

The Student Record Summary Report can be used to review multiple Student Record Summaries. You may create a batch of summaries by two methods (**Criteria Based** and **Input File**) and instructions for both will be included.

Criteria Based:

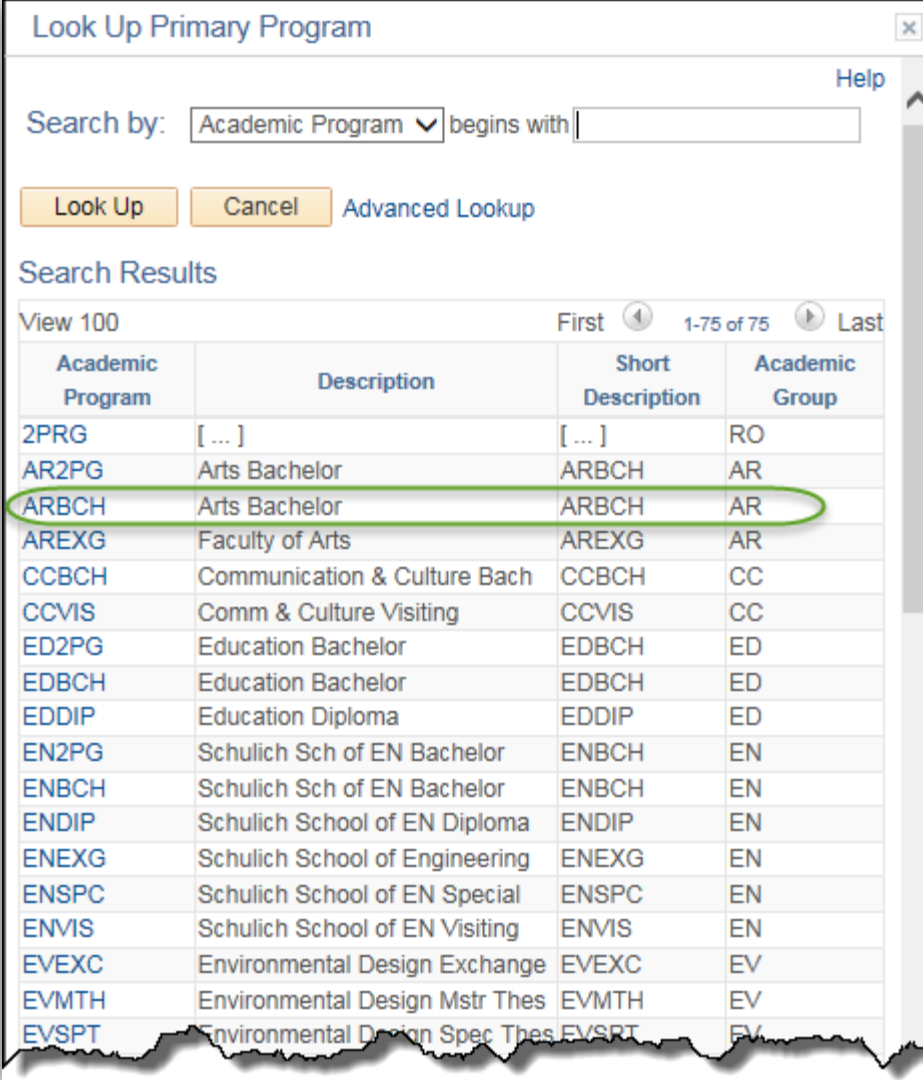
1. Click the **Academic Advisement** link.
[Academic Advisement](#)
2. Click the **Student Record Summary Report** link.
[Student Record Summary Report](#)
3. The first time running a Student Record Summary Report you will have to create a Run Control ID or if you have already created a Run Control ID press **Search** or **Enter**. Click the **Add a New Value** tab.
[Add a New Value](#)
4. Enter a name for the Run Control ID. This can be one word and no spaces. The name of the Run Control ID is not relevant to the process. Tip: Use underscore to join multiple words. Click the **Add** button.

[Add](#)



5. Click the **Look up Academic Career** button. There are 3 Academic Careers. Select the applicable career (e.g. Undergraduate Programs). Click the **UGRD** link for example.
6. Enter the term directly or use the Lookup tool. The Term field refers to the Maxi Term registration you wish to see on the Student Record Summaries. Please note that students must be term activated in order for them to appear on the summary report for that term. Please note if a student is registered in the following Maxi Term this registration will not appear on the summary. For example if you enter the term as 2187 (Fall 2018) the summary will not display 2181 (Winter 2018). The summary will only display up to 2187 (Fall 2018). Click the **desired term**.
7. On Student Record Summary for this example the selection criteria will be Criteria Based. Click the **Look up Primary Program** button.

