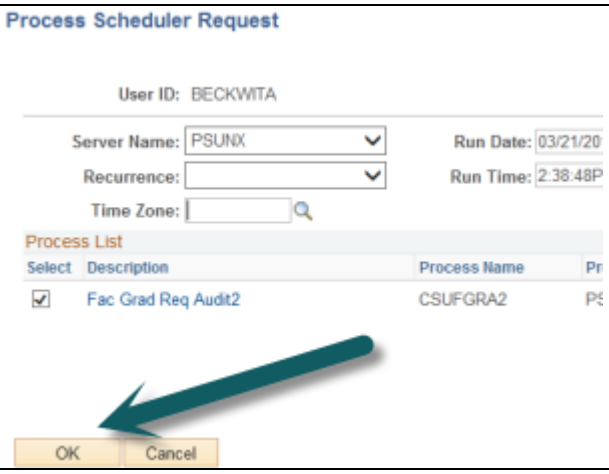
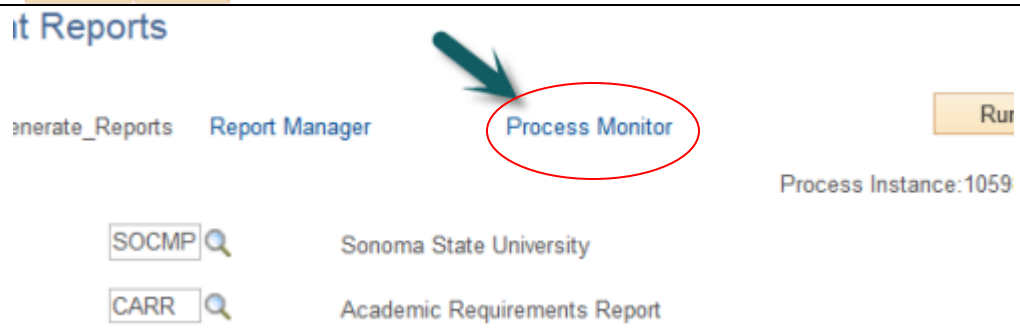
7	What students are you wanting to generate ETC's for? You can select any Query listed, based on what data you are using.	
	Examples:	SSU_AV_PROG_PLAN – use this one to run the reports for all students in a Major SAA_RPT_STUDENT_GROUPS – use this one to run all reports for all students in a specific Student Group
9	Click on the Query Name that is best for your needs Now click on Edit Prompts	

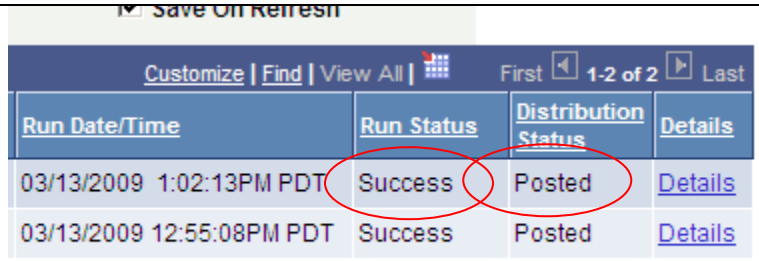
10	In this example, enter in the Student Group and click OK	
11	Click Save	
12	Click Run	
13	Server Name should be PSUNX Click OK	
14	Click on Process Monitor	
13	You can view the progress of the processing of these Reports	 Note: You cannot move on to Lesson 2 until the **Run Status** reads "Success" and the Distribution Status read "Posted" This process may take several minutes, up to an hour, depending on how many students are being captured in your query.

Lesson 2: Batch generating reports step 2

Navigation: Academic Advisement > Advisement Processes > Generate Advisement Reports

