

How to Mass Assign and Mass Release Service Indicators

OBJECTIVE: This guide will describe the process of how to mass assign and mass release service indicators for a list of students.

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NEED ADDITIONAL INFORMATION?

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

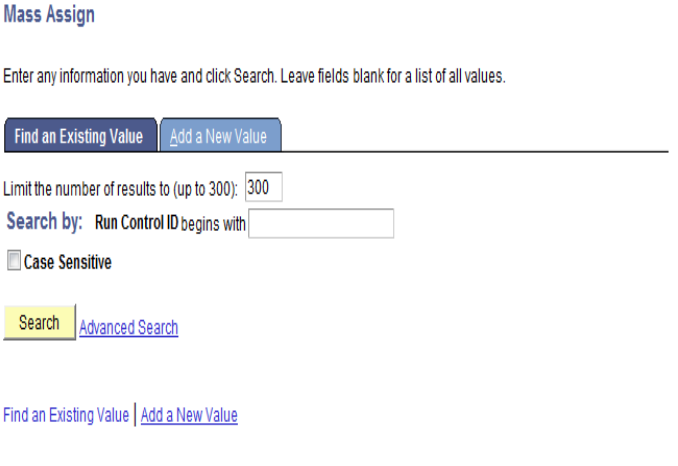
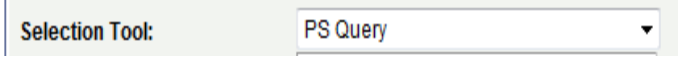
Lesson 1: Mass Assign Using PS Query




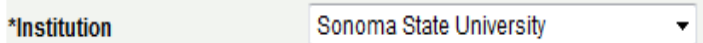
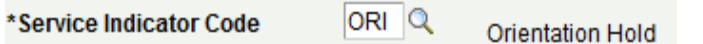
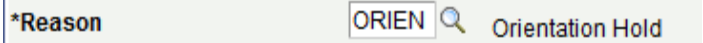
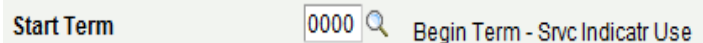

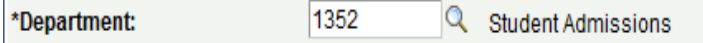
Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Assign

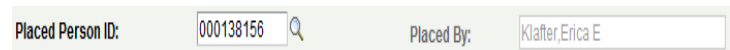

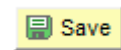
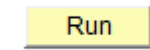
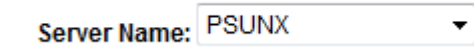

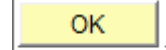
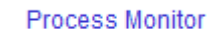
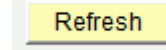
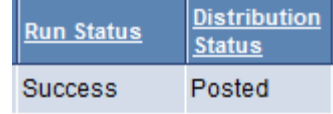
Introduction

This lesson will describe the process of mass assigning a service indicator to a list of students using PS Query. If you use the PS Query option, you must include the SCC_BND_SRCIND record in the query to place it in the list of eligible queries on the Mass Assign page. Please contact your CMS lead in order to make sure that the query you are using has this bind record.

Please note that if a student in your query already has the service indicator that you are trying to assign, the process will add a duplicate service indicator onto the student's record.

Step	Action		Screenshot
1	<p style="text-align: center;">If</p>	<p style="text-align: center;">Then</p>	 <p>The screenshot shows the 'Mass Assign' page. It includes a search bar with buttons for 'Find an Existing Value' and 'Add a New Value'. Below the search bar, there is a text input field for 'Search by: Run Control ID begins with'. There is also a checkbox for 'Case Sensitive' and a 'Search' button. At the bottom of the screenshot, the 'Selection Tool' dropdown menu is visible, showing 'PS Query' selected.</p>
	<p>A run control exists and you know the ID...</p>	<p>Enter it in the Run Control ID box and click Search.</p>	
	<p>A new run control needs to be created...</p>	<p>Click on Add a New Value, enter a name for the run control, and click Add.</p>	
2	<p>Select PS Query in the drop down menu under Selection Tool.</p>		 <p>The screenshot shows a dropdown menu labeled 'Selection Tool:' with 'PS Query' selected.</p>

Step	Action	Screenshot
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 SCC_BND_SRCIND 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 SCC_BND_SRCIND record has been attached to the query, click the magnifying glass to see if the query shows up.	
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).	
5	Click on the Preview Selection Results to see how many rows the query returns.	
6	Under Service Indicator Data Institution should default to Sonoma State University.	
7	Enter the Service Indicator Code	
8	Enter the Reason	
9	Under Effective Period you can enter a start term and end term or leave the start term as 0000 and the indicator will stay on until it is removed.	
10	Enter a start date	
11	Under Assignment Details the department will default to the department that is tied to the Service Indicator that is being assigned.	

