Producing Batch Transcripts for Student Groups

OBJECTIVE: Provides an overview for producing and printing batches of transcripts for specific student groups in PeopleSoft.
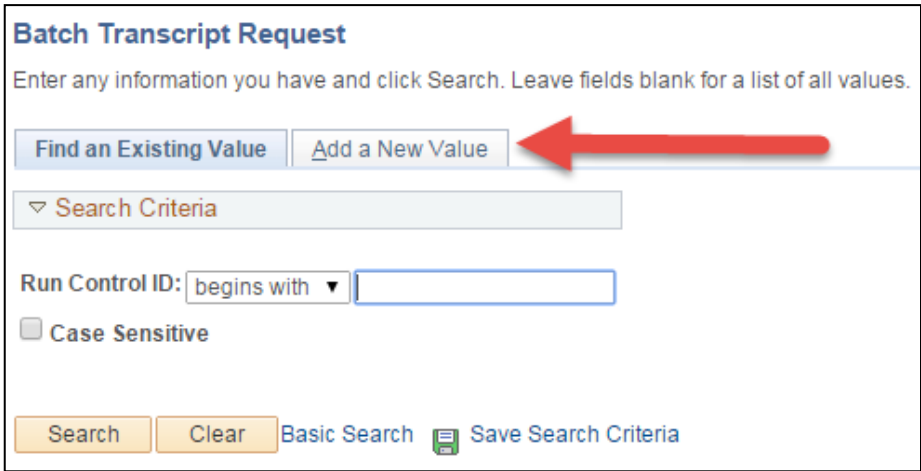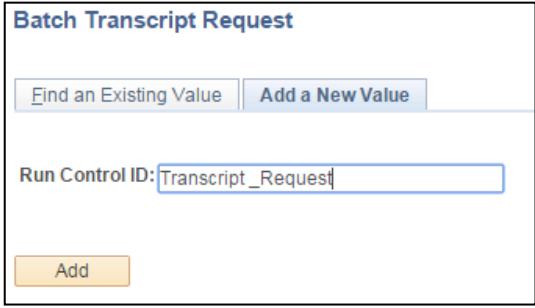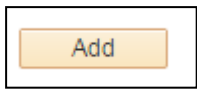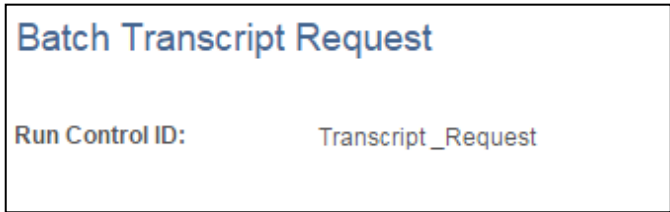
CONTENTS:

NEED ADDITIONAL INFORMATION?

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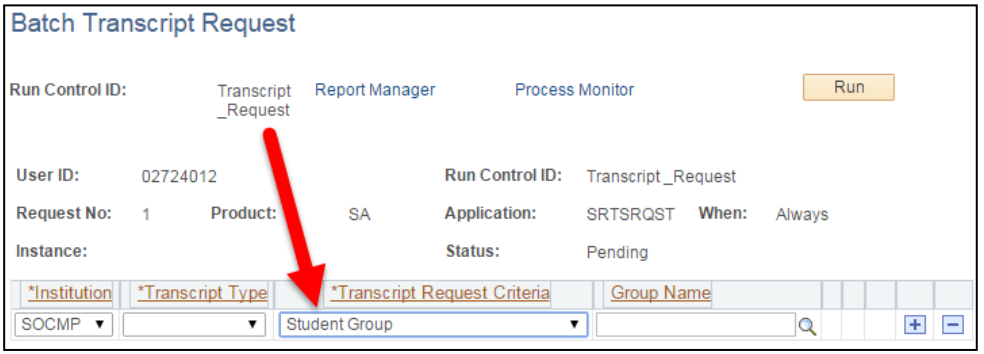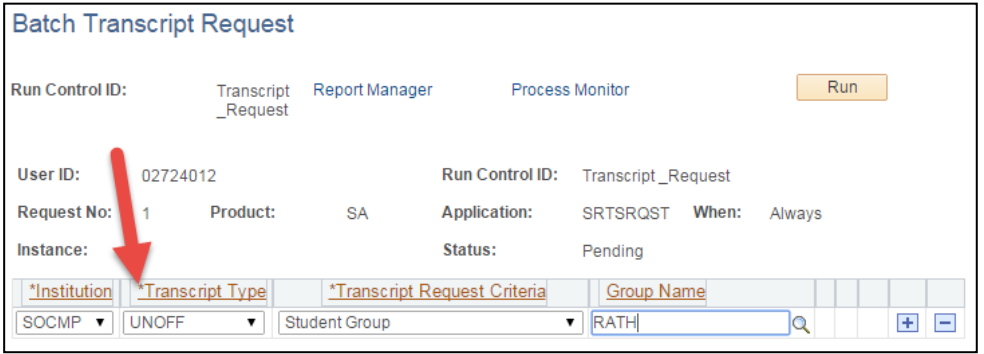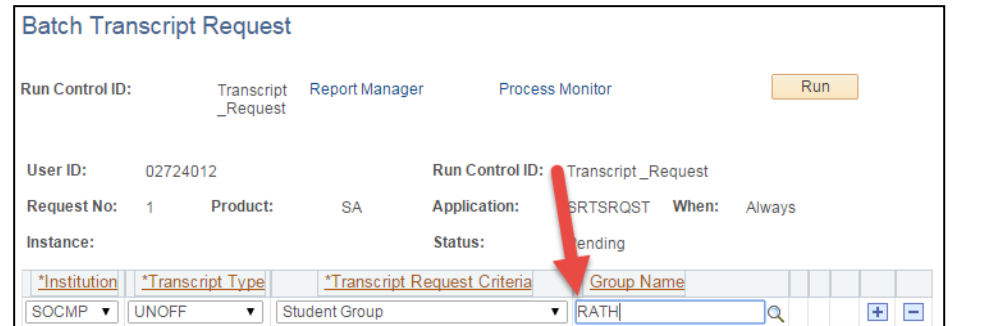http://www.sonoma.edu/it/cms/contact.html to locate the
STUDENT RECORDS FUNCTIONAL LEAD.

