

The Extract Postal or Email Address is a custom process designed to allow users to extract postal or email addresses into a comma delimited file which contains name and address information that can be used to generate letters, address labels or emails.

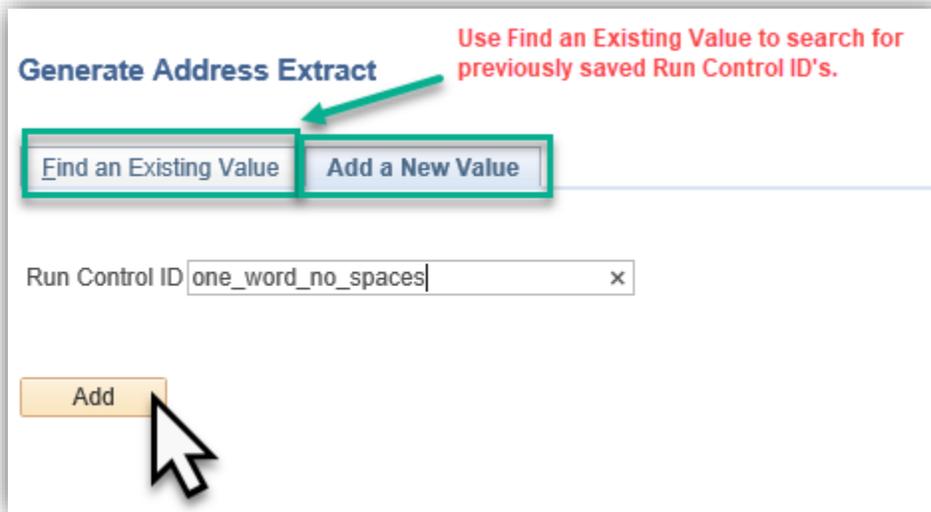
1. Click the **Campus Community** link.

2. Click the **Extract Postal/Email Address** link.

3. Adding a new value allows you to create new selection criteria if none has been previously selected. Click the **Add a New Value** tab.

4. You will be prompted to enter a Run Control ID. A run control can be any name without spaces and less than 30 characters. After creating the Run Control ID the first time, use Find an Existing Value to locate the ID in the future.

The Run Control ID name does not affect the outcome of the postal extract process. However, if you create a Run Control ID name that includes spaces the batch process will not be successful. **Tip:** Use underscores to join multiple words (e.g. one_word_no_spaces). Click the **Add** button.



Generate Address Extract

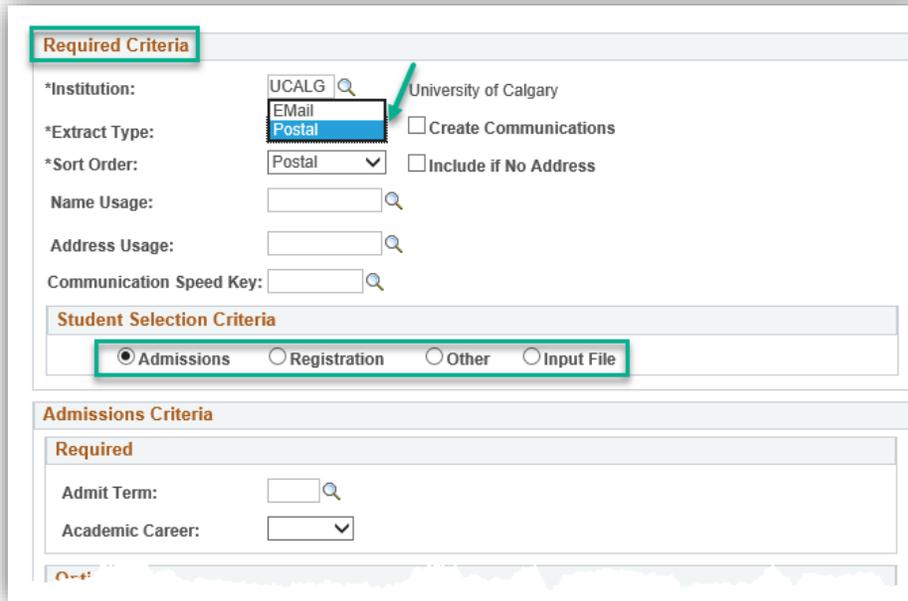
Use Find an Existing Value to search for previously saved Run Control ID's.