Step	Action	Screenshot
12	Under Contact Information the Placed Person ID and Placed By name will default to the person that is assigning the Service Indicator. If you are assigning this for someone else you will want to change the Placed Person ID.	
13	Enter a comment that you want to assign to each student for the process (This is optional).	
14	Click Save	
15	Click Run	
16	Server Name should be PSUNX	
17	Under Process list check the box for SCC_SI_ASSN.	
18	Click OK	
19	Click the Process Monitor link	
20	Click the Refresh button	
21	Until Run Status is Success and Distribution Status in Posted.	
22	The process is now complete.	

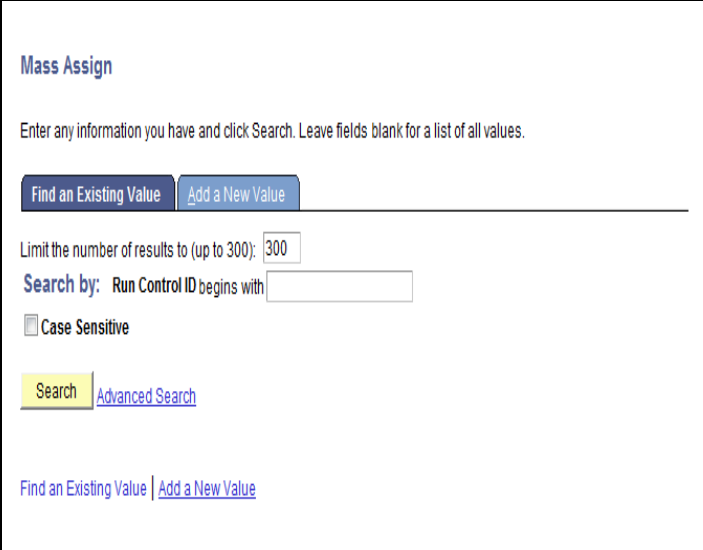
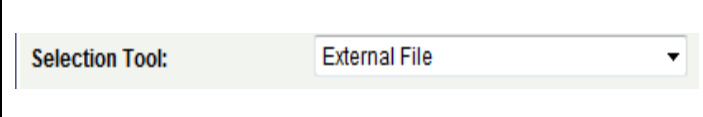

Lesson 2: Mass Assign Using an External File

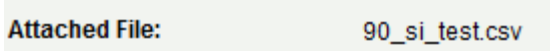


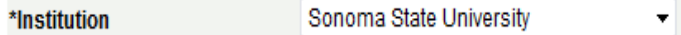
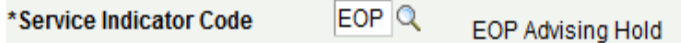
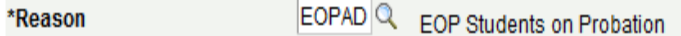
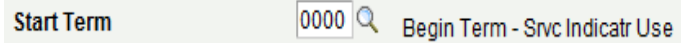
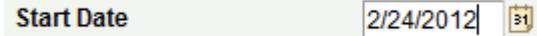

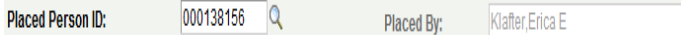

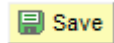
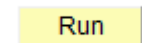
Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Assign

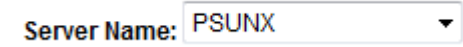

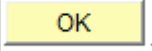

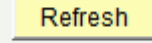
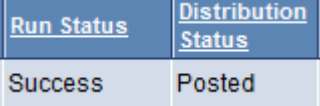
Introduction

The process for assigning a group of students a service indicator can be run using an external file. The steps below will walk you through the process of using an external file to load service indicators to a list of students. The external file should be in .csv format and should have only emplids in the file.

Please note that if a student in your file already has the service indicator that you are trying to assign, the process will add a duplicate service indicator onto the student's record.

Step	Action		Screenshot
1	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 .	
2	Select External File in the drop down menu under Selection Tool.		
3	Click the Upload File button.		