Lesson 1: Creating a Run Control
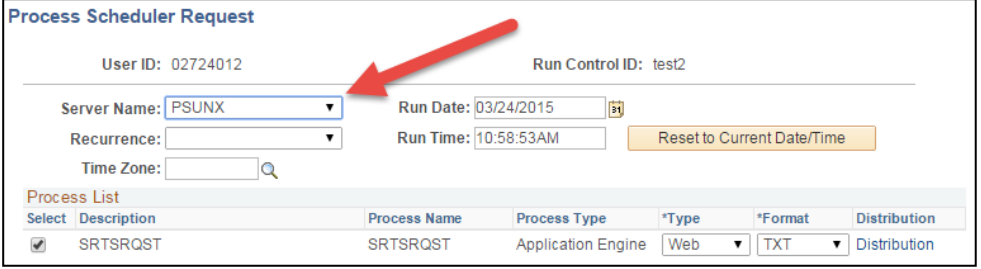
Navigation: Main Menu > Records and Enrollment > Transcripts > Batch Transcripts > Batch Transcript Request
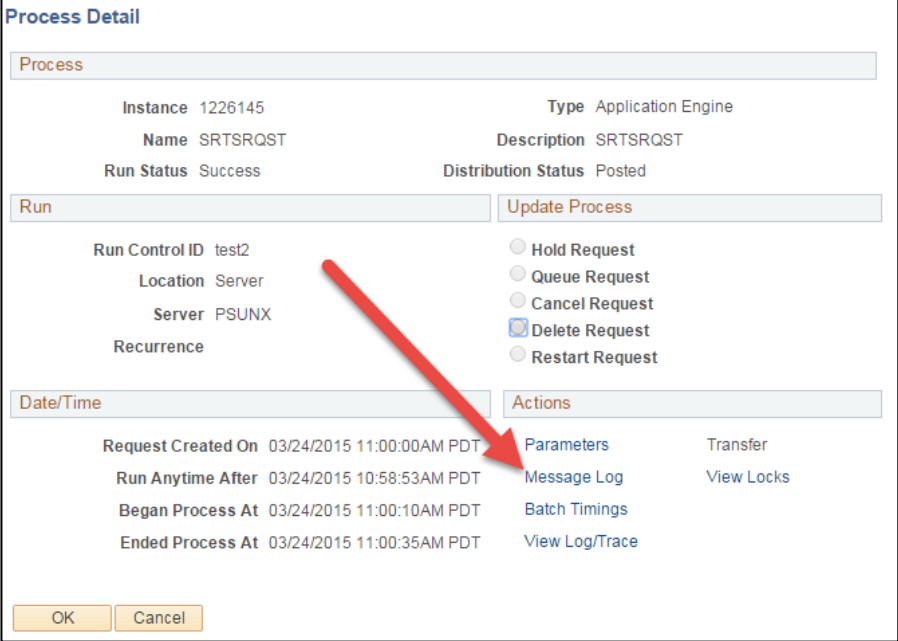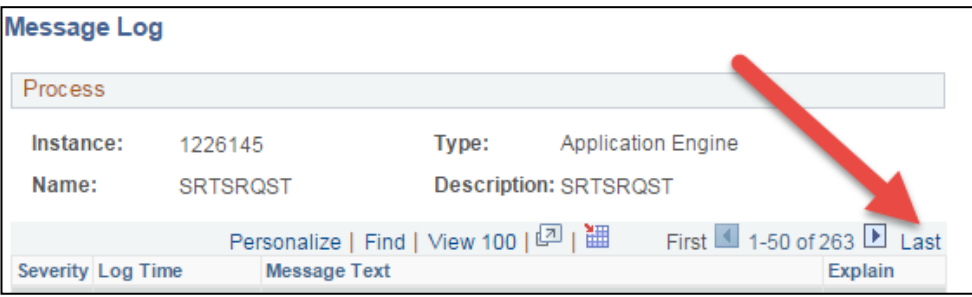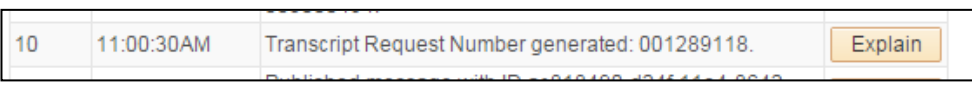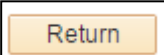
Step	Action	Screenshot
1	The first time a batch transcript is generated, a Run Control must be created. The same Run Control can be used every time you wish to generate more transcripts in a batch. Therefore, **for the first time only,** click **Add a New Value.** (Subsequent times a batch transcript is generated simply enter the name of the Run Control or click **Search** to select the appropriate one.)	**Batch Transcript Request** 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 ▼ ☐ Case Sensitive Search Clear Basic Search 💾 Save Search Criteria
2	Enter the desired name for the Run Control. Suggested names include your last name or Transcript_Request (no spaces are allowed in the name of a Run Control).	**Batch Transcript Request** Find an Existing Value Add a New Value Run Control ID: Transcript_Request Add
3	Click the yellow **Add** button.	Add
4	The Run Control for Batch Transcript Request appears.	**Batch Transcript Request** Run Control ID: Transcript _Request

