Graduation Report (Mass Updates)

SA - Graduation

The following job aid outlines how to update the status of graduation applicants (e.g. Award, Deny, Pending, etc.) for multiple students rather than individually modifying their records. There are two steps to this process;

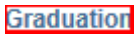
Step 1 - Selecting a Population

Step 2 - Mass Updating a population of students using the Graduation Report process.

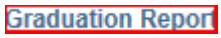
Step 1: Selecting a Population

1. Click the **Records and Enrollment** link.

2. Click the **Graduation** link.

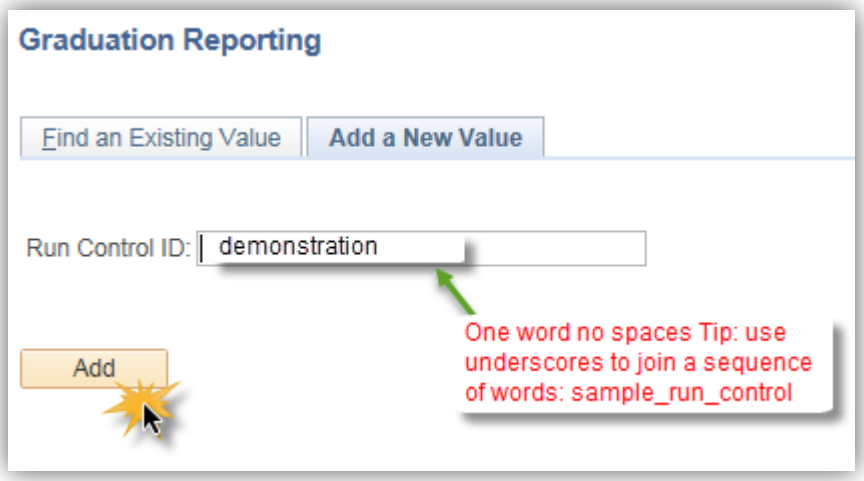


3. Click the **Graduation Report** link.

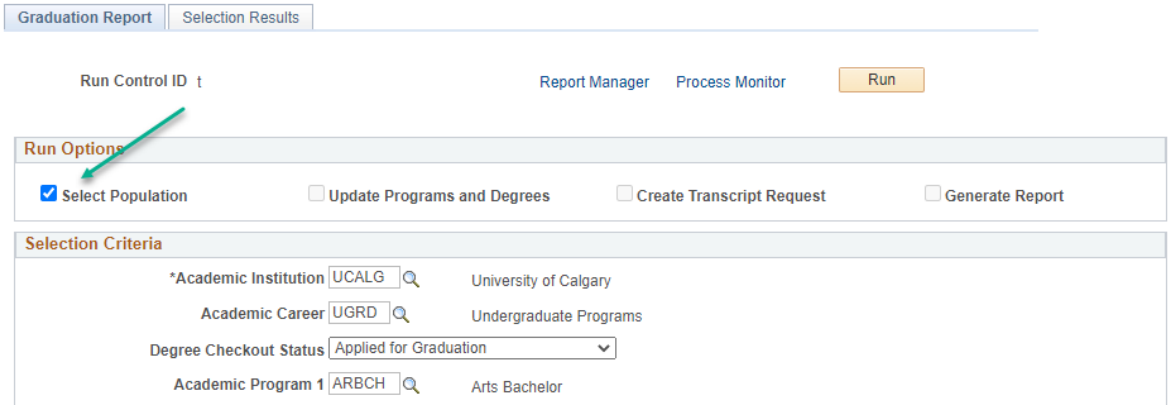


4. The first time running the graduation report select **Add a New Value**. If you have already created a new value, press Search or Enter. Click the **Add a New Value** tab.

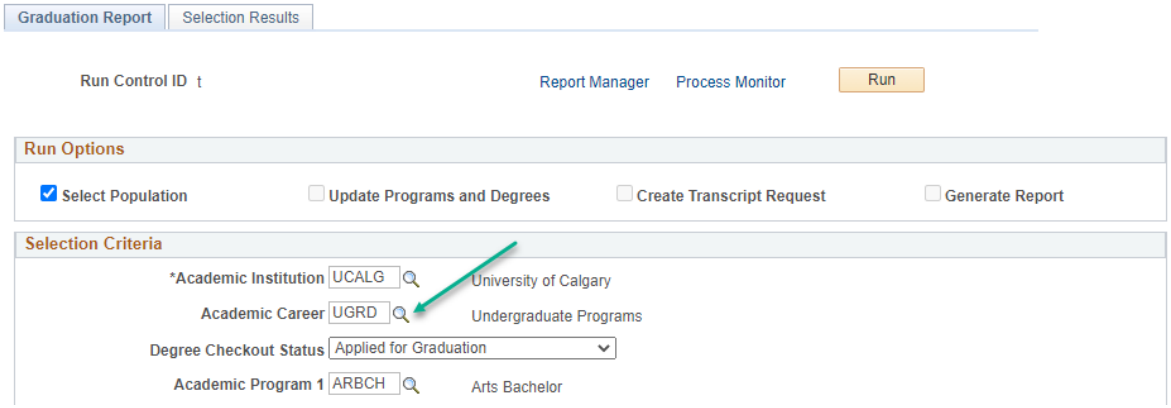
5. The Run Control ID must be one word with no spaces. Click the **Add** button.

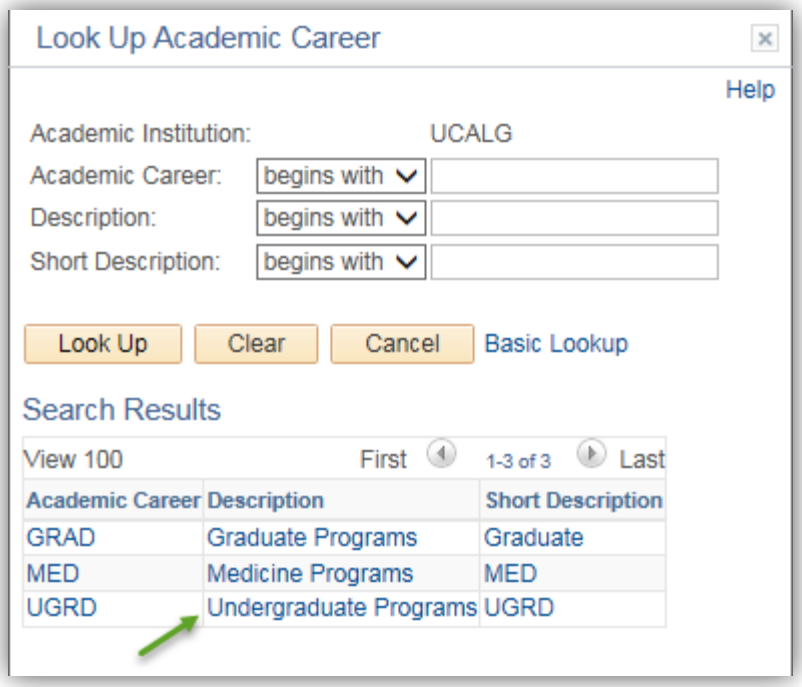


6. The first step in generating a graduation report is to select the population. Ensure the **Select Population** checkbox is selected. Click **Select Population**.