Find an Existing Value Add a New Value

Run Control ID

Add

5. In Required Criteria, click the list for Extract Type. There are two types of extracts: **Postal** or **Email**. Sort order can only be used for Email and can be sorted by name. For the Student Selection Criteria, when selecting Admissions, Registration or Input File the bottom menu options will change accordingly. For this example, click the **Postal** list item.



Required Criteria

*Institution: UCALG University of Calgary

*Extract Type: **Email** Create Communications
Postal Include if No Address

*Sort Order: Postal

Name Usage:

Address Usage:

Communication Speed Key:

Student Selection Criteria

Admissions Registration Other Input File

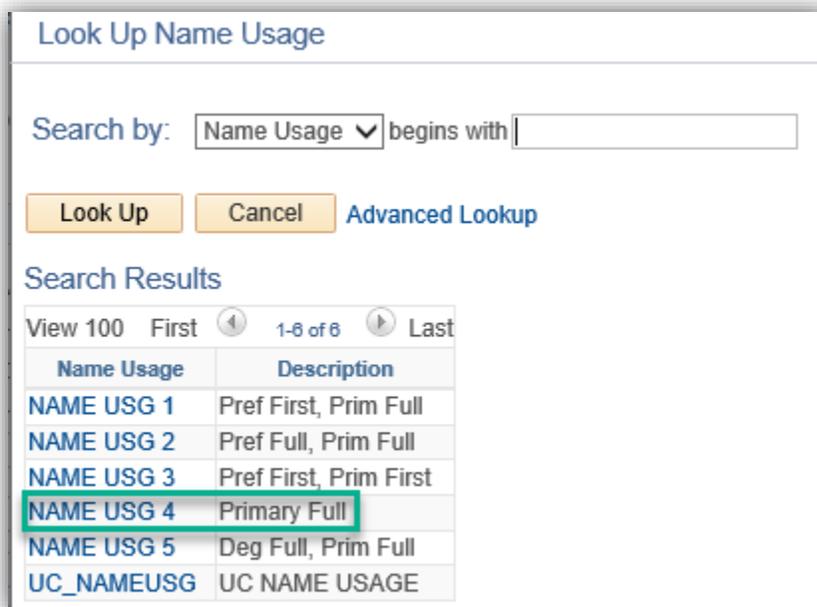
Admissions Criteria

Required

Admit Term:

Academic Career:

6. Click the **Look up Name Usage** button. A list of Name Usages display indicating the various descriptions available. For this example, select **NAME USG 4** Primary Full.



Look up Name Usage

Search by: Name Usage begins with

[Advanced Lookup](#)

Search Results

View 100 First 1-6 of 6 Last

Name Usage	Description
NAME USG 1	Pref First, Prim Full
NAME USG 2	Pref Full, Prim Full
NAME USG 3	Pref First, Prim First
NAME USG 4	Primary Full
NAME USG 5	Deg Full, Prim Full
UC_NAMEUSG	UC NAME USAGE

7. Click the **Look up Address Usage** button. A list of Address Usages display and their descriptions. For this example, select **PERM** for Permanent Home Address.

Look Up Address Usage

Search by: Address Usage begins with

Look Up **Cancel** [Advanced Lookup](#)

Search Results

View 100 First 1-3 of 3 Last

Address Usage	Description
HOME	Current Home Address
MAIL	Mailing Address (HOME, PERM)
PERM	Permanent Home Address

8. Click the **Look up Admit Term** button. You can scroll to select a specific term you wish to use for the Admissions Criteria or enter the desired term (e.g. 2207 Fall 2020). Enter the desired information into the **begins with** field and press **Look Up** or **Enter**.

