



## **ERSD (Degree) Setup and Process Guide v. 8.0**

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This document is published as a baseline guide. Page shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS SA team.

## Table of Contents

	Page
Section 1	ERS Degree Report Setup Guide Summary:..... 1
Section 2	ERSD Data Elements..... 1
2.1	Social Security Number..... 1
2.2	Year ..... 1
2.3	Term Code ..... 1
2.4	Campus Code ..... 1
2.5	Birth Date ..... 1
2.6	Sex Code..... 1
2.7	Ethnic Code..... 1
2.8	Citizenship Code ..... 1
2.9	Country Of Citizenship ..... 1
2.10	High School Graduation Year ..... 1
2.11	Residence Code..... 2
2.12	Residence Status ..... 2
2.13	Institution Origin Code..... 2
2.14	Matriculation Period..... 2
2.15	Admission Basis Code ..... 3
2.16	Exception Admission Code ..... 3
2.17	Degree Level ..... 3
2.18	Major Degree Code ..... 5
2.19	Transfer Units Earned ..... 7
2.20	Transfer GPA ..... 7
2.21	Campus GPA ..... 7
2.22	Total Units Earned..... 9
2.23	Total GPA..... 9
2.24	CIP Code..... 9
2.25	Multiple Major Degree Flag ..... 9
2.26	Multiple Ethnicities flag..... 10
Section 3	Processing the Extracts ..... 11
3.1	ERS Setup Page ..... 11
3.1.1	Considerations..... 11
3.2	Assign Report Titles ..... 12
3.2.1	Considerations..... 12
3.3	ERSD Extract ..... 13

- 3.4 Reviewing and Updating the Staging Tables ..... 14
  - 3.4.1 Considerations..... 15
- 3.5 ERSD Rpt Format ..... 15
  - 3.5.1 Considerations..... 16
- 3.6 ERSD Supplementary Multiple Major Degree Report..... 16
- 3.7 Running the ERSD edit process ..... 17
  - 3.7.1 Consideration..... 17

## **Section 1 ERS Degree Report Setup Guide Summary:**

The Chancellor's Office (CO) has a variety of Enrollment Reporting System (ERS) reports that are required from the campuses on a regular schedule. The format of these reports can be changed as the political environment necessitates, and campuses must be able to keep pace with these changes. In addition, the format and data elements required for CO reporting are not always directly related to those required to run the day-to-day operations at a campus. Therefore, many of the data elements required for CO reporting are not stored in the vanilla PeopleSoft HR/SA database, and there is no simple manner using end-user tools (such as query) to generate these reports accurately. This setup guide details each element and how the values that are reported to the CO are captured or derived in PeopleSoft.

In addition, the CO through the "COSAR" tables provides many of the codes that are used in generating the reports. The reporting programs will make use of these tables and facilities for mapping codes used in PeopleSoft HR/SA to the codes in these tables.

For detailed descriptions of the individual data elements, please refer to the 2002 Enrollment Reporting System Operations Manual.

## **Section 2 ERSD Data Elements**

### **2.1 Social Security Number**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.2 Year**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.3 Term Code**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.4 Campus Code**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.5 Birth Date**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.6 Sex Code**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.7 Ethnic Code**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.8 Citizenship Code**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.9 Country Of Citizenship**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### **2.10 High School Graduation Year**

This element is the year of graduation from high school. If a student is currently enrolled in high school, code the anticipated year of graduation.

**Collection Method:** This data will be extracted from the education page where the transcript type = official and the transcript status = final and the career = high school

**Page Name:** Education

**Navigation:** Develop Enrollment → Process Applications → Use → Education → External Data

**Values:** yyyy = 1920 to 9999

**2.11 Residence Code**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

**2.12 Residence Status**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

**2.13 Institution Origin Code**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

**2.14 Matriculation Period**

Matriculation Period is the year and term of first attendance in any term of the regular sessions at the reporting California State University. A student shall be in attendance if he registers and pays fees. The date of first attendance for a post baccalaureate student shall be the year and term of first attendance after earning a baccalaureate degree.

**Collection Method:** For undergraduate degrees this will to be the first term of undergraduate enrollments providing that the student did not drop before the census date. Post baccalaureate will be the first term of post baccalaureate enrollments providing that the student did not drop before.