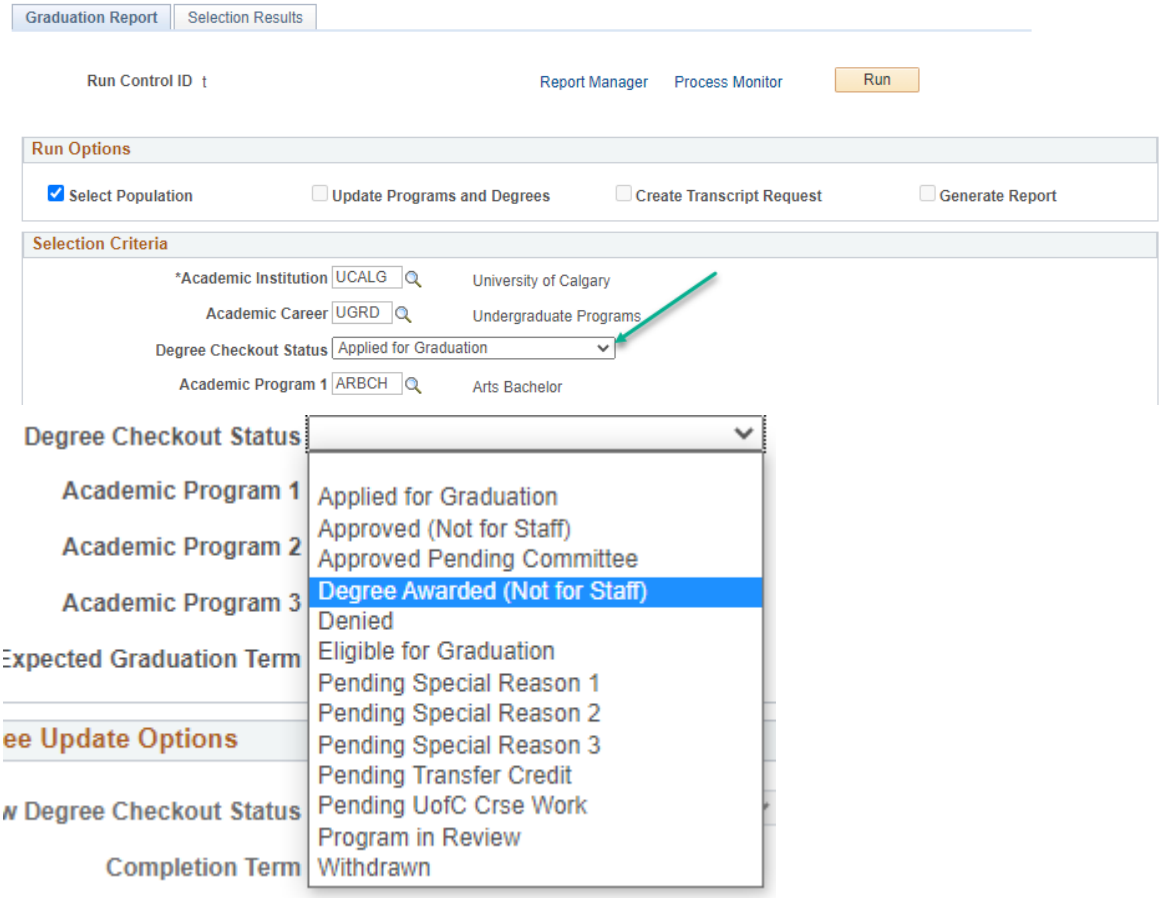


7. Click the **Look up Academic Career** button and select the applicable academic career (GRAD, MED or UGRD). For example, click the **UGRD** link.





8. Click the **Degree Checkout Status** list and select the appropriate status (e.g. Degree Awarded - to complete students).

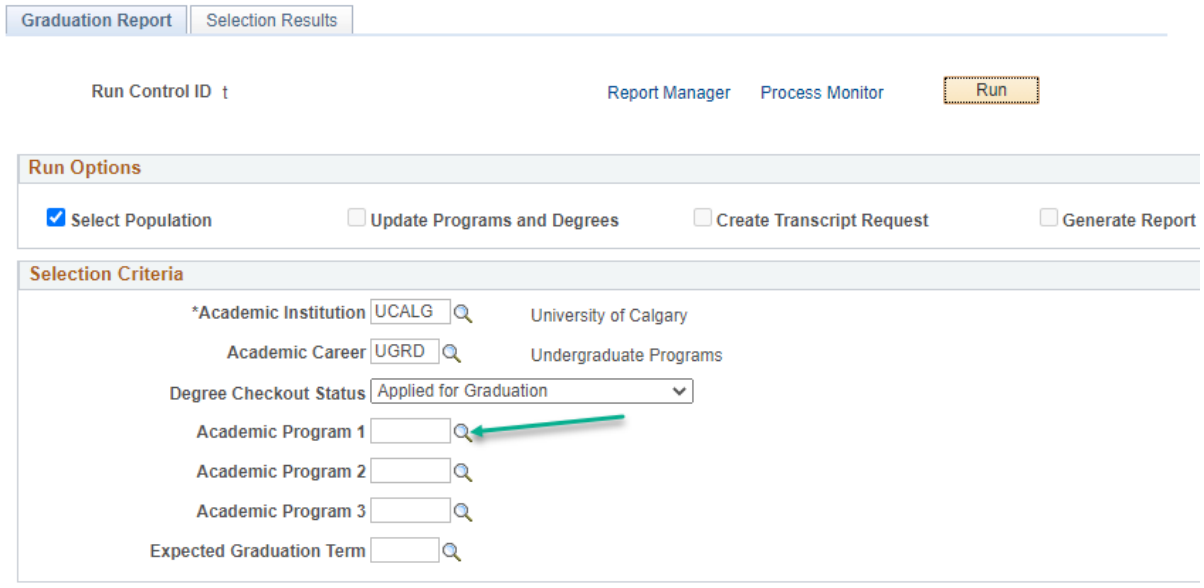


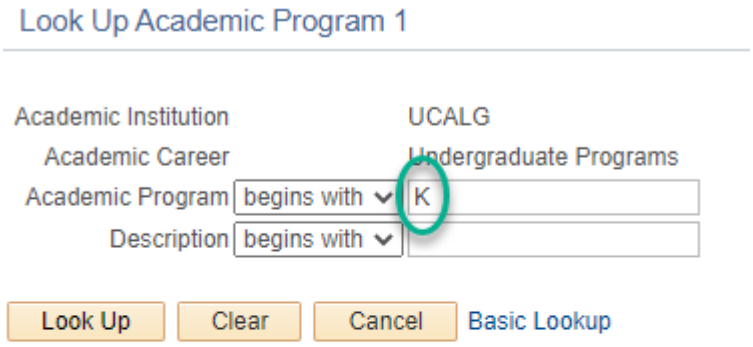
There are several options:

- Applied for Graduation (AG); assigned when the student has submitted an application to graduate
- Approved (Not for Staff); assigned as interim step in application review process
  - N.B. do not apply this criteria when approving an application to graduate; instead use the "Degree Awarded (Not for Staff)" criteria, below.
- Approval Pending Committee; Approved pending committee
- **Degree Awarded** (Not for Staff) (**AW**); select to complete students for graduation
- Denied (DN); assigned by Faculty when it is determined the student has not met their degree requirements
- Eligible for Graduation **(Not used)**
- Pending Special Reason 1 (P1); Pending special reason (Faculty specific)
- Pending Special Reason 2 (P2); Pending special reason (Faculty specific)
- Pending Special Reason 3 (P3); Pending special reason (Faculty specific)
- Pending Transfer Credit : Pending transfer credit
- Pending UofC Crse Work; Pending UofC course work

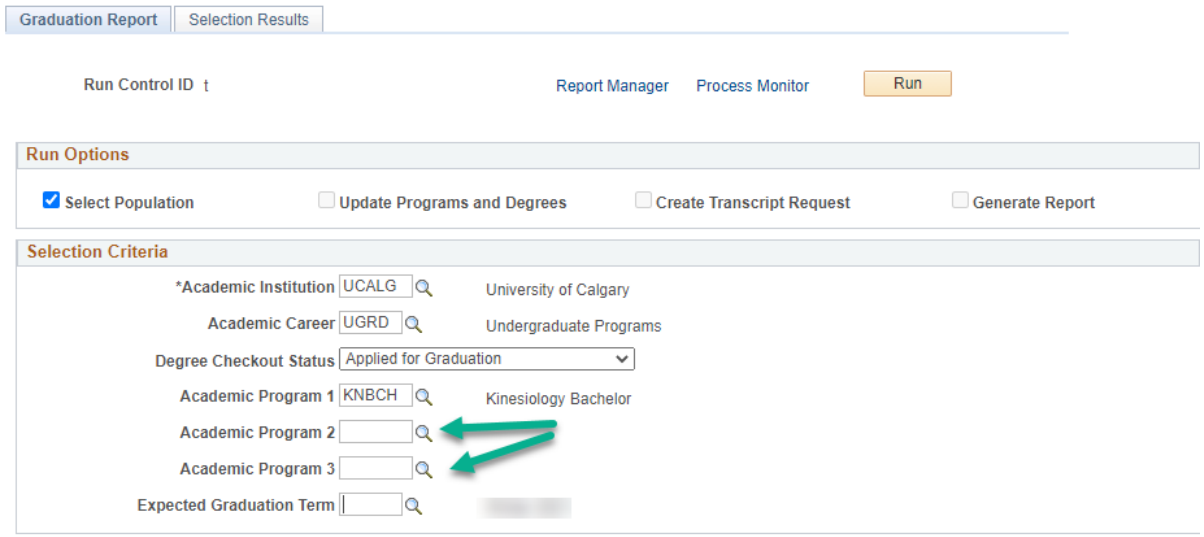
- Program in Review (IR);Program in review
- Withdrawn (WD); assigned when student withdraws their application

9. Click the **Look up Academic Program 1** button and select the applicable Academic Program. **Tip**: Enter the first letter of the program and press enter. For example enter "K" for Kinesiology Bachelor. Click on the KNBCH – Kinesiology Bachelor.

