

Student Records BIRT eTranscript Request Reports


Overview

The reports created for eTranscript Request will use BIRT (Business Intelligence Reporting Tools) which is within the IUIE. BIRT allows users to access a dashboard for multiple reports related to a particular business process, in this case eTranscript Request.

Some reports must be separate from the main dashboard because they use different base data. The report for failed inactive authentication (eTranscripts – Requests by inactive students with Failed Auth) is an example of this. It must be accessed separate from the main dashboard under Student > Records > Registrar > Transcripts.

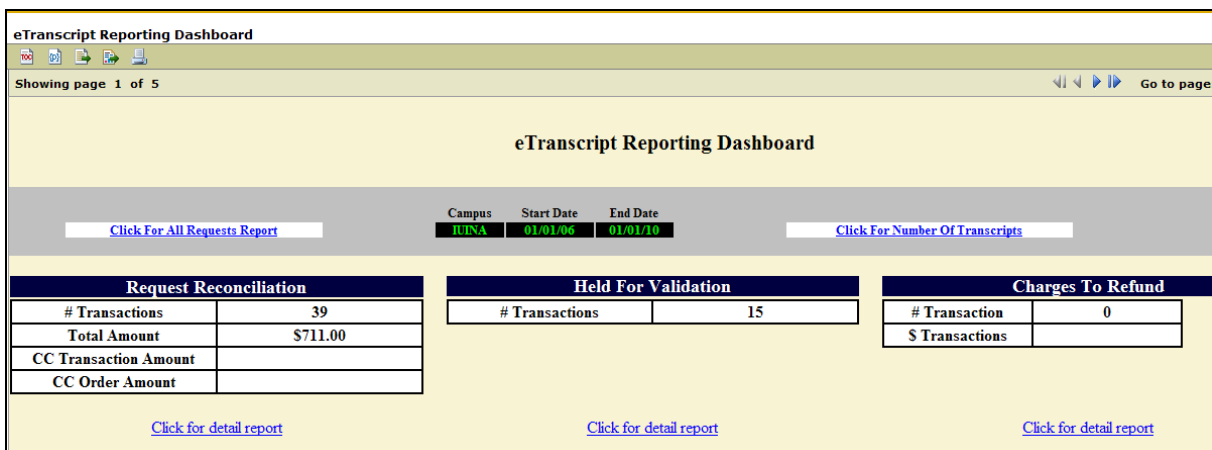
Steps

Navigation to the Dashboard

1. Navigate to: **Access the IUIE > Catalog > Master Catalog > Student > Records > Registrar > Transcripts > eTranscript Reporting Dashboard, v2 (IE_SIS_SR_ETRNSC_DSHBRD)**
2. Enter the **Institution** and **Date Range**.
3. Leave the default **Output Format** set to **Native BIRT Report Viewer**.
4. Click .

Reports Available

1. BIRT is a collection of reports with the summary appearing on the dashboard.



The screenshot shows the eTranscript Reporting Dashboard with the following data:

| Request Reconciliation | |
|------------------------|----------|
| # Transactions | 39 |
| Total Amount | \$711.00 |
| CC Transaction Amount | |
| CC Order Amount | |

| Held For Validation | |
|---------------------|----|
| # Transactions | 15 |

| Charges To Refund | |
|-------------------|---|
| # Transaction | 0 |
| \$ Transactions | |

Navigation links: [Click For All Requests Report](#), [Click For Number Of Transcripts](#), [Click for detail report](#) (under each table).

2. When you first enter the dashboard, you will see a summary of the results for the three different reports created in the **eTranscript Request Reporting Dashboard**:

- *Request Reconciliation* – for credit card reconciliation, should be run nightly or weekly.

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- *Held for Validation* – for requests that require validation prior to processing.
- *Charges to Refund* – for requests that were held and now have a **TRAN** service indicator, therefore requiring refunds.

