



## **ERST (Credential) Setup and Process Guide v. 8.0**

**Last Revised: 10/06/03**

**DRAFT**

## REVISION CONTROL

---

**Document Title:** ERST (Credential) Enrollment Reporting System Setup and Process Guide  
**Author:** SA Functional Lead, Student Records  
**File Reference:** ERST Enrollment Reporting System Setup and Process Guide 10062003.doc

Date	By	Action	Pages
7/08/02	Kevin O'Connor	Document Creation	All
7/11/02	Kevin O'Connor	Update Document	All
7/17/02	Linda Horan	Minor formatting edits	All

## Review/Approval History

Date	By	Action	Pages
8/27/02	Perlita Miclat	Updated Setup/Processing Pages and several screen shots	6-11
10/06/03	Perlita Miclat	Update Document	All

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 Credential Report Setup Guide Summary: ..... 1
Section 2	ERST Data Elements ..... 1
2.1	Social Security Number..... 1
2.2	Year ..... 1
2.2.1	Consideration..... 1
2.2.2	Recommendation..... 1
2.3	Term Code ..... 1
2.3.1	Consideration..... 1
2.3.2	Recommendation..... 1
2.4	Campus Code ..... 1
2.5	Credential and Subject-Matter Waiver Objective Code ..... 2
2.6	Credential Emphasis ..... 2
2.7	Credential Class ..... 2
2.7.1	Considerations..... 3
2.7.2	Recommendations..... 3
2.8	Issuance Date ..... 4
2.8.1	Consideration..... 4
2.8.2	Recommendation..... 4
2.9	Competency Determination..... 5
2.9.1	Consideration..... 6
2.9.2	Recommendation..... 6
2.10	Credential Action ..... 6
2.10.1	Consideration..... 7
2.10.2	Recommendation..... 7
Section 3	Setup/Processing ERST Extract and CO Flat File ..... 8
3.1	Setup Page for Assigning Report Titles ..... 8
3.1.1	Consideration..... 8
3.2	Setup Page for ERS Report Setup..... 9
3.2.1	Considerations..... 9
3.3	Running the Extract to Staging Tables..... 10
3.3.1	Considerations..... 13
3.4	Reviewing and Updating the Staging Tables ..... 13
3.4.1	Consideration..... 14
3.4.2	Recommendation..... 14

3.5 Running the ERST Extract from Staging Table to CO Flat File ..... 14

3.5.1 Consideration..... 15

## Section 1 ERS Credential 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 ERST Data Elements

### 2.1 Social Security Number

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

### 2.2 Year

**Navigation:** [Refer to: Extracting ERST Report](#)

#### 2.2.1 Consideration

The calendar year for which the report is being made.

#### 2.2.2 Recommendation

The ERST extract will derive the Year from the "Issuance Date" supplied in the Credential Hyperlink page.

*Valid values are:* 1973 - 2050

### 2.3 Term Code

This Element is the same as ERSA – Map Term Codes.

#### 2.3.1 Consideration

A code that indicates the period for which a report is being made.

#### 2.3.2 Recommendation

The ERST extract will derived the Term from the "Issuance Date" (validate the date from Term Begin/End Date to determine the Term Code) supplied in the Credential Hyperlink page. When Issuance Date falls between terms, the logic program will look for the max TERM where the term begin date < Issuance Date (excluding winter for semester campuses).

### 2.4 Campus Code

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

## 2.5 Credential and Subject-Matter Waiver Objective Code

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

## 2.6 Credential Emphasis

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

## 2.7 Credential Class

Navigation: Manage Student Records → Track Student Careers → Use → Student Program/Plan → Student Plan → Credential Hyperlink

The screenshot shows the PEOPLE Soft web application interface. At the top, there is a navigation bar with 'Home', 'Worklist', and 'Help' buttons. Below the navigation bar, the breadcrumb trail reads: Home > Manage Student Records > Track Student Careers > Use > Student Program/Plan. A 'New Window' link is visible on the right. The main content area has several tabs: 'Student Program', 'Student Plan', 'Student Sub-Plan', 'Student Attributes', and 'Student Degrees'. The 'Student Degrees' tab is selected. The student's name is 'Kermit Frog' and the ID is '000003068'. The 'Academic Career' is 'Undergraduate' and the 'Student Career Nbr' is '0'. The 'Car Req Term' is 'Fall 2001'. Below this, there are two summary sections. The first section shows: Status: Active in Program; Effective Date: 08/01/2001; Program Action: Matriculation; Action Reason: (blank); Academic Program: UNDGR; Admit Term: Fall 2001; Effective Sequence: 2; Action Date: 10/16/2001; Requirement Term: Fall 2001. The second section shows: \*Academic Plan: BIOLOGY (with a search icon) Biology Major; \*Plan Sequence: 1; \*Declare Date: 08/01/2001 (with a calendar icon); \*Requirement Term: 2017 (with a search icon) Fall 2001; \*Advisement Status: Include; Degree: MS; Degree Checkout Stat: (blank); Student Degree Nbr: (blank) [Credentials](#) (circled); Completion Term: (blank). At the bottom, there is a toolbar with buttons for Save, Return to Search, Next in List, Previous in List, Refresh, Add, Update/Display, Include History, and Correct History.