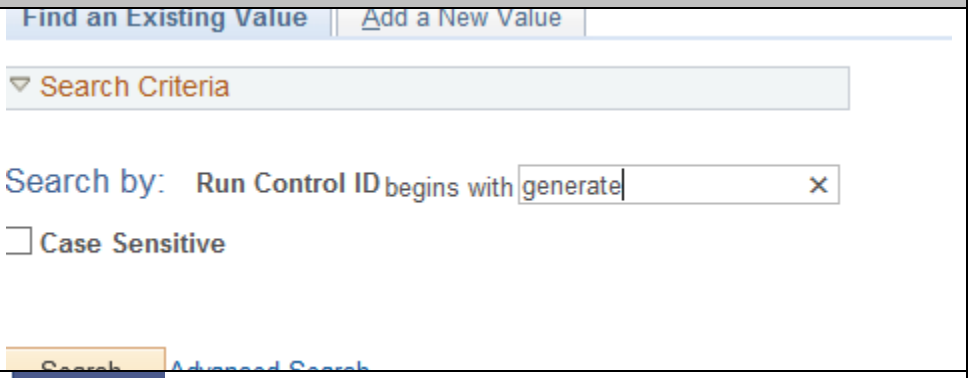
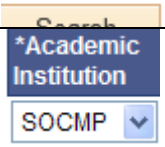
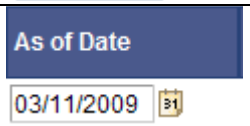
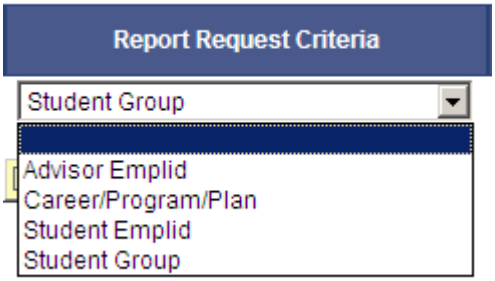
Step	Action	Screenshot
1	Search for a Run Control ID to use. You can use the same run control ID we used in Lesson 1. Generate_Reports	
2	In Report Type, enter CARR	
3	In the FROM box, enter today's date and the TO box, enter today's date (unless you ran Lesson 1 on a different date) Report Identifier = BATCH	
4	Click SAVE	
5	Click Run	

6	On the Process Scheduler Request page, select PSUNX under Server Name	
7	Click OK	
7	Click on the Process Monitor	

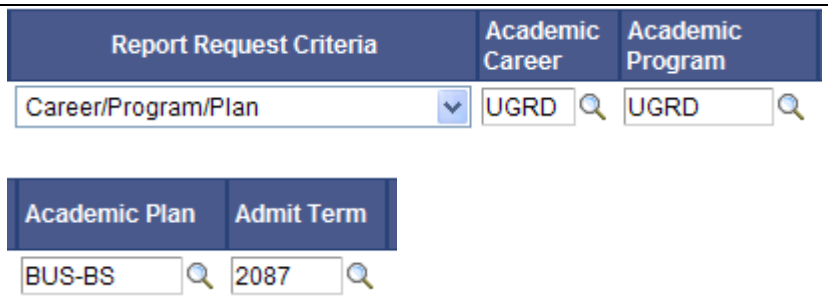
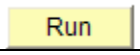
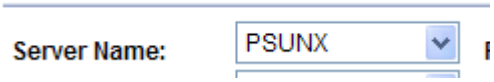
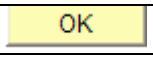
8	You can check the Process Monitor at any time to see if your process has completed	 Note: You cannot move on to Lesson 3 until the run Status read "Success" and the Distribution Status read "Posted"
9	Note →	**This process can take 30 minutes to several hours, depending on how large the student population is that you selected in Lesson 1.**

