

CS Core - Data Validation - Enrollment, Transfer Credit & Transcript Text

i Purpose: This document is to provide colleges instructions on how to perform the validation of data in the PeopleSoft environment.

Colleges are being asked to review data that was converted from the legacy environment to PeopleSoft. The goal of data validation is to ensure legacy data was accurately converted into PeopleSoft. College Subject Matter Experts (SMEs) are included in data validation as a learning experience in navigating the PeopleSoft application, selecting records to review, and reporting issues discovered.

College executives are asked to support the time and effort expended by college SMEs necessary to complete the following:

- Develop a familiarity with navigating the relevant PeopleSoft menus and pages.
- Review selected records, comparing legacy data to the records as converted into PeopleSoft.
- Report issues discovered after careful review of converted data.
- Monitor resolution of reported issues for review in the next conversion testing round.
- Develop an approach for self-managing the data validation and issue reporting process in subsequent rounds of data conversion testing.

It is expected that College Data Validation SMEs will have already read the Data Validation Overview guides *before* beginning their validation activities:

- [Data Validation Overview - Getting Started](#)
- [Data Validation Overview - Reporting Issues](#)

Overview of Data Validation

Conversion Summary

This round of conversion validation includes the following areas:

- Enrollment & Grades
- Transfer Credit (Validate 10% of records; confirm that transformed courses converted as expected)
- Transcript Classes (Validate 10% of records; confirm that transformed courses converted as expected)

- Transcript Text
 - Transcript Notes
 - Quarterly Honors & Awards
 - Degree Honors

Conversion Validation Due Date

The Validation Results and Feedback are due NO LATER THAN on the last day of the Data Validation Period. It is strongly recommended that issues are reported EARLY in the validation period and are not held until the end of the period. Validation Results and Feedback are for reporting closure of the college's validation activities for the conversion cycle. To view a list of the validation periods please refer to the [timeline topic in the Data Validation Overview - Getting Started Guide](#).

Getting Help

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Conversion Detail – Enrollment & Grades

Conversion Background

Students who have enrolled at your institution within the last six years will be converted to PeopleSoft. These students' full history of classes, grades, and current enrollment is converted. Data for this conversion is extracted from the legacy STU-CLASS-D and TRAN-CLASS-D records. Transcript class (SM6013) conversion is covered in the Transfer Credit & Transcript Class section of this document. Please refer to that section for transcript class info.

During validation it's important to note that colleges are given the option to exclude certain enrollments from conversion or a course may be transformed to another Department/Division in PeopleSoft. Enrollments may also be excluded through the exclude subject file, exclude class file, or the exclude/transform Department/Division file.

During the conversion process, enrollments are assigned to the Undergraduate Academic Career (UGRD) unless the class MISC-2 field has a value of CE, which converted to the Continuing Education Career (CNED). Waitlist enrollments are converted for any term (YRQ) equal to or greater than the designated go-live term.

Students' grades are converted to PeopleSoft based on a data crosswalk populated by your college. Legacy grade qualifiers are not converted to PeopleSoft. Instead, special qualifiers are captured in PeopleSoft Grade Basis. Data crosswalks are used to map Legacy grades (including those with special qualifiers) to the necessary PeopleSoft Grade Basis and Grade. The PeopleSoft Grade Basis denotes special grading rules including grade forgiveness, suppressed grades and repeated courses (for historical enrollments).

Common Conversion Issues

Enrollment conversion is impacted by upstream conversion issues, including Course Catalog and Bio/Demo. Enrollment-specific conditions identified for this round of conversion include:

- **Continuing Education Grade Review**
 - Some enrollments for Continuing Education courses failed to convert because the grade awarded is not present in the college PeopleSoft Grade Scheme Table.
 - Review file to determine if courses are CNED
 - Decide if grades should be converted or if you will cleanup the student grades in legacy
- **Duplicate Enrollment Error**
 - This error occurs when a student is enrolled in a class on screen SM7001 and also receives credit for the same item number as a transcribed class on SM6013.
 - Determine which record is a duplicate and where credit should be awarded (SM7001 or SM6013).
 - Award credit on the appropriate record and remove the duplicate record

Minimum Validation Requirements

Your validation process should confirm that a student's full history of enrollment and graded classes were converted to PeopleSoft.

- Review converted enrollments for terms prior to the go-live term
- Review both Academic and Continuing Education enrollments
- Waitlists may not be available for validation depending on the legacy snapshot date.
- Confirm that grades with special qualifiers converted to the crosswalked Grading Basis.
- Confirm that enrollments did not convert for subjects that were excluded.
- Confirm that courses transformed to a new PeopleSoft Subject and Catalog number converted as expected.

Validation Steps - Enrollment

The information included in this section provides validation guidance for the enrollment conversion. SMEs are recommended to use a combination of validation methods to review this information, including running queries, viewing pages in PeopleSoft, and generating a PeopleSoft transcript. Please validate using the steps below.

Step 1 - Identify Students to Validate

Run the queries listed below as the first step in validation. These will help you identify students with a variety of enrollment scenarios. You can then use the student ID's and associated terms to view their records in the PeopleSoft pages. The class and grade data in the query results can also be used to compare with legacy data. The data in the query results is pulled from the pages in PeopleSoft where converted enrollments were input.