**Values:** YYYYT where Term = 1 = Winter qtr 2 = Spring 3 = Summer 4 = Fall

### 2.15 Admission Basis Code

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### 2.16 Exception Admission Code

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

### 2.17 Degree Level

A code that indicates the level of the degree conferred at a CSU campus.

**Collection Method:** This value will be mapped from the Degree Setup Page/ERS Mapping Sub-page. The value reported will be based on the degree code associated with the student on their degree record.

**Page Name:** Degree Table

**Navigation:** Design Student Administration → Define Student Administration → Setup → Degree Table

PEOPLE Soft

Home Worklist Help

Degree Degree Honors Degree Plan Degree Sub-Plan

Scott Jones ID: 0001936

View All First 1 of 1 Last

\*Degree Nbr: 01

\*Degree: BA Bachelor of Arts

\*Institution: CCUNR Test University

Primary Career: UGRD Undergraduate

\*Completion Term: 2017 Fall 2001

\*Confer Date: 07/19/2002

\*Degr Stat: Awarded

Degree Status Date: 07/11/2002

Degree GPA: 3.50

Honors Prefix

Prefix: Suffix:

Rank/Size

Class Rank: Of

Save Return to Search

Degree | Degree Honors | Degree Plan | Degree Sub-Plan

The Degree on the student's degree record is mapped back to the values on the ERS mapping sub-page on the Degree Setup Page.

**Values:**

- 2 = Bachelor of Arts Degree (BA)**
- 3 = Bachelor of Science Degree (BS)**
- 4 = Other Bachelor's Degree**
- 5 = Master of Arts Degree (MA)**
- 6 = Master of Science Degree (MS)**
- 7 = Other Master's Degree**
- 8 = Joint Doctorate**

## 2.18 Major Degree Code

Major Degree Code is reported in the primary ERSD file. This is a code, which identifies the major area of study for which the degree was conferred. In the supplementary ERSD file, this is a code, which identifies additional major areas of study for which a degree was conferred.

**Collection Method: CSU Hegis Code has been added to the plan taxonomy panel. The value in this field will be the Major Degree Code COSAR table 34, which is mapped to the Academic Plan in the Academic Structure setup (see screen shots below). For ERSD this will be the major degree code from the primary plan, i.e. the first active plan from the program/plan table.**

