



# USING POPULATION SELECTION

## OVERVIEW

Population Selection (Pop Select) is a new feature in PeopleSoft Campus Solutions 9.0. Pop Select allows users to fine-tune the selecting of person and/or organization IDs in several batch processes. Prior to version 9.0, there was no delivered way to completely control ID selection within batch processes such as the Mass Assignment of Service Indicators, Processing Transcripts, and Aid Year Activation.

Below is a full list of delivered Campus Solutions processes that use Population Selection:

Module Area	Process
CR	Audience Criteria
AA	Advisement Report
AD	Application Delete by Batch
AD	Prospect Delete by Batch
CC	3C Engine
CC	Mass User Security Replacement
CC	Population Selection Update
CC	Process Student Groups
CC	Service Indicator Person Mass Release
CC	Service Indicator Organization Mass Release
CC	Service Indicator Person Mass Assign
CC	Service Indicator Organization Mass Assign
FA	Aid Year Activate
FA	Mass Packaging Select
FA	Select Students for Need Summary Validation
FA	Select Students for Repackaging
FA	Process SAP
FA	Student Financials External Award Feed
SF	Mass Contract Select (Payment Plan & Third Party)
SF	Mass Contract Select for Cancelations (Payment Plan & Third Party)
SR	Process Transcripts



## UNDERSTANDING POPULATION SELECTION

There are three main components of Population Selection: context definition, selection tools, and the Pop Select group box.

### CONTEXT DEFINITION

In order to use Population Selection for a particular process, it must have a context definition. The context definition tells Population Selection:

- The batch process using Pop Select
- The component that houses that process
- The selection tools that can be used
- The bind record, which contains fields that are required to run the process

Context Definition Selection Mapping

\*Context Name SI Mass Assignment (Student)

Process Type Application Engine

Process Name SCC\_SI\_ASSN

Description Service Indicator Mass Assign for Student Navigation

\*Status Active

Applicable Menu Navigation

*Menu Name	*Component Name
1 MAINTAIN_SERVICE_IND_STDNT	SCC_SI_ASSN

Applicable Selection Tools

Selection Tool	Description	Full Access	Exception
1 PS Query	PeopleSoft Query Manager	<input checked="" type="checkbox"/>	Exception
2 Equation Engine	Student Administration Equation Engine	<input checked="" type="checkbox"/>	Exception
3 External File	Student Administration File Parser	<input checked="" type="checkbox"/>	Exception



**Context Definition**   **Selection Mapping**

**Context Name**      SI Mass Assignment (Student)  
**Status**              Active

**Pop Selection Integration**

Context varies per Application Data

**Process Required Fields**      Find | View All      First 1 of 1 Last

Results Record      SCC\_SRVIND\_DRV      Result table  
 Required Fields Record      SCC\_BND\_SRCIND      Bind Record

**Data Source Records**      Customize | Find | View All |      First 1 of 1 Last

*Record (Table) Name	Record Description
1 SCC_BND_SRCIND	Pop Selecti

Validate Edit Prompt Values

**Required Fields Mapping**      Customize | Find | View All |      First 1-2 of 2 Last

**Mapping Information**

Results Record Fields	*Mapping Action	Required Fields
1 EMPLID	Direct	EMPLID
2 PROCESS_INSTANCE	Process Instance	

## SELECTION TOOLS

There are three selection tools that can be used with Population Selection: PS Query, Equation Engine, and an External File. The context definition defines which selection tools are available for a particular process.

## POPULATION SELECTION GROUP BOX

The Pop Select group box appears on the run control page for the associated process. Use the group box to choose which selection tool to use and the query, equation, or file that contains the IDs for this process.

**Population Selection**

**Selection Tool**      PS Query

**Query Name**            [Launch Query Manager](#)



## USING POPULATION SELECTION

The example for this document is assigning a negative service indicator to block registration for all first year students until they see their advisors.

To use Pop Select, create the selection source containing the IDs you need for your batch process then run the process using that selection source.

### CREATE THE SELECTION SOURCE

The selection source can be an equation, a query, or an external file. For this example, the selection source is a query.

### DETERMINE THE BIND RECORD

When using a query or an equation for the selection source, the bind record from that process' context definition must be included. If the bind record isn't included, you will not be able to choose that query or equation when you run the process.



For a list of the bind records associated with each process, please see the Appendix to this document.

As we are going to assign service indicators, we need to view the context definition for the Service Indicator Mass Assignment (Student) process.

### NAVIGATION

*Set Up SACR > System Administration > Utilities > Population Selection > Context Definition*

The screenshot shows the 'Context Definition' tab for the 'SI Mass Assignment (Student)' process. The 'Data Source Records' table is visible, containing one record:

*Record (Table) Name	Record Description
1 SCC_BND_SRCIND	Pop Selection Bind Record

A blue callout box labeled 'Bind Record' points to the record in the table.



## BUILD THE QUERY

In order to build the query, you must have the correct security access to Query Manager.



Once the query is built, anyone with access to that batch process will be able to use it within the Pop Select group box. However, if the user does not have Query Manager access, they will not be able to view or edit the query.

Build your query to select the students you need, making sure to include the appropriate bind record.

