BASIC STUDENT RECORDS AND INQUIRY

OVERALL DEPARTMENTAL BUSINESS PROCESS GUIDE

Document Title: **OVERALL DEPARTMENTAL BPG v9.0**

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Date	By	Action	Pages
04/16/2007	Mary Chouinard & Amy Braceros	Initial Document	All
01/30/2012	Mary Chouinard & Amy Braceros	9.0 Upgrade	All
09/17/2014	ACBI D. Selva	Update Cover	1

Icon Key

= **Specific Notes/ Business Rules**

= **Reminders**

= **Important info**

, = **General Process info notes**

= **Links to specific pages within BPG**

= **Additional Links** – hyperlinks available to additional pages listed at the bottom of CMS Pages.

Departmental Overall BPG

Logging Into PeopleSoft

1. Go to – https://mycoyote.cms.csusb.edu

2. Enter you User ID and Password

3. Click Sign In

4. After logging in make sure you are on the Administrative Systems tab

5. Click on PS HCM 9.0 to access system

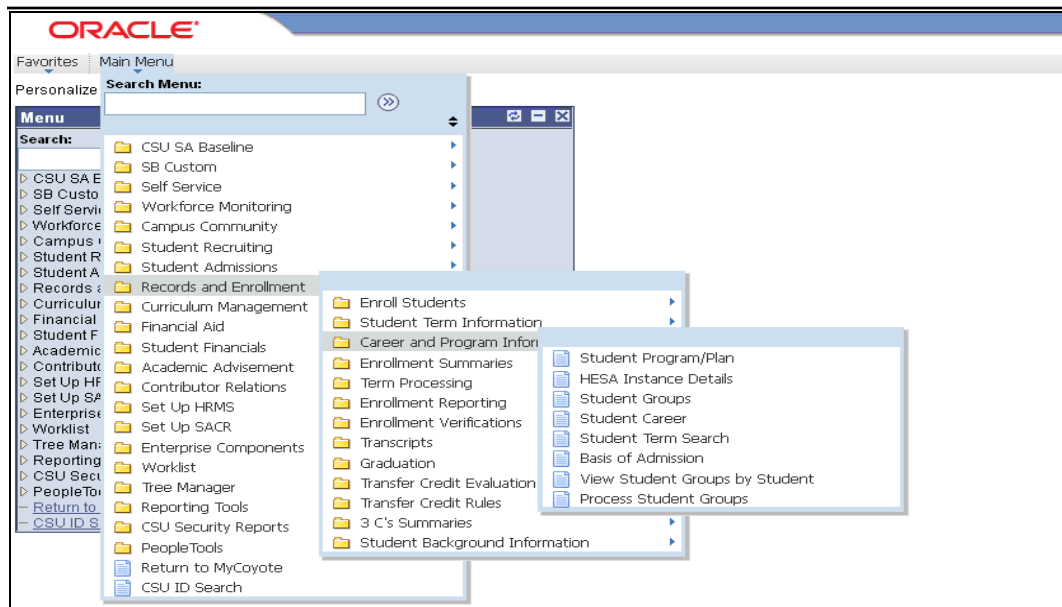**6.** Your menu options will display

Navigation

The navigation in v9.0 consists of "breadcrumbs" across the screen.

1. Start by clicking on Main Menu at the top of the page and then click on the appropriate folders until you locate the appropriate page. The navigation below goes from Main Menu → Records & Enrollment → Career and Program Information.
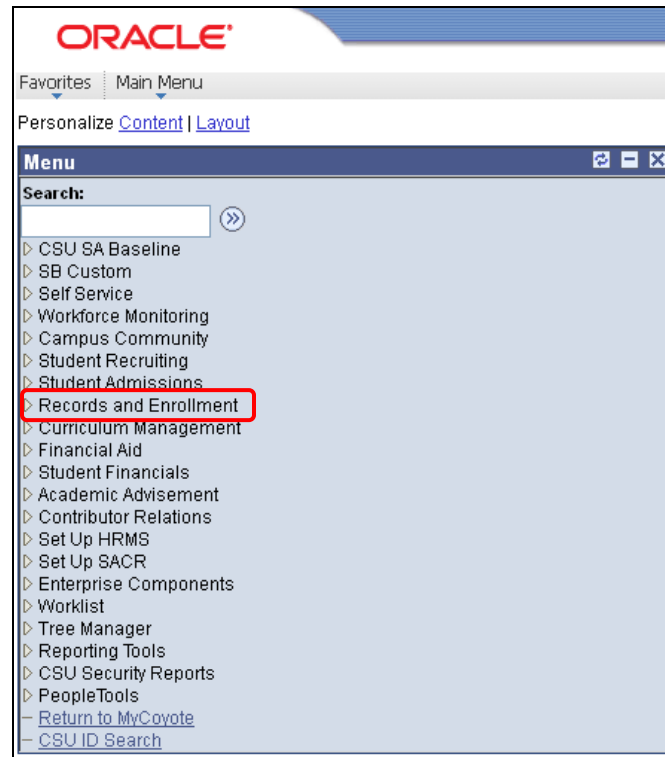

2. Once a page is selected in the Career & Program menu options, that screen will appear.
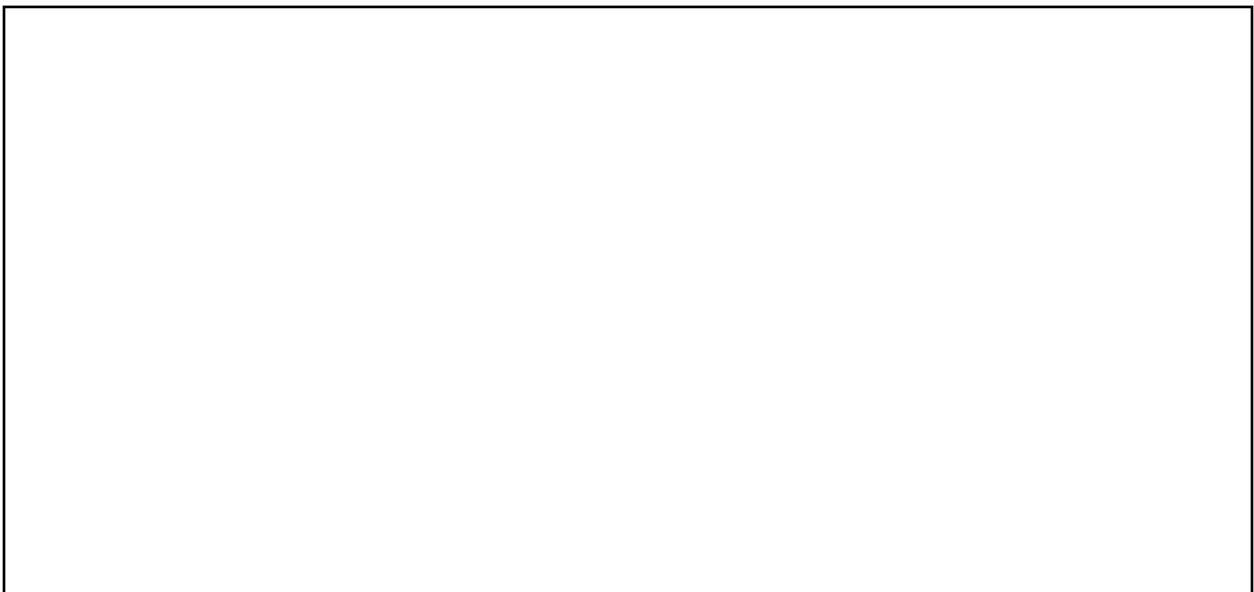
3. You can still use the menu on the left side, but you will have a view of all menus in the category and their pages/submenus.

4. Once you navigate to Records and Enrollment in the left hand menu above, this is the screen shot that will display. You can then navigate through the folders for your information.

Creating Favorites in PeopleSoft

If there is a screen that you will use often, you can save it to "Favorites".

1. **Navigate** to the screen you would like to add to your Favorites

2. **Click** Add to Favorites at the top of the menu.

3. The screen name defaults as the page description.

4. You can modify the description to display something that is more recognizable for your use such as – Student Major.

5. **Click** [OK] to add to favorites and then again to acknowledge that the favorite has been saved.