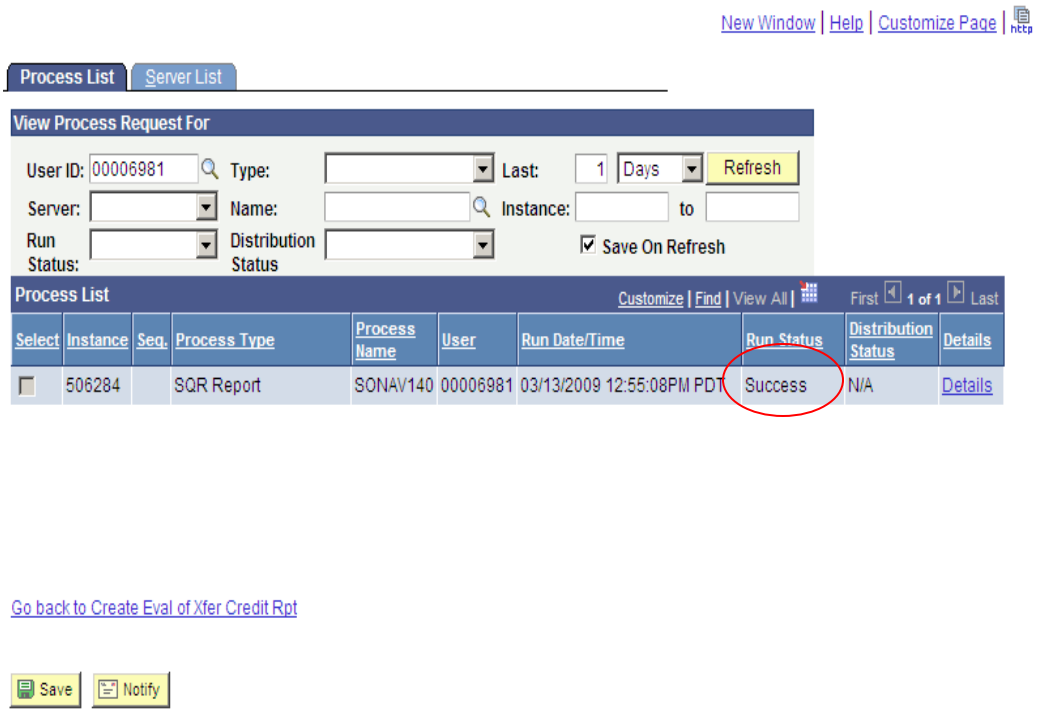
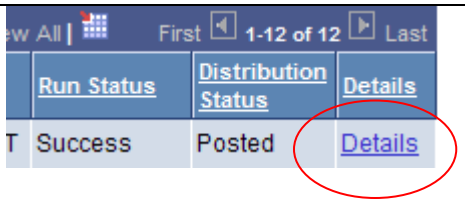
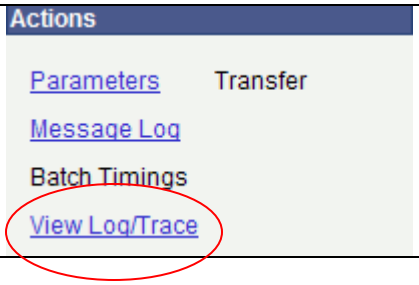
Lesson 3: Eval of TC Reports in batch

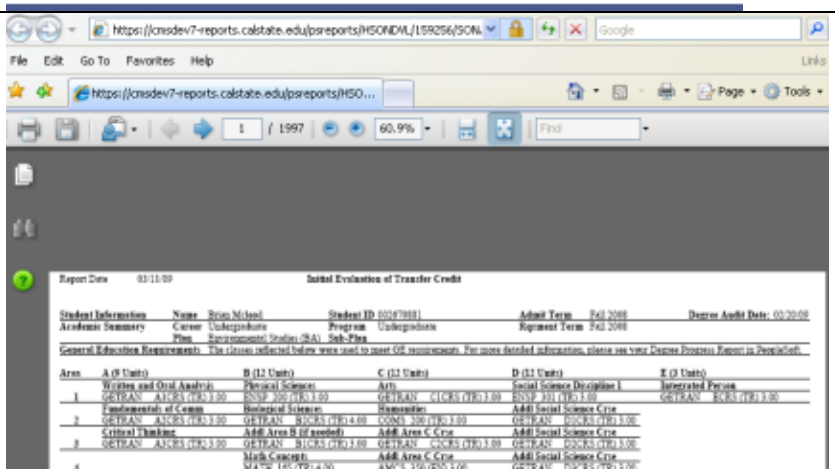
Navigation: SON Customizations > SON Campus Solutions > Advising > Reports > Eval of Transfer Credit Rpt

Step	Action	Screenshot
1	Search for a Run Control ID to use. You can use the same run control ID we used in Lesson 1. Generate_Reports	
2	Academic Institution: SOCMP	
3	As of Date: Always put in today's date, or you will get old reports that may not be have current GE course data	
4	At this time, only Career/Program/Plan and Student Groups are available to run this report.	

