UNIVERSITY OF CALGARY

Student Groups & Student Group List

Training Guide

Student Groups & Student Group List

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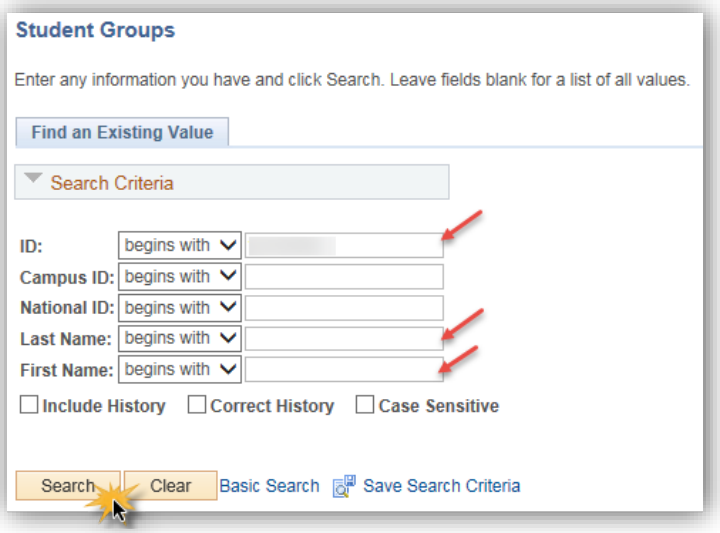
Student Groups

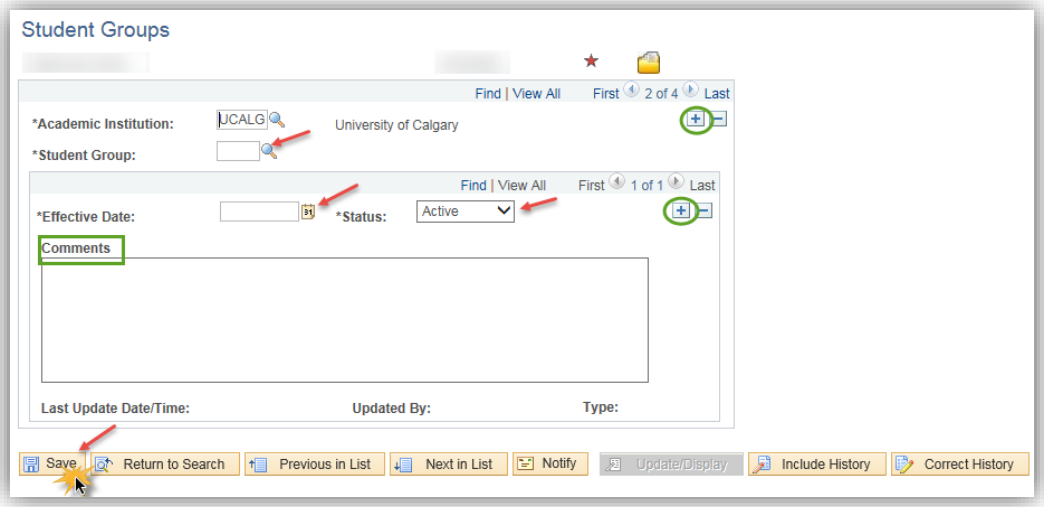
The Student Groups component can be used to categorize and track students for reporting and other purposes.

Access the Student Groups component using the navigation

Records and Enrollment > Career and Program Information > Student Groups

Enter the applicable search criteria:

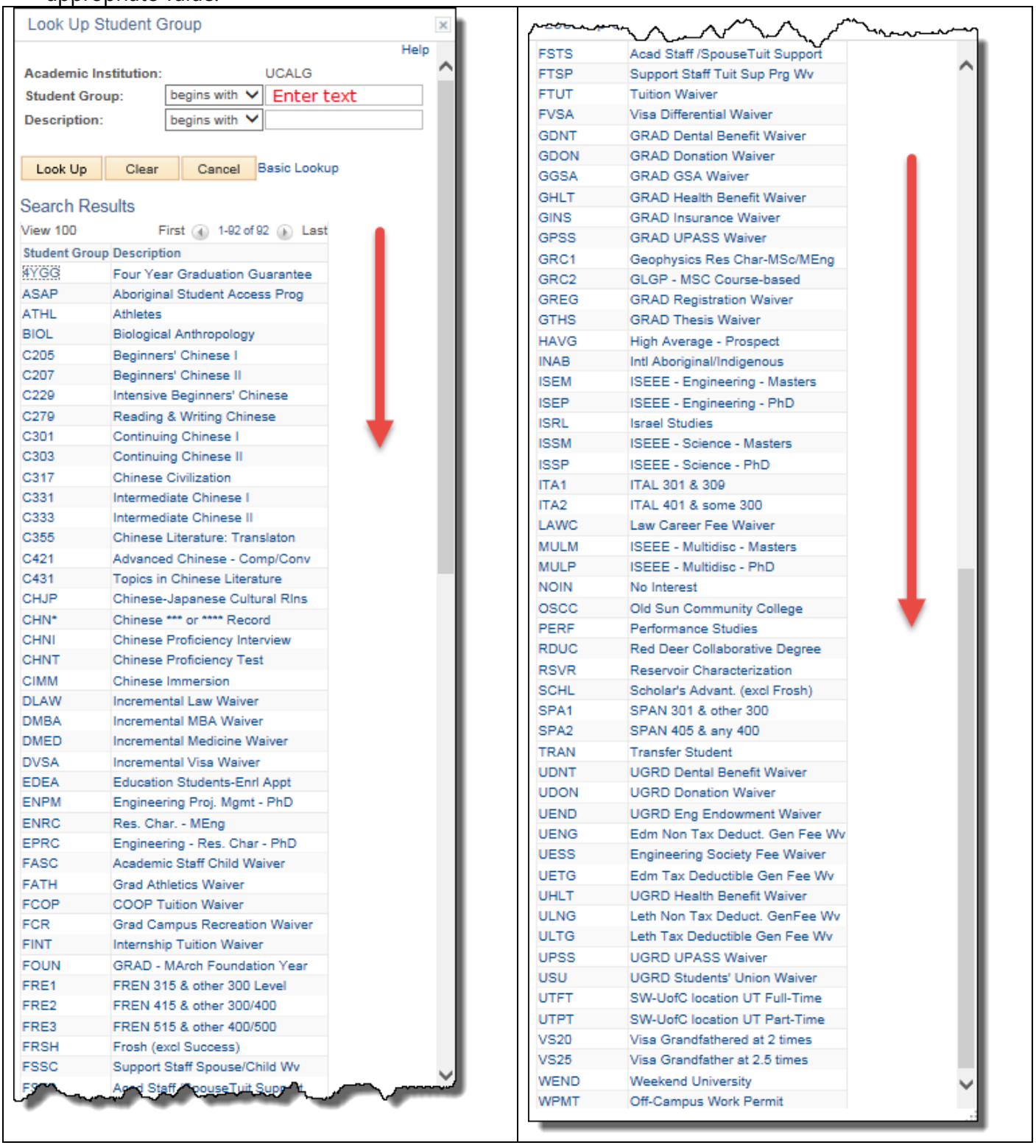




Student Groups & Student Group List

SA – Student Groups

1. Use the **Student Group** look up button to display the Student Group list of valid values and select the appropriate value.