8. Select the applicable Primary Program (e.g. ARBCH Arts Bachelor). This will produce Student Record Summaries for all students within the primary program selected who are term activated for the specified Term. **Important:** The criteria are solely based on the Primary Program. If a student is in a joint degree the batch process may not retrieve their record if the desired program is not listed. Click the [ARBCH](#) link.



Look Up Primary Program

Search by: Academic Program begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-75 of 75 Last

Academic Program	Description	Short Description	Academic Group
2PRG	[...]	[...]	RO
AR2PG	Arts Bachelor	ARBCH	AR
ARBCH	Arts Bachelor	ARBCH	AR
AREXG	Faculty of Arts	AREXG	AR
CCBCH	Communication & Culture Bach	CCBCH	CC
CCVIS	Comm & Culture Visiting	CCVIS	CC
ED2PG	Education Bachelor	EDBCH	ED
EDBCH	Education Bachelor	EDBCH	ED
EDDIP	Education Diploma	EDDIP	ED
EN2PG	Schulich Sch of EN Bachelor	ENBCH	EN
ENBCH	Schulich Sch of EN Bachelor	ENBCH	EN
ENDIP	Schulich School of EN Diploma	ENDIP	EN
ENEXG	Schulich School of Engineering	ENEXG	EN
ENSPC	Schulich School of EN Special	ENSPC	EN
ENVIS	Schulich School of EN Visiting	ENVIS	EN
EVEXC	Environmental Design Exchange	EVEXC	EV
EVMTH	Environmental Design Mstr Thes	EVMTH	EV
EVSPT	Environmental Design Spec Thes	EVSPT	EV

9. Click the [Look up Degree Stream Plan](#) button.



10. The Degree Stream Plan is a very specific criterion. If entering BA-DEG this will not include BA-H-DEG; no results will be included for students with a Bachelor of Arts Honours Degrees, only regular Bachelor of Arts will be included. For this example select BCC-DEG. Click the **BCC-DEG** link.

Look Up Degree Stream Plan x

[Help](#)

Search by: Academic Plan begins with

Look Up
Cancel
Advanced Lookup

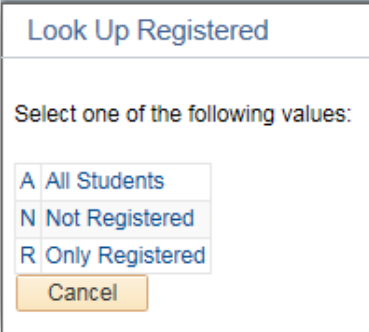
Search Results

View 100 First ◀ 1-162 of 162 ▶ Last

Academic Plan	Description
BA-DEG	Bachelor of Arts
BA-DEG2	Bachelor of Arts
BA-H-DEG	Bachelor of Arts - Honours
BA-H-DEG2	Bachelor of Arts - Honours
BA15-DEG	Bachelor of Arts (15)
BA15-H-DEG	Bachelor of Arts - Honours(15)
BACCS-DEG	Bach of Accounting Science
BC-ACH-DEG	Adult Commnity & Higher Educ
BC-ART-DEG	Art Therapy
BC-CCL-DEG	Career Counselling
BC-CTL-DEG	Curriculum Teaching & Learn
BC-CTX-DEG	Educational Contexts
BC-EPV-DEG	Energy Policy and the Enviro
BC-EV-DEG	Energy and the Environment
BC-ISE-DEG	Interpretative Studies in Educ
BC-LED-DEG	Educational Leadership
BC-PCS-DEG	Counselling Psychology
BC-SCS-DEG	School Counselling
BC-TEC-DEG	Educational Technology
BC-TEL-DEG	Teaching English /2nd Language
BCBL-DEG	Post Bac Cert in B & L Heritge
BCC-DEG	Bach of Communication and Cult
BCDS-DEG	Post B Crd-Dgn Smart/Secure Cm
BCERT-DEG	Post Bachelor's Cert
BCMS-DEG	Bachelor of Comm and Media Std

11. If desired, you may also select the applicable **Academic Plan** (not selected for this example).

12. Click the **Look up Registered** button. Registered allows the option to select A (All Students), N (Not Registered) or R (Only Registered). R will not retrieve student records if a student has withdrawn from all courses in the specified term. All students is the default so no change is required.



