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STUDENT SELF-SERVICE

FACULTY SELF-SERVICE

EMPLOYEE SELF-SERVICE

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DISCUSSION

EXERCISE D.1: PRINT A PHASE REPORT
Course Objectives

This course is intended for faculty, staff, and student employees who will be first-time users of PeopleSoft Campus Solutions (CS). Frequently-used data and procedures are reviewed.

At the end of this course, you will be able to:
- Apply for security to access PeopleSoft CS data
- Define common terms used in PeopleSoft CS
- Explain your responsibilities in enforcing FERPA regulations
- Sign in and sign out
- Navigate
- Search for, locate, and review student records
- Explain effective dating
- Run a query
- Change your password
- Obtain help with PeopleSoft password and security issues
- Clear browser cache
- Locate The University of Akron’s PeopleSoft documentation and online courses
- Understand what is available in the student, faculty, and employee self-service applications
- Follow written instructions to print a student’s schedule
- Follow written instructions to print an unofficial transcript
- Follow written instructions to print a Phase Report (Schedule of Classes)
Lesson 1: Obtain Access to PeopleSoft CS Records

A PeopleSoft User ID and password are required to log in to PeopleSoft. To apply for security to use PeopleSoft or to change your PeopleSoft security, please complete the online form at https://footprints.uakron.edu/secure/ps.

This form must be completed by:

- A new employee who will be accessing PeopleSoft for the first time
- A current employee who needs additional access
- An employee who has transferred to a new department
- A supervisor to remove access for an employee who has transferred to another department or who has left the University

If you cannot remember your PeopleSoft ID or password or wish to speak with someone directly about the granting or changing of security, please contact the Support Desk at x6888 (330.972.6888) for assistance.

**Note:** Your security will determine what information will be available to you.

If you transfer to a new department and still need PeopleSoft access, you will need to obtain a new password and possibly a new User ID. Your security does not transfer to the new department with you.

1. To apply for your User ID and password, go to the security form at: https://footprints.uakron.edu/secure/ps.

   The fields with an asterisk must be completed.

   If training is required for the access you need, it is recommended that you complete the necessary training **before** requesting the access to that data.
2. After you complete the form, click on the Submit Request button. 
   **Note:** If one of the required fields is not completed, you will be unable to Submit your request.

3. The security form is forwarded to your Department Chair/Director and to your Supervisor for approval of your request.

4. The security form is forwarded to Software Training to verify that any necessary training has been completed.

5. The security form is forwarded to the appropriate business offices (Registrar, Admissions, Student Financials). That business office must approve your request.

6. After your security has been approved, the security administrator will send you an email to notify you that your ID and password are assigned and to contact the Support Desk at 330.972.6888 to receive your password.
Lesson 2: Student Privacy - FERPA

Discussion

As an employee of The University, you may be granted broad access to student data in PeopleSoft. It is crucial to remember that federal legislation and University policy protect the student’s right to privacy. There are restrictions on what information you can release about a student and to whom this information may be released.

The purpose of FERPA, the Family Educational Rights and Privacy Act of 1974, is to afford certain rights to students concerning their education records. At The University of Akron, the FERPA coordinator is in the Office of the Vice President, Student Affairs. Any questions or problems related to this policy should be directed to the FERPA coordinator.

University Policy and Training

For information regarding FERPA and University policies:


2. Review the FERPA materials and/or take the online course.
   b. Log in with your UAnet ID and password.
   c. Click on the Faculty/Staff tab.
   d. In the Compliance Training area, click on a link to take the online FERPA tutorial and/or to review the handouts.

3. Contact the Office of the Registrar at registrar@uakron.edu.
Directory Information

One area of the FERPA laws concerns directory information. Directory information includes the student’s name, telephone number, mailing address, major field of study, extracurricular participation, achievement and academic awards or honors, weight and height of members of athletic teams, photographs, years of attendance and terms enrolled.

Directory information may be released unless a student specifically requests that it not be released. This request to not release directory information can be made by the student through self-service on the My Experience page in My Akron. If a student has restricted the release of directory information, the FERPA window shade icon will display on most of the PeopleSoft pages that display directory information. You may check the student’s FERPA restrictions on the FERPA inquiry page at the following path:

Campus Community> Personal Information> Biographical > Person FERPA> FERPA

Although a student may allow the release of directory information, it is University policy that you may not release directory information unless it is part of your job. For further information, review The University’s policy at http://www.uakron.edu/ogc/UniversityRules/pdf/11-08.pdf.
Lesson 3: Sign In and Sign Out of PeopleSoft CS

1. Open the Internet Explorer.

2. If this is the first time that you are logging in, type the URL in the Address Bar and note it here.

   URL _______________________________________

3. Read the FERPA reminder.

   FERPA Reminder For System Users
   What is FERPA? The Family Educational Rights and Privacy Act of 1974, as amended, provides considerable protection to our students and their records, and legal sanctions against us if we do not comply. Therefore, it is necessary to understand our responsibilities when accessing student information. The Office of General Counsel maintains a complete copy of our FERPA Policy.

   Recognizing the responsibility to maintain the confidentiality of all records,
   - I will access student and employee records only as required to perform assigned duties.
   - I will store information under secure conditions and make every effort to ensure the individual’s privacy.
   - I will not release suppressed or private information without proper authorization and I will not publicly discuss a record in a way that might personally identify that student or employee.
   - Unless release of public information is regarded as part of my job, I will notify the Registrar’s office immediately to any request I receive for public records.
   - I will not release any information if the student has a FERPA restriction on himself/herself [identifiable by the icon].
   - If the student does not have a FERPA restriction, I will release only information regarded as directory information.

   I understand that violations of security and confidentiality may result in serious disciplinary actions. Clicking the “Login / Accept FERPA” button below indicates acceptance of the terms of this agreement.

   ![Login / Accept FERPA button]

4. To sign in, enter your PeopleSoft **User ID** and **Password**.

   The User ID and password are case sensitive.

   If you do not have a PeopleSoft User ID, refer to the instructions in Lesson 1.