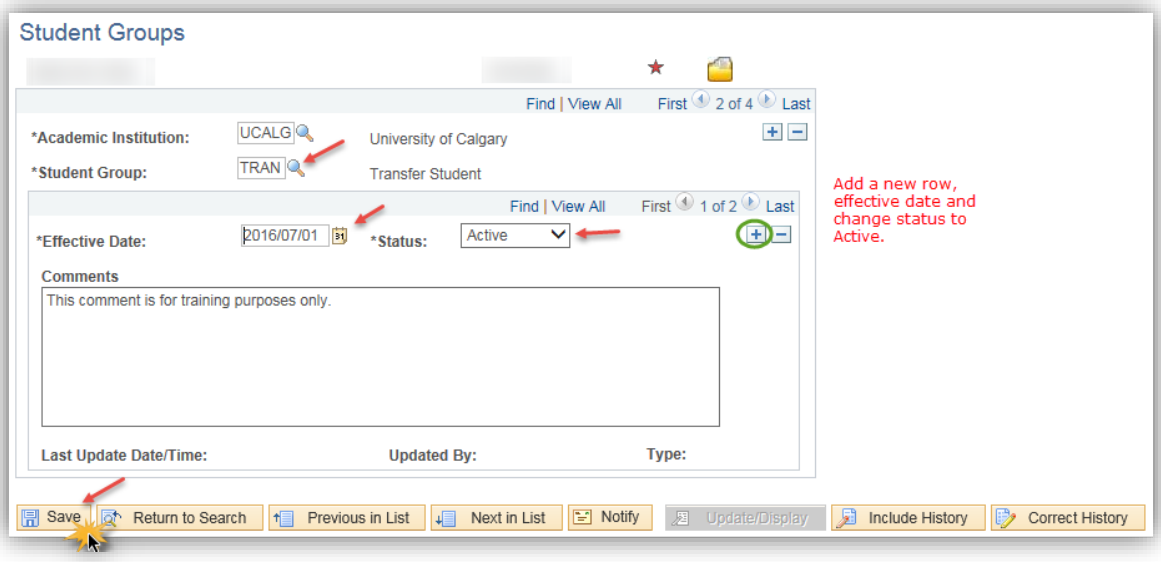
2. When the desired Student Group is selected the **Effective Date** defaults to the **System Date** (*the date the group is added to the student's record*).

   Note: a dating convention may be considered based on your business process; for example, using the first day of the term i.e. 2016/09/01. It will be important to document your business process for Enterprise Reporting to ensure they are aware of the dating convention in order for queries to be accurate. It is important to be consistent using the dating convention as this will also impact the accuracy of queries.

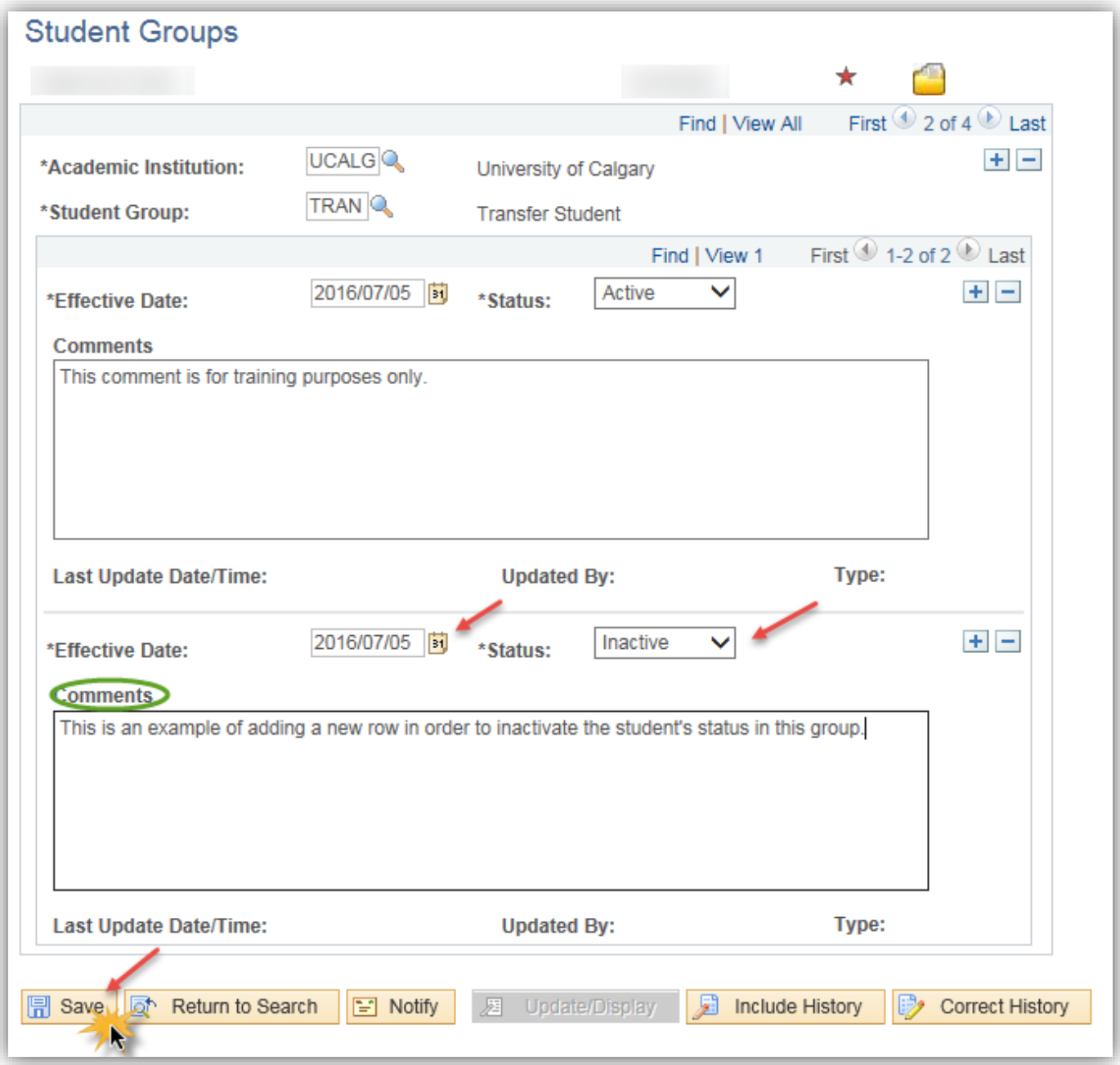
3. The **Status** field defaults to **Active.**