Look Up Registered

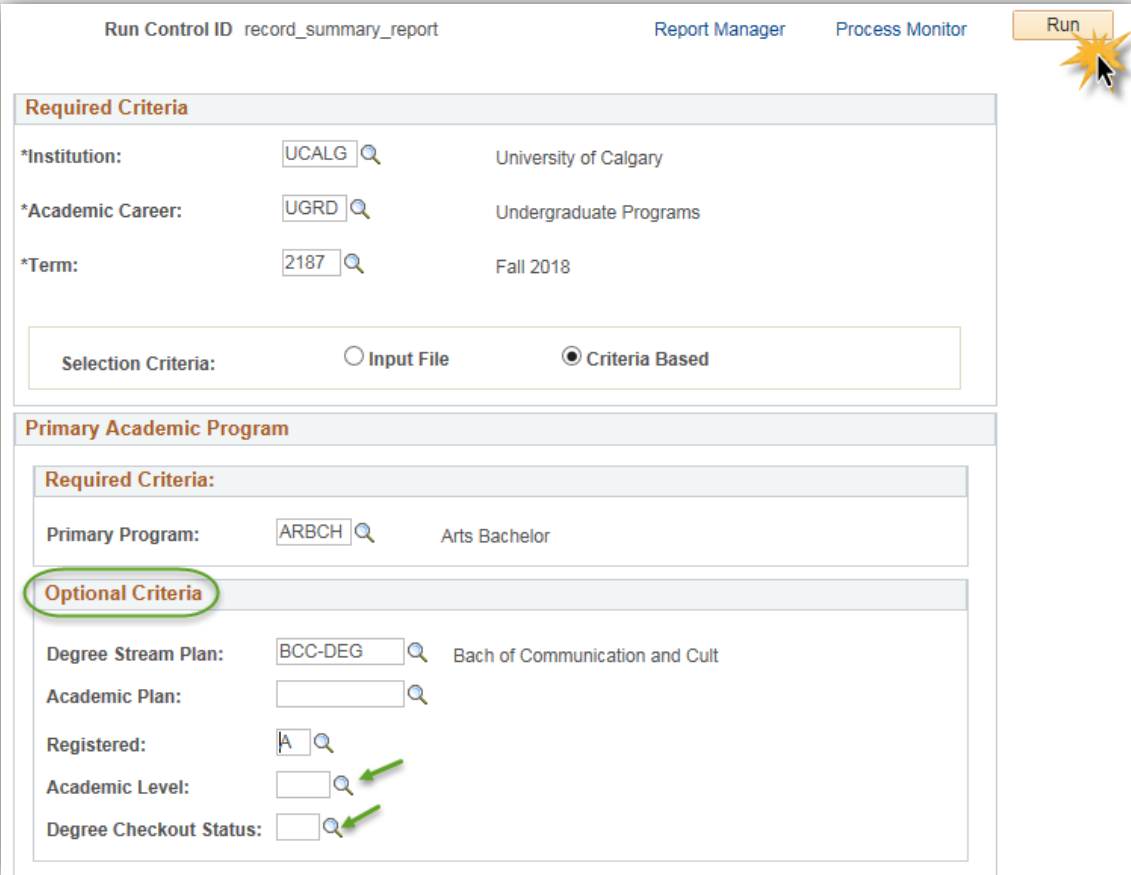
Select one of the following values:

- A All Students
- N Not Registered
- R Only Registered

Cancel

13. You may further define the optional criteria with Academic Level and Degree Checkout Status. This criterion will include students according to their status in the graduation process; Applied for Graduation; Denied; Withdrawn, Pending Transfer, Courses, etc. Click the **Run** button.

Run



Run Control ID record_summary_report Report Manager Process Monitor Run

Required Criteria

*Institution: UCALG University of Calgary

*Academic Career: UGRD Undergraduate Programs

*Term: 2187 Fall 2018

Selection Criteria: Input File Criteria Based

Primary Academic Program

Required Criteria:

Primary Program: ARBCH Arts Bachelor

Optional Criteria

Degree Stream Plan: BCC-DEG Bach of Communication and Cult

Academic Plan: []

Registered: A

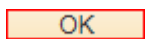
Academic Level: []

Degree Checkout Status: []

- On Process Scheduler Request, the format can be changed. Click the **Format** list.
- You can select CSV, to download to excel, or PDF. For this example select PDF. Click the **PDF** list item.



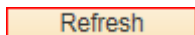
- Click the **OK** button.