Click the Credentials Hyperlink

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Track Student Careers > Use > Student Program/Plan

New Window

CSU Credential Data Subpanel

Credential Data View All First 1 of 1 Last

Credential Status: 2-Professional Development ERSS Reporting Row  + -

Status Date: 12/21/2001 Subject Matter Objective Code: 105

Exp Date: 12/25/2001 Credential Class: 02

Issuance Date: 12/27/2001 Credential Action: 03

Credential Emphasis: 2A Competency Determination: 1

OK Cancel

Done Internet

### 2.7.1 Considerations

This data element further identifies the term or classification of the credential for which a student has been processed. The student is assigned a credential class based on the credential he/she is being recommended for and the total number of requirements that have been met for that credential.

### 2.7.2 Recommendations

The data will be extracted from the Student Plan/Credential Hyperlink.

**Valid values are:**

- 01 = Initial 5-year Preliminary for Multiple Subject or Single Subject credential types
- 02 = Initial Clear for Multiple or Single Subject credentials recommended before September 1985
- 03 = Initial Professional Clear for Multiple or Single Subject credentials recommended after August 31, 1985
- 04 = Preliminary Service Credential
- 05 = Clear Service Credential
- 06 = Professional Clear Administrative Service
- 07 = Internship
- 08 = Upgrade to Professional Clear (fifth year requirements met) – a second document is being issued to student
- 09 = Five-year Preliminary Designated Subject
- 10 = Clear for Designated Subject credentials
- 11 = Clear for Specialist credentials
- 12 = Initial bilingual emphasis added to an existing credential
- 13 = Preliminary – Level 1
- 14 = Preliminary Clear – Level 2

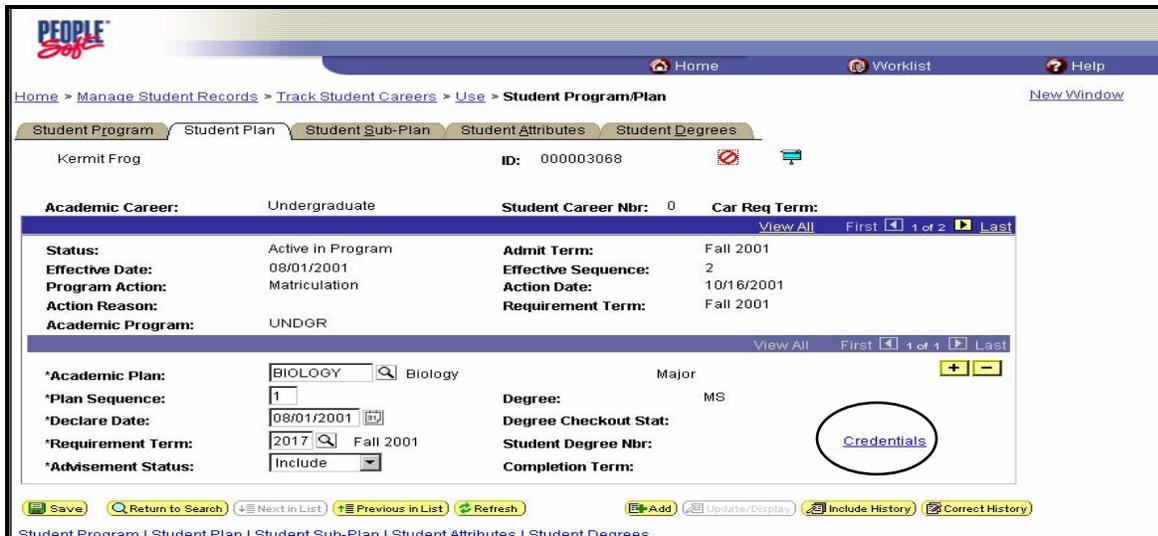
15 = Preliminary Exceptions (Preliminary 1, must teach two years within the five-year authorization period)

16 = Certificate of Eligibility (Completed program, but does not have a job)