4. The **Comments** field can be used to enter comments. These comments would be viewed by authorized staff that have access to this functionality.

5. Click the **Save** button.

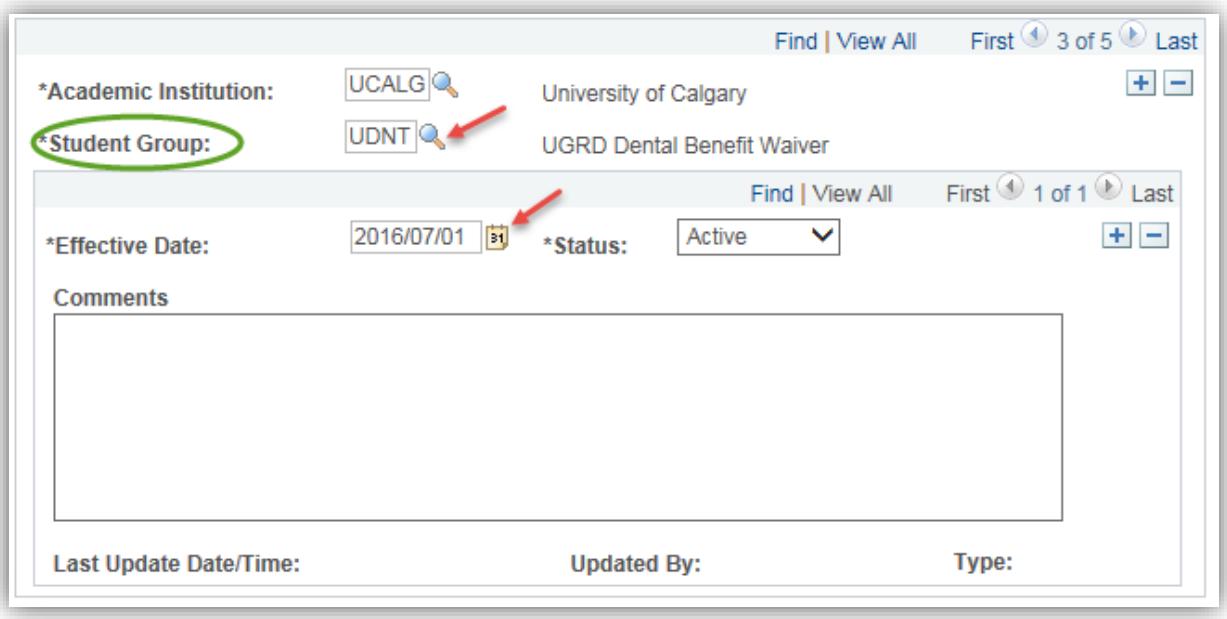


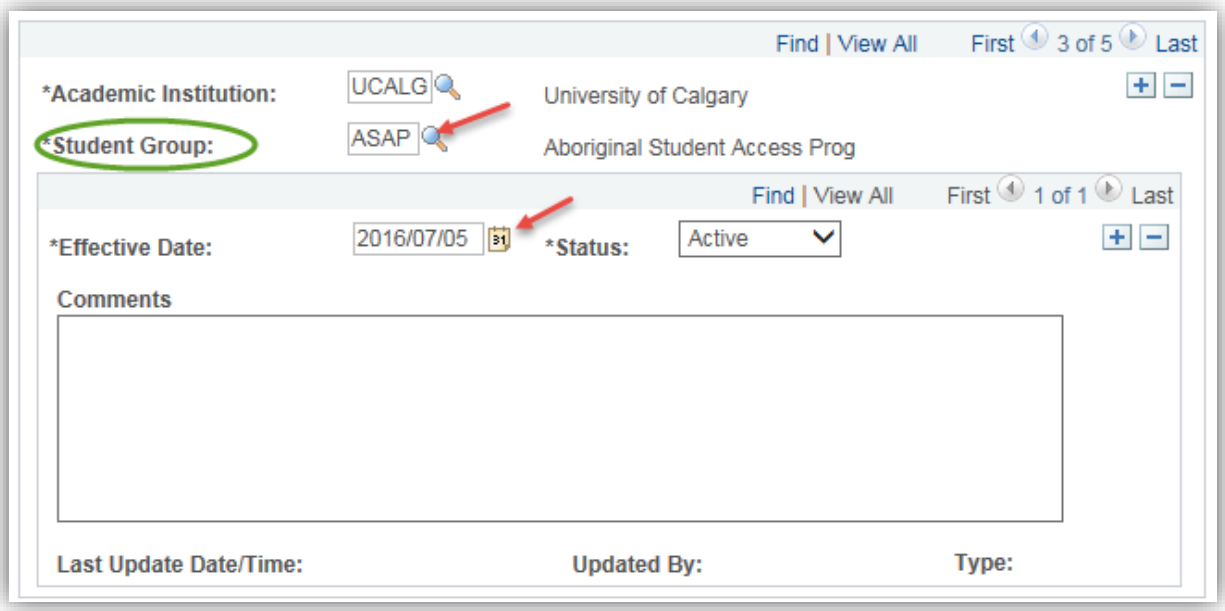
6. When the student no longer qualifies for this program, a new effective dated row can be added by clicking the plus button ⊞ in the **Effective Dated / Status** row. The **Status** can then be changed to **Inactive**. Adding a new effective row allows you to maintain the student's history.


Student Groups
Find | View All
First 2 of 4 Last