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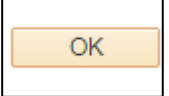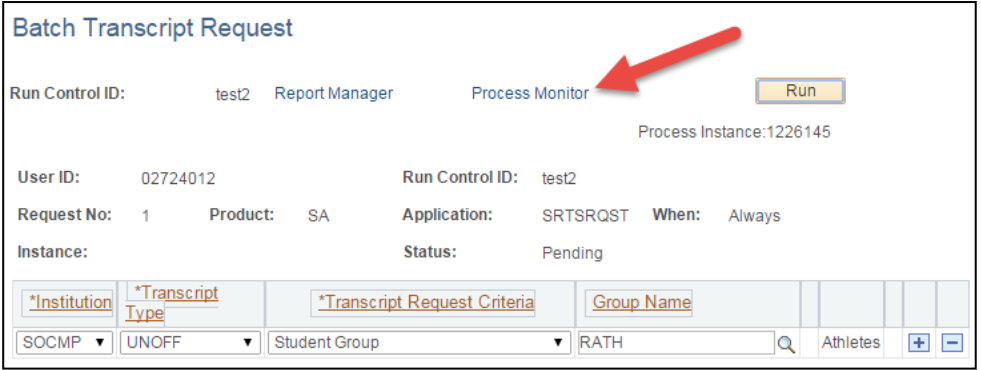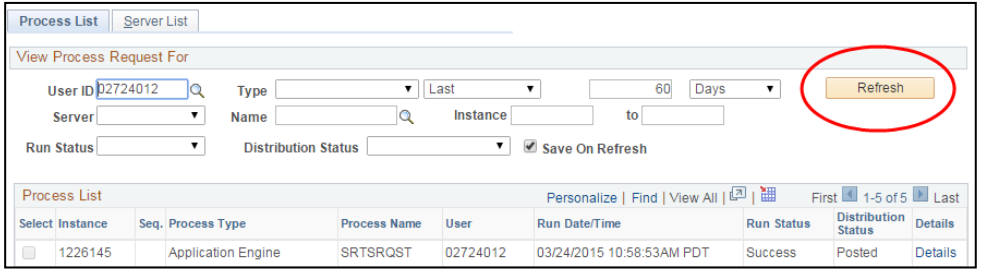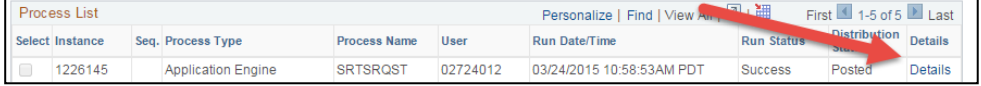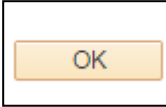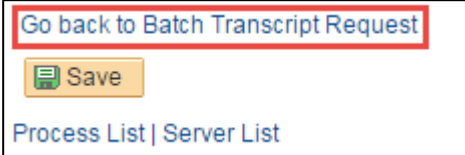
Lesson 2: Batch Transcripts Request

Navigation: Main Menu > Records and Enrollment > Transcripts > Batch Transcript Request

Step	Action	Screenshot
1	The Batch Transcript Request page defaults to "Career/Program/Plan" as the Transcript Criteria. Using the down arrow, change the criteria to Student Group.	**Batch Transcript Request** Run Control ID: Transcript _Request Report Manager Process Monitor Run User ID: 02724012 Run Control ID: Transcript _Request Request No: 1 Product: SA Application: SRTSRQST When: Always Instance: Status: Pending *Institution *Transcript Type *Transcript Request Criteria Group Name SOCMP ▼ ▼ Student Group ▼ 🔍 ➕ ➖
2	Using the down arrow, select the Transcript Type of UNOFF (unofficial).	**Batch Transcript Request** Run Control ID: Transcript _Request Report Manager Process Monitor Run User ID: 02724012 Run Control ID: Transcript _Request Request No: 1 Product: SA Application: SRTSRQST When: Always Instance: Status: Pending *Institution *Transcript Type *Transcript Request Criteria Group Name SOCMP ▼ UNOFF ▼ Student Group ▼ RATH 🔍 ➕ ➖
3	Select the appropriate Student Group, e.g.: RATH for Athletes To learn the names of the Student Groups, click the magnifying glass and then the word Lookup.	**Batch Transcript Request** Run Control ID: Transcript _Request Report Manager Process Monitor Run User ID: 02724012 Run Control ID: Transcript _Request Request No: 1 Product: SA Application: SRTSRQST When: Always Instance: Status: ending *Institution *Transcript Type *Transcript Request Criteria Group Name SOCMP ▼ UNOFF ▼ Student Group ▼ RATH 🔍 ➕ ➖