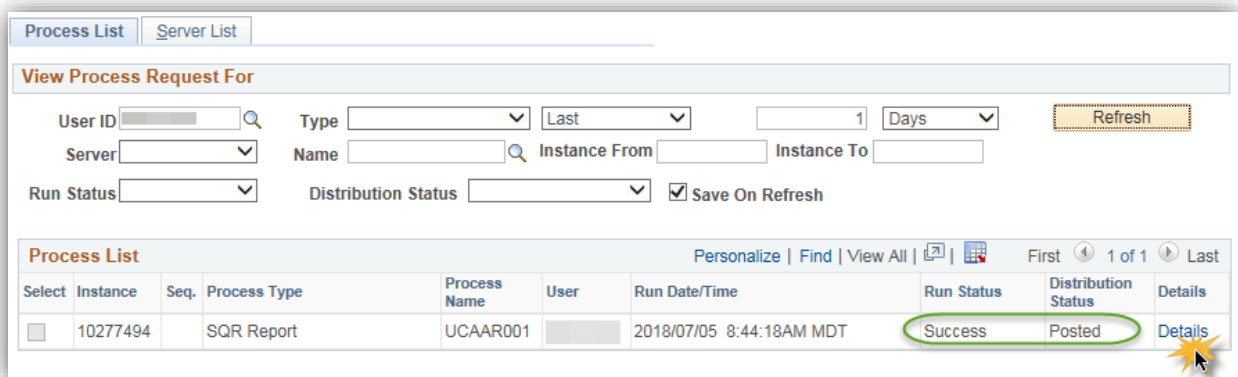
- The Process Monitor will be queued to begin the batch process (e.g. Process Instance Number displays). Click the **Process Monitor** link.



- The Process List displays the batch process in Queued status. This process may take several minutes to run. Pressing Refresh will display the progress of the batch process which will be Queued, Processing, Success and Posted. Click the **Refresh** button.



- Once the batch process indicates Success and Posted the Details link can be clicked. Click the **Details** link.