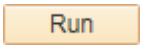


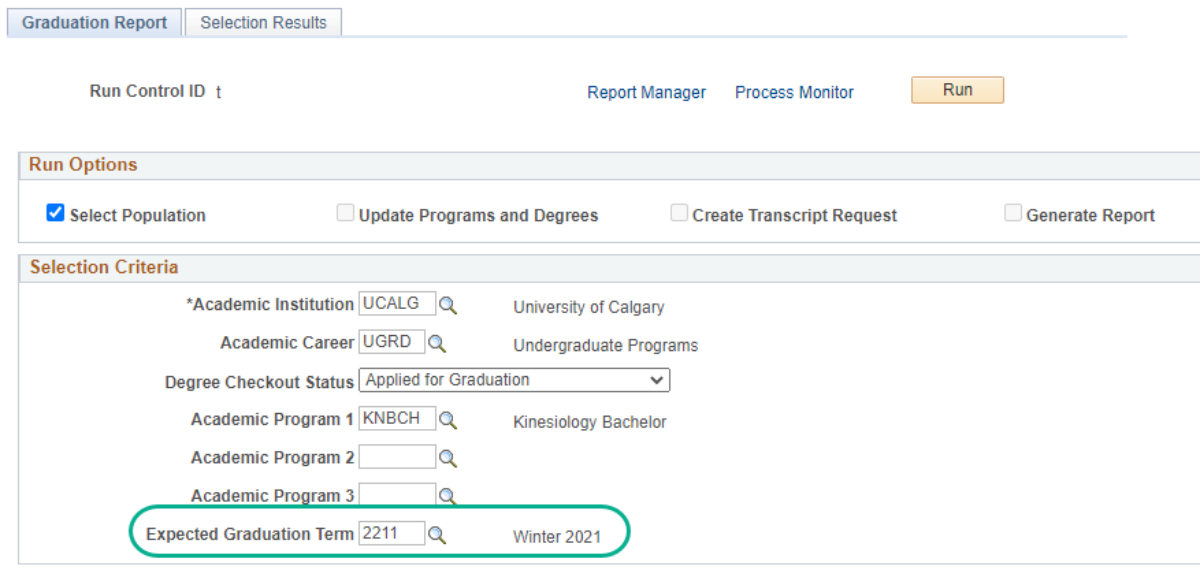


10. You may enter up to 3 academic programs if desired.

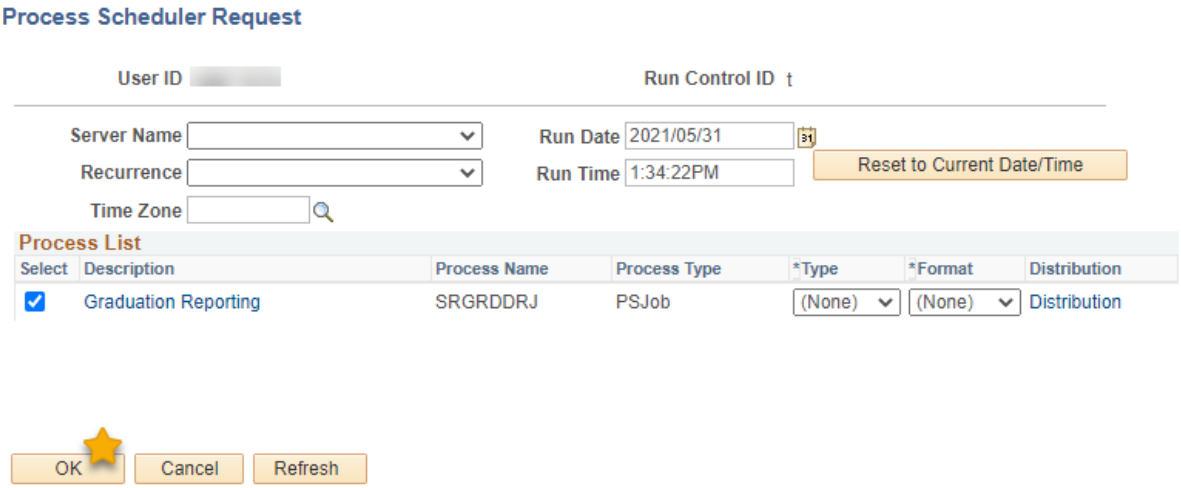


11. Enter the Expected Graduation Term or use the look up tool (e.g. 2211 for Winter 2021). The Completion Term for Spring Graduation must be the prior Fall or Winter Term. The Completion Term for Fall Graduation must be the prior Spring or Summer Term.
Click the **Run** button.

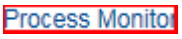


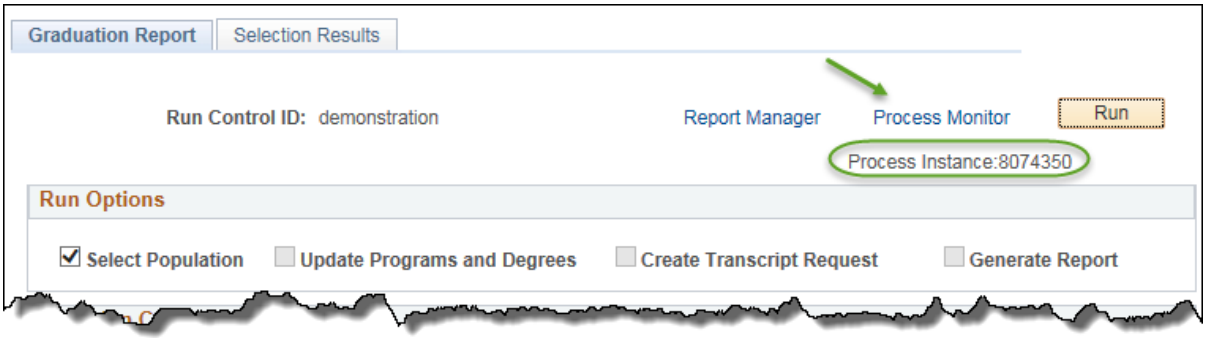


12. **Note:** No other selections need to be entered on the Process Scheduler Request page.
Click the **OK** button.



