

Process Student Groups

OBJECTIVE: Explain steps taken to use the Process Student Groups with both PS Query and External File.

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[LESSON 2: HOW TO USE THE EXTERNAL FILE OPTION.....PG. 4](#)

NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/it/cms/documentation.html> to locate the **CAMPUS COMMUNITY FUNCTIONAL LEAD.**

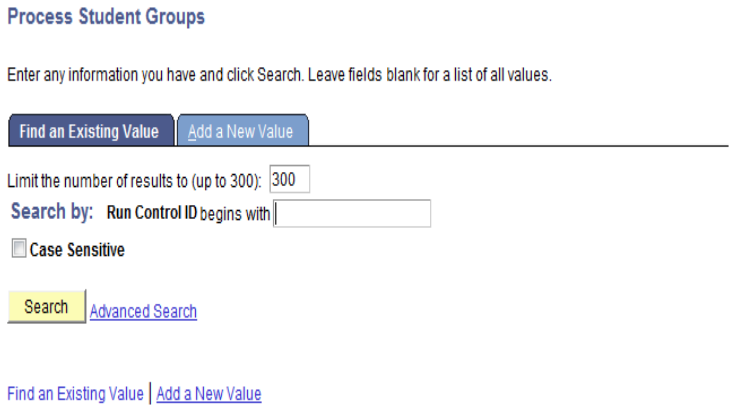
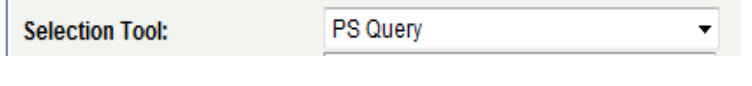
Lesson 1: How to Process Student Groups Using PS Query *Population Selection*






Navigation: Main Menu > Records and Enrollment > Career and Program Information > Process Student Groups

Introduction

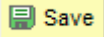
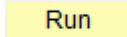
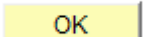
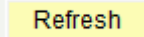
New with PeopleSoft 9.0, the process for assigning a group of students to a student group can be run with or without *Population Selection* selected. Population Selection allows you to use a query to identify students for updating or adding students to a student group. If you use the Population Selection PS Query option, you must include the STDNT_GRP_BIND record in the query to place it in the list of eligible queries on the Process Student Group page. Please contact your CMS lead in order to make sure that the query you are using has this bind record.

Note: When inactivating a group of students, it should never be set for the same date as the activation row. For example, if you activate a group of students for the RATH student group on 5/21/2012 the earliest they can/should be inactivated is 5/22/2012. Never run an activation and inactivation on the same day. For questions or concerns please contact your CMS functional lead.

Step	Action		Screenshot
1	If	Then	 <p>The screenshot shows the 'Process Student Groups' page. It includes a search bar with 'Find an Existing Value' and 'Add a New Value' buttons. Below the search bar, there is a text input field for search criteria, a 'Limit the number of results to (up to 300):' dropdown set to '300', a 'Search by:' dropdown set to 'Run Control ID begins with', and a 'Case Sensitive' checkbox. At the bottom of the search section, there are 'Search' and 'Advanced Search' buttons. Below the search section, there are 'Find an Existing Value' and 'Add a New Value' links.</p>
	A run control exists and you know the ID...	Enter it in the Run Control ID box and click Search .	
	A new run control needs to be created...	Click on Add a New Value , enter a name for the run control, and click Add .	
2	Select PS Query in the drop down menu under Selection Tool.		 <p>The screenshot shows a 'Selection Tool:' label followed by a dropdown menu. The dropdown menu is open, showing 'PS Query' as the selected option.</p>

3	Under Query Name enter the name of the query that you would like to use for this process. Please note that in order to use this option you need to include the STDNT_GRP BIND record in your query, otherwise the query cannot be used in this process. If you don't know the name of the query that you wish to use or don't know if the STDNT_GRP_BIND record has been attached to the query, click the magnifying glass to see if the query shows up.	<p>Query Name: <input type="text" value="SON_AD_ARSA_TO_RATH"/> </p>
4	Click on the Edit Prompts link to enter in any prompts that are needed to run the query. (This option will only show up if your query requires prompts).	<p>Edit Prompts</p>
5	Click on the Preview Selection Results to see how many rows the query returns.	<p>Preview Selection Results</p>
6	Under Student Group Data Academic Institution should default to SOCMP.	<p>*Academic Institution <input type="text" value="SOCMP"/>  Sonoma State University</p>
7	Enter the student group.	<p>*Student Group <input type="text" value="RATH"/>  Athletes</p>
8	Enter an effective date to use for all of the IDs assigned to the student group. The default value is the current system date.	<p>*Effective Date <input type="text" value="02/20/2012"/> </p>
9	Effective Status should be Active or Inactive. NOTE: If you are using the inactive function, the inactive date needs to be different from the active date.	<p>*Effective Status <input type="text" value="Active"/> </p>
10	Enter a comment that you want to assign to each student for the process (This is optional).	<p>Comment <input type="text" value="Fall 2011"/></p>