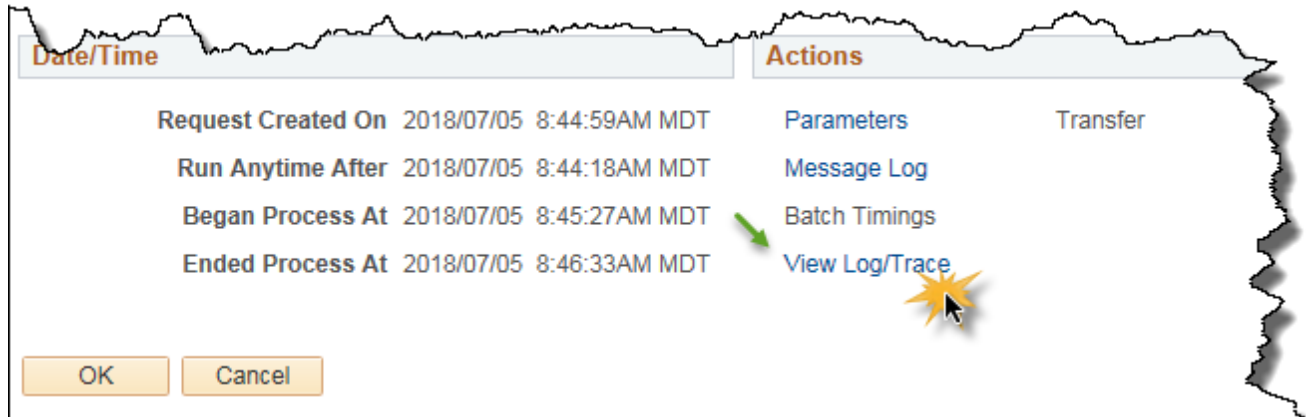


Student Record Summary Report

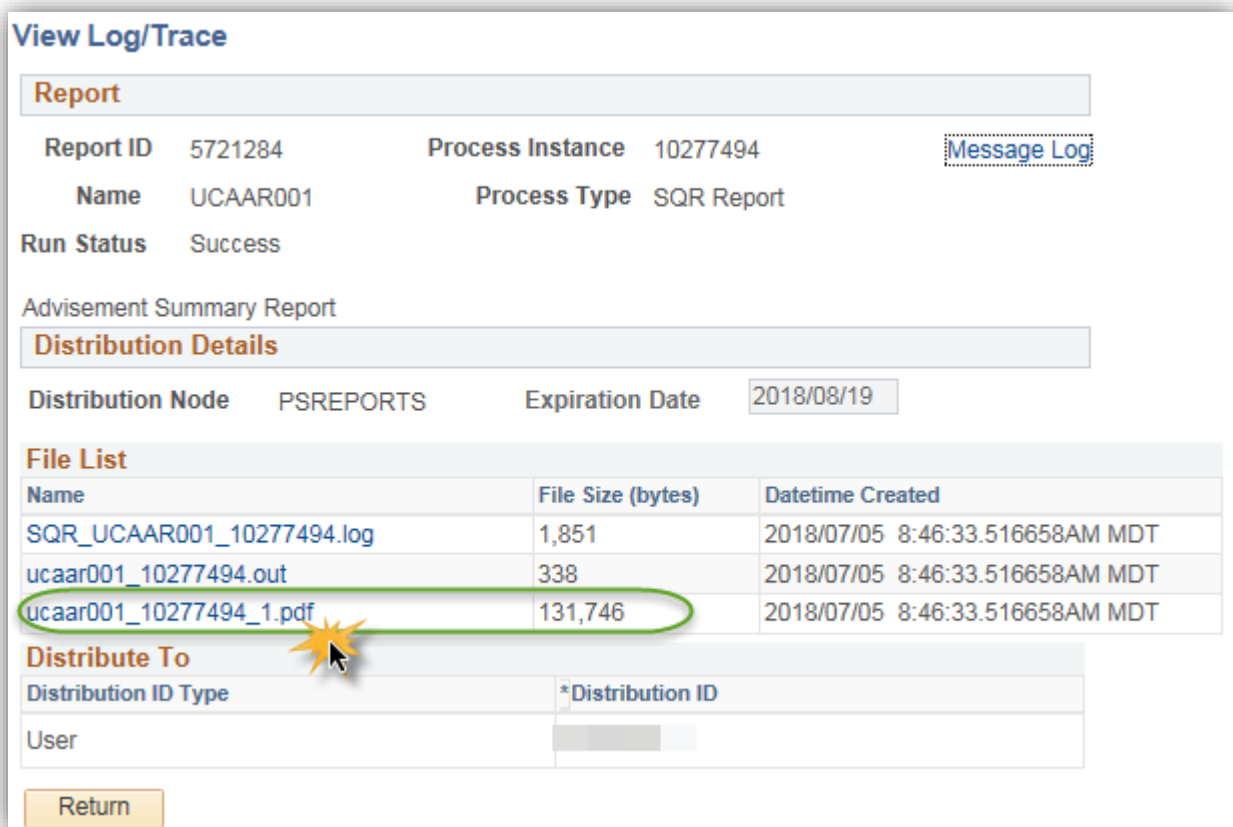
SA – Academic Advisement



20. On Process Detail, click the [View Log/Trace](#) link.



21. On View Log/Trace the File List will display the .pdf format. Click the [.pdf](#) link.



22. The .PDF displays the Student Record Summary based on the selection criteria entered. *Note: Information has been removed for FOIP reasons.*

Student Record Summary - Undergraduate Programs
(Not an Official Transcript) Printed: 2018-07-05 08:45:53 (Term 2187)

ID: [REDACTED] Email Address: [REDACTED]
 Name: [REDACTED] Current Address: [REDACTED]
 Phone: [REDACTED]

----- Current Program -----

Fall 2018
 Arts Bachelor
 Degree: Bach of Communication and Cult
 Communications Studies (Minor)

Winter 2019
 Arts Bachelor
 Degree: Bach of Communication and Cult
 Communications Studies (Minor)

----- Important Comments -----

----- Term Totals -----				----- Academic Standing -----					
Term	YR	Primary Program	Attempted Units/FCEs	Term GPA	Standing	Since Last Assess		Course	
						GPA	Units /FCE	GPA	Units /FCE
F12	1	OSCND	9.00 1.5	[REDACTED]					
W13	1	OSCND	6.00 1.0	[REDACTED]					
F13	1	OSCND	9.00 1.5	[REDACTED]					
W14	1	OSCND	9.00 1.5	[REDACTED]					
F14	2	ARBCH	9.00 1.5	[REDACTED]	Continues in Good Standing	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
W15	2	ARBCH	9.00 1.5	[REDACTED]	Continues in Good Standing	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
F15	2	ARBCH	9.00 1.5	[REDACTED]	Continues in Good Standing	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
W16	2	ARBCH	9.00 1.5	[REDACTED]	Continues in Good Standing	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
F16	3	ARBCH	9.00 1.5	[REDACTED]	Continues in Good Standing	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
W17	3	ARBCH	12.00 2.0	[REDACTED]	Continues in Good Standing	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
F17	3	ARBCH	9.00 1.5	[REDACTED]					
W18	4	ARBCH	6.00 1.0	[REDACTED]					