If	Then
Career/Program/ Plan	Go to Step 5
Student Group	Go to Step 6

5	Build your reports using the same criteria used in Lesson 1. For the **Career/Program/ Plan** option please select a Career option, an Academic Program option, an Academic Plan, and Admit Term	
6	To build your reports using Student Groups, select Student Group from the Report Request Criteria, enter the Admit Term, and enter the Student Group name	 Note: You will need security access to the Student Group to run this report. If you click on the magnifying glass, and the Student Group name is not a choice, you do not have security access. Contact the CMS Functional Lead you are working with.
7	Click Run	
8	On the Process Scheduler Request page, select PSUNX under Server Name	
9	Click OK	
10	Click on the Process Monitor to view the status of your process	

11	Your reports will be ready once the Run Status says "Success" Again, depending on the size of your student group or major, this process can take some time to complete.	
12	Once the Run Status is Success and the Distribution Status is Posted, click on the blue Details link	
13	Click on View Log/Trace	

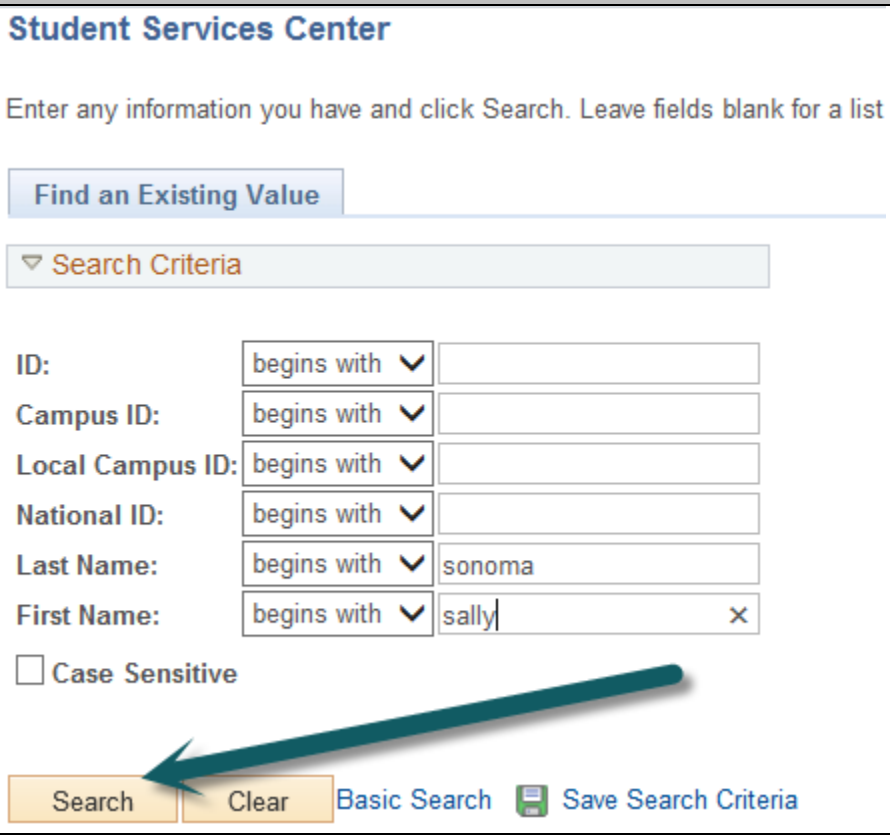
14	Click on SONAV140.pdf to retrieve your report(s)	
15	The PDF files will pop out into a different window,(will be one file containing all reports) and are ready to be printed. Note: Most reports will be more than one page per student.	

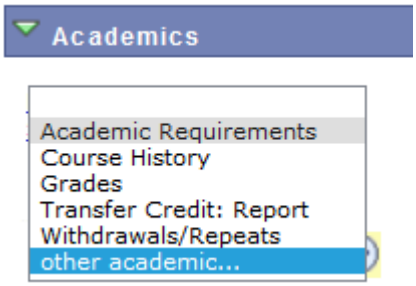
Lesson 4: Eval of TC report for one student