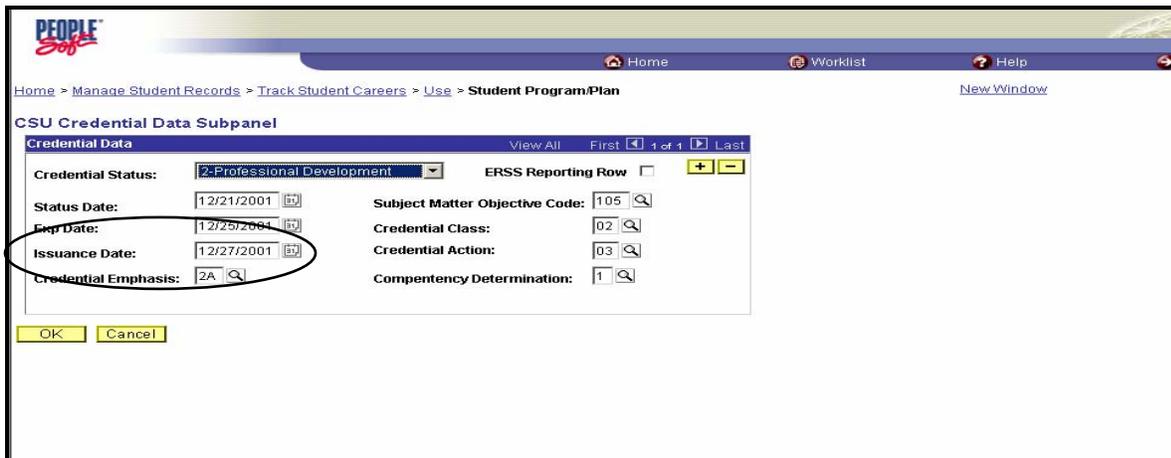
17 = Initial CLAD emphasis added to an existing credential.

## 2.8 Issuance Date

Navigation: **Manage Student Records → Track Student Careers → Use → Student Program/Plan → Student Plan → Credential Hyperlink**



Click the Credentials Hyperlink



### 2.8.1 Consideration

The issuance date entered on the credential document. This date indicates that the student has filed a credential application with a CSU credential analyst and that all credential requirements have been met.

### 2.8.2 Recommendation

The Issuance Date is used to determine the “Term Code and Year”. The logic program used the “Term Table” to assign the “Term Code and Year”. When Issuance Date falls between terms, the logic program

will look for the max TERM where the term begin date < Issuance Date (excluding winter for semester campuses).

Student can have more than one record for every credential program completed, thus earning a credential recommendation. More than one record can have the same issuance dates (i.e., completed two programs in the same term) or two different issuance dates (i.e., completed two program in different terms of the same college year).

**Valid values are:**

Eight (8) numeric characters in the format yyyymmdd

yyyy=2000 to 2099

mm=01 to 12

dd=01 to 31

## 2.9 Competency Determination

**Navigation:** [Manage Student Records](#) → [Track Student Careers](#) → [Use](#) → [Student Program/Plan](#) → [Student Plan](#) → [Credential Hyperlink](#)

PEOPLE Soft

Home Worklist Help

Home > [Manage Student Records](#) > [Track Student Careers](#) > [Use](#) > [Student Program/Plan](#) [New Window](#)

Student Program Student Plan Student Sub-Plan Student Attributes Student Degrees

Kermit Frog ID: 000003068

Academic Career: Undergraduate Student Career Nbr: 0 Car Req Term: [View All](#) First 1 of 2 Last

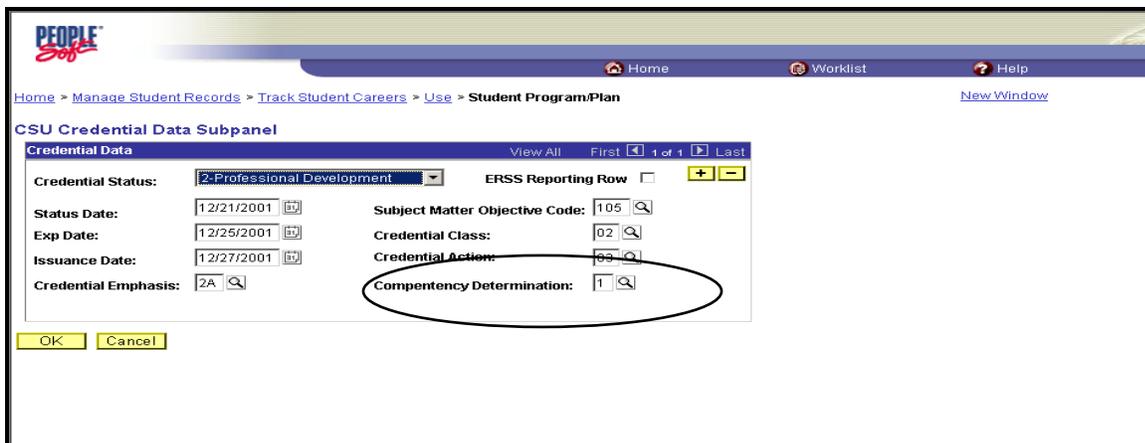
Status: Active in Program Admit Term: Fall 2001  
 Effective Date: 08/01/2001 Effective Sequence: 2  
 Program Action: Matriculation Action Date: 10/16/2001  
 Action Reason: Requirement Term: Fall 2001  
 Academic Program: UNDGR [View All](#) First 1 of 1 Last

\*Academic Plan: BIOLOGY Biology Major + -  
 \*Plan Sequence: 1 Degree: MS  
 \*Declare Date: 08/01/2001 Degree Checkout Stat:  
 \*Requirement Term: 2017 Fall 2001 Student Degree Nbr: [Credentials](#)  
 \*Advisement Status: Include Completion Term:

Save Return to Search Next in List Previous in List Refresh Add Update/Display Include History Correct History

Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees

Click the Credentials Hyperlink



### 2.9.1 Consideration

This data element indicates the method by which a student has fulfilled the statutory subject matter competency requirement for the credential

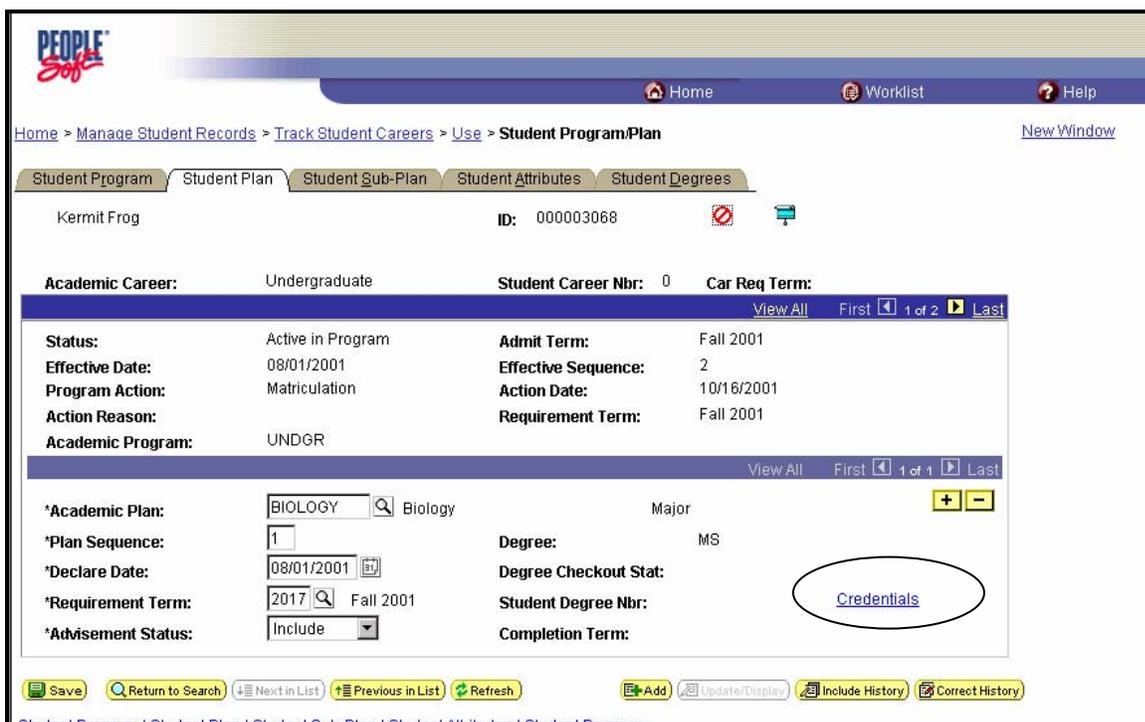
### 2.9.2 Recommendation

*Valid values are:*

- 1 = Subject Waiver Program
- 2 = Praxis Examination

### 2.10 Credential Action

**Navigation:** Manage Student Records → Track Student Careers → Use → Student Program/Plan → Student Plan → Credential Hyperlink



Click the Credentials Hyperlink

The screenshot shows the PEOPLE Soft web application interface. The breadcrumb trail is: Home > Manage Student Records > Track Student Careers > Use > Student Program/Plan. The main content area is titled "CSU Credential Data Subpanel". Below this is a "Credential Data" subpanel with a "View All" link and navigation buttons for "First", "1 of 1", and "Last". The subpanel contains several fields: "Credential Status" (dropdown menu set to "2-Professional Development"), "ERSS Reporting Row" (checkbox), "Status Date" (12/21/2001), "Exp Date" (12/25/2001), "Issuance Date" (12/27/2001), "Credential Emphasis" (2A), "Subject Matter Objective Code" (105), "Credential Class" (02), "Credential Action" (03, circled in red), and "Competency Determination" (1). At the bottom of the subpanel are "OK" and "Cancel" buttons.

### 2.10.1 Consideration

This data element specifies the type of evaluation activity performed by the credential analyst.

### 2.10.2 Recommendation

Credential Action is used to determine if “Credential Program” is completed. The logic program used this element to extract all completed “Credential Program” for a college year (July previous year through June the following year).

***Valid values are:***

01 = Evaluation performed and recommendation made for a student who has completed credential preparation program at this campus.

02 = Evaluation performed and recommendation submitted to CTC for an individual seeking a preliminary Designated Subject or Preliminary School Nurse credential. The individual may or may not be a student on campus and will have completed fewer than 6 semester units of coursework leading to the acquisition of the credential.

03 = A courtesy credential application had been submitted to CTC.

04 = Evaluation performed and submitted for an added subject authorization to an initial Single Subject credential recommendation.