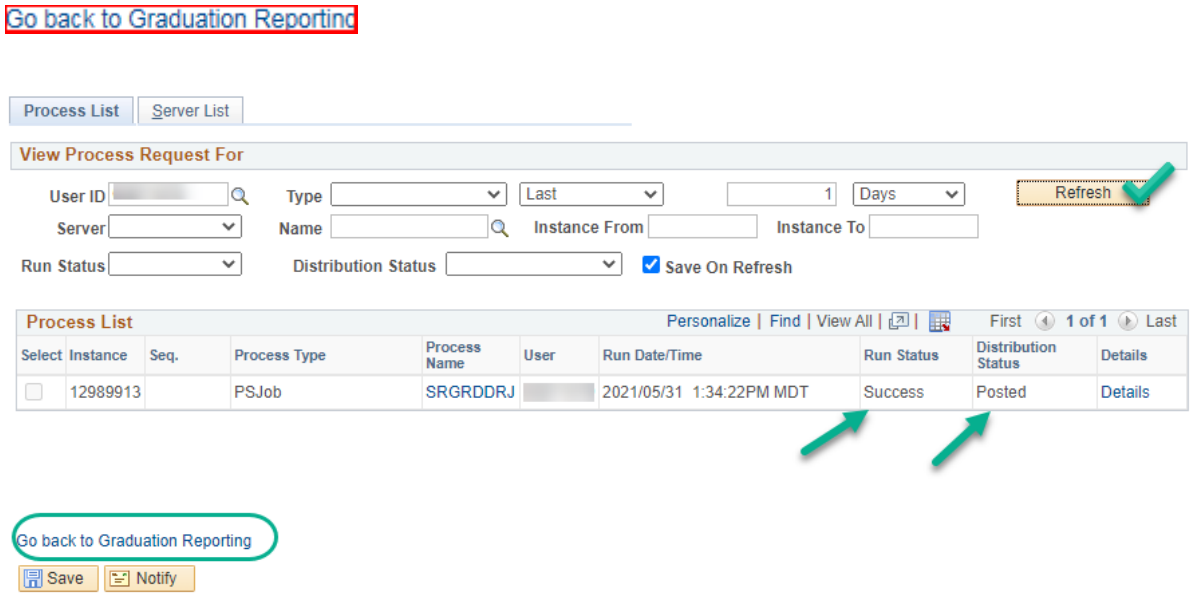
13. A Process Instance number will display indicating the request has been entered.
Click the **Process Monitor** link.



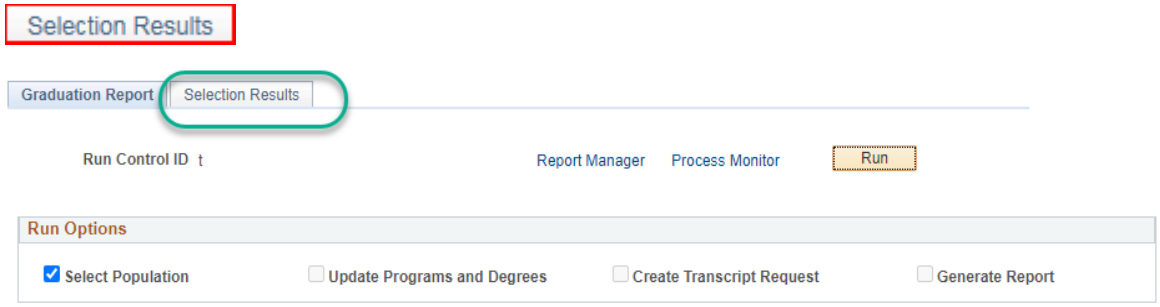


14. The Process List will display the progress of the request (e.g. Processing, Success, Posting and Posted). Clicking the Refresh button will display the progress.
Click the **Refresh** button.

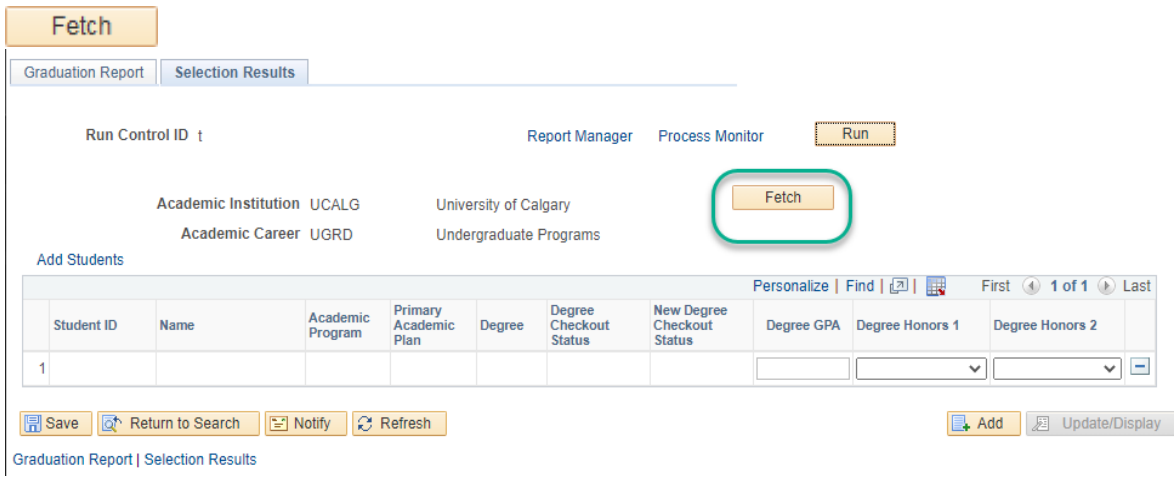
15. The process is complete when the Run Status = Success and Distribution Status = Posted. Click the **Go back to Graduation Reporting** link.



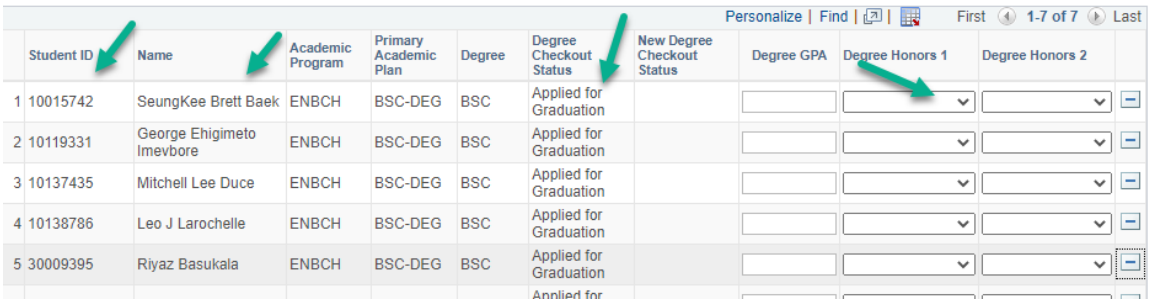
16. Click the **Selection Results** tab.



17. To view a list of students clicking the Fetch button will display them in the grid. Click the **Fetch** button.



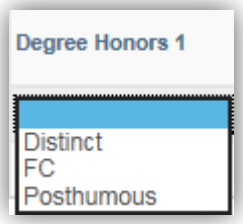
18. A list of students will be displayed based on the initial search criteria entered on the Graduation Report tab.