6. You can repeat this process for every screen that you navigate to regularly.

7. Access Favorites by selecting "Favorites" from the header bar

8. Two separate menus will display

- Recently Used – Select one of these pages you have recently used and you will navigate directly to that screen

- My Favorites – Select one of the favorites that you have saved and you will navigate directly to that screen
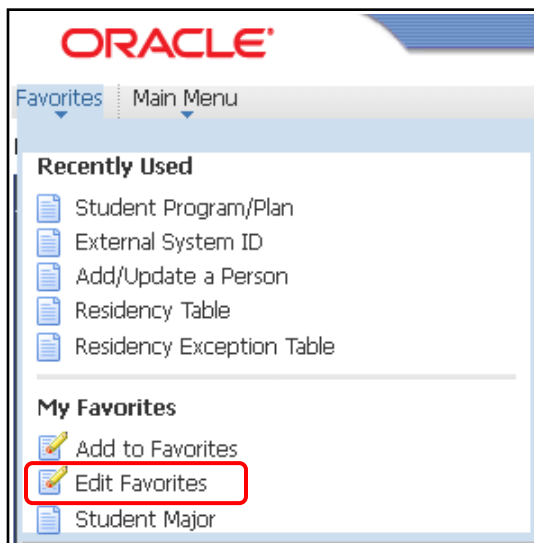
9. You can edit your favorites (favorite name, sequence/display order, or delete) by selecting Edit Favorites
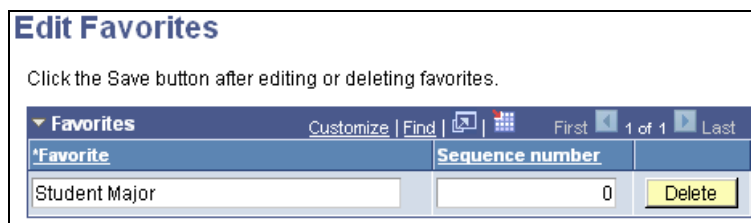
User Defaults

Navigation – Main Menu → Set Up SACR → User Defaults

Certain information appears on most pages. Quite often there is only one value or there is one value you use most often. You can set those values to default so you don't have to add them each time you access most screens. These are your own personal defaults that go along with your EMPLID. You will see your User ID and Name on each tab

1. **User Defaults 1 –** The most common setting here would be SBCMP in Academic Institution, Career Group SetID and Facility Group SetID. You can set other defaults on this page if the information is always or most often used by you in accessing information. The values can always be updated, or you can override them on any page of information you go to if you default value doesn't fit your needs.

2. User Defaults 4 – This page has important default settings.

- If you ☑ Carry ID, you will not have to re-enter a students ID when you go from page to page.

- Set your Output Destination to "Printer" and your Transcript Type to the type that you will be most often using. For most users, that would be UNOFF (Unofficial) You can only select values for which you have security.

Look through each of the tabs and set as preferred for your use in PeopleSoft.

CSU ID Search

Navigation – Main Menu → CSU ID Search

1. Search Criteria – Enter an EmplID, National ID (SSN) or First and Last Name to conduct a search

2. Click Search

3. Reading Information – This person has 4 lines of information –

- Line 1 is an applicant – this means an application has been submitted for a position at the University

- Line 2 is an employee who is inactive in a student (student assistant) classification

- Line 3 is an employee who is active in a regular classification

- Line 4 shows "CS Person". This is the designation for a student at the University

4. **Click on the hyperlink Detail on line 4 which corresponds with the actual student classification if you have security to Campus Community Add/Update a Person**

Campus Community – Biographical Information

Navigation – Main Menu → Campus Community → Personal Information (Student) → Add/Update a Person (this is where you will automatically go if you click the Detail hyperlink on the CSU ID Search and have the appropriate access)

1. **Biographical Information** – This brings you to the biographical information pages. To view all Names and Addresses click on their hyperlinks.

2. Things to remember –

- **Name types** – Each person has a Primary and a Preferred name. Some individuals may have additional name types as necessary.

   o   If this is a student only, the information is maintained by the Office of Records, Registration & Evaluations.

- o If this is an employee only, the information is maintained by the appropriate Human Resources Office.

- o If this is a student and an employee, the Primary is maintained by Human Resources and the Preferred name is maintained by Records, Registration & Evaluations.

- **Address types** –

  - o **Home** – This address belongs to the appropriate Human Resources Office. Students will not be allowed to update this address through MyCoyote but will be required to make any changes through the appropriate Human Resources Office.

  - o **Permanent** – This address belongs to the Office of Records, Registration & Evaluations. Students will be allowed to update this address through MyCoyote, but may not delete the address.

  - o **Mailing** – This is a shared address – students will be allowed to update this address through MyCoyote.

  - o **Diploma** – This is the address the Office of Records, Registration & Evaluations uses to identify where the student wants their diploma mailed – students will be allowed to update this address through MyCoyote.

  - o **SEVIS Foreign** – This address belongs to the Office of Records, Registration & Evaluations, but is maintained by the International Center – students will not be allowed to update this address through MyCoyote.

  - o **SEVIS Domestic** – This address belongs to the Office of Records, Registration & Evaluations, but is maintained by the International Center – students will not be allowed to update this address through MyCoyote.

- **Phone types** –

  - o **Home** – This phone number belongs to the appropriate Human Resources Office. This can be updated but cannot be deleted through MyCoyote.

  - o **Permanent** – This phone number belongs to the Office of Records, Registration & Evaluations. It can be updated through MyCoyote, but cannot be deleted.

  - o **Business –** Shared among offices. It can be updated through MyCoyote.

  - o **Mobile –** Shared among offices – It can be updated through MyCoyote.

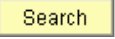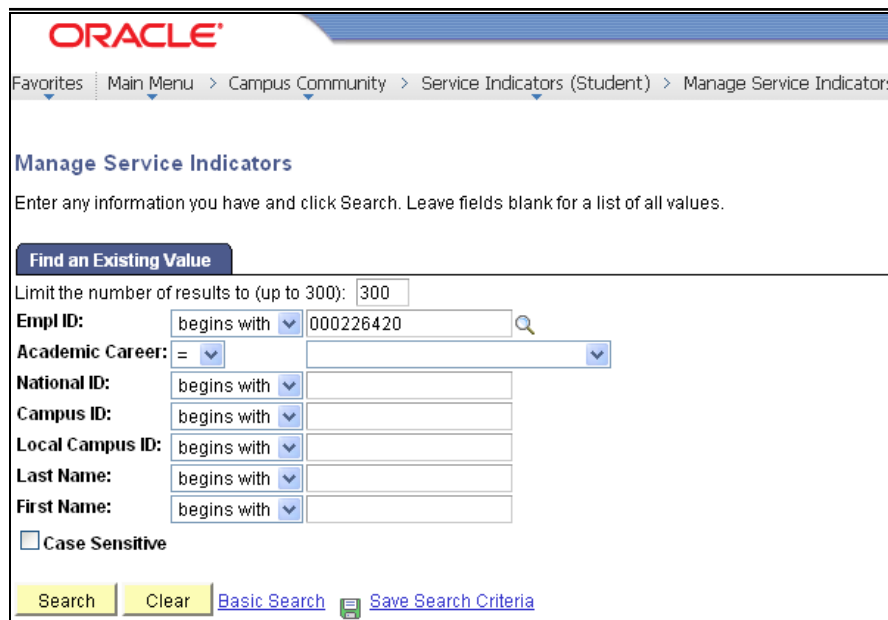 - o **Main –** Shared among offices. It can be updated through MyCoyote.

- **Email Address types** –

  o **On-Campus** – The campus policy states that all employees and students will have a campus email that will be used for all official campus emails. This cannot be updated or deleted through MyCoyote.

  o **Other** – Students can maintain this email address on the system. It can be updated or deleted through MyCoyote.

Service Indicators (Holds)

Navigation – Main Menu → Campus Community → Service Indicators (Student) → Manage Service Indicators

1. Enter Student's Coyote ID (Empl ID) or Last/First Names to find the record

2. Click [Search]

Adding a Service Indicator

You will only be able to add and/or delete the Service Indicator(s) for which you are authorized through your security access.

Service Indicator Icons –

- ⊘ = Negative Service Indicator – particular services will be affected until cleared – such as inability to register

- ★ = Positive Service Indicator – usually informational in nature

- By clicking on one of these icons on screens, other than this one, you will see the negative or positive service indicator information that has been placed on the student.

ⓘ Using the 🔍 lookup icon you assist in determining the appropriate values for the fields indicated on the screen.

1. Click ⊞ or Add Service Indicator

2. **Institution –** SBCMP will default in for you if you have it set up in your User Defaults.

3. **Service Indicator Code –** Enter the code for the Service Indicator to be assigned to the student's record. Remember to use the look if you don't know the code.