Look Up Admit Term

Search by: Term begins with

Look Up **Cancel** [Advanced Lookup](#)

Search Results

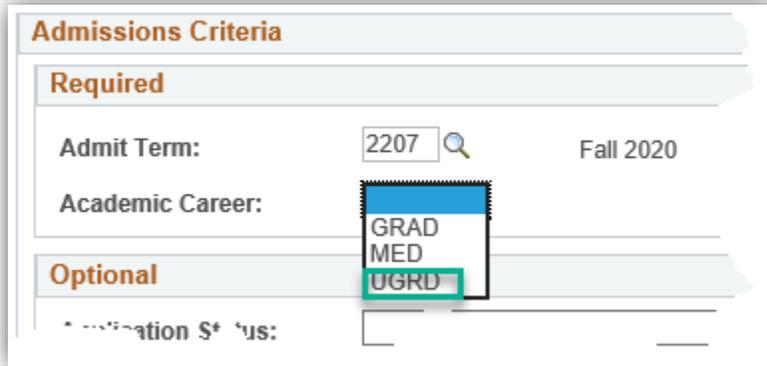
View 100 First 1-242 of 242 Last

Term	Description
0000	Beginning of Time
0503	Spring/Summer 1950
0507	Fall/Winter 1950/1951
0517	Fall/Winter 1951/1952
0527	Fall/Winter 1952/1953
0537	Fall/Winter 1953/1954
0547	Fall/Winter 1954/1955
0557	Fall/Winter 1955/1956
0567	Fall/Winter 1956/1957
0577	Fall/Winter 1957/1958
0587	Fall/Winter 1958/1959
0593	Spring/Summer 1959
0597	Fall/Winter 1959/1960
0603	Spring/Summer 1960
0607	Fall/Winter 1960/1961
0613	Spring/Summer 1961
0617	Fall/Winter 1961/1962
0623	Spring/Summer 1962
0627	Spring/Summer 1962

Enter the term directly and press Lookup or Enter or you can scroll down the list of terms.



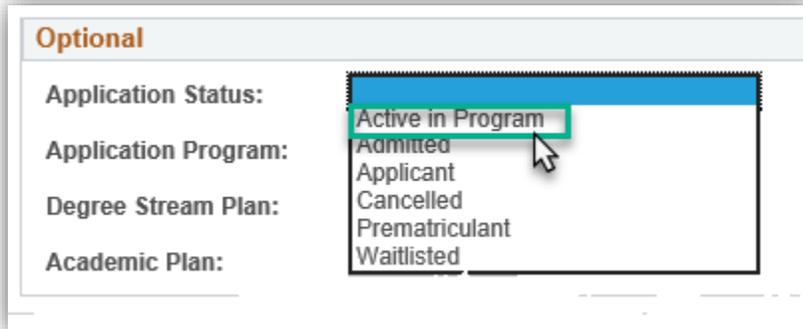
9. Click the **Academic Career** list. There are three options on the Academic Career drop down menu: GRAD (Graduate Students) MED (Medical Students) and UGRD (Undergraduate Students). For this example, click the **UGRD** link.



The screenshot shows a form titled "Admissions Criteria" with a "Required" section. The "Admit Term" is set to "2207" and "Fall 2020". The "Academic Career" dropdown menu is open, showing three options: "GRAD", "MED", and "UGRD". The "UGRD" option is highlighted with a green box.

