OPUS Staff Training Manual
Unofficial Transcript and Batch Transcript Process

Records Tab Layout

Depending on the users role, the Records Tab will include page links to the most frequently used student records pages. The page may also include important notices from the Office of the Registrar, and currently, an Instructional Center with videos and documentation for various student records operations.

Academics Folder

OPUS links live within folders on the Records tab. The folder contents are grouped so that users may find related functions easily. Let's start at the top right side of the page and begin with the Academics folder.

Academics

View Student Academic Summary
View Unofficial Transcript
Produce Batch Transcripts
Student Grades
Enrollment History
Enrollment History No GPA
Undergraduate GER Queries
Update Expected Grad Date
Update Student Advisor

Click on the View Unofficial Transcript link to view or print a student's unofficial transcript located in the Academics folder on the Records Tab in OPUS

Transcript Request Search Page

Always click on **Add a New Value**. *(Do NOT USE - Find an Existing Value)*

View Unofficial Transcript
Request Header Page

➢ In Transcript Type, select INTRN by using the down arrow. This is the preferred choice for a quick look at the student's transcript.

Depending on the user's OPUS access, choices may include
  • INTRN (basic advising transcript)
  • ADV (degree audit transcript for particular school)
  • TREVL (transfer credit evaluation transcript)

➢ Choose Printer for the Output Destination.

➢ Future Release – choose Immediate Processing

View Unofficial Transcript
Request Detail Tab

> ➤ Enter the student's emplID and the number of copies requested, if other than 1. If you don't know the student's emplID, click on the magnifying glass 🔍 in the ID field to search for the student.

> ➤ If you need to add an additional request for a different student, click on ➕ to add another row. Enter the additional student's emplID. Continuing adding rows with the ➕ until all student emplIDs have been entered for this request.

> ➤ Do not use SEND as this feature is not operational.

> ➤ Results can be printed or saved as a PDF after processing.

View Unofficial Transcript
Completed Request Detail Page

➢ After all students for this request have been entered, click on PROCESS REQUEST at the top of the page. When the request is processed, the Report Results page is displayed with the requested transcript(s).

If requested only one student's transcript, you may print the results from this page. If you choose your browser print button to print, the results will be multiple pages and the format may not be attractive. If you choose the PRINT and Report Manager options on this page, the results will produce a PDF report that looks much nicer. Instruction for using this feature follows on the next page.

If you requested more than one student's transcripts, they will be stacked behind the 1st. Look at the dark blue line under the tabs. By clicking ▣ you can scroll through to each student's transcript result.

If you requested only one student's transcript, you can print from the Report Results page. Click on PRINT. In the far right corner of the page SAVED briefly displays. When SAVED disappears, click the REPORT MANAGER link. A new screen will appear. Click REFRESH until the process line changes the status from initiated to POSTED. Notice that the POSTED line has a link appear under the **"Description"** heading. Click this link to open the transcript and print.

If you ordered more than one transcript, click the link "**go back to transcript request**." From the Report Results page, you can scroll to the next student's transcript by clicking the ▶ on the dark blue line and process that transcript using the PRINT and REPORT MANAGER process. However, if you want to print ALL transcripts at once, return to the second tab by clicking the Request Details tab at the top of the page.

To print **ALL** requests at once, click on PRINT on the Request Details page. The image will not change. SAVED will appear briefly in the top right of the page. When SAVED disappears, click the REPORT MANAGER link on this page. The process page will appear. Click REFRESH until the process line changes the status from initiated to POSTED. Notice that the POSTED line has a link appear under the **"Description"** heading. Click this link to open the transcript and all transcripts will be listed in one PDF ready for printing.

The transcript can be printed from the browser directly from the Report Results page, but by using the PRINT and REPORT MANAGER features, the user will have a compact easy to read PDF document that is easier to work with.

X to close all windows or click HOME to begin your next OPUS adventure.

Produce Batch Transcripts
Imagine the Process

Transcripts can be produced in a group or batch. As you prepare to create a batch of transcripts, it helps to have a mental picture of the batch process. There are three steps involved in creating batch transcripts. To be successful, all steps must be followed in this order.