5. Click on the **Login/Accept FERPA** button or press the **Enter** key.

   The Home Page displays a list of menu items to which you have access.
6. **DO NOT PERFORM THIS STEP UNTIL YOU ARE READY TO EXIT PEOPLESOFT.**

To sign out of PeopleSoft, click on the **Sign out** link in the top right corner of the PeopleSoft page (Navigation Header).

7. **When the PeopleSoft Sign In page displays, as shown in step 3, you are signed out of PeopleSoft.**

**Note:** You need to sign out of PeopleSoft using the **Sign out** link. Do not close the browser until you sign out and see the Sign In web page. If you do not sign out, your PeopleSoft session remains open until your session times out.

If there is no activity in PeopleSoft after 60 minutes, you will be logged out. This is known as “Timing Out.”
Lesson 4: Navigation

Discussion

PeopleSoft allows you to navigate to the record(s) that are needed by using one of these methods:

- Menu and Navigation Page
- Navigation Header
- Breadcrumbs
- Menu Search Box
- Favorites

The Campus Community menu is used to access basic information about the people (students and employees), whose data is stored in PeopleSoft. This basic information includes, but is not limited to, addresses, phone numbers, emergency contacts, FERPA restrictions (students), and athletic participation (students).

In the following exercises, you need to check the FERPA restrictions for a student to determine whether or not you are allowed to release the student’s directory information.

In PeopleSoft, the menu selections that lead to the search page for the data are referred to as the path. The path for FERPA records is:

**Campus Community > Personal Information > Biographical > Person FERPA > FERPA**
Exercise 4.1: Use the Menu, Navigation Header and Breadcrumbs

1. Use the Menu and click on the words Campus Community.

The Navigation Page displays the menu options in a graphical manner.

2. In the Navigation Page, click on each of the links for:
   - Personal Information
   - Biographical
3. As selections are made, a **breadcrumb** trail displays at the top of the Navigation pane.

   To move back in the menu to a previous menu selection, click on a breadcrumb.

   ![Breadcrumb Trail]

4. Click on the **FERPA** link.

   ![Person FERPA]

   The FERPA search page displays.

   ![FERPA Search Page]

5. Click on the **Home** link in the Navigation Header to return to the Home Page.

   ![Home Link]
Exercise 4.2: Use the Menu Search Box

If the navigation path is not known, there is a search option available for locating a particular page in PeopleSoft. This search option will allow you to type key words in the search box and return a list of possible matches.

This Search box only searches the words in the menu items to locate a menu option. The search does not search any field names or data.

1. At the top of the main menu, there is a Search box.

2. In the Search box, type a keyword for the page to locate.
   In class, enter FERPA.

3. Click on the Start your Search button.
   The search results display with a description of each option.

4. Review the search results. Select one of these options.
   - To navigate to a page, click on that page’s link under Search Results.
   - To conduct a new search, enter new keywords in the search box and click on the Find button.
   - To return to the PeopleSoft Home Page, click on the Home link in the Navigation Header.
5. In class, select the first **FERPA** option from the search results list.

The FERPA search page displays.

**FERPA**

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

- **Find an Existing Value**

**Search Criteria**

- **Id:** begins with ▼
- **Campus ID:** begins with ▼
- **National ID:** begins with ▼
- **Last Name:** begins with ▼
- **First Name:** begins with ▼

[Search] [Clear] [Basic Search] [Save Search Criteria]
Exercise 4.3: Favorites

Discussion

You have the option to set favorites in the Internet Explorer, but the favorites only will be available on the computer at which the favorite was created. Browser favorites are stored on the particular computer on which the favorite was created.

It is preferable to create your PeopleSoft favorites within PeopleSoft. These favorites are available at any computer at which you sign in, because the favorites are stored in the PeopleSoft database.

 Favorites are created on search pages.

Part A: Create a Favorite

1. Navigate to the page to be set as a favorite.

   In class, create a favorite for the FERPA search page.

   Path: Campus Community > Personal Information > Biographical > Personal FERPA > FERPA

2. Click on the link for Add to Favorites in the Navigational Header. This box displays.
3. A default name is given for the favorite. This can be changed.

   To change the name of the favorite, click to place the cursor in the **Description** field and type a new name.

   In class, enter FERPA and then your initials, for example: FERPApkr. Click on OK.

4. A message displays to indicate that the favorite is saved.
   Click on OK to accept the message.
Part B: Use a Favorite

Once a favorite is created, use the My Favorites menu to navigate quickly to the page that is needed.

1. If necessary, click on the Home link in the Navigation Header.

2. In the Navigation Menu, click on My Favorites.

3. Click on the link for the favorite to which you want to navigate.

   In class, click on the link for the favorite that you created, FERPA (Initials).

   The FERPA search page displays.

   Note: PeopleSoft remembers the last student’s or employee’s ID for which you searched in this session. This is an option called Carry ID, which is set by default in PeopleSoft.
Part C: Edit Favorites

After favorites are created, you can:

- Rename favorites
- Delete favorites
- Change the order in which the favorites appear in the My Favorites menu option

1. Click on the Home link in the Navigation Header.

   ![Home Link](image)

   **Note:** It is not necessary to return to the Home page in order to make a selection from the menu, although this step is done as a part of this exercise. You may select from the menu at any time.

2. In the menu, select My Favorites > Edit Favorites.
   The Edit Favorites page displays.

   ![Edit Favorites](image)

3. To rename the favorite, use the Favorite column.

   To change the order of the favorites, use the Sequence number column.

   To delete the favorite, click on the Delete button in the row of the unwanted favorite.

   **Note:** If more than one favorite has the same sequence number, those favorites are grouped and display in alphabetical order within the group.

4. If any changes are made, click on Save.

5. Click on the Home link in the Navigation Header to return to the home page.
# Exercise 4.4: Navigation Tips

1. When working in PeopleSoft, it is not recommended that you use the browser’s Back and Forward toolbar buttons. If you use these buttons, you may lose the data that you are entering or you may “back-out” of PeopleSoft. Instead, use the links, buttons, and menus on the PeopleSoft pages to move back and forward through the pages.