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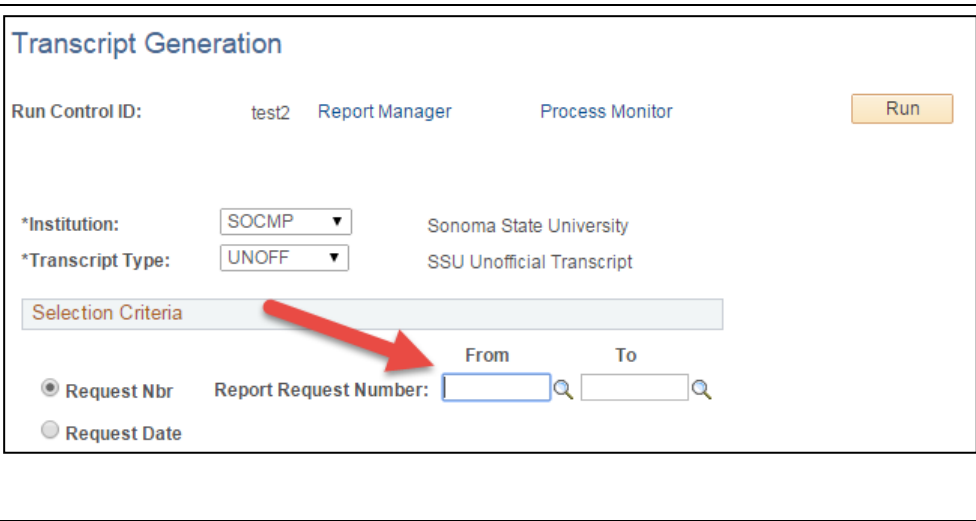| 4	Click the RUN button.	
5	Make sure the Server Name is PSUNX.	**Process Scheduler Request** User ID: 02724012 Run Control ID: test2 Server Name: PSUNX Run Date: 03/24/2015 Recurrence: Run Time: 10:58:53AM Reset to Current Date/Time Time Zone: **Process List** Select | Description | Process Name | Process Type | *Type | *Format | Distribution ☑ | SRTSRQST | SRTSRQST | Application Engine | Web | TXT | Distribution
6	Click the OK button.	
7	Click on the Process Monitor link.	**Batch Transcript Request** Run Control ID: test2 Report Manager Process Monitor Run Process Instance:1226145 User ID: 02724012 Run Control ID: test2 Request No: 1 Product: SA Application: SRTSRQST When: Always Instance: Status: Pending *Institution | *Transcript Type | *Transcript Request Criteria | Group Name SOCMP | UNOFF | Student Group | RATH Athletes
8	Click the Refresh button until the process runs to success and Status changes to Posted.	**Process List** Server List View Process Request For User ID 02724012 Type Last 60 Days Refresh Server Name Instance to Run Status Distribution Status ☑ Save On Refresh Process List Personalize | Find | View All | First 1-5 of 5 Last Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details ☐ | 1226145 | | Application Engine | SRTSRQST | 02724012 | 03/24/2015 10:58:53AM PDT | Success | Posted | Details
9	Click the Details link.	Process List Personalize | Find | View All First 1-5 of 5 Last Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details ☐ | 1226145 | | Application Engine | SRTSRQST | 02724012 | 03/24/2015 10:58:53AM PDT | Success | Posted | Details

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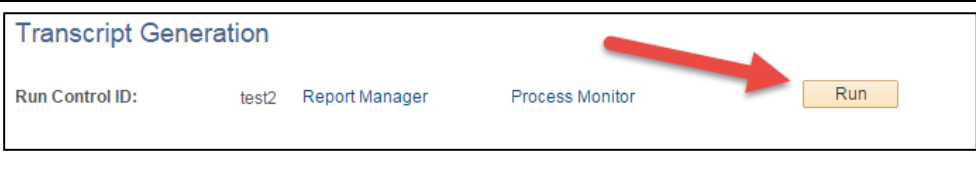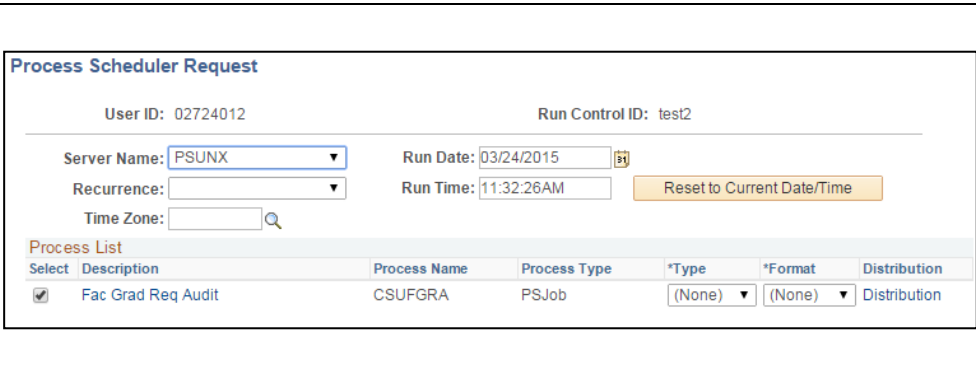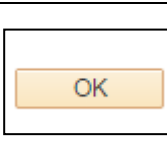Last Updated: 3/24/15