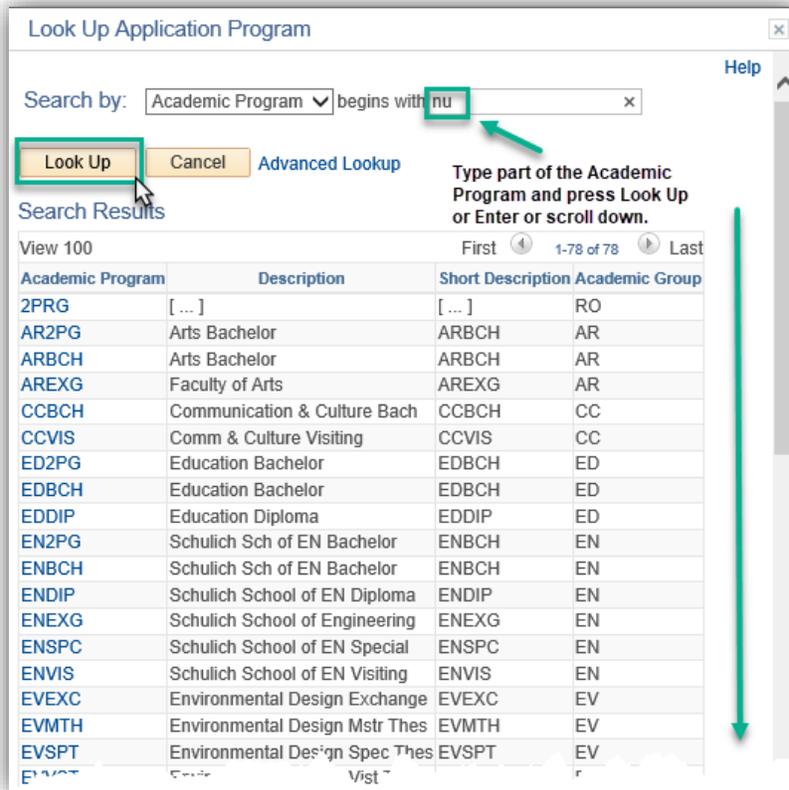
10. Click the **Application Status** list. There are several options on the Application Program list:
- Active in Program
 - Admitted
 - Applicant
 - Cancelled
 - Prematriculant
 - Waitlisted

For this example, click the **Active in Program** list item.



The screenshot shows a form titled "Optional" with an "Application Status" dropdown menu. The dropdown menu is open, showing six options: "Active in Program", "Admitted", "Applicant", "Cancelled", "Prematriculant", and "Waitlisted". The "Active in Program" option is highlighted with a green box and a mouse cursor is pointing at it.

- Click the **Look up Application Program** button. A list of Academic Programs display. Scroll through the list or type in a few letters of the academic program and press Look Up or Enter to reduce the search (e.g. nu = Nursing). Press **Look Up** or **Enter** and click the Academic Program.



Look Up Application Program

Search by: Academic Program begins with

Look Up Cancel Advanced Lookup

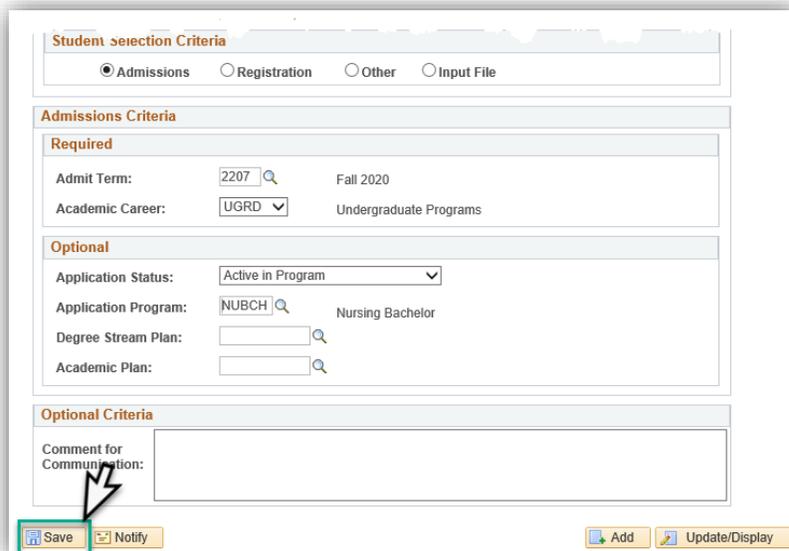
Type part of the Academic Program and press Look Up or Enter or scroll down.

Search Results

View 100 First 1-78 of 78 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

- Once you have completed the desired selection criteria you can save the criteria (bottom of page) or begin the Run.