Queries:

1. **CTC_VAL_STDNT_ENROLL_BY_COURSE**
 - Converted enrollments with status of enrolled or withdrawn (no waitlist)
2. **CTC_VAL_STDNT_WAITLIST**
 - Waitlisted students
3. **CTC_VAL_STDNT_ENROLL_CONT_ED**
 - Continuing Education enrollments by term
4. **CTC_VAL_STDNT_ENROLL_RECORD**
 - A list of all enrollments, withdrawals and waitlisted classes for a student, for all terms, with grades.
5. **CTC_VAL_STDNT_ENROLL_GRADES**
 - Converted enrollments by Grading Basis
 - **TIP:** All values for Grading Basis will be available to select in the dropdown box, including values your college does not use.
6. **CTC_VAL_STDNT_TERM_HISTORY**

***Please note:** these queries do not include transcript classes. Please refer to the *Transfer Credit and Transcript Classes* section of this document for validation queries and instructions.

Navigate to the Query Viewer page:

- **Query Viewer:** Navigator > Reporting Tools > Query > Query Viewer
 - Steps to Search for a Query
 1. Enter the query name
 2. Click Search
 3. Select the "HTML" hyperlink to run the query in your browser. You can download the results directly from this page.

4. Enter your Institution code
5. Enter a term, ID (ctcLink), Legacy SID or any other prompt values
6. Click View Results
 - **TIP:** Enter a value into more than one prompt or there may be too many results to display.
 - **TIP:** If you receive a message that there are too many results, you can use any results returned to validate.

Step 2 - Review Enrollments and Grades in PeopleSoft

After you have identified students to validate, navigate to the following pages to review enrollment and grade information. Compare the PeopleSoft and legacy student records.

Enrollment Page

The Student Enrollment 1 tab (pictured below), displays full class and grade information a student is enrolled in for each term.

Navigation: Navigator > Records and Enrollment > Enroll Students > Enrollment

- Steps to Search for a Student
 - Enter the student's ID
 - Enter your Institution code
 - Click Search
 - **TIP:** All terms and careers for the student will display. Click a specific term to review.

What to Validate:

TIP: Use the [>] or click "View All" to review each enrolled class that was converted

1. Student Career
2. Subject & Catalog Number
3. Status: displays whether the student is enrolled or waitlisted
4. Grading: displays the student's official grade and grading basis
5. Repeat Code: A Repeat code of REXP was added to all converted enrollments to exclude it from the Repeat Checking process

Example of the Enrollment page, Student Enrollment 1 tab

Student Enrollment 1 | Student Enrollment 2 | Student Enrollment 3 | Student Enrollment 4 | Last Enrollment Action

Term: 2014 FALL Career: Academic Career ← Student Career Institution: [Redacted]

Class Details Find | View All First 1 of 3 Last

*Class Nbr: 4889 Description: Pronun/Conversation I Component: Lecture
 Subject: EAP Catalog Nbr: 89 Class Section: 1
 Academic Group: Transitional Studies Career: Academic ← Career assigned to class
 Status: Enrolled Reason: Enrolled Session: Regular Status Date: 08/21/2015
 Action: [Dropdown] Reason: CONV Conversion

Grading Override Grading Basis

*Grading Basis: GRD Grade: [Redacted]
 Grade In/Official: D D Minimum
 Repeat Code: REXP REXP

Units

Units Taken	3.00	Units Earned	3.00
Course Count	1.00	Progress	3.00
Billing Units	3.00	FA Progress	3.00

Example of a Waitlisted student

Student Enrollment 1 | Student Enrollment 2 | Student Enrollment 3 | Student Enrollment 4 | Last Enrollment Action

Term: 2018 SPRNG Career: Academic Career Institution: [Redacted]

Class Details Find | View All First 1 of 1 Last

*Class Nbr: 3825 Description: Payroll & Business Taxes Component: Lecture
 Subject: ACCT Catalog Nbr: 145 Class Section: 1
 Academic Group: Health, Bus/Prof Services Career: Academic Session: Regular
 Status: Waiting Reason: Section is Full Status Date: 02/18/2018
 Action: [Dropdown] Reason: CONV Conversion

Grading Override Grading Basis

*Grading Basis: GRD Graded
 Grade In/Official: [Redacted]
 Repeat Code: [Redacted]

Units

Units Taken	5.00	Units Earned	5.00
Course Count	1.00	Progress	5.00
Billing Units	5.00	FA Progress	5.00

Enrollment Summary Page

The Enrollment Summary page provides a condensed list of a student's enrollment and statistics for a term (pictured below).

- **Navigation:** Main Menu | Records and Enrollment | Enrollment Summaries | Enrollment
 - Steps to Search for a Student
 1. Enter the student's ID
 2. Enter your Institution code
 3. Click Search
 4. **TIP:** All terms and careers for the student will display. Click a specific term to review.
- **What to Validate:**

- **TIP:** The summary shows three classes at a time. Click the “View All” link for the full list.
- **TIP:** Additional class data is available by clicking the Lookup glass.
- On the Enrollment Summary tab, review the student’s enrolled or waitlisted classes for the term
- On the Term Statistics tab, review the total Units and GPA for the term

Example of the Enrollment Summary

Enrollment Summary | Term Statistics

J. Fontanil 2012 ★

Term: 2015 WINTR Career: Academic Print Study List Report Manager

Class Nbr	Subject	Catalog	Session	Section	Status	Status/Reason	Acad Prog	Grading Basis	Units Taken
5575	CU	105	Regular	2	Enrolled	Enrolled	ACADM	Graded	5.00
	Word I		Lecture						
5189	HUM&	117	Regular	1	Enrolled	Enrolled	ACADM	Graded	5.00
	Humanities li	[Ccn]	Lecture						
4659	PE	100	Regular	4	Enrolled	Enrolled	ACADM	Graded	2.00
	Total Fitness		Lecture						

Term History

This page is used to review term and cumulative statistics, including GPA, enrolled units, and transfer units. This page displays unit and GPA values for all institutions, terms and careers a student is active in. Make sure to use the [>] to identify your institution and the correct career/term combination.