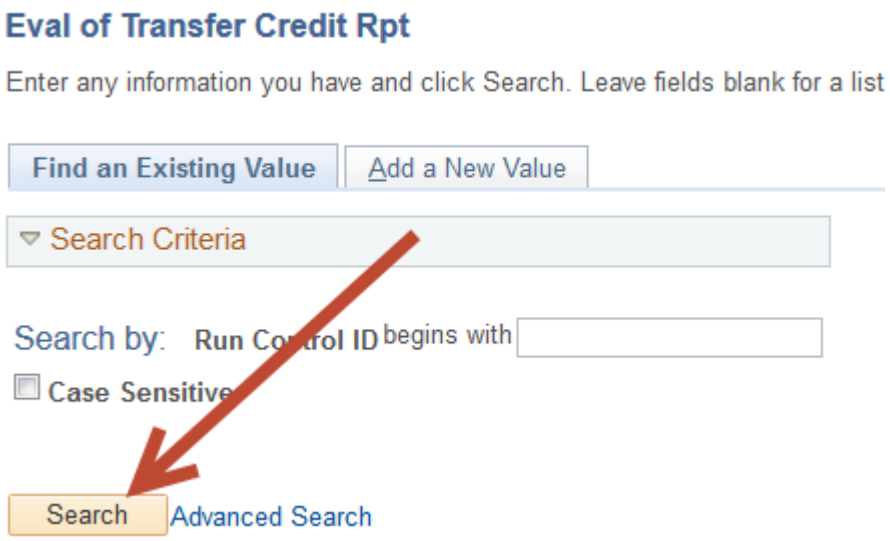
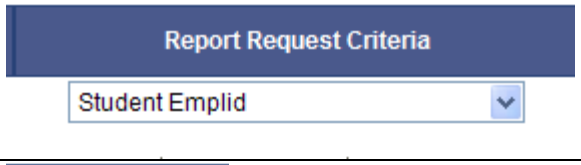
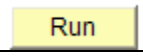
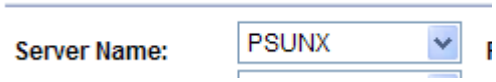
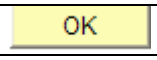
Navigation: Campus Community > Student Services Ctr (Student)

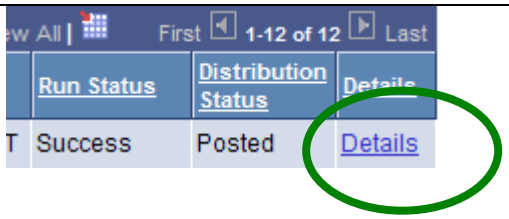
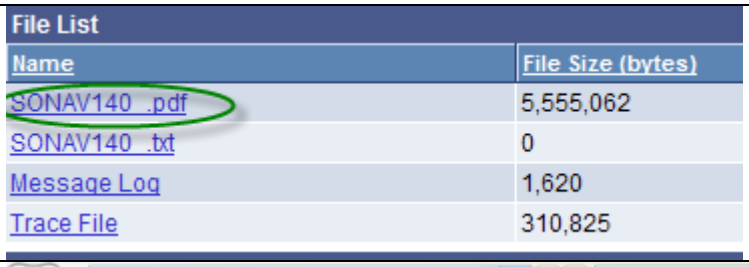
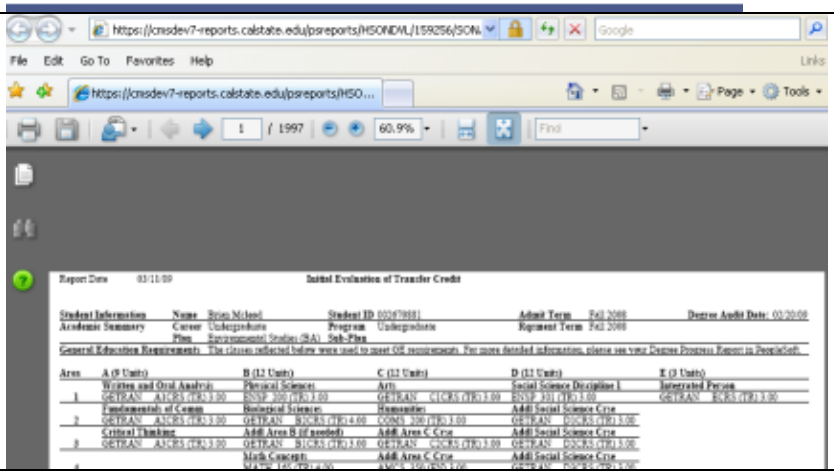
&