----- Course Summary -----

Total JR	42.00/	7.00	Total D	12.00	Total W	6.00	Course Groupings Based On:
				Total EW	0.00		

Student Record Summary Report

SA – Academic Advisement

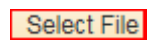


Input File:

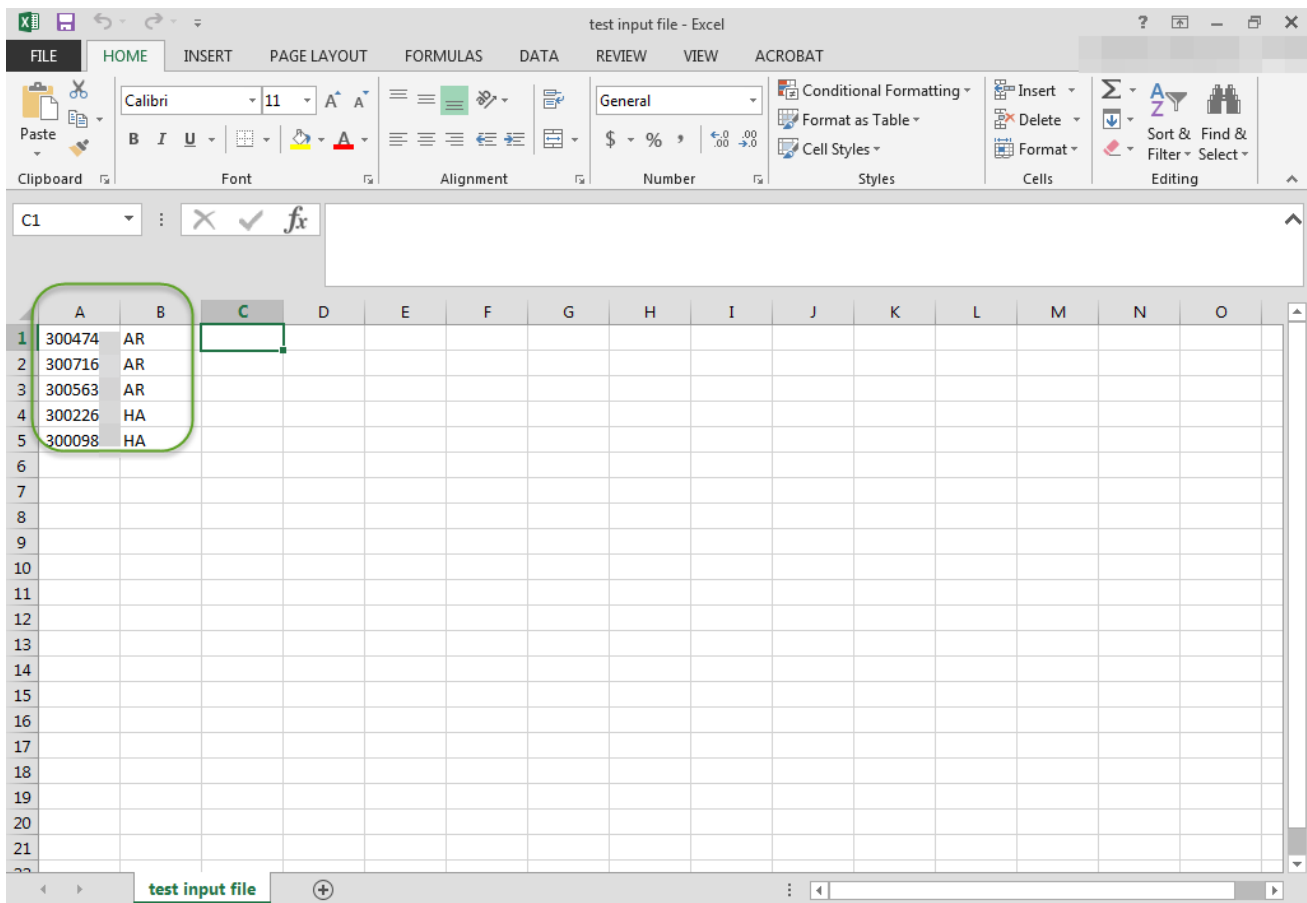
1. For this example the selection criteria will be **Input File**. As per the Criteria Based process, enter the Required Criteria; Academic Career and Term. Click the **Input File** radio button option.