- **Navigation:** Navigator > Records and Enrollment > Student Term Information > Term History
 - Steps to Search for a Student
 1. Enter the student’s ID
 2. Click Search
 3. **Tip:** This page is first sorted into Academic Career: use the arrows to navigate from Continuing Education to Academic. Use the next set of arrows to confirm the Institution and Term you are validating.
 4. Use the Term and Cumulative Statistics tabs to validate GPA with legacy records

Example of Term History

Term Statistics | Cumulative Statistics | Term Withdrawal | Session Withdrawal | Academic Standing | Student Grade Review

A. Jones 2010

Academic Career: Academic Career

Institution: Spokane CC
Term 2097 FALL 2009

Academic Level - Term Start: Freshman

Enrollments

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load	12.000
For GPA	10.000	0.000	0.000	0.000	0.000	Units Earned Towards Acad Load	0.000
Not For GPA	2.000			0.000	0.000	Units Taken For Audit	0.000

Transfer Credit

	Graded Units	Grade Points	GPA	Earned Units	Graded Transfer Units GPA / No GPA	0.000
For GPA	0.000	0.000	0.000	0.000	For Units Only	0.000
Not For GPA	0.000			0.000	Units Adjustment	0.000
					>>> Total Adjusted Transferred Units	0.000

Combined (Enrollment + Transfer Credit Units)

	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Combined Earned Units GPA / No GPA	0.000
For GPA	10.000	0.000	0.000	0.000	0.000	Transfer Credit For Units Only	0.000
Not For GPA	2.000			0.000	0.000	Transfer Credit Units Adjustment	0.000
						>>> Total Term Units	0.000

Step 3 - Compare the Legacy and PeopleSoft Transcripts

Generate a PeopleSoft transcript for the student and compare the classes displayed to those on the legacy transcript.

- **Navigation:** Navigator > Records and Enrollment > Student Term Information > Term History
 - Steps to Generate a Transcript: <http://ctclinkreferencecenter.ctclink.us/m/79558//1027232-9-2-viewing-and-printing-student-transcript>

Conversion Detail - Transfer Credit & Transcript Classes

Conversion Background

Transfer credits from Legacy (entered in TRNSFR-COURSE-D) are converted to the equivalent area in PeopleSoft referred to as Course Credits Manual.

- On the PeopleSoft transcript, transfer credit totals appear at the top of the first page under the heading Transfer Credits Summary.
- Transfer credits are converted to PeopleSoft using the Transfer grading basis.

Transcript Classes (entered in TRAN-CLASS-D) with credits and grades but no matching class (legacy item number), are also converted to transfer credits in PeopleSoft and entered in Course Credits Manual. The source or "from" institution is converted as your institution.

However, unlike transfer credits, transcript classes appear as enrollments on the transcript rather than the Transfer Credit Summary.

- On the PeopleSoft transcript, classes entered in TRAN-CLASS-D (SM6013) will display as enrollments with the same class information detail as enrolled classes.
- Transcript classes are converted to PeopleSoft with a grade that was not categorized as a transfer grade. Transcript class grades should match the equivalent legacy grade and qualifier.

Transfer credit and transcript classes are not converted if:

- The grade and credit value in legacy is blank
- The course Subject is on the exclude list
- The course (department/division) was added to the exclude list

Transfer credit and transcript class entries can also be converted to another course:

- During the conversion process, the TRANSFR-COURSE-D and TRAN-CLASS-D records were compared to the Exclude/Transform file, decided on by your college. A legacy course ID may be transformed to a new PeopleSoft Subject and Catalog Number.

Common Conversion Issues

Transfer credit and transcript class conversion is impacted by upstream conversion issues including course catalog, enrollment and Bio/Demo.

- **Transfer Credit for University of Washington Multiple codes used**
 - A few students have transfer credit awarded for the UW using more than one code (410-413).
 - Transfer credit for one code was converted and the other was rejected as a duplicate.
 - To convert all UW credit, only one code can be used in SD3005. Review file and make updated to the legacy student record.
- **Students with Transcribed classes and transfer credit (where your institution is the "Transfer From" college)**
 - Only partial transfer/transcribed records were converted for students who have transcribed classes on SM6013 and Transfer credit on SD3005 where your college code is listed in the "Trnsfr From Col" field
 - Review file and update the student record so courses only exist on either SD3005 or SM6013
- **Continuing Education courses as Transfer or Transcribed classes**
 - Students who were awarded courses from the Continuing Education career failed to convert. In PeopleSoft, only academic courses can convert as transfer credit (or as a transcribed class)
 - Review file to determine if these courses should be Continuing Education.

Minimum Validation Requirements

Your validation process should confirm that transfer and transcribed classes converted as expected based on the curriculum mapping submitted by your college. You may also confirm that excluded courses did not convert. Verify that that transfer and transcript grades converted based on grade mapping submitted by your college.