2. To move back a page in PeopleSoft, scroll to the bottom of the page to locate a button or link. The following buttons or links may be available to move back to the previously viewed page.
   - OK
   - Cancel
   - Return

3. See the two handouts with the menu paths for frequently-used data for Student Records and for Human Resources. These handouts will help you to quickly locate the data that you need.
Lesson 5: Use Inquiry Search Pages and Read Data

Discussion

After the last menu selection in a path is made, a search page displays. There are two types of search pages, inquiry and report (process). The inquiry search page is reviewed here.

The FERPA search page is an example of an inquiry search page. On an inquiry search page, enter the criteria for the records to review.

![Search Criteria](image)

In Appendix D: Print a Phase Report, you will work with a search page for a report. A report’s search page asks for a Run Control ID.
Exercise 5.1: Use an Inquiry Search Page to Locate a Record

Student Directory Information

1. Navigate to the desired page.
   In class, navigate to the FERPA search page using your Favorite.

2. Enter criteria to locate the student’s FERPA information.
   In the ID field, enter the student’s ID number.
   If the ID is not available, search by name, as shown in step 3.

   Note: Whenever possible, use the ID (also called EmplID) to locate an individual.
   The ID or EmplID is a unique value assigned to individuals in the PeopleSoft system. This ID or EmplID is printed on the back of each person’s Zip Card. Example: 1229982

3. A search can be done by name.
   - In the Last Name field, enter the person’s last name or a partial last name.
     A search may be performed without a complete last name in this field. However, the fewer letters entered the larger the search results will be.
   - In the First Name field, enter the person’s first name.
     A search may be performed without using the entire first name.
     In this example, enter Student for the Last Name and J for the First Name.
4. When performing a search, a variety of **Operators** are available to modify the search. For example, in the Last Name field, click on the down arrow to change how PeopleSoft looks for results.

   ![Last Name Field](image)

   These are the operators available for the Last Name field:

   - begins with
   - contains
   - =
   - !=
   - <
   - <=
   - >
   - >=
   - between
   - in

   **Example:** Use the **contains** operator, when you know a part of the student’s last name, but that part may not be the beginning of the name. You may know one part of a student’s hyphenated last name.

5. Note that search results are limited to 300 rows.
6. Click on the **Search** button to perform the search.

   One of two events occurs:
   - If more than one record matches your search criteria, the search results display at the bottom of the search page.
   - If only one record matches your search criteria, the transactional (data) page displays.

**Note:** The **National ID** (Social Security Number) field is not displayed on Human Resource search pages.

For most campus users, the data in the National ID field is masked in the Search Results, so only the last 4 digits display.

If your security allows you to see Social Security Numbers, you may view that data on the transactional (data) pages.

7. Use the **View Tools** to navigate through search results.
   Sort the search results by clicking on any column header.

8. Click on any link in the row for the record to open.
   In this example, click on any link in the row for ID 1229982.

---

**Table:**

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Campus ID</th>
<th>National ID</th>
<th>National ID Country</th>
<th>National ID Country Short Description</th>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1839843</td>
<td>Student_Jimmy</td>
<td>Unknown</td>
<td>(blank)</td>
<td>(blank)</td>
<td>****9999</td>
<td>USA</td>
<td><strong>STUDENT_JIMMY</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1229982</td>
<td>Student_Josephine</td>
<td>Female</td>
<td>09/12</td>
<td>(blank)</td>
<td>****1111</td>
<td>USA</td>
<td><strong>STUDENT_JOSEPHINE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1954365</td>
<td>Student_Josephine</td>
<td>Female</td>
<td>01/01</td>
<td>(blank)</td>
<td>****9999</td>
<td>USA</td>
<td><strong>STUDENT_JOSEPHINE</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
9. The FERPA transactional page displays.

**FERPA**

Josephine Student

ID: 1229382

☐ FERPA When checked, personal information will be restricted from release according to FERPA guidelines and policies.

This student allows the release of his/her directory information.

**Note:** The default for FERPA is to allow the release of directory information. To indicate that he/she does not allow the release of directory information, a student must login to My Akron and access the Student Center on the My Experience page.
10. If this is not the record to review, use the toolbar buttons at the bottom of the page to:

- Remain on the transactional page and view other records in the search results.
  Use the Previous in List and Next in List buttons to move up and down in the Search Results.

-OR-

- Return to the search page.

Select from the search results.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Campus ID</th>
<th>National ID</th>
<th>National ID Country</th>
<th>SSN</th>
<th>Short Description</th>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1839943</td>
<td>Student, Jimmy</td>
<td>Unknown</td>
<td>(blank)</td>
<td>(blank)</td>
<td>999997</td>
<td>USA</td>
<td>SSN</td>
<td>STUDENT JIMMY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1229992</td>
<td>Student, Josephine P</td>
<td>Female</td>
<td>05/12</td>
<td>(blank)</td>
<td>11111111</td>
<td>USA</td>
<td>SSN</td>
<td>STUDENT JOSEPHINE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1984985</td>
<td>Student, Josephine</td>
<td>Female</td>
<td>05/01</td>
<td>(blank)</td>
<td>999997</td>
<td>USA</td>
<td>SSN</td>
<td>STUDENT JOSEPHINE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

-OR-

- Return to the search page.

Clear the existing criteria.

Enter new criteria to search for another record.
Exercise 5.2: Hide the Menu and Use Full Screen View

Hide the menu and/or use Full Screen view to make more window space available for working with data.

1. To hide the menu, click on the **Collapse** button.

2. To show the menu, again, click on the **Expand** button.

3. To hide the browser’s toolbars and title bar and the Windows taskbar, press the F11 key.
   
   This view is called Full Screen view. It allows more display area for the PeopleSoft pages.