05 = Evaluation performed and an application had been submitted to a dependent credential (50499)

06 = Evaluation performed and submitted as courtesy application requesting the additional of a Supplementary Authorization to an existing Multiple or Single Subject credential. Persons completing courses on the campus exclusively for the purpose of satisfying requirements for supplementary authorizations would fall into this category.

07 = Evaluation performed and recommendation made for a student who has not completed a professional preparation program at the reporting campus. This category applies to individuals who have finished out-of-state preparation programs and are currently enrolled in the CSU to complete California-specific requirement for the credential.

08 = Recommendation for an initial added subject authorization to an existing Single Subject Credential.

## Section 3 Setup/Processing ERST Extract and CO Flat File

### 3.1 Setup Page for Assigning Report Titles

Navigation: [Home](#) → [CSU SA Baseline](#) → [CSU CO Reporting](#) → [ERS Setup](#) → [Assign Report Titles](#)

PEOPLE 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 1 of 5 Last

Report Code	Type	Title
RPT4	Applicant	RPT4 APPLICANT

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

#### 3.1.1 Consideration

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

### 3.2 Setup Page for ERS Report Setup

Navigation: [Home](#) → [CSU SA Baseline](#) → [CSU CO Reporting](#) → [ERS Setup](#) → [ERS Report Setup](#)

PEOPLE Soft

Home Worklist Help Sign Out

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

ERS SetupA

School Code:	70	California State University, Northridge	Report Type:	CRED	
Academic Career:	UGRD	Report Code:	RPT6	Academic Institution:	CSUNR

Term:	<input type="text" value="2023"/>	Spring 2002	Term Type:	<input type="text"/>	GPA Summary Type:	<input type="text"/>
Trans GPA Type:	<input type="text"/>	Campus GPA:	<input type="text"/>	HS GPA Type:	<input type="text"/>	<input type="text"/>

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

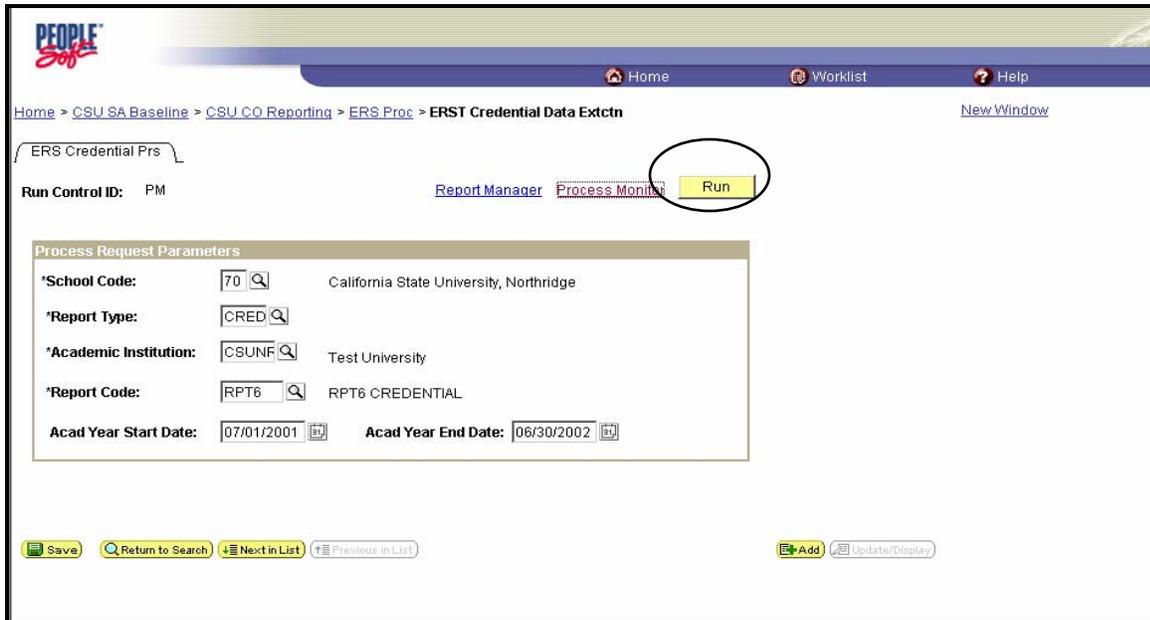
#### 3.2.1 Considerations

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, Report Type and Report Code.