Validation Steps – Transfer Credit & Transcript Classes

Transfer Credit Validation

This section provides guidance for validating Transfer Credit. Transcript Classes are covered in section 6.2. Transfer credit conversion can be validated by navigating to the PeopleSoft screen where the transfer credits were input (Course Credits Manual) or by running a query that displays the data from Course Credits Manual.

Step 1 - Run Query to Identify Students with Transfer Credit

Navigate to Query Viewer: Navigator > Reporting Tools > Query > Query Viewer

- Steps to Using Query
 1. Enter the query name: CTC_VAL_STDNT_TRANSFER_COURSES
 2. Click Search
 3. Enter your institution code
 4. Enter a term
 5. Click View Results
 - **TIP** Enter a term into the query prompts or there may be too many results to display.
 - Alternatively, you can enter a student ID (from PeopleSoft or Legacy) and leave the term prompt blank to view all transfer credits for a student.

Step 2 - Review Individual Student's Transfer Credit

Navigate to Course Credits Manual: Navigator > Records and Enrollment > Transfer Credit Evaluation > Course Credits Manual

- Steps to view student transfer credit:
 1. Enter a student ID
 2. Click search
 3. The Course Credits Manual screen will show your institution in the Transfer Credit Model section at the top.
 - **TIP** A student could have credits posted from more than one Source. Use the arrows at the top to view each one.

- The **Source Information** section will include the institution from which courses were transferred.
- Under the section **Incoming Course**, fillers were placed in all fields and will show a Subject of "XFER" and Course Nbr "XXX".
- The **Equivalent Course** section contains the transfer course data from Legacy.
- Click the arrows in the section headings to navigate to additional terms and courses that were posted.

Step 3 - Fields to Validate

- Using the Query results or data from the Course Credits Manual page in PeopleSoft, verify these fields and compare to student records in legacy TRANSFER-COURSE-D (SD3005):
 - Source Institution
 - Articulation Term
 - Subject and Catalog , displayed to the right Course ID
 - Units Transferred
 - Grading Basis
 - Official Grade

Transfer credits for a student in the Course Credits Manual screen

The screenshot displays the 'Transfer Credit Model' screen in PeopleSoft. Key sections and fields include:

- Transfer Credit Model:** Academic Career (UGRD), Academic Institution (WA171), *Model Nbr (1), *Transcript Level (Print on O).
- Target Information:** *Academic Program (ACADM), Academic Plan, Include in GPA checkbox.
- Source Information:** *Credit Source Type (Manual In), Source Institution (University of Washington), School Type (NA).
- Transfer Credit Term:** *Articulation Term (2006 FALL), Posted status.
- Incoming Course:** *Group*Seq# (1, 1), Year (2006), Ext Term, Status, Subject (XFER), Course Nbr (XXX), Description (Transferred-in Course), Units Taken (6.00), Grade Input (4.0).
- Equivalent Course:** Course ID (020007), Offer Nbr (1), Units Transferred (6.000), Grading Scheme (ACA), Grading Basis (TRN), Official Grade (4.0).

Transcript Class Validation

Transcript class conversion can be validated by navigating to the PeopleSoft page where the class credits were input (Course Credits Manual) or by running a query that displays the data from Course Credits Manual.

Step 1 - Run Query to Identify Students with Transcript Classes

Navigate to Query Viewer: Navigator > Reporting Tools > Query > Query Viewer

1. Enter the query name: CTC_VAL_STDNT_TRANSCRIPT_CLASS
2. Click Search
3. Enter your institution code
4. Enter a term
5. Click View Results
 - TIP Enter a term into the query prompts or the maximum number of results may be exceeded.
 - Alternatively, you can enter a student ID (from PeopleSoft or Legacy) and leave the term prompt blank to view all transcript classes for a student.

Step 2 - Review Individual Student Transcript Classes

Navigate to Course Credits Manual:

- Navigator > Records and Enrollment > Transfer Credit Evaluation > Course Credits Manual
 - Steps to view student transcript classes:
 1. Enter a student ID
 2. Click Search
 - The Course Credits Manual screen will show your institution in the Transfer Credit Model section at the top.
 - TIP A student could have credits posted from more than one Source, you can click the arrows at the top to view each one.
 - **Source Institution** To find transcript classes, verify your institution as the Source. If a student also has Transfer Credits they may have multiple "rows" with additional Source Institutions. Click through the arrows in the top header to locate your institution as the Source (figure below).
 - The course information in the **Incoming Course** section will match the information in the **Equivalent Course** section.
 - Click the arrows in the section headings to navigate to additional terms and courses that were posted.