Moving between reports

1. From the dashboard, you can click on the links for each report for more details.


eTranscript Reporting Dashboard

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[Click For All Requests Report](#) Campus: IUTNA Start Date: 01/01/06 End Date: 01/01/10 [Click For Number Of Transcripts](#)

| Request Reconciliation | | Held For Validation | | Charges To Refund | |
|------------------------|----------|---------------------|----|-------------------|---|
| # Transactions | 39 | # Transactions | 15 | # Transaction | 0 |
| Total Amount | \$711.00 | | | \$ Transactions | |
| CC Transaction Amount | | | | | |
| CC Order Amount | | | | | |

[Click for detail report](#) [Click for detail report](#) [Click for detail report](#)


2. The report details will open in a new window. Click the left arrow  button at the top of the page to return to the dashboard.

eTranscript Reporting Dashboard

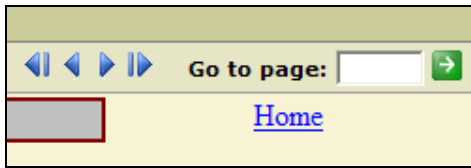
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Request Reconciliation


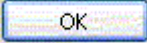
| Date Charged | Transcript Order ID | Report Request Nbr | University ID | Student Name | Nbr of Copies | Amount Charged | Credit Card Confirm Nbr | Credit Card Status | Credit Card Results Msg |
|--------------|---------------------|--------------------|---------------|--------------|---------------|----------------|-------------------------|--------------------|-------------------------|
| 8/25/08 | 2008082513153900 | 6092844 | | | 1 | \$7.00 | 20005108 | 1 | APPROVED |
| 8/25/08 | 2008082513441300 | 6092846 | | | 1 | \$7.00 | 20005114 | 1 | APPROVED |
| 8/27/08 | 2008082716091900 | 6092871 | | | 1 | \$8.00 | 20005159 | 1 | APPROVED |
| 8/28/08 | 2008082811234700 | 006092914 | | | 3 | \$21.00 | 20005172 | 1 | APPROVED |
| 9/2/08 | 2008090210375500 | 6092892 | | | 1 | \$8.50 | 20005249 | 1 | APPROVED |
| 9/2/08 | 2008090210465400 | 006092898 | | | 1 | \$8.50 | 20005252 | 1 | APPROVED |
| 9/3/08 | 2008090315040700 | 006092907 | | | 1 | \$7.00 | 20005311 | 1 | APPROVED |
| 9/9/08 | 2008090916062800 | 006093795 | | | 1 | \$7.00 | 20005420 | 1 | APPROVED |
| 9/9/08 | 2008090920125100 | | | | 1 | \$8.50 | 20005435 | 1 | APPROVED |
| 9/10/08 | 2008091009193500 | | | | 1 | \$7.00 | 20005441 | 1 | APPROVED |
| 9/10/08 | 2008091009392000 | 006093801 | | | 1 | \$7.00 | 20005447 | 1 | APPROVED |
| 9/10/08 | 2008091012024000 | 006093807 | | | 1 | \$7.00 | 20005467 | 1 | APPROVED |
| 9/10/08 | 2008091017234600 | | | | 1 | \$7.00 | 20005481 | 1 | APPROVED |
| 9/16/08 | 2008091609055500 | 006094804 | | | 1 | \$7.00 | 20005612 | 1 | APPROVED |

3. You can click the arrow buttons  to move through the reports.
4. There is a **Home** link on the detail reports in the upper right hand corner. Click **Home** to return to the dashboard.


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Changing Parameters

1. To change the parameters (Institution, Start Date, End Date, etc.) for a report, click the  button at the top of the page. Change the parameters, then click .

A screenshot of a 'Parameter' dialog box. The title bar says 'Parameter'. Inside, it says 'Parameters marked with * are required.' There are three sections: 'Institution Code:' with a radio button selected for 'IUPUI' and another for '%'; 'Start Date: *' with a text field containing '01/01/06'; and 'End Date: *' with a text field containing '01/01/10'. At the bottom are 'OK' and 'Cancel' buttons.

2. Enter the **ID** and click . Select the **Term** and click **View Account Detail**.
3. Review the amounts in Student Financials to ensure that the calculation is correct.