### Page Name: Academic Plan Table

**Navigation: Design Student Administration → Design Academic Structure → Setup → Academic Plan Table**

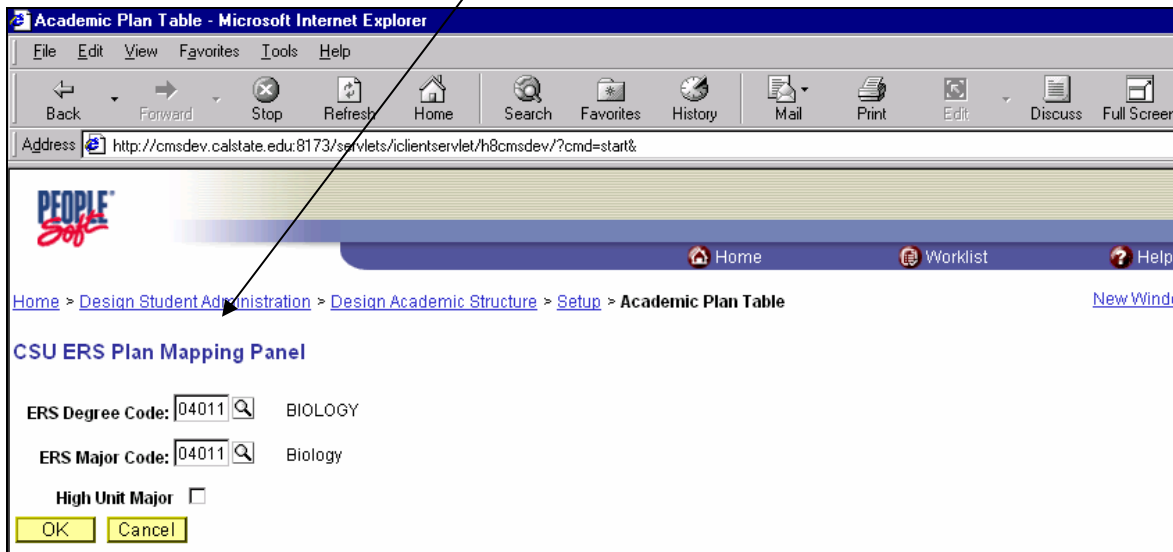
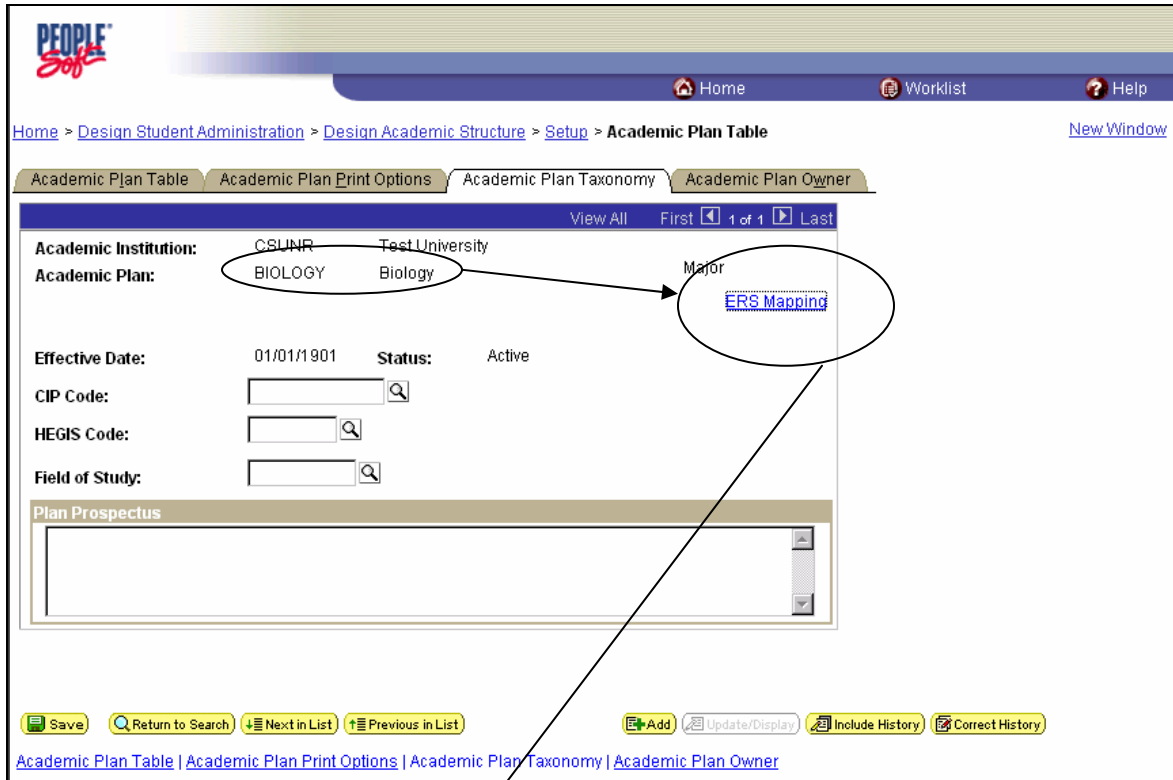
The screenshot displays the 'Academic Plan Table' setup interface. At the top, there is a navigation breadcrumb: Home > Design Student Administration > Design Academic Structure > Setup > Academic Plan Table. Below this, there are tabs for 'Academic Plan Table', 'Academic Plan Print Options', 'Academic Plan Taxonomy', and 'Academic Plan Owner'. The main form area contains the following fields and values:

- Academic Institution:** CSUNR Test University
- Academic Plan:** BIOLOGY
- Effective Date:** 01/01/1901
- Status:** Active
- Academic Program:** UNDGF Undergraduate
- Academic Career:** (Empty)
- Academic Plan Type:** Major
- Description:** Biology
- Short Description:** BIO
- First Term Valid:** (Empty)
- Degree Offered:** MS
- Req Term Default:** Program's Admit Term
- Transcript Level:** Official
- Evaluate Plan Before Program

At the bottom of the form, there are several action buttons: Save, Return to Search, Next in List, Previous in List, Add, Update/Display, Include History, and Correct History. A breadcrumb trail at the very bottom reads: Academic Plan Table | Academic Plan Print Options | Academic Plan Taxonomy | Academic Plan Owner.