*Academic Institution:
UCALG
University of Calgary
*Student Group:
TRAN
Transfer Student
Find | View 1
First 1-2 of 2 Last
*Effective Date:
2016/07/05
*Status:
Active
Comments
This comment is for training purposes only.
Last Update Date/Time:
Updated By:
Type:
*Effective Date:
2016/07/05
*Status:
Inactive
Comments
This is an example of adding a new row in order to inactivate the student's status in this group.
Last Update Date/Time:
Updated By:
Type:
Save
Return to Search
Notify
Update/Display
Include History
Correct History

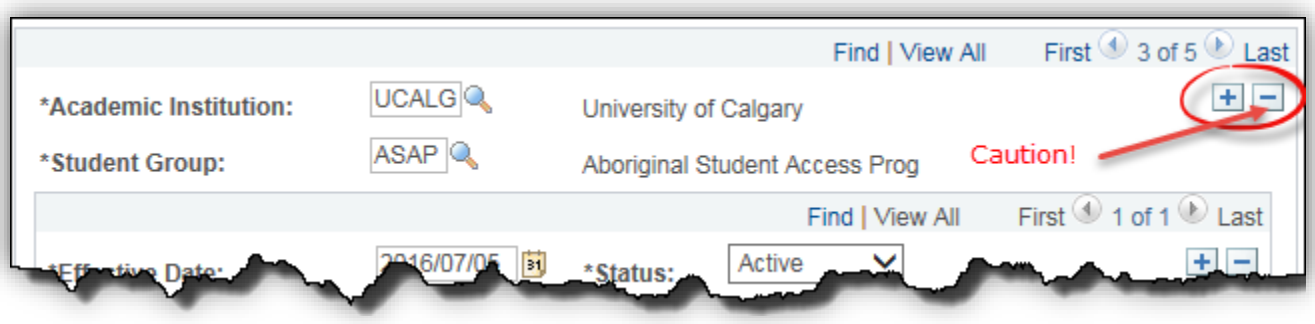
Important notes:

Clicking the plus sign in the Student Group row allows you to add an additional Student Group to the student's record. It is **critical** you are careful to work only with the Students Groups you are authorized for.





The minus button at upper level should only be used to **correct** an error. Extreme caution must be used when using the minus button ⊟ because it is possible for a user to accidentally delete groups that have been added by others

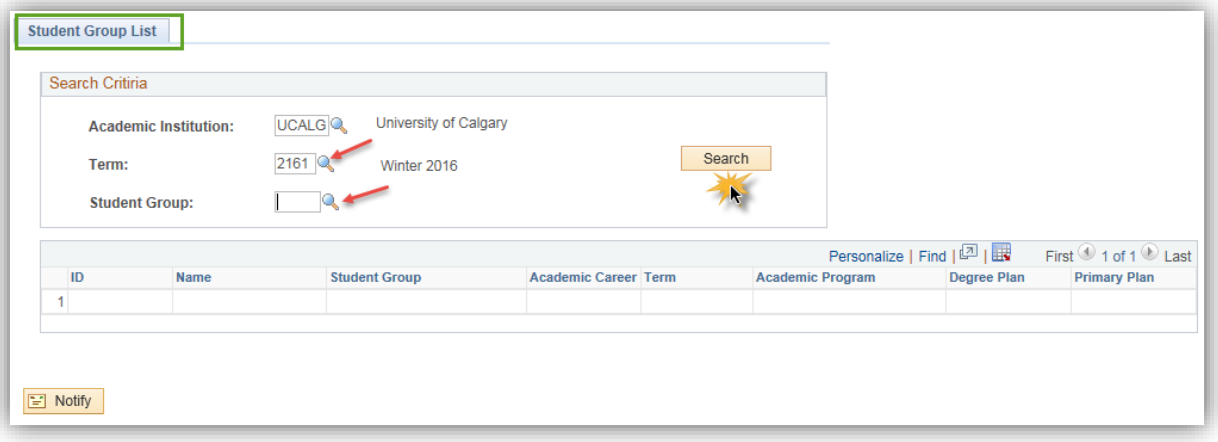


Student Group List

The Student Group List component allows you to view, by term, students who are attached to a specific Student Group. This is one way you can verify the data entered in the Student Group component.