More Reports

1. If you click on one of the report links that does not have summary information, *All Requests Report* or *Number of Transcripts*, these reports will open in a new window. The new window can be closed when you are done with the report.

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eTranscript Reporting Dashboard

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eTranscript Reporting Dashboard

[Click For All Requests Report](#)
Campus: IUPUI
Start Date: 01/01/06
End Date: 01/01/10
[Click For Number Of Transcripts](#)

| Request Reconciliation | | Held For Validation | | Charges To Refund | |
|------------------------|----------|---------------------|----|-------------------|---|
| # Transactions | 39 | # Transactions | 15 | # Transaction | 0 |
| Total Amount | \$711.00 | | | \$ Transactions | |
| CC Transaction Amount | | | | | |
| CC Order Amount | | | | | |

[Click for detail report](#)
[Click for detail report](#)
[Click for detail report](#)

- All Requests** – for details on every eTranscript Request processed. The *All Requests* report will grow quite large over time. To search for a particular name or ID number, click the *All Requests* report link from the dashboard, then enter the **Student's Name** like this %Smith% or **University ID** number on the parameters page. Click .

Parameter ✖

Parameters marked with * are required.

{ } Institution Code:

{ } Request from Date: *

{ } Request to Date: *

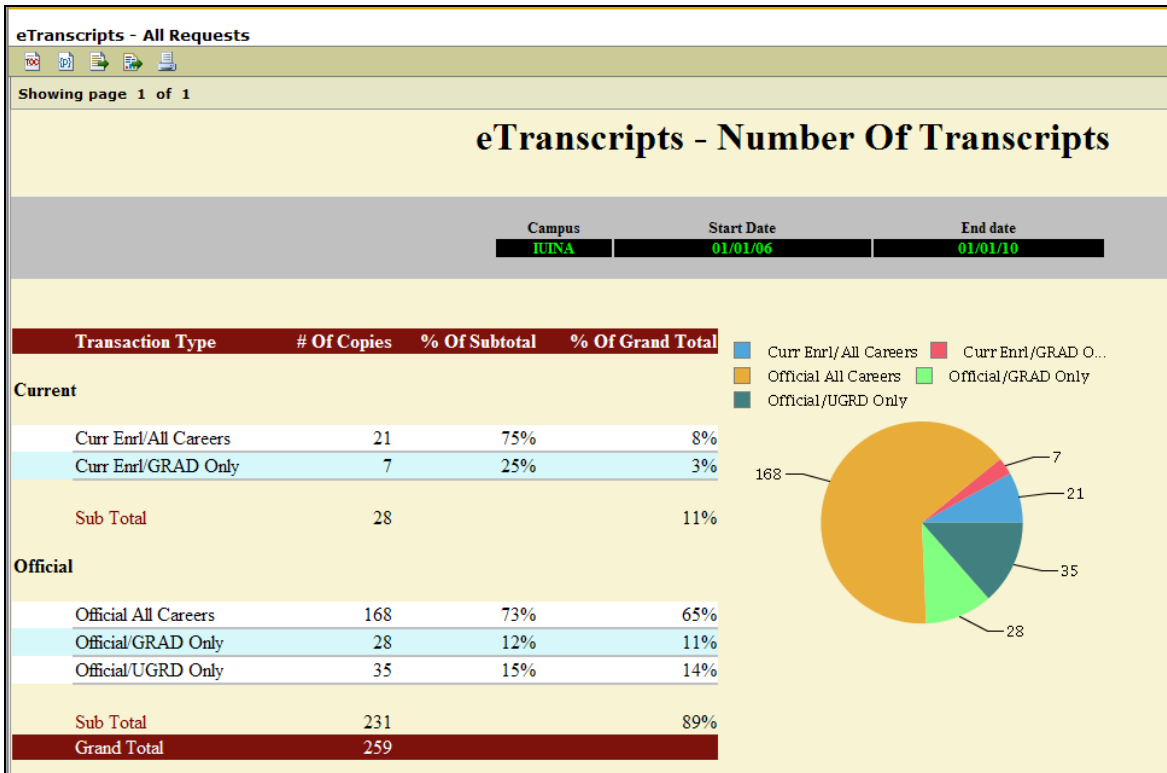
{ } Status: *

{ } Student Name (%Smith%): *

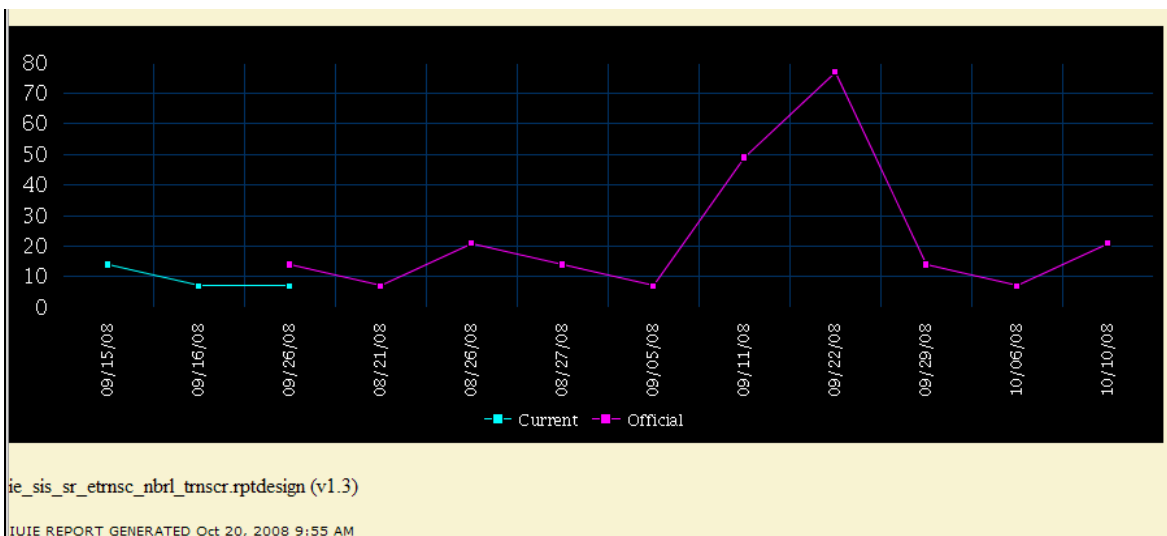
{ } University ID: *

- Number of Transcripts** – for breakdown by transcript type of all requests processed during the time period specified.

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The pie chart represents the number of requests for each transcript type




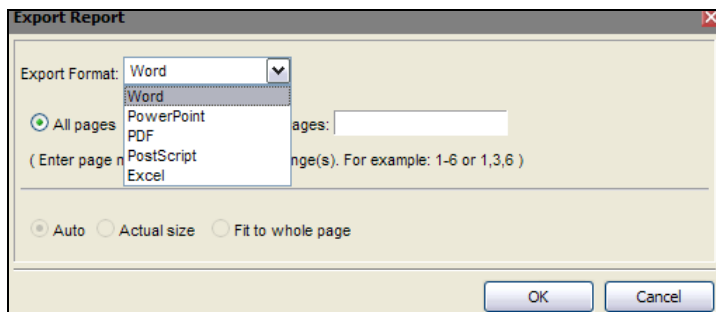
The graph represents the total number of requests produced by date.