4. **Service Indicator Reason Code –** Enter the reason that coincides with the Service Indicator that is being placed on the student's record.

5. **Description –** This is the message the student will see in their MyCoyote Student Center. It automatically populates from a setup table and cannot be updated here. If the information is incorrect, contact the Office of Records, Registration & Evaluations to discuss an appropriate update.

6. **Effect –** Negative or Positive hold

EFFECTIVE PERIOD

7. **Start Term –** Enter the term for which this Service Indicator becomes valid. This field is not required for the hold to be active. Functions that are term based will look at this field first and then to the Start Date field.

8. **End Term –** Some Service Indicators can be valid for one or more terms and then they are no longer applicable. This could be in the case of pre-payment of fees for a particular term. Most Service Indicators will not have an end term and are open until cleared by the student.

9. **Start Date –** This is the date that the Service Indicator becomes valid. Most often, it is the current date, but it can be pre-set to a later date.

10. **End Date –** If the Service Indicator is only valid for a particular length of time, a date can be entered. Most Service Indicators will not have an end date and are open until cleared by the student or when the End Term expires the Service Indicator.

ASSIGNMENT DETAILS – CONTACT INFORMATION – COMMENTS – SERVICES IMPACTED

- Information already displaying in fields defaults in from the setup tables and more details are not necessary.

- If additional information would be helpful, a particular individual should be contacted about this Service Indicator or a Comment is needed, that information can be added.

Remember, this information displays in all offices with Service Indicator access and must reflect professional judgment.
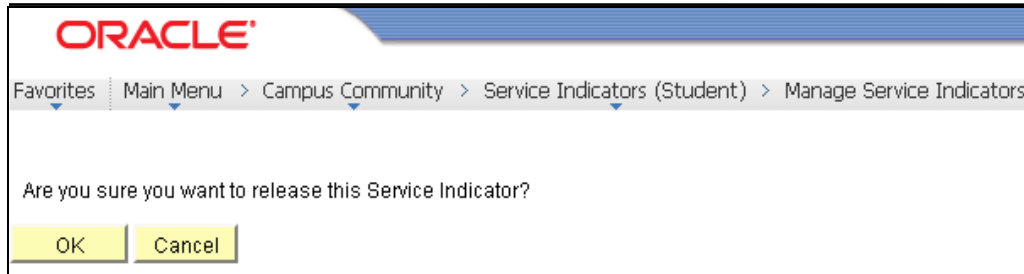
Service Indicator Date Time and User ID and name of the person placing the Service Indicator will display automatically.

11. Click OK

🗒️ **Optional Information above where circled.**

Deleting a Service Indicator

1. Bring up the Manage Service Indicator screen

2. Select the appropriate Service Indicator – Click on the appropriate code hyperlink to view the Service Indicator you will be removing.

Note there are 2 service indicators for this student but for other students there could be more. Pay close attention to the Service Indicator Summary bar. You may need to select "View All" to see additional Service Indicators.
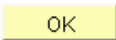
3. Click

4. Click OK
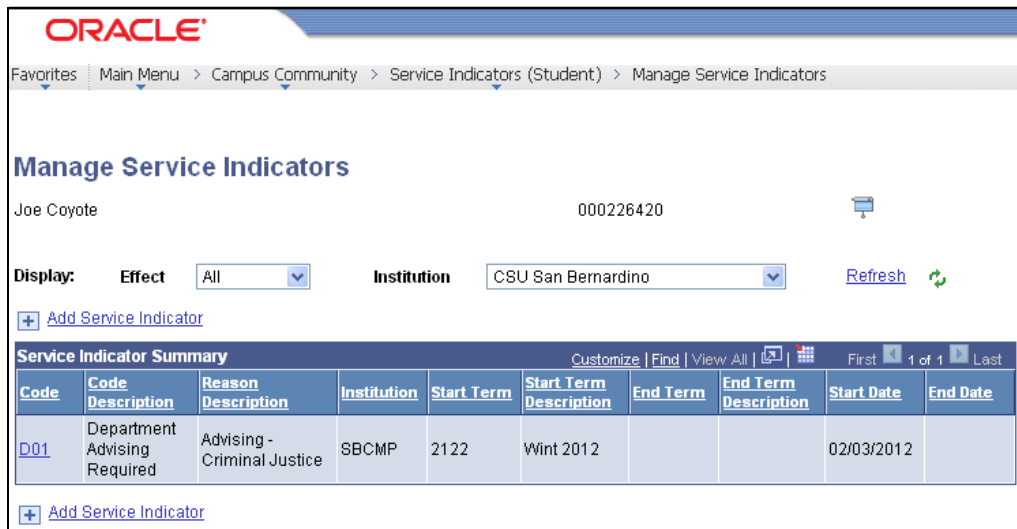
The Service Indicator is now removed.

- A Service Indicator Audit can be run to show the activity of the Service Indicators and who added and deleted them from the system. No comments are saved to the audit.

- If only the ID is used, all Service Indicators will display.

Program Plan Stacks

Navigation – Main Menu → Records and Enrollment → Career and Program Information → Student Program/Plan

1. Enter Student's Coyote ID (ID) or Last/First Names to find the record

2. Click [Search]

3. **Search Results –** A listing of the student's Program/Plan Stacks will display if there is more than one result for the student. If there is only one Program/Plan Stack, you will go directly to the Student Program/Plan page

4. **Click on any hyperlink in the row that has the information you want to view**

📌 **To see all of the history for this particular Program/Plan Stack, click Include History. This will show the student's progress throughout this stack. The most recent information will display first.   As a student changes their major, files a graduation check, etc., a row is added ⊞ for each of those Program Actions. This particular student has only four rows – i.e. 1 of 4 will display. To see previous major activity, use the ▶ to scroll though the pages. You can also select the "View All" option, but the display can be confusing.**

Student Program Page –

- Status – Completed Program (COMP) which means a degree has been issued

- Effective Date – 12/11/2004

- Academic Program – UGRD (Undergraduate)

- Admit Term – 2024 (Spring 2002)

- (GE) Requirement Term – 2008 (Fall 2000)

- Expected Grad Term – 2048 (Fall 2004) This is the term for which a graduation check has been filed and since the Status = Completed Program, that is the term the student was graduated

- Campus – MAIN or PALM to designate campus the student indicated on their application and to which they are enrolled

5. Click on the Student Plan tab

Student Plan Page –

- Academic Plan – **ENTMCBPBAX** – This is the student's major code - All plan codes are 10 characters in length and consist of the 4-digit major code **and** 3-digit college code (Academic Group) **and** the 3-digit degree objective. If the degree objective has only 2 digits (e.g. BA) we add a 3rd character. For undergraduate coding we add "X" – for postbaccalaureate undergraduate degrees, we add "P". Refer to Reference Materials – Career/Program Degree Table.

  - Undergraduate student seeking a BA in Administration – Entrepreneurial Management Concentration = **ENTMCBPBAX**

  - Postbaccalaureate student seeking a BA in Administration – Entrepreneurial Management Concentration = **ENTMCBPBAP**

- Degree – BA

- (Major) Requirement Term – Fall 2001 (2018)

📋 The information between the 2 dark blue bars is information from the Student Program tab. This eliminates having to go back and forth to view this information.

6. Student Sub-Plan Page – We do not use this page. All major coding has been combined at the plan level.

7. **Student Attributes –** If this were a Transitory Student (UTRN or PTRN) also known as a visitor, information pertaining to the visitor classification will be indicated. It is strictly internal information for the Office of Records, Registration & Evaluations in determining how long a student is allowed to attend at a visitor. Their Program/Plan Stacks are then discontinued in accordance with this status.

8. **Click on the Student Degrees tab**

Student Degrees Page –

- Degree Checkout Status – Once a student files a graduation check, this field will be populated.

    o   Applied – graduation check has been filed

    o   In Review – graduation check has been completed

    o   Withdrawn – student has cancelled his graduation check

    o   Pending – the graduation check cannot be processed – most often this is for a missing program plan for a student seeking a master degree

Graduation Term – This will be seen on the Student Program Page. (Note – a DATA row will be added to the Student Program page to add the Expected Grad Term)

o   Awarded – the student has been graduated – at that time more information will display and the Degree Checkout Status will be grayed out.