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

Step	Action	Screenshot
1	Navigate to the Student Services Center and enter the emplid in the ID field, or search by last name and first name Click Search	

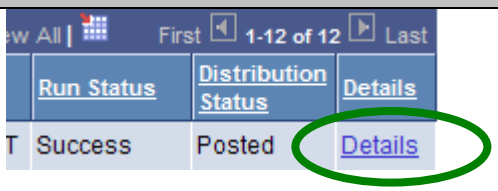
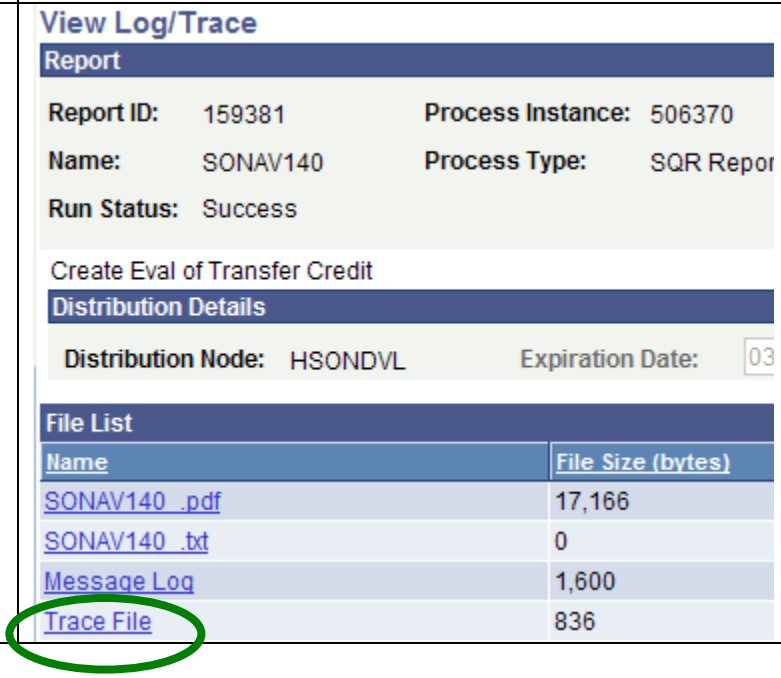
2	Click on “Academic Requirements” under other academic and click the double arrow to run the ARR	
4	You have now generated an ARR for the student.	Note: If a new ARR is not generated, there will be no data, or old data for the Evaluation of Transfer Credit report.
5	Now navigate to:	SON Customizations > SON Campus Solutions > Advising > Reports > Eval of Transfer Credit Rpt

6	**Search** for a Run Control ID to use (any you have created will work)	
7	Academic Institution: SOCMP	
8	As of Date: Always put in today's date, or you will get old reports that may not be current	
9	Report Request Criteria: Select Student Emplid	
10	Type in the student's emplid (9 digits)	
11	Click Run	
12	On the Process Scheduler Request page, select PSUNX under Server Name	
13	Click OK	
14	Click on the Process Monitor to view the	

	status of your process	
15	Your report will be ready once the Run Status says “Success” and the Distribution Status says Posted. Click on Details	
16	Click on SONAV140.pdf to retrieve your report	
17	The PDF file will pop out into a different window and is ready to print Note: Most reports will be more than one page per student.	

Lesson 5: Troubleshooting

Reading the Error report – Each time you run the Evaluation of Transfer Credit report, there will be an error report that can help you determine which students did not receive a report

Step	Action	Screenshot
1	In Lesson 3, you learned that you click on the “Details” link in the Process Monitor to pick up your ETC reports. This is also the place to go to pick up your Error report (Trace file) Click on “Details”	
2	Click on “Trace File” The Trace File is your error report.	

3	The report will have a summary of:	Total Number of Records Processed = This is the number of students that were in your request Number of Records in Error = The Number of students that did not receive an ETC report Number of Records without Error = The number of students that did receive an ETC report which was the .pdf file
4	The report will list all emplids that did NOT receive a report	By Program: UGRD Plan CHEM-BS AdmTerm 2087 Selecting emplids for Major CHEM-BS Transfer Credit in Degree Audit not found for 002747711 Transfer Credit in Degree Audit not found for 002780601 Transfer Credit in Degree Audit not found for 002785099
5	Note: This report will only run for Transfer Students. See FAQ's below if you did not receive a report for a student.	