*This page will be modified on a later date. Please ignore the following fields: Academic Career/Term/Term Type/GPA Summary Type/Trans GPA Type/Campus GPA/HS GPA Type – the fields are not needed for ERST.*

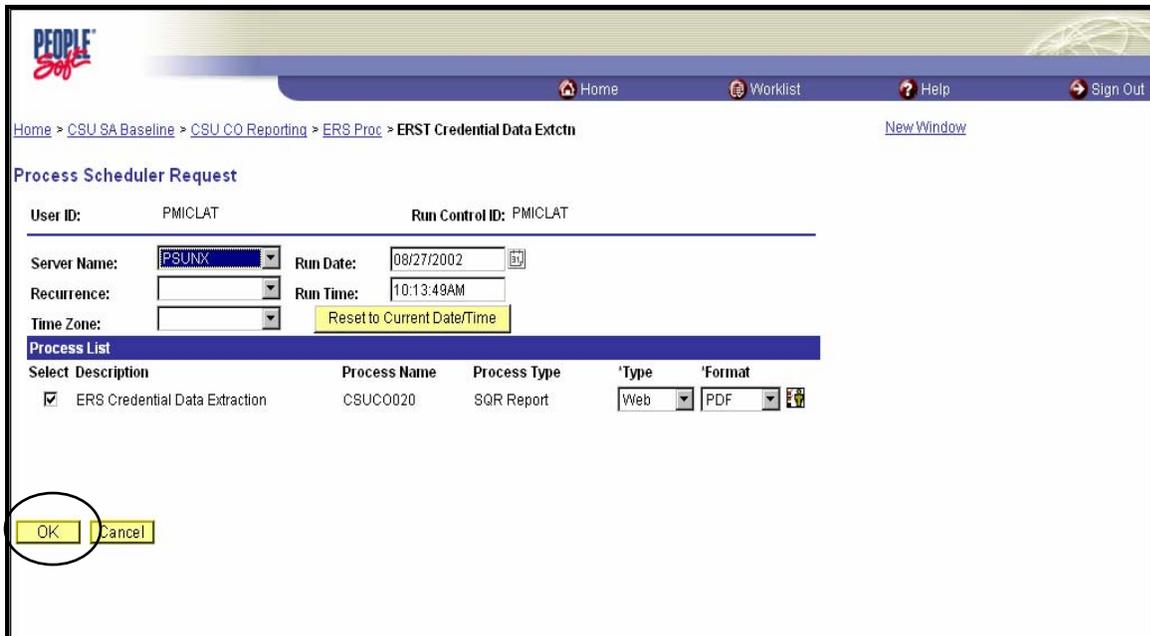
### 3.3 Running the Extract to Staging Tables

Navigation: Home → CSU SA Baseline → CSU CO Reporting → ERS Proc → ERST Credential Data Extraction



**Acad Year Start/End Date:** This is the college year you wish to run the extract.

Click on the “Run” button to initiate the process.



**Server Name:** Select “PSUNIX” (if you running UNIX)

**Type:** Select “WEB”

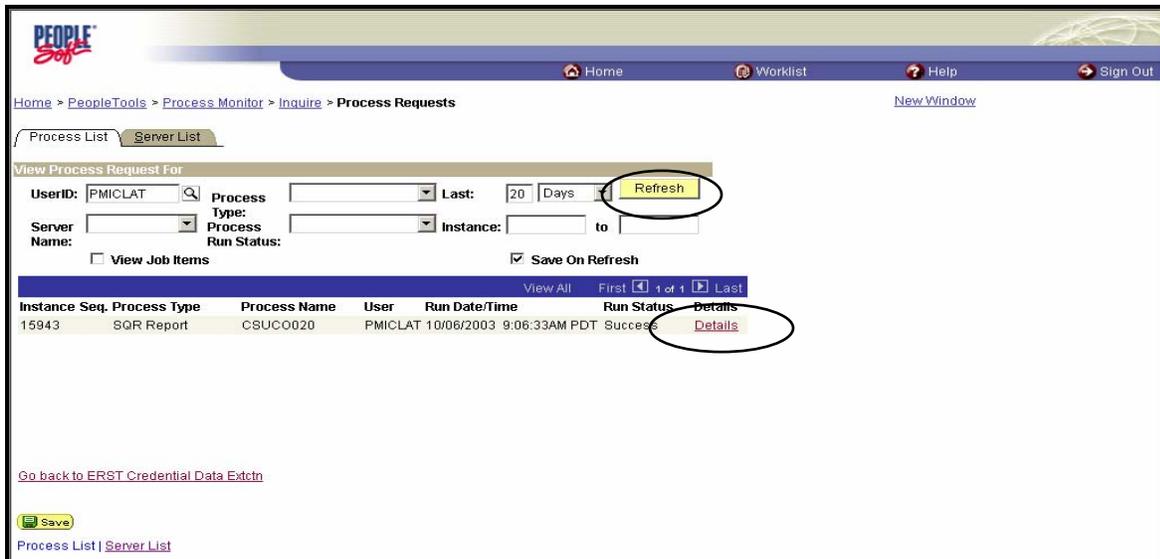
**Format:** Select “PDF”

Click on “OK” button

After clicking on the “OK” button, below screen shot is to verify the “Run Status” by clicking on the “Process Monitor”



Below screen shot is to verify if the “Run Status” is completed. If “Run Status” is not completed (Success), you can click on the “Refresh” button to update the processing status. Once the Run Status is “Success” you can click on the “Details” button to verify “View Log Trace”. Make sure you select the correct “Process Name”. CSUCO020 – Extract and CSUCO022 – CO Flat File.