4. Press F11 again to return to the Normal view in the browser.
### Exercise 5.3: Use and Read Transactional Pages

#### Student Administration Terms

The terms listed below are used frequently in PeopleSoft CS (Campus Solutions). You need to know these terms in order to identify the student data that you need.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Institution</td>
<td>AKRON - The University of Akron</td>
</tr>
<tr>
<td>Academic Group</td>
<td>This is a College within The University, such as University College or the College of Education. Examples: UNIV, EDUC</td>
</tr>
<tr>
<td>Department</td>
<td>A group organized for a particular subject area, such as the Accounting Department or the Chemistry Department.</td>
</tr>
<tr>
<td>Academic Career</td>
<td>Undergraduate, Graduate or Law (UGRD, GRAD, LAW)</td>
</tr>
<tr>
<td>Academic Program</td>
<td>This is a combination of the College to which the student was admitted and the student’s academic goal. Examples: ENGRU (Engineering undergraduate), A&amp;SG (Arts &amp; Sciences graduate)</td>
</tr>
<tr>
<td>Academic Plan</td>
<td>The majors are listed as academic plans and the minors as academic sub-plans. Examples: 370000BA (BA in Political Science) 398006PHD (PHD in Urban Studies &amp; Public Affairs)</td>
</tr>
<tr>
<td>ID (EmplID)</td>
<td>Unique up to eleven digit value assigned to an individual in the PeopleSoft system. Example: 1229982</td>
</tr>
</tbody>
</table>
**Academic Term Codes**

It is helpful to know the codes for the Academic Terms. The Academic Term Code is composed of four digits, such as 4141.

The first three digits are for the year.
- First digit: This is the century. For the 2000’s, the code is a 4. (For the 1900’s, the code is a 3.)
- Second and third digits: These are the last two digits of the year.

  414 is the code for the year 2014.

The last digit is for the term.
- Fourth digit: Spring= 1, Summer= 3, and Fall= 7.

  1 is the code for Spring.

**4141 is the code for 2014 Spring.**
Review Page Elements

1. Click on the Home link in the Navigation Header to return to the Home Page.

2. In class, navigate to the Student Program/Plan page:
   Records and Enrollment > Career and Program Information >
   Student Program Plan
   The search page displays.

   PeopleSoft remembers the last student’s or employee’s ID for which you searched in this session. This is an option called Carry ID, which is set by default in PeopleSoft.

3. On the Search page:
   - Click on Clear to remove the ID that was carried.
   - Enter the ID 1229982.
   - Select Undergraduate as the Academic Career.
   - Mark the checkbox for Include History.
     Note: When reviewing the Student Program Plan pages, always mark the Include History box. This choice displays the historical rows of data, as well as the current and future rows.
   - Click on the Search button.
   The search results display.
4. From the search results, select the row for student career 2, **Bus UG** program.

5. Hide (collapse) the Menu.

6. These pages allow you to view the Student's Program and Plan.

   In this example, you view several rows of data to determine the student was a Business Undergraduate with an uncertain Business Administration major, who is transferring to an Engineering Program with an uncertain Engineering major.
7. Use the **View tools** to **View All** the data rows on one page -OR- to move forward and backward in the rows of Student Program data. Note the effective date of each row to see any changes in the Student Program over time.

8. Return to the first row (current row) of data. Note the student’s Academic Program.

9. Click on the Student Plan tab. The **Header** remains the same. The frame below the Header displays the Student Program rows. Initially, this displays the row that was selected on the Student Program page. The View tools allow the viewing of any of the rows.

10. The frame below the Student Program displays the Student Plan (major) related to the displayed Student Program. In this example, you see an Inter College Transfer to Engr UG (Engineering Undergraduate) with an Engineering-Major Uncertain. Use the View tools in the Student Program frame to display other rows of data and note the related Student Plan rows. Watch for Student Programs with more than one related Student Plan row.
11. **Information icons** display in the Header. These icons are links to additional data.

- Negative Service Indicator
- Positive Service Indicator
- FERPA

Service Indicators also are referred to as Holds.

12. Click on the Positive Service Indicator icon ⭐ .

The Manage Service Indicators page displays. The Effect field indicates that the rows of data are filtered to display only the Positive Service Indicators.

**Manage Service Indicators**

*Josephine P Student*

<table>
<thead>
<tr>
<th>Code</th>
<th>Code Description</th>
<th>Reason Description</th>
<th>Institution</th>
<th>Start Term</th>
<th>End Term</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
</table>

Positive Service Indicators are entered to grant privileges or services to a student, such as the privilege to enroll early.
13. Click on the down arrow for the Effect field and select to see only the Negative Service Indicators. The data does not refresh automatically. You need to click on the Refresh link or icon. 

Negative Service Indicators are entered to restrict privileges. An example is the ENR indicator which prevents the student from enrolling in classes.

14. Always note the **Start Term** for the indicator. That is when the indicator takes effect. The indicator may not be in effect at the current time. It may take effect in a future term. In the example above, the student is prevented from enrolling in classes beginning in 2014 Fall.

15. For further information about a particular Service Indicator, click on its link in the Code column. In this example, click on ENR. Scroll to the bottom of the page and click on OK or on Cancel.

16. The table displaying the Service Indicator rows is called a **grid**. In this grid, all of the column headers can be used to sort the rows of data. Click once on a column label, such as Reason Description, to sort the rows in ascending order. Click again to sort the rows in descending order.

17. In the Effect field, select All to display both the negative and the positive Service Indicators. Click on Refresh.

18. In the View tools, there is a Download to Excel tool.
19. Click on the Download tool.

The following download message displays in a separate window.

If the indicates your download has been blocked, permit the download by clicking on its Information Bar and selecting "Download File...".

Then, the following prompt displays.

20. Click on Open.

This message displays.

If this message is not visible, it may be displayed behind the open windows. Minimize (do not close) windows until the message displays.

21. Click on Yes.

Excel opens and the data from the grid displays in an Excel worksheet.

22. Save the Excel workbook, if necessary, and close Excel.
23. Close the window that displays the download message.
   The Manage Service Indicators page displays.

24. Click on Cancel to go back a step in PeopleSoft and display the Student Program/Plan pages.
Effective Dating

PeopleSoft uses effective dating to allow the storage of historical, current, and future data. Effective dating enables the University to maintain a chronological history of the data.

