

University of Houston-Clear Lake

Running Transfer Credit Summary Reports

Office of Admissions

Change Control:

Version	Update/Initials
1.0	Created/CAU

I. Process Overview

Use this process to create Transfer Credit Summary Reports for students.

II. Process Description & Navigation

Records and Enrollment, Transfer Credit Evaluation, Transfer Credit Summary

1. If this is the first time you are running the report, you will want to create a new run control. Click on Add a New Value



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

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

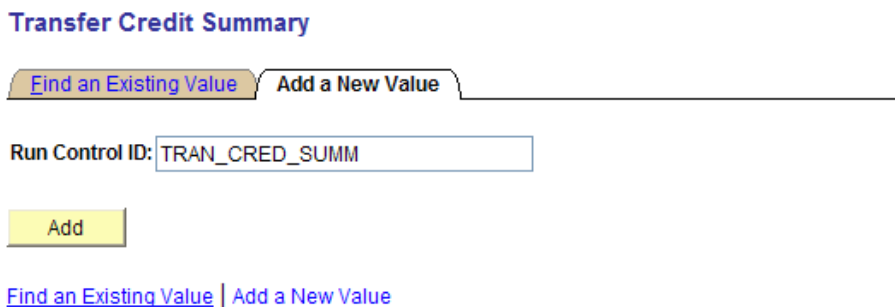
Run Control ID: begins with

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. Enter a name you are calling this report. Click Add.



Transfer Credit Summary

[Find an Existing Value](#) **Add a New Value**

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

3. Enter the information as noted below to retrieve the summary

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Selection Criteria | **Selection Result**

ID: Joe Test
*Academic Institution: UH-Clear Lake

Academic Career

All Careers Academic Career:
 Career/Program/Plan Academic Program:
Academic Plan:

Filter Options

*Posted Status:
Articulation Term:

Sort Order (for Printed Report)

Articulation Term:

[Selection Criteria](#) | [Selection Result](#)

- a. Student ID: Enter the ID of the individual whose transfer credit summary you want to view or print.
- b. Academic Institution=00759
- c. Academic Career:
 - i. **All Careers** is the default and it will retrieve transfer credit for all academic careers associated with the student.
 - ii. **Career/Program/Plan** will allow you to retrieve the student's transfer credit summaries within a specific academic career, program and plan.
- d. Filter Options:
 - i. **Posted Status:** There are four options:
 - All:** Enables you to retrieve all transfer credit summaries regardless of transfer status.
 - Completed:** Enables you to retrieve only transfer credit summaries in which transfer credit has been evaluated and models created but the individual does not yet have an academic program, academic plan, and term activation record for the academic program and articulation term, as defined on the transfer credit model.
 - Modeled:** Enables you to retrieve only transfer credit summaries in which models have been created.
 - Posted:** Enables you to retrieve transfer credit summaries for transfer credit that has been posted to a student's career term records (STDNT_CAR_TERM table). This differs from the *Completed* status because the individual is a matriculated student who has an academic program, academic plan, and term activation record for the academic program and articulation term, as defined on the transfer credit model.

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- ii. **Articulation Term:** Select the specific term for which transfer credit has been processed.
 - e. Sort Order (for Printed Report)
 - i. **Articulation Term:** There are two options:
 - Ascending:** Prints models from the oldest to the newest articulation term.
 - Descending:** Prints models from the newest to the oldest articulation term.
4. After all Criteria has been entered, Click Submit
 5. Upon clicking Submit, you will be taken to the Selection Result Page. This is a page view of the transfer credit. If there are more than one transcript entered, you will have the option to scroll through them.
 6. Click on Generate Report to get the printable version of the report.

Selection Criteria Selection Result

ID:

Generate Report

Find | View All First ◀ 1 of 1 ▶ Last

Transfer Credit Type: Course Credits

Find | View All First ◀ 1 of 1 ▶ Last

Model Nbr: 1

Institution: UH-Clear Lake **Transfer Type:** External

Career: Undergraduate **Source School:** San Jacinto College Central

Acad Prog: School of Business UG

Acad Plan: Gen Business BBA

Articulation Term	Group		External Subject / Catalog Nbr	Units Taken	Grade Input	Status	Equivalent Subject / Catlg Nbr	Units Transferred	Official Grade
1750	1	Submitted	SPCH 1321	3.00	TA	Accepted	SPCH 1321	3.000	TA
1750	2	Submitted	MATH 1316	3.00	TW	Accepted	MATH 1316	0.000	TW
1750	3	Submitted	HRPO 1311	3.00	TW	Accepted	GENELE 9999-LL	0.000	TW
1750	4	Submitted	PSYC 2301	3.00	TB	Accepted	PSYC 2301	3.000	TB
1750	5	Submitted	PHIL 1301	3.00	TW	Accepted	PHIL 1301	0.000	TW
1750	6	Submitted	PHIL 1301	3.00	TW	Accepted	PHIL 1301	0.000	TW
1750	7	Submitted	PHED 1123	1.00	TA	Accepted	GENELE 9999-PE	1.000	TA
1750	8	Submitted	PHED 1123	1.00	TA	Accepted	GENELE 9999-PE	1.000	TA
1750	9	Submitted	PHED 1123	1.00	TW	Accepted	GENELE 9999-PE	0.000	TW
1750	10	Submitted	MUSI 1306	3.00	TA	Accepted	MUSI 1306	3.000	TA
1750	11	Submitted	MATH 1324	3.00	TB	Accepted	MATH 1324	3.000	TB
1750	12	Submitted	MATH 1314	3.00	TW	Accepted	MATH 1314	0.000	TW
1750	13	Submitted	MATH 1314	3.00	TB	Accepted	MATH 1314	3.000	TB
1750	14	Submitted	ITNW 1321	3.00	TA	Accepted	GENELE 9999-LL	3.000	TA
1750	15	Submitted	HIST 1302	3.00	TB	Accepted	HIST 1302	3.000	TB
1750	16	Submitted	HIST 1301	3.00	TC	Accepted	HIST 1301	3.000	TC
1750	17	Submitted	GOVT 2302	3.00	TW	Accepted	GOVT 2302	0.000	TW
1750	18	Submitted	GOVT 2302	3.00	TC	Accepted	GOVT 2302	3.000	TC
1750	19	Submitted	GOVT 2301	3.00	TA	Accepted	GOVT 2301	3.000	TA
1750	20	Submitted	GEOG 1303	3.00	TW	Accepted	GEOG 1303	0.000	TW

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7. The Generate Report Button will become a Report Manager Link.

The screenshot shows a web interface with two tabs: "Selection Criteria" and "Selection Result". The "Selection Result" tab is active. At the top, there is an "ID:" field and a "Process Instance: 2708182" label. To the right of the process instance is a blue link labeled "Report Manager", which is circled in red. Below this is a navigation bar with "Find | View All" and "First 1 of 1 Last". Underneath, it says "Transfer Credit Type: Course Credits" and another navigation bar with "Find | View All" and "First 1 of 1 Last". The main content area displays the following information:

Model Nbr:	1	Transfer Type:	External
Institution:	UH-Clear Lake	Source School:	San Jacinto College Central
Career:	Undergraduate		
Acad Prog:	School of Business UG		
Acad Plan:	Gen Business BBA		

8. Click on the Report Manager Link. This will take you to the Report Manager component.

The screenshot shows the "Administration" tab with the "Archives" sub-tab selected. Below the tabs is a search area with a text input field, a "Type:" dropdown, a "Last:" input with "1" and "Days" dropdown, and a "Refresh" button. There are also "Status:" and "Folder:" dropdowns, and "Instance:" and "to:" input fields. Below this is a "Report List" table with a navigation bar "Customize | Find | View All" and "First 1 of 1 Last".

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	802314	2708182	Student Transfer Credit Eval	07/10/2008 12:49:59PM	Acrobat (*.pdf)	Posted	Details

9. Click Refresh until the process indicated Posted and the Details becomes a link.
10. Click on the Details Link.

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Report Detail

Report

Report ID: 802314 Process Instance: 2708182 [Message Log](#)
Name: SRTCSTEV Process Type: SQR Report
Run Status: Success

Student Transfer Credit Eval

Distribution Details

Distribution Node: PSUNX Expiration Date: 08/09/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,547	07/10/2008 12:50:20.000000PM CDT
srtcstev_2708182.PDF	7,421	07/10/2008 12:50:20.000000PM CDT
Trace File	3,119	07/10/2008 12:50:20.000000PM CDT

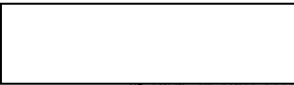
Distribute To

Distribution ID Type	*Distribution ID
User	0077886

OK Cancel

11. Click on the PDF file link to retrieve the report. Click on the PDF file link to retrieve the report. You can then print the report.