A screenshot of the "Student Record Summary Report" web application. The interface shows a header with the title "Student Record Summary Report" and a sub-header "Student Record Summary". Below the header, there is a "Run Control ID" field with the value "input_file_summary_report", and buttons for "Report Manager", "Process Monitor", and "Run". The main section is titled "Required Criteria" and contains three rows of input fields: "*Institution:" with the value "UCALG" and "University of Calgary"; "*Academic Career:" with the value "UGRD" and "Undergraduate Programs"; and "*Term:" with the value "2187" and "Fall 2018". Below these fields, there is a "Selection Criteria:" section with two radio buttons: "Input File" (which is selected) and "Criteria Based". The bottom of the screenshot shows a "Primary Academic Program" field, which is partially obscured by a torn paper effect.

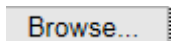
2. Click the **Select File** button.



3. To use the **Input File** option create your list of students in the correct input file format (e.g. Excel). This format may be identified by the file extension .CSV (Comma Separated Values or comma delimited). *For FOIP reasons some information has been removed.*
 - In Excel ensure each cell containing ID numbers is formatted as text so the leading zeros are not removed.
 - Ensure the columns have no headings and there is no extra information in the spreadsheet.
 - Save the file by clicking on **Save As** in the File menu and selecting CSV (Comma delimited) as the file type.

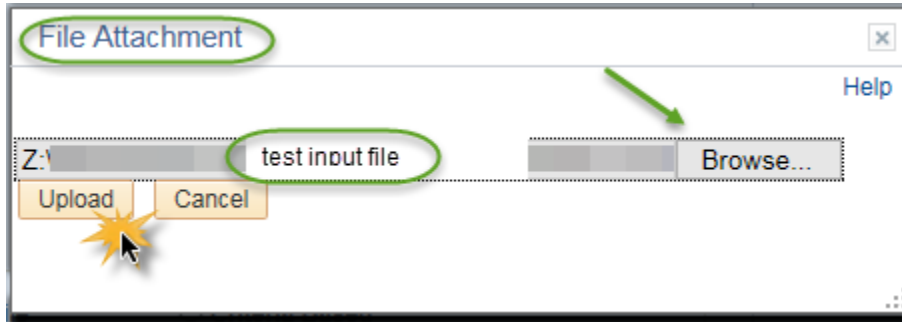


4. Click the **Browse** button.



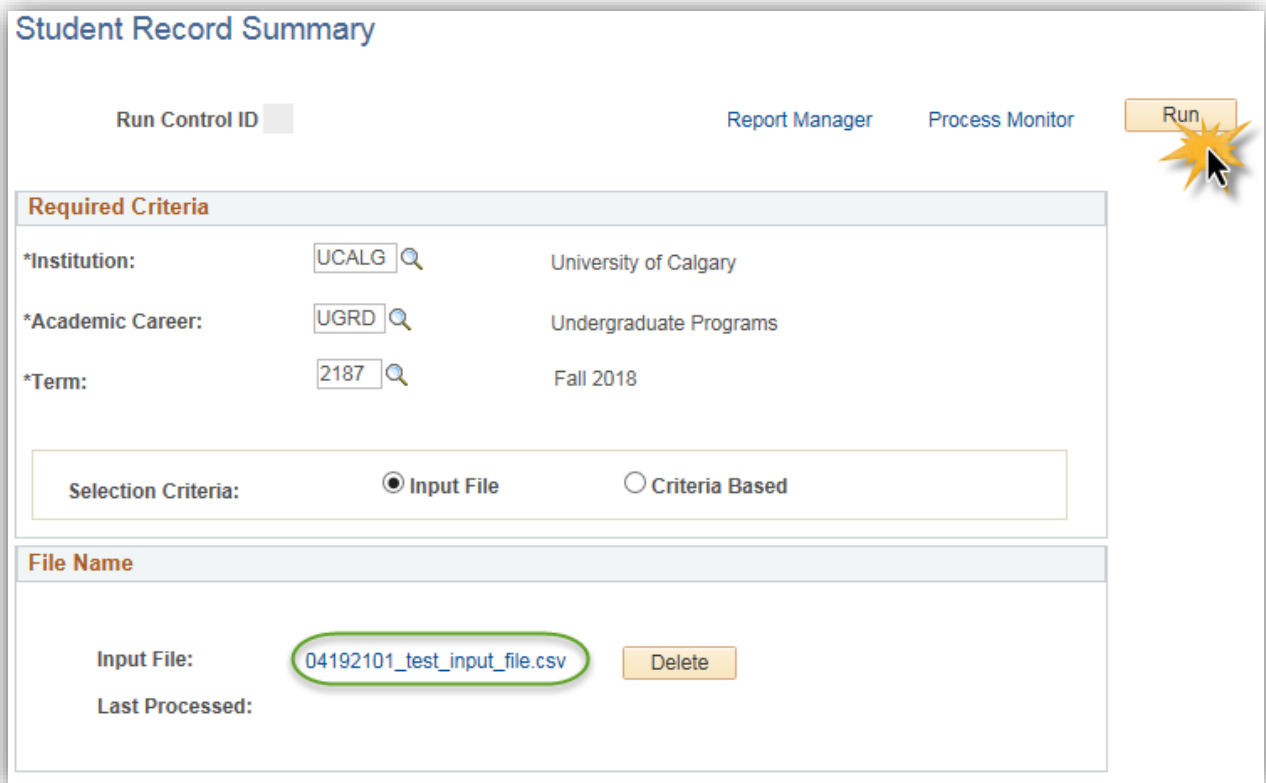
5. Once you browse for the desired .CSV file, upload it. Click the **Upload** button.