Step	Action	Screenshot
4	Once the file has been uploaded, the file name will appear next to Attached File.	
5	Enter the File Mapping name Service Indicator Load.	
6	Click on the Preview Selection Results link to view your file that has been uploaded.	
7	Under Service Indicator Data Institution should default to Sonoma State University.	
8	Enter Service Indicator Code	
9	Enter Reason	
10	Under Effective Period you can enter a start term and end term or leave the start term as 0000 and the indicator will stay on until it is removed.	
11	Enter a start date	
12	Under Assignment Details the department will default to the department that is tied to the Service Indicator that is being assigned.	
13	Under Contact Information the Placed Person ID and Placed By name will default to the person that is assigning the Service Indicator. If you are assigning this for someone else you will want to change the Placed Person ID.	
14	Enter a comment that you want to assign to each student for the process (This is optional).	
15	Click Save	
16	Click Run	

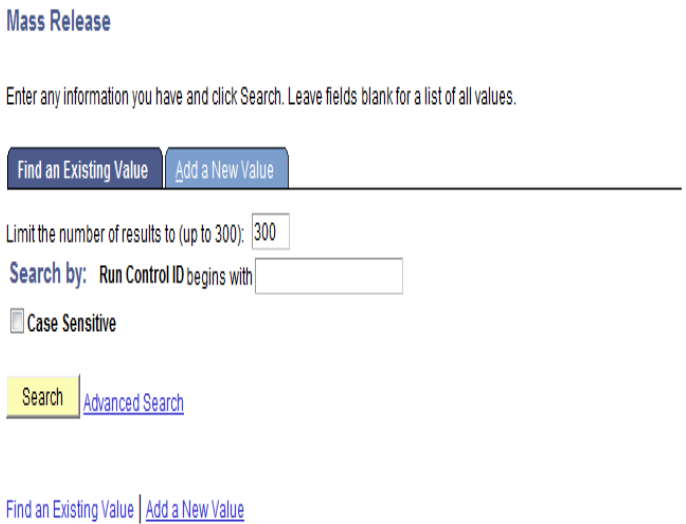
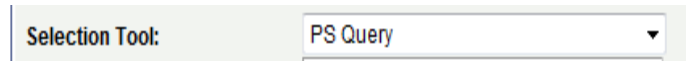
Step	Action	Screenshot
17	Server Name should be PSUNX	
18	Under Process list check the box for SCC_SI_ASSN.	
19	Click OK	
20	Click the Process Monitor link	
21	Click the Refresh button	
22	Until Run Status is Success and Distribution Status in Posted.	
23	Process is now complete.	




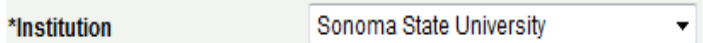
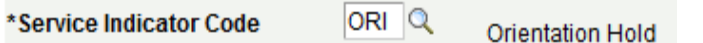
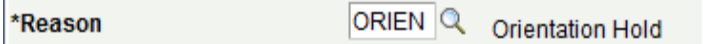
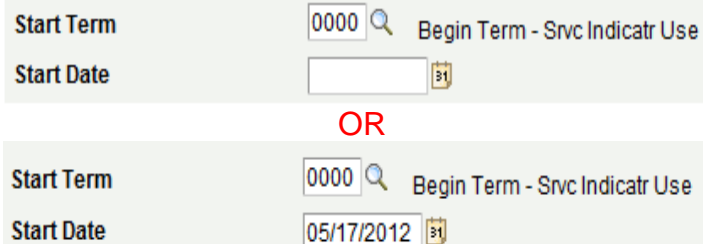
Lesson 3: Mass Release Using PS Query

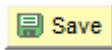
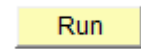
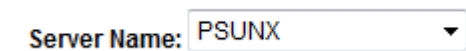
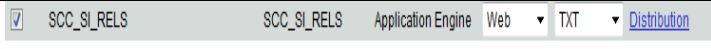
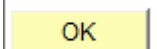
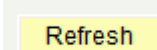

Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Release

Introduction

This lesson will describe the process of mass releasing a service indicator to a list of students using PS Query. If you use the PS Query option, you must include the SCC_BND_SRCIND record in the query to place it in the list of eligible queries on the Mass Release page. Please contact your CMS lead in order to make sure that the query you are using has this bind record.

Step	Action		Screenshot
1	If	Then	 <p>Mass Release</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>Limit the number of results to (up to 300): 300</p> <p>Search by: Run Control ID begins with <input type="text"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Advanced Search</p> <p>Find an Existing Value Add a New Value</p>
2	Select PS Query in the drop down menu under Selection Tool.		 <p>Selection Tool: <input type="text" value="PS Query"/></p>

Step	Action	Screenshot
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 SCC_BND_SRCIND 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 SCC_BND_SRCIND record has been attached to the query, click the magnifying glass to see if the query shows up.	
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).	
5	Click on the Preview Selection Results to see how many rows the query returns.	
6	Under Service Indicator Data Institution should default to Sonoma State University.	
7	Enter the Service Indicator Code	
8	Enter the Reason	
9	Under Effective Period if the query that is being used has a combination of Start Dates all the service indicators will be released if the Start Date is left blank or you can control the population that gets released by entering in a Start Date.	