Click on the “View Log/Trace” button to open the trace file.

PEOPLE Soft  
Home Worklist Help  
New Window

Home > PeopleTools > Process Monitor > Inquire > Process Requests

**Process Detail**

Process

Instance: 15943      Type: SQR Report  
Name: CSUCO020      Description: ERS Credential Data Extraction

Run      Update Process

Run Control ID: PM       Hold Request  
Location: Server       Queue Request  
Server: PSUNX       Cancel Request  
Recurrence:       **Delete Request**  
    Restart Request

Date/Time      Actions

Request Created On: 10/06/2003 9:08:26AM PDT      Parameters      Transfer  
Run Anytime After: 10/06/2003 9:06:33AM PDT      Message Log  
Began Process At: 10/06/2003 9:08:42AM PDT      Batch Timings  
Ended Process At: 10/06/2003 9:09:02AM PDT      **View Log/Trace**

OK      Cancel

Click on the “Trace File” to verify how many records got extracted. This is also the way to verify if your SQR’s program got error messages.

PEOPLE Soft      Report/Log Viewer

Instance: 15943      Type: SQR Report  
Name: CSUCO020      Run Cntl ID: PM  
Status: Success      Submitted By: PMICLAT  
Server: PSUNX      Recurrence:

ERS Credential Data Extraction

Name	Size	CreationDate
<a href="#">Message Log</a>	1397 bytes	2003-10-06 09:08:42
<b><a href="#">Trace File</a></b>	217 bytes	2003-10-06 09:08:42

The program extracted 8 records. If there is an error on the SQR, the error messages will be displayed.

```

Program Began /sa81906_999/h8cmstat/CSUsa8/sqr/csuco020.sqr 06-OCT-2003 09:08:42_AM
Program Began /sa81906_999/h8cmstat/CSUsa8/sqr/csuco020.sqr 06-OCT-2003 09:08:42_AM
Number Of Credentials Records Processed      8
    
```

### 3.3.1 Considerations

This process extracts all the fields from PeopleSoft tables that make up the ERST - Credential report.

### 3.4 Reviewing and Updating the Staging Tables

**Navigation:** [Home](#) → [CSU SA Baseline](#) → [CSU CO Reporting](#) → [Use](#) → [ERST Credential Stage](#)

The data that was extracted for each student is accessible in the ERST - Credential Staging Table.

PEOPLE  
Soft

Home Worklist Help

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

ERST Credential Stage

**Find an Existing Value**

Search By: Run Control ID

Run Control ID: PM

Case Sensitive

[Search](#) [Advanced Search](#)

You can Search by: Run Control ID/CSU CO School Code/Report Code/User ID/EMPLID/SSN.

If your records or file has big volume (i.e 15k plus), use search only by EMPLID or SSN. If you use Run Control ID, User ID, and Report Code the file might not be open for you to access.

#### SEARCH BY EMPLID

PEOPLE  
Soft

Home Worklist Help

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

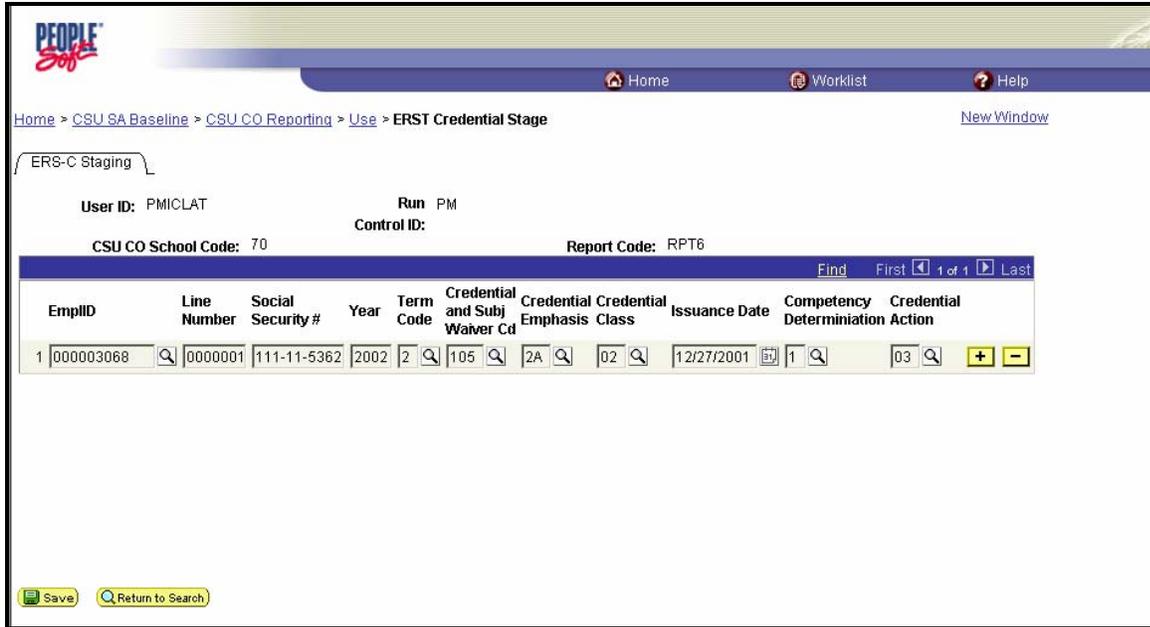
ERST Credential Stage

**Find an Existing Value**

Search By: EmplID

EmplID: 00003068

[Search](#) [Advanced Search](#)