FAQ'S:

Question: I ran the process for a student, but when I checked the Process Monitor, there wasn't a .pdf file available. Why is it missing?

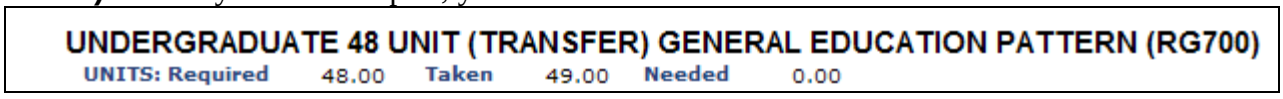
Answer: The Evaluation of Transfer Credit may be missing if the student is not a Transfer Student. The report will not run for native students that are on the 51 unit GE pattern?

Question: How do I check to see if the student is a Transfer Student?

Answer: Transfer students are identified by being in the "VTRG" Student Group, which means they are on the 48 unit GE Transfer pattern.

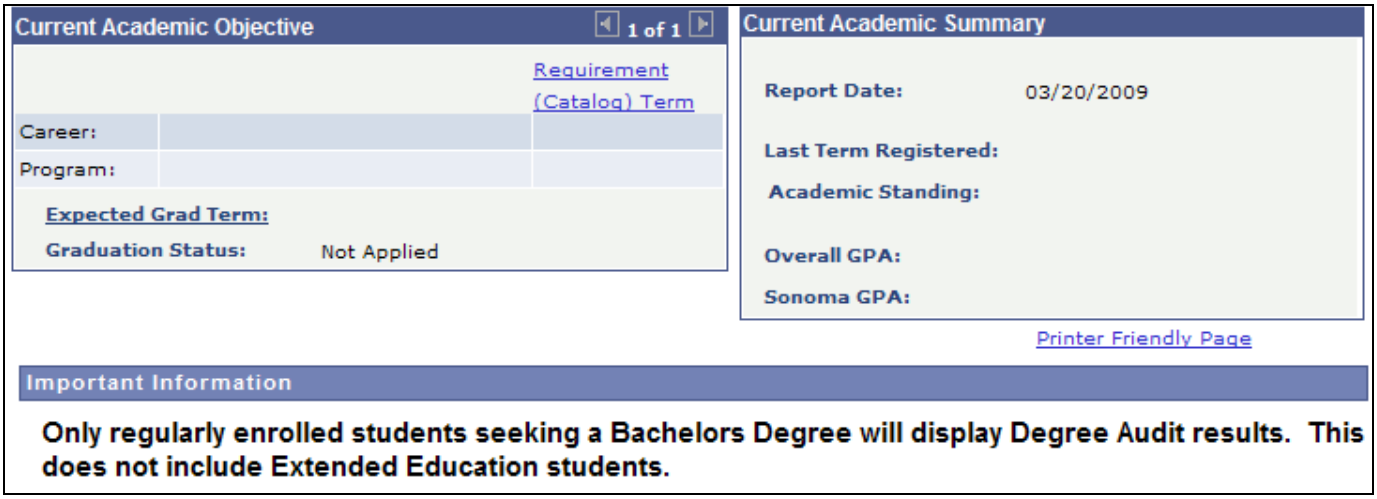
To check this:

1) Run an ARR for the student.
2) Midway down the report, you should see this text:



3) If you do not see this line of text, then the student is not in the VTRG Student Group, and therefore not identified by PeopleSoft as a transfer student. The Evaluation of Transfer Credit checks for "RG700". Students that are on the 51 unit GE pattern will not receive a report.

Question: I ran an ARR to check to see if the student was a Transfer Student, but I got this message instead of the regular ARR.



Answer: Students that receive this message on their ARR may not be currently enrolled in a degree-seeking program. The ETC will not generate for non UGRD students.

Lesson 6: Security

This lesson is for CMS Functional leads only

Note that any staff member attempting run the Generate Report Requests from Lessons 1 and 2 will need row level security access as follows:
Set up SACR: Security > Secure Student Administration > User ID > Advisement Report Security

User will need access to report type = CARR.