The screenshot shows the Query Manager interface with the following details:

- Query Name: MDS\_SI\_POP\_SELECT
- Description: First-year undergraduates
- Section: Find an Existing Record
- Search criteria: Record Name begins with SCC\_BND
- Search Results table:

Record	Join Record	Show Fields
SCC_BND_SI_ORG - Pop Selection Bind Record	<a href="#">Join Record</a>	<a href="#">Show Fields</a>
SCC_BND_SRCIND - Pop Selection Bind Record	<a href="#">Join Record</a>	<a href="#">Show Fields</a>

At the bottom of the interface, there are buttons for Save, Save As, New Query, Preferences, Properties, New Union, and Return to Search.



## RUN THE PROCESS

Once a selection source exists, you can run the batch process and use Population Selection with that source. In this case, we're going to use the Mass Assignment Service Indicators (Student) process.

## NAVIGATION

Campus Community > Service Indicators (Student) > Mass Assign

1. In the Population Selection group box, choose a selection tool of PS Query.
2. Click on the Query Name lookup icon to choose your query.
3. You can view the query results by clicking the Preview Selection Results link:
4. Enter the rest of your information, click Run, and run the process as usual.

**Preview Selection Results**

[Return](#)

	ID	ID	Career	Name	Admit Term	Institution	Campus
1	0058	0058	UGRD	Hanks Jr.,Thomas Aaron	0630	PSUNV	MAIN
2	0060	0060	UGRD	Struthers,Sally	0630	PSUNV	MAIN
3	0062	0062	UGRD	Wells,Tuesday	0630	PSUNV	MAIN
4	0075	0075	UGRD	Dent,Stu	0630	PSUNV	MAIN
5	AD100	AD100	UGRD	Summers,Samantha	0630	PSUNV	MAIN
6	AD101	AD101	UGRD	Povoski,Terry	0630	PSUNV	MAIN
7	AD3200	AD3200	UGRD	English,Stacey	0630	PSUNV	MAIN
8	AD3201	AD3201	UGRD	English,Scott	0630	PSUNV	MAIN
9	AD3510	AD3510	UGRD	Krause,Stephanie A	0630	PSUNV	MAIN
10	AD3511	AD3511	UGRD	Krause,Ryan	0630	PSUNV	MAIN

**Mass Assign**

Run Control ID: Advising\_Hold [Report Manager](#) [Process Monitor](#) [Run](#)

Population Selection

Selection Tool: PS Query

Query Name: MDS\_SI\_POP\_SELECT [Launch Query Manager](#) [Preview Selection Results](#)

**Look Up Query Name**

Search by: Query Name begins with

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

**Search Results**

View All First 1-5 of 5 Last

Query Name	Description
HTS MASS RELEASE EXAMPLE	Need HS Transcript - Place SI
MDS_SI_POP_SELECT	First-year undergraduates
QA_CS_CC_PS_SI_ACADRECRUIT	Pop Slect SI Academic Recruits



## APPENDIX: PROCESS BIND RECORDS

Area	Process	Bind Record
CR	Audience Criteria	SCC_PS_AUDO_BND (Audience Bind - Org Based) SCC_PS_AUD_BND (Bind View For Audience)
AA	Advisement Report	SAA_RPTRQST_BND
AD	Application Delete by Batch	SAD_APP_DEL_BND
AD	Prospect Delete by Batch	SAD_PRS_DEL_BND
CC	3C Engine	SCC_PS_[XXXX]_BND XXXX = the administrative function (e.g., ADMA, FINA)
CC	Mass User Security Replacement	SCC_SCTYRPL_BND
CC	Population Selection Update	SCCPU_APRCR_BND (Bind table for AdmApp Recr Cat) SCCPU_PERS_BND (Bind for PERS_INST_REL) SCCPU_STDNT_BND (Bind for Population Update) CCPU_STDCR_BND (Bind for STDNT_CAREER) SCCPU_CARTM_BND (Bind for STDNT_CAR_TERM) SCCPU_STDCR_BND (Bind for STDNT_CAREER) SCCPU_EQUTN_BND (Bind for STDNT_EQUTN_VAR) SCCPU_FATRM_BND (Bind for STDNT_FA_TERM) SCCPU_STDNT_BND (Bind for Population Update)
CC	Process Student Groups	STDNT_GRP_BIND
CC	Service Indicator Person Mass Release	SCC_BND_SRCIND
CC	Service Indicator Organization Mass Release	SCC_BND_SI_ORG
CC	Service Indicator Person Mass Assign	SCC_BND_SRCIND
CC	Service Indicator Organization Mass Assign	SCC_BND_SI_ORG



<b>Area</b>	<b>Process</b>	<b>Bind Record</b>
FA	Aid Year Activate	SFA_ACTADYR_BND
FA	Mass Packaging Select	SFA_BPKGX_BIND (No Career) SFA_BPKG_BIND
FA	Select Students for Need Summary Validation	SFA_BNSV_BIND
FA	Select Students for Repackaging	SFA_BRPKGX_BIND (No Career) SFA_BRPKG_BIND
FA	Process SAP	SFA_SAP_BIND
FA	Student Financials External Award Feed	SSF_EA_BIND
SF	Mass Contract Select	SSF_PS_TPC_BND
SF	Mass Contract Select for Cancelations	SSF_PS_TPC_BND
SR	Process Transcripts	SSR_TSCREQ_BND