**Page Name: Academic Plan Taxonomy**

**Navigation: Design Student Administration → Design Academic Structure → Setup → Academic Plan Table**



**Page Name: Degree Plan**

**Navigation:** Manage Student Records → Track Student Careers → Use → Degree Plan

The screenshot shows the PEOPLE Soft interface for the Student Degrees component. The user is Kermit Frog (ID: 000003068). The 'Degree Plan' tab is selected. The 'Student Degree Nbr' is 01. The 'Degree Plan Detail' section shows the following information:

- 'Plan Seq: 10
- Career: UGRD (Undergraduate)
- 'Degr Stat: Awarded
- Degr Dt: 07/08/2002
- Acad Plan: BIOLOGY (Biology)
- Plan Type: Major

The 'Acad Plan' field is circled in red, and an arrow points from a callout box to it. The callout box contains the text: "When the Plan is selected on the Degree Plan Page of the Student Degrees Component, the Academic Plan mapping will determine the value that is reported."

**Values: COSAR Table 34**

**2.19 Transfer Units Earned**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

**2.20 Transfer GPA**

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

**2.21 Campus GPA**

This will be the quotient of total grade points and total units attempted for a letter grade.

**Collection Method:** The ERS Setup Page will ask for Special GPA code for Campus GPA – the Report Type should be Degree. This value is calculated and stored in the Special GPA table for each student. This value is calculated by a CSU Additional GPA modification. When the process is run for the Degree Report, the SQR will look for the Campus GPA field on the ERS Setup Page for the Degree Report Type and then look into the STDNT\_SPCL\_GPA record to match the specified GPA type value against the student being reported and extract the GPA for the GPA Type specified on the ERS Setup page.

**Page Name: ERS Report Setup**

**Navigation:** CSU SA Baseline → CSU CO Reporting → Use → ERS Setup → ERS Setup 1

PEOPLE Soft

Home Worklist Help

Home > CSU SA Baseline > CSU CO Reporting > ERS Setup > ERS Report Setup [New Window](#)

ERS Setup1

School Code: 70 California State University, Northridge Report Type: DEGR

Academic Career: GRAD Report Code: RPT5 Academic Institution: CSUNR

Term: 2017 Fall 2001 Term Type: S GPA Summary Type:

Trans GPA Type: GPA4 Campus GPA: GPA6 HS GPA Type:

Save Return to Search Next in List Previous in List Add Update/Display

**Page Name: Student Special GPA**

**Navigation: Manage Student Records → Manage Academic Records → Use → Term History → Student Special GPA**

PEOPLE Soft

Home Worklist Help

Home > Manage Student Records > Manage Academic Records > Use > Term History [New Window](#)

Term Withdrawal Session Withdrawal Academic Standing Student Grade Review Student Special GPA

Kermit Frog ID: 000003068

View All First 1 of 1 Last

Academic Career: Undergraduate View All First 3 of 3 Last

Term: Fall 2001 Test University View All First 2 of 2 Last

\*GPA Type: GPA6 Resident GPA - Cumulative Sequence: 2

\*GPA: 2.500 Entered Online

Academic Program:

Academic Plan:

Academic Sub-Plan:

User ID: KOCONNOR Jones, Scott Action Dt: 06/27/2002

Save Return to Search Update/Display Include History Correct History

[Term Statistics](#) | [Cumulative Statistics](#) | [Term Withdrawal](#) | [Session Withdrawal](#) | [Academic Standing](#) | [Student Grade Review](#) | [Student Special GPA](#)

**Values: 000 to 400 the decimal is implied and not entered. For example: 3.50 would be entered as 350.**

## 2.22 Total Units Earned

For undergraduate students, the total transferable units earned at all colleges, plus the total units earned at the reporting campus. For post baccalaureate students, the total transferable units earned at all colleges, plus the total units earned at the reporting campus (subsequent to receiving the baccalaureate degree). Please note: Wherever a student received a degree, report only those additional units subsequently earned that are applied toward the next degree requirements.

**Collection Method: The Total Units Earned will be collected from the student's Student Career Term Record - TOT\_CUMULATIVE units field.**

**Values: 0001 to 9999 the decimal is implied and not entered. For example: 55 units would be entered as 0550.**

## 2.23 Total GPA

This is the cumulative grade point average in all courses taken at all colleges. This is the quotient of total grade points and total units attempted for a letter grade (i.e., the sum of campus units and transfer units completed for a letter grade).

**Collection Method: The Total GPA will be collected from the PeopleSoft delivered STDNT\_CAR\_TERM - CUM\_GPA field for the student.**

**Values: 000 to 400 the decimal is implied and not entered. For example: 2.50 would be entered as 250.**

## 2.24 CIP Code

This Element is the same as ERSA – Please refer to the ERSA setup Guide.