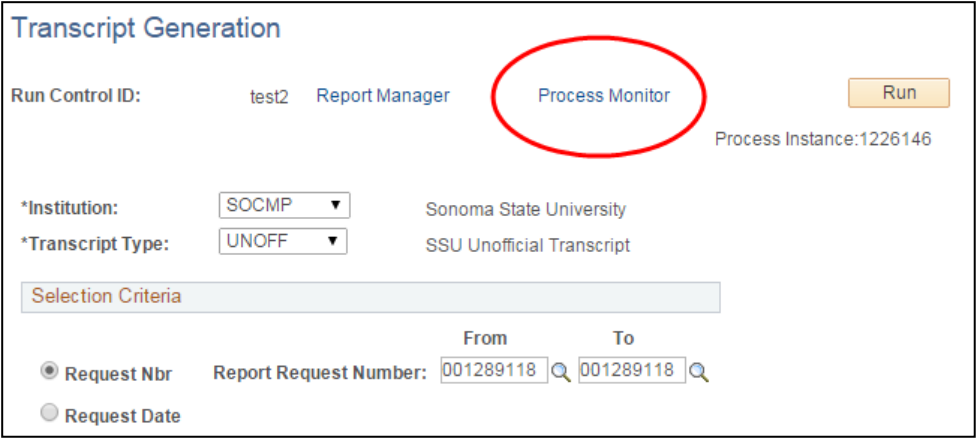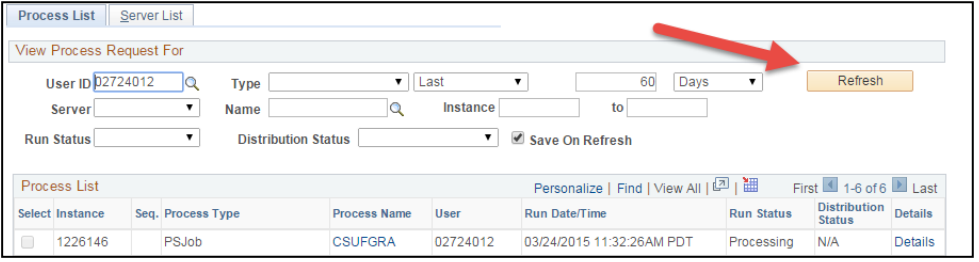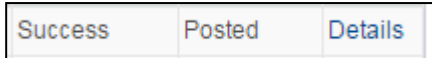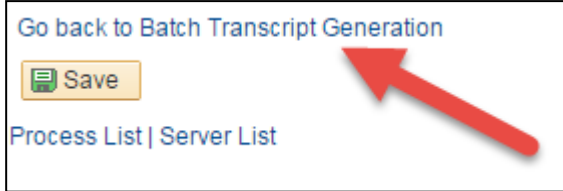| 10	Click the Message Log link.	**Process Detail** **Process** Instance 1226145 — Type Application Engine Name SRTSRQST — Description SRTSRQST Run Status Success — Distribution Status Posted **Run** / **Update Process** Run Control ID test2 — ○ Hold Request Location Server — ○ Queue Request Server PSUNX — ○ Cancel Request Recurrence — ○ Delete Request — ○ Restart Request **Date/Time** / **Actions** Request Created On 03/24/2015 11:00:00AM PDT — Parameters — Transfer Run Anytime After 03/24/2015 10:58:53AM PDT — Message Log — View Locks Began Process At 03/24/2015 11:00:10AM PDT — Batch Timings Ended Process At 03/24/2015 11:00:35AM PDT — View Log/Trace OK — Cancel
11	If there are more than 100 students in the Student Group, you will need to click on the **Last** button.	**Message Log** **Process** Instance: 1226145 — Type: Application Engine Name: SRTSRQST — Description: SRTSRQST Personalize | Find | View 100 | 🗗 | 🏢 — First ◀ 1-50 of 263 ▶ Last Severity Log Time — Message Text — Explain
12	After clicking the Last button, scroll down to find the **Transcript Request Number**.	10 | 11:00:30AM | Transcript Request Number generated: 001289118. | Explain
13	Write down the Transcript Request Number.	001289118
14	Click the Return button.	Return

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15	Click the OK button	OK
16	Click on "Go Back to Transcript Request" to generate transcripts.	Go back to Batch Transcript Request Save Process List | Server List

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Lesson 3: Batch Transcript Generation