Step 3 - Fields to Validate

- Using the Query results or data from the Course Credits Manual page in PeopleSoft, verify these fields to the student records in Legacy TRAN-CLASS-D (SM6013):
 - Source Institution = Your Institution
 - Articulation Term
 - Subject and Catalog , displayed to the right Course ID
 - Units Transferred
 - Grading Basis
 - Official Grade

Transcript classes for a student in the Course Credits Manual screen

The screenshot displays the 'Transfer Credit Model' and 'Transfer Credit Term' screens in PeopleSoft. The 'Transfer Credit Model' screen shows the 'Academic Institution' field set to 'WA220 Tacoma CC' and the 'Source Institution' field set to 'Tacoma Community College'. A callout box with arrows pointing to both fields contains the text 'Institutions will be the same for transcript classes'. The 'Transfer Credit Term' screen shows the 'Articulation Term' set to '2155 2015 SUMMR' and the 'Equivalent Course' section with fields for 'Course ID' (010453), 'ENGL&', 'Offer Nbr' (1), 'Units Transferred' (5.000), 'Grading Basis' (SUS), and 'Official Grade' (S). The 'Incoming Course' section shows 'Year' (2015), 'Subject' (ENGL&), 'Course Nbr' (101), 'Description' (ENGLISH COMPOSITION I), and 'Units Taken' (5.00). Navigation controls at the top of both screens show '1 of 1' and '1 of 4' respectively, indicating the current record in the list.

Step 4 - Validate Transcript Class Grading Basis

In PeopleSoft, grades are assigned to a category called a Grading Basis, used to organize and apply different grade settings such as Administrative, Audit, Grade Forgiveness and Transfer. Legacy grades for transcript classes are mapped to a PeopleSoft Grading Basis.

Use the query below to show grades for transcript classes by Grading Basis.

Navigate to Query Viewer: Navigator > Reporting Tools > Query > Query Viewer

Steps to Using Query -

1. Enter the query name: CTC_VAL_STDNT_TRNSCR_CLASS_GRD

2. Click Search
3. Enter your institution code
4. Using the dropdown menu, select the Grading Basis description.
5. Click View Results
 - **TIP** - All values for Grading Basis will be available to select in the dropdown box, including values your college does not use.

Conversion Detail – Transcript Text

Conversion Background

Transcript Comments entered in SM6012 (TRAN-COMMENT-D) are converted to the equivalent area in PeopleSoft, referred to as Transcript Text. Both the Official and Unofficial PeopleSoft transcript will display transcript text. This includes comments that were entered for:

- Notations for transcript classes and transfer credit
- Quarterly Honors & Awards
- Degree Honors

SM6012-004		TRANSCRIPT COMMENTS	
SID [940][45][]			
YRQ	Comment Num	Tran Comment	
[]	[]	[]	
[B782]	[1]	[HONOR ROLL-VICE PRESIDENT LIST]	
[]	[]	[]	

Transcript text will display on the student's PeopleSoft transcript based on the YRQ used in legacy:

- If the Legacy YRQ value was a specific term, the PeopleSoft term will be populated and transcript text printed after the term on the transcript (figure below, box 1).
- If the Legacy YRQ was "9999", "Z999", blank, or there was no enrollment for the term, transcript text is printed at the end of the transcript after the cumulative statistics (figure below, box 2).

SPRING 2015 (03/30/2015 - 06/12/2015)							
<u>Course</u>		<u>Description</u>	<u>Attempted</u>	<u>Earned</u>	<u>Grade</u>	<u>Points</u>	
ACCT&	202	Principles Of Acctnt Ii [Ccn]	5.000	5.000	A-	18.500	
ECON&	201	Micro Economics [Ccn]	5.000	5.000	A-	18.500	
PE	190	Health And Wellness	3.000	3.000	A	12.000	
			<u>Attempted</u>	<u>Earned</u>	<u>GPA Units</u>	<u>Points</u>	
	Term GPA	3.770	Term Totals	13.000	13.000	13.000	49.000
1	Graduation with HONORS HIGH HONORS						
	Academic Career Career Totals						
	Cum GPA	3.680	Cum Totals	87.000	87.000	87.000	320.000
2	TRANSFER CREDITS ACCEPTED: LANE COMMUNITY COLLEGE:		12.0				
End of Official Transcript - Academic Career							

Common Conversion Issues

Transcript text conversion (including degree and quarterly honors) is impacted by upstream conversions including enrollment. If the enrollment for a term (YRQ) is not converted, transcript text for that term will be placed after the cumulative statistics on the PeopleSoft transcript.

Minimum Validation Requirements

It is recommended to validate a variety of transcript comments based on how your college has utilized this page. Scenarios may include comments related to transfer credit, Academic Credit for Prior Learning, Advanced Placement credit, grade forgiveness, and similar topics.

Validation Steps - Transcript Text

Transcript Text can be validated using the query described below as well as navigating to the Transcript Text page in PeopleSoft. Conversion results should be compared to the legacy Transcript Comments in SM6012.

Step 1 – Run Query to Identify Students with Transcript Text

Navigate to Query Viewer:

- Navigator > Reporting Tools > Query > Query Viewer
 1. Enter the query name: CTC_VAL_STDNT_TRANSCRIPT_TEXT
 2. Click Search
 3. Enter your institution code
 4. Enter a term
 5. Click "View Results"
 6. Make note of student ID's for validation
 7. Run the query again populating the prompts for one student ID and your institution, leaving the other prompts blank:
 - All transcript text entries for the student from all terms will be displayed
 8. You can also search for key words within transcript text using the Text Search prompt
 - This prompt is case sensitive. The case of the text you enter, will be exactly what the query looks for in transcript text.
 - Entering "HONOR ROLL" will not return transcript text typed as "Honor Roll".
 - You can search for a portion of text within the transcript text by typing the % symbol before and after your search words.
 - Entering %Honors% will return "High Honors for term" along with "High Honors"

Step 2 - Review Individual Student's Transcript Text

You can also validate transcript comments by navigating to the Transcript Text page in PeopleSoft.