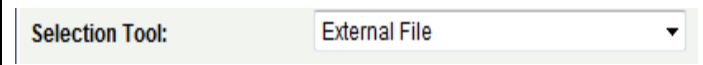
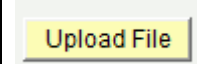
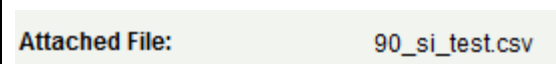
Step	Action	Screenshot
10	Click Save	
11	Click Run	
12	Server Name should be PSUNX	
13	Under Process list check the box for SCC_SI_RELS.	
14	Click OK	
15	Click the Process Monitor link	Process Monitor
16	Click the Refresh button	
17	Until Run Status is Success and Distribution Status in Posted	
18	The process is now complete	

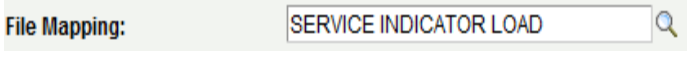
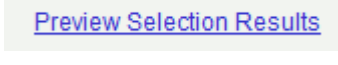
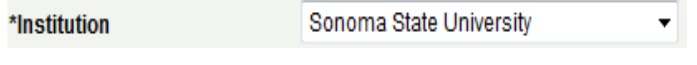
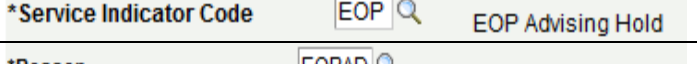
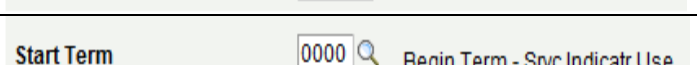
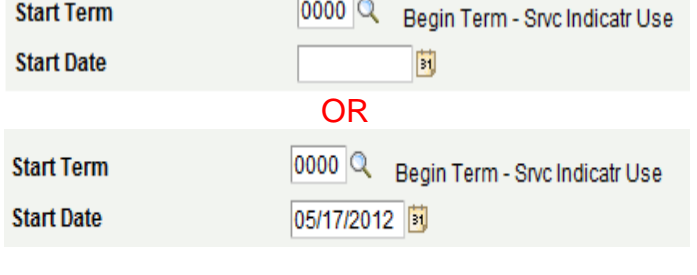
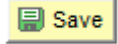
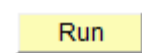
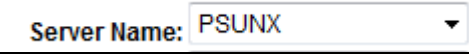
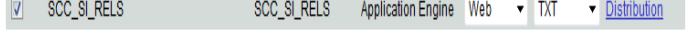
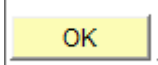

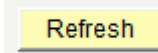
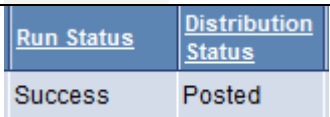
Lesson 4: Mass Release Using an External File

Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Release

Introduction

The process for releasing service indicators can be run using an external file. The steps below will walk you through the process of using an external file to release service indicators to a list of students. The external file should be in .csv format and should have only emplids in the file.

Step	Action		Screenshot						
1	<table border="1"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>A run control exists and you know the ID...</td> <td>Enter it in the Run Control ID box and click Search.</td> </tr> <tr> <td>A new run control needs to be created...</td> <td>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 .		
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 .								
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.								

Step	Action	Screenshot
5	Enter the File Mapping name Service Indicator Load.	
6	Click on the Preview Selection Results link to view your file that has been uploaded.	
7	Under Service Indicator Data Institution should default to Sonoma State University.	
8	Enter Service Indicator Code	
9	Enter Reason	
10	Under Effective Period if the file that is being used has a combination of Start Dates all the service indicators will be released if the Start Date is left blank or you can control the population that gets released by entering in a Start Date.	
11	Click Save	
12	Click Run	
13	Server Name should be PSUNX	
14	Under Process list check the box for SCC_SI_RELS.	
15	Click OK	
16	Click the Process Monitor link	
17	Click the Refresh button	
18	Until Run Status is Success and Distribution Status in Posted.	
19	Process is now complete	