Enrollment Appointments

Navigation – Main Menu → Records and Enrollment → Term Processing → Appointments → Student Enrollment Appointments

1. Enter Student's Coyote ID (ID) or Last/First Names to find the record

2. **Click** [Search]

3. **Results –** Click on any hyperlink in the line for the term that you would like to view

4. **Start Date –** The 1st day the student may register

5. **Start Time –** The start time of day the student may register

6. **End Date –** The last day of "Priority Registration"

7. **End Time –** The last minute of priority registration

Students may register any time after their assigned time – open enrollment begins the day after priority registration ends.

Class Permissions

Navigation – Main Menu → Records and Enrollment → Term Processing → Class Permissions → Class Permissions

📌 **Permissions may override class enrollment limits, requisites and career. If this is an undergraduate you are permitting into a 600-level course (graduate level only), you must first determine if the student has filed a graduation check for that term and then run a PAWS for the student to verify "all requirements met" or "all requirements met with work in progress". This course cannot be used to fulfill the requirements of an undergraduate degree.**

1. **Class Information –** Enter the Academic Institution, Term, Subject Area and Catalog Number

2. **Click** Search

3. Select the Permission to Add tab/page – The Permission to Drop tab/page will not be used.

📌 **When the Class Permission Number page displays, it will be for the first section offered for this course. To see other sections, use the ▶ to scroll through the sections. This example starts with 1 of 4.**

4. **Defaults –** the following defaults can be set here to apply to the students that you are giving permissions to for this particular class. *If you enter the default information here, it will reset each time you enter the permissions and save the data.* Students may require different overrides and those can be set separately per student.

- **Expiration Date –** Initially, this will display the last day of classes for the quarter. When issuing a permit for a student, you should consider how long you want the permission to be available for use. A "Not Used" status is valid for adding the class until the "Expiration Date" is achieved. This is helpful in trying to control the total number of students in the class. Even though it is currently set for the last day of classes, students will only be able to add until Census Date.

- **Permissions Valid For –** Initially, these 5 fields are checked. These are only to be checked for the conditions that you want the class permission to override.

    o **Closed Class –** Select to allow students to enroll in a class that is full. This type of permission also allows students to enroll in a closed combined section or in a class where all available seats are subject to reserve capacity requirements that they might not meet.

    o **Requisites Not Met –** Select to allow students to enroll in a class for which they do not meet the prerequisites.

- o **Consent Required –** Select to allow students to enroll in a class that requires instructor or department consent to add.

- o **Career Restriction –** Select to allow students to enroll in a class that is outside their career. – i.e. Undergraduates in the term in which they will receive their bachelor degree, can be given permission into a 600-level class. This cannot be used to count toward the undergraduate degree and if the student wants to use if toward a master or credential, they need to complete paperwork requesting that the class be considered postbaccalaureate at the completion of the class. Before this can be issued, it must be verified through a current PAWS audit that all courses will be completed in that term for the bachelor degree. *Most often, needs to be unchecked*.

- o **Permission Time Period –** Select to allow student to enroll in the class during the "enroll with permission time period".

5. Class Permission Data –

- **General Info Tab**

  - o **ID –** Enter the Coyote ID for the student – when you tab out of this field, the name will populate the Name field

  - o **Status –** (defaults in) This will indicate Not Used and will track the current status of this permission for the student

  - o **Permission Use Date –** (defaults in) The date that the status changed by the student registering or dropping class

  - o **Expiration Date –** This is defaulted to end of classes for the quarter – change according to policy established in the department

Assign More Permissions:						
Class Permission Data				Customize | Find | 🔲 📇	First ◀ 1 of 1 ▶ Last	
General Info	**Permission**	**Comments**				
Seq #	**Number**	**ID**	**Name**	**Status**	**Permission Use Date**	**Expiration Date**
1		000226420 🔍	Coyote,Joe E	Not Used		06/11/2012 📅 ➕ ➖

- **Permission Tab**

  - o If defaults were set as discussed earlier, the check boxes will mark accordingly

  - o If you choose to set them per student or want it different from the defaults, uncheck those areas that are not wanted

| Assign More Permissions: [ ] Generate |

Class Permission Data   Customize | Find | 🗗 🖩   First ◀ 1 of 1 ▶ Last

| | General Info | Permission | Comments | |

Seq #	Number	ID	Closed Class	Requisites Not Met	Consent Required	Career Restriction	Permission Time Period		
1		000226420 🔍	☑	☑	☑	☐	☑	＋	－

- **Comments Tab**

    o   A notation can be made in this field if desired

 The icon [icon] can be used to stretch these three tabs into one for ease in data entry and viewing

6. Click [+] to add another student or [−] to delete a permission given in error.

 The information regarding placing and removing of permissions as well as the operator who performed the function is captured behind the scenes and as necessary, can be retrieved.
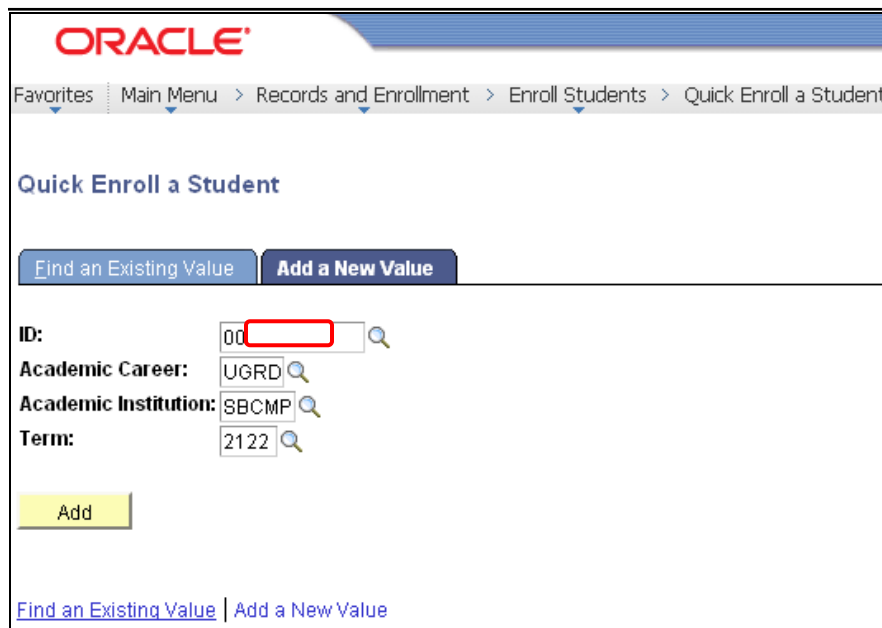
Quick Enroll – Add, Drop, Swap

Navigation – Main Menu → Records and Enrollment → Enroll Students → Quick Enroll a Student

Add a New Value Tab

1. **ID –** Student's Coyote ID

2. **Academic Career** – UGRD or PBAC – using the lookup 🔍 will only allow for the careers that the student can be associated with

3. **Academic Institution** – SBCMP – this will default in if you have set your User Defaults per previous instructions

4. **Term –** the quarter for which you will be performing the enrollment actions

5. **Click** `Add`

ORACLE

Favorites | Main Menu > Records and Enrollment > Enroll Students > Quick Enroll a Student

Quick Enroll a Student

| Find an Existing Value | **Add a New Value** |

ID: 00
Academic Career: UGRD
Academic Institution: SBCMP
Term: 2122

Add

Find an Existing Value | Add a New Value
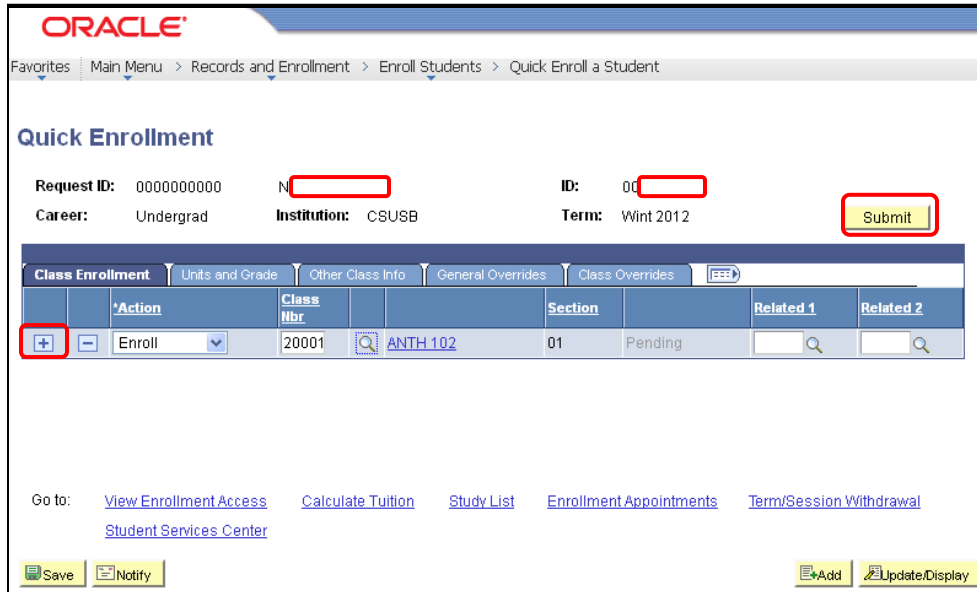
Adding a Class

1. **Action** – defaults to **Enroll –** this is the action value you need for adding a class.