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***** COURSE CREDIT *****

Run Date 07/10/2008
 Run Time 12:50:06

Academic Career: Undergraduate
 Academic Program: School of Business UG (Admit Term : Summer 2008)
 Academic Plan: Gen Business BBA

 * COURSE CREDIT *

Transfer Credit Type: External
 Transfer Institution: 002609 San Jacinto College Central Core Status: Not Indicated
 Articulation Program: School of Business UG
 Articulation Plan: Gen Business BBA

Internal Articulation Term : Summer 2008

External Transfer Record					Internal Equivalency/Reject Reason									
Subject	Nbr	Title	Units	Grd	Level	Status	Subject	Nbr	Title	Units	Grd	Repeat	Core	
FALL 00	SPCH	1321 Business & Professio	3.00	TA	1	Accepted	SPCH	1321 Business and Profess	3.00	TA			Comm II	
FALL 00	MATH	1316 College Trigonometry	3.00	TW	1	Accepted	MATH	1316 Plane Trigonometry		TW				
SPR 02	HRPO	1311 Human Relations	3.00	TW	1	Accepted	GENELE	9999-1General Lower Level		TW				
FALL 99	PSYC	2301 General Psychology	3.00	TE	2	Accepted	PSYC	2301 Introduction to Psyc	3.00	TE			S&S Sci I	
FALL 02	PHIL	1301 Introduction To Phil	3.00	TW	1	Accepted	PHIL	1301 Intro to Philosophy		TW				
SPR 03	PHIL	1301 Introduction To Phil	3.00	TW	1	Accepted	PHIL	1301 Intro to Philosophy		TW				
FALL 99	FHED	1123 Weight Training	1.00	TA	1	Accepted	GENELE	9999-PEower Level PE Activ	1.00	TA				
SPR 00	FHED	1123 Weight Training	1.00	TA	1	Accepted	GENELE	9999-PEower Level PE Activ	1.00	TA				
FALL 01	FHED	1123 Weight Training	1.00	TW	1	Accepted	GENELE	9999-PEower Level PE Activ		TW				
SPR 00	MUSI	1306 Listening To Music	3.00	TA	1	Accepted	MUSI	1306 Music Appreciation	3.00	TA			VP Arts I	
FALL 02	MATH	1324 Finite Math	3.00	TE	1	Accepted	MATH	1324 Finite Math with App	3.00	TE			Math I	
FALL 99	MATH	1314 College Algebra	3.00	TW	1	Accepted	MATH	1314 College Algebra		TW				
SPR 00	MATH	1314 College Algebra	3.00	TE	1	Accepted	MATH	1314 College Algebra	3.00	TE			Math I	
FALL 00	ITNW	1321 Intro To Networking	3.00	TA	1	Accepted	GENELE	9999-1General Lower Level	3.00	TA				
FALL 00	HIST	1302 Amer Hist Since 1877	3.00	TE	1	Accepted	HIST	1302 United States Histor	3.00	TE			History I	
FALL 99	HIST	1301 Amer Hist Before 187	3.00	TC	1	Accepted	HIST	1301 United States Histor	3.00	TC			History I	
SPR 01	GOVT	2302 American, State, Loc	3.00	TW	2	Accepted	GOVT	2302 Amer Gov: N,S and L		TW				
SPR 02	GOVT	2302 American, State, Loc	3.00	TC	2	Accepted	GOVT	2302 Amer Gov: N,S and L	3.00	TC			F Sci I	
FALL 02	GOVT	2301 American, State, Loc	3.00	TA	2	Accepted	GOVT	2301 Amer Gov: N,S and L	3.00	TA			F Sci I	
SPR 01	GEOG	1303 World Geography	3.00	TW	1	Accepted	GEOG	1303 Local and World Geog		TW				
FALL 01	GEOG	1303 World Geography	3.00	TW	1	Accepted	GEOG	1303 Local and World Geog		TW				
FALL 01	ENGL	1302 Composition II	3.00	TW	1	Accepted	ENGL	1302 Composition II		TW				
SPR 02	ENGL	1302 Composition II	3.00	TE	1	Accepted	ENGL	1302 Composition II	3.00	TE			Comm I	
FALL 99	ENGL	1301 Composition I	3.00	TC	1	Accepted	ENGL	1301 Composition I	3.00	TC			Comm I	
SPR 01	ECON	2302 Principles Of Microe	3.00	TE	2	Accepted	ECON	2302 Principles of Econom	3.00	TE			S&S Sci I	
SPR 03	ECON	2301 Macroeconomic Princ	3.00	TE	2	Accepted	ECON	2301 Principles of Econom	3.00	TE			S&S Sci I	
SPR 00	CSCI	1321 Introduction To Micr	3.00	TE	1	Accepted	CSCI	1341 Microcomputer Concep	3.00	TE				
SPR 01	CRIJ	2314 Criminal Investigati	3.00	TE	2	Accepted	GENELE	9999-1General Lower Level	3.00	TE				