Student selection Criteria

Admissions Registration Other Input File

Admissions Criteria

Required

Admit Term: Fall 2020

Academic Career: Undergraduate Programs

Optional

Application Status:

Application Program: Nursing Bachelor

Degree Stream Plan:

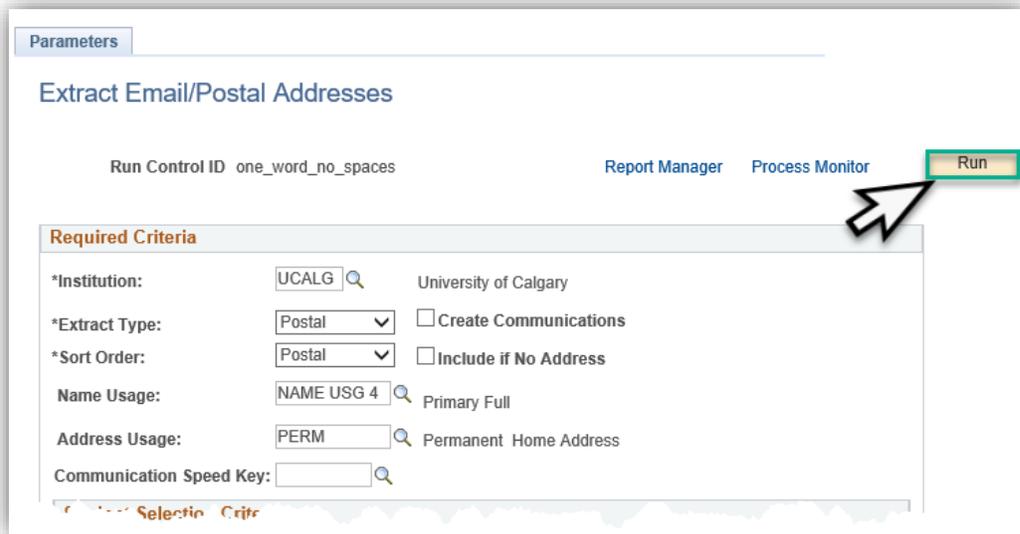
Academic Plan:

Optional Criteria

Comment for Communication:

Save

13. Click the **Run** button.



Parameters

Extract Email/Postal Addresses

Run Control ID one_word_no_spaces

Report Manager Process Monitor **Run**

Required Criteria

*Institution: UCALG University of Calgary

*Extract Type: Postal Create Communications

*Sort Order: Postal Include if No Address

Name Usage: NAME USG 4 Primary Full

Address Usage: PERM Permanent Home Address

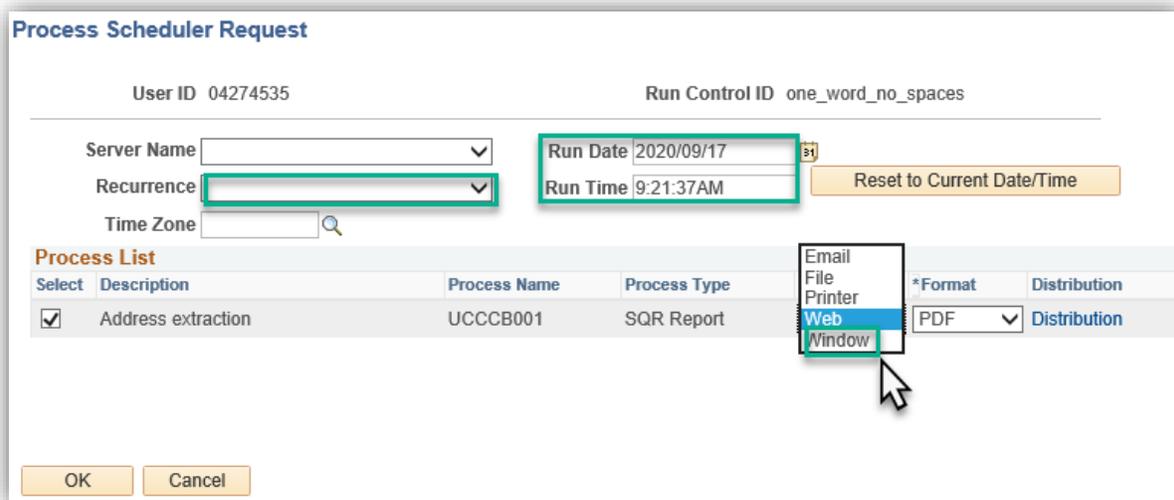
Communication Speed Key:

14. The Process Scheduler Request enables you to set the run date and time, how often the process runs, output type and format.