2. **Class Number** – this is the number that is associated with a particular class section. It is not the course number. If you do not know the class number, you can perform a search 🔍 to locate the appropriate class number.

   Note: Labs, activities, etc. that are required with specific courses are considered related courses. If related courses are required, you will need to select the related courses in Related 1 and/or Related 2.

3. Click on the ⊞ symbol to add additional course requests at the same time.

4. Click the Submit button


📌 **Note:** Once you have submitted a request, you should only then make necessary corrections to take care of any errors that occur on the requests. **You should never add additional courses once a request has been successfully submitted.** To add additional courses after submission, you need to click on the Add button at the bottom of the page to open another enrollment request.

5. Review the status area for a **Success** message. If you see any other messages such as **Errors**, you will need to review the error (the actual word 'errors' is a hyperlink which you can click for the error message) in order to make corrections before submitting again.

Enrollment Message Log

6. If you have the access to fix the error, you can then click the [Submit] button to see if it is now a "**Success**"

🔖 **Note:** The 'Quick Enroll' page contains many other advanced features in addition to enrollment functionality described here. Notice the tabs near the middle of the screen. Each tab houses a separate page with its own flags and fields with which to enter information and set flags. These are for functions that are mainly performed in the Office of Records, Registration & Evaluations with appropriate documentation and signatures.

Dropping a Class

Refer to "Add a New Value tab" on page 33 to start a new enrollment action

1. **Action** – Change the default action of Enroll to "**Drop**"

2. **Class Number** this is the number that is associated with a particular class section. It is not the course number. If you do not know the class number, you can perform a search 🔍 to locate the appropriate class number.

3. When searching 🔍 you will only see the classes in which the student is currently enrolled. Select the class to be dropped by clicking on the appropriate check box ☑ to carry the class number to the request screen.

4. Click on the ⊞ symbol to drop additional courses on the same request.

5. Click [Submit]

📌**Note:** Once you have submitted a request, you should only then make necessary corrections to take care of any errors that occur on the requests. **You should never drop additional courses once a request has been successfully submitted.** To drop additional courses after submission, you need to click on the [⊞ Add] button at the bottom of the page to open another enrollment request.
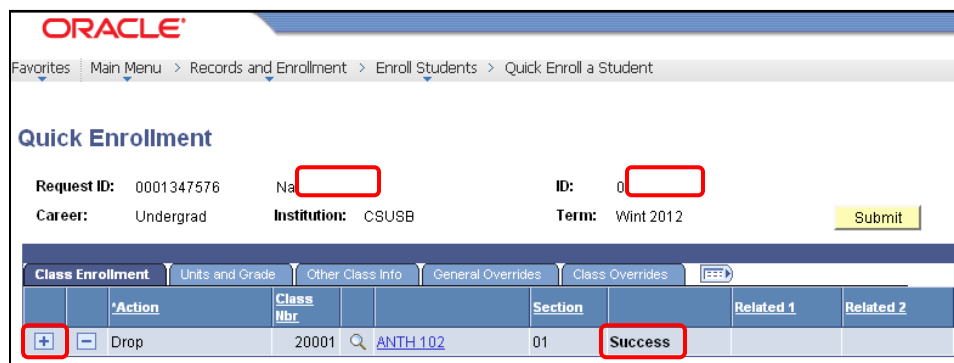

7. Review the status area for a **Success** message. If you see any other messages such as **Errors**, you will need to review the error (the actual word 'errors' is a hyperlink which you can click for the error message) in order to make corrections before submitting again.

Swapping a Class
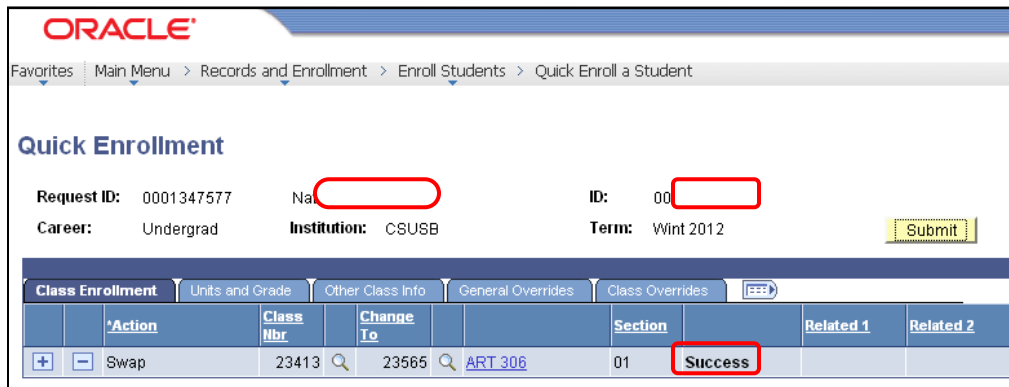
Refer to "Add a New Value tab" on page 33 to start a new enrollment action

1. Action – Change the default action of Enroll to "**Swap**"

2. Class Number – this is the number that is associated with a particular class section. It is not the course number. If you do not know the class number, you can perform a search 🔍 to locate the appropriate class number.

3. When searching 🔍 you will only see the classes in which the student is currently enrolled. Select the class to be swapped by clicking on the appropriate check box ☑ to carry the class number to the request screen.

4. Change To – enter the class number or click search 🔍 for the course to which you are swapping.

5. Click ⊞ symbol to swap additional courses on the same request.
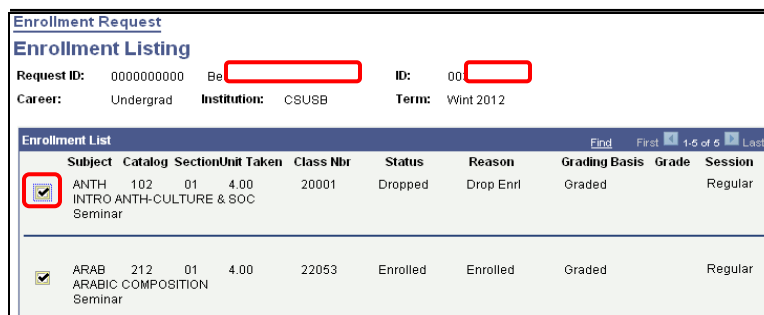
6. Click [Submit]

7. 📌 **Note:** Once you have submitted a request, you should only then make necessary corrections to take care of any errors that occur on the requests. **You should never swap additional courses once a request has been successfully submitted.** To swap additional courses after submission, you need to click on the [E+Add] button at the bottom of the page to open another enrollment request.

8. Review the status area for **Success** message. If you see any other messages such as **Errors**, you will need to review the error (the actual word 'errors' is a hyperlink which you can click on for the error message) in order to make corrections.
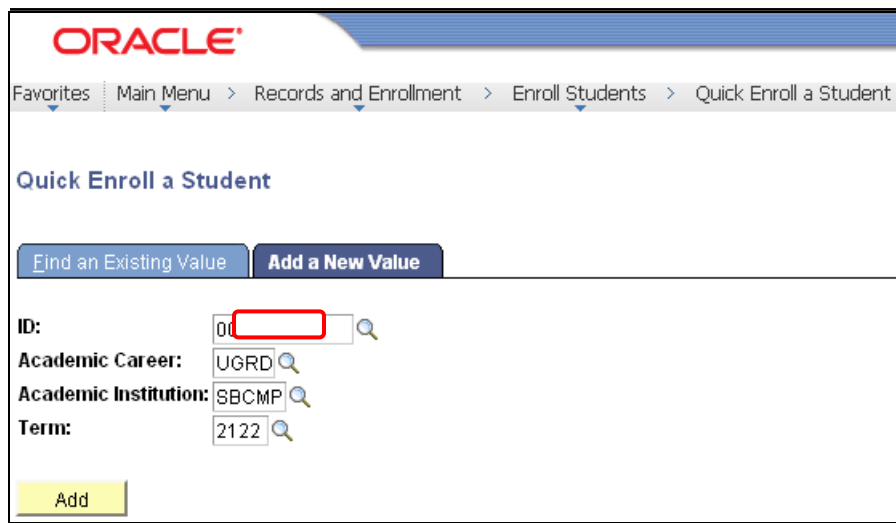
Student Schedule