Navigation: Main Menu > Records and Enrollment > Transcripts > Batch Transcripts > Batch Transcript Generation
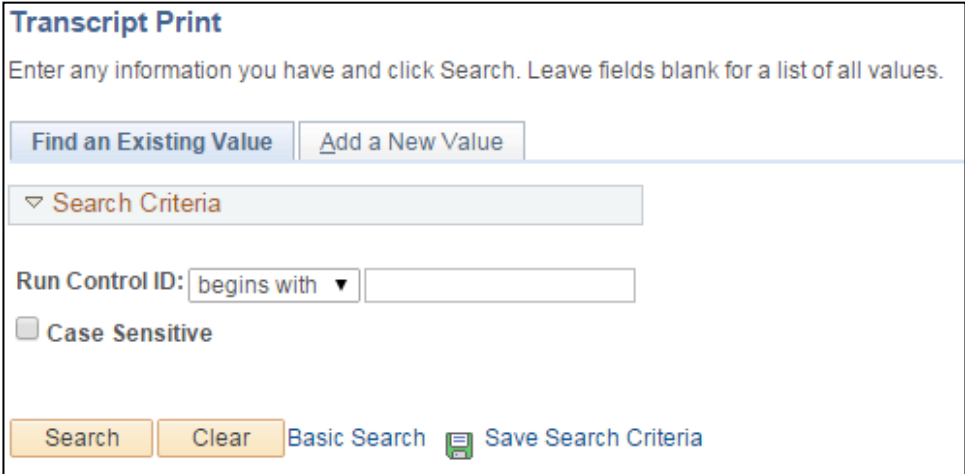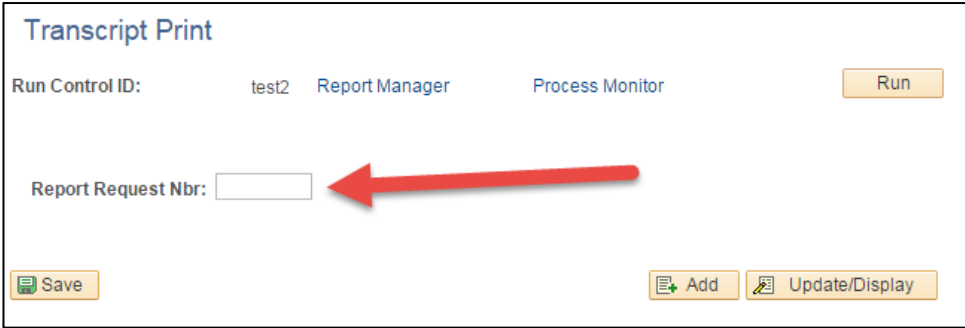
Step	Action	Screenshot
1	Find the run control that you are using for this process by clicking on the **Search** button. (The same run control from Lesson 2 can be used.)	**Batch Transcript Generation** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value | Add a New Value ▽ Search Criteria Run Control ID: begins with ▼ [____] ☐ Case Sensitive Search Clear Basic Search 🖫 Save Search Criteria
2	Using the down arrow, select UNOFF as the Transcript Type.	**Transcript Generation** Run Control ID: test2 Report Manager Process Monitor [Run] *Institution: SOCMP ▼ Sonoma State University *Transcript Type: UNOFF ▼ SSU Unofficial Transcript Selection Criteria From To ◉ Request Nbr Report Request Number: [____]🔍 [____]🔍 ○ Request Date