Navigation to Transcript Text: Navigator > Records and Enrollment > Transcripts > Transcript Text

- Steps to Searching for a Student
 1. Enter the student's ID
 2. Click Search
 3. **TIP** The student's name will appear in the search results multiple times if they have more than one program/plan stack. Clicking on any of these rows will take you to the same page.

What to validate:

Using the Query results or data from the Transcript Text page in PeopleSoft, confirm these fields match the student's legacy record:

1. Verify your Institution
2. Term (can also be blank)
3. Print Location (Cumulative Stats or Term Stats)
4. Transcript Text
 - **TIP** - When validating using the Transcript Text page, a student may have multiple terms with transcript text, or multiple rows of text within a term. You can navigate through terms and rows by using the arrows or clicking the View All link.

The screenshot displays the PeopleSoft Academic Career UGRD interface. At the top, the breadcrumb navigation shows 'Academic Career UGRD Academic Career'. Below this, there are search and navigation controls including 'Find | View All', 'First', '1 of 5', and 'Last'. The main search area contains several filters: '*Print Loc Seq' set to '1', '*Relative Position' set to 'After', '*Print Location' set to 'Cumulative Stats', '*Institution' set to 'WA220', and 'Tacoma CC'. A 'Term' field is also present. Below the search filters, there are two sections for transcript reports. The first section, 'Transcript Report', has '*Text Seq Nbr' set to '1' and 'Transcript Level' set to 'Print on Offi'. It contains a 'Transcript Type' field and a 'Transcript Text' field with the text 'TRANSFER CREDITS ACCEPTED:'. The second section, 'Transcript Report COBOL', also has a 'Transcript Type' field and an empty 'Transcript Text' field. Red boxes highlight the '1 of 5' and '1 of 2' navigation indicators, and the 'Institution', 'Print Location', and 'Transcript Text' fields.

Step 3 - Compare the Legacy and PeopleSoft Transcripts

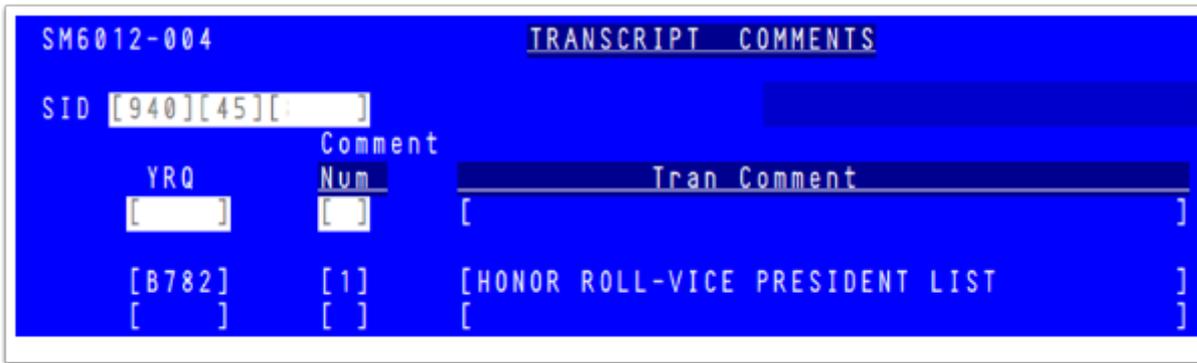
Generate a PeopleSoft transcript for the student and compare the classes displayed to those on the legacy transcript.

- **Navigation:** Main Menu > Records and Enrollment > Student Term Information > Term History
 - Steps to Generate a Transcript: <http://ctclinkreferencecenter.ctclink.us/m/79558//1027232-9-2-viewing-and-printing-student-transcript>

Conversion Detail - Quarterly Honors & Awards

Conversion Background

Quarterly Honors and Awards that were posted in the legacy Transcript Comments Page, SM6012, (TRAN-COMMENT-D) are converted to PeopleSoft as Transcript Text.



Transcript text will display on the Official and Unofficial PeopleSoft transcript based on the YRQ used in legacy:

- If the Legacy YRQ value was a specific term, the PeopleSoft term will be populated and transcript text printed after the term on the transcript (figure below, box 1).
- If the Legacy YRQ was "9999", "Z999", blank, or there was no enrollment for the term, transcript text is printed at the end of the transcript after the cumulative statistics (figure below, box 2).

SPRING 2015 (03/30/2015 - 06/12/2015)						
<u>Course</u>		<u>Description</u>	<u>Attempted</u>	<u>Earned</u>	<u>Grade</u>	<u>Points</u>
ACCT&	202	Principles Of Acctn II [Ccn]	5.000	5.000	A-	18.500
ECON&	201	Micro Economics [Ccn]	5.000	5.000	A-	18.500
PE	190	Health And Wellness	3.000	3.000	A	12.000
			<u>Attempted</u>	<u>Earned</u>	<u>GPA Units</u>	<u>Points</u>
Term GPA	3.770	Term Totals	13.000	13.000	13.000	49.000
1	Graduation with HONORS HIGH HONORS					
Academic Career Career Totals						
Cum GPA	3.680	Cum Totals	87.000	87.000	87.000	320.000
2	TRANSFER CREDITS ACCEPTED: LANE COMMUNITY COLLEGE: 12.0					
End of Official Transcript - Academic Career						

Common Conversion Issues

Students who were affected by course catalog and enrollment conversion errors may not have been activated for terms in which transcript text was entered. Transcript text for these students will be placed after the cumulative statistics area of the transcript.