Student Records BIRT eTranscript Request Reports

Exporting report to Word or PDF

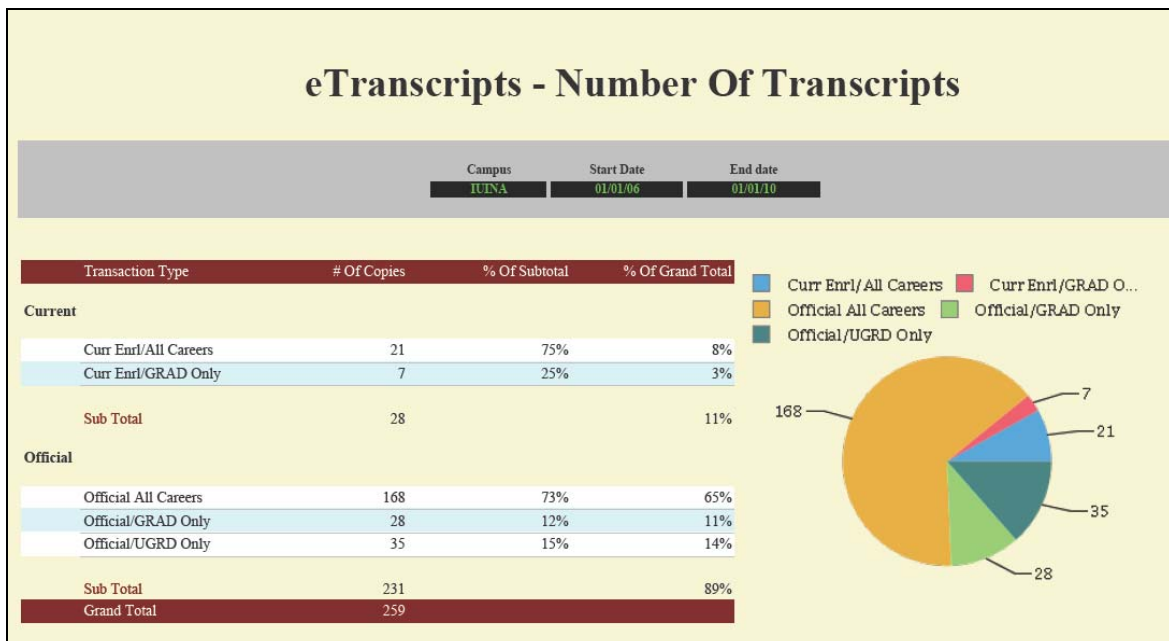
This export takes a snapshot of the page and saves it using another program. The data on the page is not available to edit.

1. In the top, left hand corner of the page, click the fourth button from the left (second piece of paper with a right arrow) .
2. Choose the format you would like to export the report to: Word, PowerPoint, PDF, PostScript, or Excel. This is only recommended for use with Word or PDF. (Use the "Export Data" function for saving data in Excel.)



3. Click .




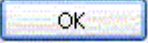
4. The following is a sample of the PDF file.

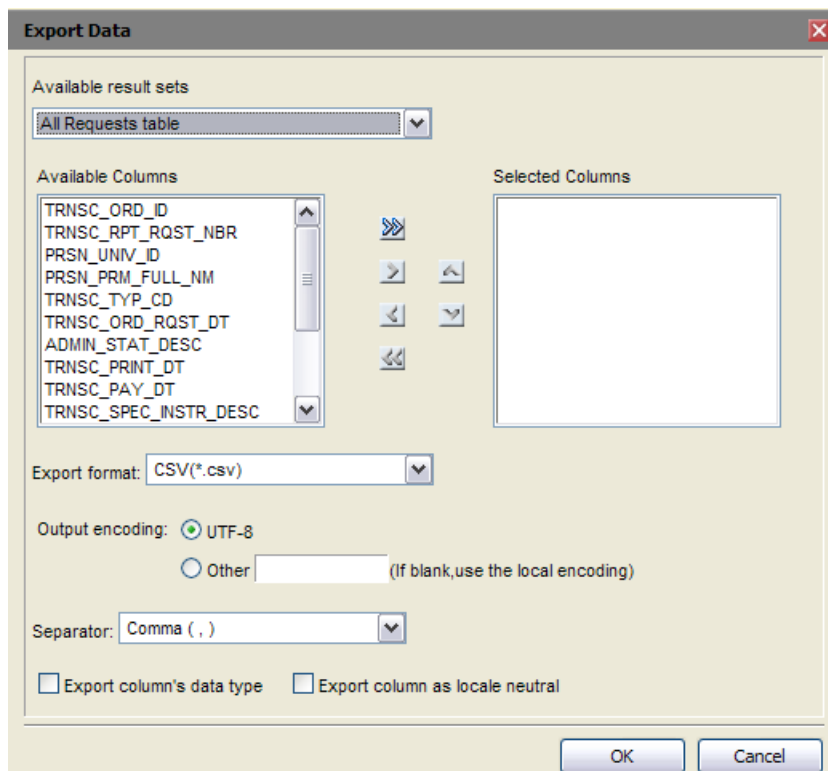


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Exporting Data to Excel

This feature is currently unavailable in the UIE. Fix date to be determined. This export takes the data and creates a .csv (comma separated values) file that can be opened using Excel.