Type displays options for output type:

- Web (default) sends all output of the process to the report repository and can be accessed in Report Manager.
- Printer works only when the printer is on a network
- Window opens a new window to monitor the progress of the Run Control.

For this example, click the **Window** list item.



Process Scheduler Request

User ID 04274535 Run Control ID one_word_no_spaces

Server Name [dropdown]

Run Date 2020/09/17

Recurrence [dropdown]

Run Time 9:21:37AM

Time Zone [dropdown]

Reset to Current Date/Time

Process List

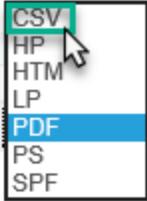
Select	Description	Process Name	Process Type	*Format	Distribution
<input checked="" type="checkbox"/>	Address extraction	UCCCB001	SQR Report	PDF	Distribution

OK Cancel

Email
File
Printer
Web
Window

15. Format lists several selections:
- PDF (Default) would be selected if the report were to be distributed to individuals so they cannot modify it.
 - CSV allows the data to be converted to Excel in a comma delimited format.

For this example, click the **CSV** list item.



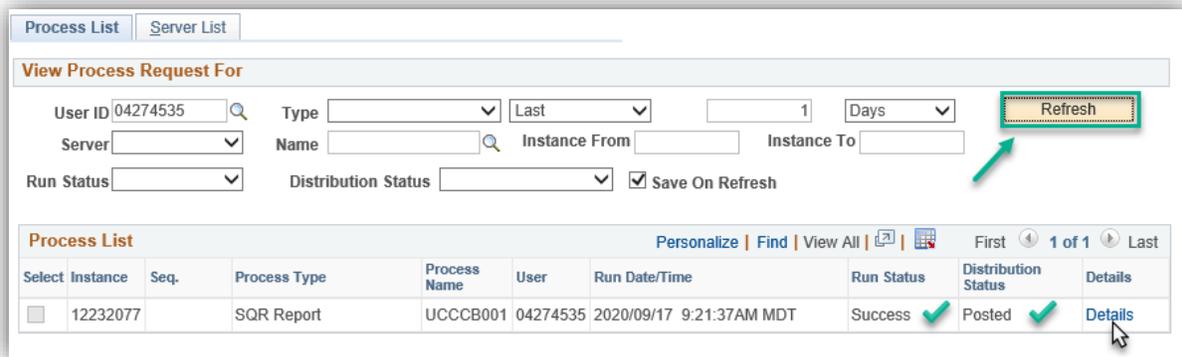
16. When all values are entered on Process Scheduler Request, click the **OK** button.



17. Since Window was selected, a window displays the process of the Run Control. Queued, Processing and Success display and when the process is complete, Excel will prompt to Open, Save or Save As when using the Windows option.



18. When the window option is not selected, you will need to click **Refresh** to monitor the process. When success and posted displays, you can click on the **Details** link.



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

Process Detail

Process	
Instance	12232077
Type	SQR Report
Name	UCCCB001
Description	Address extraction
Run Status	Success
Distribution Status	Posted

Run	Update Process
Run Control ID	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input checked="" type="checkbox"/> Delete Request <input type="radio"/> Re-send Content
Location	<input type="radio"/> Restart Request
Server	
Recurrence	

Date/Time	Actions
Request Created On	Parameters Transfer
Run Anytime After	Message Log
Began Process At	Batch Timings
Ended Process At	View Log/Trace

20. View Log/Trace includes the File List which lists the **Postal_extract.csv** file. Click the [Postal_extract.csv](#) link.

View Log/Trace

Report	
Report ID	7148654
Process Instance	12232077
Name	UCCCB001
Process Type	SQR Report
Run Status	Success