Upload



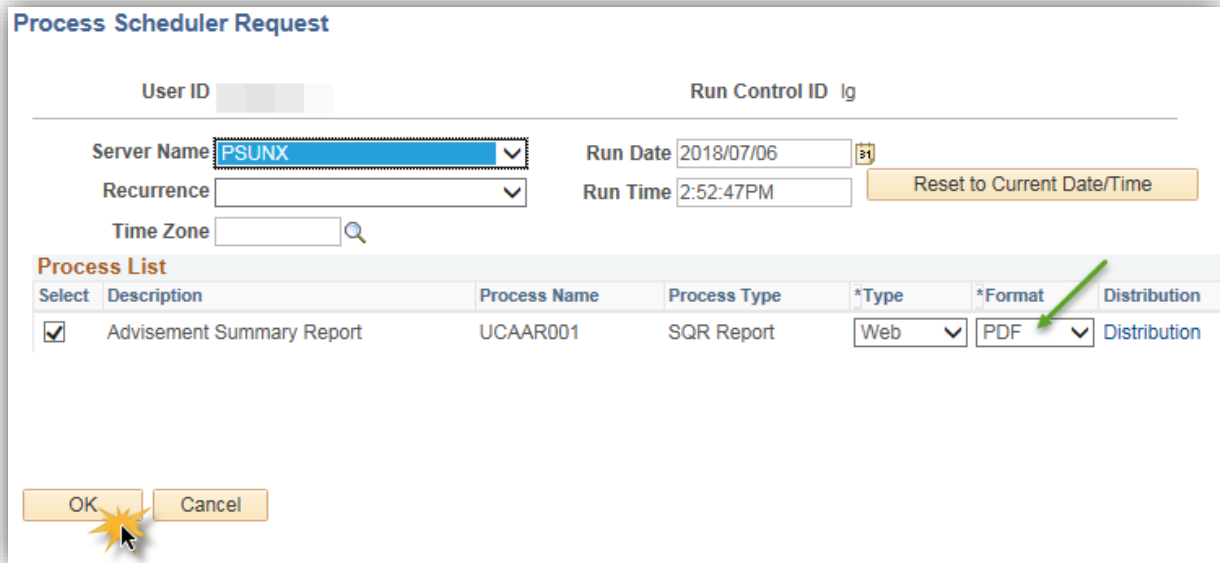
6. Note the name of the Input File displays (e.g. test input file.csv). Click the **Run** button.

Run



7. On Process Scheduler Request, the Format should be .PDF Click the **OK** button.

OK



Process Scheduler Request

User ID Run Control ID

Server Name Run Date

Recurrence Run Time

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Advisement Summary Report	UCAAR001	SQR Report	Web	PDF	Distribution

8. Once the process request is submitted the Process instance number displays. Click the **Process Monitor** link.

Process Monitor

9. This process may take some time to run, especially if your list of students is quite long. Therefore you may need to refresh the screen periodically until the Run Status reads Success and the Distribution Status reads Posted. Click the **Refresh** button.

Refresh

10. Click the **Details** link.

Details

11. Click the **View Log/Trace** link.

View Log/Trace

12. Click on the .pdf file.

[ucaar001_10011408_1.pdf](#)

13. The .PDF displays the Student Record Summary based on the selection criteria entered.

End of Procedure.

For the corresponding online learning, consult the Student and Enrolment Services, Student Administration (PeopleSoft Campus Solutions) training website.