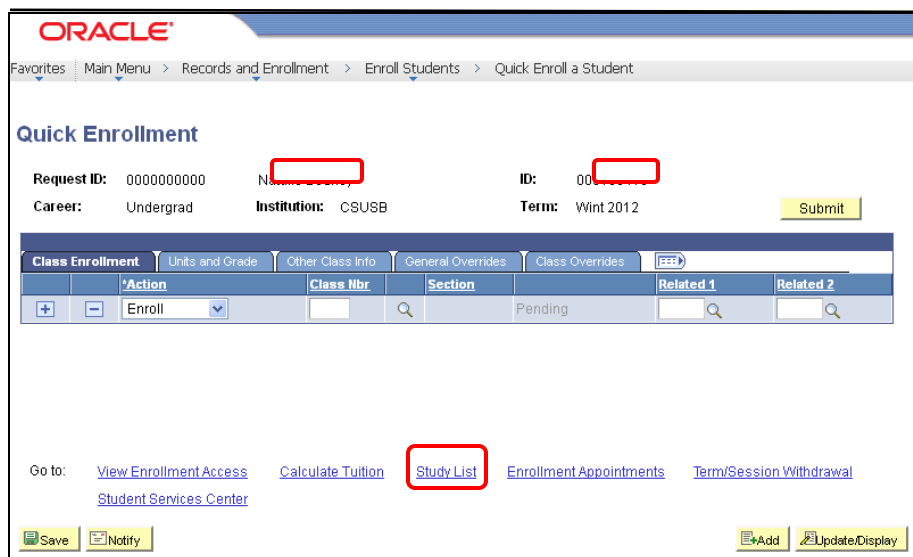**Navigation – Main Menu → Records and Enrollment → Enroll Students → Quick Enroll a Student**

1. **Add a New Value (always use this tab) –** All of the four fields must have data for the search to process

2. **Click**

3. **Click on <u>Study List</u> hyperlink**

4. **Class Schedule Filter Options –** When the screen displays, the 3 fields will be checked. Currently, we are not using waitlisting so there is no affect if this box is checked. Uncheck the Show Dropped Classes to display Enrolled Classes only.

5. **Printer Friendly Page –** Select this hyperlink to see schedule in a cleaner format without the class hyperlinks and calendar link.

Another way to view the student schedule if you don't have access to this screen –

Navigation – Main Menu →Records and Enrollment → Enrollment Summaries → Enrollment Summary

6. This version does not provide as much information – missing information includes classroom, dates, times, dropped classes and instructor as well as the links

This screen will only display 3 classes. I selected view all to see all 4 classes.

7. For a more complete report, select Print Study List

8. Once it show saved, select Report Manager

9. Click Refresh until you see the Details link for the Individual Student Study Rpt row

10. Click Details link

11. Select the PDF link

12. Results

```
Report ID:  SRSTDNT2                        STUDY LIST                          Page No.  1
                                                                                Run Date 02/1
                                                                                Run Time 16:5
        Name:      Be                                    Career:   Undergraduate
        ID:        0(                                    Program:  Undergraduate
        Term:      Winter 2012

                                                              Units:     Grading:
    Class No.    Subject      Catalog    Session:   Section    Status    Taken      Basis

    22053        ARAB         212        1          01        Enrolled      4.00    Graded
                 ARABIC COMPOSITION                 Seminar
                 University Hall         058             S      9:0000 - 12:5000   Ramadan,Ayman

    23748        ARAB         470        1          70        Enrolled      4.00    Graded
                 CONTEMP ISSUES ARAB CULTURE        Seminar
                 TBA                     TBA            TBA    TBA                  Doueiri,Dany

    23565        ART          306        1          01        Enrolled      4.00    Graded
                 GREEK & ROMAN ART                  Seminar
                 John M. Pfau Library    245            TTh     2:0000 -  3:5000   Ciofalo,John J

    23783        COMM         344        1          02        Enrolled      4.00    Graded
                 PR COMM                            Seminar
                 University Hall         262            MW      4:0000 -  5:5000   Pate,John R
```

Transcript Request

Navigation – Main Menu → Records & Enrollment → Transcripts → Transcript Request

This is not a batch job, but an individual transcript request can be used to process multiple students' transcripts at one time.

1. Select "Add a New Value" tab

Transcript Request Header

1. Institution* – SBCMP – this value will default.

2. Transcript Type* – UNOFF (unofficial – for department use)

3. Output Destination* – Printer

*These values will default into the page if you set your User Defaults as described previously in this document.

4. Select the Request Detail page
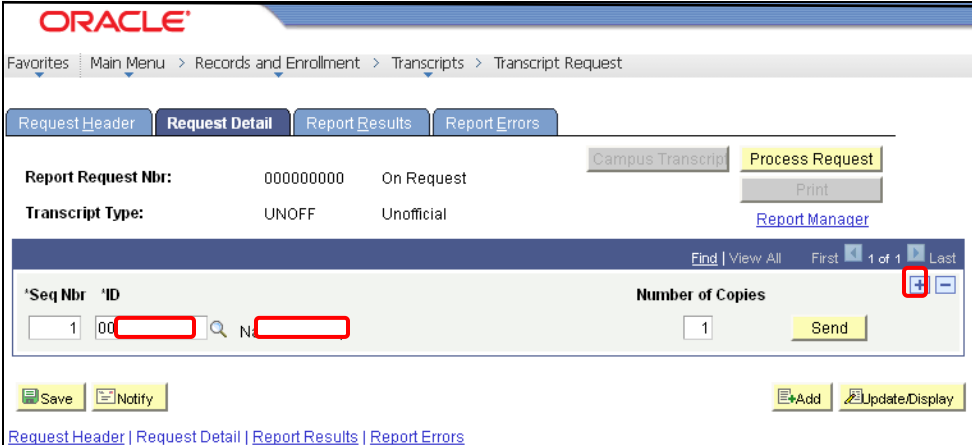
Transcript Request Detail

1. ID – The ID (Coyote ID) of the student for whom the report is to be run. To include more that one student's transcript on this request, select ⊞ so another line is available for entry of another ID.

ⓘ **When you tab out of the ID field, the student's name defaults onto the page.**

SINGLE REQUEST

MULTIPLE REQUESTS
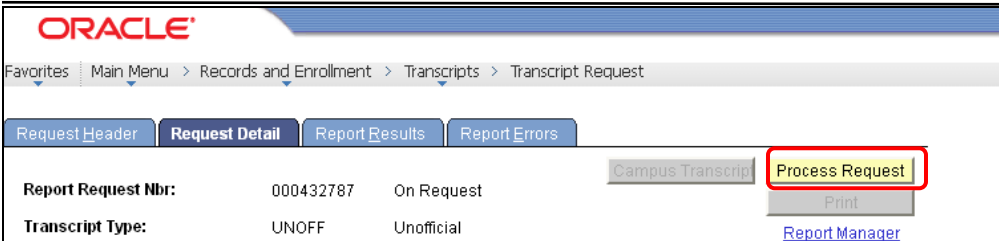
2. As of Date – This defaults to the current date. Leave it with the defaulted date.

3. Process Request – Select `Process Request` when you are ready to submit the request for processing. A COBOL/SQL process commences and, when complete, the system automatically displays the results on the Report Results page.

Transcript Report Results

1. Results – A single column display of the transcripts appears.

ℹ️ **Note – this is 1 of 3 results as there were 3 student ID's for this request. Use the arrows to scroll to the next (previous) record.**

📌 **VERY IMPORTANT – When you select the print options on the "Report Results" page, it will only print the transcript that is currently displayed. If you want to print all of the transcripts requested at one time, you need to return to the "Request Detail" page to print.**

2. **Campus Transcript –** CMS Central has given the campuses the ability to format the transcript by modifying the code beyond what can be setup when you define the transcript types. To print this format, select Campus Transcript .

ⓘ **The message will say "Saved" when it is through processing.**

3. **Report Manager –** Click Report Manager to view the reports that have been submitted.

If the report you are requesting is not in the "Posted" status, click the Refresh button. You may have to do this more than one time, so give it some time between refreshing.

4. **Details –** Select the Details link.