PeopleSoft uses three different categories to classify effective dates:

- **Current**: The data row with the effective date closest to today’s (the system) date, but not a future date.
- **History**: Data rows that have effective dates earlier than the current data row.
- **Future**: Data rows that have effective dates later than today’s (the system) date.

Not all rows of data have an effective date.

1. Review these Toolbar buttons at the bottom of the page on the right.

   The **Include History** button is inactive (grayed-out) to indicate that it is selected. All the rows of data (history, current, and future) currently are available on this page.

   The **Update/Display** button is not selected. When this button is selected, only the current and future rows of data are available on the page. Historical data is not available on the page.

2. Click on the Student Program tab.

   In the View tools, note the number of rows that are available.

3. Click on the Update/Display button.

   Now, only the current and future rows are available.

   In the View tools, note the number of rows that are available.

   **Update/Display is the default in PeopleSoft.** This means that unless Include History is selected, the Update/Display mode is in effect and only the current and future rows of data display.

4. Some users have security to edit any of the existing rows of data.

   These users have the **Correct History** button, which allows the editing of all existing rows of data.
**Note**: Your security determines what you can view and whether or not you can edit data in PeopleSoft. Some users, who can edit, can enter/edit only rows with an effective date after the current row. Some users can enter/edit all rows.
Lesson 6: Run a Query

Discussion

Queries are memorized questions in PeopleSoft. When a query is run, the answer to the question is given as a series of rows of data. If a report is desired, the data can be downloaded to Excel.

Business offices, such as the Registrar’s Office, periodically send email with the name of a query or queries that it is suggested be run. As examples, these queries may be end-of-term queries listing the students on the Dean’s list or the students awarded degrees.

The Query Viewer enables you to:

- Locate a query using a basic or advanced search
- Run a query
- Download the results of a query to a Microsoft Excel worksheet

Note: In addition to PeopleSoft Query, another reporting tool, ZipReports, is available. If you need to access current data about students, ZipReports presents a collection of pre-defined queries and reports. It allows access to the most frequently requested student administration data that is stored in PeopleSoft.

You may register for the ZipReports seminar at [https://www.uakron.edu/seminars](https://www.uakron.edu/seminars).
Exercise 6.1: Run a Query

1. Navigate using the following path:
   Reporting Tools > Query > Query Viewer

   Query Viewer

   Enter any information you have and click Search. Leave fields blank for a list of all values.
   * Search By:  
   Query Name begins with
   Query Viewer

2. If the beginning characters of the Query Name or Description are known, remain on the Basic Search page.
   - Search by Query Name or Description by selecting one of those options at the down arrow.
   - In the edit box after “begins with,” enter the beginning characters of the Query Name or Description.

   Tips to search for queries: Many users, who create queries:
   - Begin the query name with U and their initials or U and an abbreviation for their department. Examples: U_R for many of the Registrar’s queries, UHRIS for Human Resources Information Services
   - Use keywords in the Description field to make the query easy to find. Examples: Degree, Plan, PERC

   - Click on Search.
   - Proceed to step 5 if your query is located.
     -OR-
     Proceed to step 3 for an advanced search.

3. If you cannot locate a query by the beginning characters of the Query Name or the Description, click on the Advanced Search link.
4. Enter the criteria to locate the query.
   Examples:
   - If a part of the Query Name is known, but not necessarily the beginning of the Query Name, change the operator to **contains** and enter the part of the name that is known.
     
     ```
     Query Name: contains EOT
     ```
   - If a part of the Description is known, but not necessarily the beginning of the Query Description, change the operator to **contains** and enter the part of the description that is known.
     
     ```
     Description: contains BIRTHDAY
     ```
   In class, use only the criterion **Description contains birthday**.

5. Click on Search.

6. The queries that match the Search criteria display.
   The View tools indicate the number of queries that were returned.

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

   **Search Results**
   ```
   Query Name Description Priority Label View HTML Excel XML Schedule Favorite
   UPER_HQUERY birthday list Private HTML Excel XML Schedule Favorite
   UPER_HQUERY_CLASS birthdays Private HTML Excel XML Schedule Favorite
   ```
7. Locate the query to run and select either the link:
   - For HTML (to open the query in the web browser)
   - OR-
   - For Excel (to run the query directly to a Microsoft Excel worksheet

   In class, run UPKR_HRQUERY using the HTML option.

   **Note:** If the HTML link is selected, the query results display in the browser and, then, you can choose to open the query results in Excel as a formatted spreadsheet or as a CSV text file. If you are uncertain which option to select, select CSV. Also, CSV is the better option if the data will be used for a mail merge in Word.

8. If the HTML option is selected, a second, separate window opens in the browser. In that window, one of two things will occur.
   - The query will run and the results display.
   - OR-
   - You are prompted for criteria.
     If prompted, enter the criteria and click on View Results.

   **Example:**

   ![Query Result Display](image)

   The results display.

9. When the results are displayed in the browser, select a Download option to save the file or create a report in Excel.

   In this example, select **CSV Text File**.

   ![CSV Text File Download](image)
10. TROUBLESHOOT:
If the link for Excel was selected and problems are encountered:
- Run the query again, selecting the HTML link.
- When the results display in the browser, select CSV Text File (Comma Separated Values file). The results open in Excel.

11. If this message displays, click on Open.

12. If this message displays, click on Yes.

13. Excel opens and the query results display in a worksheet.

14. Save the worksheet, if you want to keep a record of the results. Close the Query results window.
Lesson 7: Technical Information

Passwords

Discussion

Your PeopleSoft User ID and Password allow you to access the resources required to perform your job functions.

When creating a password, it:

- Must be a minimum of 8 characters
- Must contain at least one number and one letter
- May be in upper, lower or mixed (upper and lower) case
- May include special characters, such as $#
- May not include a space

Passwords are case sensitive.