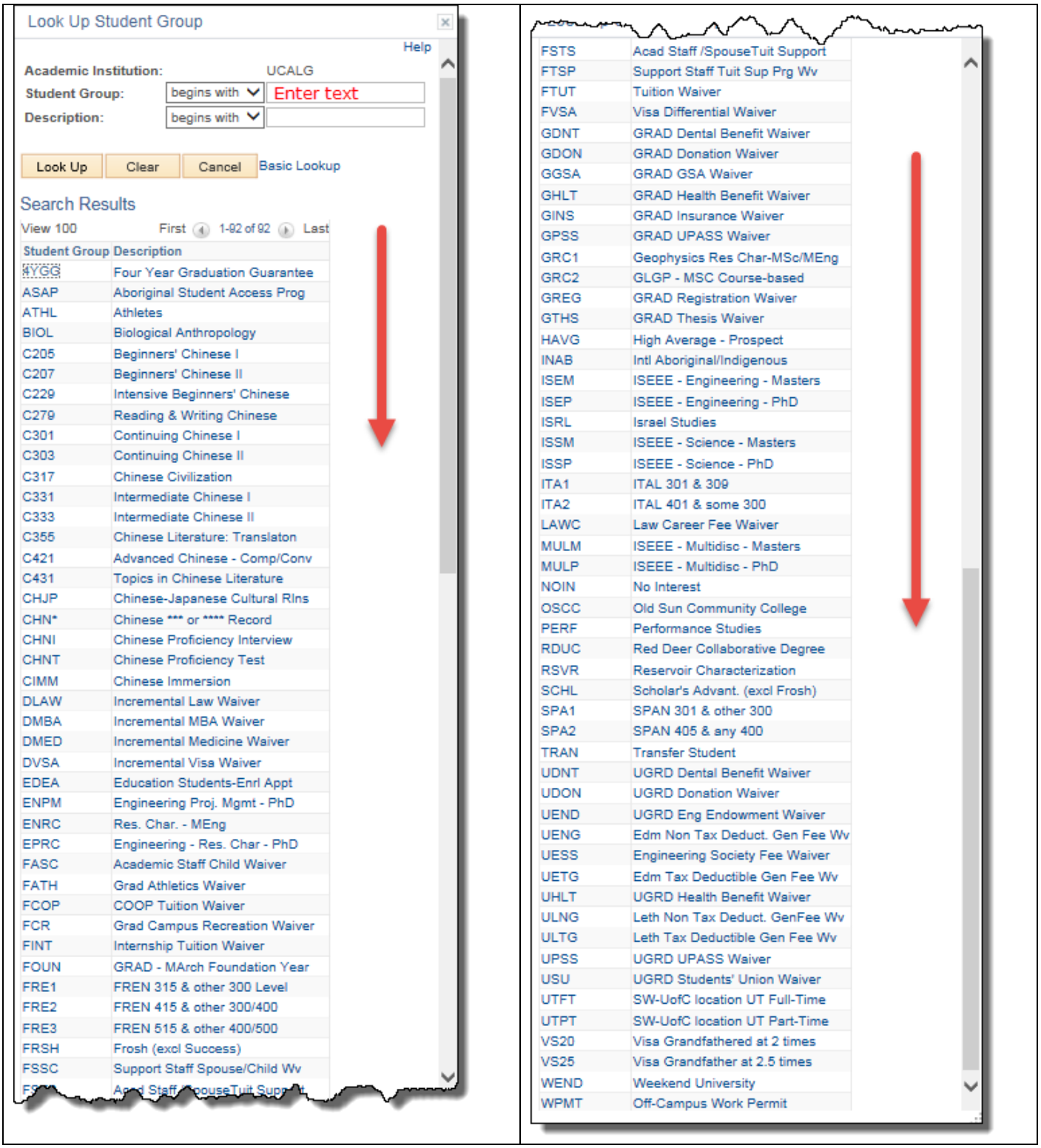
Access this component using the navigation

Records and Enrollment > Career and Program Information > Student Group List



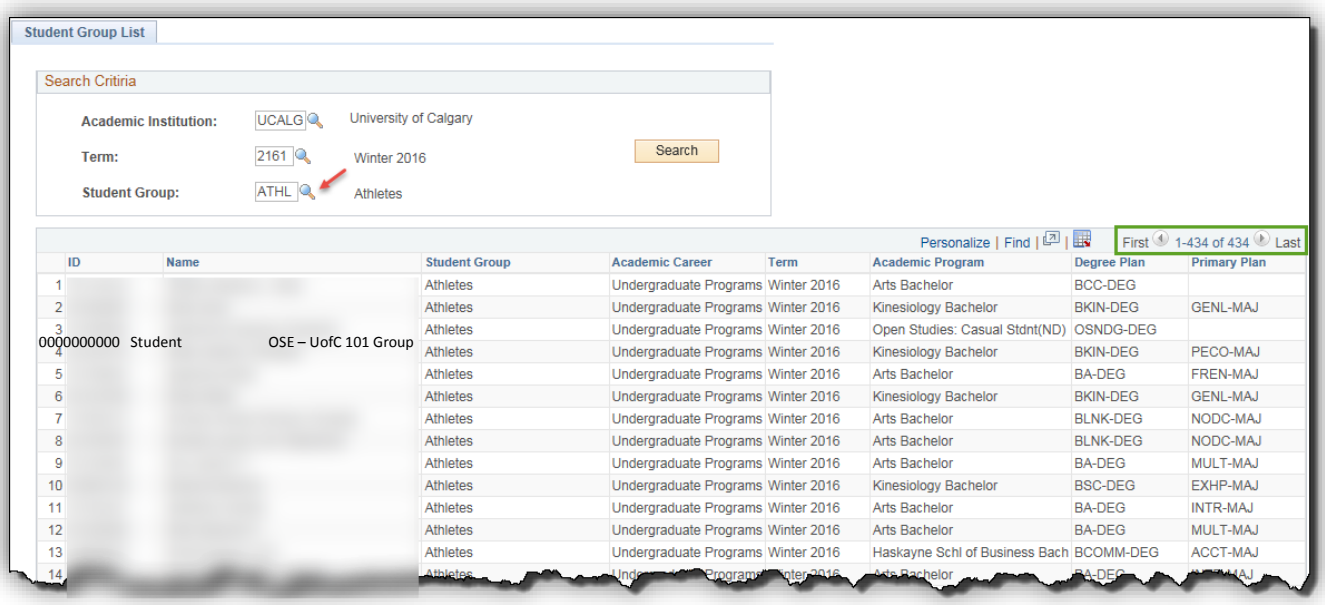
1. Use the **Term** look up button to look up the desired term for the Student Group you wish to display (e.g. Winter 2016).