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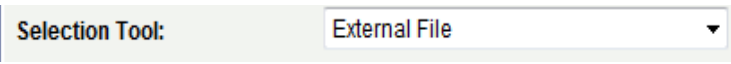
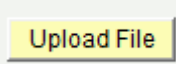

11	Click Save					
12	Click Run					
13	Server Name should be PSUNX	Server Name: <input type="text" value="PSUNX"/>				
14	Click OK					
15	Click the Process Monitor link	Process Monitor				
16	Click the Refresh button					
17	Until Run Status is Success and Distribution Status in Posted	<table border="1"> <thead> <tr> <th>Run Status</th> <th>Distribution Status</th> </tr> </thead> <tbody> <tr> <td>Success</td> <td>Posted</td> </tr> </tbody> </table>	Run Status	Distribution Status	Success	Posted
Run Status	Distribution Status					
Success	Posted					
18	Click the Details link	Details Details				
19	Click the Message Log link	Message Log				
20	Look for the Total Population row to see if the number inserted matches the number of rows in your query	<table border="1"> <tr> <td>10</td> <td>11:08:24AM</td> <td>Total Population Selection Emplids Inserted: 85</td> </tr> </table>	10	11:08:24AM	Total Population Selection Emplids Inserted: 85	
10	11:08:24AM	Total Population Selection Emplids Inserted: 85				
21	If the numbers match your process is complete. If the numbers do not match you will need look at the Message Log to see why.					

Lesson 2: How to Process Student Groups Using an External File


Navigation: Main Menu > Records and Enrollment > Career and Program Information > Process Student Groups

Introduction

The process for assigning a group of students to a student group can be run using an external file. The steps below will walk you through the process of using an external file to load a student group to a list of students. The external file should be in .csv format and should have only emplids (Student ID's) in the file. Before you save the file as a .csv make sure that the full emplid is listed including the zeros. Once the file is saved the .csv format will drop the leading zeros.

Step	Action		Screenshot					
1	<table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: center;">If</th> <th style="text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">A run control exists and you know the ID...</td> <td style="vertical-align: top;">Enter it in the Run Control ID box and click Search.</td> </tr> <tr> <td style="vertical-align: top;">A new run control needs to be created...</td> <td style="vertical-align: top;">Click on Add a New Value, enter a name for the run control, and click Add.</td> </tr> </tbody> </table>	If	Then	A run control exists and you know the ID...	Enter it in the Run Control ID box and click Search .	A new run control needs to be created...	Click on Add a New Value , enter a name for the run control, and click Add .	
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A run control exists and you know the ID...	Enter it in the Run Control ID box and click Search .							
A new run control needs to be created...	Click on Add a New Value , enter a name for the run control, and click Add .							
2	Select External File in the drop down menu under Selection Tool							
3	Click the Upload File button							
4	Once the file has been uploaded, the file name will appear next to Attached File.							

5	Enter the File Mapping name Student Group Load	File Mapping: <input type="text" value="STUDENT GROUP LOAD"/>
6	Click on the Preview Selection Results link to view your file that has been uploaded.	Preview Selection Results
7	Under Student Group Data Academic Institution should default to SOCMP.	*Academic Institution <input type="text" value="SOCMP"/> Sonoma State University
8	Enter the student group	*Student Group <input type="text" value="RATH"/> Athletes
9	Enter an effective date to use for all of the IDs assigned to the student group. The default value is the current system date.	*Effective Date <input type="text" value="02/20/2012"/>
10	Effective Status should be Active or Inactive. NOTE: If you are using the inactive function, the inactive date needs to be different from the active date.	*Effective Status <input type="text" value="Active"/>
11	Enter a comment that you want to assign to each student for the process. (This is optional)	Comment <input type="text" value="Fall 2011"/>
12	Click Save	<input type="button" value="Save"/>
13	Click Run	<input type="button" value="Run"/>
14	Server Name should be PSUNX	Server Name: <input type="text" value="PSUNX"/>
15	Click OK	<input type="button" value="OK"/>
16	Click the Process Monitor link	Process Monitor

17	Click the Refresh button					
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