### 3.4.1 Consideration

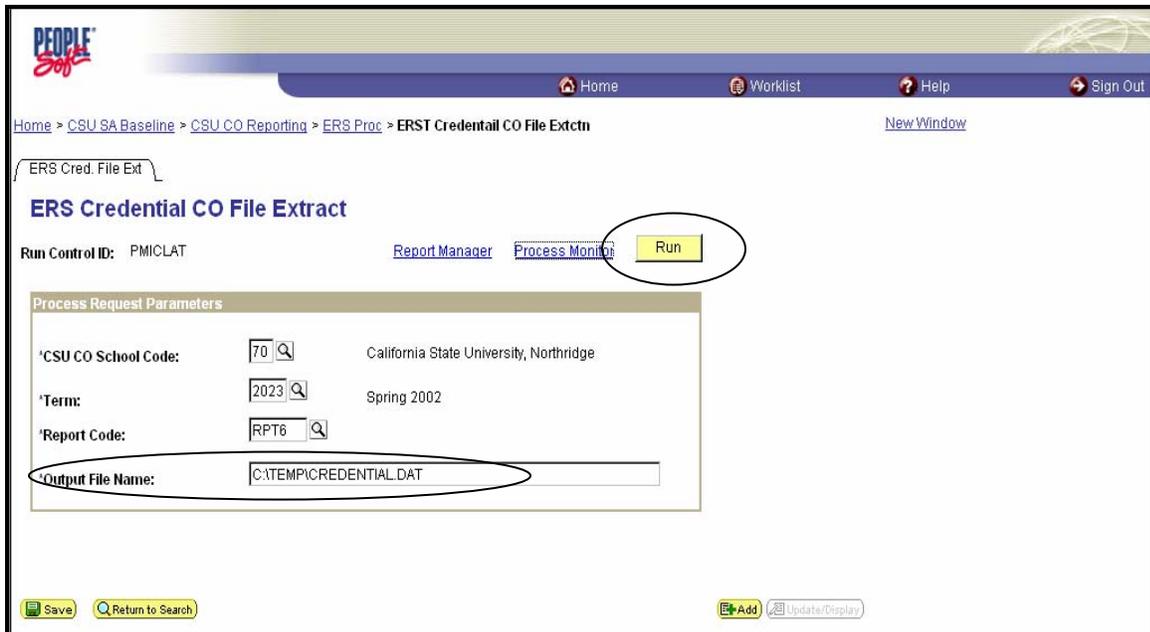
You may update data on the above pages. Beware however that if you re-run the extract it will overlay the table and your changes will be lost. **Warning:** Any changes made to the Staging Table will not be reflected in the Database.

### 3.4.2 Recommendation

Correct the student data and re-run the extract, this way the data is permanently fixed.

### 3.5 Running the ERST Extract from Staging Table to CO Flat File

**Navigation:** Home → CSU SA Baseline → CSU CO Reporting → ERS Proc → ERST Credential CO File Extraction



Make sure you filled-in the “Output File Name” before running the process. You may ask your technical team how your output file name should be for you to able to see the detail data. This is depend on your access and configuration on your system.

Click on the “Run” button to initiate the process.

The screenshot shows a web-based interface for scheduling a process. The breadcrumb trail is: Home > CSU SA Baseline > CSU CO Reporting > ERS Proc > ERST Credential CO File Extctn. The page title is "Process Scheduler Request".

Fields in the dialog:

- User ID: PMICLAT
- Run Control ID: PMICLAT
- Server Name: PSUNIX (dropdown)
- Run Date: 08/27/2002 (calendar icon)
- Recurrence: (dropdown)
- Run Time: 10:28:02AM
- Time Zone: (dropdown)
- Reset to Current Date/Time (button)

Process List Table:

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	ERS Credential CO File Extract	CSUCO022	SQR Report	Web	PDF

Buttons: OK, Cancel

**Server Name:** Select “PSUNIX” (if you running UNIX)

**Type:** Select “WEB”

**Format:** Select “PDF”

Click on “OK” button

Please refer to “3.3 Running the Extract to Staging Tables” for the rest of the steps.

### 3.5.1 Consideration

This process creates the electronic file (CO Flat File) to send to the Chancellor’s Office to run “CO Edits” to verify if each “Elements” value comply with the DED (Data Element Edit) validation. This process can be run many times until the campus data edits are clean.

**Note:** Every time you make student data correction, you need to re-run the “Extract” program again before re-running the “CO Flat File” program.