It is imperative that you safeguard your User ID and Password by following these guidelines:

- Memorize all passwords.
- Passwords should be easy to remember, but not easy for someone else to guess. The names of family, pets, or hobbies do not make good passwords.
- Never write down your password. All written records of passwords should be destroyed.
- You will be forced by the system to change the password every 180 days. However, resetting your password every 30 days will provide a greater level of security.
- If somebody contacts you in person, via the telephone, or by e-mail asking for your PeopleSoft password, do not give it to them. No one needs to know your PeopleSoft password. If somebody does ask for your password, notify the PeopleSoft Security Administrator, Sheila Thomas, at tsheila@uakron.edu.
- Never share your User ID or Password with anyone. Keep in mind that you will be held accountable for their actions.

Contacts for Password/Security Issues

- If you forgot your password for PeopleSoft or would like to speak with someone regarding your PeopleSoft security, contact the Support Desk at 330.972.6888.
- If you need to apply for or modify your PeopleSoft security, complete the security request form, which is available at https://footprints.uakron.edu/secure/ps.
**Exercise 7.1: Change Your Password**

1. Sign in to PeopleSoft.

2. From the Menu, select the link for **Change My Password**.

3. In the **Current Password** field, enter your password.

4. In the **New Password** field, enter a new password.
   - Keep in mind the password requirements on the previous page.

5. Enter the new password, again, in the **Confirm Password** field.

6. Click on the **Change Password** button.
Clear Cache

Discussion

The temporary Internet files are copies of the web pages that you recently opened. The web pages are copied, so that if you open them again, the pages will be displayed quickly. When there are new pages or changes to a web site, however, your computer may return to the cached page first, which can cause problems when you are working in PeopleSoft. A typical cache problem is that pages will not load properly. Therefore, it is a best practice to clear the cache frequently.

Exercise 7.2: Clear Cache in the Internet Explorer

1. From Internet Explorer, click on the Tools button or select Tools from the browser’s menu.
2. Select Internet Options.
3. Select the General tab.

Click the Delete button in the Browsing History section.
4. The Browsing History Categories are listed.

- Mark the first three checkboxes.

![Internet Options dialog box](image)

- Click the Delete button to delete cache and cookies. This includes copies of web pages, images, and media that are saved for viewing. Temporary Internet Files also are referred to as cache.

  The progress bar displays. When the cache and cookies are deleted, the General tab of the Internet Options dialog box displays as shown in step 3.

5. Click the OK button in the Internet Options dialog box.
Exercise 7.3: Clear Cache in Google Chrome

1. From Google Chrome, click on the Customize and Control Google icon on the browser toolbar.

2. Select **More Tools**.

3. Select **Clear Browsing data**.
4. Select **beginning of time** from the drop-down at the top of the dialog.

5. Select the checkboxes for: **Browsing history, download history, cookies and other site plug-in data**, and **cached images and files**.

6. Click **Clear browsing data**.
Lesson 8: Locate PeopleSoft Training and Documentation on the Web

The home web page of Software Training and Technological Services contains links to:

- Hard copy manuals and job aids – Download materials that you can print through Adobe Reader.
- Web-based audio-visual tutorials – Watch and listen to a video that leads you through the steps of common procedures in PeopleSoft and other software.

When you are back at your desk, open your browser, such as the Internet Explorer, and navigate to http://www.uakron.edu/training/. Click on the Faculty – Staff tab and locate the materials that you need. Set the training page as a Favorite so that you easily can check for instructions and updates when needed.
Appendix A: PeopleSoft Self-Service

The PeopleSoft self-service applications are available, both on and off campus, within The University portal, My Akron.

- Open a supported browser and go to http://www.uakron.edu.
- Click on the My Akron link at the top of UA’s home page.
- Login to My Akron with your UAnet ID and password.

Your relationship to The University determines which tabs, links, and web parts are available to you.

**Note:** Supported browsers are listed in My Akron on the Technology Support tab.

At this writing, the supported browsers are:

![Supported Browsers Table](image)
Student Self-Service

Students can select the My Experience tab in My Akron and click on Student Center. The Student Center is the access to the PeopleSoft self-service applications for students.

Students may complete and manage a wide range of activities using the links on the Student Center page.
Faculty Self-Service

Faculty can select the Faculty/Staff tab in My Akron and click on Faculty Center. The Faculty Center is the access to the PeopleSoft self-service applications for faculty.

In the Faculty Center, tabs, links, buttons, and icons are used to navigate to other pages and to filter the data.
Employee Self-Service

Employees can select the Faculty/Staff tab in My Akron to use the My Benefits, My Compensation, My Profile, and My Career links, which access the PeopleSoft self-service applications for employees.
Appendix B: Print a Student’s Schedule

Discussion

There is more than one method to view and print a student’s schedule for a particular term. Your security determines which methods are available to you.

Two methods are outlined here:

- View and print from the Enrollment Summary page
- View and print from the Quick Enrollment page

Exercise B.1: View and Print from the Enrollment Summary Page

Follow these instructions to view and print a student’s enrollment summary, also referred to as a study list.

When the enrollment summary is viewed, it displays as shown below.

However, when this same enrollment summary is printed, additional information is included. The course dates, meeting times, meeting place and instructor name are present as shown here.
1. Navigate using the following path:

   **Records and Enrollment> Enrollment Summaries> Enrollment Summary**

   ![Enrollment Summary Form]

2. Enter the student’s **ID**.
   In this example, use 1229982.

3. In the **Academic Career** field, use the drop down to select the appropriate career.
   In this example, select Undergraduate.

4. **Academic Institution** is AKRON.

5. To select a Term:
   - Click on the **Lookup Term tool**.
     Click on Look Up.
     Select a Term from the list.
     - **OR** -
     - Type the appropriate term value.
      
      In class, select **4147**, which is 2014 Fall.

6. Click on Search.
7. Review the Enrollment Summary page that displays.
   The page looks similar to this, but may list a different class schedule.

   ![Enrollment Summary Image]

   View tools

8. Use the View Tools to verify that all the rows are displayed.
   If necessary, select **View All** to get a list of all courses for which the student enrolled in 2012 Fall.