5. Report Detail – Under File List, select the PDF file link

6. The transcripts will display

```
                                           Unofficial Undergraduate Transcript                    Page 1 of 1

    Name       :  Joe Coyote
    Student ID:  000226420
    Birthdate :  1991-01-01


    Federal and State Laws state that this student's record must be used only for
    the intended purpose and that release or disclosure to unauthorized other
    parties without the prior written consent of the student (or former student )


    Print Date   :  2012-02-13                          Withdrew  :  2010-10-14
                                                                  - - - - -  End of Transcript  - - - - -
                        - - - - -   Academic Program History   - - - - -


    Program    :  Undergraduate

    2008-03-01  :  Active in Program

                  2008-03-01 : Admin - Accounting Conc Major

    2011-02-24  :  Active in Program

                  2011-02-24 : Admin - Finance Conc Major

                        - - - - -   Transfer Credits   - - - - -

    Transfer Credit from RIVERSIDE CITY COLLEGE

    Applied Toward Undergraduate Program          Attempted  Earned     Grade Pt

      Course Trans GPA:    4.000  Transfer Totals :    36.00    36.00      144.000
```
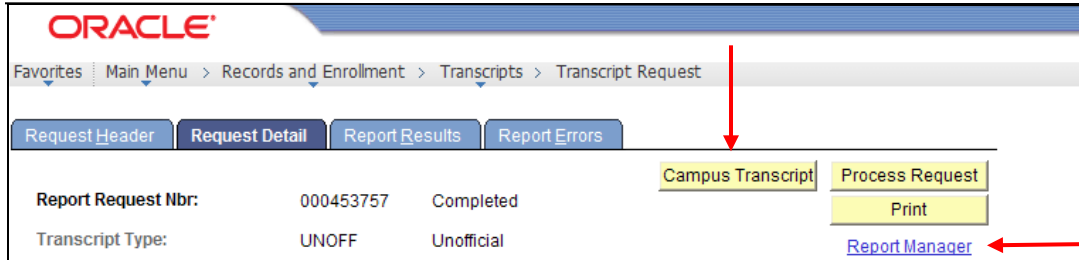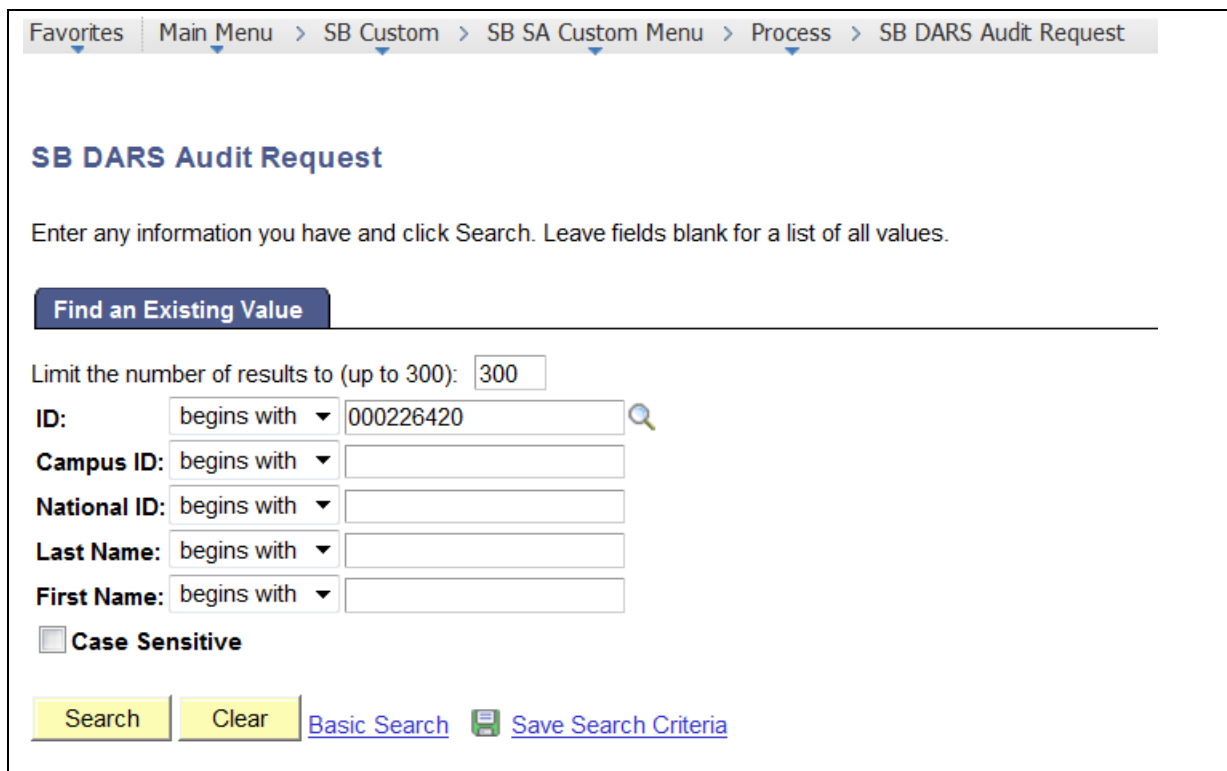
Degree Audit – PAWS

The degree audit or PAWS (Program Advising Worksheet for Students) is an automated credit summary, for undergraduate degrees, that provides students with a listing of all coursework required for graduation from CSUSB. It allows students to map out their course selection at any point in their academic career by comparing the classes they have taken or are now taking, to those they will need to take in order to complete their undergraduate degree program. Students will receive an email notification, sent to their **CSUSB Email**, once their PAWS is ready for review. Once notified, students will need to login to MyCoyote to request and print a copy of their PAWS report.

Navigation – Main Menu → SB Custom → SB SA Custom Menu → Process → SB DARS Audit Request

- Enter ID or Last and First Name

- Click [Search]

Favorites | Main Menu > SB Custom > SB SA Custom Menu > Process > SB DARS Audit Request

SB DARS Audit Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300): 300
ID: begins with ▼ 000226420 🔍
Campus ID: begins with ▼
National ID: begins with ▼
Last Name: begins with ▼
First Name: begins with ▼
☐ Case Sensitive

[Search] [Clear] Basic Search 💾 Save Search Criteria

- If the student is an active undergraduate, a major and catalog year will display

- Click [Submit Request] to run an audit (PAWS) for the student's current major

- Click [OK] in response to pop-up question. This will automatically transition you to the View PAWS tab.

- Periodically click [Refresh] until a View Web link appears

- Click View Web

Click Expand All to view all requirements.

- Use the scroll bar on the right hand side of the page to navigate audit pages

What If Audit Request

- Navigation – Main Menu -> SB Custom -> SB SA Custom Menu -> Process -> SB DARS Audit Request

- Enter ID or Last and First Name

- Click [Search]

- **Click** ☑ **"What If" Flag**, click 🔍 to look up and select appropriate major.

- **Click** [Submit Request]

- Click OK in response to pop-up question. This will automatically transition you to the View PAWS tab.

- Periodically click Refresh until a View Web link appears

- **Click** View Web

- **Click** <u>Expand All</u> to view all requirements

- Use the scroll bar on the right hand side of the page to navigate audit pages

Reference Materials

Term Translation

The first number is the millennium

1900 = 1;   **2**000 = 2

The second and third numbers are the years within the century

19**99** = 99;   20**05** = 05;   20**15** = 15

The fourth number is the term

Winter = 2;   Spring = 4;   Summer = 6;   Fall = 8

Fall 1999 = 1998   Winter 2006 = 2062

College Codes (Academic Groups)

CAL – College of Arts and Letters

CBP – College of Business and Public Administration

CED – College of Education

CNS – College of Natural Sciences

CSB – College of Social and Behavioral Sciences

CUV – College of University Studies

CEL – College of Extended Learning

FERPA ICON

When you see this icon on a page, the student has requested that certain information in their student records be further restricted. The students can update this through My Coyote Student Center. By clicking on this icon, you will see the information the student is allowing as releasable through the Records Office only. This information is seldom released.