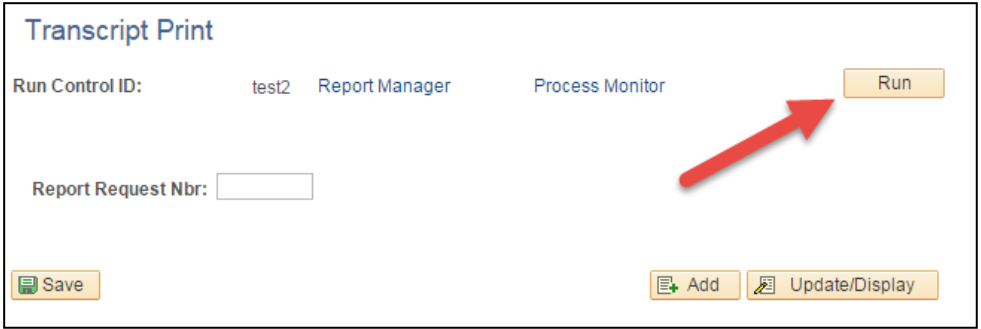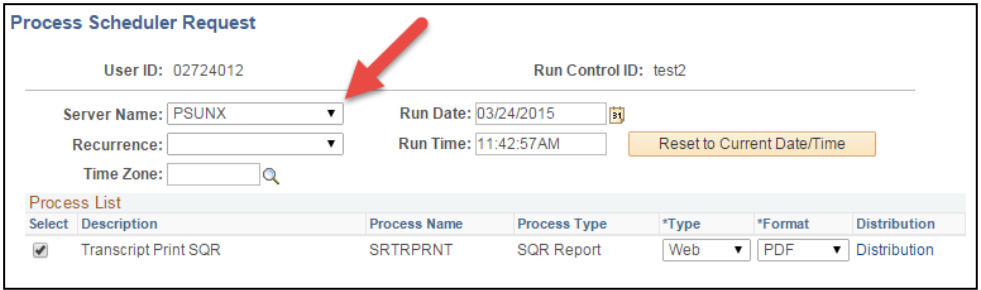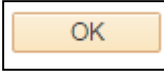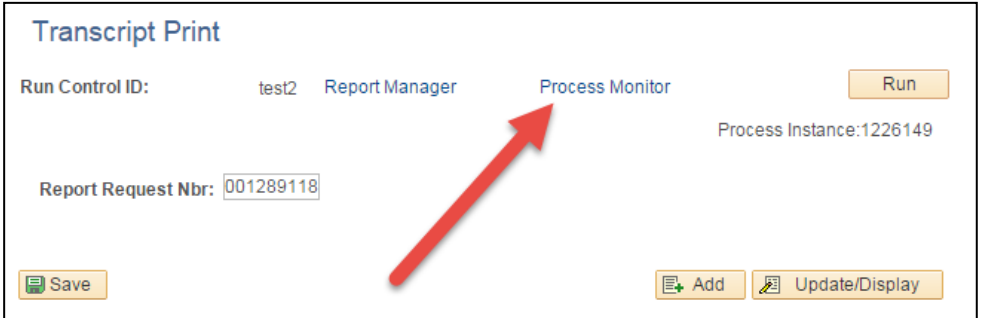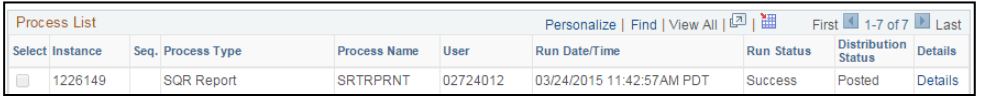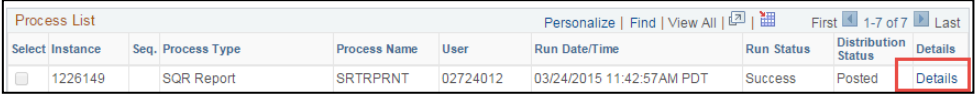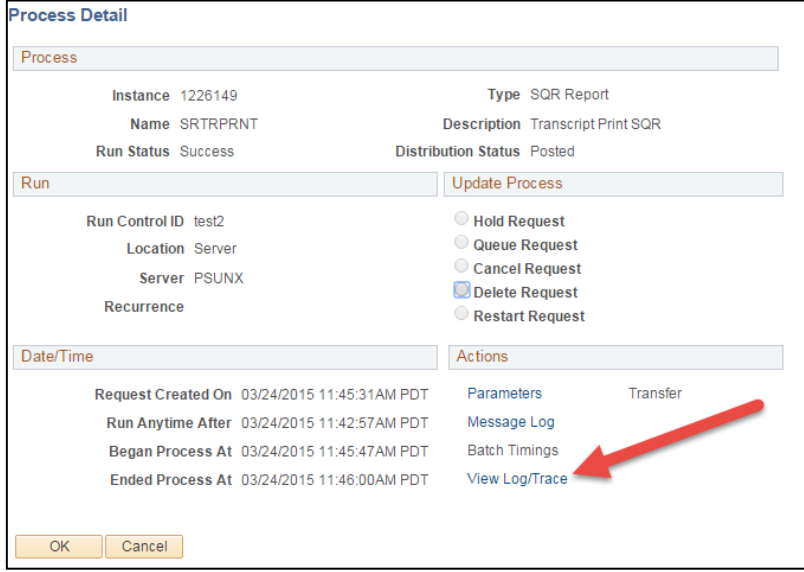| 3 | Enter the Report Request Number into the From box and click the tab key; the To box will auto-fill. | **Transcript Generation**

Run Control ID: test2   Report Manager   Process Monitor   [Run]

*Institution: [SOCMP ▼]   Sonoma State University
*Transcript Type: [UNOFF ▼]   SSU Unofficial Transcript

Selection Criteria

From   To
◉ Request Nbr   Report Request Number: [____] 🔍 [____] 🔍
○ Request Date |
4	Click the Run button	**Transcript Generation** Run Control ID: test2 Report Manager Process Monitor [Run]
5	Make sure Server Name is PSUNX	**Process Scheduler Request** User ID: 02724012 Run Control ID: test2 Server Name: [PSUNX ▼] Run Date: 03/24/2015 📅 Recurrence: [____ ▼] Run Time: 11:32:26AM [Reset to Current Date/Time] Time Zone: [____] 🔍 Process List Select Description Process Name Process Type *Type *Format Distribution ☑ Fac Grad Req Audit CSUFGRA PSJob [(None) ▼] [(None) ▼] Distribution
6	Click the OK button.	[OK]