   ![View Tools Image]

   Use the Lookup tool before a class number to review additional information about the class.

   ![Lookup Tool Image]

9. To process the report, click on the **Print Study List** link.
   **Note:** By default, the Study List report is available for printing through the Report Manager.
10. To view or print the report, click on the Report Manager link.

The Report Manager pages display.

Click on the Administration tab, if necessary, to display the list of your reports.

11. The Report Manager page does not automatically refresh its display.
To view and print the report, the report Status must be **Posted**.

Click on the Refresh button to update the list of reports and their statuses.
It may be necessary to wait a minute or more and click on the Refresh button again.

12. When the Status is Posted, click on the link for the report in the **Description** column.

![Class Schedule Report](image)

14. Hover the mouse pointer near the bottom of the Adobe window to display the floating toolbar.

   Click the printer button ![Printer Icon] and, then, click on Print.

   The class schedule prints.

15. Close the Adobe window.

   The Report Manager displays.

16. Click on the **Go back to Enrollment Summary** link to create another report.

   -OR-

   Click on the **Home** link in the Navigation header to return to the main menu page.
Exercise B.2: View and Print from the Quick Enrollment Page

The Quick Enrollment page may be used to print a student's schedule (study list), even if you are not enrolling or dropping a class for a student.

You must have security to enroll a student in order to access this page.

View the Study List

1. Follow the path:
   Records and Enrollment > Enroll Students > Quick Enroll a Student
   The Quick Enroll a Student – Add a New Value page displays.

   ![Quick Enroll a Student](image)

   1. Enter the student's ID.
      In this example, it is 1229982.

   2. To select the student's Academic Career:
      - Click on the Lookup tool and then Look Up to select from the list.
      - OR-
      - Enter UGRD or GRAD, or LAW.
      The careers shown in the list at Look Up will be those that match the student's careers at UA.
      In this example, select Undergrad or enter UGRD.
4. Click on the Lookup tool and then Look Up to select the **Term**

Enter the Term code. An example is 4127, which is the code for 2012 Fall

Quick Enroll a Student

```
ID: 1229992
Academic Career: Undergrad
Academic Institution: AKRON
Term: 4147
```

**Add**

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

5. Click on the Add button.

The Quick Enrollment page displays.

Quick Enrollment

```
Request ID: 0000000000
Josephine Student
ID: 1229992
Career: Undergrad
Institution: U of Akron
Terms: 2014 Fall
```

View Enrollment Access
Calculate Tuition
Study List
Enrollment Appointments
Term Session Withdrawal

Save Verify Add
6. At the bottom of the page, click on Study List. The student's schedule displays.
Print the Study List

1. Click on the Expand/Collapse tool to hide the Menu.

2. On the PeopleSoft page to be printed, right click with the mouse.

3. From the shortcut menu that displays, choose Select All.

   The items on the web page are selected (highlighted).

4. Select File, Print Preview from the Internet Explorer menu.
5. In the Internet Explorer’s Print Preview toolbar, click on the drop down arrow to choose **Only the selected frame** (or As selected on screen).

6. Use the Page Setup button or in the Print Preview toolbar to change the orientation, paper size, margins, printer, or number of copies.

7. To resize the text on the page(s) to be printed, click on the drop down arrow at **Shrink To Fit** and Select the desired size increase or decrease.

   Print Preview displays the sizing change.

8. To print, click on the **Print** button or .

9. In PeopleSoft, scroll down to the bottom of the page and click on Cancel.

**In Firefox:**
- Right mouse click on the web page.
- Select **This Frame > Print Frame**. The Print dialog box displays.
- Click on the Print button.

**In Safari:**
- Control + click.
- Select **Open Frame in New Window** or **Open Frame in New Tab**.
- Print.
Appendix C: Print Unofficial Transcripts

Exercise C.1: Processing a Transcript

1. Select the path:
   
   Records and Enrollment > Transcripts > Transcript Request
   
   The Transcript Request – Find an Existing Value page displays.

   ![Transcript Request Page]

2. Click on the **Add a New Value** tab.
   
   The Request Header page displays.

   ![Request Header Page]

   Required fields are indicated by an asterisk before the field name.

   ![Required Fields Indicated]

   Although not marked as required, the Request Reason field should be completed.

3. **Institution** is AKRON.

4. **Transcript Type** is UNOFF.

5. **Output Destination** is Printer.
6. Select a **Request Reason** from the list at the down arrow

7. Click on the Request Detail tab.
   The Request Detail page displays.

8. Enter the appropriate student *ID*. 
   In this example, the ID is 1229982.

9. **OPTIONAL:** To run more than one student’s transcript at a time, click the Add a Row button [+] and repeat step 8.
   
   **Note:** If you continue to use the [+] on the last row added, the transcripts will be printed in alphabetical order from the Request Detail page.

   To delete a row, place the cursor in that row and click on that row’s Delete a Row button [−]. At the prompt, confirm the deletion by clicking on OK.

10. Click on the Process Request button, when all of the student IDs are entered.
    The system processes the transcript request(s) and moves the display to the **Report Results** page for a view of the transcript(s).
    Do not print from the Report Results page. The Report Results page is for viewing.

11. To view other requested transcripts, remain on the Report Results page and use the previous and next buttons in the View tools on the Report Results page.
Exercise C.2: Printing a Transcript

2. Click on the Request Detail tab. The Request Detail page displays.

3. On the Request Detail page, click on the Print button to send the transcript report to the Report Manager.
4. Click on the Report Manager link.
   The Administration page of the Report Manager displays.

   ![Report Manager Admin page screenshot]

5. If you do not see your report or the status is not Posted, click Refresh until the report status is **Posted**, and the Transcript Print All link displays.