PeopleSoft 9.0 Quick Navigation

Academic Standing

Main Menu > Records and Enrollment > Student term Information > Term History

Audit Service Indicators

Main Menu > Campus Community > Service Indicators (Student) > Audit Service Indicators

Campus Community

Main Menu > Campus Community > Personal Information (Student) > Add/Update a Person

Class Permissions

Main Menu > Records and Enrollment > Term Processing > Class Permissions > Class Permissions

Course Credits- Manual

Main Menu > Records and Enrollment > Transfer Credit Evaluation > Course Credits- Manual

Enrollment Page

Main Menu > Records and Enrollment > Enroll Students > Enrollment

Enrollment Request Search

Main Menu > Records and Enrollment > Enroll Students > Enrollment Request Search

Enrollment Summary

Main Menu > Records and Enrollment > Enrollment Summaries > Enrollment Summary

Milestones

Main Menu > Records and Enrollment > Enroll Students > Student Milestones

PAWS Request

Main Menu > SB Custom > SB SA Custom Menu > Process > SB DARS Audit Request

Query Viewer

Main Menu > Reporting tools > Query > Query Viewer

Quick Enroll a Student

Main Menu > Records and Enrollment > Enroll Students > Quick Enroll a Student

Service Indicators

Main Menu > Campus Community > Service Indicators (Student) > Manage Service Indicators

Student Enrollment Appointment

Main Menu > Records and Enrollment > Term Processing > Appointments > Student Enrollment Appointment

Student Grades

Main Menu > Records and Enrollment > Student Term Information > Student Grades

Student Groups

Main Menu > Records and Enrollment > Career and Program Information > Student groups

Student Program Plans

Main Menu > Records and Enrolment > Career and Program Information > Student Program/ Plan

Student Repeat/ Withdrawal Inquiry

Main Menu > CSU SA Baseline > CSU Student Records > EO1037 > Use > Student Inquiry

Student Services Center

Main Menu > Campus Community > Student Services Center

Student Standing Code

Main Menu > CSU SA Baseline > CSU Systemwide Reporting > Enrollment Reporting System > ERS Student > Student Reporting Data

Term History

Main Menu > Records ad Enrollment > Student Term Information > Term History

Test Credit- Automated

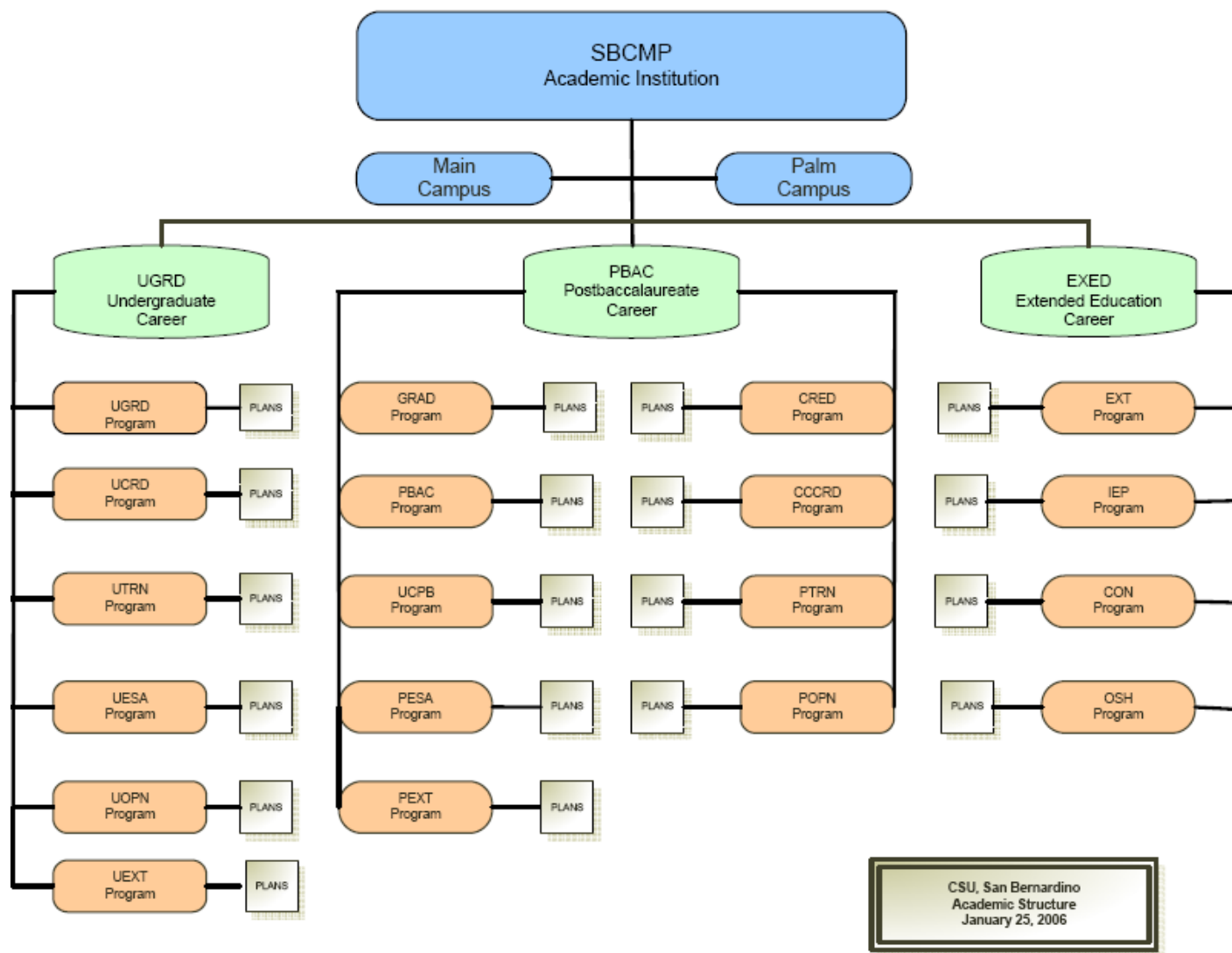Main Menu > Records and Enrollment > Transfer Credit Evaluation > Test Credits- Automated

Transcript Request

Main Menu > records and Enrollment > Transcripts > Transcript Request

Career/Program/Degree Table

CAREER	PROGRAM	SIS+ DEGREE	PS DEGREE	DEFINITION
UGRD				
	UGRD	BA	BAX	Bachelor of Arts
		BS	BSX	Bachelor of Science
		BVED	BVE	Bachelor of Vocational Education
		MIN	MIN	Minor
		NDPR	PRF	Preprofessional Program
		NDUG	NON	Undeclared
		CERT	CRT	Certificates
	UCRD	UCRD	UCR	Undergraduate Credentials
	UTRN	UTRN	NON	Undergraduate Transitory - Including Summer Visitors
			BAX	Undergraduate International Visitor needing I-20
		UCRD	NON	Voc Ed 300 Credential Visitors
	UOPN	NDUG	NON	Open University
	UEXT	NDUG	NON	CEL Offered Degree Applicable or Special Session Courses
	UESA		BAX	Undergraduate Early Summer Admit & NSE Incoming
PBAC				
	GRAD	MA	MAX	Master of Arts
		MS	MSX	Master of Science
		MBA	MBA	Master of Business Administration
		MPA	MPA	Master of Public Administration
		MAT	MAT	Master of Arts in Teaching
		MPH	MPH	Master of Public Health
		MSW	MSW	Master of Social Work
		MUP	MUP	Master of Urban Planning
		EDD	EDD	Doctor of Education
	PBAC	BA	BAP	Bachelor of Arts
		BS	BSP	Bachelor of Science
		BVED	BVP	Bachelor of Vocational Education
		MIN	MNP	Minor
		NDPR	PRP	Preprofessional Program
		CERT	CTP	Certificates
	CRED	CRED	CRD	Credentials
	CCCRD	CRED	CCR	Conditionally Classified Credentials
	UCPB	NDGD	NON	Unclassified Postbaccalaureate
	PTRN	PTRN	NON	Postbaccalaureate Transitory - Including Summer Visitors
			MAX	Postbaccalaureate International Visitor needing I-20
		UCRD	NON	Voc Ed 300 Credential Visitors
	POPN	NDGD	NON	Open University
	PEXT	NDGD	NON	CEL Offered Degree Applicable or Special Session Courses
		MA	MAX	Master of Arts
		MS	MSX	Master of Science
		MBA	MBS	Master of Business Administration
		MPA	MPA	Master of Public Administration
	PESA		MAX	Master's Early Summer Admit & NSE Incoming
			BAP	2nd BA Early Summer Admit
			CRD	Credential Early Summer Admit
EXED				
	EXT			Extension Programs
	IEP			International Extension Program
	CON			Conference Services
	OSH			Osher Life Long Learning Institute at Palm Desert Campus

CSU, San Bernardino
Academic Structure
January 25, 2006

CSU, San Bernardino
Course Structure
October 11, 2005