Minimum Validation Requirements

Your validation process should confirm that legacy Transcript Comments in SM6012 converted to PeopleSoft Transcript Text. Also confirm the text displays in the correct location either with the associated term or at the end of the transcript.

Validation Steps - Quarterly Honors and Awards

This section provides step-by-step guidance for validating Quarterly Honors and Awards. The ctcLink Project team has created a PeopleSoft query to identify applicable students. You can validate Transcript Text using this query, as well as navigating to the Transcript Text page in Peoplesoft. Compare the Transcript Text page in PeopleSoft, to the legacy Transcript Comments screen (SM6012).

Step 1 - Run Query to Identify Students with Transcript Text

Navigate to Query Viewer:

- Navigator > Reporting Tools > Query > Query Viewer
 1. Enter the query name: CTC_VAL_STDNT_TRANSCRIPT_TEXT
 2. Click Search
 3. Enter your institution code
 4. Enter a term, click View Results
 5. Make note of student ID's for validation
 6. Run the query again using one of the ID's, leaving
 - All of the transcript text entries for one student entered by your institution will be displayed
 7. You can also search for words within the transcript text using the Text Search prompt
 - This prompt is case sensitive. The case of the text you enter, will be exactly what the query looks for in transcript text.
 - Entering "HONOR ROLL" will not return transcript text typed as "Honor Roll".
 - You can search for a portion of text within the transcript text by typing the % symbol before and after your search words.
 - Entering %Honors% will return "High Honors for term" along with "High Honors"

Institution 
Term (optional) 
ctcLink ID (optional) 
Legacy ID (optional)
Text Search: Put % Before/After

Step 2 - Review Individual Student's Transcript Text

You can also validate transcript comments by navigating to the Transcript Text page in PeopleSoft.

Navigate to Transcript Text: Navigator > Records and Enrollment > Transcripts > Transcript Text

1. Enter the student's ID
2. Click Search
3. **TIP** The student's name will appear in the search results multiple times if they have more than one program/plan stack. Clicking on any of these rows will take you to the same page.

What to Validate:

Using the Query results or data from the Transcript Text page in PeopleSoft, confirm these fields match the student's Legacy data:

1. Verify your Institution
2. Term (can also be blank)
3. Print Location (Cumulative Stats or Term Stats)
4. Transcript Text
 - **TIP** When validating using the Transcript Text page, a student may have multiple terms with transcript text, or multiple rows of text within a term. You can navigate through terms and rows by using the arrows or clicking the View All link.

Academic Career UGRD Academic Career

Find | View All First 1 of 5 Last

*Print Loc Seq 1 *Relative Position After *Print Location Cumulative Stats

*Institution WA220 Tacoma CC

Term

Find | View All First 1 of 2 Last

*Text Seq Nbr 1 Transcript Level Print on Off

Transcript Report

Transcript Type

Transcript Text TRANSFER CREDITS ACCEPTED:

Transcript Report COBOL

Transcript Type

Transcript Text

Conversion Detail - Degree Honors

Conversion Background

Student degree honors are converted to PeopleSoft as Transcript Text. Depending on how your college entered this data in legacy, degree honors were extracted from TRAN-COMMENT-D or TRAN-DEGREE-D.

If the degree honor was entered as a transcript comment (SM6012), the comment will convert directly with the exact text. Transcript text will display on the student's PeopleSoft transcript based on the YRQ used in legacy:

- Valid YRQ - associated to the equivalent term and printed after term statistics
- Generic/Z999 or Blank - printed at the end of the transcript after the cumulative statistics

If degree honors were entered on the student degrees page (SM6009), additional measures were taken to extract this data. Each award must be entered as a separate line using the custom conversion EPCs for degree honors. A specialized mass update job was developed to assist with this separation. Depending on the conversion EPC used, the following Transcript Text will convert:

Degree Honors EPC	PeopleSoft Transcript Text
HONS	Graduation with Honors
HHON	Graduation with High Honors
HIHO	Graduation with Highest Honors
CL	Graduation with Cum Laude
MCL	Graduation with Magna Cum Laude
SCL	Graduation with Summa Cum Laude
DL	Graduation with Dean's List
DSCL	Graduation with Dean's Scholars
PL	Graduation with President's List
PM	Graduation with President's Medal
PSCL	Graduation with President's Scholars
WDIS	Graduation with Distinction
WHDI	Graduation with High Distinction

Common Conversion Issues

Students who were affected by course catalog and enrollment conversion errors may not have been activated for terms in which transcript text was entered. Transcript text for these students will be placed after the cumulative statistics area of the transcript.

Minimum Validation Requirements

Validators should confirm legacy degree honors converted successfully as Transcript Text and are recommended to:

- Validate students for each Degree Honors EPC used by your college
- Verify the degree honors are printing on the transcript as expected

Validation Steps - Degree Honors

The mapping information included in this section provides guidance for validating degree honors. The ctLink Project team has created a PeopleSoft query to identify applicable students. You can validate Transcript Text using this query as well as navigating to the PeopleSoft page where this information is housed. Navigation for pages applicable to this validation is provided in the steps below. Please compare to the legacy screen where your college enters degree honors.