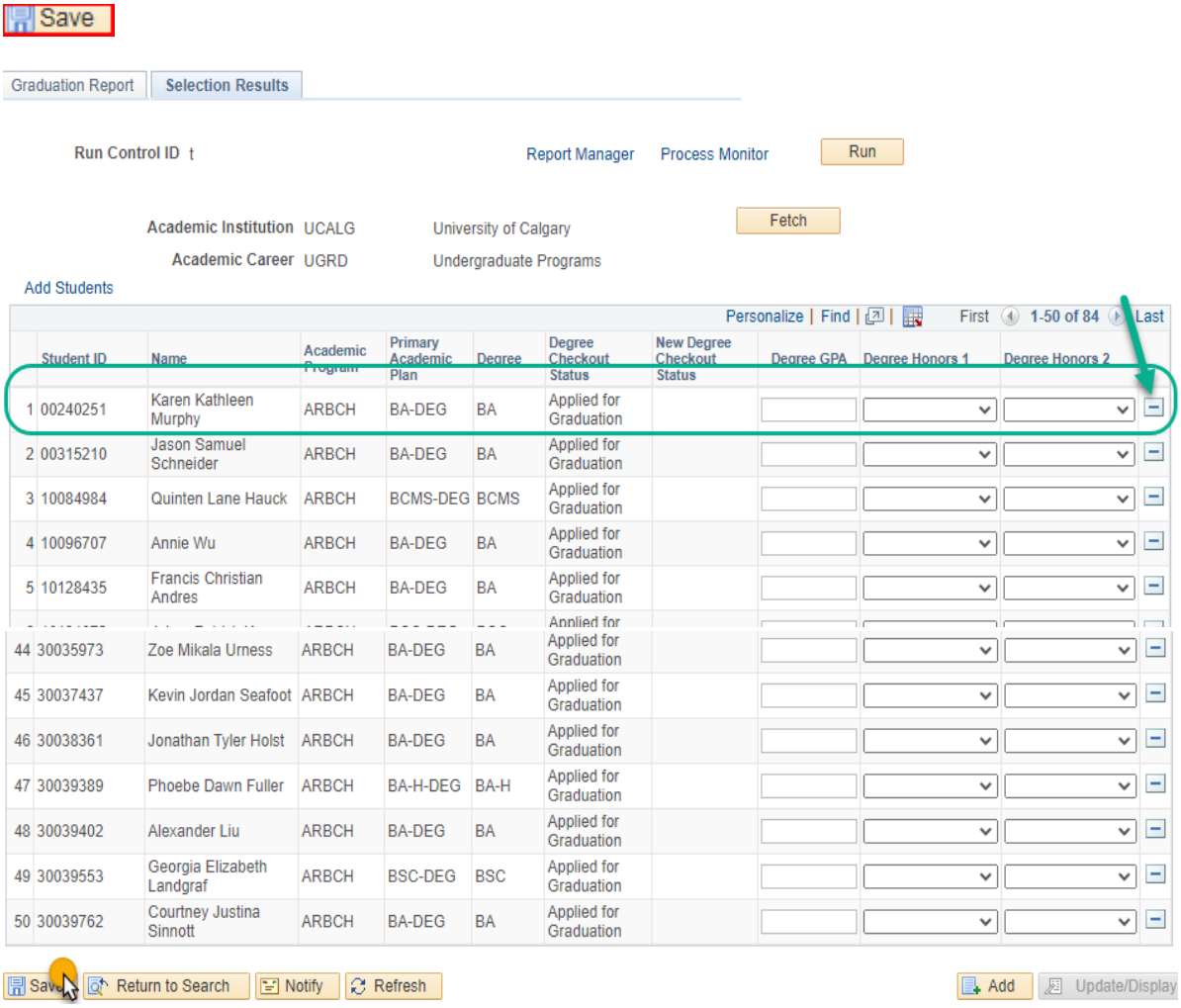
Personalize | Find | First 1-7 of 7 Last

	Student ID	Name	Academic Program	Primary Academic Plan	Degree	Degree Checkout Status	New Degree Checkout Status	Degree GPA	Degree Honors 1	Degree Honors 2
1	10015742	SeungKee Brett Baek	ENBCH	BSC-DEG	BSC	Applied for Graduation				
2	10119331	George Ehigimeto Imevbore	ENBCH	BSC-DEG	BSC	Applied for Graduation				
3	10137435	Mitchell Lee Duce	ENBCH	BSC-DEG	BSC	Applied for Graduation				
4	10138786	Leo J Larochelle	ENBCH	BSC-DEG	BSC	Applied for Graduation				
5	30009395	Riyaz Basukala	ENBCH	BSC-DEG	BSC	Applied for Graduation				

19. When completing the selected students programs, you may add Degree Honors to individual students. Select the appropriate Degree Honors option from the drop-down list. Click the **Degree Honors 1** list.

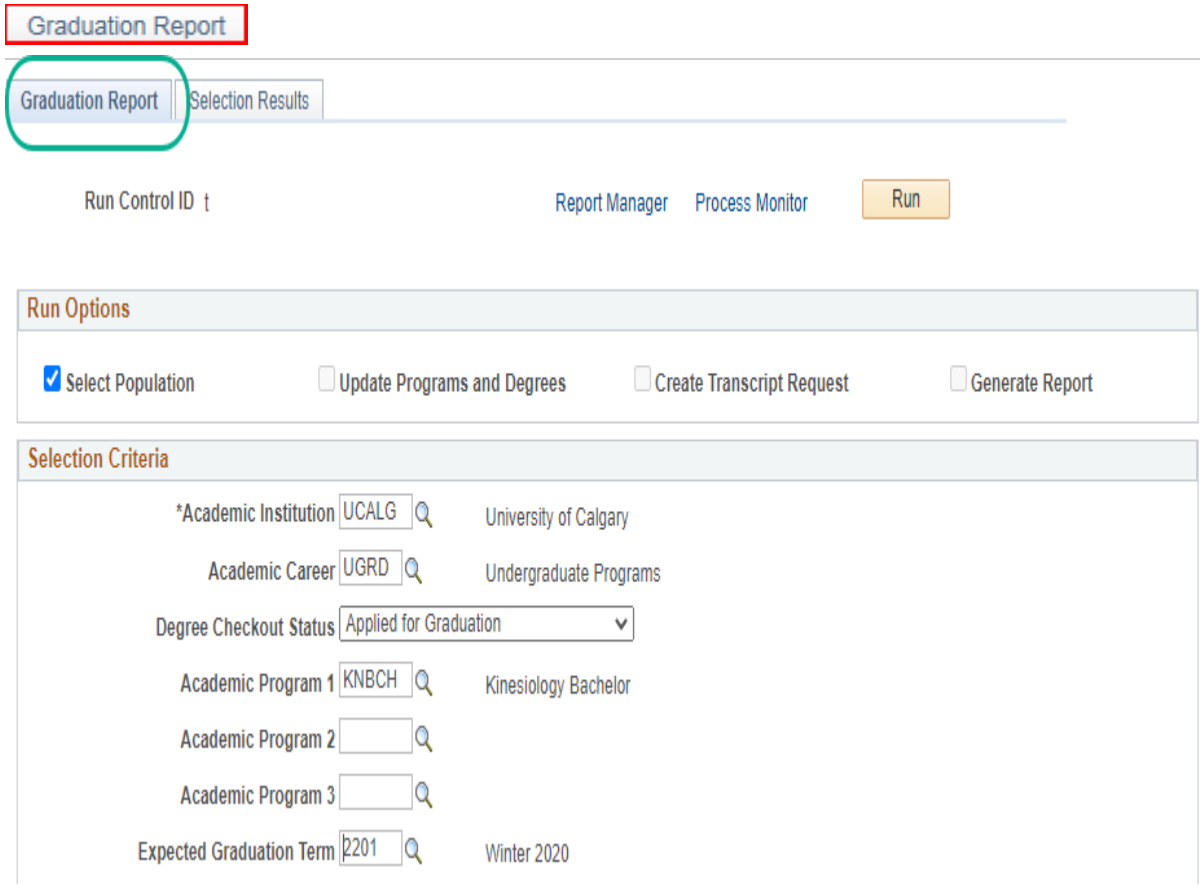


20. If a student has been **Fetched,** that you do not wish to update, remove the student's row by using the minus sign at the end of the row. When completed, click the **Save** button.