1. From within the report, click the third button from the left (the first piece of paper with the right arrow) .
2. Choose the correct results set. It should look familiar, like the name of the report. Then, click the double right arrow button  to select all of the columns. They will move to the **Selected Columns** box.
3. If you only want to export certain columns, select them individually, then click the single right arrow button .
4. Leave the **Export format** as **CSV** and the **Output encoding** and **Separator** at the default values.
5. Click .



Export Data

Available result sets
All Requests table

Available Columns

- TRNSC_ORD_ID
- TRNSC_RPT_RQST_NBR
- PRSN_UNIV_ID
- PRSN_PRM_FULL_NM
- TRNSC_TYP_CD
- TRNSC_ORD_RQST_DT
- ADMIN_STAT_DESC
- TRNSC_PRINT_DT
- TRNSC_PAY_DT
- TRNSC_SPEC_INSTR_DESC

Selected Columns

Export format: CSV (*.csv)

Output encoding: UTF-8
 Other (if blank, use the local encoding)

Separator: Comma (,)

Export column's data type Export column as locale neutral


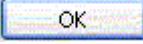
OK Cancel

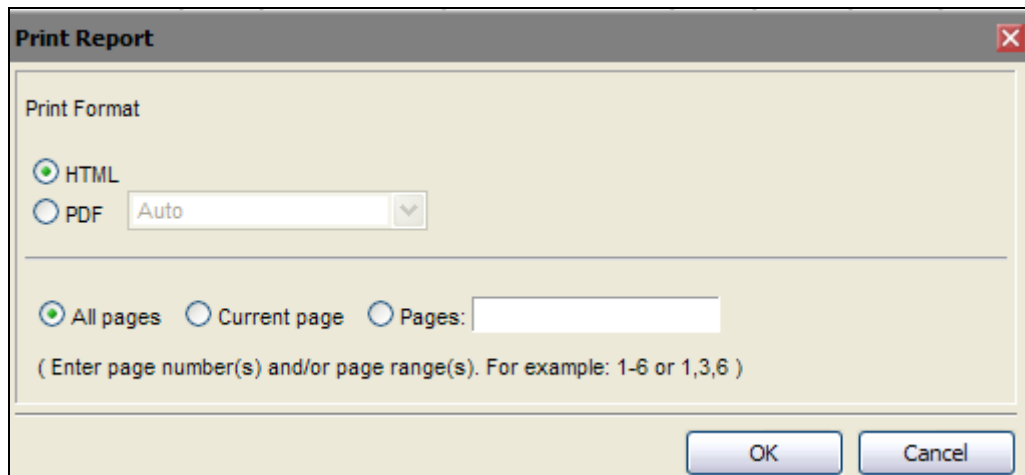
NOTE: The report may take a few minutes to run to completion.

Student Records

BIRT eTranscript Request Reports

Printing a Report

1. Click the print button  in the upper left hand corner of the page to print the documents and their details. When the **Print Report** window appears, if you want to send the document directly to the printer, leave the **Print Format** as **HTML** and click .



The image shows a 'Print Report' dialog box with the following options:

- Print Format:**
 - HTML
 - PDF
- Page Selection:**
 - All pages
 - Current page
 - Pages:

(Enter page number(s) and/or page range(s). For example: 1-6 or 1,3,6)

Buttons: OK, Cancel

2. The *Request Reconciliation*, *Held for Validation*, and *Charges to Refund* reports are considered one report and will print together with the detail information. If you are in the *All Requests* or *Number of Transcripts* report, only that report will print.

NOTE: PDF format is not recommended for these reports.