Address extraction

Distribution Details	
Distribution Node	PSREPORTS
Expiration Date	2020/11/01

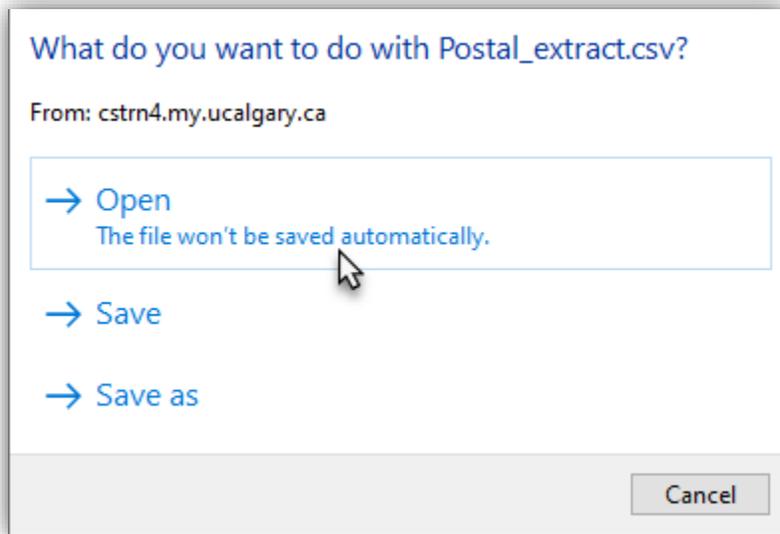
File List

Name	File Size (bytes)	Datetime Created
Postal_extract.csv	19,693	2020/09/17 9:23:32.373323AM MDT
Postal_extract_no_address.csv	129	2020/09/17 9:23:32.373323AM MDT
SQR_UCCCB001_12232077.log	1,909	2020/09/17 9:23:32.373323AM MDT
ucccb001_12232077.out	639	2020/09/17 9:23:32.373323AM MDT

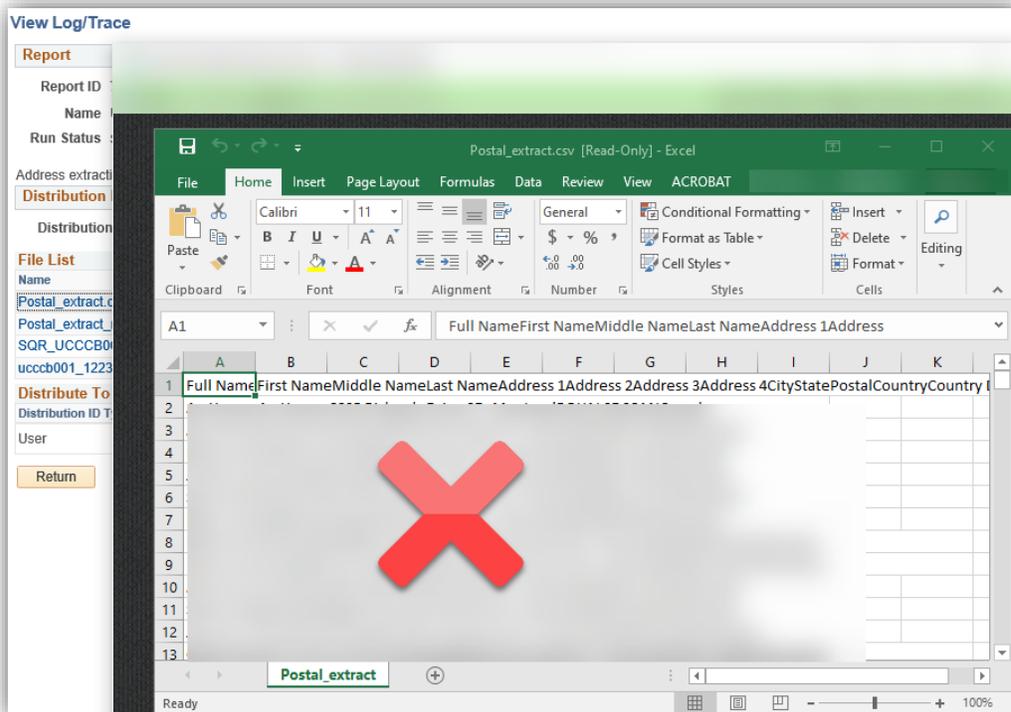
Distribute To	
Distribution ID Type	*Distribution ID
User	04274535

[Return](#)

21. You will be prompted to **Open, Save** or **Save as**. For this example, click **Open**.



22. Save the file in your preferred location and change the name if desired. *Note: Information has been removed for FOIP reasons.*



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

End of Procedure.