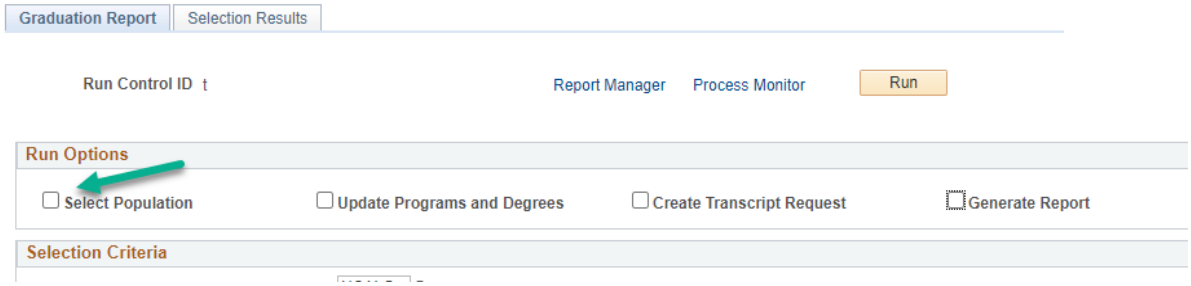


Step 2: Mass Updating a population of students using the Graduation Report

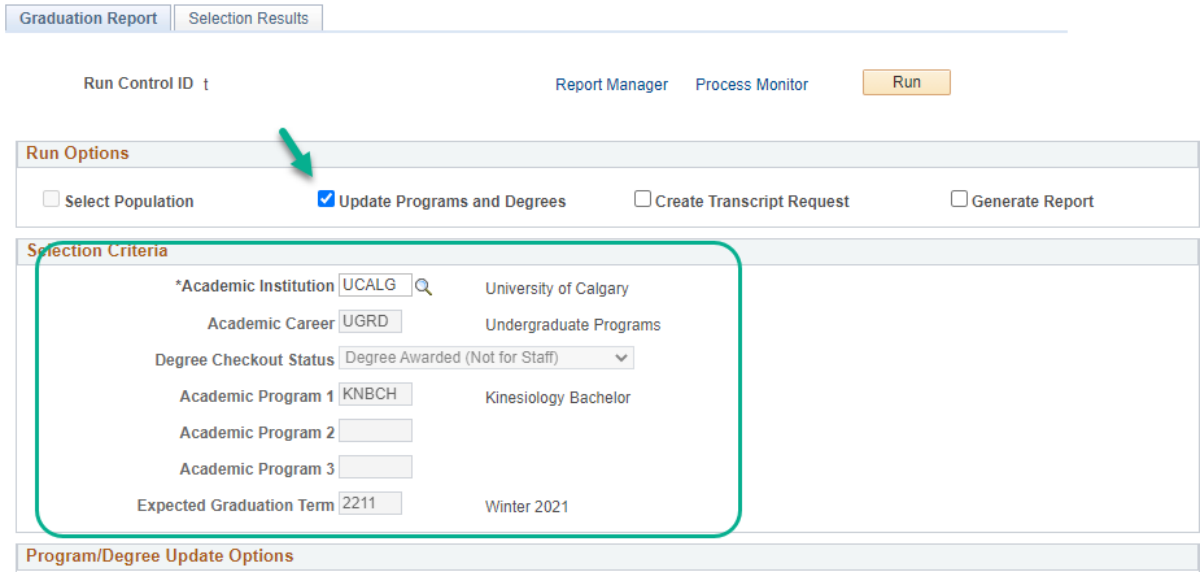
1. The following steps will mass update the fetched students list utilizing the **New Degree Checkout Status** selection option. Click the **Graduation Report** tab.



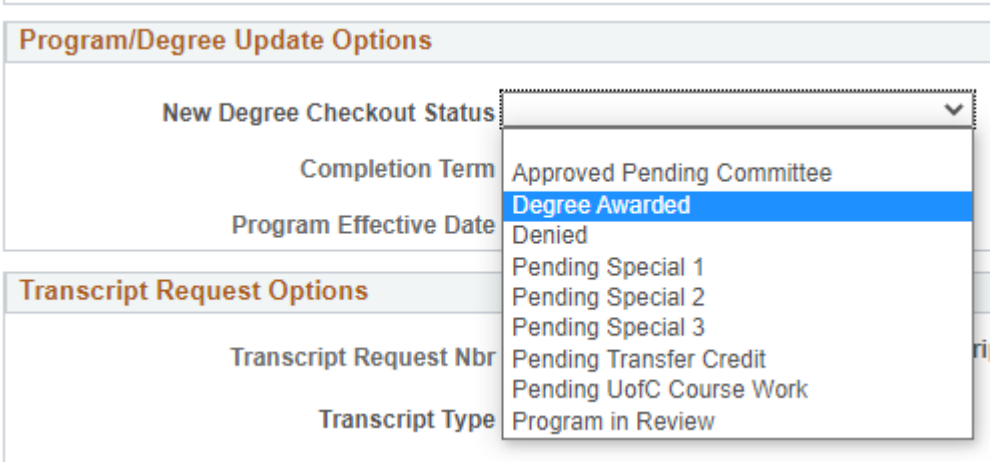
2. In the **Run Options** section de-select the option for **Select Population** by clicking on the **Select Population** option box to remove the check mark (i.e. make the box empty).



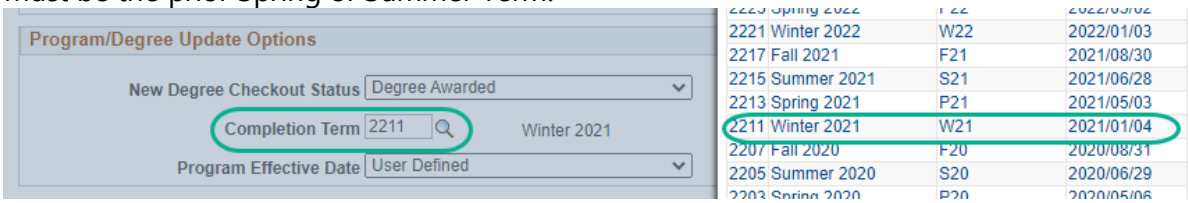
3. Select **Update Programs and Degrees** in order to change the status of the student records. (**Optional:** Create Transcript Request and/or Generate Report may be selected at this point or later)
Click the **Update Programs and Degrees** option box. This will result in the greying out of the **Selection Criteria** area. This will ensure the fetched students list selected will not be altered in error.



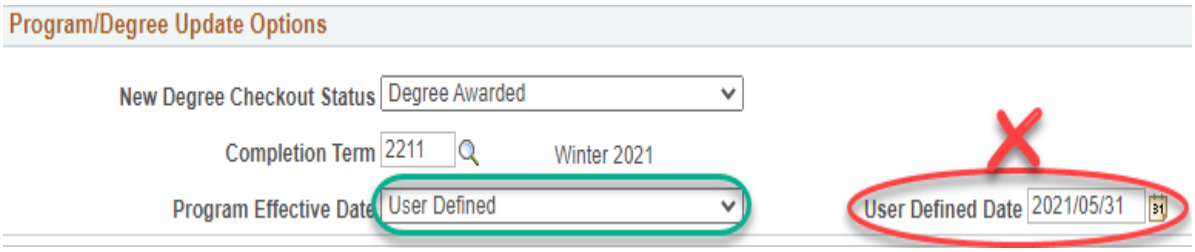
4. In the **Program/Degree Update Options** section, to initiate the mass update of your fetched students list, first select the proper **New Degree Checkout Status.** For your needs you will be fully completing (graduating) students so select **Degree Awarded**. Click the **New Degree Checkout Status** drop down list and select **Degree Awarded.** In addition to this, you also have the option to select a New Degree Checkout Status for a group of students in the case where students are possibly not ready to be completed yet (e.g. Pending some type of review).



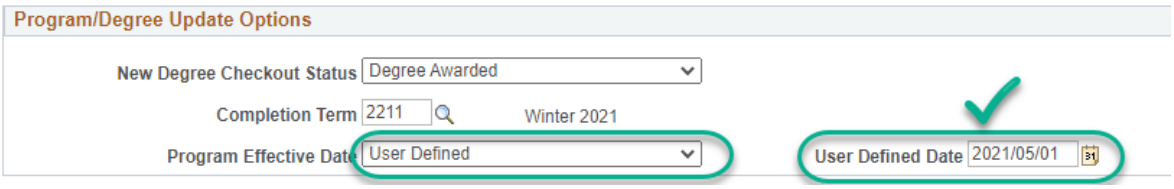
5. Enter the **Completion Term** (e.g. 2211 for Winter 2021). The Completion Term for Spring Graduation must be the prior Fall or Winter Term. The Completion Term for Fall Graduation must be the prior Spring or Summer Term.



6. Click the **Program Effective Date** drop down list. Select **User Defined** from the list of items. The **User Define Date** field will automatically populate the field with the "Confer Date" for the upcoming Convocation. **The User Defined Date must then be changed** to the first day of the term in which the student's conferral occurs (for example, if the student will have their degree conferred to them in the Spring Convocation then the **Effective Date** should be May 1, for Fall Convocation it should be either Jun 20 or Aug 20, and for the Feb conferral it should be Jan 1). **Faculties must be careful not to future date the User Defined Date field** (for example the conferral date for Spring Convocation) as this will result in the student being awarded Completion of Program in the system but it will **not actually generate a parchment for the student**.