Step 1 - Run Query to Identify Students with Transcript Text

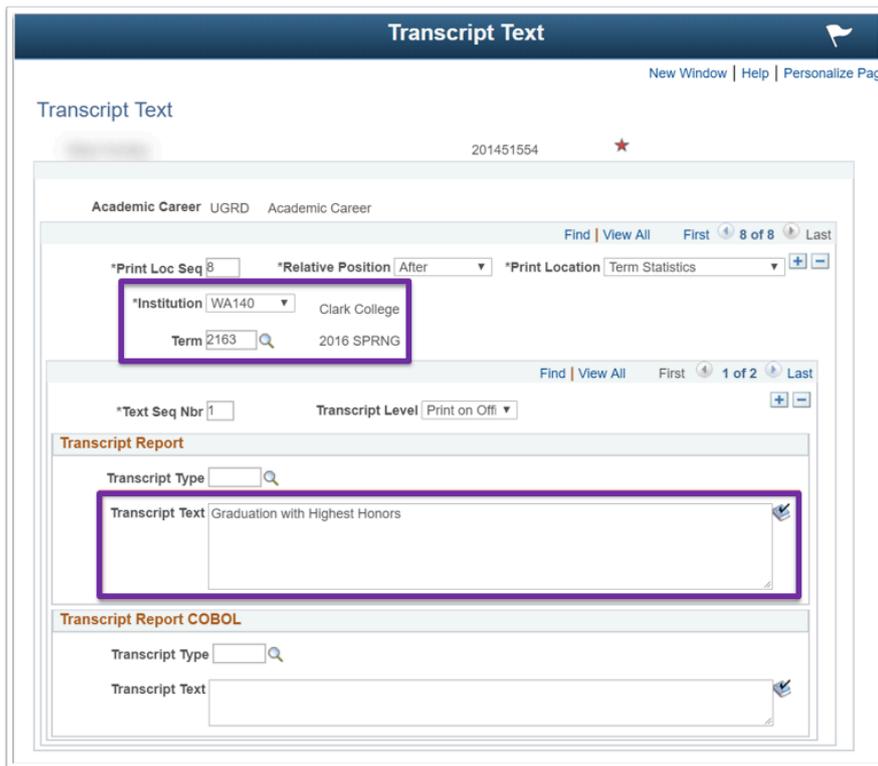
Run the query listed below as the first step in validation. This query will help you identify students with converted degree honors. You can then use the student IDs to view their records in the PeopleSoft pages and compare to legacy data.

- **Navigation to Query Viewer:** Navigator > Reporting Tools > Query > Query Viewer
 1. Enter the query name: CTC_VAL_STDNT_TRANSCRIPT_TEXT
 2. Click Search
 3. Select the "HTML" hyperlink to run the query in your browser. You can download the results directly from this page.
 4. Select prompts
 5. Use the Text Search prompt
 - **TIP:** This prompt is case sensitive. The case of the text you enter, will be exactly what the query looks for in transcript text. Example Entering "HONOR ROLL" will not return transcript text typed as "Honor Roll".
 - **TIP:** You can search for a portion of text within the transcript text by typing the % symbol before and after your search words. Example Entering %Honors% will return "High Honors" along with "Graduation with High Honors"
 6. Make note of student ID's for validation

Step 2 - Review Individual Student's Transcript Text

- **Navigation to Transcript Text:** Updated Records and Enrollment Transcripts Transcript Text
 - Steps to Search for Transcript Text
 1. Enter the student's ID
 2. Click Search
 3. TIP The student's name will appear in the search results multiple times if they have more than one program/plan stack. Clicking on any of these rows will take you to the same page.
 4. Fields to Validate
 5. Using the Query results or data from the Transcript Text page in PeopleSoft, confirm these fields match the student's legacy record:
 6. Verify your Institution
 7. Term (can also be blank)
 8. Print Location (Cumulative Stats or Term Stats)
 9. Transcript Text
 10. **TIP** When validating using the Transcript Text page, a student may have multiple terms with transcript text, or multiple rows of text within a term. You can navigate through terms and rows by using the arrows or clicking the View All link.

Figure 1 Converted Degree Honors Transcript Text



Step 3 - Compare the Legacy and PeopleSoft Transcripts

Generate a PeopleSoft transcript for the student and compare the classes displayed to those on the legacy transcript.

- **Navigation:** Navigator > Records and Enrollment > Student Term Information > Term History
 - Steps to Generate a Transcript: <http://ctclinkreferencecenter.ctclink.us/m/79558/1027232-9-2-viewing-and-printing-student-transcript>

Submitting Data Validation Results

College Data Validation SMEs will communicate any conversion issues they encounter during their data validation via the Oracle Test Manager (OTM) application. The ctLink Testing Team will provide OTM orientation materials before the data validation period for any College Data Validation SMEs who are not familiar with the tool. Please refer to the [Data Validation Overview - Reporting Issues](#) guide for more information on using OTM.

When logging a new issue in OTM related to data being validated through this guide, remember to use the following values for these specific required fields in your issue entry under the project tied to this Deployment Group and CS Data Validation Cycle.

- **Summary:** *(Provide a title for the issue discovered)*
- **Assigned To:** Karen Erickson (Transfer Credit & Enrollment) or Matt Sargent (Transcript Text and Quarterly/Degree Honors)

- **Status:** *(Leave as NEW)*
- **College or Location :** *(Specify the college or district)*
- **Priority:** *(Leave blank - not used)*