## 2.25 Multiple Major Degree Flag

This field contains the number of additional majors for which the degree was conferred. DO NOT include the primary major degree code in this number.

**Collection Method: This is the number of additional plans attached the student, where the program status equals completed and the plan type equals major, other than the primary plan.**

**Page Name: Degree Plan**

**Navigation: Manage Student Records → Track Student Careers → Use → Degree Plan**

The screenshot displays the 'Degree Plan' form for student Kermit Frog (ID: 000003068). The form is titled 'Degree Plan Detail' and includes the following fields:

- Student Degree Nbr:** 01
- Plan Seq:** 10
- Career:** UGRD (Undergraduate)
- Career Nbr:** 0
- Acad Plan:** BIOLOGY (Biology)
- Degr Stat:** Awarded
- Degr Dt:** 07/08/2002
- Plan Type:** Major

Below the main details, there are sections for 'Honors Detail' and 'Diploma Description'. The 'Honors Detail' section includes an 'Override' checkbox, 'Honors Prefix', 'Transcript Description' (BIOLOGY), and 'Honors Suffix'. The 'Diploma Description' section shows 'BIOLOGY'.

**Values: 0 to 9**

**2.26 Multiple Ethnicities flag**

This code identifies a student reporting multiple ethnicities.

**Collection Method: N or Blank = Student has reported 0 or 1 ethnicities if a student reports more than one Ethnicity Detail then = Y. If the Student reports more than one Ethnicity in the ETHNICITY\_DTL record, the report will derive the value N, Y or Blank.**

## Section 3 Processing the Extracts

### 3.1 ERS Setup Page

Select the Degree as the Report type to setup the values on this page that will be used by the Degree Report extract.

#### Page Name ERS Report Setup

Navigation: CSU SA Baseline → CSU CO Reporting → ERS Setup

PEOPLE'Soft

Home Worklist Help

Home > CSU SA Baseline > CSU CO Reporting > ERS Setup > ERS Report Setup [New Window](#)

ERS Setup1

School Code:	70	California State University, Northridge	Report Type:	DEGR	
Academic Career:	UGRD	Report Code:	RPT5	Academic Institution:	CSUNR

Term:	2017	Fall 2001	Term Type:	S	GPA Summary Type:	
Trans GPA Type:	GPA4	Campus GPA:	GPA6	HS GPA Type:		

Save Return to Search Next in List Previous in List Add Update/Display

#### 3.1.1 Considerations

In order for a student to be selected for this report, a “Completed” row must exist in the Student Program/Plan Component. For each report code you must complete the above pages. The key for adding a setup page for the report code is your school code, academic institution, the report type, and the academic career.

#### ERS Setup 1:

**TERM:** The term this report is generated for.

**TERM TYPE:** Choose the value that applies to your campus from the following values:

C	<a href="#">Clock Hours</a>
E	<a href="#">Continuing Education Units</a>
Q	<a href="#">Quarter Hours</a>
S	<a href="#">Semester Hours</a>
T	<a href="#">Trimester Hours</a>
U	<a href="#">Units</a>

**Trans GPA Type:** Select the GPA type you created to store the GPA for Transfer work. This GPA is stored on the special GPA page.

**Campus GPA:** Select the GPA type you created to store the GPA for Campus work. This GPA is stored on the special GPA page.

### 3.2 Assign Report Titles

A unique Report Title can be used for each ERS report that is run. On the page, you can map the unique report code to the report type.

#### Page Name Assign Report Titles

**Navigation:** CSU SA Baseline → CSU CO Reporting → ERS Setup → Assign Report Titles

PEOPLE'S Soft

Home Worklist Help

Home > CSU SA Baseline > CSU CO Reporting > ERS Setup > Assign Report Titles [New Window](#)

CSU Report Titles

CSU CO School Code: 70 California State University, Northridge

ERS Report Details [View All](#) First 2 of 4 Last

Report Code	Type	Title	
<input type="text" value="RPT5"/>	<input type="text" value="Degree"/>	<input type="text" value="RPT5 DEGREE"/>	<input type="button" value="+"/> <input type="button" value="-"/>

#### 3.2.1 Considerations

Each report you wish to permanently store must have a unique report code. You may create as many report codes as you wish. For example you may wish to extract a preliminary Fall term report and a Final Fall Term report generated two weeks apart. You may then create comparison reports between the two files.