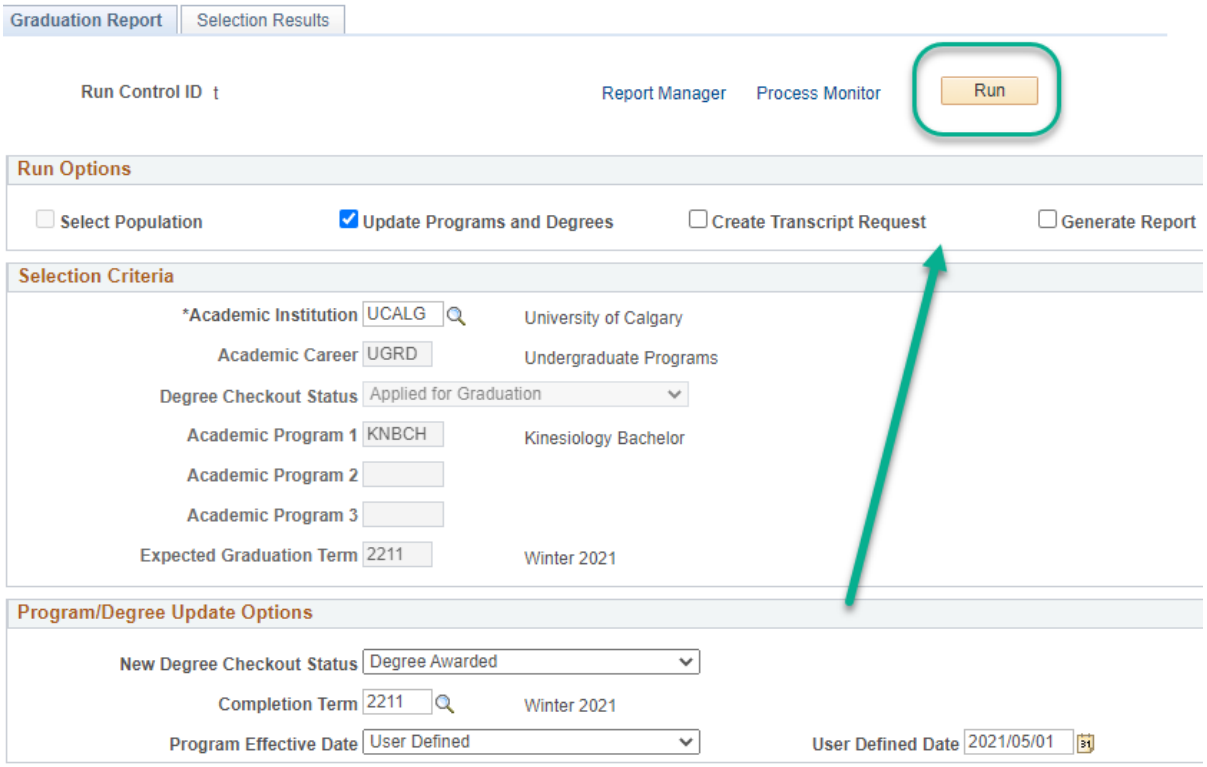


7. Correct the **User Defined Date** field to the appropriate calendar date.



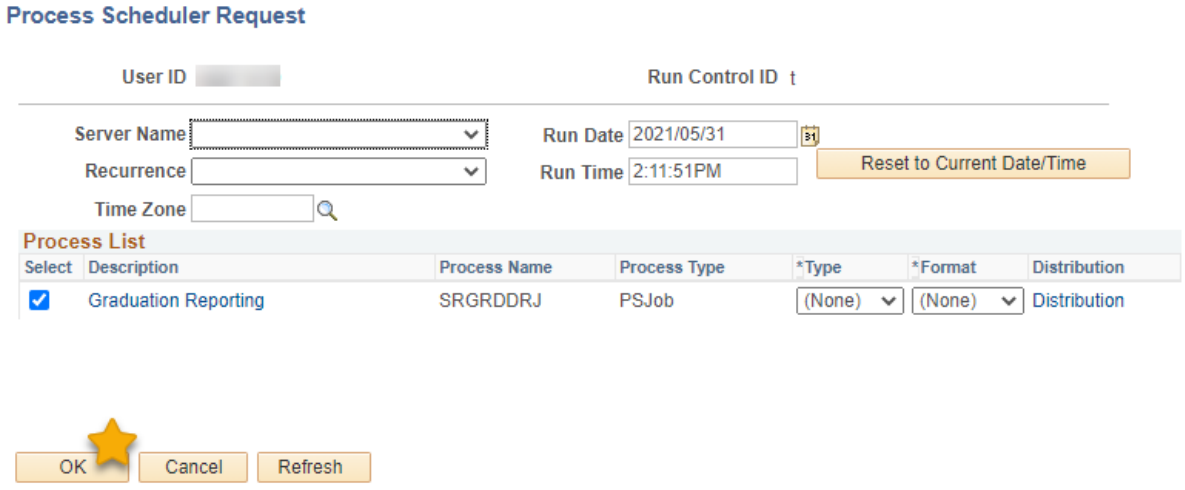
8. When the **Program/Degree Update Options** have been entered, Run the process. Click the **Run** button.

Run

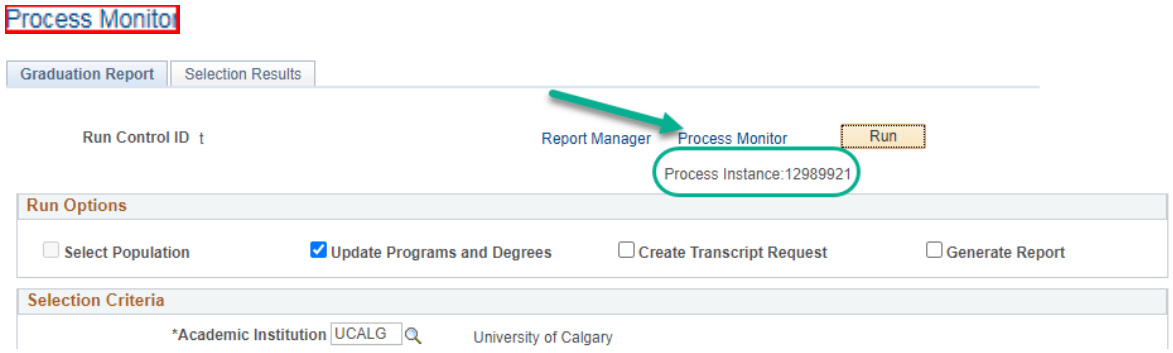


9. **Note:** No other options are required to be selected on the Process Scheduler Request page. Click the **OK** button.