   **Note**: The statuses you may see are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>The server has not reviewed your report request, yet.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>The process was added to the report request.</td>
</tr>
<tr>
<td>Processing</td>
<td>Process Scheduler has initiated the program and is running the process.</td>
</tr>
<tr>
<td>Generated</td>
<td>The report has finished processing and all files are available for transferring.</td>
</tr>
<tr>
<td>Posting</td>
<td>The report is in the process of being transferred to your Report Manager.</td>
</tr>
<tr>
<td>Posted</td>
<td>The report has posted to your Report Manager and is ready to be viewed.</td>
</tr>
</tbody>
</table>

6. Click on the Transcript Print All link.
   A separate Adobe Reader window opens with the transcript(s) displayed.
7. Hover the mouse pointer at the bottom of the Adobe Reader window. The Adobe toolbar displays.

8. Click the printer button 🗽 and, then, click on Print. The transcript(s) print.


10. At the bottom of the page, click on the Go back to Transcript Request link. The Transcript Request page displays.

11. OPTIONAL: To process additional transcripts, click on the Request Header tab. The Request Header page displays. The fields will be inactive (grayed out) and inaccessible.
12. OPTIONAL: On the Request Header page, click on the Add button. The fields are cleared and available for entering a new transcript request.

Return to step 3 on page 69.
Appendix D: Print a Phase Report (Schedule of Classes)

Discussion

The Phase Report allows Departments to create their own hard copy of the Schedule of Classes.

The FIRST TIME that you create this report, you need to create a Run Control ID. This Run Control ID helps to store the options that you choose to set for the report that you are creating.

Path: Curriculum Management > Schedule of Classes > Print Class Schedule

The FIRST TIME that you create this report:
1. Enter the path as shown above.
2. On the Print Class Schedule page, click on the Add a New Value tab.
3. In the Run Control ID field, type SOC.
4. Click on Add.

The Schedule of Classes page displays. Follow the instructions on the next pages.

Once you have created this report, to create it in the future:
1. Enter the path as shown above.
2. On the Print Class Schedule page, stay on the Find an Existing Value tab.
3. Click on Search.
4. In the Search Results that appear under the blue bar, click the link SOC.

The Schedule of Classes page is displayed. Follow the instructions on the next pages to change any of the criteria. Save any changes to the criteria.
Exercise D.1: Print a Phase Report

1. Follow the instructions on the previous page to create or select a Run Control ID.

2. **Academic Institution** defaults to AKRON. Do not change.

3. Enter the **Term** code.

   -OR-

   Use the Lookup tool and then click Look Up to select the Term from the list.

4. Select an **Academic Organization Node**.
   
   You have the option of running the Schedule of Classes by Subject/Department or College or all of The University of Akron.

   Click the Lookup tool, then Look Up to make your selection.

   **IMPORTANT:** Select the alpha code for a Department, College, or The University of Akron, not the numeric code. The alpha codes display toward the end of the list at Look Up.

5. Leave **Session** blank to choose the entire, regular academic term.

   Use the Lookup tool to select only one of the Summer sessions or one of the 7.5 week sessions in Fall or Spring.

6. Select Yes or All for **Schedule Print**.
   
   All shows the non-print courses. Non-print courses are the courses that do not appear when the students register online.
7. Select Yes, No, or All for *Print Instructor in Schedule.*

8. If you want to print only Akron, Wayne or Summit College sections, mark **Print by Campus.**
   The Campus field will become available. Click on the Lookup tool and then Look Up to select the Campus to print.

9. If you select a campus, you also may select a particular location for that campus, such as UA Lakewood.

10. Click to mark any/all of the **Class Status** checkboxes: Active, Stop Enrl or Cancelled.

11. Click on the **Report Options** tab. The Report Options page displays

12. Click to mark any of the **Report Options** that are needed.

13. Click to mark the option for **Report Only.**

14. Click on **Save** to save the changes made.

15. Click on **Run**.
   The Process Scheduler Request page displays.
16. At **Server Name**, select **PSNT**.

17. Click to mark the checkbox for the **Schedule of Classes** report.

18. At **Type**, select **Web**.

19. At **Format**, select **PDF**.

20. Click on OK.
   The Report Options page displays.

21. Click on the **Report Manager** link.
   The Report Manager pages display.

22. Click on the Administration tab.
23. Your most recent report will display at the top of the list.
   The Report Description will be **Schedule of Classes**.
   
   **Note:** The Report Manager pages also are available at the path
   Reporting Tools > Report Manager.

24. If you do not see your report or the status is not Posted,
   click **Refresh** until the report status is **Posted**, and the report name
   **Schedule of Classes** displays as a link in the **Description** column.
   
   **Note:** The statuses you may see are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>The server has not reviewed your report request, yet.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>The process was just added to the report request.</td>
</tr>
<tr>
<td>Processing</td>
<td>Process Scheduler has initiated the program and is running the process at</td>
</tr>
<tr>
<td></td>
<td>that time.</td>
</tr>
<tr>
<td>Generated</td>
<td>The report has finished processing and all files are available for transferring.</td>
</tr>
<tr>
<td>Posting</td>
<td>The report is in the process of being transferred to the Report Repository.</td>
</tr>
<tr>
<td>Posted</td>
<td>The report has finished posting and is ready to be viewed.</td>
</tr>
</tbody>
</table>

25. Click on the **Schedule of Classes** Description link.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>College of Engineering - Subjects, Chemical Engineering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Name</td>
<td>Professor Name</td>
</tr>
<tr>
<td>Date Printed</td>
<td>06/04/2013</td>
</tr>
<tr>
<td>Week Days</td>
<td>MTA</td>
</tr>
<tr>
<td>Classes</td>
<td>GE101.01, GE101.02</td>
</tr>
<tr>
<td>Instructors</td>
<td>C. Sun, Z. Zhang</td>
</tr>
<tr>
<td>Dates</td>
<td>06/04/2013 - 06/14/2013</td>
</tr>
</tbody>
</table>

27. Hover the mouse near the bottom of the page. The Adobe toolbar displays.

28. Click the printer button and, then, click on Print. The phase report prints.

   OPTIONAL: You also may save the report in PDF format by clicking on the Save tool in the Adobe Reader toolbar.


30. At the bottom of the page, click on the Go back to Print Class Schedule link to print another report or click on Home in the Navigation Header.