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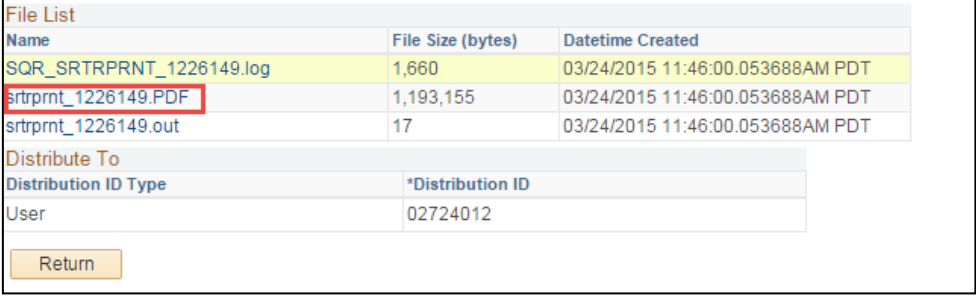
7	Click the Process Monitor link.	**Transcript Generation**
		Run Control ID: test2 Report Manager **Process Monitor** [Run]
		Process Instance:1226146
		*Institution: SOCMP ▼ Sonoma State University
		*Transcript Type: UNOFF ▼ SSU Unofficial Transcript
		Selection Criteria
		From To
		● Request Nbr Report Request Number: 001289118 🔍 001289118 🔍
		○ Request Date
8	Click the Refresh button.	Process List | Server List
		View Process Request For
		User ID 02724012 🔍 Type [▼] Last [▼] 60 Days [▼] [Refresh]
		Server [▼] Name [ ] 🔍 Instance [ ] to [ ]
		Run Status [▼] Distribution Status [▼] ☑ Save On Refresh
		Process List Personalize | Find | View All | 🖵 | 🔲 First ◀ 1-6 of 6 ▶ Last
		Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details
		☐ 1226146 | | PSJob | CSUFGRA | 02724012 | 03/24/2015 11:32:26AM PDT | Processing | N/A | Details
9	Refresh until Run Status is Successful and Distribution Status is Posted.	Success Posted Details
10	Click on the "Go Back to Transcript Generation" link.	Go back to Batch Transcript Generation
		💾 Save
		Process List | Server List

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Lesson 4: Transcript Print

Navigation: Main Menu > Records and Enrollment > Transcripts > Batch Transcripts > Transcript Print

Step	Action	Screenshot
1	Find the run control that you are using for this process by clicking on the Search button. (You can use the same run control you used in Lesson 2 and 3.)	**Transcript Print** 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 ▼] [ ] ☐ Case Sensitive Search | Clear | Basic Search | 🖫 Save Search Criteria
2	Enter the Transcript Request Number in the Report Request Nbr field.	**Transcript Print** Run Control ID: test2 Report Manager Process Monitor [Run] Report Request Nbr: [ ] 🖫 Save 📑+ Add 📄 Update/Display

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3	Click the Run button.	**Transcript Print** Run Control ID: test2 Report Manager Process Monitor [Run] Report Request Nbr: [ ] [Save] [Add] [Update/Display]
4	Make sure the Server Name is PSUNX. Make sure Type is Web and Format is PDF.	**Process Scheduler Request** User ID: 02724012 Run Control ID: test2 Server Name: PSUNX ▼ Run Date: 03/24/2015 Recurrence: ▼ Run Time: 11:42:57AM [Reset to Current Date/Time] Time Zone: [ ] 🔍 Process List Select Description Process Name Process Type *Type *Format Distribution ☑ Transcript Print SQR SRTRPRNT SQR Report Web ▼ PDF ▼ Distribution
5	Click the OK button.	[OK]
6	Click the Process Monitor link.	**Transcript Print** Run Control ID: test2 Report Manager Process Monitor [Run] Process Instance:1226149 Report Request Nbr: 001289118 [Save] [Add] [Update/Display]
7	Refresh until Run Status is Successful and Distribution Status is Posted.	Process List Personalize | Find | View All | 🔲 | 🔳 First ◀ 1-7 of 7 ▶ Last Select Instance Seq. Process Type Process Name User Run Date/Time Run Status Distribution Status Details ☐ 1226149 SQR Report SRTRPRNT 02724012 03/24/2015 11:42:57AM PDT Success Posted Details

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8	Click the Details link.	
9	Click the View Log/Trace link.	
10	Click the .pdf link. The file will open in Adobe Acrobat.	
11	To print or save the transcripts, click on the icons at the top left of the adobe document.	

Step 8:

Process List

Personalize | Find | View All | 📄 | 🔢   First ◄ 1-7 of 7 ► Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	1226149		SQR Report	SRTRPRNT	02724012	03/24/2015 11:42:57AM PDT	Success	Posted	Details

Step 9:

Process Detail

Process

Instance 1226149   Type SQR Report
Name SRTRPRNT   Description Transcript Print SQR
Run Status Success   Distribution Status Posted

Run   Update Process

Run Control ID test2   ○ Hold Request
Location Server   ○ Queue Request
Server PSUNX   ○ Cancel Request
Recurrence   ☑ Delete Request
                                        ○ Restart Request

Date/Time   Actions

Request Created On 03/24/2015 11:45:31AM PDT   Parameters   Transfer
Run Anytime After 03/24/2015 11:42:57AM PDT   Message Log
Began Process At 03/24/2015 11:45:47AM PDT   Batch Timings
Ended Process At 03/24/2015 11:46:00AM PDT   View Log/Trace

OK   Cancel

Step 10:

File List

Name	File Size (bytes)	Datetime Created
SQR_SRTRPRNT_1226149.log	1,660	03/24/2015 11:46:00.053688AM PDT
srtrprnt_1226149.PDF	1,193,155	03/24/2015 11:46:00.053688AM PDT
srtrprnt_1226149.out	17	03/24/2015 11:46:00.053688AM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	02724012

Return

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