2. Use the **Student Group** look up button to display the Student Group valid values and select the appropriate value.



3. Click the **Search** button.

4. The list of students attached to the selected Student Group for the term entered displays in the grid below the Search Criteria.

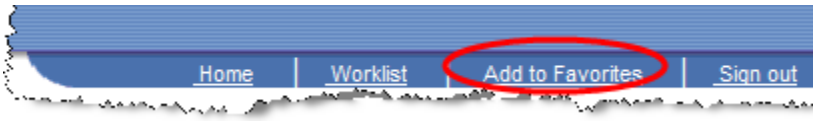


Note: the query will select any student whose student group record is **active** during the time period related to the specified term. However, when the student group record is added <u>after</u> the last action date for the term (usually the end of the add period for the term) the student will be excluded from the report. For example, if the student group record is made "**inactive**" after the add period has ended for the Fall term, the student will still be reported as **active** in that term.

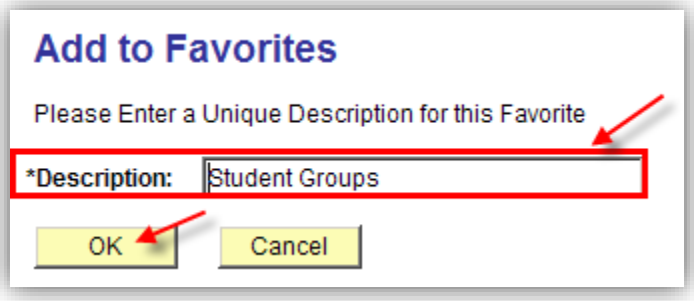
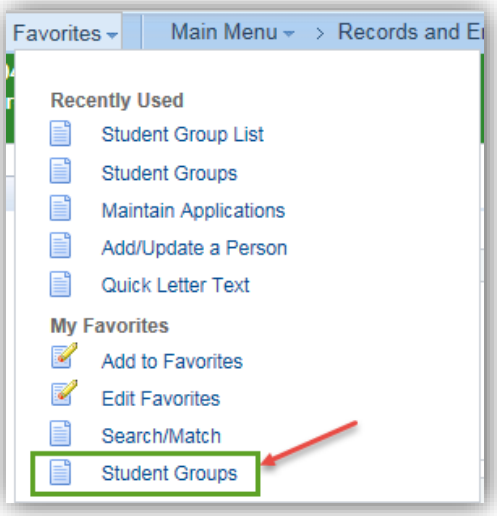
My Favorites

When the page is viewed frequently, the component can be added to My Favorites for easy access.

1. To add the **Student Group** and **Student Group List** components to **My Favorites**, navigate to the component and then click the **Add to Favorites** link (top right-hand corner of the page).



2. Enter a unique description for this page or use the default name and then click on **OK**.



3. The link will then display in the **My Favorites** folder in the **Menu** on the left side of the page. Clicking on the appropriate link within **My Favorites** transfers you to the component.