Step 1 - choose the students – *Transcript Request*

Step 2 - construct the transcripts – *Transcript Generation*

Step 3 - print the transcripts – *Internal Transcript Print*

Produce Batch Transcripts
Getting Started

Go to the Records Tab and the Academics folder click the link for Produce Batch Transcripts.

A new screen appears to guide you through the process.

Notice that there are two methods listed on this link to Print a Batch. *This document will only cover the "Internal Transcript Batch Print" option. Batch printing for advisement documents would be located under "Degree Audit" documentation.*

Click link 1. Request a Batch.

If this is the first time is being created, the user should set-up a Run Control ID for the first phase. Click Add a New Value. Naming the run control **"transcript_request"** is recommended. **Hint -** blank spaces are not allowed in run control names, please use underscore for blank spaces.

After the first run through for batch transcripts, the user can easily find and reuse the assigned run control by clicking Find an Existing Value and SEARCH or by entering the name "**transcript_request**" and SEARCH.

Transcript requests can be made using one of the following criteria.

❖ Academic Level
❖ Advisor
❖ Career/Program/Plan
❖ Student Group

Institution - Defaults to Emory.
Transcript Type - Choose or enter INTRN – Advising Document
Transcript Request Criteria – Career/Program/Plan
Career – Choose the appropriate career (i.e. GSAS, UCOL, GNUR, etc.)
Acad Program – Choose the appropriate program (i.e. PhD, LIBAS, BSN, etc.)
Acad Plan – Choose the appropriate plan or plans (i.e. ECONPhD, ECONBA, CHEMBS, etc.)

Click ➕ to choose more than one transcript group.

Produce Batch Transcripts
Other Criteria Options

Besides Career/Program/Plan criteria, there are other population choices available. Required fields for each criteria selection will differ.

Transcript by Academic Level

Transcript by Advisor ID

Transcript by Student Group

Produce Batch Transcripts
Processing the Request

If more than one group or population of transcripts is requested, click the ➕ icon to add another row of criteria. Once all transcript request groups have been entered, click SAVE.

In the illustration below, the request is for students who have declared ECONBA as their priority major, students who have declared ECONND & BUSECON as their second major, and students who have declared ECONMIN as their minor. Notice that the career is different to capture the BUSECON group.

After the criteria is set, click the RUN button at top of page.

The Process Scheduler appears. If these are not already entered, Type = Web and Format = PDF. If everything looks good, click OK or you can click cancel to void the process.

Clicking OK returns the user back to the Batch Transcript Request page. Click Process Monitor to monitor this process.

Click REFRESH often to monitor process status changes. When the run status updates to SUCCESS and the distribution status updates to POSTED, a link will appear under the DETAILS column. Click the DETAILS link. (**Note:** the most recently generated process will appear at the top of the list that is displayed. This is the one you want to monitor. It may take a moment for you to see a new row appear for a newly requested process. Don't panic, the process will appear. **Hint:** To avoid confusion, the user should set the LAST data to 1 DAY. The user can also change this to smaller increments of time for easier monitoring.)
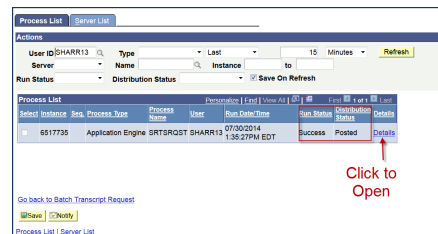
When the DETAILS link is clicked, a Process Detail page appears. Click the MESSAGE LOG link.
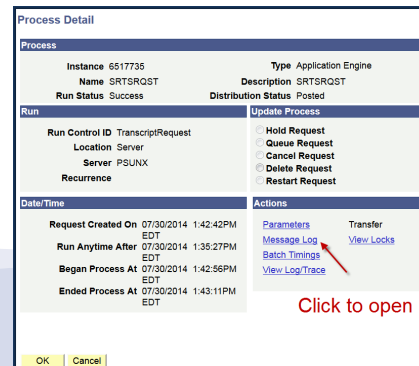
The Message Log contains the emplids of all the students selected for this request. If necessary, use the scroll bar to see the full listing of student IDs. For our example there are 164 empids.