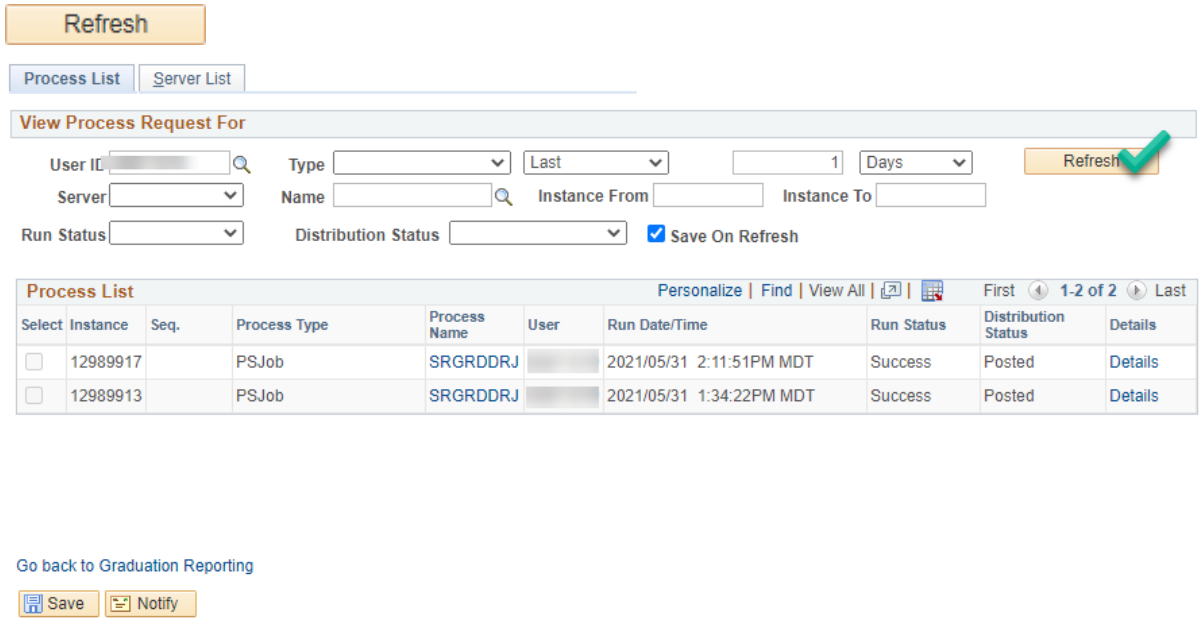
OK



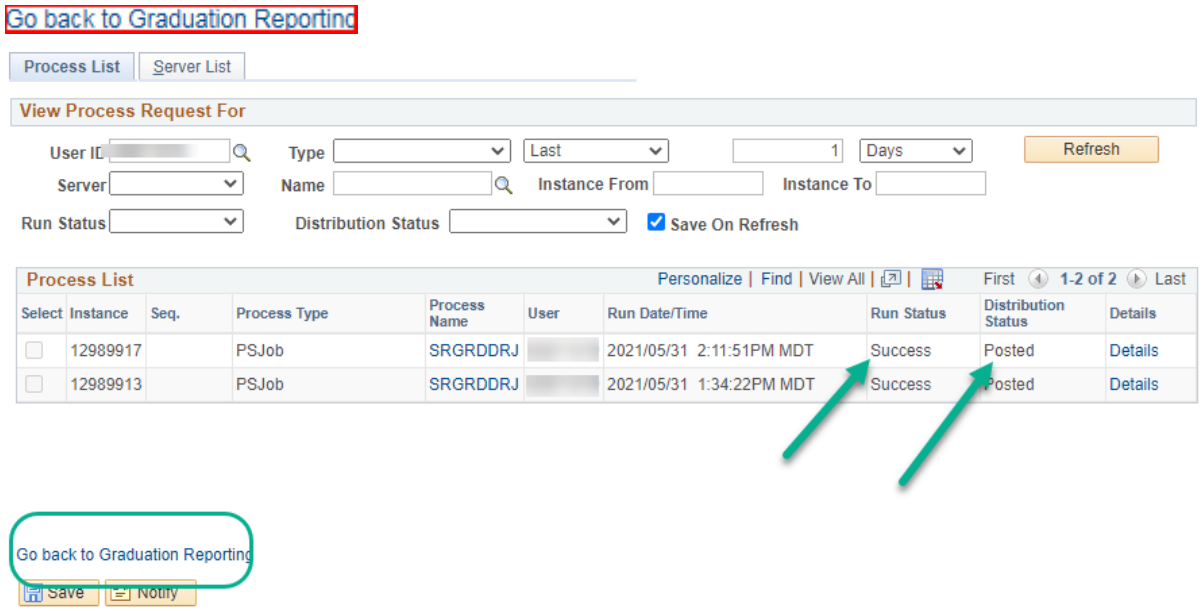
10. A Process Instance number will display indicating the request has been entered. Click the **Process Monitor** link.



11. As before, the Process List will display the progress of the request (e.g. Processing, Success, Posting and Posted). Clicking the Refresh button (sometimes this requires multiple clicks) will display the progress.
Click the **Refresh** button.

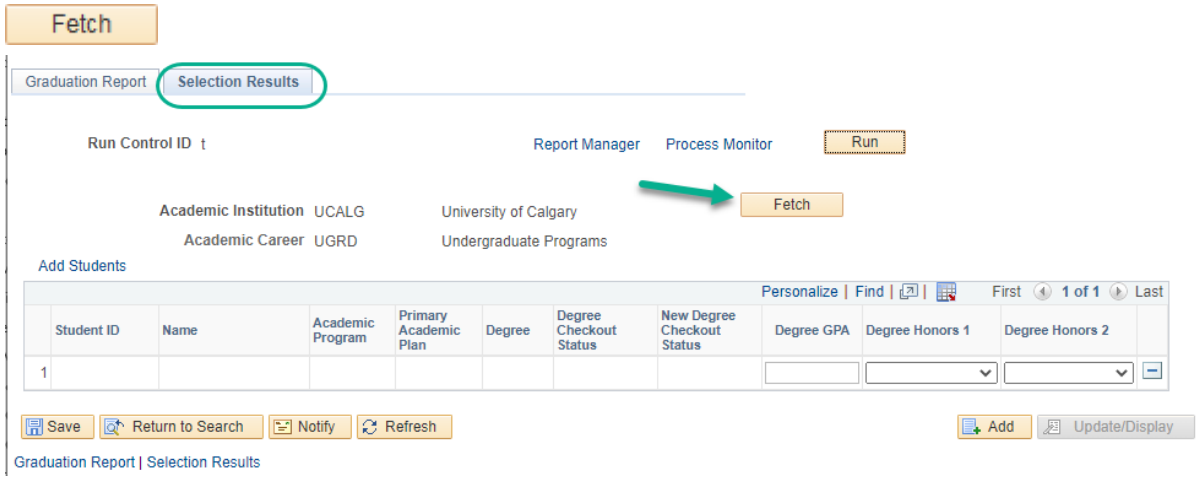


12. The process is complete when the Run Status = Success, and Distribution Status = Posted. Click the **Go back to Graduation Reporting** link.

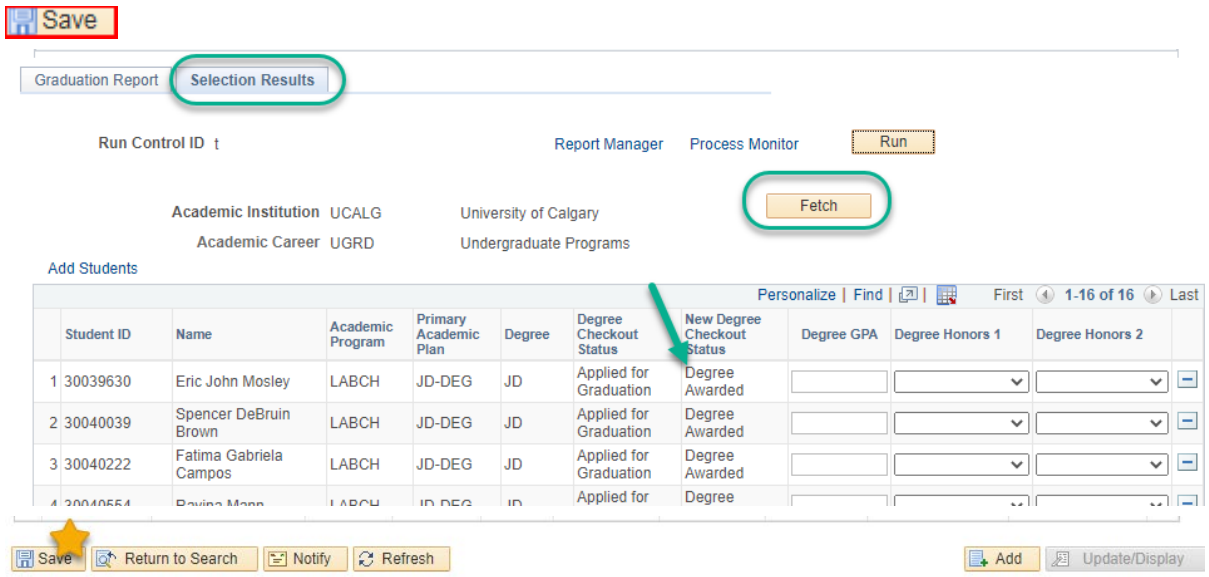


13. Click the **Selection Results** tab.

14. To view the list of students selected for Mass Graduation, click the Fetch button. Click the **Fetch** button.



15. Note that the New Degree Checkout Status has now been updated to **Degree Awarded** for all students.
Click the **Save** button.



Consult the corresponding online learning at www.ucalgary.ca/ittraining

End of Procedure