**Report Code:** A unique user defined code for each permanently stored extract.

**Type:** Translate values. Choose between Applicant, Degree, Student, or credential.

**Title:** Description of the report

### 3.3 ERSD Extract

Specify the values on the Run Control to determine which Institution, School Code, Term, Report Code and Type to run for this process. This process will extract data for each student and place that data into the Staging Table for the report.

**Page Name: ERSD Extract**

**Navigation: CSU SA Baseline → CSU CO Reporting → ERS Proc → ERS Degree + Sup-Selection**

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	CSUC0014 ERS Degree Select	CSUC0014	SQR Report		

### 3.4 Reviewing and Updating the Staging Tables

The data that was extracted for each student is accessible in the ERSD Staging Table.

**Page name: Degree 1**

**Navigation: Home → CSU SA Baseline → CSU CO Reporting → Use → ERSD Stage**

PEOPLE'S Soft

Home Worklist Help

Home > CSU SA Baseline > CSU CO Reporting > Use > ERSD Stage [New Window](#)

Degree 1 Degree 2

User ID: KOCONNOR Run Cntl ID: KOCONNOR  
Report Code: RPT5 RPT5 DEGREE Line Number: 0000001

EmpID: 000001950 Engel,Taylor SSN: 130-56-1111

School Code: 70 California State University, Northridge

Year: 2001 Term: 4

Birth Date: 04/13/1985 Sex: Male Ethnic Code: Ind / Alas

Citizenship Cd: US Cit Country: 7900 Multiple Ethnicities: Multi Eth

Res Cd: 0006 Residence Status: CA Resid

Save Return to Search Next in List Previous in List Add Update/Display

**Page name: Degree 2**

PEOPLE'S Soft

Home Worklist Help

Home > CSU SA Baseline > CSU CO Reporting > Use > ERSD Stage [New Window](#)

Degree 1 Degree 2

User ID: KOCONNOR Run Cntl ID: KOCONNOR  
Report Code: RPT5 RPT5 DEGREE Line Number: 0000001

EmpID: 000001950 Engel,Taylor SSN: 130-56-1111

HS Grad Yr: Ext Inst: 013005

Matric Per: 20014 Adm Bas Cd: 1 Excp Adm Cd: Campus GPA: 000

Trans Unts: 0003 Trans GPA: 000 Total Unts: 0013 Total GPA: 346

Degree Lvl: 2 Degree Code: 04011 Multi Major: 0

Save Return to Search Next in List Previous in List Add Update/Display

### 3.4.1 Considerations

You may update data on the above pages. Beware however that if you re-run the extract it will overlay the table and your changes will be lost. \*Warning: Any changes made to the Staging Table will not be reflected in the Database.

### 3.5 ERSD Rpt Format

#### Page Name: ERSD Extract

Specify the values on the Run Control to determine which Institution, School Code, Term, Report Code and Type to run for this process.

**Navigation:** CSU SA Baseline → CSU CO Reporting → ERS Proc → ERS Degree - Report

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	CSUC0017 ERS Degree Rpt File	CSUC0017	SQR Report	Web	PDF

### 3.5.1 Considerations

This process creates the electronic file to send to the Chancellor’s Office.

### 3.6 ERSD Supplementary Multiple Major Degree Report

The ERSD Supplementary Multiple Major Degree File is run from this Run Control. If a student has more than one Major Degree Code (\*See description above), a Supplementary Multiple Major Degree file is created for that student. The File Contains the SSN, Year, Term Code, Campus Code and Major Degree Code 1 through 9. The collection method for all of these elements is discussed in this document or the ERSA setup Guide.

#### Page Name: ERSD Sup Rpt

Specify the values on the Run Control to determine which Institution, School Code, Term, Report Code and Type to run for this process.

**Navigation:** CSU SA Baseline → CSU CO Reporting → ERS Proc → ERS Degree Sup - Report

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	CSUC0019 ERS Degree Sup Rpt	CSUC0019	SQR Report	Web	PDF

### **3.7 Running the ERSD edit process**

**Navigation:** Home → CSU SA Baseline → CSU CO Reporting → ERS Proc → ERS Degree – Edit

#### **3.7.1 Consideration**

This process runs edits against your data using the edits from ERS Data Element Dictionary. Please refer to that document for a list of edits.