Important: Each group within the request will be assigned a process number. *Remember our request asked for students with the following majors - ECONBA, ECONND, BUSECON, and ECONMIN. There will be four process codes (one for each the groups requested). The user only needs the first and last process code to continue with the transcript generation process.* Locate the first process number (you may see this on the first page, but it could also be on subsequent page – you must scroll down to find the number). **Note:** this process code is not the 1st emplid in the list. The process code will look like this.

Once located, write down the first process number.

Scroll to the end of the list and the last process code will be located near the end of the list.

Hint: Two numbers 002288208 and 002288211 = range for 4 groups

The next process is similar to going to the file cabinet and pulling records. This process may take a little more time than the transcript request took. Close all windows and from the Records Tab, click on the Process Batch Transcript link again.

Click link 2. Generate a Batch.

If this is the user's first time creating a batch, they should set-up a Run Control ID for the second phase. Click Add a New Value. Naming the run control "**transcript_generate**" is recommended. **Hint -** blank spaces are not allowed in run control names, please use underscore for blank spaces.

After the first run through for batch transcripts, the user can easily find and reuse the assigned run control by clicking Find an Existing Value and SEARCH or by entering the name "**transcript_generate**" and SEARCH.

When the Transcript Generation page appears, the following information needs to be entered.

Institution = Emory
Transcript Type = INTRN

Under Selection Criteria

- Check the box next to Request Nbr and enter the two numbers that were written down from the previous process. From will be the first number (i.e. 002288208 and tab) and To will be the last number (i.e. 002288211 – when you tab the first number will automatically populate. If you had requested more than one group, you will have a process group range. Enter the last number in the range). After entering the numbers SAVE.

- Then click the RUN button at the top of the page.

The Process Scheduler appears. If everything looks good, click OK or you can click cancel to void the process.

Clicking OK returns the user back to the Transcript Generation page. Click Process Monitor to monitor the process.

Produce Batch Transcripts
Process Monitor & Details Pages

Click REFRESH often to monitor process status changes. When the run status updates to SUCCESS and the distribution status updates to POSTED, a link will appear under the DETAILS column. Click the DETAILS link. (This process may take longer than the previous process because the system is building the transcripts for printing. Don't panic. The length of time it takes depends on the number of transcript in each grouping.)

The Process Detail page appears. Click the MESSAGE LOG link.

Viewing the Message Log for this phase is optional. By clicking the Message Log link, you will now see names appear with the student id number. This can be skipped and the user can move forward to the printing phase.

The next process is similar to going to a printer with file folders and printing the records. Close all windows and from the Records Tab, Process Batch Transcripts link, click the link Print a Batch – Internal Transcript Batch Print.

Click link 3. Print a Batch – Internal Transcript Batch Print.

Internal Transcript Batch Prnt

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

Run Control ID: transcript_print

Add

Internal Transcript Batch Prnt

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

Find an Existing Value | Add a New Value

▼ Search Criteria

Run Control ID: begins with ▾ transcript_print

☐ Case Sensitive

Search | Clear | Basic Search | 🔲 Save Search Criteria

Search Results

View All First ◄ 1-2 of 2 ► Last

Run Control ID	Language Code
Transcript_Print	English
transcript_print	English

When printing a batch for the first time, the user should set-up a Run Control ID for the second phase. Click Add a New Value. Naming the run control "**transcript_print**" is recommended. **Hint -** blank spaces are not allowed in run control names, please use underscore for blank spaces.

After the first run through for batch transcripts, the user can easily find and reuse the assigned run control by clicking Find an Existing Value and SEARCH or by entering the name "**transcript_print**" and SEARCH.

A new page will appear. Again the user will enter the request number range that was generated in the transcript request phase. The user will enter the first number in the From and last number in the To fields and SAVE.

Then click RUN.

The Process Scheduler appears. Type = Web and Format = PDF and if everything looks good, click OK or you can click cancel to void the process.

Clicking OK returns the user back to the Internal Trans Prt page. Click Process Monitor to monitor the process.

Produce Batch Transcripts
Process Monitor & Details Pages

Click REFRESH often to monitor process status changes. When the run status updates to SUCCESS and the distribution status updates to POSTED, a link will appear under the DETAILS column. Click the DETAILS link.

The Process Detail page appears. Click the View Log/Trace link.

A new page will appear. In the middle of the page under FILE LIST is a PDF file.

Double click this link to open the PDF file containing the transcript(s) ready for printing to your local printer.